



Strategy | Consulting | Digital | Technology | Operations

Italian Screenager ++

Ready for Innovation



High performance. Delivered.



Accenture Digital Consumer Survey 2016 - Italian report

Telecommunications, Media and Broadcasting industries are undergoing a major transformation driven by consumers who are becoming increasingly tech-savvy and at ease with the latest generation devices, demanding for more cutting-edge services.

Traditional players can keep pace with new entrants only pushing on innovative programs. According to our research, they can innovate taking advantage of their main asset: customers' trust.

In this context, the Italian consumer is particularly keen on innovation and, not surprisingly, he stands at the world's top ranking in the use of digital, and namely in "Internet of Things" connected devices.

The Italian consumer can take advantage of value-added services in a simple and multi-channel access environment: this is a great opportunity for the whole digital ecosystem players who also need to better understand the increasingly warnings on Privacy and Cyber Risk, and build-up on the Digital Trust.



Italian Screenager⁺⁺

Ready for Innovation

Digital's everywhere. Hyper-connected, embedded, increasingly intelligent: in short, consumers can't imagine a life without it. The new digital lifestyle covers all age groups. It's multi-screen, multi-function and multi-device, and it's shaping a new world of experiences.

Here we are, the Screenager⁺⁺. Our screen-centric devices have become appendages we cannot live without, as hyper-accelerated growth has amplified our dependency on real-time consumption, constant connectivity and an ever-expanding universe of expectations.

The Italian screenagers love and enjoy digital experiences, they still trust established brands but they are ready to switch providers if quality and/or usability don't measure up.

Also Screenagers are becoming more demanding in terms of service quality, which can open to new opportunities for all entertainment and communication providers. Providers need to leverage new technologies focused on safety and privacy in order to achieve high performance.

Screenagers are now power players in a multi-billion-dollar game. The stakes are rising as communications, media and technology companies scramble to deliver the next 'big thing' to keep their customers engaged. To avoid being left in the digital dust, enterprises need both a profound understanding of what their customers want and the expertise to deliver a safe and unique brand experience, a clear value proposition and user interaction that meets – or exceeds – those expectations. The winners will create and sustain strong, emotional trust.



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

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Quality, Simplicity & Emotional Trust

01

The Multiplier Effect

More Consumers x More Devices x More Experiences

Everywhere you look, eyes are angled down and aglow in the light of a smartphone, smartwatch, tablet or other digital screen. Screenagers not only own more devices, they own multiple types of devices.

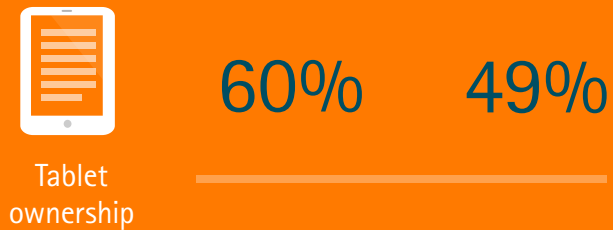
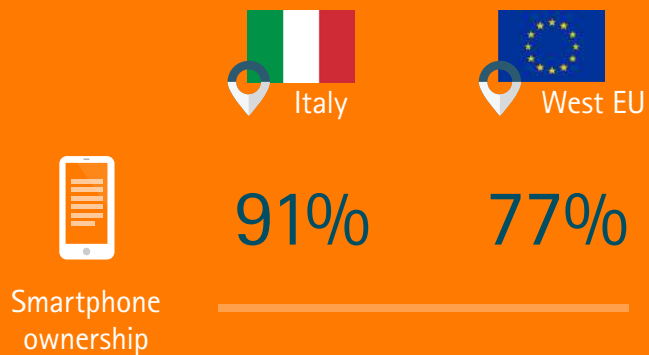
From connecting and consuming digital content—watching video, playing games and posting pictures on social media—the Screen Age has redefined the new normal and Italian consumers want to be always-connected and everywhere.

