Deloitte.

The Deloitte Consumer Review
Digital Predictions 2014

A Deloitte Insight report

Contents

Foreword

Welcome to the seventh edition of the **Deloitte Consumer Review.**

In this report we look at four areas of digital technology that we expect will have a significant impact on the digital consumer market in 2014. In doing this we draw upon our 13th Annual UK Technology, Media & Telecommunications Predictions report and consider the implications for the consumer.

Increasing consumer connectivity and product convergence continue to challenge and disrupt the consumer market. Technology trends have become impossible to ignore. Understanding how these trends are developing and will continue to develop becomes a potential differentiator among consumer businesses.

Four key digital consumer trends

1. We predict that 2014 will be the year wearable technology emerges as the next stage in the evolution of mobile technology. Its disruptive impact will be felt in the medium term across the consumer business sector. Smart glasses are expected to be the wearable with the most impact, for consumers and those working in the consumer business space. Smart watches and wristbands will have less of an impact.

2. 2014 is likely to see deeper stratification of the tablet market. The compact tablet (eight inches or smaller) will become the predominant size. Sales of larger, more expensive tablets are flattening, as more consumers opt for smaller and less expensive versions. These smaller tablets address different needs, with entertainment, typically in the form of casual games, at the forefront.

3. The 'converged living room' and the rise of multi-screening pose opportunities and challenges to marketers looking to remain engaged with today's connected consumer. As media consumption fragments and shopping journeys, particularly for larger purchases, become more complex, delivering a consistent consumer experience becomes more challenging.

4. Turning to smartphones, the over-55s provide perhaps the greatest growth opportunity for smartphone sales, with penetration among younger age groups approaching saturation point. However, rising adoption does not necessarily translate into increasing usage. Understanding what is really driving the increase in uptake is essential, as consumer businesses look to tap into this lucrative and currently under-served segment.

We hope this report gives you the insight and data you need to enhance your understanding of consumers and the issues facing your sector, and welcome your feedback.

Nigel Wixcey
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At a glance

WEARABLES: THE EYES HAVE IT

PREDICTION

Smart glasses will be the most successful category of the wearables market in 2014, shipping four million units worldwide and 400,000 in the UK.

IMPLICATION

A more immersive experience for consumers, helping them navigate stores, access product and price information, and make purchases in the blink of an eye. Wearables could revolutionise shopping and customer service.

ONE BECAME MANY: THE TABLET MARKET STRATIFIES

PREDICTION

In 2014, the eight-inch format will come to dominate the tablet market. Smaller, cheaper tablets will account for the majority of growth as sales of larger tablets flatten.

IMPLICATION

More consumers are attracted to the tablet market by smaller, cheaper models, but their usage needs differ from the early adopters. Lower priced tablets will also catch the attention of enterprises as businesses from furniture shops to airlines equip their sales team with tablets.

THE CONVERGED LIVING ROOM

PREDICTION

Global sales of multi-functional devices – smartphones, tablets, PCs, TV sets, video games consoles – will exceed $750 billion in 2014, up $50bn on 2013.

IMPLICATION

Brands are competing for consumers' attention across a range of channels and devices, sometimes at the same time; the living room audience is no longer captive. The key challenge for marketers is to understand to what extent all brand 'encounters' impact the purchase decision-making process.

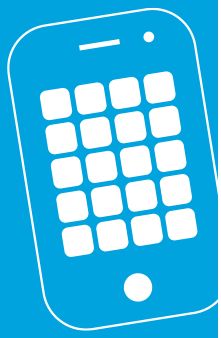
THE SMARTPHONE GENERATION GAP

PREDICTION

The over-55s will have the highest year-on-year rise in smartphone penetration in 2014 and represent an under-served and potentially lucrative market for mobile marketers.

IMPLICATION

Over-55s are forecast to account for much of the growth in the consumer market over the next 10 years, particularly smartphone ownership in the next year. The challenge for consumer businesses is to translate this into increased engagement and shopping.



Digital technology and the consumer

Consumer engagement with mobile technology is driving a digital revolution, changing the way that consumers purchase goods and services.

The digital acceleration

Consumer dependency on mobile technology has increased as improved connectivity has converged with more powerful devices. Sixty-two per cent of UK consumers now own a smartphone and 36 per cent own a tablet. Among younger age groups these figures are even higher.[1]

Not only has consumer ownership of digital devices risen, their usage of these devices has also increased. Around 60 per cent of consumers are using smartphones and tablets to access their social media accounts and the same number are using them to research products and services.[2]

Consumers are becoming increasingly reliant upon their mobile devices, with 66 per cent stating that they have their mobile device with them all the time and 34 per cent agreeing that their smartphone or tablet is the first device they reach for when they want information on a product or service.[3]

The connected consumer now lives more of their life online and on the move. They are surrounded by digital technology and smart devices at home and at work. The average UK consumer now owns 5.4 portable devices, up from 5.2 per cent in 2011.[4] They can shop at any time of day or night and from anywhere. They can respond to advertisements instantly or post a review in seconds.

Digital disruption and the growth of omnichannel
The rise of the connected consumer has disrupted many existing business models. One example of this is that consumers are increasingly coming to expect a multichannel experience.

Constant connectivity through digital technology has given consumers access to real-time information on products, services and prices at anytime from anywhere. This is impacting all stages of the consumer journey, from research to purchase.

