

Screenager ++

Multiplied Experiences.
Real-time Emotions.

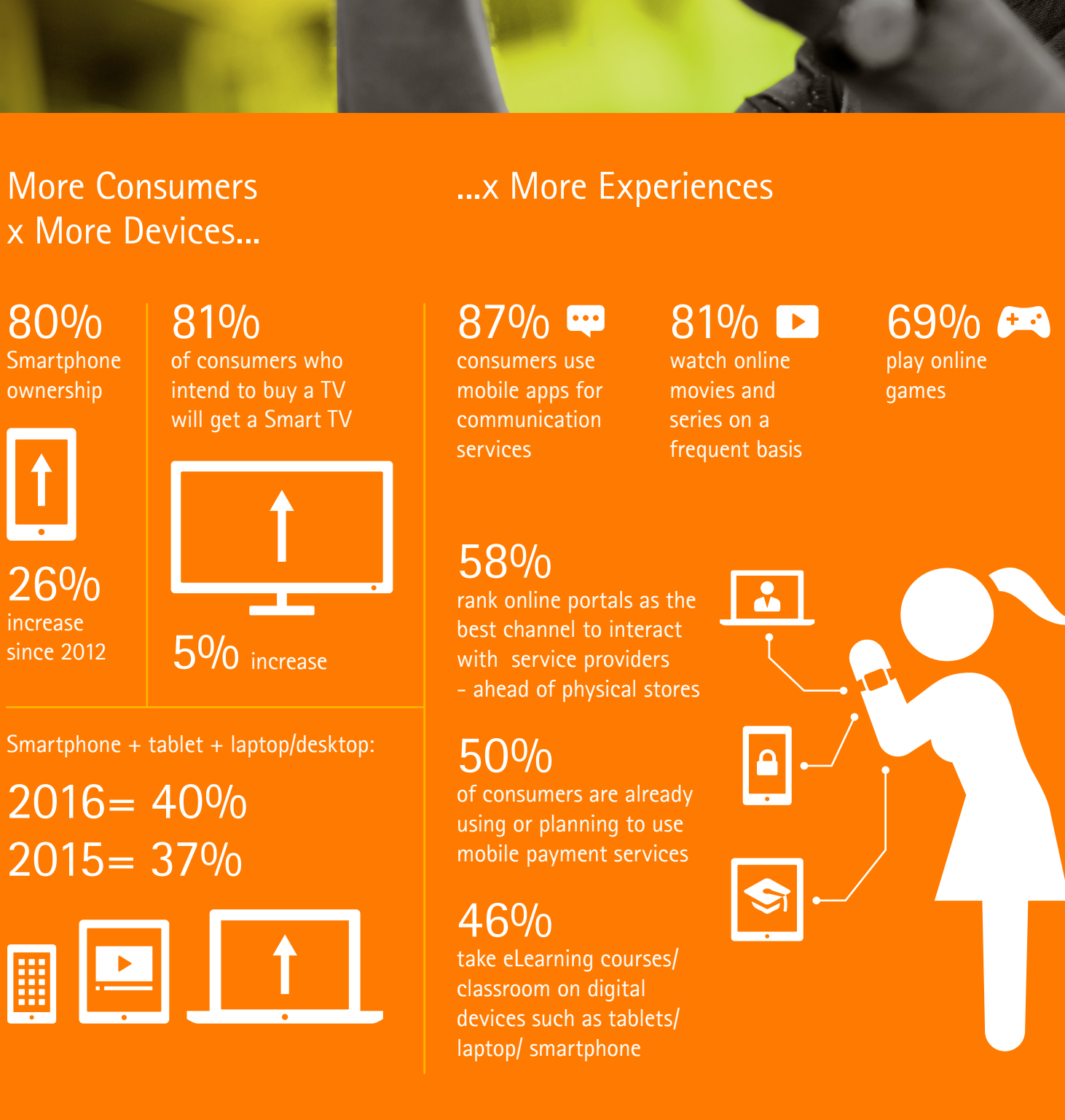
High performance. Delivered.



01

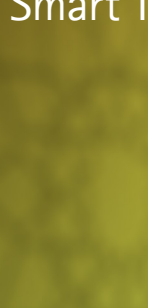
The Multiplier Effect

More Consumers x More Devices
x More Experiences

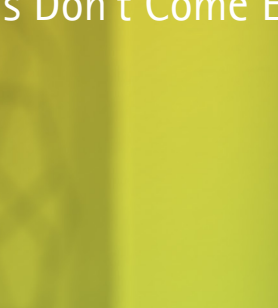


More Consumers x More Devices...

80% Smartphone ownership



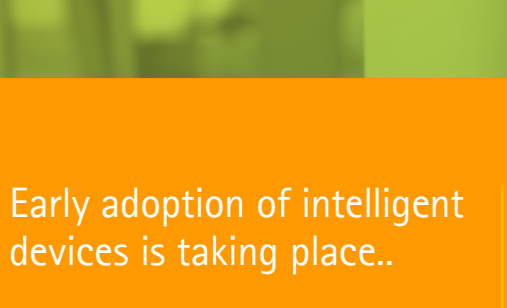
81% of consumers who intend to buy a TV will get a Smart TV



Smartphone + tablet + laptop/desktop:

2016 = 40%

2015 = 37%



...x More Experiences

87% consumers use mobile apps for communication services

81% watch online movies and series on a frequent basis

69% play online games

58% rank online portals as the best channel to interact with service providers - ahead of physical stores

