

TELECOM PROVIDERS

TELECOM PROVIDERS TOP 10:

Brand Value (US\$M)

TELEKOM/T-MOBILE	\$124,636
AT&T	\$107,032
VERIZON	\$90,494
CHINA MOBILE	\$50,315
AIRTEL	\$47,628
SPECTRUM	\$34,904
XFINITY	\$29,580
ORANGE	\$21,822
VODAFONE	\$20,141
NTT	\$19,086

DEFINITION:

The Telecom Providers category includes brands that provide mobile or fixed-line telephone, and internet services as standalone or bundled packages (along with other services, like television).

A STRENGTHENING CONNECTION/ TOP TELECOM BRANDS RETURN TO GROWTH

Category Brand Value
Year-on-Year Change

10%

Telecom Providers Top 10
Total Brand Value

\$545,637 M

Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ)

TELECOM PROVIDERS

The total value of the world's top Telecom Providers grows 10% this year as consumers get serious about value – and reward the brands that deliver it.

Content bundling, the big innovation of the early 2020s, has reached its limits. Most premium providers these days have tie-ups with streaming channels: it's nice, but no longer distinctive. (It's different when telecom providers operate their own exclusive channels, e.g. T-Mobile/Deutsche Telekom's MagentaTV, which still sets that brand apart in Europe.)

Even the smartest content plays cannot save a telecom brand if its core value proposition feels opaque – or worse, extortionately overpriced. Online backlash to pricing can be loud and sticky, inevitably pushing some customers toward MVNOs and other challenger brands. In a maturing category, top brands must have Pricing Power. Not so that they can raise rates, but so that they can fend off low-cost challengers without compromising their margins.

Pricing is not only a challenge in developed markets. First-time 4G users in developing economies can also become disillusioned by data costs in the short-form video era.

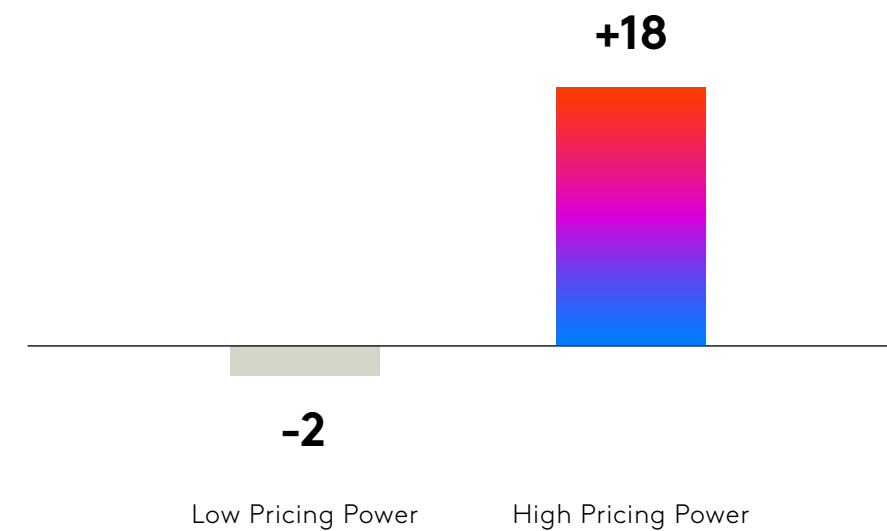
What this means is that marketing has been crucial to top brands' recent upswing. It explains why a service costs what it does, and what clients can expect for their money. When top brands slip at this task, challenger brands can gain an opening. Often, it's not just lower prices that help the startups here, but also greater perceived transparency in communications. (France's Free has succeeded on these terms, at home but also increasingly abroad.)

So where can the big brands look for growth? First, there's opportunity in satellite broadband and phone connectivity. 5G and 6G claims have often struck consumers as too abstract. By contrast, low-orbit satellite networks provide a more comprehensible and excitingly futuristic innovation claim. They also solve a clear problem by serving rural areas that traditional infrastructure fails to reach.

Second, brands can get better at using CX as a brand-building touchpoint, not just as a way to solve care or servicing problems. At a time of expanding choice, providers need Meaningfully Different experiences to shore up predisposition between plan renewals or data top-ups.

And third, brands can use signal intelligence to identify pain points in CX and paths to purchase. This will help them identify any obvious blind spots in their quests to be more present – while also potentially surfacing that one crucial insight that could lead to a new and Different innovation (in a category that needs some shaking up).

In a mature category... Pricing Power wins
Brand Value change % 2025-2026



Kantar BrandZ, Top 10 Most Valuable Telecom Providers, 2026



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Why AI is a golden ticket to boost brand trust!

