Embracing the Loyalty Equation

How telcos can reimagine experience and engagement to grow B2C

accenture

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Introduction

If there's one thing the communications industry has gotten right, it's **trust**. Consumers have confidence in their communications providers to protect data and provide services. Our research finds that telcos rank among the top three providers when it comes to consumer trust based on data security. Yet that trust is not matched by loyalty.

That's because trust is just one part of the loyalty equation—telcos across the industry are falling short on the other two: customer experience and engagement.

With the B2C connectivity market saturated and challenges on customer stickiness there is not much headroom for growth, this maybe why many CSPs are depriortizing B2C. Customers are noticing this, raising the risk of it turning into a vicious circle, with even more choosing to walk away. The result? Declining average revenue per user (ARPU) and higher customer service costs in a downward feedback cycle.

The industry and its operators have a choice: continue to compete on pricing as undifferentiated telecommunications utility providers or return to higher margin growth with a renewed consumer approach. Our report shows how to build on the advantage of trust by offering unparalleled customer experience and meeting unmet needs with new personalized services.

Reinvigorating telcos' B2C strategy

Business-to-consumer (B2C) revenue share is currently 70-90% of CSPs' business.[1] But, with just a 0.6% increase in revenue over six years, falling returns on capital and debt loads reaching new highs, the sector is experiencing an erosion of value. Even as consumers depend more and more on connectivity, driving massive growth in traffic and usage, telcos' consumer revenues continue to stagnate.

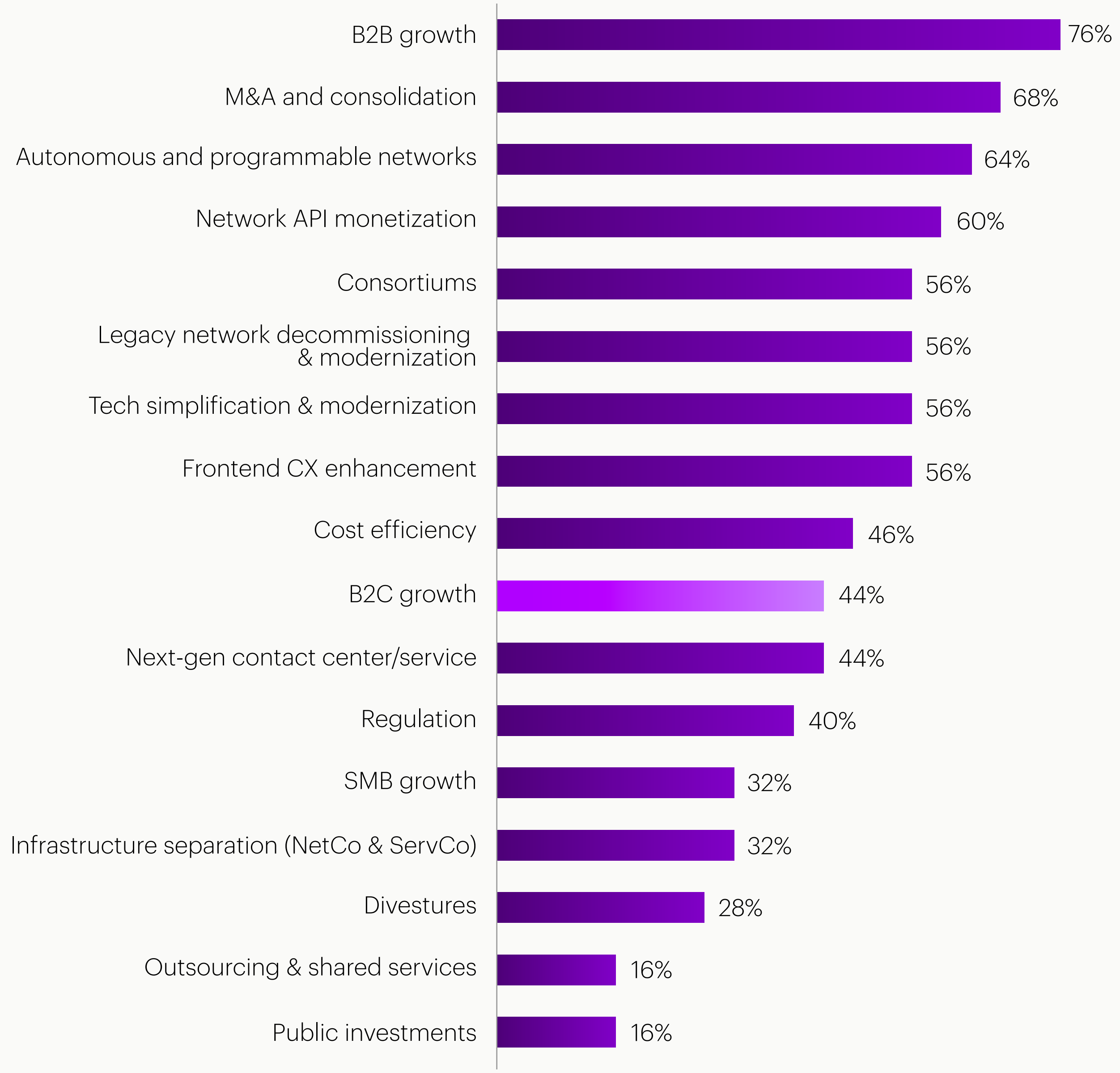
It's no surprise, then, that telecom leaders are placing their hopes elsewhere. We analyzed 12 months of public statements by 25 leading telcos around the world to see which growth areas are top priorities (Figure 1). Business-to-business (B2B) topped the list, with promises of strong staged growth. **B2C ranked tenth.** If this trend persists, the market forecasts that by 2030, B2C's share of telecom revenue will fall to 50%.

What we are hearing most from our telco clients, here and in our daily work, is that current investments in their B2C business focus on *efficiencies*. This reflects the view that B2C is an undifferentiated utility service with nominal incremental uplift from the existing base.

Our view is different: the C-suite must not give up on B2C growth. Leaders can rethink the loyalty equation and invest in the consumer as a lever for stronger revenues and higher margins.

