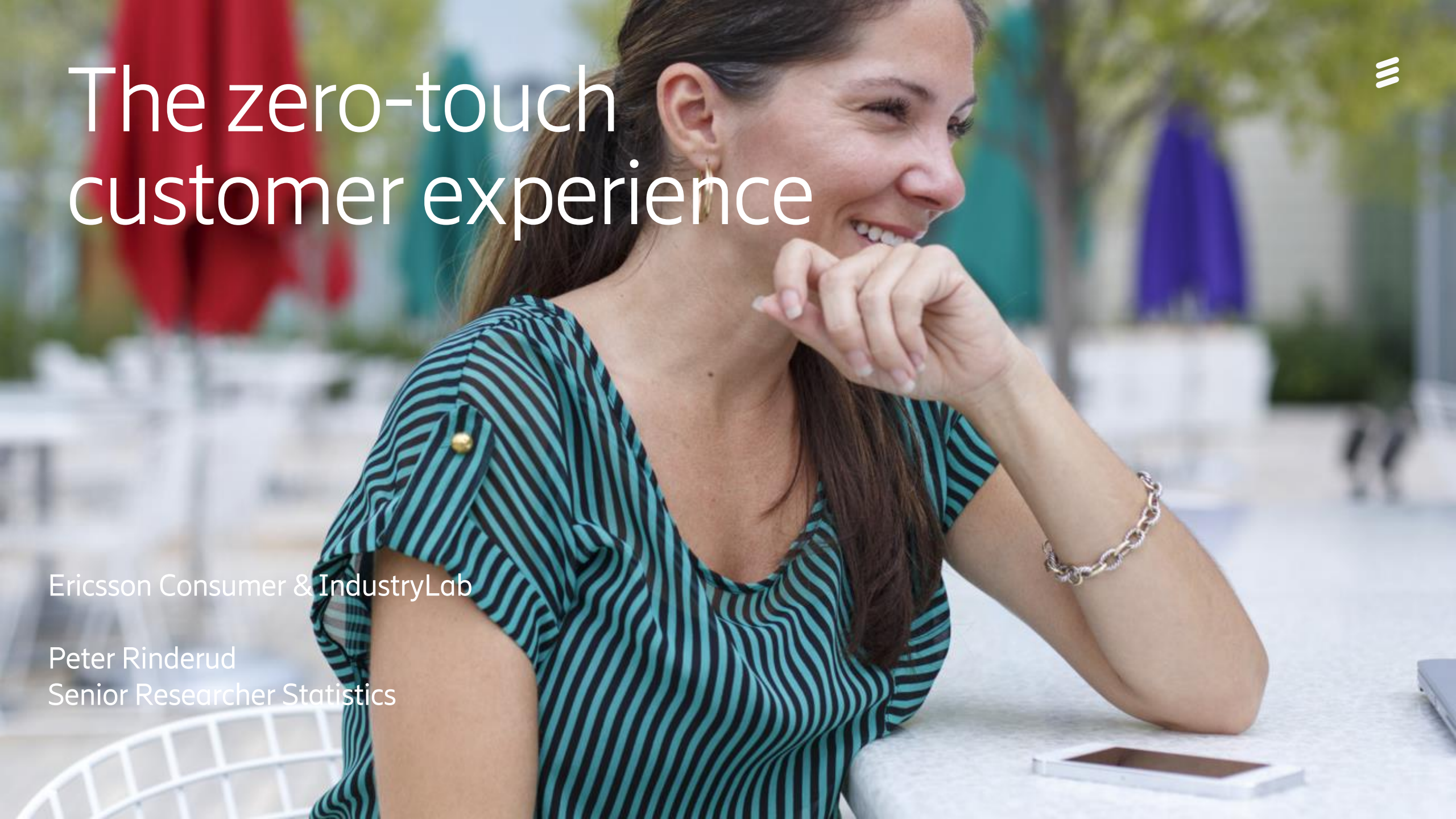


The zero-touch customer experience



Ericsson Consumer & IndustryLab

Peter Rinderud
Senior Researcher Statistics

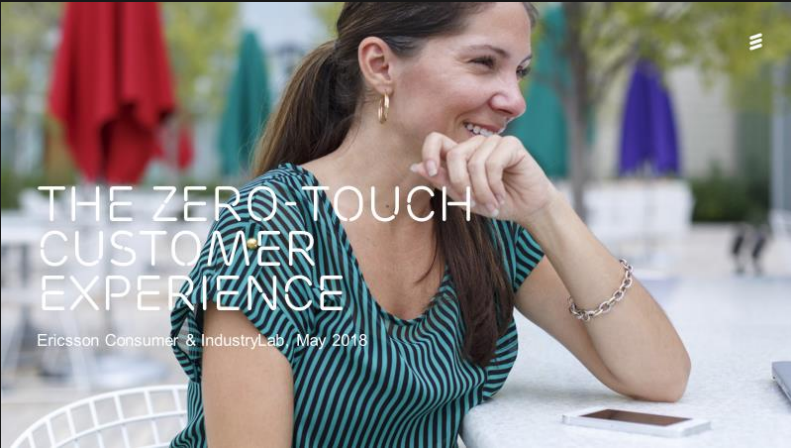


ConsumerLab and ICT research



Beyond smartphone shopping —
the rise of smart assistants

Ericsson Consumer & IndustryLab
May 2018



THE ZERO-TOUCH
CUSTOMER
EXPERIENCE

Ericsson Consumer & IndustryLab, May 2018



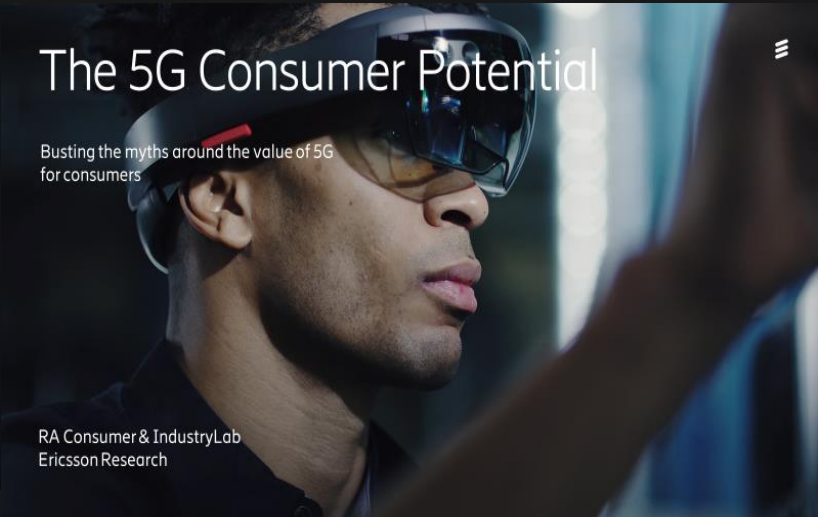
#OMG Social media
is here to stay

An Ericsson ConsumerLab Insight Report