Consumers are demanding better transparency in many sectors. Telcos in developing markets aren't alone, particularly in this AI-driven era of rapid, opaque change.

Yes, AI is opening up new opportunities to improve efficiency and add value. But this is also a key moment to focus on brand trust. Telcos that prioritise AI clarity and educating the customer on end-user benefits, not just techy specs and features, will outperform.

Seizing on AI as the latest buzz and littering mentions of it across your communications in the hope it will make you seem innovative is tempting. But if everyone is doing this, it probably isn't going to be very helpful or differentiating!

Instead talk about how this is the moment to clarify that your telco brand doesn't believe in AI being a totally uncapped Pandora's Box of tricks left to run rife. Talk about the benefits sure, but talk also about where human connection is still better. Demonstrate how your brand still cares about this, and the ways in which you're adopting AI in a controlled and responsible way that maintains transparency rather than undermining it.

This can zig when others are zagging – the use of trust and transparency as fuel for brand difference and advocacy. Trust that's built through proactive servicing and communications will open up better, more meaningful connections.

TELECOM PROVIDERS

BRAND SPOTLIGHT



2026 BRAND VALUE

\$107,032 M

+23% vs 2025

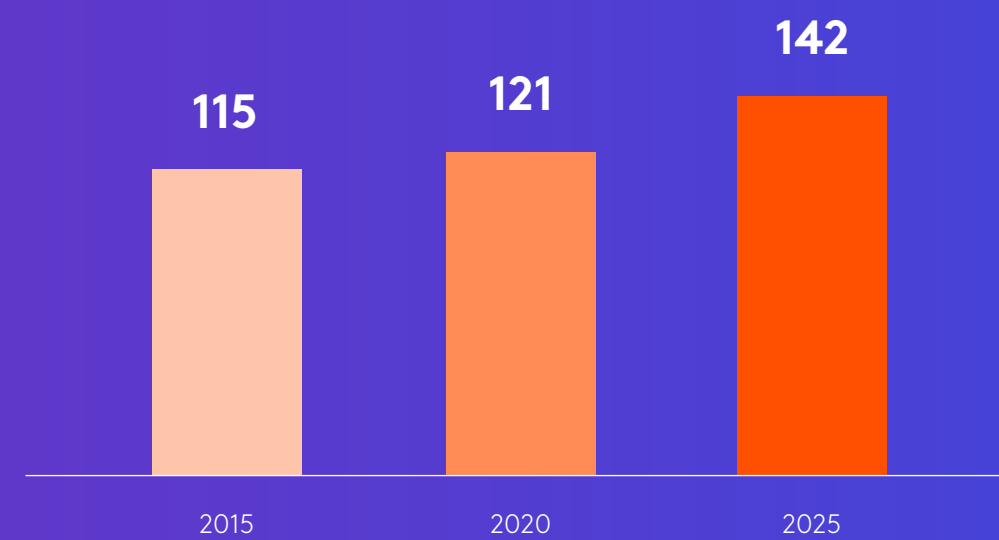
AT&T's recent success comes from a deliberate return to core connectivity. Combined with a massive investment in fibre and 5G, AT&T aims to communicate that it is focused on one job: being the best network for its users. In particular, AT&T has made trust a cornerstone of its Meaningful consumer connections, introducing the AT&T Guarantee which provides automatic bill credits for qualifying service outages. The brand also shows up consistently in important cultural moments, most notably across two decades of activations during March Madness, the US college basketball tournament.

US brand equity

■ Consumer ■ Business



Meaningful Index, US, consumers



Source: Kantar BrandZ, USA, Business Communications Providers, 2024; USA, Communications Providers, 2015-2025 (rolling 2 year data)

BRAND TO WATCH

iliad

Growing from zero to 13 million Italian subscribers since 2018, **Iliad** promises not to increase prices – ever (*‘Per Sempre’*). This sets Iliad apart from some competitors’ complex billing plans and hidden price hikes.

Future Power Index

155

Source: Kantar BrandZ, Italy, Communications Providers, 2025

IMPLICATIONS

01

BE MORE PRESENT

Many telecom brands already have strong brand equity, but need to be more present when consumers are making decisions. It’s about finding the weak points in people’s paths to purchase: are there any issues with your brand’s distribution? Visibility? Product range? From there, you can drive discovery even further by optimising for machine-led channels, e.g. search, assistants, agents, and retail algorithms.

02

DISRUPT THROUGH DIFFERENCE

Telecom challengers have succeeded against incumbent brands by finding a different way to disrupt the category – through pricing, distribution, or identifying an under-addressed pain point or grievance. Knowing people’s reasons for *not* choosing a telecom brand is vital intelligence.