The key to success in the digital world is to present a seamless brand experience across all channels. This means knowing who your consumers are, where they are and what they like. This information then needs to be made immediately available to any consumer-facing staff across the organisation.

Historically: Store 1.0

- Consumers went to physical store to purchase products.

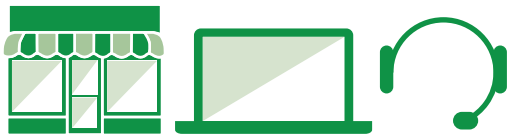
The past: Store 1.5 e-commerce

- Consumers shopped online, either from online store websites or a third-party platform such as Amazon.

Digital evolution – where next?

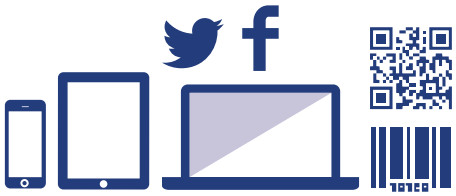
Digital development continues to accelerate. At one end of the scale some businesses will struggle to keep up with this acceleration. At the other end, some are already investing in digital research labs to ensure that they retain a competitive advantage. All consumer businesses are considering how the digital consumer will continue to evolve and what this will mean for patterns of consumption and demand.

In the following sections we make four key digital technology predictions that we believe will have a significant impact on the consumer market in the next 12 months.



The recent past: Store 2.0 multichannel

- Products bought from several independently operated channels e.g. store, e-commerce, m-commerce, or catalogues etc.
- Yet this created higher levels of disruption in the consumer journey with risks of confusion and inconsistency, e.g. price discrepancies between the store and their e-commerce platforms.



The present: Store 3.0™ omnichannel

- All channels and systems are seamlessly integrated to give the consumer a consistent experience.
- The process of blurring the boundaries between channels is accelerated with the rise of connected consumers who interact physically and digitally simultaneously.

Wearables: The eyes have it

Wearable technology, such as smart glasses and smart watches, are the next stage in the roll out of digital connected screens in our private, social and professional lives.

Global revenues for smart glasses, fitness bands and watches should exceed £2 billion in 2014. The UK should account for about 10 per cent of this market. The most successful category, smart glasses, are likely to be priced at about $500 (£300) in the US and sell about four million units worldwide and about 400,000 in the UK. The appeal of fitness bands may be linked to their owners' ability to generate exercise levels worth sharing. As for smart watches, Deloitte's view is that the incremental benefit of having a small, connected screen on a wrist is minor for most. So we expect demand for smart watches to be two million units.

Smart glasses are go

The mass launch of smart glasses in the UK is likely to be met by both skepticism and delight, as is customary with the launch of each new digital form factor. The first models of smart glasses are likely to appeal to and be purchased by a niche, which should number in the hundreds of thousands in the UK, and in the millions worldwide.

This may seem an unlikely outcome for what is considered a new and slightly eccentric product, saddled with significant and fundamental constraints: smart glasses have to be transparent, may never work well in direct sunlight, and, due to their low contrast, are unsuitable for watching TV programmes or films.

Smart glasses should be thought of as the next stage in the roll-out of digital connected screens in our professional, social and private lives. They represent continuity, not a brand new start, much in the same way that tablets were simultaneously new and familiar when launched in 2010.

Smart fitness bands: Moderately healthy

As for the smart fitness band, a form of wearable computing typically worn on the wrist, these should enjoy reasonable demand in 2014; but the market for such devices may never become mainstream in the UK, despite high-profile advocacy. Smart fitness bands measure a range of activities from paces walked to hours slept, and tap into the trend for the 'quantified self', whereby many aspects of one's activity and lifestyle are measured.