This is the Multiplier Effect in action.



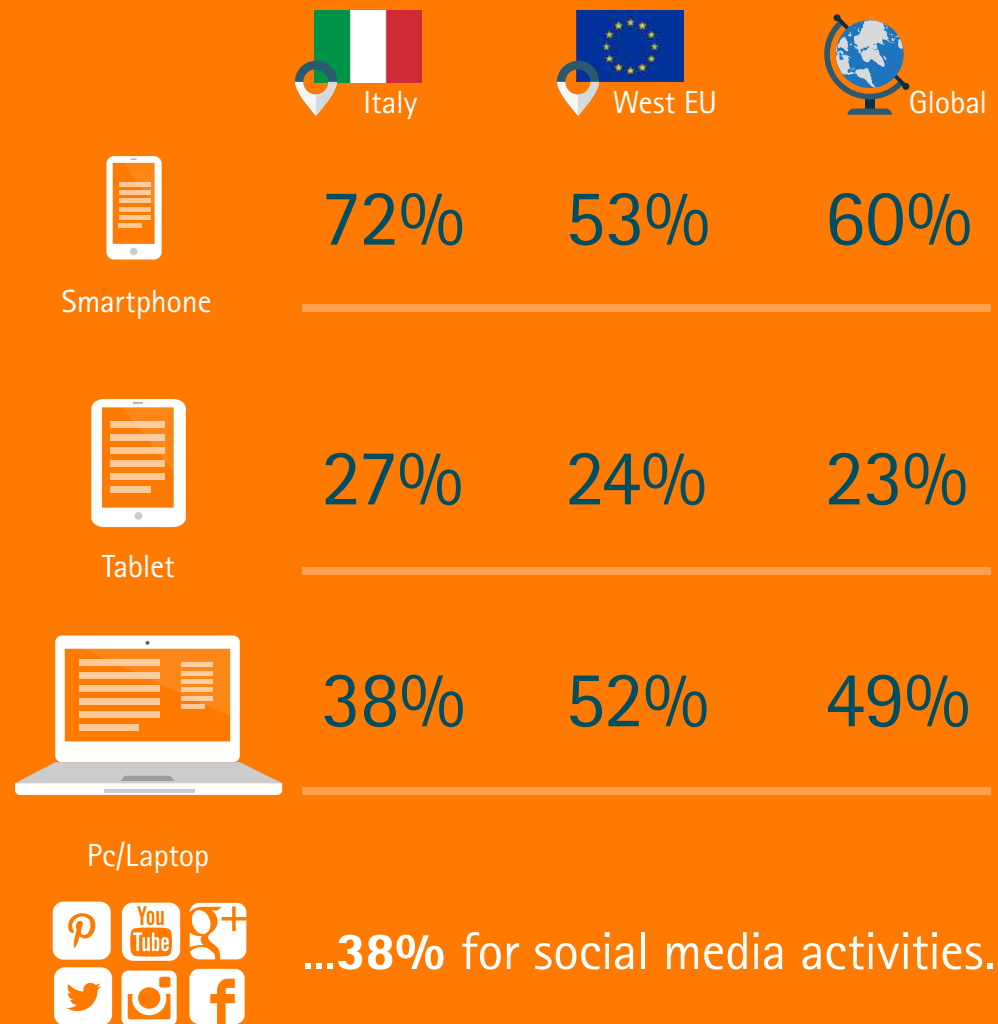
The Multiplier Effect

More Consumers x More Devices...



62%
of consumers who intend
to buy a TV will get a Smart TV





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




The Multiplier Effect

...x More Experiences

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

Devices	Sport games (since 2015)	Tv shows, movies (since 2015)	Video clips (since 2015)
	9% +4	11% +5	19% +7
	7% +4	7% +2	30% +5
	19% +9	30% +14	42% +6
	19% -11	24% -13	9% -2

...and everywhere.

