Accenture Digital Consumer Survey 2016

28,000 interviews conducted across 28 countries

October–November 2015

Online population, 14–55+ years of age

1,000 respondents from each of the 28 countries

- Australia
- Brazil
- Canada
- China
- Czech Republic
- France
- Germany
- Hungary
- India
- Indonesia
- Italy
- Japan
- Mexico
- Netherlands
- Poland
- Philippines
- Romania
- Russia
- Saudi Arabia
- Slovakia
- South Africa
- South Korea
- Spain
- Sweden
- Turkey
- UAE
- UK
- USA

Male
Female

- 14 to 17 years
- 18 to 24 years
- 25 to 34 years
- 35 to 44 years
- 45 to 54 years
- 55+ years

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Italian Screenager ++
Ready for Innovation

Strategy | Consulting | Digital | Technology | Operations

High performance. Delivered.
Italian Screenager ++
Ready for Innovation

01. The Multiplier Effect
   More Consumers x More Devices x More Experiences

02. You, Me & IoT
   Smart Things Don’t Come Easy or Experiences

03. Lost in Transmission
   Minding the Gap in Privacy, Security & Service Quality

04. The Way You Make Me Feel
   Screenagers Demand More or Nothing

05. The Brand Engagement
   Quality, Simplicity & Emotional Trust
The Multiplier Effect
More Consumers x More Devices x More Experiences
The Multiplier Effect
More Consumers x More Devices...

Italian Screenagers like to use more devices at the same time when watching TV...

- **Smartphone ownership**
  - Italy: 91%
  - West EU: 77%
  - Italy: 60%
  - West EU: 49%
  - Global: 72%
  - **72%**

- **Tablet ownership**
  - Italy: 62%
  - West EU: 27%
  - Global: 23%
  - 38% for social media activities.

- **PC/Laptop ownership**
  - Italy: 38%
  - West EU: 52%
  - Global: 49%

62% of consumers who intend to buy a TV will get a Smart TV...
The Multiplier Effect
...x More Experiences

Mobile is gradually replacing TV screen and PC for accessing contents…

<table>
<thead>
<tr>
<th>Devices</th>
<th>Sport games (since 2015)</th>
<th>Tv shows, movies (since 2015)</th>
<th>Video clips (since 2015)</th>
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<td>📱</td>
<td>9%</td>
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</tbody>
</table>

…and everywhere. Screenagers are **ALWAYS ON**

- **86%** watch online movies and series on a frequent basis
- **70%** play online games on a frequent basis
- **42%** want to access digital contents outside of home and everywhere

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You, Me & IoT
Smart Things Don’t Come Easy
You, Me & IoT
Smart Things Don't Come Easy

Early adoption of Intelligent Devices is taking place...

Consumers already own at least one Intelligent Device

Top 2 services in Intelligent Devices adoption

Marginal increase in purchase intent of Intelligent Devices

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You, Me & IoT

Smart Things Don't Come Easy

...But “Smart” is not yet “easy”

60% 51%

face problems when using Intelligent Devices, down from 34 points from last year, but still far too high to make people happy

Top 3 barriers for not adopting Intelligent Devices

64% Too expensive

31% Privacy risks

29% Security concerns

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03
Lost in Transmission
Minding the Gap in Privacy, Security & Service Quality
Lost in Transmission
Minding the Gap in Privacy, Security & Service Quality

Privacy & Security

- 48% are concerned about privacy & security issues
- 64% are concerned about security during financial transactions
- 23% are concerned about shared personal data with banks
- 39% say recent hacker attacks using IoT devices will impact their use and purchase decisions
- 74% are ready to use other alternatives to avoid hacking issues
- 45% are ready to use fingerprint as alternative to username and password

Italy

West EU
Screenagers are more and more conscious and sensitive about Privacy, Security & Quality.
The Way You Make Me Feel

Screenagers Demand More or Nothing
The Way You Make Me Feel
Screenagers Demand More or Nothing

Italian screenagers are early adopters…

- 45% of Italian consumers are planning to use mobile payment
- 68% of Italian consumers use mobile apps for making/receiving calls

...But they’re waiting for the new “wow factor”:

- 42% are satisfied with their current Smartphone
- 50% are waiting for the newest and most innovative features or functionalities

Only 9% plan to increase spending on smartphones, tablets, laptops and PCs

A drop of 20 points from 29% in 2014
The Way You Make Me Feel

Screenagers Demand More or Nothing

What will encourage Screenager to purchase more products and services?

85% reliability and speed of problem resolution

84% flexibility to activate or de-activate different options

78% a large range of products and services that work well together

Innovation, customer experience and a variety of services to unlock the market
05 The Brand Engagement
Quality, Simplicity & Emotional Trust
The Brand Engagement
Quality, Simplicity & Emotional Trust

Customers still trust established brands more than disruptive digital players…

…but they need to be careful on customer experience

62% interact with communication and entertainment providers through digital channels but only 52% are satisfied

64% are ready to switch to a new provider due to poor mobile connections and viewing experience

Ensure a superior customer experience leveraging digital channels

42% prefer a telecom operator when buying home connected surveillance cameras, sensors and security system
Thank you!

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