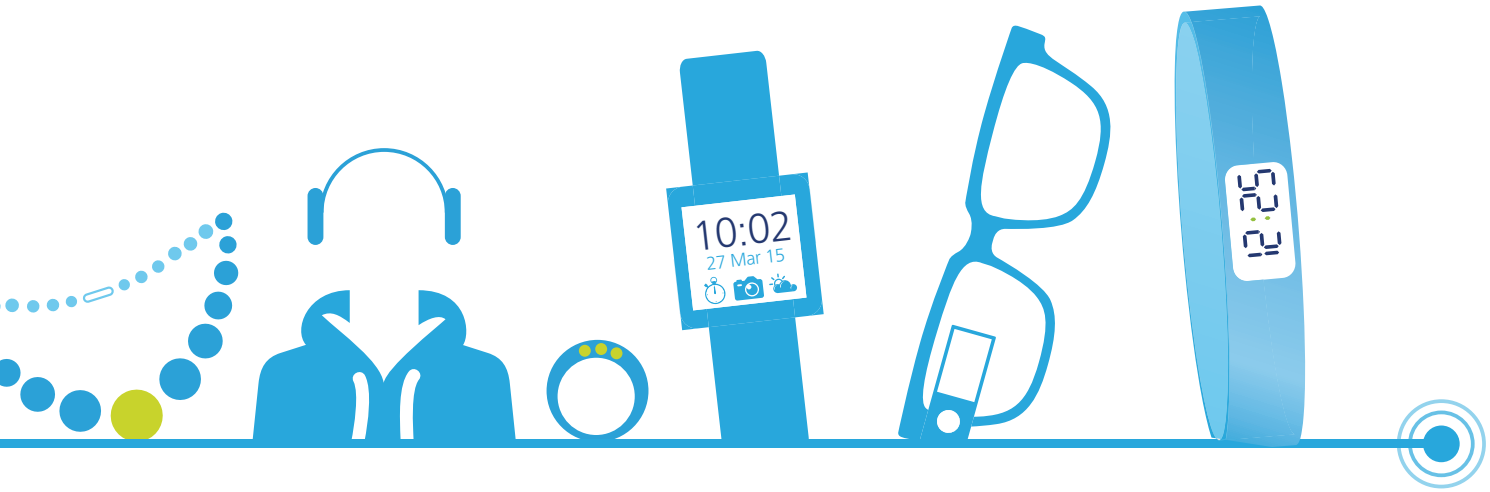
Less time for smart watches

We expect smart watches to remain specialist devices and be outsold by smart glasses over the long term. This may surprise: after all, the value proposition for watches is well-established. People have worn watches to tell the time and display status or wealth for hundreds of years. By comparison, attaching a screen to a pair of glasses and then talking to the device may seem unnatural.

But arguably, checking information on a wrist is a declining practice, whereas putting information in our line-of-sight, either via smart glasses or by placing a smartphone in the field of view, is an emerging one.

Watches mattered from a practical perspective when they were the only way to tell the time. Today, smartphones have assimilated most of the functions of an advanced wrist watch.

If users glance at their smartphone 120 times each day, they already have a pretty good idea what time it is. Further, there are a host of other displays that show the time, from PCs to ovens, and the need for a wrist watch is diminishing especially among young age groups. In a survey of UK respondents in 2010, 14 per cent claimed to have no need for a watch.



Implications for consumer businesses

Wearable technology has the potential to help consumer businesses offer their consumers a more connected, immersive and contextual experience, and one that is in line with their rising expectations.

The consumer is driving demand for wearables. Uptake and engagement with existing mobile devices such as smartphones and tablets have left consumers wanting more and they are in effect waiting for commercially viable technology to catch up.

Deloitte believes that 2014 will be the year that we see consumer businesses begin to deploy wearable technology to provide on demand, context-relevant information and facilitate multitasking for those consumers who are early adopters. There is also a strong business case for enterprise applications. In the longer term this will change the way that consumers shop for a variety of everyday products and services. This year we should see the first steps in this process.

Wearable technology will also begin to change the way that consumers interact with brands, both at home and at the point of purchase. Grocery shopping could be revolutionised by the use of wearable technology. Smart glasses, for example, could provide consumers with price comparison data, product information, details of promotions and coupons in real time. Consumers could also view suggested alternatives if the products they are looking for are not available. Smart glasses would also help them navigate the store and allow them to map their own shop.

The applications extend beyond retail: Virgin Atlantic is trialling the use of smart glasses by its Upper Class cabin crew. Smart glasses give cabin crew real-time information on passengers that will help them to tailor and personalise the experience.[5]

Smart glasses will also become an insertion point for advertising in some cases, but they are more likely to be used to track consumers' engagement with other forms of advertising and allow media companies to charge advertisers accordingly.[6]

Enterprise opportunities also exist for consumer businesses to use smart glasses to improve efficiency and increase productivity. The use of smart glasses would be most relevant for roles or processes that follow a specific checklist. One example might be a consumer product company that wants to streamline its warehouse management process. Another could be a retailer that is looking to improve picking and packing of online orders at a dark store. Smart glasses could provide employees with the data they need to speed up or simplify the task.

For many retailers and consumer product manufacturers, health and wellness remains high on their agenda. Many have developed apps supporting fitness and wellness promotions, as they look to both keep one step ahead of the regulators, while also catering to increasingly health-conscious consumers.[7] Smart fitness bands could provide a natural extension to these apps by allowing these companies to collect more behavioural data on their consumers. This data, combined with their transaction history, can give a more detailed picture of consumers' habits and their health. However, reliance on smartphone apps is an inherent weakness of the fitness band model, and could result in fitness bands being overtaken by developments in smart fabrics and clothing.[8]

The capability of wearable devices is likely to improve exponentially, but expectations should be set carefully. There are fundamental constraints of battery technology, acceptable weight and the bulk of wearable devices. This means that some notions, such as full-screen augmented reality built into a regular pair of sunglasses, priced at £300 ($500), and with integrated 4G is many years off.

As with many digital technologies, there is a danger that the impact of wearable technology in the short term is overestimated, while its impact in the long term is underestimated.[9]

One became many: The tablet market stratifies

The surge in compact tablet sales is accompanying a stratification of the tablet base, similar to that experienced in the smartphone market in the last two years, but possibly more profound.

The compact tablet, with an eight-inch or smaller screen, will become the predominant size of tablet. The surge in sales of compact tablets is driving a stratification of the tablet base, similar but more profound than that experienced in the smartphone market over the last two years. Aside from screen size, tablets are also diversifying by weight, processor speed, memory capacity and price.

In the first quarter of 2014, the installed base of compact tablets will surpass the base of classic tablets for the first time. By the end of Q1 2014, the base of compact tablets is expected to be 165 million units, slightly ahead of the classic tablet base, with 160 million.[10]

Compact tablets will have taken segment leadership within about 18 months of the first mass-market models (sales of at least five million units) coming to market, and within four years of the launch of the modern tablet category.

