

DYNAMIC DIGITAL CONSUMERS

**Ever-changing expectations
and technology intrigue**

**Highlights from the 2017
Accenture Digital Consumer Survey
for the UAE**



ARTIFICIAL INTELLIGENCE (AI)

Our survey reveals that UAE consumers are ahead of global averages in readiness to adopt AI powered devices and services. Half of them (51%) think they are “cool”.

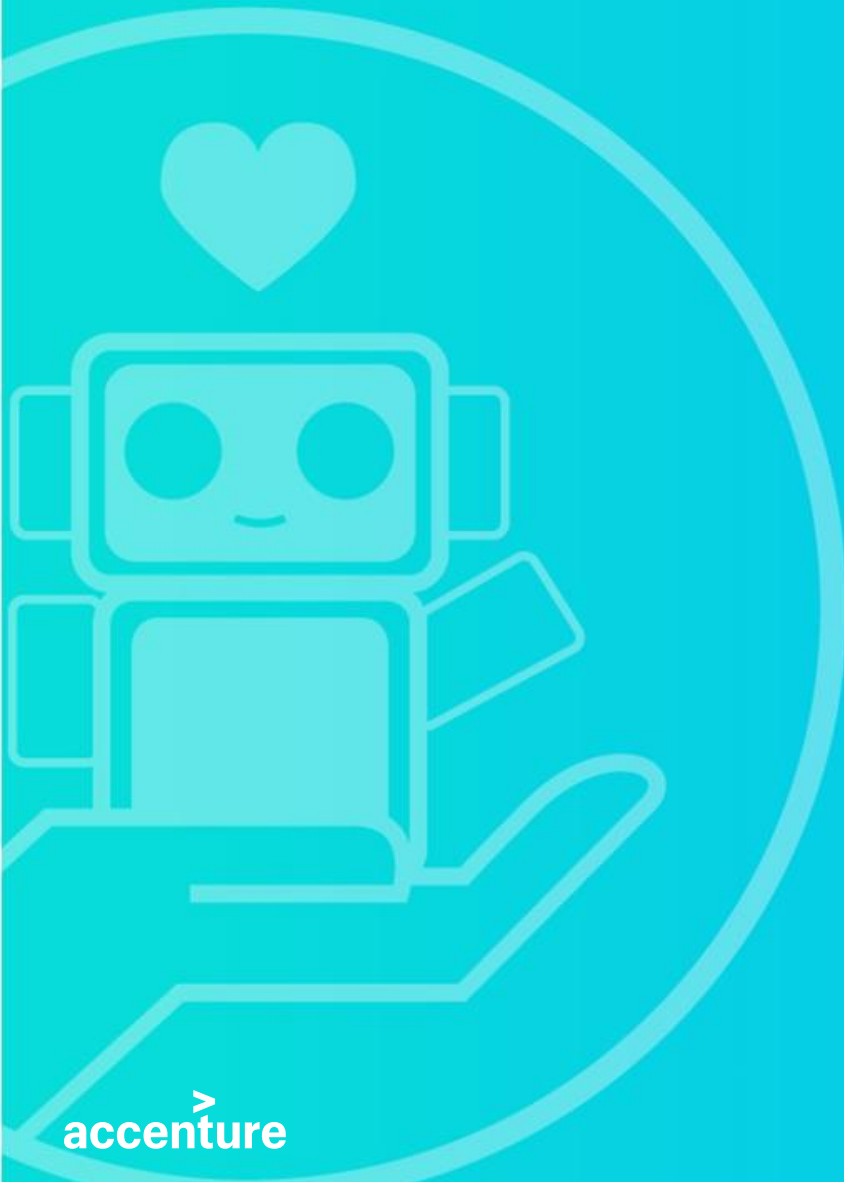
An impressive 73 % of consumers currently use or are interested in using the voice-enabled digital assistant in their smartphone, PC or other devices. Such usage is a positive signal for this category as it represents a much more enthusiastic adoption pattern than many new product categories recently released.