10 Hot Consumer
Trends 2019

Ericsson ConsumerLab



The 5G Consumer Potential

Busting the myths around the value of 5G
for consumers

RA Consumer & IndustryLab
Ericsson Research



Ready, steady, game!

Is augmented reality (AR) the next level of gaming?

An Ericsson ConsumerLab insight report

Anders Erlendsson, Peter Rinderud 2019-01-25

ConsumerLab – 24 years of consumer research



Consumer research since 1995



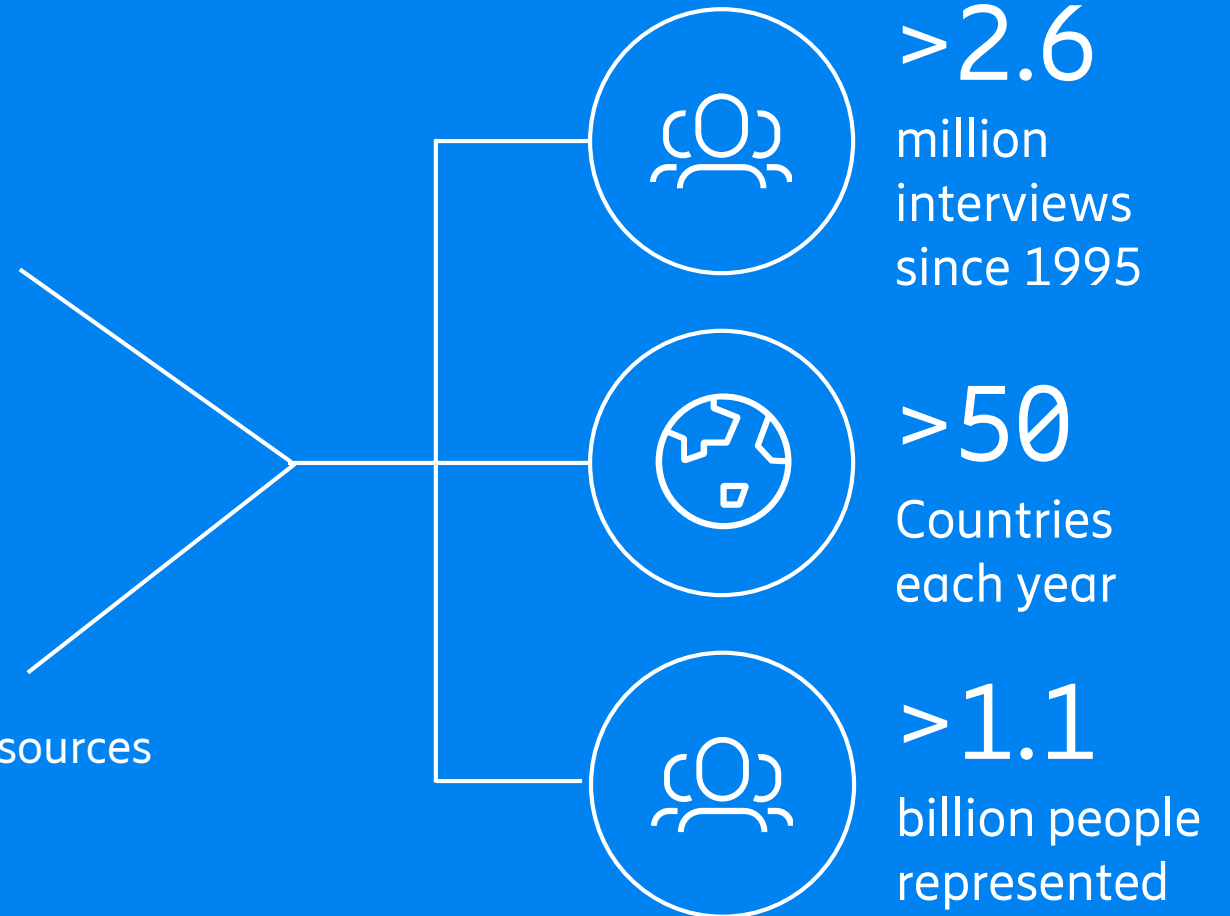
- Desktop research
- Expert interviews
- Qualitative studies



