



cutting through complexity

Converged consumer

23.09.2015



Transformation in the digital environment impacts customers' way of living, way of consuming data as well as companies' operating models



Mobility

Social media

Data analytics

Cloud


Global Internet resources



Mind shift of consumers



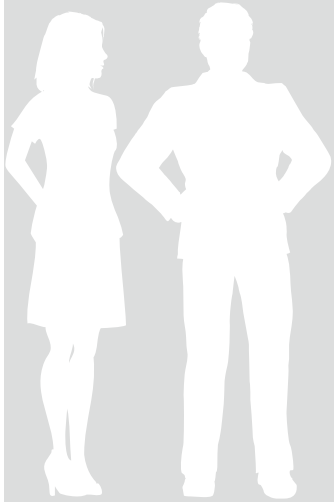
eCommerce



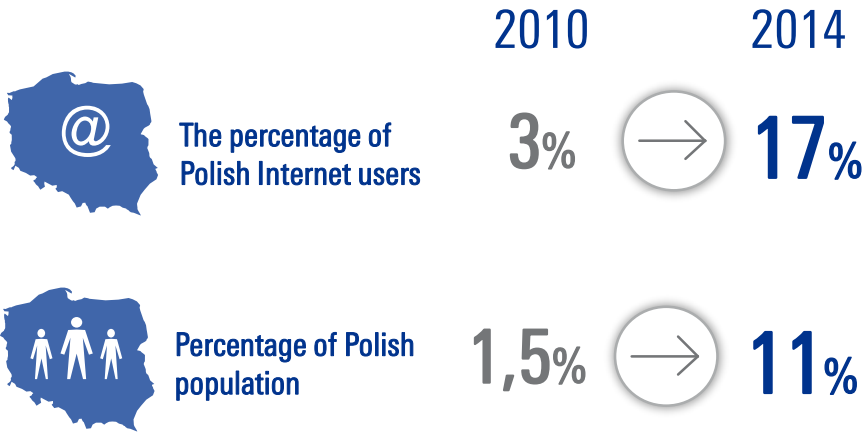
Disruption of operating model

The population of digital consumers in Poland is foreseen to grow rapidly in the 2020 perspective

SHE/HE:



- uses Internet everyday
- uses mobile Internet at least once a week
- uses desktop or laptop or mobile devices



2020



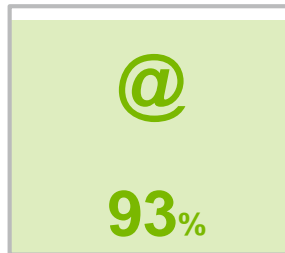
The percentage of digital consumers

>50% of Polish population

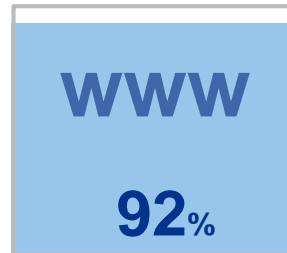
As around the world, Polish Internet users are „staying online” for many different purposes

?

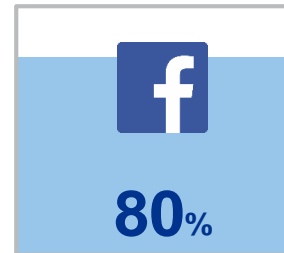
Communication and searching for information



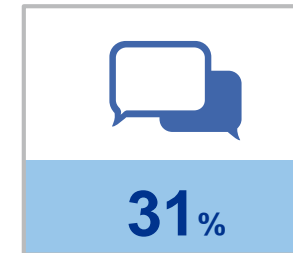
e-mail



Webpages



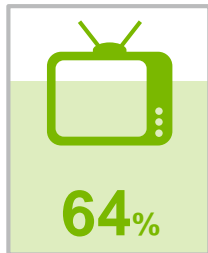
Social media



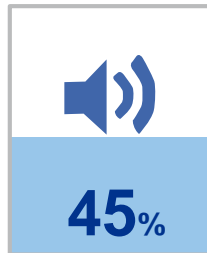
Messengers

?

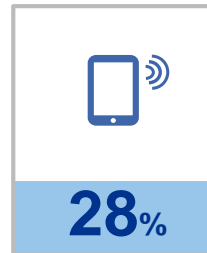
Entertainment



VOD, films
and
programs



Radio &
music



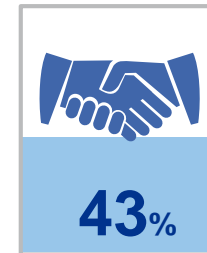
Games

?