Figure 1:
Analysis of global telco strategies in last 12 months (July 2023-24)[2]

% of CSPs which cited below strategies publicly in last 12 months



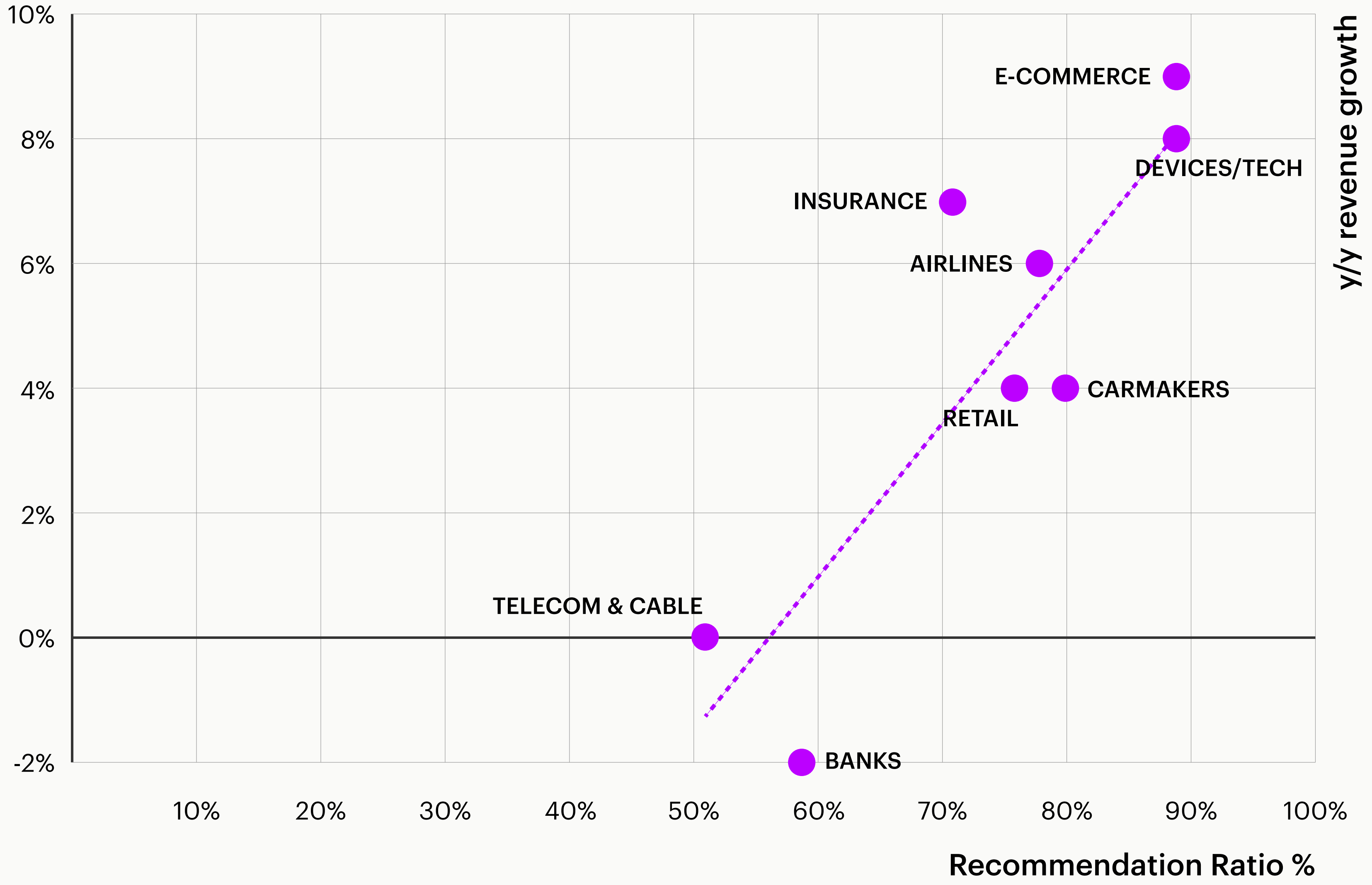
A renewed focus on the customer

Our research points to an antidote to commoditization. This growth strategy relies on a radical, but achievable, change in the telco-customer relationship, hinging on **loyalty**.

Currently, consumers' loyalty to their service providers remains, at best, fleeting, with only one-third of customers having stayed loyal to a service provider for more than five years.[3] Our analysis across eight sectors (see Figure 2) also shows that communications is among the sectors with the lowest customer recommendation ratio. This metric—which measures the percentage of people who are aware of a company and can spontaneously recommend their product or service to others—often closely correlates to revenue growth.

Figure 2:

Relationship between Consumer "Recommendation Ratio" vs. "Revenue Growth": Communications Industry vs. other industries (U.S. only)[4]



Note: "Recommendation Ratio" formula = count of brand recommended/ (count of brand recommended + count of brand avoided)

In our 2024 consumer survey, telcos are ranked among the three most trusted entities when it comes to data security, with 53% of broadband and 50% of wireless respondents finding their respective providers trustworthy.[5]

Figure 3:

Q15: How much do you trust the following company types to e.g. use appropriate security tools to provide data protection safeguard your personal data appropriately?? (Trustworthy= Sum of Completely trustworthy and Somewhat trustworthy;