Examples of other data sources

- ODM
- AppAnnie
- Open sources (UN)

Quantitative Research



Measuring customer satisfaction in telecom



Customer interaction
experience



Network
experience



Customer
satisfaction



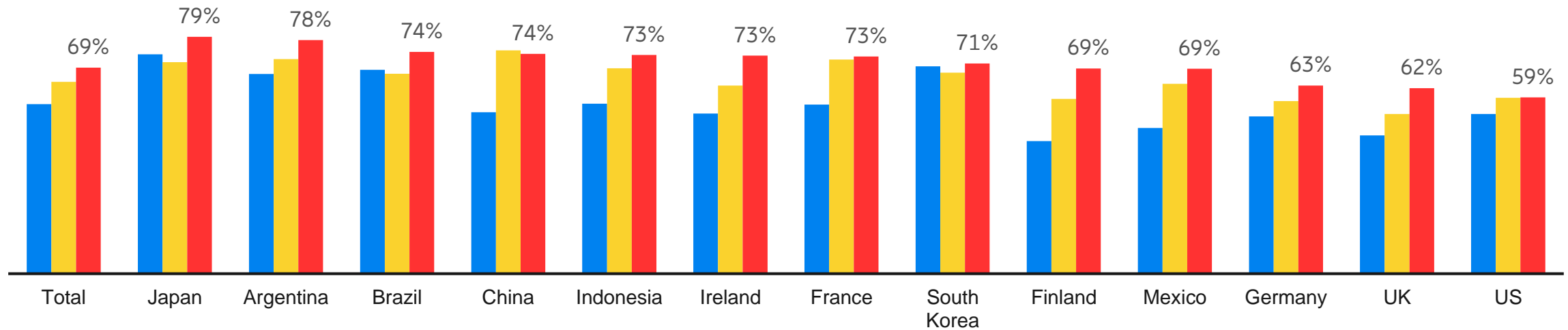
Loyalty
Recommendation
Intention to stay
Preference
Alternative

