

# THE ROAD TO DIGITAL

How telco operators are walking the road to digital so far and how they are adapting for 2021 and beyond to create value, enhance topline growth and achieve quick wins in their digitalization journeys.

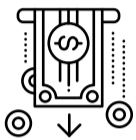
## TELCOS EMBRACING DIGITAL TRANSFORMATION

**65%** Already have digital strategy roadmaps (And 35% have not)

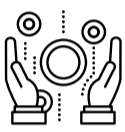
**1 in 4** MNOs have KPIs to measure success

**74%** Plan to increase investments

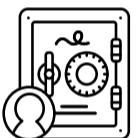
## CREATING DIGITAL VALUE



**66%**  
See **cost reduction** as key benefit

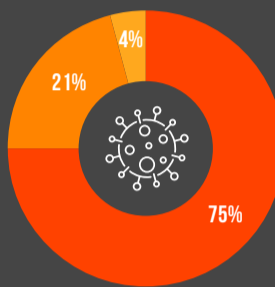


**73%**  
See **integration with existing channels** as top challenge



**#2 CONCERN**  
**Privacy & data**

## IMPACT OF COVID-19 ON THE DIGITAL TRANSFORMATION JOURNEYS OF TELCO OPERATORS



COVID WILL:

**75%** Expedite our digital transformation journeys

**21%** Have little or no impact on our digital transformation journeys

**4%** Delay our digital transformation journeys

## DIGITAL SALES

**70%** Of telcos generate revenues mainly from **physical channels**

## AROUND THE WORLD

More action, less talk

**91% SWITCHED TO DIGITAL CHANNELS**

NORTH AMERICA

Always on middle ground

**50% DIGITAL - 50% PHYSICAL  
HALF STRATEGY - HALF ACTION**

EUROPE

Forward but still on the drawing board

**61% REVENUES VIA PHYSICAL CHANNELS**

APAC

LATAM

Full of surprises

**100% OF TELCOS DERIVE REVENUES MAINLY FROM PHYSICAL CHANNELS**

Low scores in strategy & action

**ONLY 1 IN 3 OPERATORS PRIORITIZED SHIFT TO DIGITAL**

ME/A