Definition - Use appropriate security tools to provide data protection

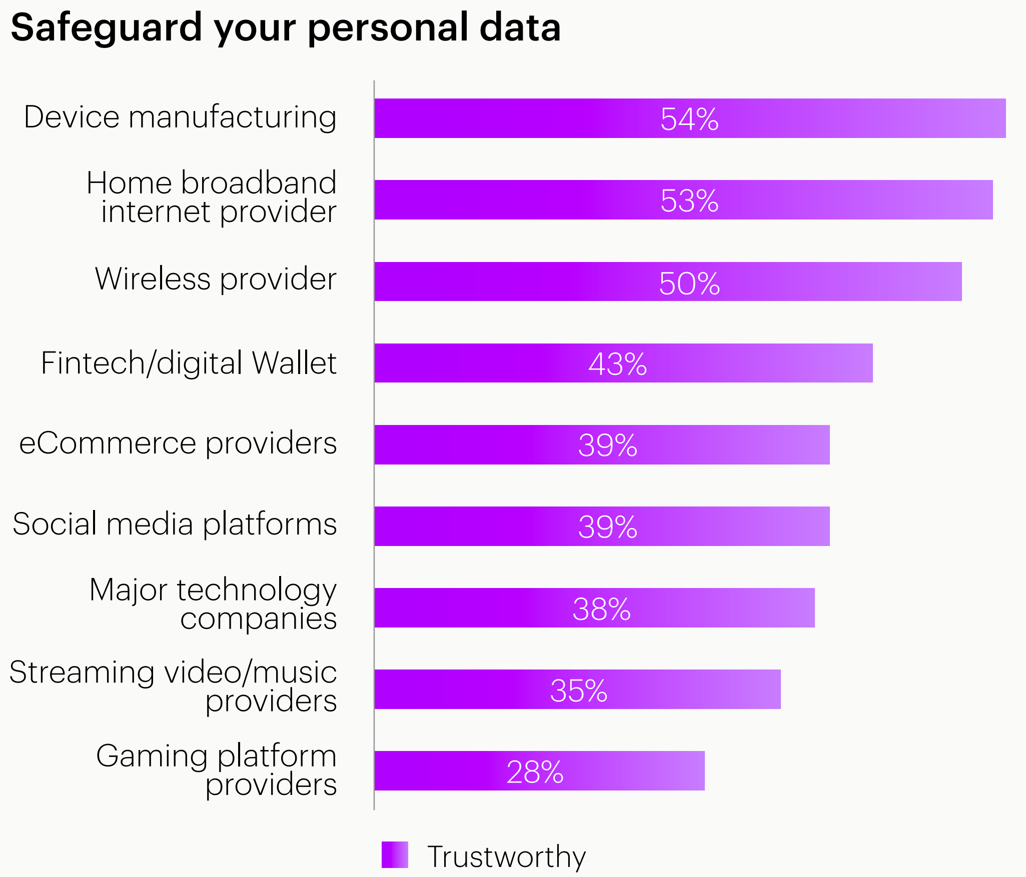
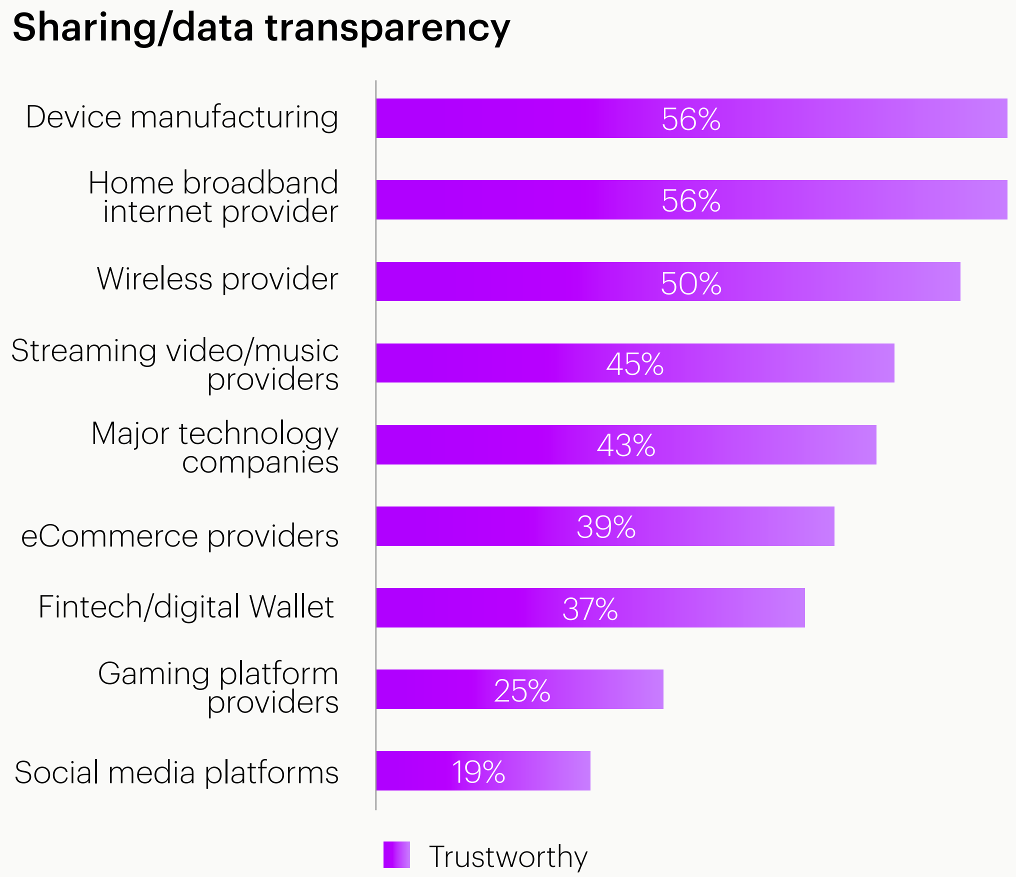


Figure 4:

Q16: How much do you trust the following company types to exhibit e.g. explicitly sharing where your personal data will be used when asked to provide transparency in personal data usage? Trustworthy= Sum of Completely trustworthy and Somewhat trustworthy;[4]

Definition – Explicitly sharing where personal data will be used when asked for and allowing the ease of opting out or managing data preferences



Note: Social media platforms (e.g., Facebook, X), Streaming video/music providers (e.g., Netflix, Spotify), Gaming platform providers (e.g., PlayStation, Xbox, Steam) eCommerce providers (e.g., Amazon, Alibaba), Major Technology companies (e.g., Google, Microsoft, Apple), Device Manufacturers (e.g., Samsung, LG), Fintech / Digital Wallet (e.g., Revolut, Square, Paypal, Alipay)

N=6,800

So, with the dissonance between what telcos consumers trust and what they are loyal to, what is holding back telco growth?

The Loyalty Equation: Trust+

Trust is a critical variable for customer loyalty, but only in conjunction with two others: experience and engagement.

Figure 5:
The customer loyalty equation

Consumer Loyalty =

Trust + Experience + Engagement

Our research and work with clients show that while **trust** is a strong opening position, where telcos enjoy an advantage, many consumers leave their providers in pursuit of a better outcome on these other two dimensions. It's time to rectify this to drive a resurgence in customer loyalty.[6]

That starts with understanding the consumer better.

As our research (Figures 3-4) revealed, devices top the **trust** chart. Many consumers are device loyalists, and the loyalty equation bears witness to this. The overall experience of a device is visceral, and device manufacturers invest considerable resources in building, refining and enhancing their customer engagement offerings. Telcos can learn from their device partners.