The decline in average selling prices for tablets has led to a 50 per cent growth in the base of tablets in the UK, with some 12 million tablets sold in 2013. By the end of January 2014, about half of Britons were expected to own or have access to a tablet.

Differences in screen area have major implications on the usability of content: a ten-inch tablet has 50 per cent greater screen area than an eight-inch tablet, and may have double the screen area of a seven-inch tablet.[11] Screen size becomes particularly critical for applications that require form filling, such as e-commerce, and has implications for watching video, with smaller standard-resolution devices less suited to long-form video.

Screen size also has a bearing on the weight of tablet models. The median weight of the installed base of ten-inch tablets is about a third heavier than for eight-inch devices, and about double the weight of a typical seven-inch device.

Compact tablets are generally lower-priced, as vendors of smaller tablets are likely to have different business models than those selling larger tablets.[12] Retailer-branded tablets are likely to be sold at or near cost, with monetisation resulting from product sales generated by the device.

The growing range of tablets is leading to a diversified ownership profile. Owners of the first tablets tended to be relatively prosperous, that is individuals who could afford a £300 tablet in addition to a laptop computer. These individuals had a higher propensity to purchase online. More recent owners of tablets include those for whom the tablet replaces an existing device, such as a handheld games console or a netbook computer.

The widening array of tablet models and prices may also encourage ownership of more than one tablet.

In developed markets, on average 20 per cent of consumers own both a large and a compact tablet. The lower price points of compact tablets also make them more attractive to consumers in emerging markets.

Tablets have gained in popularity with extraordinary speed, and manufacturers will have to work hard to stay on top of the evolution of the market. Getting the balance of form, function and price right will likely be a moving target during 2014, especially at the lower end of the market.

Implications for consumer businesses

Stratification of the tablet product category will require consumer businesses to analyse their data on their consumers who shop via tablets in more detail.

Early adopters of tablets tended to be more affluent consumers with a higher propensity to shop online. This was due to the initial high price points of tablets. With seven-inch tablets now costing as little as £50, they are attracting a different kind of consumer, one who does not have the same appetite or ability to shop, bet or book travel arrangements online.

Stratification of the tablet market will also mean that consumer businesses need to adopt responsive design principles to ensure that their content is displayed in the best light regardless of screen size.[13] For example, in a complex transaction such as booking a flight or holiday online, there are a number of menus to be navigated and payment details to enter. Menus designed for a ten-inch tablet will be difficult to use on a seven-inch screen. PC-based websites could easily be repurposed for larger tablets, but would not work on smaller screens.

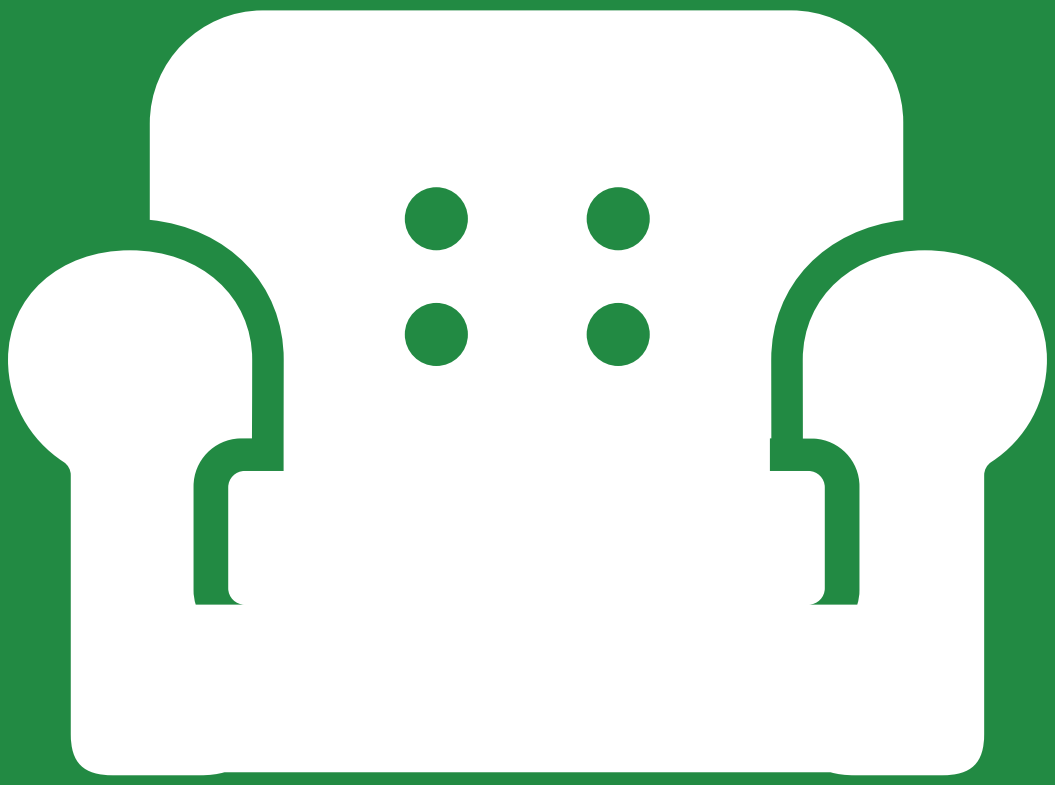
Retailers have embraced tablets to the extent that they are making their own. A process that began with Amazon's launch of the Kindle Fire, has continued with the likes of Argos and Tesco launching their own. These tablets are typically sold at or below cost and come with pre-installed branded apps. The commercial benefit comes from product sales generated by the device. They also serve a role in increasing the number of touch-points that consumers use to interact with the retailer's brand. Ultimately their success in generating additional revenue will depend on the user experience. Other retailers such as Aldi and Asda have also launched private label tablets at low price points (Aldi £79.99, ASDA £99.99). These lower specification tablets are not designed to drive online sales but rather to bring consumers into the store.

