



2025 MOBILE CONSUMER SURVEY

What US Consumers Really Want From Their Mobile Provider

OXIO

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Note from Nicolas Girard, Founder and CEO of OXIO



Our latest consumer survey reveals an interesting insight into the shifting preferences of Americans in the US mobile market. While connectivity itself remains essential, consumers are increasingly drawn to new possibilities in how these services could be delivered and experienced. There's a meaningful opportunity gap between traditional models and what modern consumers say they want. And now, more than ever, consumers have options.

Our survey reveals a striking openness to change: 90% of consumers would consider alternatives to traditional carriers if those alternatives offered more customized services aligned with their preferences and lifestyles. The research shows that many consumers are looking for greater plan clarity and value—they want services that match what they actually use. We're seeing a strong interest in personalization, transparency and more control over mobile services. While current white-label MVNO solutions offer new branding options, there's an opportunity to go further in meeting these consumer preferences with truly customizable services.

It goes beyond simply rebranding mobile plans to achieve differentiation. It's about reimagining how connectivity fits into consumers' daily lives and forging relationships with brands they trust. When 75% of consumers say they'd switch providers for a more tailored experience, and half are willing to share their data in exchange for better services, they're telling us something crucial: the future of telecom isn't just about network infrastructure—it's about delivering personalized services through the channels consumers already know and trust. They're looking for simplicity, better value and the convenience of integrated services with brands they regularly use.

The market is moving toward the cloud, just as we've seen in banking, retail and media. With the advent of telecom innovations such as Telecom-as-a-Service (TaaS), brands and enterprises now can create their own distinctive telecommunications offerings with tools to craft unique experiences, leverage subscriber data, and integrate connectivity into their existing digital products and services.

The findings in this report point to exciting possibilities for the future of telecommunications. They show that consumers are ready for innovation in how they access and experience connectivity. The future presents opportunities for those who can deliver truly personalized services that meet the evolving needs of today's modern consumer. Let's embrace these possibilities together.

Nicolas Girard
Founder and CEO, OXIO



Key Findings

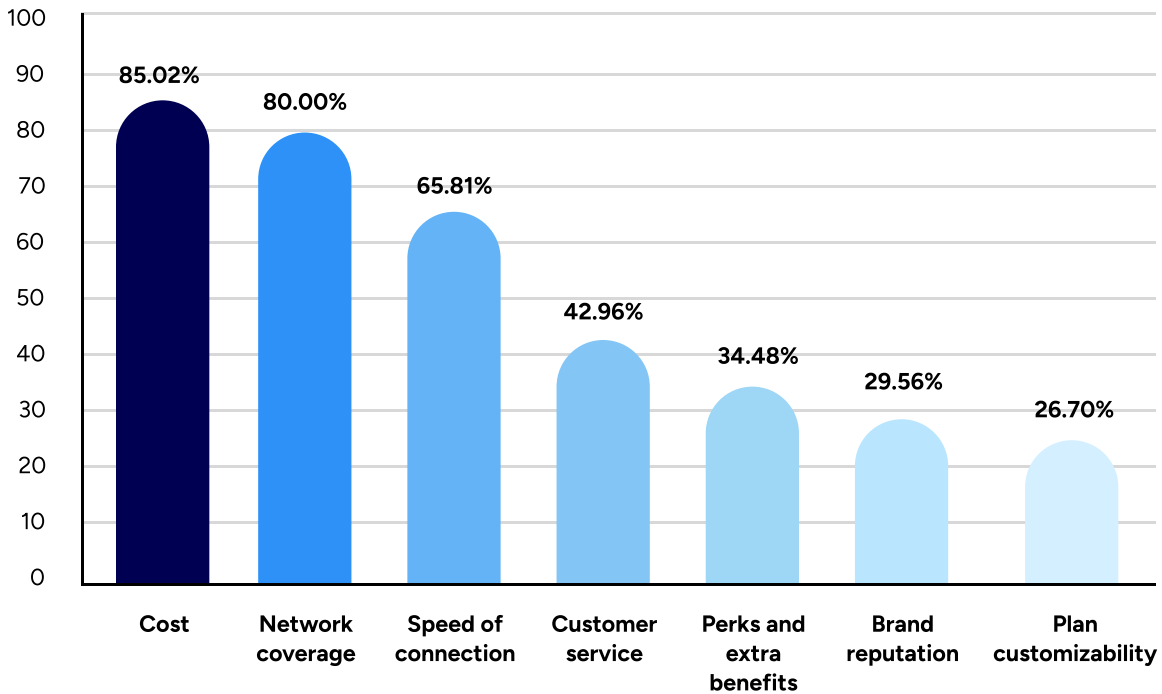
- 1** Price sensitivity dominates consumer mobile priorities, outweighing network coverage and speed of connection.
- 2** There is an overwhelming openness to alternative providers: 90.54% of consumers would consider switching to MVNOs, and 39.21% would definitely switch from major carriers.
- 3** Nearly two-thirds of consumers are interested in family plans with granular content control for children.
- 4** Over half of consumers are willing to share private data in exchange for lower cellular rates and additional discounts.
- 5** Retail and financial services emerge as preferred channels for new mobile services, indicating a shift in consumer preferences and an opportunity to create embedded connectivity experiences.
- 6** Consumers show interest in bundled and customizable mobile plans, particularly plans from a celebrity they identify with or a social cause they support.

