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An Analysis of Consumer Trends in the Telecommunications Markets of Russia and Vietnam

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Abstract

By way of descriptive and comparative analysis, the subscriber bases and revenues of television, fixed and mobile telephony, and fixed and mobile broadband segments of the Russian and Vietnamese telecommunications markets for the period of 2015-2019 were analysed. The results of the study revealed similar global trends in the telecommunications markets of Russia and Vietnam. Fixed and mobile telephony revenues are declining, since customers prefer new communication technologies to the old ones. The television subscriber base is growing in both countries; TV revenues are increasing in the Russian market and somewhat declining in the Vietnamese telecommunications market. With further penetration of broadband, more customers are upgrading their television from Free TV to Pay TV (IPTV and OTT services). The results of the study confirmed the global consumer trends in telecommunications markets and the applicability of approaches used herein for other countries.

Introduction

The development of communication as a linking element of the digital economy has led to a variety of different communication modes. Today the consumer has a wide choice. When landline telephony is gradually losing its popularity and traditional mobile telecommunication services are receding into the background with the appearance of services such as WhatsApp, Viber, and the like, the market is gradually shifting to the Internet space with a significant range of services (Lugovskaya & Simakina, 2019^[7]). The ease of transition between not only individual mobile operators and the tariffs they offer, but also between types of communication (Internet and/or mobile), has led to the emergence of a new consumer characterised by market awareness, insistence on high standards, individualism, mobility of consumer decisions, and critical evaluation of market offers. In view of this, the development of a scientific and practical approach to analysing the process of making consumer choice and the formation of consumer reactions in the modern digital economy is relevant. The telecommunications market is a very representative example in this field as it reflects all the trends of the world economy – coronavirus pandemic, growing unemployment, reduction in the number of active business projects, general decline in economic activity – and remains the basis of the modern digital economy. At the same time, individual consumer demands will maintain their steady growth, if not multiply.

A modern consumer of telecommunication services values time most and prefers those market operators who are able to provide them with high-speed access to the service and convenience of its use (Litvinenko & Tarasova, 2020^[8]). These user attitudes set the tone for industry development.

The purpose of the study is to define trends in telecommunications customer behaviour using global industry-specific indicators. The following objectives have been set:

- to analyse the dynamics of the development of the telecommunications industry on a national scale (based on the examples of Russia and Vietnam) over the past five years;
- to search for the relationship between the changes in the structure of consumer preferences in the analysed markets;
- to compare results of the study for Russian and Vietnamese markets and define whether the approach and methodology used herein can be universal for any telecommunication market.

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