

Connected Nation

The digital impact on
buying behaviour

THE PERSPECTIVE SERIES

New insights into the UK workplace

This report is based on an online survey of 720 internet enabled households, complemented by a telephone survey of 160 non-internet enabled households.



Foreword



Phil Mottram
Head of Enterprise,
Vodafone UK

In previous reports in the Perspective series, we've explored how flexible working can be used as a great tool to retain talent and how loss of talent is the biggest unplanned risk to an organisation. We've also covered the role of 4G in an era of instant gratification, how unifying communications can help businesses succeed in a global market and the changing role of the IT director.

Now, in this latest report, we will explore the impact of a hyper-connected nation on consumer shopping behaviours. Not only that, but we have also profiled 'unconnected' consumers and the importance of a seamless omni-channel customer experience.

At Vodafone we've had a front row seat to the growth of a Connected Nation. We've come a long way since the first mobile phone call in the UK was made on our network some 30 years ago. We now have fourth generation mobile network technology (4G), and fixed and mobile communications can now work seamlessly together. We have seen first-hand the power that the Internet and connectivity has had on the ability for us to manage our daily lives, our businesses and our society. Our research found that 77% of people with internet access describe being connected as 'essential' to their lives.

In this report we consider both consumers and UK Plc in equal measure. With a retail estate reaching over 500 stores on the high street we are all too familiar with the need to deliver a seamless customer experience, regardless of whether our customers pick up the phone to their Account Manager, to our call centres, interact online or visit a store. We continue to invest in a customer centric, omni-channel strategy. We want to make sure our customers are at the heart of our business.

Beyond the customer, we need to consider the other critical group of hyper-connected people - 'employees'.

We acknowledge that experiences in our personal lives heavily influence our working day. This has spawned a new generation of connected employees. They're excited by change, and are focused on driving processes and results. We live and breathe this through our own transformation programme that we call 'Better Ways of Working' and we are taking our customers on this journey too.

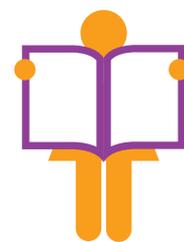
Again, I'd like to say a big thank you to Circle Research and all our contributors for their independent insight and guidance. And of course to all those who took part in the research and shared their ideas and views. We hope you enjoy the results and find the report useful, practical and actionable.

A handwritten signature in black ink that reads "Phil Mottram". The signature is written in a cursive, slightly slanted style.

Phil Mottram
Head of Enterprise, Vodafone UK

More from the Perspective series

The Perspective series gives you fresh insight into the world of work. Find this latest report at www.yourbetterbusiness.co.uk/perspective and for other resources and insights www.vodafone.co.uk/perspective



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Length
30
pages



People
880
surveyed

The people behind it



Andy Mulcahy, Insight Editor, Interactice Media in Retail Group (IMRG)

Andy is editor at IMRG – the UK’s voice of online retail. IMRG is a membership community comprising businesses of all sizes, and supports its members through a range of activities – including market tracking and insight, benchmarking and best practice sharing.



Will Seymour, Senior Editorial Analyst, Future Foundation

Future Foundation is a global consumer trends and insight firm.

Will joined Future Foundation in 2012 and has been looking after the company’s emerging technology trends ever since. He has regularly spoken on the subject of future technological innovations, always questioning how new devices and services appeal to genuine consumer needs.



Patricia Hind, Director, Ashridge Business School

Patricia is Director of the Centre for Research in Executive Development at Ashridge Business School and a Visiting Research Fellow at the University of Stellenbosch. Her teaching and research interests include leadership development, in particular, the role of responsible leadership in embedding sustainable businesses practices in organisations. She has published widely on this and other issues. She is a Chartered Psychologist, a Member of the British Psychological Society (BPS) and the Academy of Management and has been appointed an Associate Fellow of the BPS.



David Langhorn, Head of Sales Enterprise, Vodafone UK

David is the Head of Private Sector Business in the UK Enterprise organisation and has been with the company since September 2014. David will be supporting larger UK businesses to make best use of Vodafone’s converged communications services and find new and better ways of working. To support the increasing demand for Vodafone’s services and to ensure the best possible experience for Vodafone’s larger enterprise customers, David is also leading an ongoing project to expand his team of sales and account managers. David previously headed up AT&T’s UK and Ireland business.



Emma Cerrone, Co-Founder and Managing Director, Freeformers

Emma co-founded and co-runs digital transformation start-up Freeformers. Freeformers digitally transform individuals, teams and companies through immersive hands-on learning experiences. The company was born out of the belief that digital progress should be open to anyone and everyone. For every one business person trained, a young person is trained for free. Those young people then become the trainers, helping transform everyone from CEOs to frontline staff. Emma is 2014 Duke of York ‘New Entrepreneur of the Year’ in the National Business Awards and a Sunday Times Change Maker.

Introduction



There's no denying that we live in an increasingly connected world. Super-fast broadband, smartphones, tablets and the number of social networks all continue to proliferate. 4G mobile internet has arrived in the UK and 'enabling' technologies like cloud computing and the 'Internet of Things' are finally on their way to becoming more mainstream.

Consequently, the picture of a 'hyper-connected' consumer has gained currency in the media and in business. Is this an accurate description of the average person in the United Kingdom today? Just how connected are we in reality? And, what does the reality of our connectedness mean for companies in dealing with people – both as consumers and as employees?