Note: This data was collected by a well-known and regarded survey vendor during the month of October 2024. We polled over 1,000 U.S. consumers with decision-making authority over their wireless plans.

The Rise of **Price-Conscious** Mobile Consumers

Our survey findings show that cost is still the single most important factor in mobile provider selection, with 85.02% of respondents citing it as a key consideration, closely followed by network coverage, which remains an important factor. This ranks notably higher than traditional differentiators like brand reputation and customer service.

Here's the full breakdown of key factors driving US mobile consumers' plan and provider choices:



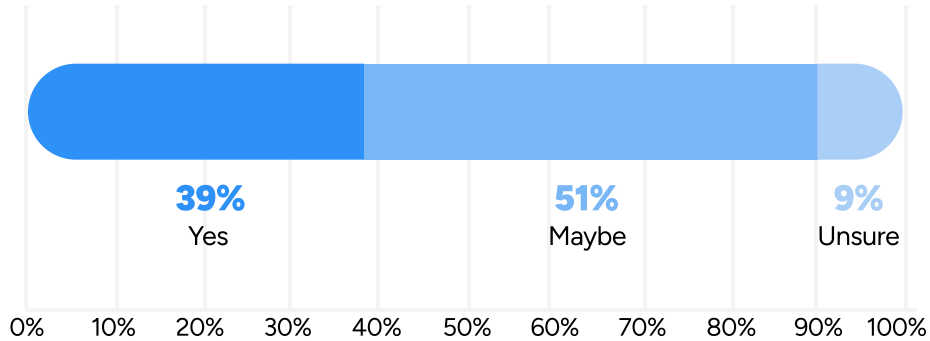
The dominance of price sensitivity is further emphasized in consumers' motivations to switch providers, with the top three primary enticements being:

<p>46.40%</p> <p>rank a lower-priced plan as their primary reason to switch</p>	<p>33.40%</p> <p>prioritize better network coverage</p>	<p>only 14.88%</p> <p>consider improved speed their primary motivation</p>
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Openness to alternative providers

Perhaps most striking is consumers' willingness to consider non-traditional mobile providers. More than 90% of consumers would consider changing mobile providers to smaller, lesser-known MVNOs.

Consumers willing to consider a switch to a mobile provider that is not AT&T, Verizon or T-Mobile:



This openness to alternative providers exists despite only 58.58% of respondents being aware that MVNOs operate on major carriers' networks.

The global context: A cost crisis in connectivity

The importance of pricing in mobile services extends far beyond individual consumer preferences. According to the [GSMA's State of Mobile Internet Connectivity 2024 report](#), 43% of the global population—approximately 3.45 billion people—still do not use mobile internet. Device affordability emerges as one of the primary barriers to adoption, particularly in lower and middle-income countries (LMICs):

- Mobile devices can cost up to 18% of average monthly wages in LMICs.
- This rises to 51% for the poorest 20% of the population.
- In Sub-Saharan Africa, device costs can reach 99% of monthly income for the poorest quintile.





Implications for the industry

While overall satisfaction for mobile providers is relatively high at just over 75%, loyalty appears fragile. Our survey reveals a paradox: satisfied customers would readily switch for better deals, especially those offering customization with cost savings.

This insight reveals a crucial truth: satisfaction doesn't equal loyalty. Nearly 75% would switch to a fully customizable, cost-effective plan, suggesting carriers have built their foundation on shifting ground—customers stay not from loyalty but from lack of compelling alternatives.