Furthermore, while just a few short years ago many customers resisted chatbots and other computerized customer service features, now 76 % are comfortable with an AI application responding to their query. This value is higher than global (62%); US (59%), UK (54%) and Singapore (71%) average.

Consumers see big benefits over human advisors too: It’s available any time (82%); it’s nice and polite (74%); and, it’s faster to engage (74%). In fact, consumers appear to be readily accepting AI-enabled capabilities as long as they get their objective accomplished.

ARTIFICIAL INTELLIGENCE (AI)

is taking a central role in consumers' lives.



68% Interacted with **computer based applications** in the last 12 months
Global 52% | US 55% | UK 40% | Singapore 65%

44% Are interested in using a **voice-enabled digital assistant embedded** in smartphones or PC
Global 31% | US 36% | UK 33% | Singapore 34%

29% Are interested in using a **standalone voice-enabled digital assistant** device
Global 20% | US 29% | UK 18% | Singapore 21%

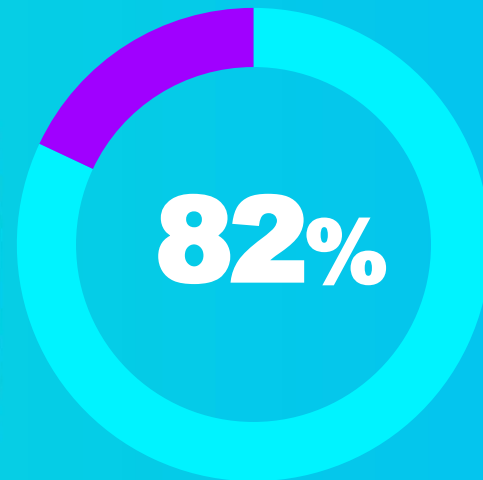
51% Think **personalized services** based on digital voice-enabled assistant are **cool**
Global 38% | US 35% | UK 25% | Singapore 46%

76% Are **comfortable** with an **AI application** responding to their query
Global 62% | US 59% | UK 54% | Singapore 71%

ARTIFICIAL INTELLIGENCE (AI)

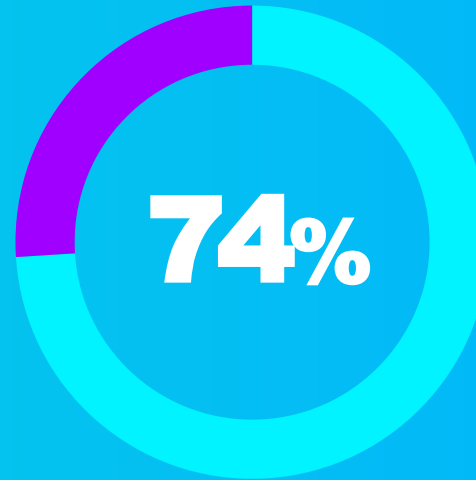
is taking a central role in consumers' lives.

PERCEIVED BENEFITS OF AI OVER HUMAN ADVISORS



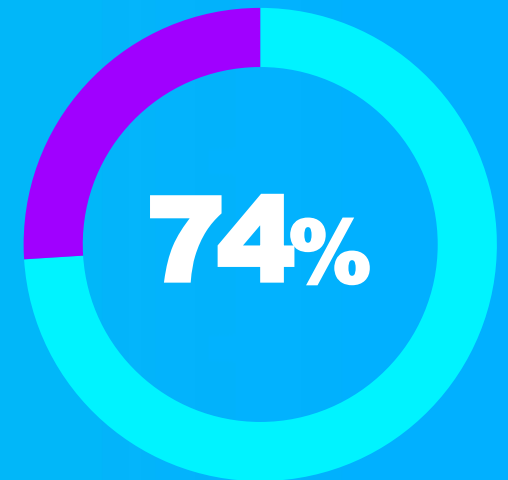
Say "available anytime"

Global 82% | US 88% |
UK 84% | Singapore 89%



Say "very polite interactions"

Global 64% | US 68% |
UK 62% | Singapore 77%



Say "faster engagement"

Global 68% | US 70% |
UK 74% | Singapore 76%

ENGAGING EXPERIENCES

Engaging experiences are spurring demand for smart devices and the employment of new technologies, with the UAE bucking global average trends.