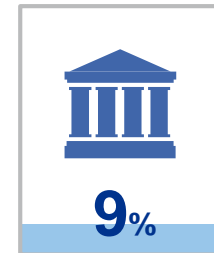
Personal matters



Internet
banking



Online
purchase
and sales



Formal
issues

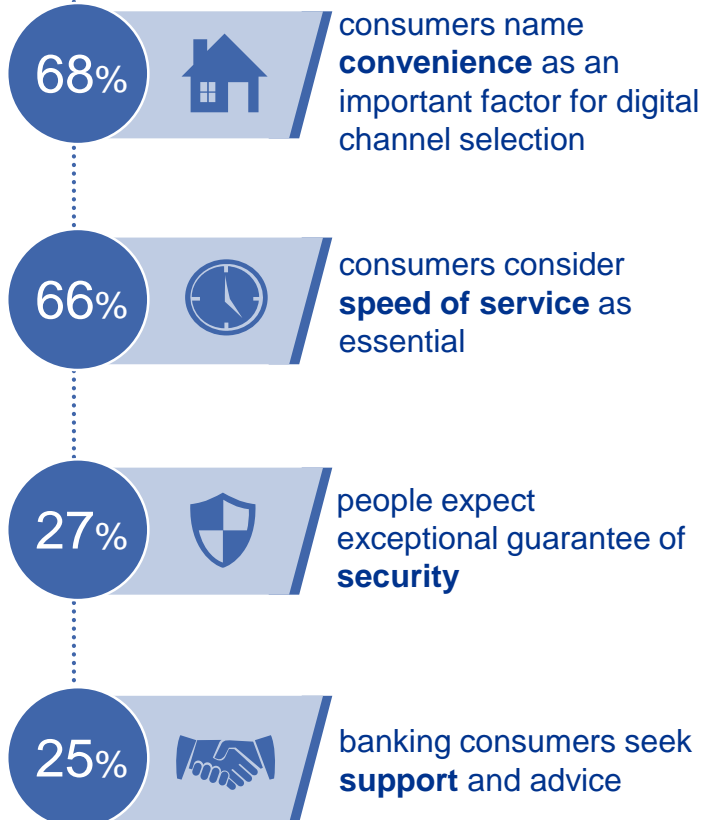
Source: Rynek usług telekomunikacyjnych w Polsce w 2014 roku, UKE

Companies have to face several challenges to understand digital consumer



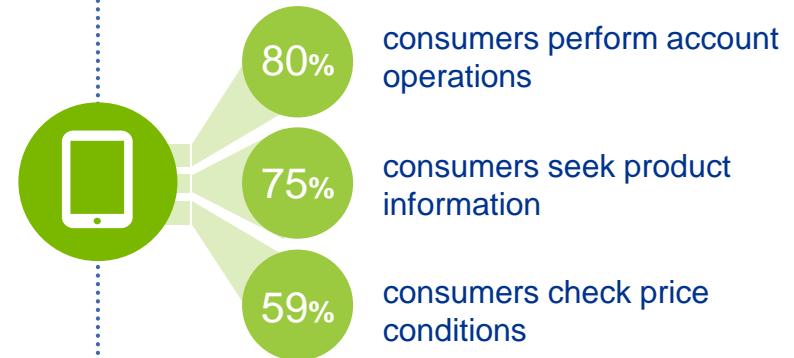
Understanding consumers means identifying their real expectations and actual behaviors

What are the expectations?

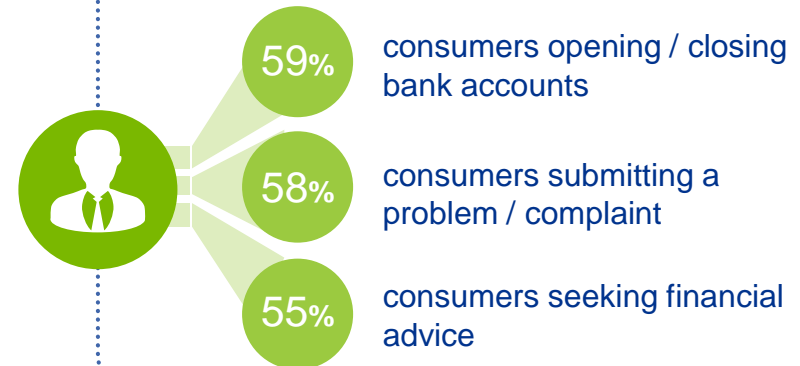


What do we know about the consumer?