Understanding the struggle of the telecom customers



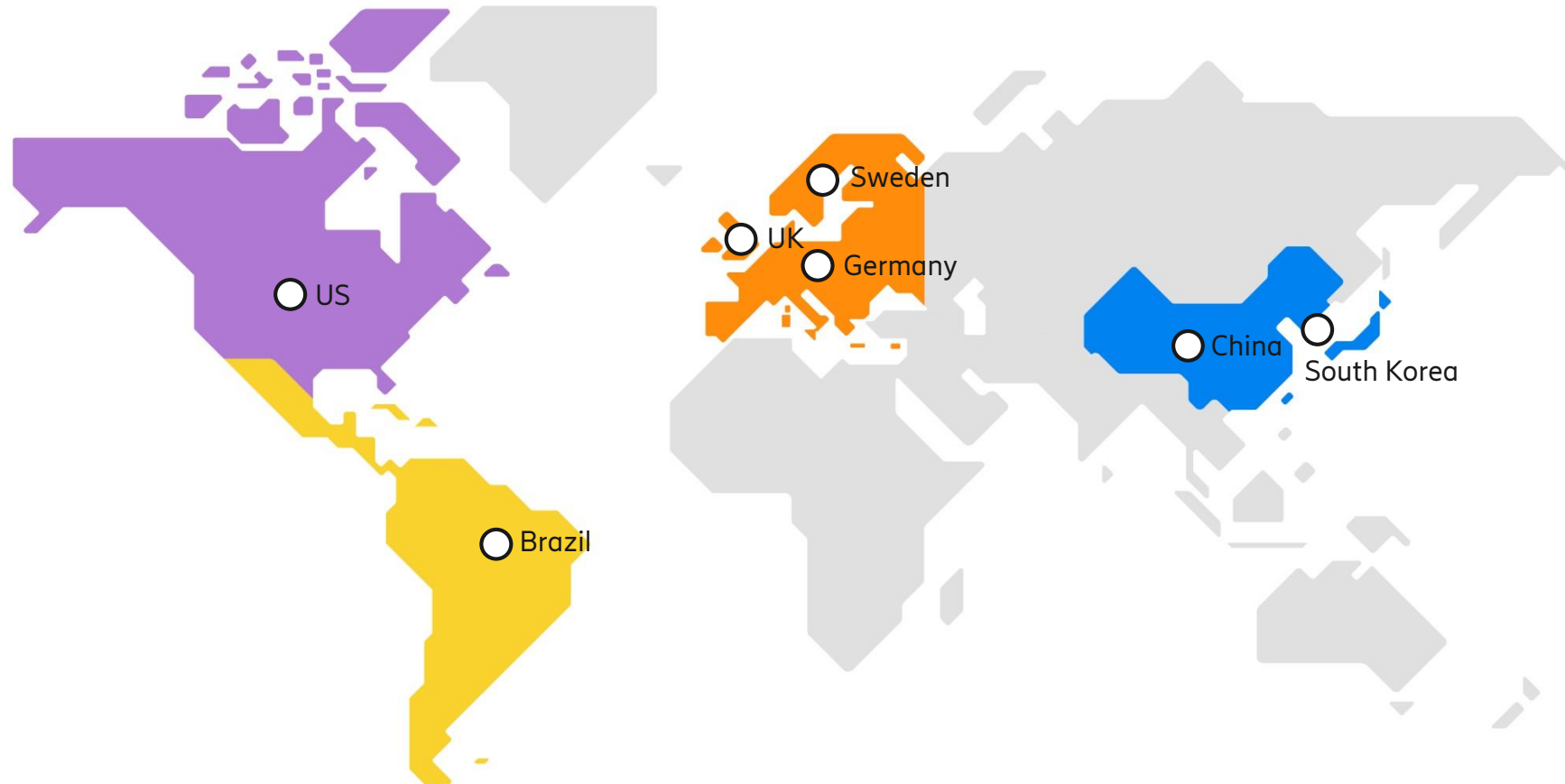
Share who agrees to negative statements about their mobile network operator

- Complicated to understand mobile data plans
- Confusing finding best data plan
- Difficult to keep up with frequent price changes



Base: Smartphone users aged 15–65 across Argentina, Brazil, China, Egypt, Finland, France, Germany, Indonesia, Ireland, Japan, Mexico, South Korea, the UK and the US
Source: Ericsson ConsumerLab, Towards a 5G Consumer Future, 2018