Retailers are also increasingly using tablets in-store. Tablets are used to give consumers access to more products than they could otherwise display, or to help manage queues at checkouts by allowing consumers to make purchases for home delivery. Argos is in the process of refurbishing its retail estate to the new digital store format, while high street travel company TUI has recently tested a new concept digital store. Both feature the use of tablets as a means to browse a catalogue in-store and assist consumers with making purchases.

The assumption is often made that all consumers who use tablets to shop at home want content-led apps that encourage browsing. This may be true of many iPad users enjoying the combined benefits of a high resolution screen and a powerful 2GHz processor, but this is not the case for many users of cheaper, smaller-screened tablets who are unable to benefit from this kind of premium browsing experience. However, cheaper tablets will play a role in opening up online shopping to a much broader range of consumers. They will do so by making the more intuitive tablet shopping experience available to more consumers.

As well as transforming the in-store experience, the use of tablets can also improve efficiency across the enterprise.[14] Mobile devices such as tablets can be used to replace paper-based ordering and inventory processes, and equip workforces with real-time information and the ability to access it from anywhere.[15]

The converged living room

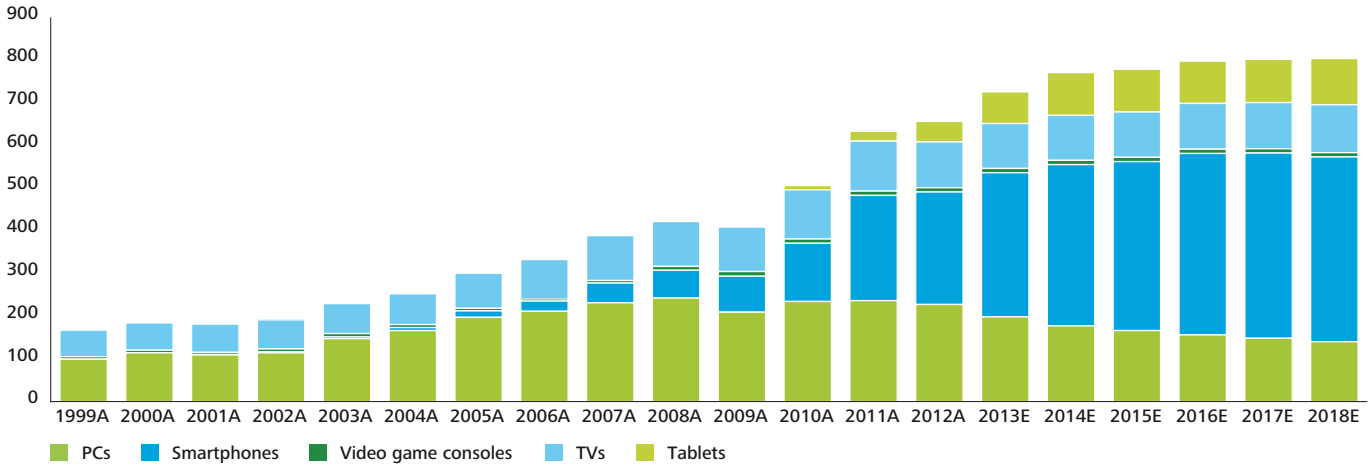


The living room's digital upgrade is now nearing completion; it has become the store at the heart of the home, with multiple shop windows and tills.

Deloitte predicts that global sales of smartphones, tablets, PCs, TV sets and video game consoles will exceed $750 billion in 2014, up $50 billion from 2013 and almost double the 2007 total. Combined global sales of these five products have grown remarkably since 2003, with trailing five year compound annual growth (CAGR) of 6-12 per cent per year over a decade.

However a plateau appears likely: sales are expected to continue growing, but at a slower rate than over the past ten years, with an estimated ceiling of about $800 billion per year. While the installed base is set to plateau, the use and specification of the products will continue to develop.