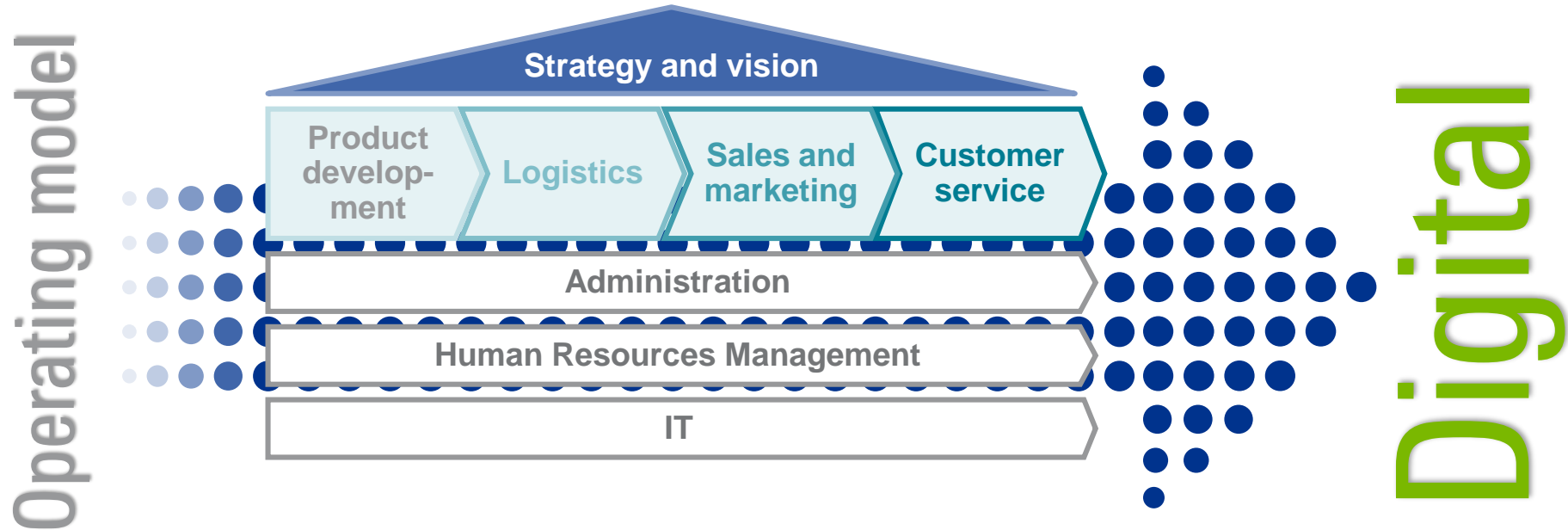
In simple cases, the digital channel is the preferred one ...