The MVNO opportunity is clear, with more than 90% of consumers willing to consider alternatives to major carriers. More telling, 60% would buy mobile services from a retailer, signaling a shift in perception—mobile service is increasingly seen as an embeddable, integrated offering rather than a standalone utility.

More than 90% of US consumers would be willing to consider mobile providers outside of the three major carriers.

This is where Telecom-as-a-Service (TaaS) becomes transformative. Programmable, cloud-based telecom infrastructure enables:

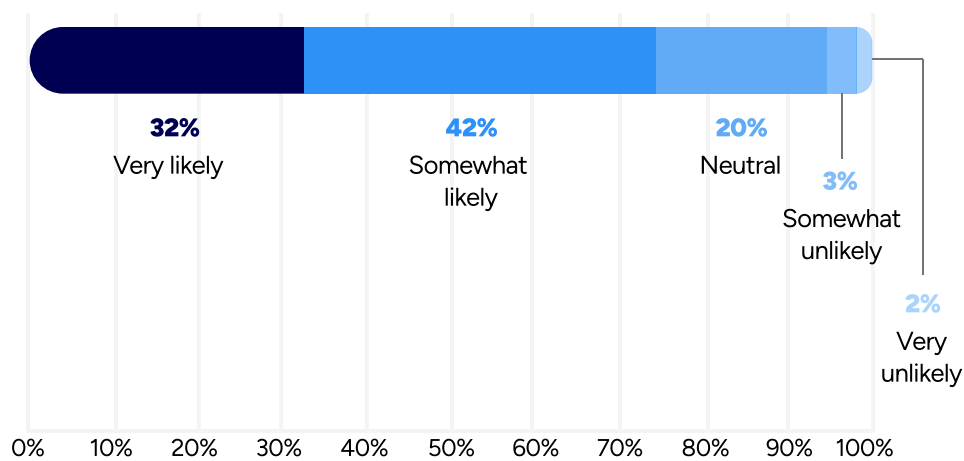
- Reduced operational costs and complexity
- Personalization at scale
- Flexible, usage-based pricing
- Integration with existing consumer experiences and relationships

The traditional telecom model's rigid approach increasingly misaligns with consumer expectations. TaaS enables a fundamental rethinking of how mobile services are packaged, sold and delivered.

Demand for **Flexible** and **Customizable** Plans

The mobile industry has long operated on standardized plans and one-size-fits-all solutions. But our survey reveals a growing consumer appetite for personalization and flexibility in mobile services, suggesting the market is ready for more innovative approaches to mobile connectivity. When asked about their interest in fully customizable plans based on individual data usage, preferences, and lifestyle, consumers showed overwhelming enthusiasm:

Consumers on how likely they'd be to switch to a mobile provider that offered this type of customizable plan:



This desire for personalization extends beyond basic plan features. Our survey found significant interest in new models of mobile service delivery, revealing a striking openness to non-traditional approaches, with nearly 60% of consumers saying they'd feel comfortable buying mobile plans from companies they regularly shop with.

44% of consumers would be willing to switch to a mobile provider that was tied to a social cause they supported or celebrity that they closely identify with.

Perhaps even more telling, 44% would be willing, while 36% are open or neutral, to switching to a mobile provider aligned with a social cause or celebrity they support, and half would share anonymized data in exchange for personalized benefits. These numbers paint a picture of consumers who increasingly view mobile services not as a utility to be purchased from traditional carriers but as a personalized experience that can reflect their values, shopping habits and lifestyle choices.



The path to personalization

The demand for personalized offerings is far from new. For years, consumers accessing varying services and products have sought tailored solutions that align with their unique needs and lifestyles. However, the telecom sector has lagged behind, clinging to a one-size-fits-all service model. This approach may explain why only 35% of our survey respondents reported being “very satisfied” with their current provider. These findings highlight a gap between consumer expectations and what traditional telecom services have delivered thus far.

While just over a quarter of consumers explicitly cite customization as important when choosing a provider, the broader data tells a more compelling story: nearly 75% would switch providers for a more tailored experience that could save them money. This shows a clear opportunity for companies to take advantage of this mindset and start building the next generation of mobile experiences that more closely align with consumers’ preferences.

This creates unprecedented opportunities for brands and service providers. Through TaaS platforms, companies can offer usage-based pricing that adapts to individual needs, seamless integration with existing customer experiences and relationships, and personalized rewards based on usage patterns. We’re witnessing the end of the one-size-fits-all era in mobile services. Today’s consumers expect the same level of personalization from their mobile provider that they receive from other digital brands—and they’re ready to switch providers to get it.