Telcos fall short on consumer expectations of a simplified, personalized experience.

Consumer expectations continue to rise, driving demand for heightened levels of personalization, one-click self-service and simplification across all touch points. Most B2C enterprises are already offering these features, and telcos are similarly investing in them. But their solutions seem to fall short in the following areas.

Seamless experience across channels

Consumers want to be seen as special and valuable. In our study, 74% of consumers identify the lack of personalized support as a potential source of frustration with customer service. True personalization requires a comprehensive understanding of the customer context to provide a seamless experience across all the services they use. But overall experience across digital and physical platforms remains fragmented: 70% of consumers remain frustrated by the lack of consistent service across telcos' contact channels and 48% are unhappy with having to repeat or restart interactions each time they use a new channel.[7]

This may be why 30.1% of our Life Trends survey respondents use both in-person and digital channels to interact with their telco providers, with 10.6% of them saying they have been gradually increasing their visits to telco retail locations for in-person advice.[9]

Fast and real-time support

Today's consumers expect immediate responses and faster problem resolution. Our study found that 55% of broadband consumers cite lack of responsive customer support as a major frustration point, and technical issues with online support platforms are not far behind at 47%.[8] When customers have to chase inconsistent solutions and navigate through layers of automated menus that do not address their particular concern, the systems miss the mark of "human-like" automation.

> **"I look for shortcuts in every area that I can. Anything that I can do to speed up my life, help make things go faster, better and be more accurate."**
>
> Stan, 46, in reply to our survey question, "In which areas do you expect brands to offer more innovative or quicker solutions?"
>
> **Source:** Life Trends survey

Consumers are looking for engaging services beyond connectivity, and telcos can play and win in this area.

Telcos have certain inherent strengths like customer intimacy, access to data and in-home reach. They also have a strong retail and distribution network and access to a large (potential) partner base.

These factors provide a unique opportunity to operators, as 46% of customers would be interested in subscribing and are willing to try adjacent and new digital services (beyond connectivity) from their telco providers.[10] For instance, our study found that when it comes to some of these adjacent and new digital services, consumers prefer the telco to offer this service – digital entertainment (72%), mobile wallet (69%), smart home (57%).

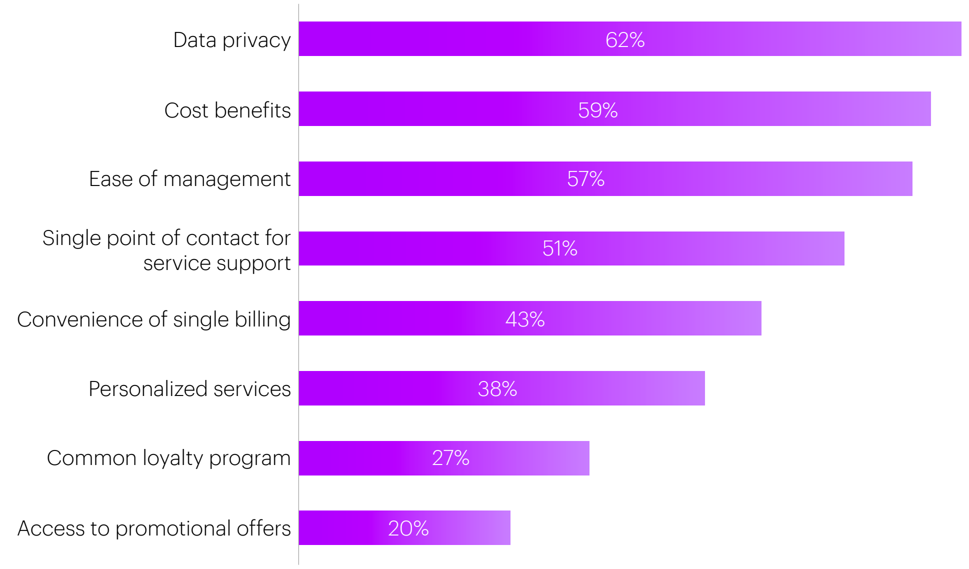
> **"People want support now AND in long-term goals. Anything that a brand can do for me that's making my life easier or that is saving me time is something that I think that it's important to spend money on, and that is in the short term now, but then also in the long term."**
>
> Amrita, 34, replying to our survey question, "In which areas do you expect brands to offer more innovative or quicker solutions?"
>
> **Source:** Life Trends survey

Nearly 80% of surveyed consumers in our Global Financial Services Payments study emphasized the significance of trust in the provider and confidence in transaction clearance as the paramount factors when making a payment.

Another key area of opportunity for telcos is customers' interest in digital bundles, which include a streamlined interface, consolidated billing and integrated customer support.[11] Considering their high scoring when it comes to data privacy, and because they already provide consumers select services (such as, mobile, broadband, TV), they stand a good to other service provider types, telcos are better suited to address certain customer considerations, like the data privacy, cost sensitivity and ease of management.

Figure 6:
Drivers to choose bundled digital services from CSPs

How important are the following factors that would encourage you to purchase bundled services from your telecom provider? (sum of top 2)



Right now, though, **only 10% of consumers are fully satisfied** with their telecom provider's digital services beyond connectivity,[12] indicating that there's room for improving the customer experience, in support, services and beyond.

To do so, telecoms must reframe their approach to the customer. They need to solve for customers' needs rather than sell them a point solution.

What will it take to complete the loyalty equation?

Consider this: 36 of the largest global communication service providers collectively spend $65 billion annually on customer service, amounting to 6.0% of their total revenue.[13] Yet Net Promoter Scores (NPS)—customer loyalty levels, in other words—remain suboptimal across the industry. This illustrates that while telcos are investing heavily in customer service, they still fall short of maximizing customer loyalty.

Why? Because the loyalty equation is missing experience and engagement. The best way to balance it? Focus on **two essential steps** that enhance each other: first**, use AI to transform customer experience** and then, building on the base of information and **AI-supported innovation, integrate relevant digital services** to become customers' digital advisors and monetize your data's reach.

01
Use AI to radically transform customer experience

Imagine:
Your telco's AI system knows you so well that it not only alerts you when your favorite team is playing a Champions League match on their premium channel, but also recommends a sports package will broadcast but also recommends a sports package and pre-match content you might enjoy based on your viewing habits. If you register interest in the offer, their AI system launches a real-time conversation, dynamically highlighting benefits while adapting to your questions and feedback and starts the channel add-on to your service.