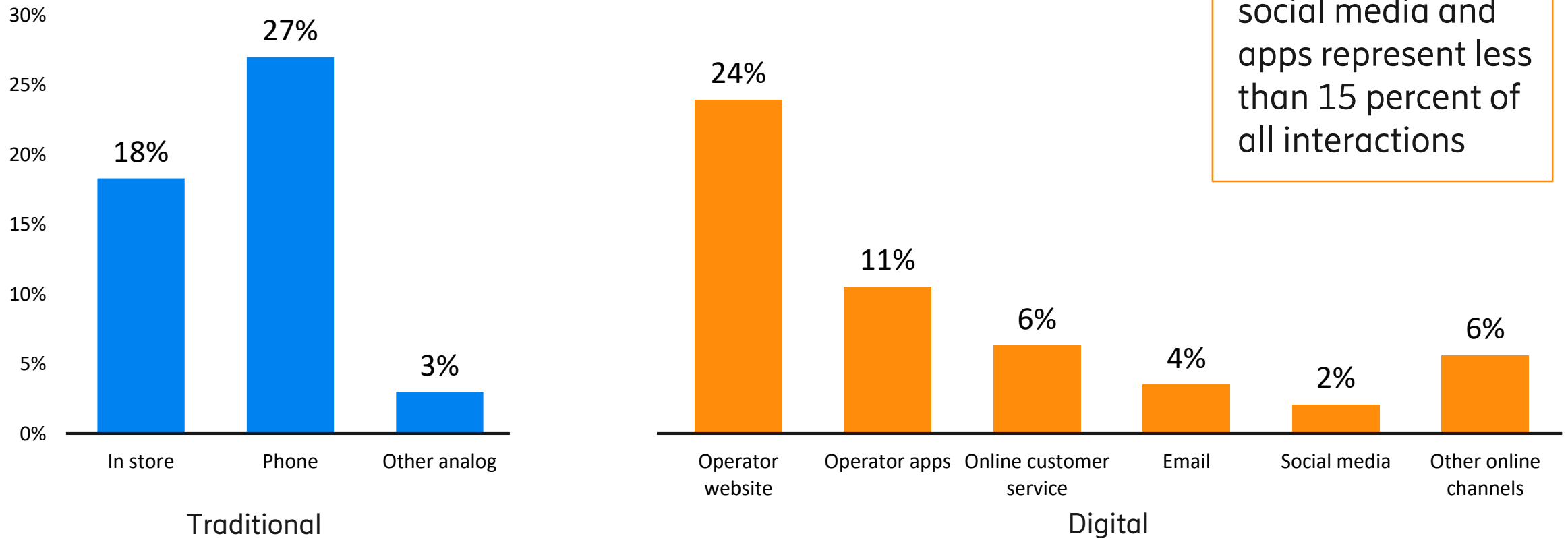
Capturing behavior and attitudes across 7 countries