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

Screenagers are **ALWAYS ON**

02

You, Me & IoT

Smart Things Don't Come Easy

You turn on your house lights and adjust the temperature from miles away. As you head home, your refrigerator reminds you to stop and buy milk. Then your car plots the fastest route to avoid rush hour traffic and construction zones. When you arrive safely home you watch as a drone delivers a package to your front door. The future has never been closer and is full of promises.

Intelligent Devices adoption in Italy is increasing year over year, but more than half are facing problems in usage, still far too high to make people happy.

Fitness wearables and smart home appliances are the most wanted devices: these may be "smart", but most are not easy to use and don't offer clear services.

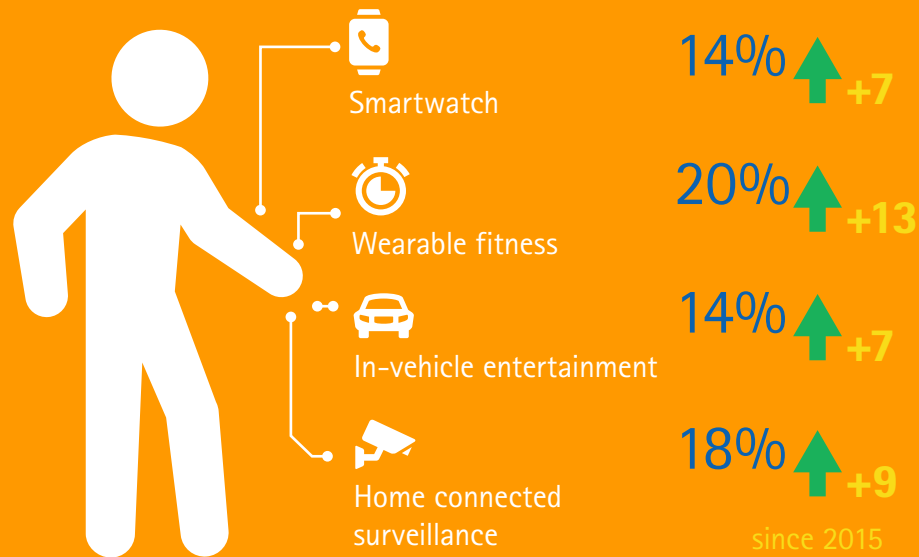
Moreover, the real barriers remain that the Intelligent Devices are still too expensive and let a perception of low security and privacy.