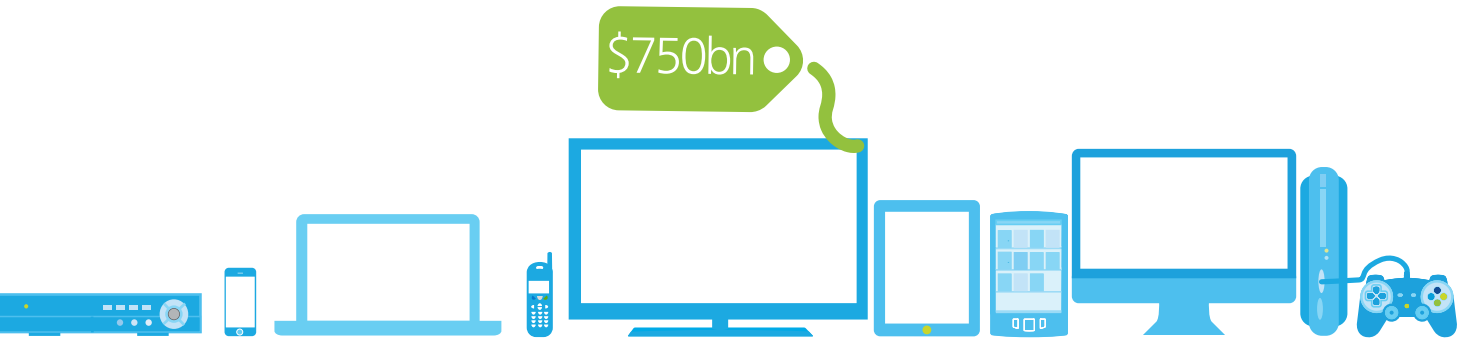
Figure 1. Combined global sales revenues of smartphones, tablets, PCs, TV sets and video game consoles (1999-2018)



Source: Deloitte, 2013

These five categories of consumer electronics devices are closely related in that they are currently the five largest by dollar value, are all multi-functional, and each plays a key role in the consumer's path to purchase. Also, all five of these devices have benefited from common technology such as processors and screens (except for video game consoles, all of the devices make use of high resolution LCD technology).

The years from 2000-14 were a period of extreme turbulence, with nearly all aspects of the living room going digital and getting connected. Sometimes this led to profound changes in usage, such as watching TV with a second screen in our hands. The music industry and video rental industries were transformed, probably permanently. On the other hand, other behaviours did not change much. Minutes of traditional TV viewing have remained about the same, even with the number of people paying for traditional TV growing over the same time frame worldwide.



Deloitte predicts that global sales of smartphones, tablets, PCs, TV sets and video game consoles will exceed $750 billion in 2014.

Implications for consumer businesses

In the converged living room, consumers are more connected than ever and through multiple devices. While sales across all five categories (smartphones, tablets, PCs, TV sets and video game consoles) have grown significantly over the last ten years, mobile devices have been the real drivers of growth.

Consumers are still watching the same amount of TV as it continues to dominate entertainment and advertising. However, they are often doing other things at the same time on second or third screens. The size of the audience may have remained the same but the focus of those watching is more fragmented. The traditional TV audience is no longer passive, and TV advertisers are competing for attention across multiple media. Ninety per cent of all media interactions are now screen-based.[16] It is also an opportunity as consumers can both react to on-screen ads and even, in some cases, interact directly with what they see.[17]

The advent of the converged living room and the growth of multi-screening have changed the way that consumers interact with brands. In the past a consumer would see an advert on TV and then at a later date visit a store and make a purchase. Now they can transact immediately via any one of their connected screens. This can impact the timing of peak demand as the gap between inspiration and purchase is reduced. Consumer brand owners need to ensure that they have the right experience across screens, devices and platforms to keep consumers engaged.[18]

The enduring importance of TV as a medium for advertisers to connect with consumers should not be underestimated. The reach of TV is still far beyond that of other media. Industry commentators have repeatedly called the end of TV advertising, but it remains in good health. Leading retailers, consumer products companies and travel, hospitality and leisure businesses are all spending more on social media and online advertising. However, TV advertising remains a key weapon in their armoury and can in fact have a positive impact on internet search.

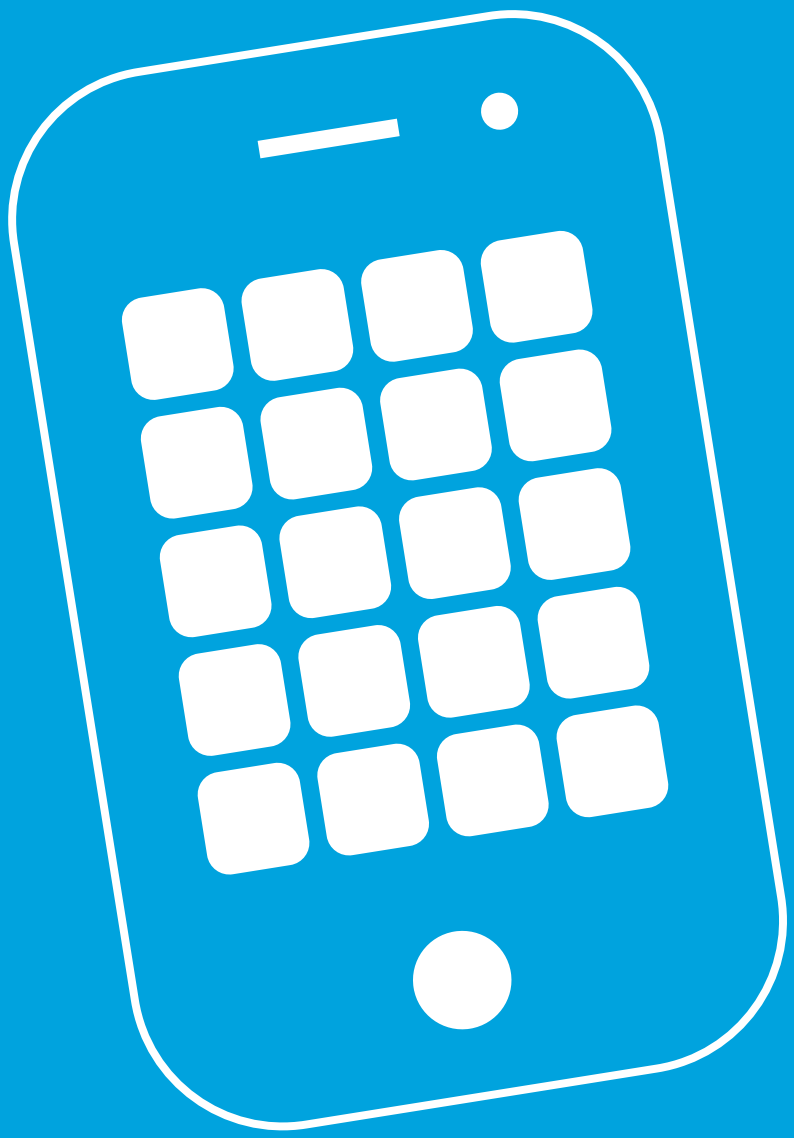
For example, Mondelez decided to switch the focus of its marketing strategy for its Cadbury's Crème Egg brand following two years of declining product sales.[19] The switch was from concentrating on TV to TV plus social media, but with an emphasis on social. The concept described as "storytelling at scale" had one significant difference from traditional social media campaigns: it focused on mass market reach rather than engaging more deeply with a small number of brand loyalists.