Need more details about their offers? The AI seamlessly connects you to a human expert to address specific questions and then picks up where they leave off, guiding you through billing and set-up. Finally, it wraps up with a summary delivered to your preferred communication channel.

Before the big match, the provider's monitoring system spots on your Wi-Fi. It prompts a remote reset, ensuring your connection is flawless before the kick-off. As the match approaches, it keeps an eye on your network, sends reassuring updates so that you can relax, and even offers a loyalty discount for a food delivery service—perfect for hosting friends and family to watch the match together.

This is the kind of proactive, integrated and seamless customer experience CSP's could aspire to deliver. Turning trust into loyalty requires a shift to life-centric experiences. CSPs need to redefine the customer relationship, moving their focus from selling to solving problems. CSPs must position themselves as trusted advisors that help customers meet their changing needs and navigate technological complexities.

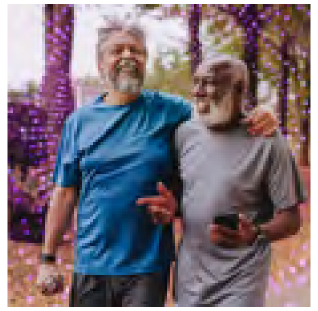
CSPs are aware that a profound change in their approach to the customer journey is overdue. Even though they understand their customers better than they did five years ago, their organization, systems and operating model have not kept pace. They should seize the chance to build a meaningful, value and life-centric experience anchored in:

Figure 7:
Hallmarks of telco customer experience delivery

Enable Proactive Care

"My telecommunications company notifies me about future bill changes or issues with connectivity."

Using gen AI, CSPs can analyze data from every customer interaction, including voice calls, giving them a comprehensive picture of the customer, including their behaviors and preferences. This holistic view allows CSPs to anticipate customer needs and address them proactively, enhancing the value exchange and fostering loyalty. By leveraging gen AI, CSPs can accurately predict future customer requirements; studies indicate an accuracy rate of 85-90%. The technology empowers telcos to resolve issues before they impact the customer experience, ensuring a seamless and satisfying journey.



Empowering Human Interactions

"When needed, I speak with a human agent who takes full responsibility for resolving any issue, regardless of its complexity."

Human agents, empowered and enhanced by AI, deliver exceptional customer experiences by combining AI-driven efficiency with human empathy and advanced problem-solving skills. AI allows agents to focus on addressing complex challenges in customers' digital lives, leveraging the company's knowledge management systems and both internal and external resources.

Conversational Personal Experiences

"On any channel, I have a conversational assistant that understands me and resolves my questions and requests."

CSPs can enhance customer trust and service experience by using AI agents to engage in human-like fluid, intelligent conversational flows, as opposed to chatbots with fixed conversational flows. These intelligent AI agents, equipped with company-specific data and rich customer context can manage meaningful responses to a diverse range of questions and prompts.

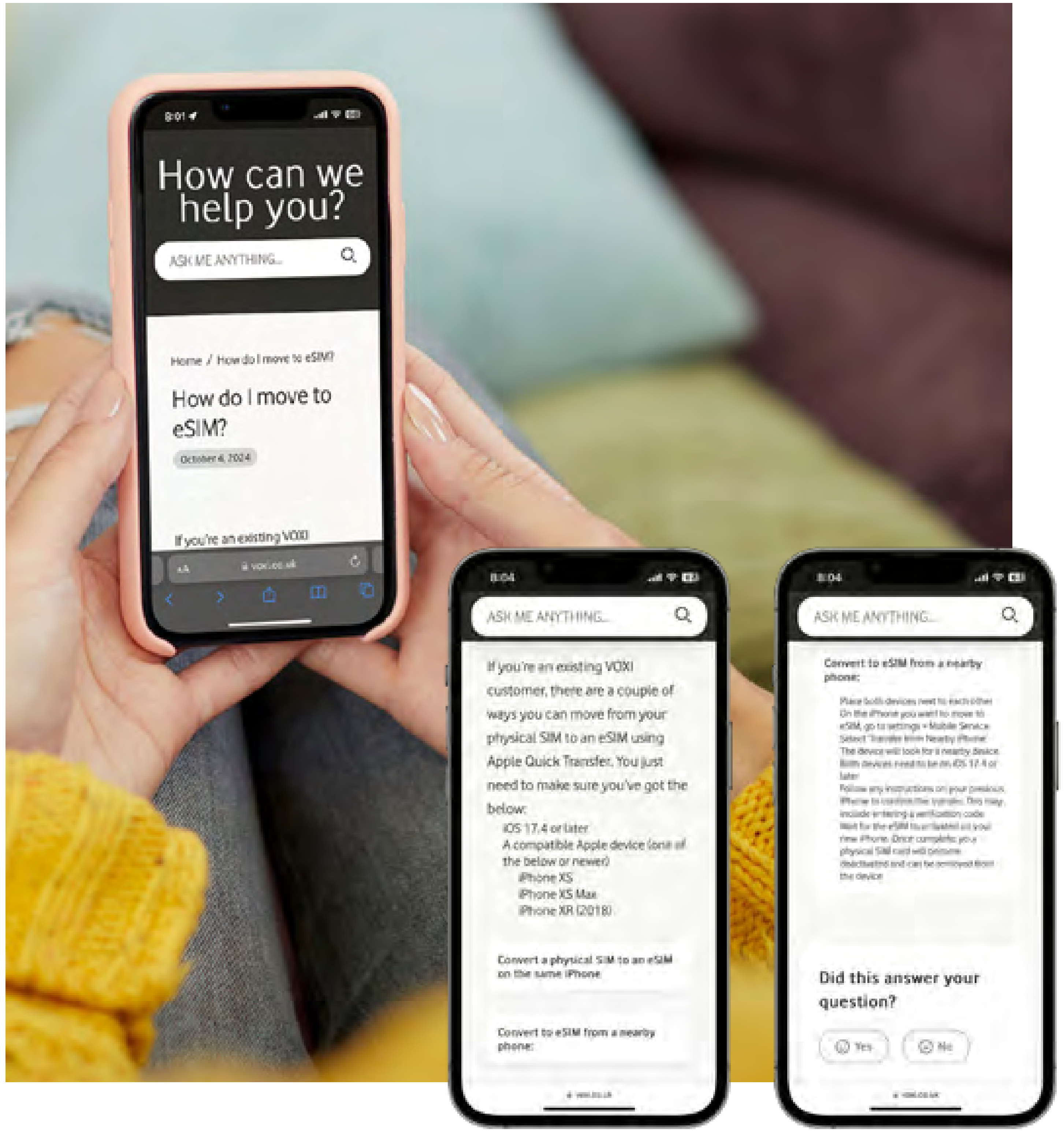
Enabling Service-Driven Growth

"My company rewards my loyalty as a customer with the best recommendations and offers."