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The Untapped Potential of Family-Oriented Mobile Plans

New research on digital media's impact on child development—including Jonathan Haidt's bestseller "The Anxious Generation"—is fueling parents' concerns about mobile phone use among children. This growing awareness has created opportunities in the mobile market, with our survey revealing strong demand for family plans offering sophisticated content controls and app management features.

The numbers are compelling: 65.12% of respondents expressed interest in family mobile plans with built-in internet and app safeguards for children. Of these, 32.81% were "very interested" and 32.31% were "somewhat interested." This strong response suggests a significant unmet need in the market, particularly given that 48.08% of respondents currently include adult children or other family members on their plans.



The desire for content control extends beyond simple parental restrictions. Today's families want granular control over their mobile experience—the ability to set different access levels for different family members, manage app usage and control content exposure at the network level. This level of customization has traditionally been difficult to implement within the constraints of legacy telecom infrastructure, but cloud-based telecom platforms are changing this dynamic.

However, this push for customization and content control raises important questions about net neutrality and the future of mobile services. As providers develop more sophisticated tools for content management, they must balance family safety with open internet principles. The solution likely lies in empowering users with choice rather than implementing blanket restrictions—allowing families to make informed decisions about their mobile experiences while maintaining the fundamental principles of an open internet.

Data Privacy: A New Currency in Mobile Services

Our survey reveals a sophisticated understanding among consumers about the value of their data and a growing willingness to share it in exchange for tangible benefits. Perhaps the most striking revelation: 50.84% of consumers would consent to sharing anonymized, secure data about their mobile activity and preferences if it meant receiving additional benefits like lower-cost plans, personalized discounts or improved services. Another 23.63% would consider such an exchange, suggesting that nearly three-quarters of consumers see their data as a potential asset to unlock further savings.

Over 50% of consumers would consent to sharing anonymized, secure data on their mobile activity if it meant receiving additional benefits such as lower-cost plans, personalized discounts or improved services.

This openness to data sharing isn't unconditional, however. Consumers clearly prefer to take ownership over how their data should be used and what they expect in return. When asked about which value-added services they would pay more for, respondents consistently ranked personalized offerings higher than generic perks. Free data access to favorite apps and sites emerged as the top choice, with 46.73% ranking it as their most valued benefit. This suggests there is a clear opportunity for mobile providers to intelligently power more customer-centric product offerings that align closer to consumers' preferences.