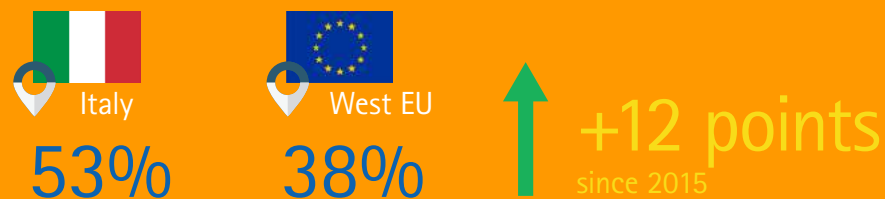
You, Me & IoT

Smart Things Don't Come Easy

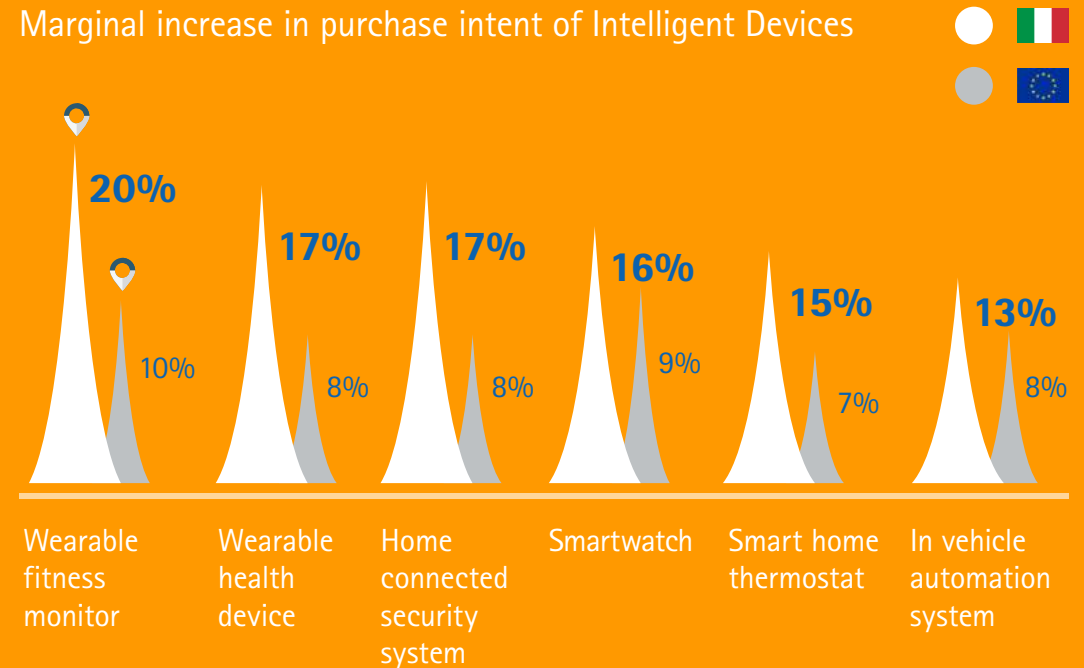
Early adoption of Intelligent Devices is taking place...



Consumers already own at least one Intelligent Devices



Marginal increase in purchase intent of Intelligent Devices



Top 2 services in Intelligent Devices adoption



Fitness and health devices
40%

use them to gather information on health and fitness status based on workout and physical condition



Smart Home
37%

use them to get notifications if a fire or other issue arises while they are away from their home

You, Me & IoT

Smart Things Don't Come Easy

...But "Smart" is not yet "easy"

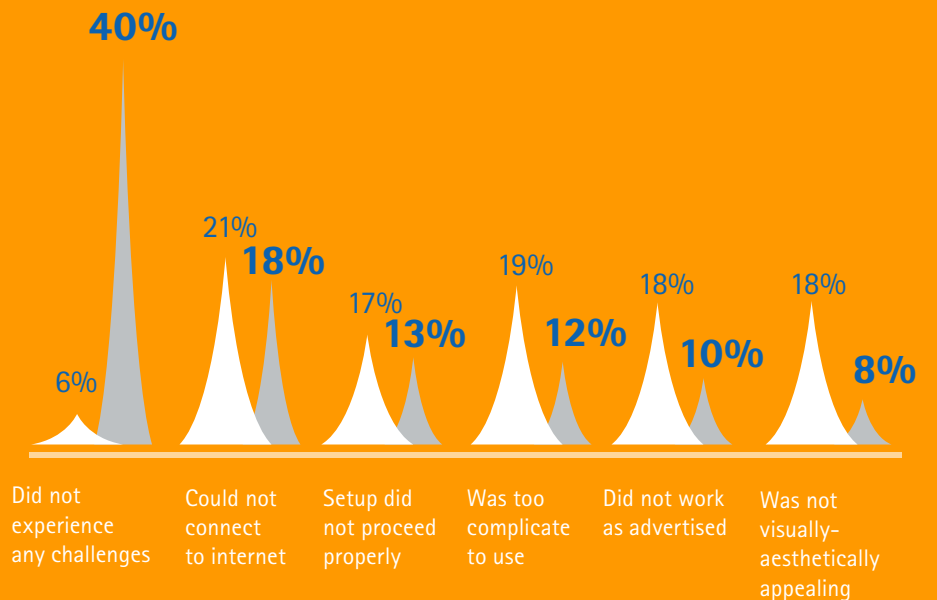


60% 51%

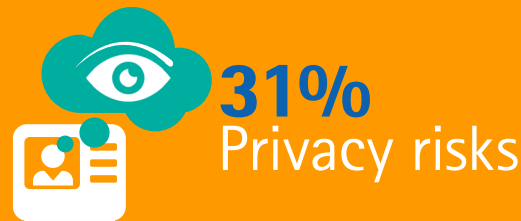
face problems when using Intelligent Devices, down from 34 points from last year, but still far too high to make people happy

