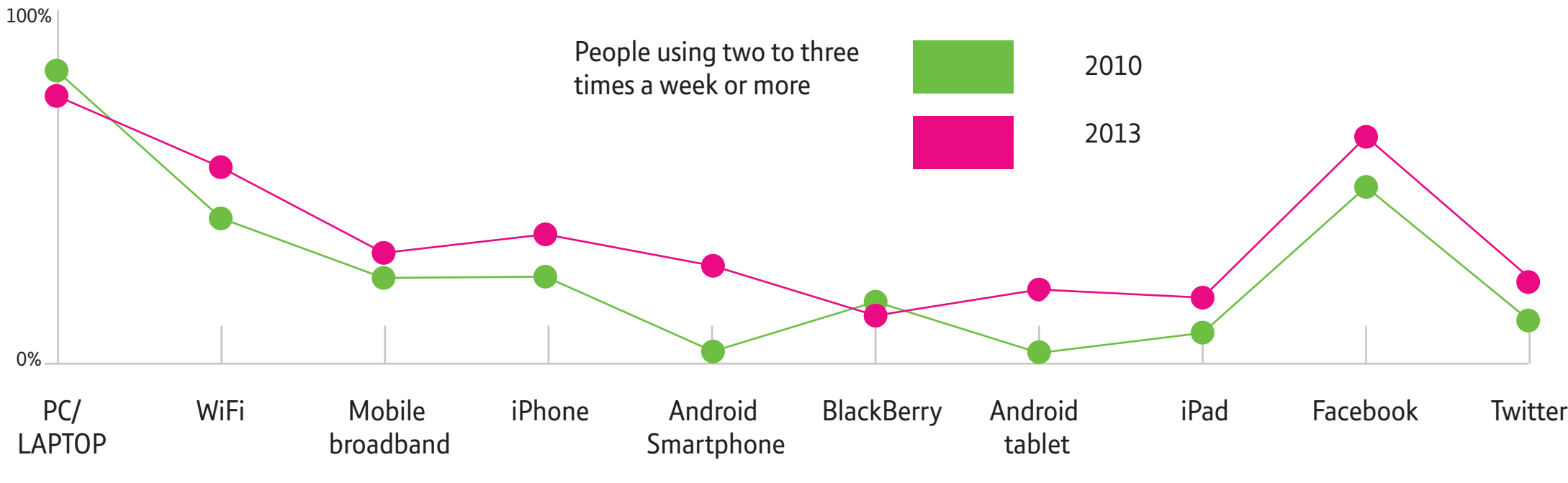


Part two

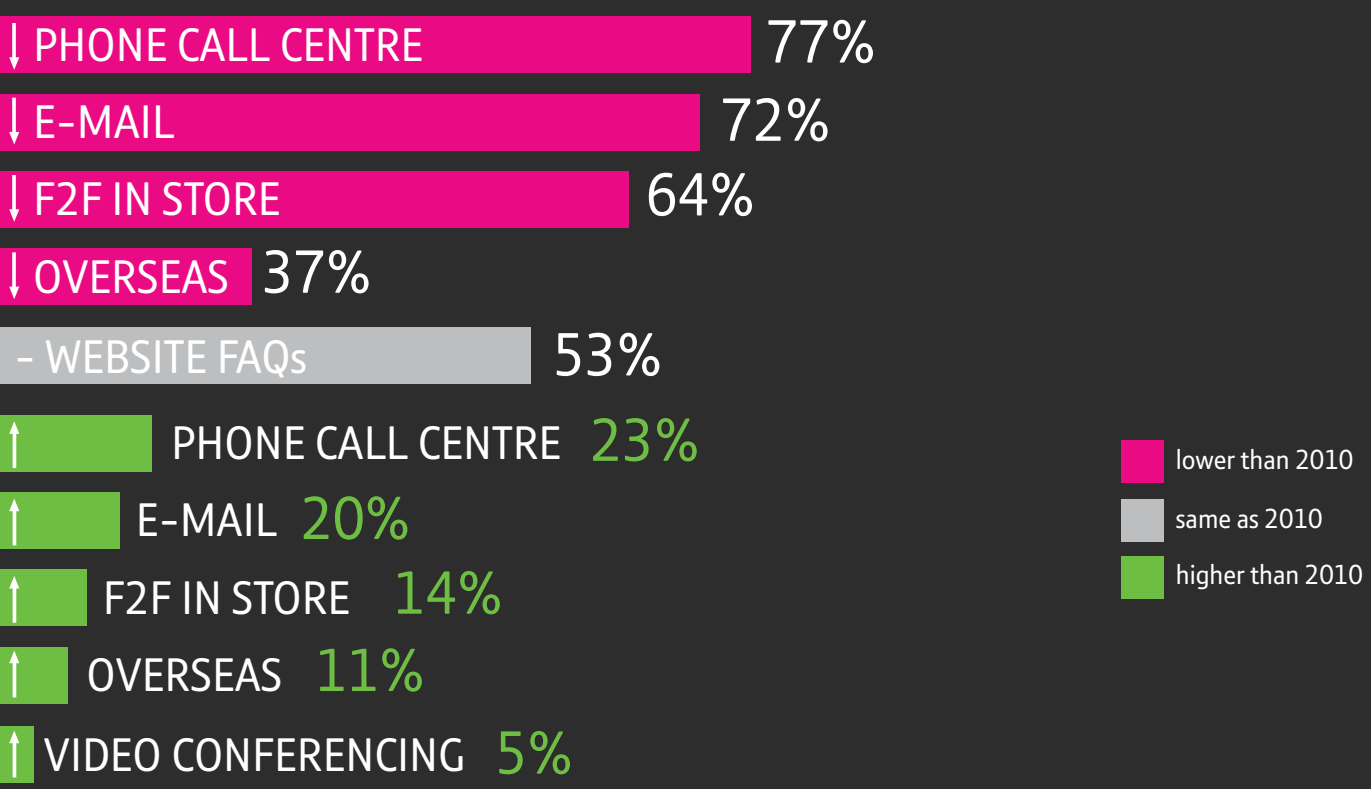
The Autonomous Customer 2013



Organisations must support wider channel choice for consumers



% using channel to communicate with organisations in 2013



82%
Would like it if organisations always offered different channels to meet my needs

Fragvergence research

(BT/Avaya 2008)
Consumers will use more channels to communicate with organisations, leaving the challenge of providing an integrated experience

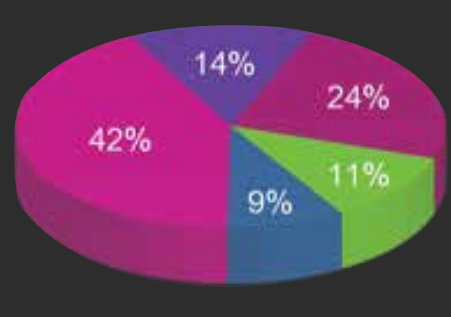


Growth in social media to interact with organisations: 39% of smartphone users do it while on the move

55%
have interacted with a company using social media

- 33% to get special offers or vouchers
- 8% to complain about the company
- 12% to get customer service

Which of the following best describes your experience of using Twitter and Facebook for customer service?



- 42% have never used it before
- 14% have probably used it but won't bother again
- 24% have found it quite useful on a few occasions
- 11% it has often been very useful
- 9% I love it and use as often as possible

39%
used their smartphone to comment on Facebook or Twitter about customer service just received

only **19%**
find it easier to contact organisations via Facebook

23%
trust content on organisations' websites



Video conferencing is 100% up on 2010 as video culture grows



