

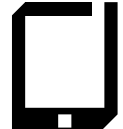
BEYOND DIGITAL: LIVING ON THE EDGE

Success in a digital + physical + human future

BRINGING IT ALL TOGETHER

Boundaries blurring between digital/physical/human worlds

More internet and platform companies are offering new services that interact with users across **3 Edge Experiences:**



DIGITAL

(screens, smart speakers, etc.)



PHYSICAL

(shops, smart appliances, cars, etc.)



HUMAN

(drivers, delivery teams, etc.)



Consumers support this development. But new research from Accenture shows that winning in the digital world does not guarantee a successful transition to the physical one. We reveal some of the main challenges facing platform companies—and what success looks like in a digital + physical + human future.

IT'S NOT ALL ABOUT DIGITAL

Successful edge experiences get the right mix

If it's just about **convenience**, digital's the vital ingredient. But it's not usually the main consideration. In many edge experiences, it's the physical or human elements that matter most.

What type of company would consumers prefer to get services from?

79% DIGITAL

Delivery of a monthly clothes selection service, where you receive and try clothes on at home

73% PHYSICAL

Ordering a product online, and picking it up at a pre-assigned locker at a nearby convenience store

74% PHYSICAL AND HUMAN

Using a voice-enabled assistant through the same company's smart speaker system

45% DIGITAL

Placing a food order online, then having it delivered to your door

60% PHYSICAL

Grocery shopping checkout in the "self-service" line

67% HUMAN

Selecting a city tour online and then experiencing it in person

46% PHYSICAL

Selecting a hotel room or other accommodation online, then at the location being greeted and oriented upon your arrival

69% HUMAN

Ordering a shared car service from an app on your phone, then riding in the car service to your destination

WE'RE ALL HUMAN

Real-world workforces must make the right impression

Whatever the digital business, the people providing its services are the brand's public face. What they do—and how they do it—really matters.

Ratings for drivers or delivery agents directly impact brand perception



People use brands less when human interactions are unsatisfactory



Positive personal interactions mean more business



GREAT EXPECTATIONS

They raised the bar for consumer expectations online. Now platform companies must match those expectations in the real world



expect more from platform companies than from their traditional competitors



would have safety concerns riding in a car provided by a platform company



wouldn't trust a social media company's home devices



Consumers welcome more opportunities to interact with digital brands...but the welcome's not open-ended

SPEAK UP!

Smartphones still rule, but demand for voice keeps on growing

Smartphones continue to rule across all age groups and in every area of activity...but over the next 12 months, voice will more than **double** as the preferred way to hail a ride.



But voice is not for everyone... two-thirds of consumers don't want always-on services at home

One thing consumers want more than anything? **63% of consumers want a single device to access all their favorite digital services**



Don't jump to conclusions A GENERATIONAL DIGITAL DIVIDE? MAYBE TIME TO THINK AGAIN

Yes, younger consumers are usually more enthusiastic about new ways to interact with experiences...but there are exceptions.



Compared to 18-25 year-olds: more 26-35 year olds want to use voice more than they do today and more of them want to use a single device for everything



If you want to learn more about the primary research, or about the services Accenture offers to help platform companies evolve their edge experiences, please contact:

ROBIN MURDOCH
robin.murdoch@accenture.com

KEVIN COLLINS
kevin.j.collins@accenture.com

MARTIN STODDART
martin.stoddart@accenture.com