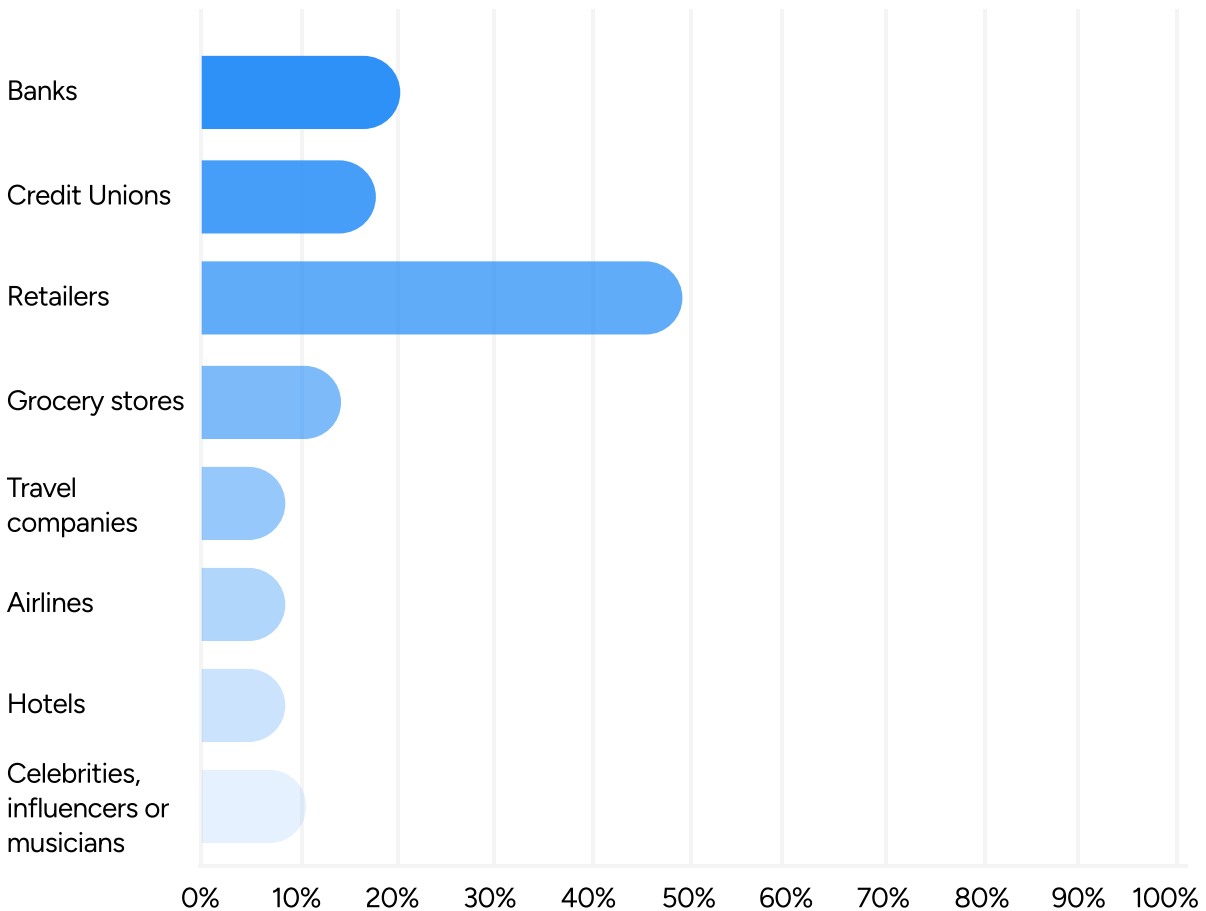
Traditional carriers are not technology companies, and are not designed to collect and translate subscriber data into meaningful value for their customers. Today's consumers expect more – they want their data to work for them, delivering cost-effective and personalized experiences that adapt to their usage patterns and lifestyles according to 75% of survey participants. This willingness and openness to sharing data shows a future for data-driven mobile connectivity models.

The Banking and Retail Revolution in Mobile Services

The future of mobile service delivery may come from a new type of carrier. Our survey indicates significant consumer interest in purchasing mobile plans from retailers or banks, should they start offering these services. This convergence of telecom and essential services, creates a natural synergy that could enhance customer retention and increase the stickiness of these combined offerings.

Retailers lead this transformation, with nearly half (49.66%) of consumers considering purchasing mobile services from retail brands. 20.79% would consider buying mobile services from their bank, with another 17.93% open to credit union offerings. These numbers signal a change in consumer mindset: mobile connectivity is increasingly viewed not as a standalone service but as a natural extension of existing consumer relationships within other everyday services.

The opportunity for retail-led and finance-led mobile offerings is growing, with consumers willing to buy their mobile phone services from:



The appeal is clear. Consumers already trust these brands and institutions with their daily transactions, whether they're shopping or managing their finances. The leap to providing mobile services isn't as dramatic as it might first appear – especially given that 59.98% of consumers say they would feel comfortable bundling mobile services with companies they regularly interact with.

The trend toward embedded connectivity is already taking shape globally. Companies like Revolut have begun to integrate mobile connectivity into their banking app, offering eSIMs to customers as an organic continuation of their financial services. This integration creates powerful new possibilities: imagine retail loyalty programs enhanced with mobile connectivity or banking apps that seamlessly manage both financial transactions and mobile data usage.

For retailers and financial institutions, now is the moment to be an early adopter in the convergence of telecom and enterprise. With the relatively new invention of TaaS platforms, these brands can now offer mobile services without the traditional overhead of telecom infrastructure or carrier lock-ins. More importantly, they can integrate connectivity in ways that enhance their core offerings – whether that's secure banking connections, enhanced shopping experiences, or loyalty programs that span both physical and digital interactions.

The implications extend far beyond the simple reselling of mobile services. When connectivity is embedded into retail and banking applications, it enables entirely new categories of services:

- Retail and banking apps that maintain connectivity even when customers exceed their data limits, ensuring consumers always have access to the most essential everyday services.
- Loyalty programs that offer personalized data rewards for shopping or banking activities.
- Access to unique mobile subscriber data that can be integrated with financial models to improve risk management and credit scoring.
- Interest-free instalment plans for lower-income banking customers to boost financial inclusion.
- International connectivity built directly into travel rewards card programs.