Experiences enabled by augmented reality (AR) and virtual reality (VR) are contributing to drive up purchase intent for smartphones (68%), smart glasses (55%) and VR headsets (54%); global averages sit lower respectively at 56%, 42 %and 39%. The most popular reasons given by UAE respondents for this upswing, were interests in learning new skills and techniques and meeting others virtually.

Consumers value personalized services that make life easier and are comfortable with services becoming increasingly personalized through the use of large amounts of personal data. Compared to other countries, UAE consumers have showed **more propensity to let track their online behavior** if this could enrich and improve their digital experience.



ENGAGING EXPERIENCES

AR and VR are boosting demand for smart devices.

Augmented Reality (AR) and Virtual Reality (VR) are driving up purchase intent for:



Smart phones

68% **56%**

US 40% | UK 53% | Singapore 63%



Smart glasses

55% **42%**

US 32% | UK 43% | Singapore 44%



VR headset

54% **39%**

US 46% | UK 33% | Singapore 44%

■ UAE

■ Global

Reasons for consumer interest in AR and VR enabled services:

36% Learn new skills / techniques

Global 34% | US 29% | UK 26% | Singapore 41%

34% Meeting virtually

Global 29% | US 28% | UK 17% | Singapore 33%

29% Get local info

Global 28% | US 28% | UK 22% | Singapore 35%

ENGAGING EXPERIENCES

UAE consumers demand hyper-personalized services

Most useful services that would use personal information to provide a customized experience:

56%

Entertainment advisor

Global 40% | US 49% | UK 33% | Singapore 48%

54%

Event advisor

Global 41% | US 47% | UK 33% | Singapore 47%

52%

Home mood-atmosphere assistant

Global 43% | US 48% | UK 33% | Singapore 45%

47%

My fashion assistant

Global 34% | US 37% | UK 26% | Singapore 37%

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65% Think tracking of online behavior and shopping history help save time and give a more personalized service

Global 40% | US 52% | UK 39% | Singapore 55%

61% See the Telco operator as their first choice for connected home services

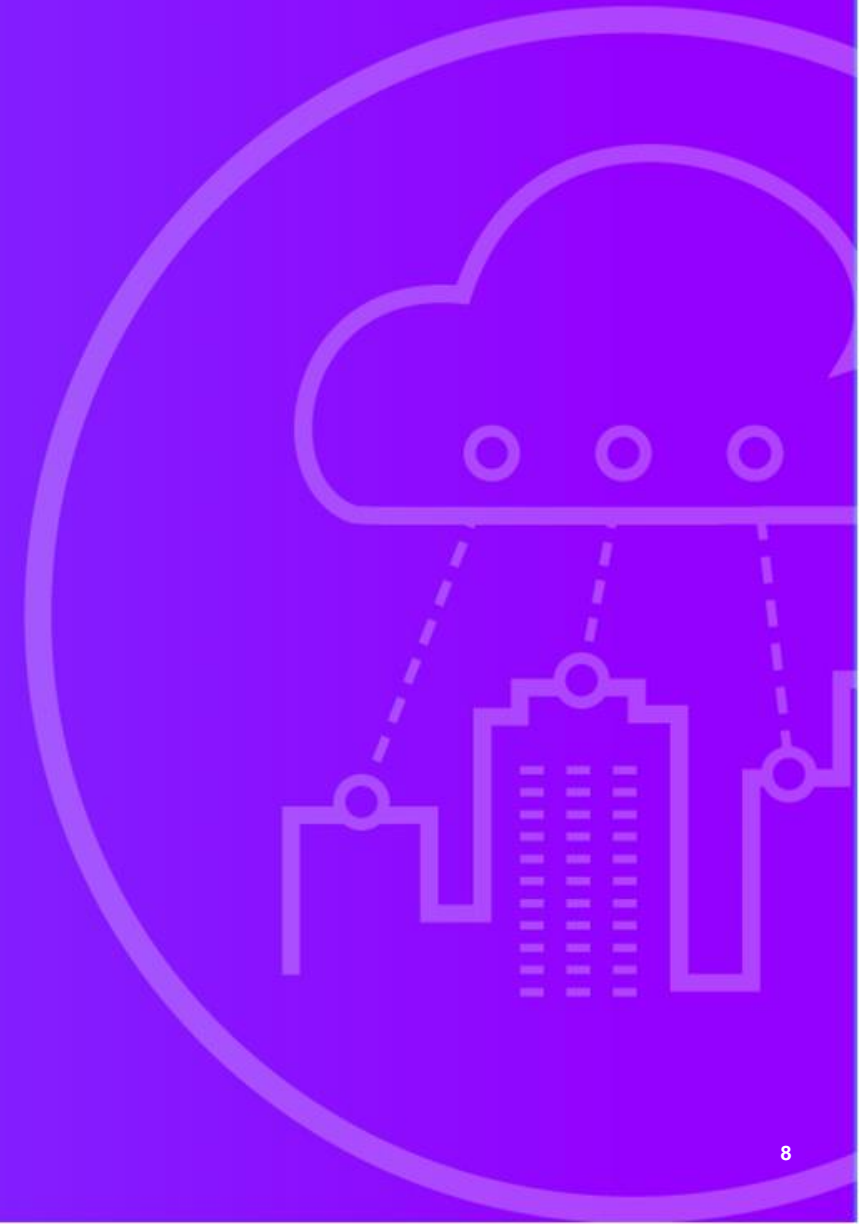
Global 54% | US 45% | UK 35% | Singapore 51%