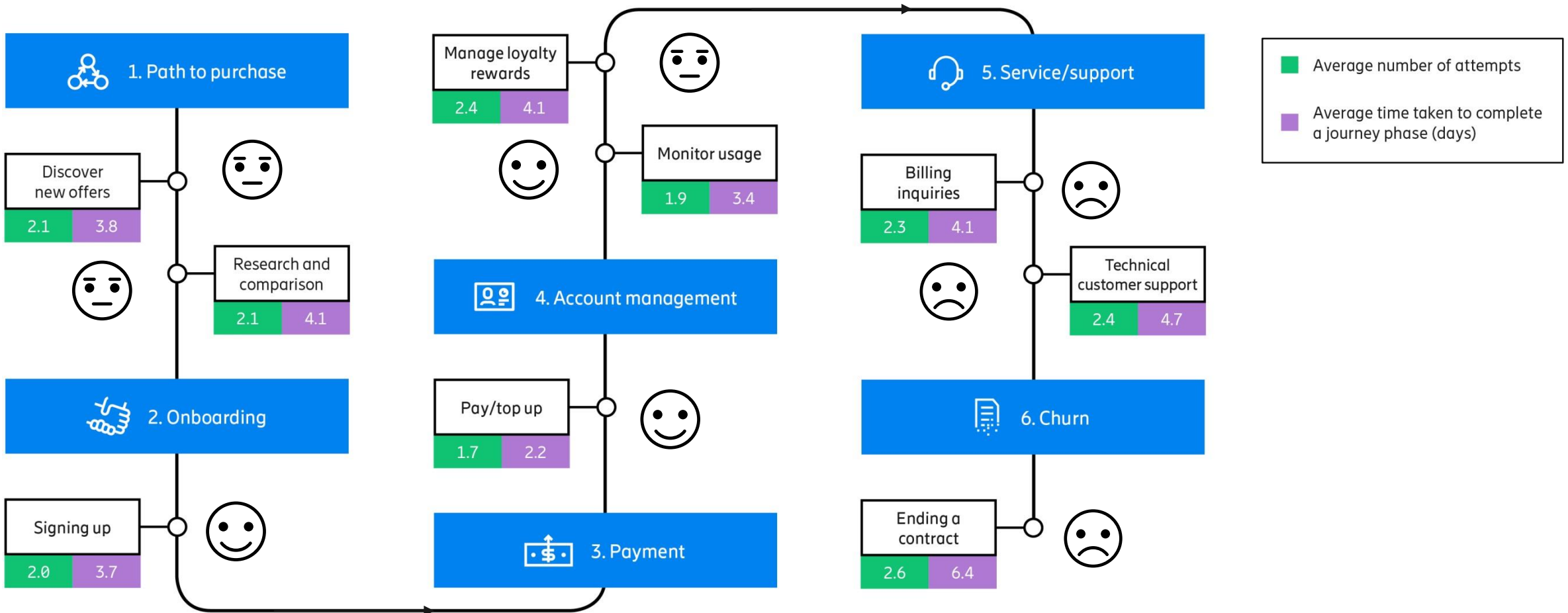
Emerging digital touchpoints



Share of all interactions done through different touchpoints



Customer effort has an impact on satisfaction

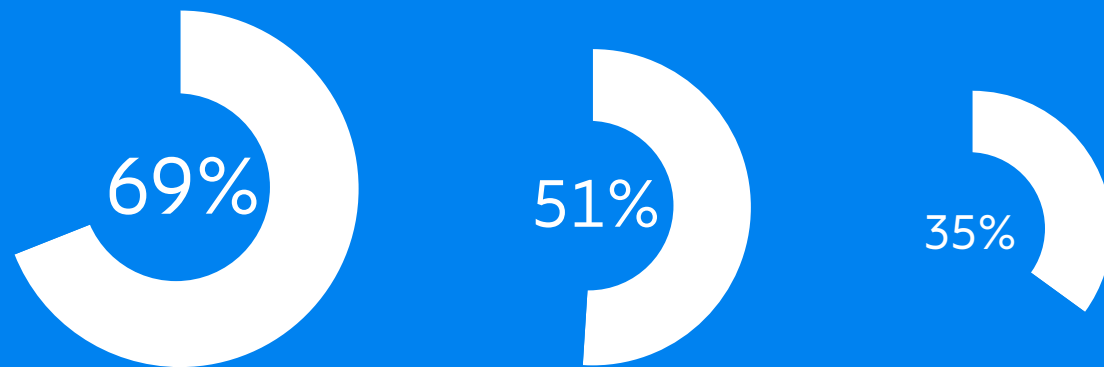


The customer interaction is exhausting



Time is critical for consumer satisfaction

Share of satisfied consumers:



If interaction is completed in less than 1 day

If interaction is completed in 1–2 days

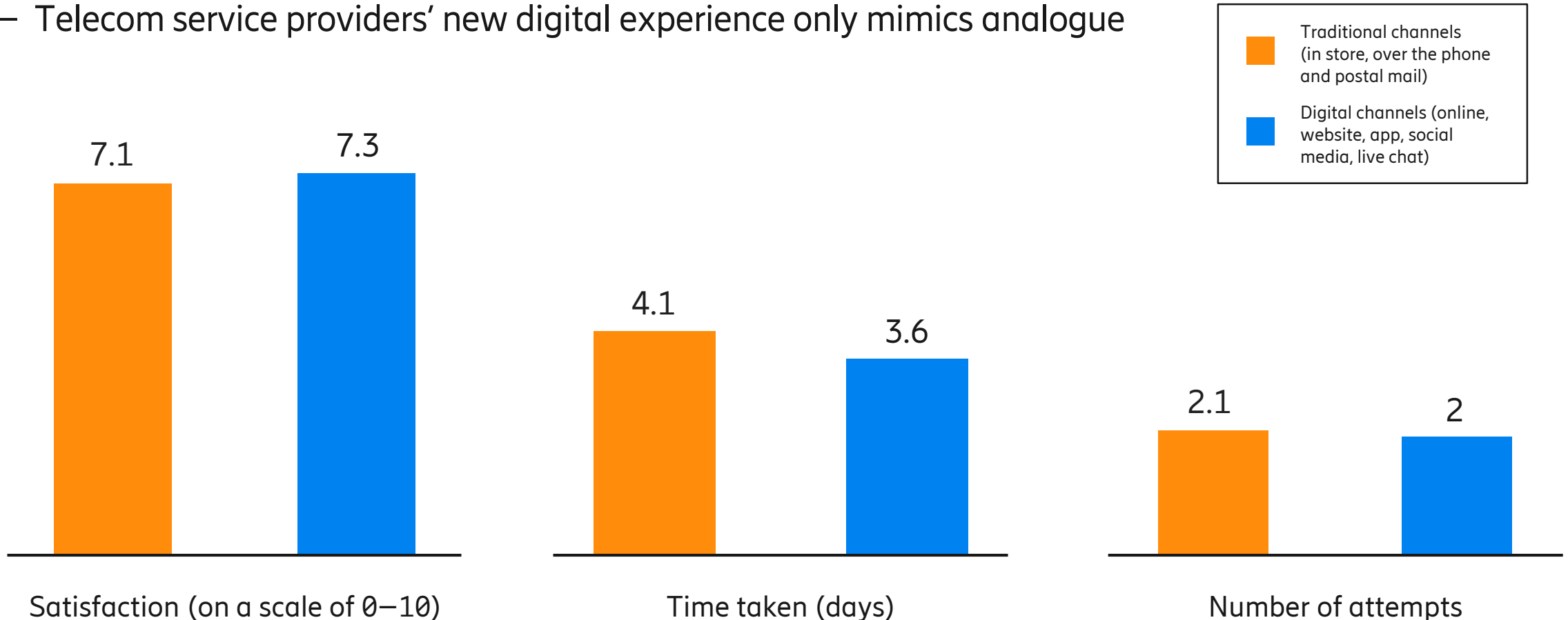
If interaction is completed in 3–4 days

- Interacting with telecom service providers makes consumers feel exhausted
- It takes smartphone users in average 2.2 attempts and 4.1 days to complete an interaction