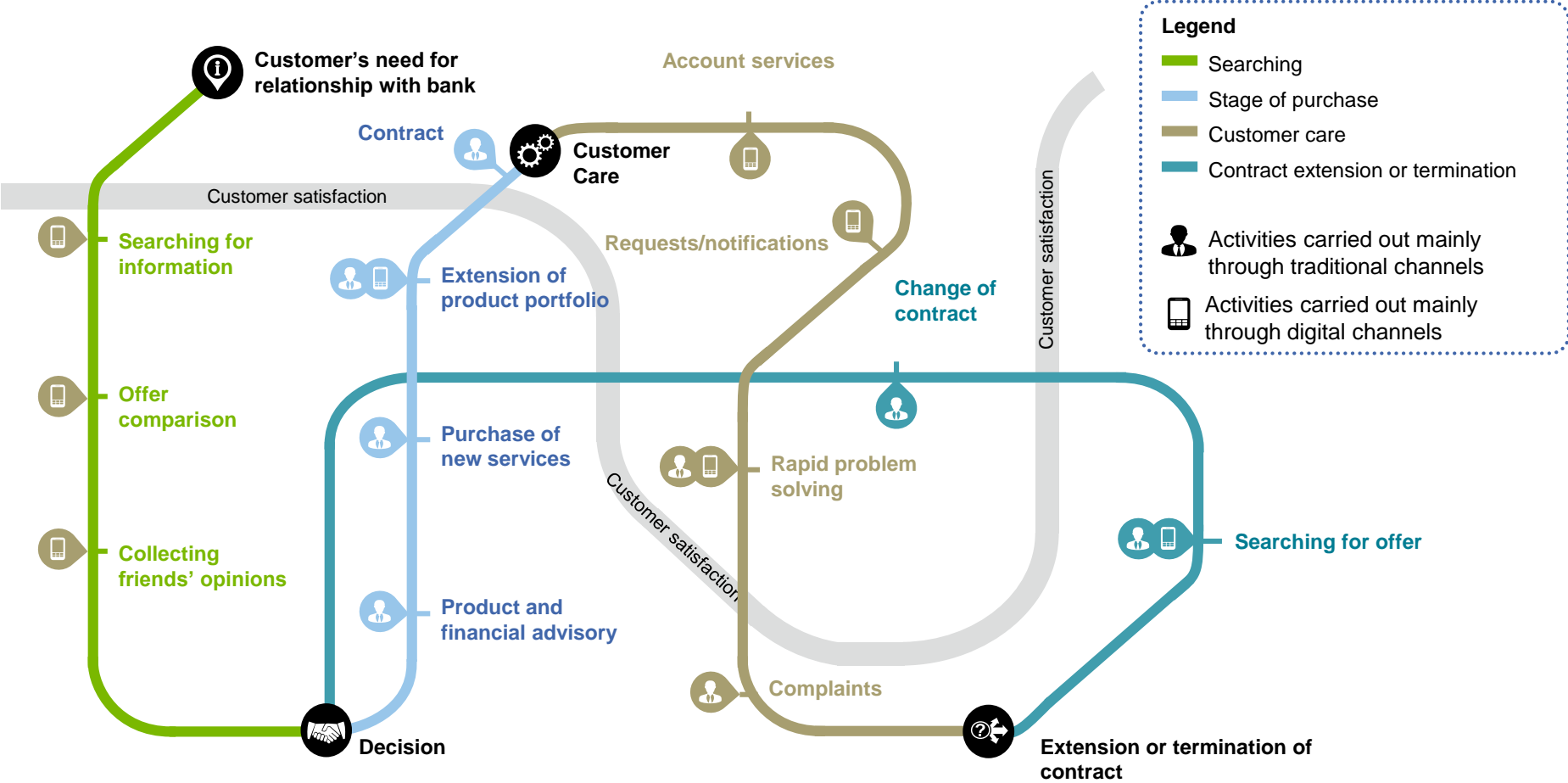
...while traditional channels are preferred for complex issues



Companies have to disrupt their entire operating model to follow the consumers' mind shift



Customer journey can help to understand how the consumers interact with the company, their experience and expectations



Data analytics

Customer purchases, behaviors, conversations, complaints, promotions, preferences, interests etc.

Internal






External



Precise targeting

Moreover, 50% of organizations use data analytics to support pricing decisions

The digital transformation is the driver for points of sales models evolution

	Kiosks	Intermediate variant	Flagships
Objective	<p>Transaction</p>  <p>Acquisition</p>	<p>Transaction</p>  <p>Acquisition</p>	<p>Transaction</p>  <p>Acquisition</p>
Key characteristics	<ul style="list-style-type: none"> • Minimum employment • Low level of expected competences • High level of automation • Only product pick-up – no product showcasing 	<ul style="list-style-type: none"> • Combination of Kiosks and Flagships features • Model dependent on particular sector (type of transactions / acquisitions) 	<ul style="list-style-type: none"> • Concept store focusing on products showcasing • Availability of experts • Personalized approach, maximized scope of products to be presented / tested • Possibility of ordering products • Building brand awareness and experience

Click & collect



Showroom

The mix of traditional and digital channels should offer customers the same experience