NEW ACCESS MODELS

Consumers in UAE have strong interest in new device access models and are knowledgeable of what is coming next.

44 percent of respondents are aware that eSIMs will be available in the near future ranking higher than consumers in the UK (24%), US (40%) and Singapore (39%). 86% of consumers are interested in using a device with an eSIM in the next 12 months, if available, and indicate the ability to switch service providers more easily as the main reason for that interest.

They look forward to using voice assistants (64%), gesture control (62%) and eye movement (50%) on mobile and at home in the near future. UAE consumers are ahead of global average sitting down at 58% , 43% and 32% respectively.



NEW ACCESS MODELS

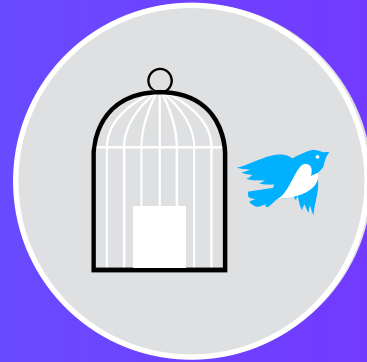
are emerging



44%

Are aware that eSIMs will be available in the near future

Global 34% | US 40% | UK 24% | Singapore 39%



86%

Are interested in using a device with an eSIM

Global 68% | US 63% | UK 52% | Singapore 77%



51%

Cite the top reason as “the ability to switch service more easily”

Global 50% | US 59% | UK 50% | Singapore 59%



NEW ACCESS MODELS

are emerging

In the future, consumers would like to interact with different digital devices -both mobile and at home- through:

64%
VOICE CONTROL



Global 58% | US 56% |
UK 43% | Singapore 54%

62%
GESTURE CONTROL



Global 43% | US 41% |
UK 32% | Singapore 55%

50%
EYE MOVEMENT



Global 32% | US 36% |
UK 25% | Singapore 35%

BUILDING TRUST

Despite companies' efforts and successes in increasing data security, UAE consumers' confidence in the security of their personal data is still quite low.

Our survey shows that one important way to increase consumer confidence is to engage them more in managing their data. Nearly all (83 percent) consumers believe it is important for them to be able to review and control their personal data online and the majority (79 percent) refuse to do business with a company that has unclear or unsafe privacy policy settings.