Intelligent Devices: major challenges for at least one Intelligent Devices owners

● 2015 ● 2016



Top 3 barriers for not adopting Intelligent Devices



03

Lost in Transmission

Minding the Gap in Privacy, Security
& Service Quality

The life of a screenager is characterized by intensity and immediacy. Their digital experiences need to be agile and real-time—smooth and safe. Nothing less will do.

Italian consumers are concerned about privacy and security issues more than other European countries: the biggest concerns include online financial transactions and online banking. Anyway screenagers are ready to use alternatives in order to avoid hacking issues.



Lost in Transmission

Minding the Gap in Privacy, Security & Service Quality

Privacy & Security



Italy



West EU



48%

56%

are concerned about **privacy & security issues**



64%

58%

are concerned about **security during financial transactions**



23%

33%

are concerned about **shared personal data with banks**



39%

36%

say recent **hacker attacks** using IoT devices **will impact their use** and purchase decisions



74%

53%

are **ready to use other alternatives** to avoid hacking issues



45%

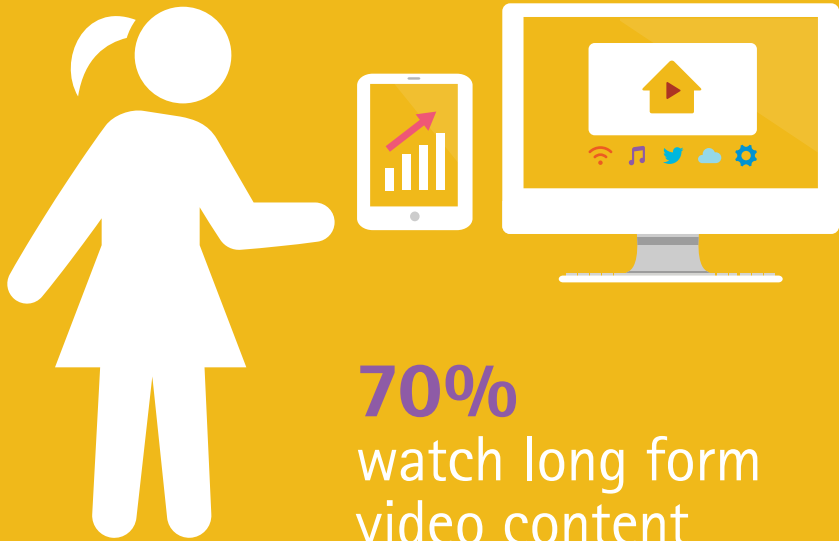
35%

are **ready to use fingerprint** as alternative to username and password

Lost in Transmission

Minding the Gap in Privacy, Security & Service Quality

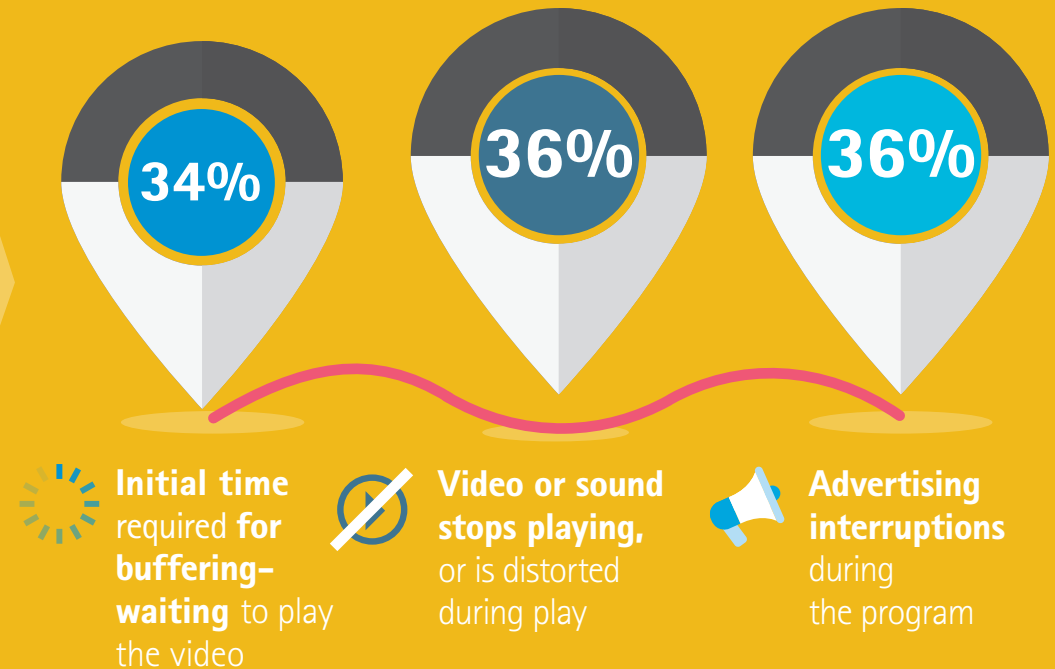
Service Quality



70%
watch long form
video content
over the internet
on any screen

Top 3 concerns

for consumers while watching online video