New digital interactions only mimic analogue ones



- Digitalization increases the satisfaction level - but the difference is small
- Telecom service providers' new digital experience only mimics analogue



Operators hide behind bad technology



46%

think their telecom service provider hides behind "bad" technology such as

- do-not-reply emails
- automated replies
- impersonal Contact Us forms

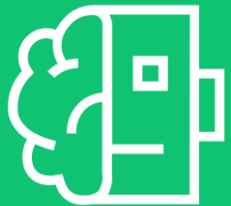
Skyrocketing consumer expectations due to new digital competition



Digital leaders such as Amazon, Netflix, Apple and Google are giving consumers a one-click experience and raising expectations.

- App
- Website
- Fast delivery
- Multi device
- One-click check out
- 24/7 VIP customer care
- Proactive notifications
- Personalized offers
- Transparency
- Unlimited
- No binding times
- Effortless
- Voice assistants
- Anticipated needs
- Self healing

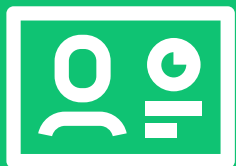
Operators needs to go from being reactive to proactive



7/10 – Use better technology!



5/10 – Anticipate my needs even before I realize what they are!



5/10 – Use information you already have about me and personalize services!



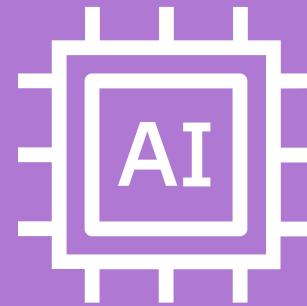
DON'T FORGET: I still want to be in control of my data and what is shared with third parties – privacy is important!

The zero-touch evolution

- From one click to zero touch
- AI and automation to pre-empt consumer needs and solve issues
- Meaningful interactions
- New ways of interactions, based on voice, gestures, and AR or VR
- Accurate and personalized marketing campaigns, promotions and offers



The zero-touch customer experience

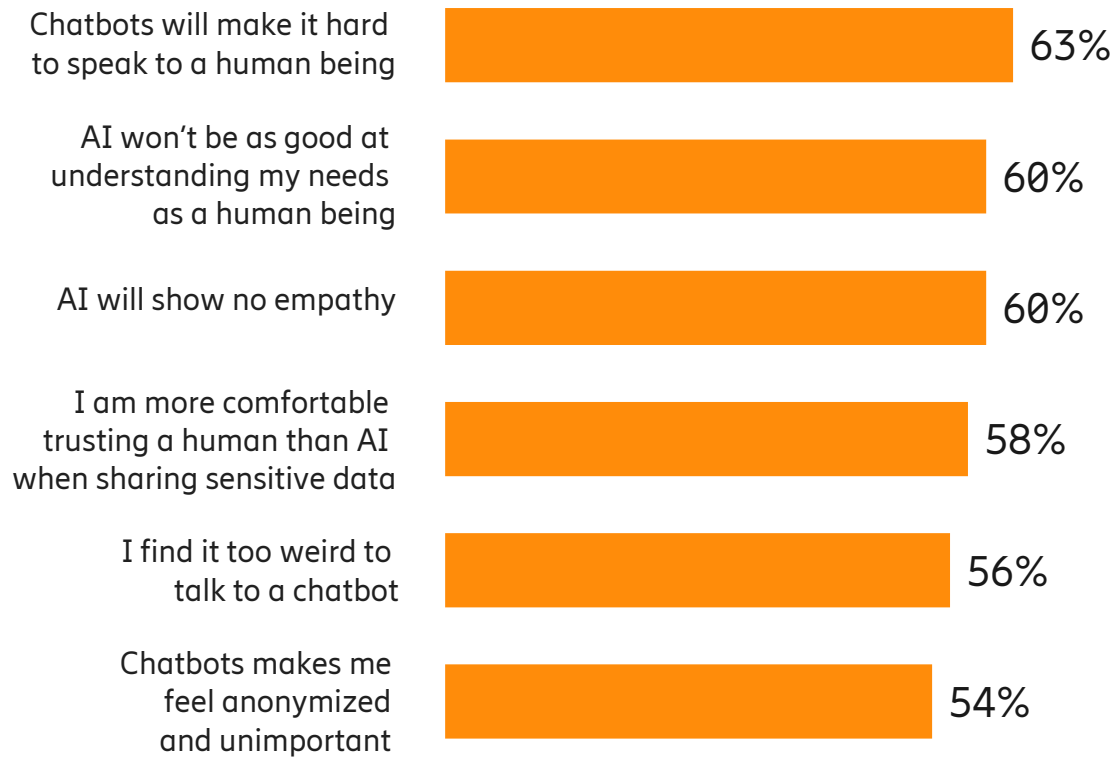


AI and automation would leverage existing data to personalize experiences, pre-empt needs and solve issues in the shortest possible time

The need for human contact



Percentage of customers who agree with different statements



“The automated voices that I speak to make me so frustrated. They don't understand me. I just want to talk to a human about it. Time is so valuable. I'd rather just get straight to the person rather than also deal with a robot.”