It is a critical time for companies to reexamine how to maintain and build trust and how to operate in a digital world that is increasingly dependent on sharing of personal data.

BUILDING TRUST

Consumers in the UAE want to be in control and manage their data

83% Say it's important for them to **review and control their personal online data**

Global 87% | US 91% | UK 88% | Singapore 92%

79% **Refuse to do business** with a company that has unclear or unsafe privacy policy settings

Global 73% | US 76% | UK 67% | Singapore 73%

40% Share personal data with companies if **safeguards for data protection are in place**

Global 44% | US 60% | UK 53% | Singapore 53%

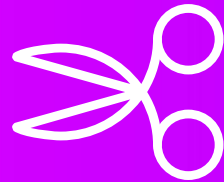
59% Expect data protection and security will **improve within the next five years**

Global 46% | US 49% | UK 37% | Singapore 45%

BUILDING TRUST

Consumers in the UAE want to manage and monetize their data

Sharing personal data with companies requires something in return:



31%

A more tailored / personalized customer experience

Global 27% | US 37% | UK 24% | Singapore 32%



25%

Discount or other types of financial benefits

Global 28% | US 40% | UK 29% | Singapore 33%



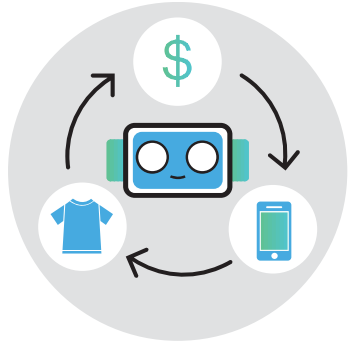
20%

Profiting from personal data by selling it

Global 19% | US 28% | UK 18% | Singapore 20%

CONCLUSIONS

Capturing today's **DYNAMIC DIGITAL CONSUMER**



TAKE ADVANTAGE OF AI to make the right personalization play

Companies have an unprecedented opportunity to tap ongoing advances in AI and machine learning to be much more dynamic as new trends emerge. According to Fjord Trends 2017 report, “while A.I. has evolved exponentially, in 2017 we will see a shift in organisations’ approaches to developing products and services as emotional intelligence (EQ) becomes a critical A.I. differentiator.” AI is central to understanding the needs and desires of different consumers, personalizing services, and driving demand.

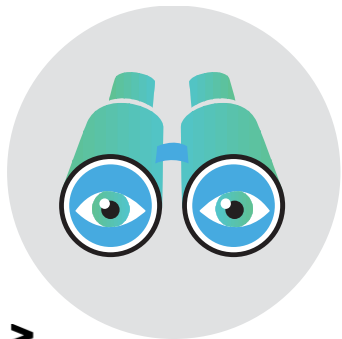
EMBRACE NEW ACCESS MODELS

Now is the time to stake a position in an as-a-service consumer market. As consumers increasingly resist being locked into hardware purchases, providers can create more dynamic operations and customer relationships if they look beyond the hardware purchase.



HELP CONSUMERS MANAGE THEIR DATA

Seize the opportunity to build further trust, being more transparent to create a strong relationship with consumers. Greater transparency is required as consumers now expect to be able to control what data is shared with whom. Make data security “personal” and “easy” to drive adoption of new devices and services.



METHODOLOGY

Accenture conducted an online survey with approximately 26,000 consumers in 26 countries (1,000 respondent in each country): Australia, Brazil, Canada, China, Czech Republic, France, Germany, Hungary, India, Ireland, Italy, Japan, Mexico, Netherlands, Poland, Romania, Saudi Arabia, Singapore, Slovakia, South Africa, Spain, Sweden, Turkey, United Arab Emirates, the United Kingdom and the United States.

The sample in each country was representative of the online population, with ages of respondents ranging from 14 to 55+. The survey and related data modelling quantify consumer perceptions of digital devices, content and services, purchasing patterns, preference and trust in service providers, and the future of their connected lifestyles.

This report highlights UAE survey findings, that are compared with Global average as well as with US, UK and Singapore results.

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