The collaboration between customers, gen AI agents and human agents unlocks new levels of understanding and growth. AI-powered systems can enable CSPs to prioritize building deeper customer relationships, uncovering opportunities for upselling and cross-selling services. This strategic partnership, powered by real-time recommendations derived from customer context and knowledge management, boosts customer interaction, identifies growth opportunities and proactively addresses retention challenges for customers at risk of churn. As a result, it cultivates a more loyal customer base, driving the organization's growth and long-term success.

Reinventing the customer experience to function as illustrated above requires CSPs to address internal challenges. One significant barrier is the fragmentation of customer journey responsibilities across siloed departments such as marketing, sales and service, as well as across channels like retail, digital platforms and call centers. This division often leads to inconsistent customer experiences and hampers the ability to provide unified support.

CSPs must dismantle these silos and foster integration among marketing, product definition, sales and service functions. All teams must work towards common customer loyalty success metrics, facilitating a cohesive customer journey. Implementing cloud technologies and scaling generative AI are essential steps in integrating diverse technological applications, thereby supporting customer growth and enabling personalized, efficient customer interactions.



Vodafone's Voxi Mobile implementation of generative AI shows how integrating and analyzing data from all customer touchpoints can enhance customer experience. By leveraging AI, Vodafone delivers real-time, personalized interactions across various channels, including its conversational assistant.

Reinventing customer service with gen AI: How Vodafone is using a new conversational voice solution to transform customer service for its youth brand VOXI Mobile.

VOXI Mobile (VOXI), the mobile offering created by Vodafone for people aged 18-29, wanted to ensure that its customer service matched the dynamic language and expectations of Gen Z. VOXI Mobile's previous chatbot sometimes struggled to understand questions and handle multiple queries. This is a common issue with traditional chatbots that require questions to include predefined words or phrases they've been programmed to understand.

Accenture stepped in to assist VOXI Mobile in creating a new conversational voice solution powered by gen AI and large language models (LLMs). The aim was to ensure that consumer interactions are more human-like, engaging and efficient. The development process, which took about three months, involved multiple iterations to refine the chatbot's functionality and user interface. The new conversational agent, built on Microsoft's Azure AI Studio and the Azure OpenAI LLM framework, was designed to understand context, handle multiple queries simultaneously and transfer to human agents seamlessly when needed. It had robust AI safety and guardrails in place, ensuring that discussions remained focused on Vodafone-related topics. These guardrails also ensured that inappropriate input and output was blocked to prevent misinformation and safeguard the customer's personal information.

The new conversational gen AI agent significantly enhanced the customer experience by providing quicker and more accurate responses, thereby reducing the need for human agent intervention. This led to increased containment rates and reduced average handling times for customer queries. The chatbot's success not only improved operational efficiency but also set a new standard in customer service within the UK telecom industry, supporting Vodafone's goal to lead in customer experience.

The way forward

CSPs have a unique opportunity to deliver exceptional customer experiences, but to achieve this, they must reinvent themselves—on both technological and operational fronts.

The key to **technological reinvention** is to integrate platforms that enable seamless communication and data-sharing between sales, marketing and service functions across three layers: data foundation, gen AI orchestration and the user layer.

Start by scaling the data foundation layer—consolidating and integrating customer data from all sources—whether structured or unstructured. This includes information across digital sources, customer calls, emails and from systems like customer relationship management and network platforms. By creating a single "virtualized brain," CSPs can ensure that all information is accessible in real time and organized under a standardized data products framework—enabling faster, more accurate decision-making at any customer touchpoint.

Next, put gen AI capabilities at the core of all customer-facing products to make all customer offerings more dynamic. Real-time orchestration should span everything from product catalog and pricing and to delivery and assurance. Build future-ready large language models for metadata, storage and access management across the full-scale B2C business organization. Complement this with specialized language models pre-trained on historical customer interactions to increase response speed and accuracy and to reduce operational cloud costs.

Finally, modernize the contact center. Migrate to the cloud and incorporate strategic AI and gen AI capabilities. Empower agents with customer context to solve any customer request, recommend best next actions and value offers. This will enable real-time, hyper-contextualized conversations and reduce any repeatable call or transfer between agents.

Also, invest in a microservice-based architecture for intelligent business support systems (BSS) and open digital platforms. Leverage application programming interfaces (APIs) to abstract services and decouple customer information between the experience platform and backend applications (BSS/OSS).

On the operational front, CSPs need to reinvent their operating model. It's critical to rethink models for accountability and data management. Move away from specialized, function-specific agents to customer agent systems that collaborate among themselves to integrate the management of the customer experience. This approach combines front- and back-office functions to boost productivity, streamline back-office processes, and ensure accountability. The goal is for the initial contact person to take full responsibility for resolving any issue end-to-end. By doing so, CSPs will eliminate silos and establish ownership of the customer experience. This transformation will be driven by maximizing access to information about customer needs—context, requirements, and recommendations—which will, in turn, facilitate the scaling of AI and gen AI capabilities to further empower agents.

Establish cross-functional teams based on universal agents for overseeing the entire customer experience. These teams should be driven by shared goals and key performance indicators (KPIs) and supported by a centralized business structure that can quickly address customer needs.

02 Innovate and integrate relevant digital services to become customers' digital advisor

Imagine:
A customer relies on wearables and home health monitors to track her retired father's well-being. Thanks to the bundled health services provided by her CSP—including remote diagnostics, telemedicine and personalized checkups—all his devices are connected through a simple interface. One night, the father's wearable detects irregular heart activity, triggering the CSP's AI-powered health platform, which checks his health history and behavior patterns. Within minutes, his telemedicine provider contacts him, scheduling a virtual consultation with his doctor. As the situation unfolds, the customer receives real-time notifications. The doctor prescribes a new medication, which is delivered that night. By morning, her father's health has stabilized, and he never even left his home. And the customer, sitting in another city, breathes a sigh of relief.