Screenagers are **more and more conscious** and sensitive about **Privacy, Security & Quality**



04

The Way You Make Me Feel

Screenagers Demand More or Nothing

As screenagers become more mature, sophisticated and selective, their wallets won't open without good reason. Italian Screenagers are early adopters. Nearly half are planning to use mobile payment services, more than the average in Europe (29%) and 12% already do it regularly. 68% prefer to use mobile apps for making/receiving calls.

Although the next big thing is not here yet, the smart players are working hard to get it—whatever it will be—in front of screenagers before their competition does.

Indeed the intention to increase spending on devices has declined with a drop of 20 points compared to 2014. Attention is now focused on new and innovative services.

The Way You Make Me Feel

Screenagers Demand More or Nothing

Italian screenagers are **early adopters**...



are planning to **use mobile payment**

+16 points
than the average in Europe



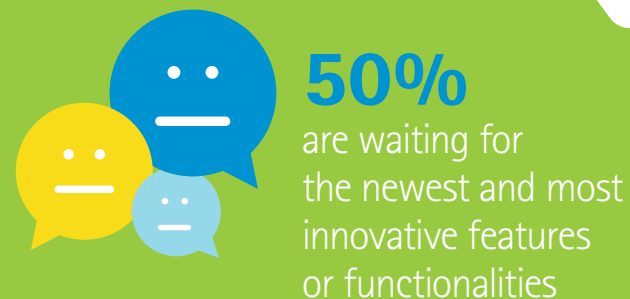
consumers use mobile **apps**
for **making/receiving calls**

Only 9%

plan to increase spending on smartphones, tablets, laptops and PCs

A drop of 20 points
from 29% in 2014

...But they're waiting for the new **"wow factor"**:



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

Loyalty is a delicate balance to create and even harder to maintain. While no one owns the screenager, emotional trust is created by the right services, simplicity, identity, quality, privacy and products.

Screenagers may say they love you, but they live and breathe real-time emotions.