50% of consumers are already using or planning to use mobile payment services

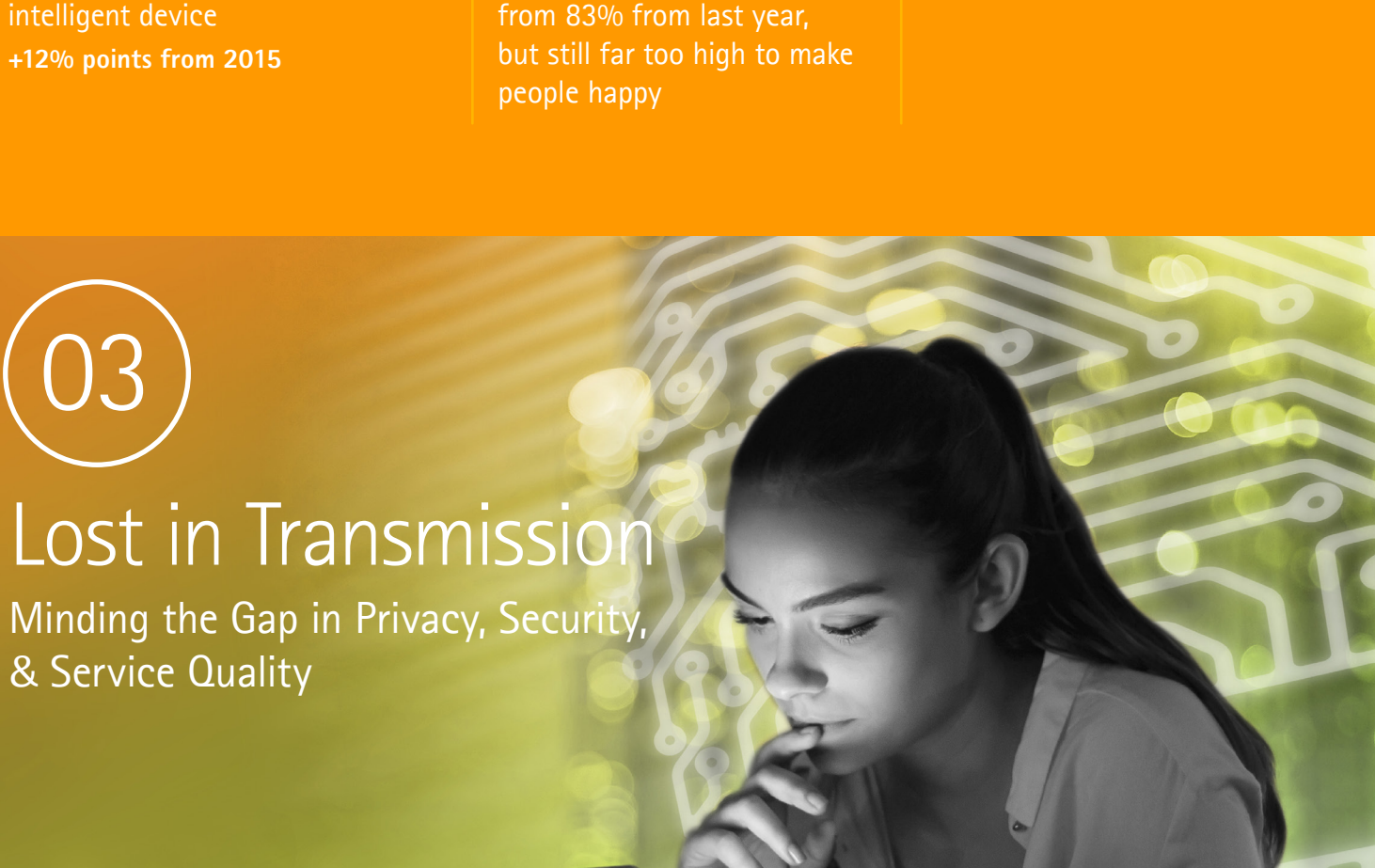
46% take eLearning courses/classroom on digital devices such as tablets/laptop/ smartphone



02

You, Me & IoT

Smart Things Don't Come Easy



Early adoption of intelligent devices is taking place...



41% already own at least one intelligent device
+12% points from 2015

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



64% faced problems when using an intelligent devices, down from 83% from last year, but still far too high to make people happy

...and the value proposition is not yet clear



Only 13% are planning to buy a smartwatch in the next 12 months

03

Lost in Transmission

Minding the Gap in Privacy, Security, & Service Quality



Privacy & Security

47% are concerned about privacy & security issues



62% are concerned about security of financial transactions

42% say recent hacker attacks using IoT devices will impact their use and purchase decisions

Service Quality

71% are ready to pay extra for better mobile network connection



83% think advertising interruptions while watching digital content are too frequent

A drop of 20% points from 33% in 2014



Only 13% plan to increase spending on smartphones, tablets, laptops and PCs.

What will encourage Screenager to purchase more products and services?



83% said reliability and speed of problem resolution

71% said large range of products and services that work well together

60% said exclusive content or services unique to a provider

41% intend to purchase a smartphone in the next year to get the newest and most innovative features

04

The Way You Make Me Feel

Screenagers Demand More or Nothing



76% think quality brands will encourage them to purchase more products and services

71% believe that having a "single bill integrating a bundle of products and services" will motivate them to purchase additional products or service

64% prefer a specialized company when buying a smart home plug devices

60% are ready to switch to a new provider due to poor mobile connections and viewing experience (+17% points from 2015)



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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 lifestyles.

For more information, please visit www.accenture.com/screenager

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