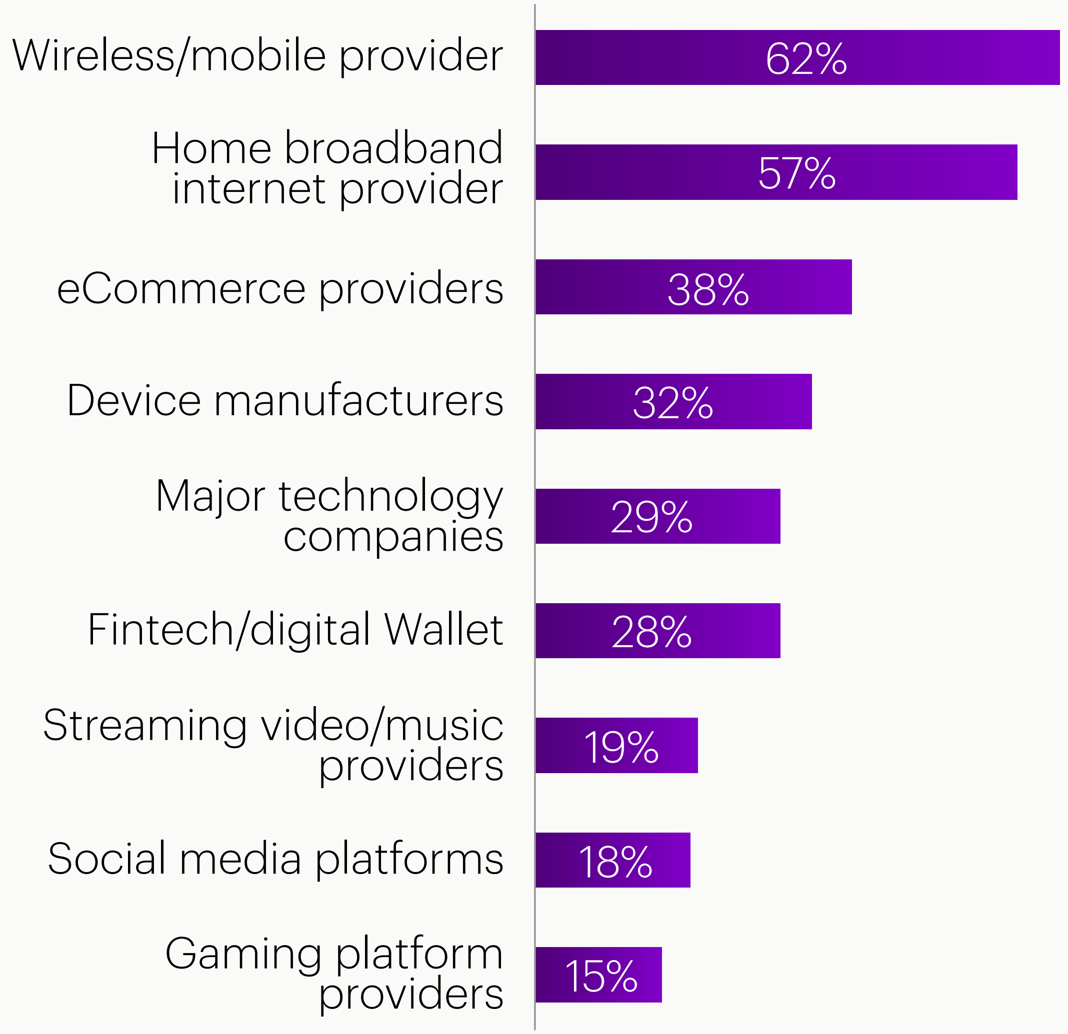
This is the kind of engagement customers already expect, and that CSPs could enable soon if they scale their supporting technologies and data access quickly. Because customers already have high trust in telcos to handle their data securely, CSPs can naturally move into the role of a trusted digital advisor. With the right engagement strategy, CSPs can anticipate their customers' needs and seamlessly offer and recommend services for continued convenience and engagement. And consumer desire for service aggregation presents an opportunity for CSPs to reimagine how they can assist customers beyond traditional connectivity or media offerings.

Are there others in this space? Why shouldn't customers turn to an e-commerce provider or a device manufacturer for these offerings? Because as our research confirms, customers prefer CSPs (see Figure 7).

With countless touchpoints across their customer base, CSPs are well-positioned to deliver an integrated digital experience, offering complementary services such as digital health, gaming and many other digital lifestyle services. Consumer brains have already adapted to a new human-to-machine interaction paradigm. We no longer simply tell computers what to do. Instead, we communicate our desired outcome. High customer expectations present an endless canvas of possibilities, but also challenges, as CSPs will need to consider beyond surface needs to deeper customer intent.

Multi-agent AI systems can also help meet evolving expectations. Specialized agents can work together to help the consumer make decisions in various areas like finance, home security and managing children's digital use. These agents will play a crucial role in bridging different services and systems—intermediating and aggregating multiple services like OTT, Music and Health/Fitness subscription models under one easy-to-use umbrella.

Figure 7:
Top three service providers preferred for bundled digital services[14]



To date, CSPs have explored various tactical and capital intensive models to increase consumer engagement by rendering adjacant and new services wrapped with their core connectivity services

FROM	TO	TO
Strategic service aggregation model	**Service build model**	**Service orchestrator model**
Focus: Subscribers	**Focus:** ARPU	**Focus:** Increasing consumer reach and engagement
Method: Aggregating partner services with core telco services.	**Method:** Building adjacent and/or digital services in-house	**Method:** An ecosystem of core, adjacent & new services onboarded on the CSP's horizontal platform, positioning the CSP as a daily digital companion for the consumer
Drawbacks: The digital identity and data ownership of the customer does not always reside with the CSP.	**Drawbacks:** This is an asset-heavy model, requiring capex to vertically integrate services, subsidize customer premise equipment (CPE) and acquire content.	

The core concept of the service orchestrator model lies in creating value through a "platform DNA." This DNA leverages key control points—critical interaction moments between CSPs and their customers—to continuously collect, correlate and monetize customer data and preferences. By using this consumer intelligence to identify relevant services & partners, and onboarding & delivering these services seamlessly on its horizontal platform, the CSP is able to increase consumer engagement. This way, the CSP retains control over consumer data and identity (thus keeping customer trust intact) while combining their traditional services with new offerings from ecosystem partners that provide some of the adjacent and new digital services, for example, a digital health and wellness service provider (without incurring excessive capex).