Sales and marketing

Customer service



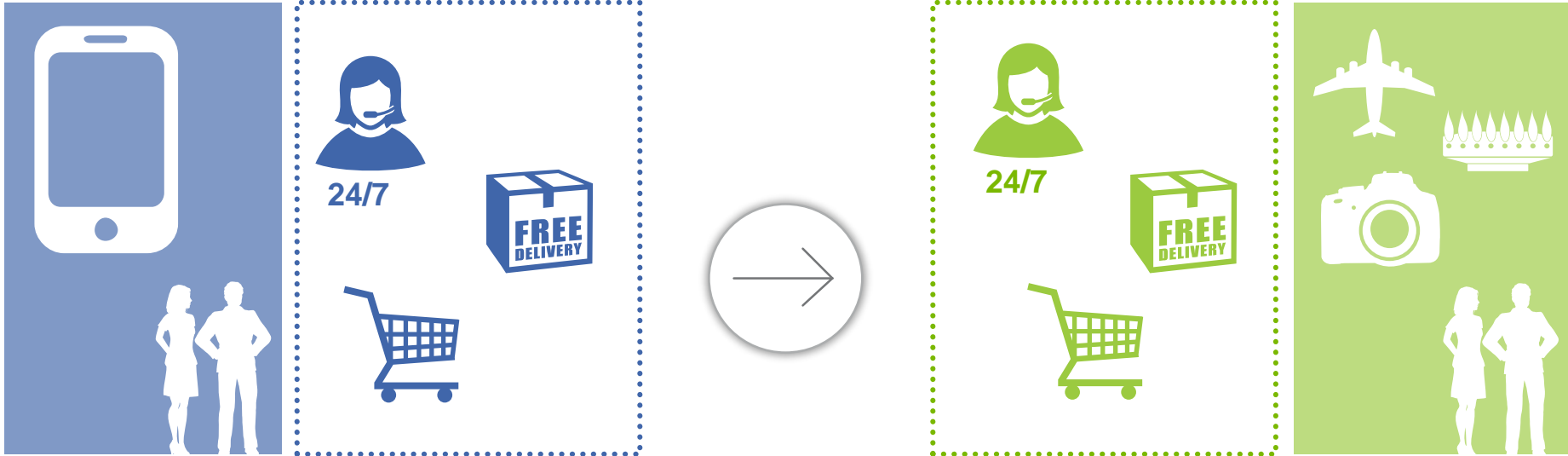
For **47%** of consumers collection at a physical store is essential when buying online

On the other hand, **33%** of retail companies consider omnichannel consumer engagement as the trend significantly impacting their organization

Customers might expect good service experience to be transferred from one sector to another

Sales and marketing

Customer service



...however, solutions that succeed in one country may not be directly applicable in another

Summary

**To understand the customer
&
adapt to the market – culture,
social differentiation**

**To propose digital transformation
for the company in order to:
achieve the results but
prevent overinvestment**

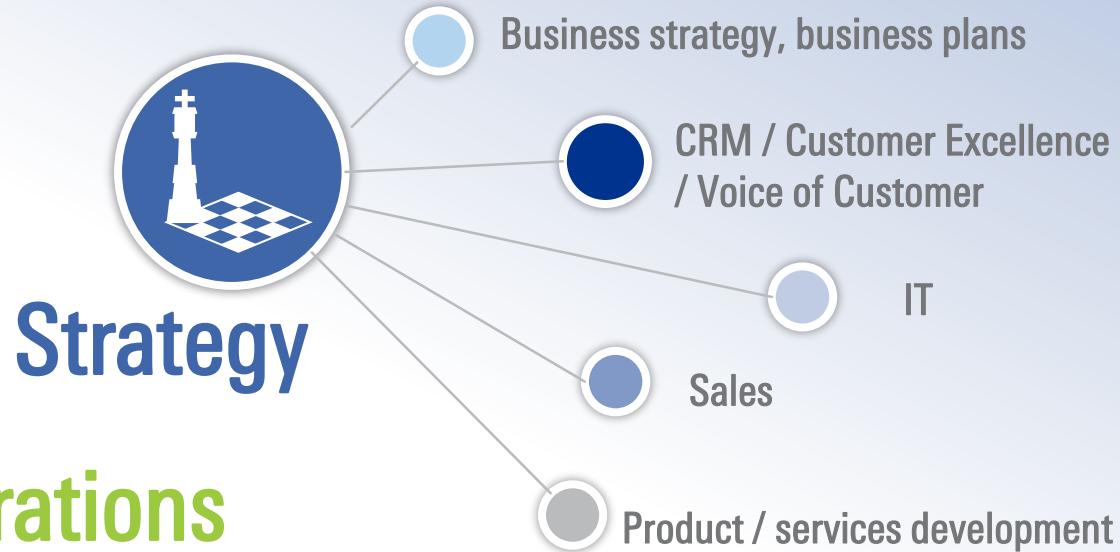


**To align IT functions with
business needs – outsourcing of
IT**

People, people & people

Thank you for your attention

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