The fragmentation of media consumption means that there is no longer a captive audience for TV advertising. Brands are competing for consumers' attention across a range of channels and devices. This highlights the importance of delivering a consistent quality of experience across all devices. Responsive design enables a website to scale and adapt to the size of the viewer's screen.

The key challenge for marketers remains understanding the extent to which all brand 'encounters' impact the purchase decision-making process. To do this they need to consider how different platforms are used across a single consumer 'journey'. They are then better able to ensure that while individual ads are targeted at specific platforms, the overall experience is consistent.

Further convergence of the retail and media industries is expected as retailers become content publishers and media owners become retailers. Media companies have long understood the importance of viewing content as product. Now retailers are beginning to understand the importance of viewing product as content and are rethinking the design of their websites accordingly.

The smartphone generation gap



The difference in smartphone penetration by age will disappear, but the difference in their usage will remain substantial.

The over-55s will experience the fastest year-on-year rise in smartphone penetration. Smartphone ownership should increase to about 50 per cent by year-end, a 25 per cent increase from 2013, but trailing the 70 per cent penetration among 18-54s.

Follow the money: Turning silver into gold

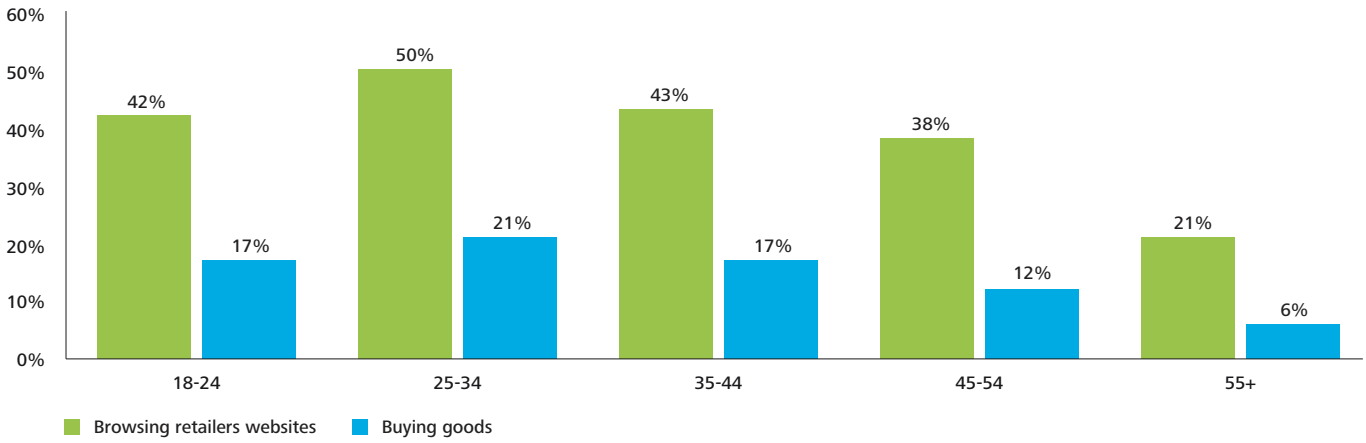
Over a quarter of adults in the UK will be 55 or older in 2014. The attractiveness of the 55+ group has long been recognised: with longer life expectancy, older consumers are likely to continue working, accumulate an ever-greater share of global wealth and be increasingly interested in technology.

This age group – which is likely to continue growing in absolute numbers and share of adults over the medium term – controls more than half (57 per cent) of the UK's wealth, with a median wealth of £431,000.[20] They are not just an untapped market; they are a lucrative untapped market.

Older generations have been slower in adopting PCs and using the Internet. However once the 55+ group overcame their initial lack of confidence, they became and remain enthusiastic users of PCs.