"I value brands that not only provide tools for immediate use but also invest in innovation and customer feedback to improve their offerings over time."

Thato, 30, from Life Trends, responded to our survey question: 'In which areas do you expect brands to offer more innovative or quicker solutions?'

Source: Life Trends survey

As CSPs mature as aservice orchestrators they would also have the ability to monetize the large amount consumer data they have collected across their core and ecosystem services

The way forward

To effectively deploy the service orchestrator model, CSPs must focus on developing a platform DNA—an integrated approach that aligns the business model, operating model and technology stack.

On the business side, use customer data collected at customer interaction points to understand customer preferences and build relationships. Use this knowledge not only to enhance your core product—connectivity—but also to create and deploy high-engagement products.

For this, seek strategic partnerships with companies from industries as diverse as home automation, health, smart energy and gaming. Continue to mobilize and incentivize these partners to create a positive cycle of continuous innovation and ensure the creation of new value streams.

Finally, implement a comprehensive loyalty program to retain customers and encourage them to engage with a wider range of digital lifestyle products.

On the technology front, build an API and microservices-driven platform architecture that supports common "horizontal" services (like user authentication, fulfilment, assurance and security) and vertical products. This will make it easy for customers to access and adopt new services.

A route forward to the platform architecture will involve heavy use of AI in 2 dimensions:

- **Leverage AI to redesign** the architecture, driving down effort by 20-30%, and in parallel,
- **Use AI as an agent** to prompt and extract from the old systems what is needed to enable the new. Resulting in the next generation of decoupling.

For the operating model, launch digital innovation hubs within your organization to ideate, incubate and industrialize new products. These units can drive experimentation and fast-track the development of new services. Next, restructure KPIs and organizational frameworks to adopt a more platform-centric approach. This ensures that performance metrics are aligned with the success of ecosystem-based services.

Finally, reassess your hiring needs—hire for roles that have a direct influence on customer experience and innovation. These include product managers, ecosystem managers and data scientists. This will be instrumental in breaking down silos and establishing a new governance structure that aligns core connectivity services with new digital offerings.

Where loyalty leads

Conclusion

Telcos are at a critical juncture. Contrary to the industry consensus, and despite years of commoditization, the B2C market still represents a large opportunity that, with the right approach, can fuel significant growth. Success lies in shifting the narrative away from being low-margin utilities to becoming trusted digital advisors who are deeply integrated into their customers' daily lives.

Communications service providers must move beyond fragmented experiences and harness their data to deliver tailored, engaging services that go far beyond basic connectivity. This will require a significant investment in their AI and data maturity and overall tech stack.

But technology cannot solve the challenge alone. The ambition to fuel a resurgence in B2C revenue growth also calls for new business and operating models. Only then can telcos deliver the deep changes in customer engagement and customer experience that are needed to turn the trust advantage into platform for loyalty.

The tools are there, the demand is growing—
now the question is, are telcos prepared to act?

About the research

Our multi-method research approach integrates a primary survey, expert interviews and case studies, enriched further by industry-related insights from the Accenture report 'Accenture Life Trends 2025'.

Primary survey
We rolled out the survey to 6,800 consumers across 15 countries to assess the perspectives and experiences of consumers with telecom services, focusing on mobile/wireless providers and home broadband providers.

The survey aimed to

- Assess the overall customer satisfaction and challenges faced in daily interactions with telecom service providers
- Discover the level of trust consumers place in their telecom provider as well other providers they engage with
- Evaluate consumer preferences and expectations on experience, customer support and channels
- Guage consumers' interest in buying digital services beyond connectivity from telecom versus other providers

Expert interviews

We interviewed Accenture leaders to evaluate how clients are reinventing customer experience and enhancing engagement with consumers.

Case studies

To complement our survey findings, we gathered case studies of companies that Accenture helped with enhancing customer experience and engagement. These case studies illustrate the transformative impact of technological reinvention on business and critical factors for a successful transformation.

Additional analyses:

Global telco strategies over the last 12 months (figure 3): Using Accenture Research's in-house gen AI tool, we examined the strategies of top 25 global telcos over one year (July 2023-24). The tool analyzed earnings call transcripts, press releases and other publicly available information and organized the results by key categories/dimensions of strategies to analyze. We then calculated the percentage of telcos which cited these strategies publicly in the period under consideration.

Correlation between recommendation ratio and revenue performance (figure 4): We evaluated the relationship of recommendation ratio and revenue growth for eight industries, using a selected number of US companies in each industry. The correlation coefficient value is 86%, shows strong positive correlation between two variables, analyzing them in an isolated way. "Recommendation Ratio" is sourced from YouGov Database on consumer research and is calculated as = count of brand recommended/ (count of brand recommended + count of brand avoided).

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2 Accenture research analysis (refer details in 'About the research')

3 Accenture CSP Consumer Survey, N=6,800

4 Accenture research analysis (refer details in 'About the research')

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About us

About Accenture

Accenture is a leading global professional services company that helps the world's leading businesses, governments and other organizations build their digital core, optimize their operations, accelerate revenue growth and enhance citizen services—creating tangible value at speed and scale. We are a talent- and innovation-led company with approximately 799,000 people serving clients in more than 120 countries. Technology is at the core of change today, and we are one of the world's leaders in helping drive that change, with strong ecosystem relationships. We combine our strength in technology and leadership in cloud, data and AI with unmatched industry experience, functional expertise and global delivery capability. Our broad range of services, solutions and assets across Strategy & Consulting, Technology, Operations, Industry X and Song, together with our culture of shared success and commitment to creating 360° value, enable us to help our clients reinvent and build trusted, lasting relationships. We measure our success by the 360° value we create for our clients, each other, our shareholders, partners and communities.

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About Accenture Research

Accenture Research shapes trends and creates data-driven insights about the most pressing issues global organisations face. Combining the power of innovative research techniques with a deep understanding of our clients' industries, our team of 300 researchers and analysts spans 20 countries and publishes hundreds of reports, articles and points of view every year. Our thought-provoking research—supported by proprietary data and partnerships with leading organisations such as MIT and Harvard—guides our innovations and allows us to transform theories and fresh ideas into real-world solutions for our clients.

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