13%
in 2013

are using video conferencing at home weekly compared to

6% in 2010



53%
in 2013

are using YouTube at home weekly compared to

41% in 2010

Top uses for VIDEO CHAT

- ONE HEALTHCARE, HOSPITALS AND NHS
- TWO RETAILERS
- THREE BANKS AND FINANCIAL SERVICES
- FOUR TRAVEL AND HOLIDAY COMPANIES
- FIVE FMCG

Which of the following would you use video content for?

Use Case	UK (%)	USA (%)
To see a product being used	46%	57%
To get instructions	43%	52%
To get more information	38%	45%
To view adverts	33%	32%
To see other consumers' reviews	24%	30%
To resolve a problem	28%	25%
YouTube instead of Google to search new products	17%	24%
Use Pinit! weekly	9%	20%



16-34 year olds driving smartphone commerce

Age	16-34	Over 55
USED QR CODE	47%	9%
DOWNLOAD VOUCHERS IN STORE	45%	12%
USED LOCATION BASED SERVICES	52%	7%

- 16-34s often/sometimes use smartphone to:
- 72% Call organisations
 - 50% Scan products in store
 - 61% Receive texts from companies

Most useful Apps

- 69% maps & directions
- 51% product info
- 44% banking & money transfer
- 37% download vouchers
- 35% order products quickly
- 31% retailer apps that allow you to shop whilst on the move

62% **54%**
USE A SMARTPHONE (<30% 2010)

- USE SMARTPHONE 2-3 times a week or more:
- 78% Access web
 - 74% SMS
 - 68% Facebook/Twitter
 - 51% Location based services
 - 46% YouTube