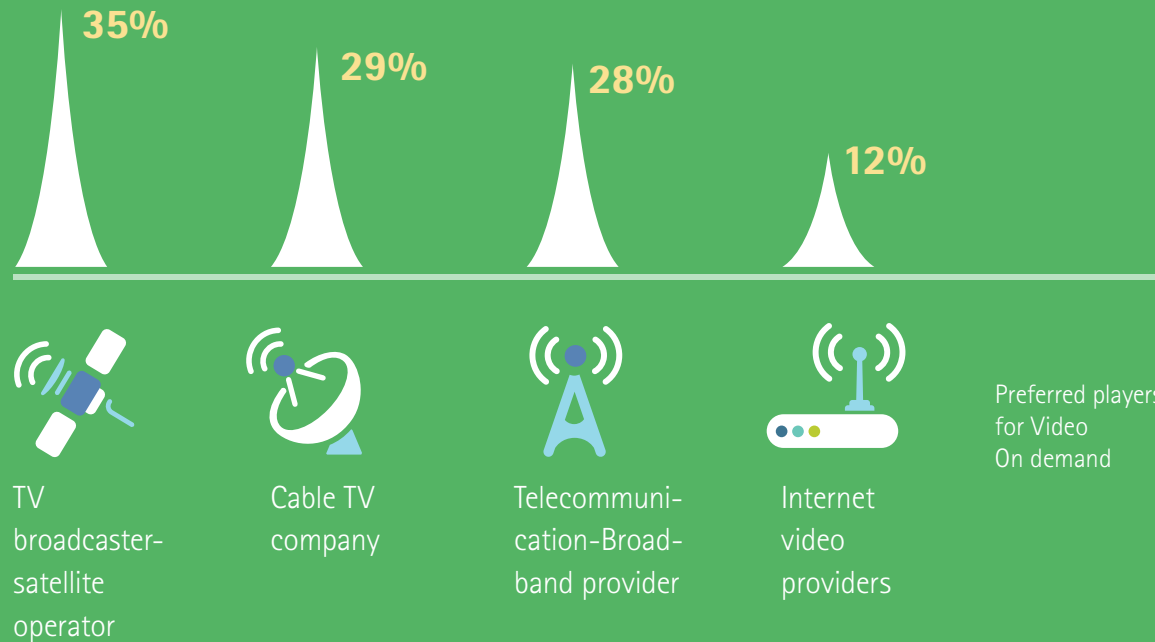
Establishing and maintaining brand engagement—without compromise—is critical to reaching screenagers and keeping them connected.



The Brand Engagement

Quality, Simplicity & Emotional Trust

Customers still trust **established brands** more than disruptive digital players...



42% prefer a telecom operator

when buying home connected surveillance cameras, sensors and security system

...but **they** need to be careful on customer experience



Ensure a superior customer experience leveraging digital channels

About the 2016 Accenture Digital Consumer Thought Leadership program

The Accenture Digital Consumer Thought Leadership program for communications, media and technology companies is based on a survey which was conducted online between October and November 2015, with 28,000 consumers in 28 countries: Australia, Brazil, Canada, China, Czech Republic, France, Germany, Hungary, India, Indonesia, Italy, Japan, Mexico, Netherlands, Philippines, Poland, Romania, Russia, Saudi Arabia, Slovakia, South Africa, South Korea, Spain, Sweden, Turkey, United Arab Emirates, United Kingdom, United States.

The sample in each country is representative of the online population, with respondents ranging in age from 14 to 55 and over. The survey and related data modeling quantifies consumer perceptions of digital devices, content and services, purchasing patterns, preference and trust in service providers, and the future of their connected lifestyle.

About Accenture

Accenture is a leading global professional services company, providing a broad range of services and solutions in strategy, consulting, digital, technology and operations. Combining unmatched experience and specialized skills across more than 40 industries and all business functions—underpinned by the world's largest delivery network—Accenture works at the intersection of business and technology to help clients improve their performance and create sustainable value for their stakeholders. With approximately 373,000 people serving clients in more than 120 countries, Accenture drives innovation to improve the way the world works and lives.

Visit us at www.accenture.com.

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