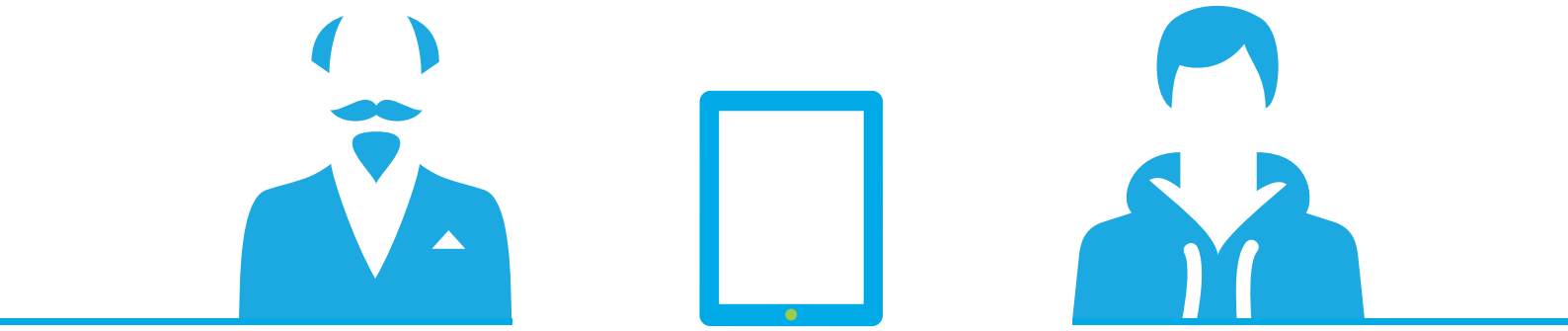
Figure 2. Frequency of smartphone activities

Question: In the last 7 days, for which, if any of the following activities did you use your phone?
Base: (2381) UK consumers who own a smartphone.



Source: Deloitte Research

While ownership of smartphones is highest among the 18-24s, the over-55s represent perhaps the biggest opportunity in terms of growth in smartphone adoption.



Implications for consumer businesses

Older consumers are forecast to account for much of the growth in the consumer market over the next ten years. Retail sales are forecast to grow at an annual average rate of 2.4 per cent to hit £377 billion in 2022, with the over-50s contributing 62 per cent or £49 billion of growth over the same period.[21]

Online has been the fastest growing area of the retail market, up 15 per cent in 2013 compared to market growth of 3.3 per cent[22] and is forecast to continue to outperform total market growth to 2018. Online has also become an increasingly important channel for consumer products companies to sell direct to consumers.[23]

Smartphone and tablet adoption has been one of the key drivers of growth in online sales in the last two years. Mobile devices have created a new channel with mobile commerce sales growing to account for 20-25 per cent of online sales in 2013.[24]

Smartphones also play an increasingly important role in influencing in-store sales by providing consumers with an opportunity to compare prices, research products and interact with family, friends and their favourite brands. Deloitte estimates that the value of mobile-influenced, in-store sales stood at £18 billion in 2013, more than three times the size of the mobile commerce market.[25] Engaging with older consumers via smartphones will benefit not only online but also in-store sales.

The benefit of greater consumer engagement with smartphones extends beyond commerce with mobile devices evolving to become an increasingly important means of taking payment, marketing and rewarding consumer loyalty.[26]

While penetration of smartphones is highest among the 18-24s, the over-55s represent perhaps the biggest opportunity in terms of growth in smartphone adoption.

One reason behind the lack of engagement with the enhanced functionality offered by the smartphone is the lack of apps that are targeted at or take account of the needs of the over-55 consumer. There is an opportunity for retail, travel and consumer brands to fill this void. Consumer brands can drive engagement through their mobile strategies.

One way that consumer businesses can address this is by focusing on issues that interest older consumers. For example, Amazon.com developed the 50+ Active & Healthy Living Store.[27] It offers products from the company's inventory that should appeal to the over-50s, and also incorporates content sourced from Grandparents.com.

Consumer brands have an opportunity to use content to educate and inform over-55s on how apps can play a role in enhancing their experiences. There are some product categories where addressing this challenge is essential, such as healthcare or functional foods. For most other product categories it will become increasingly important as global populations continue to age and the size of the over-55 market grows.

One example of this is the UK women's fashion market where spending by women aged over 50 rose 4.5 per cent in 2013 to £6.7 billion, while spending among the under-50s fell by 1.3 per cent to £9.5 billion. While the under-50s market remains considerably larger than the over-50s, the latter is providing all of the growth.[28]

Customer service is one area where consumer businesses can better serve the needs of the over-55 consumer. Deloitte research shows that a quarter of over-55s prefer to receive advice in-store compared to 16 per cent of under-55s, and more than half like to see a product in-store before they buy compared to a third of under-55s. Therefore we expect to see an increase in the number of consumer businesses offering services such as Tesco's Super Silvers programme. The Super Silvers are sales staff aged over 50, who are trained to serve older consumers and help them to find phones and technology products that better meet their needs.[29]

Endnotes

1. The Global Mobile Consumer Survey, Deloitte LLP, November 2013. See also: http://www.deloitte.co.uk/mobileuk/survey-insights/
2. The Deloitte Consumer Review, Beyond the hype: the true potential of mobile, Deloitte LLP, June 2013.
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Designed and produced by The Creative Studio at Deloitte, London. 33607A