Jennifer, 29, US focus group

Consumers want the best of both worlds

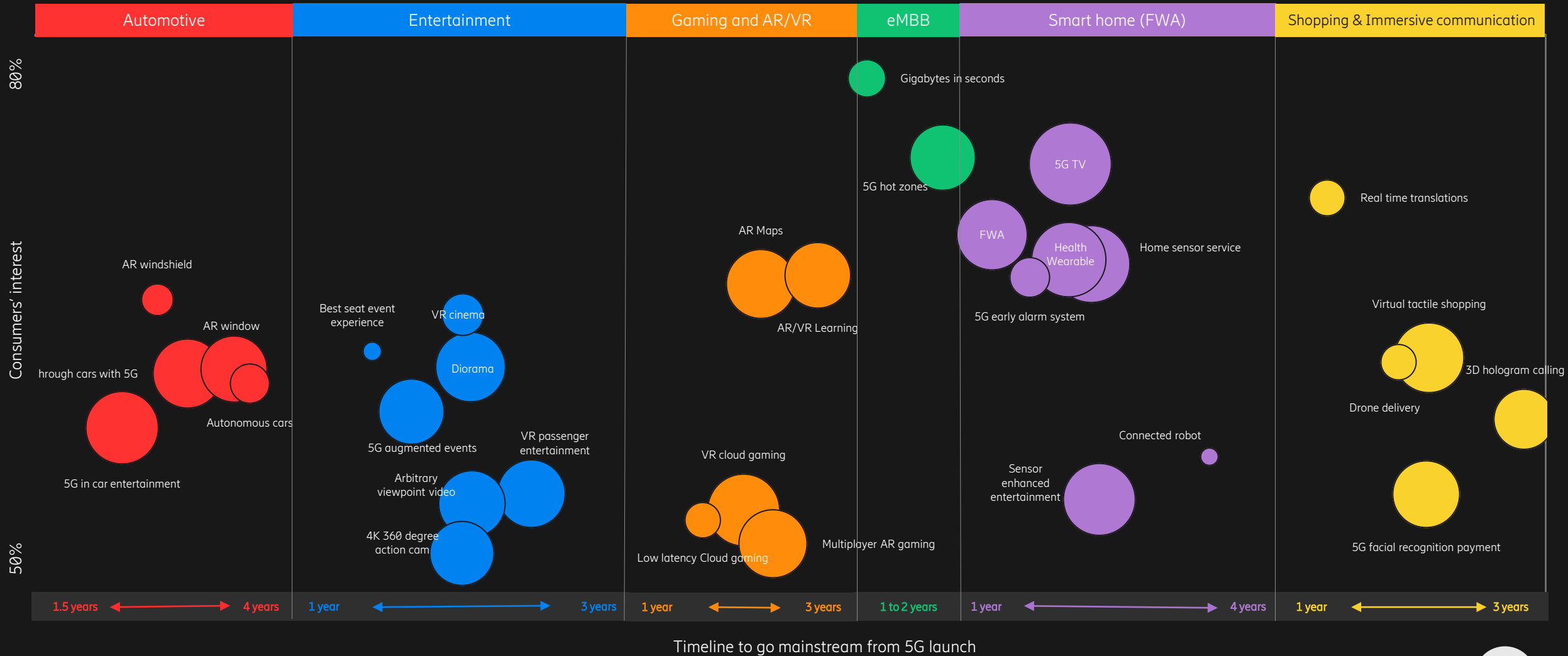


The best of two worlds means:

- AI to analyse and leverage existing data
- Automation of meaningless and effortful interaction
- Humans to leverage knowledge gathered by AI, while adding empathy and emotional intelligence

Future is 5G: Consumer 5G use cases roadmap

31 use cases tested with consumers across six use cases clusters



Base: Smartphone users aged 15-69 in Australia, Argentina, Brazil, Belgium, China, Canada, Chile, France, Finland, Germany, India, Indonesia, Ireland, Italy, KSA, South Korea, Singapore, Thailand, Uruguay, UAE, UK and the USA
 Source: Ericsson ConsumerLab 5G Consumer Potential Study, May 2019