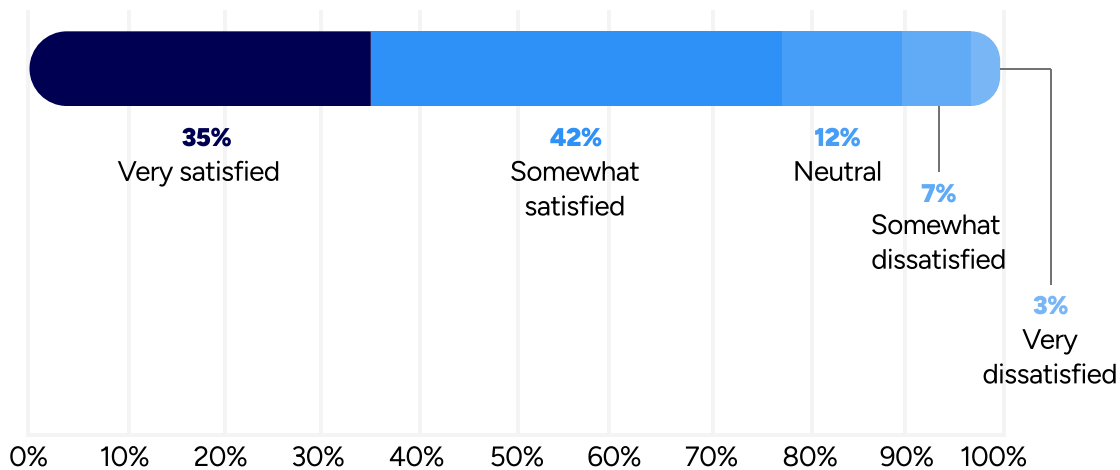
The Future of Bundled Services

Customers expressed a clear preference for bundled and integrated offerings, suggesting that they no longer require mobile connectivity as a stand alone product, and they also see the value in integrating their subscriptions with other familiar services for an easier experience.

The numbers are compelling: nearly 60% of consumers would feel comfortable buying their mobile plan from companies they regularly shop with, or bundled in with their existing service subscriptions. Whether adding mobile connectivity to an Amazon Prime subscription or integrating it into a banking app, consumers are ready for a frictionless, streamlined and convenient approach.

But this isn't just about convenience – it's about creating deeper, more valuable customer relationships. When mobile connectivity is thoughtfully integrated into existing services, it creates opportunities for enhanced customer experiences that wouldn't be possible otherwise. Consider the possibilities: retail apps that maintain connectivity regardless of data limits, banking services with guaranteed secure connections, or travel apps that seamlessly handle international roaming.

Consumers' level of satisfaction with their current mobile provider in terms of cost and features:



The implications for customer loyalty are profound. Traditional mobile providers have struggled to build deep customer loyalty – our survey shows that while 77.63% of consumers report satisfaction with their current provider, 74.80% would switch for a better deal. However, when mobile connectivity is bundled with services that already command strong customer loyalty, it becomes part of a more sticky, valuable relationship.



Implications for the **Mobile Industry**

Traditional carrier dominance faces potential opposition as consumers show strong interest in alternative service providers. While carriers maintain high customer satisfaction rates on paper – with over three-quarters of consumers reporting satisfaction with their current provider – this satisfaction appears increasingly fragile. When presented with alternatives that offer greater customization, better pricing, or more integrated services, consumers show remarkable willingness to switch. The fact that 90% of consumers would consider non-traditional providers suggests that the industry's traditional foundations are far less stable than they appear.

This disruption creates unprecedented opportunities for new entrants and innovative service models. Our survey shows consumers are ready for change across multiple dimensions: they want more control over their plans, they're willing to share data in exchange for personalization, they're eager for family-oriented features, and they're increasingly open to buying mobile services from brands they trust in other contexts.

The future belongs to customizable, embedded experiences that adapt to individual needs and integrate seamlessly with other digital services. For companies willing to embrace this change – whether they're traditional carriers, MVNOs, or brands from entirely different industries – the opportunities are enormous. The question is no longer whether the mobile industry will transform but who will lead that transformation.

About OXIO

OXIO is building the global network of the future as the first Telecom-as-a-Service (TaaS) platform. Our technology-first approach to telecom unlocks innovation and possibility while delivering actionable insights for customer-obsessed companies competing in a data-driven world.

OXIO is headquartered in New York with offices in Mexico City and Montreal. For more information, visit www.oxio.com or head to our [LinkedIn](#).

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