If you'd like to know the answers to these questions, and discover the true state of play of connectivity, then this report aims to outline this for you.

Technology permeates our lives

Our proprietary research has shown that the picture painted of 'hyper-connectivity' holds true in the majority of cases. More than three-quarters of us connect to the Internet every day, and an amazing 77% of the people we surveyed with internet access describe being connected as 'essential' to their lives. Being connected through multiple devices has also become the norm – beyond the standard desktop/laptop, we're connecting via an average of three additional devices – from smartphones and tablets, to smart TVs, games consoles and music devices.

Technology has permeated our social relationships – the vast majority of our social contact is now virtual, with only 27% of the average person's contact with friends made in person. Interestingly, this is viewed very positively – 73% of people say that technology has improved their relationships, and 86% say that it's made them feel more connected to the world around them.

Unsurprisingly, increased personal connectivity has changed our expectations and behaviour in our relationships with brands and companies – both as consumers and as employees.

The importance of omni-channel

As consumers, we expect to be able to interact instantly via the channel and device of our choice – whether that's physically in-store, online, via mobile, or through a social network. Indeed, only 4% of connected consumers make no use of digital technology during their purchasing journeys. For the vast majority, the boundaries between the physical and digital worlds are becoming increasingly blurred – for example, in the last six months one half (52%) of consumers have researched a product or service online using a mobile device whilst in-store.

In order to win with connected consumers, brands need to place them at the centre of their business. They need to leverage data and insight to develop end to end experiences that are delivered seamlessly across all channels the consumer uses to engage with the brand. In other words, brands need to develop a customer centric 'omni-channel' strategy.

New demands on employers

This success will also be driven by a new generation of connected employees – who are excited by change and are continually developing a varied skill set. These employees expect greater recognition, or – more transparency and involvement in driving processes and results. In order to attract and retain this talent, businesses will have to evolve company culture and leadership styles in line with their needs and aspirations.

The Unconnected

A note of caution should be raised though, given that a significant minority (16%) of UK households are 'unconnected', with no fixed internet in their home. While just over one third (36%) of them cite cost as the reason, most are unconnected by choice, saying their either don't want or don't need a connection. The presence of this group further reinforces the need for a balanced omni-channel approach, based on detailed understanding of the needs of different customer segments.

The report and perspectives

We invite you to read on to discover the research findings and implications for your business – as well as the perspectives and experiences shared by our contributors Andy Mulcahy (IMRG), Will Seymour (Future Foundation), Patricia Hind (Ashridge Business School) and Dave Langhorn (Vodafone UK) – all experts in different aspects of digital connectivity. Also, read on to see some top tips on how to serve the Connected Nation.

We're sure you'll find insight to help your business thrive in an increasingly hyper-connected world.

Research

76% 
OF UK ADULTS
ACCESS THE INTERNET
EVERY DAY¹

HOW CONSUMERS **FEEL**
 WHEN INTERNET
 CONNECTION **GOES DOWN**



FRUSTRATED



ANGRY



ANNOYED



LOST

“At Future Foundation, we have identified the desire for control as the key force operating on today’s consumer; and as we continue to accelerate into the digital age, our capacity to control our connected lives becomes ever more acute.”

Will Seymour,
 Senior Editorial Analyst,
 Future Foundation

Leveraging a hyper-connected society

Britain is a hyper-connected nation. Communications technology has put us in touch and in control like never before, giving us an enhanced window on the world around us. It lets us communicate with others whenever we want, wherever we are, using whatever format we like. It instantly furnishes us with information on almost any topic imaginable. It even changes the relationship we have with the machines around us by letting us control and receive feedback from them.

Hyper-connectedness has significant implications for organisations like yours. That’s because hyper-connected people want to deal with hyper-connected organisations. They expect a highly responsive, information rich experience, delivered through multiple channels in a joined-up manner. As we’ll see, that’s not just a point of view, it’s a fact.

OFCOM: European Broadband Scorecard²

	Uk	Germany	France	Spain	Italy
Fixed broadband connections per 100 households	82 (2 nd)	83 (1 st)	74 (3 rd)	65 (4 th)	51 (5 th)
Superfast broadband connections per 100 households	9 (1 st)	5 (2 nd)	3 (4 th)	4 (3 rd)	0 (5 th)
Mobile broadband connections per 100 people	89 (1 st)	45 (5 th)	48 (4 th)	73 (2 nd)	66 (3 rd)

Our survey of 720 internet-enabled households illustrates just how important connectivity is to them. Having a fixed home internet connection is no longer viewed as a luxury by the average person, but as an absolute necessity. An amazing 77% describe their home internet connection as essential. Ask them how they felt last time their internet connection went down and the language used belies just how important connectivity is to them. *Frustrated, angry, annoyed* and tellingly, *lost* are the most common words used.

Connectedness has implications beyond our personal lives that organisations must take into account when dealing with their employees too. Expectations in the workplace are based on consumer experiences, and hence the same frustrations apply when these are not met in a professional context.

Hyper-connectedness also enables modern working practices. As revealed in the previous ‘Perspective’ report, The fluid society (downloadable [here](#)), remote working is fast becoming the norm. Nine out of ten (86%) organisations experience employee demand for remote working options, and six out of ten (60%) equip their employees with these options.

JUST **27%** 
OF THE AVERAGE PERSON'S
CONTACT WITH FRIENDS IS
IN PERSON. THE MAJORITY
OF SOCIAL CONTACT IS
NOW VIRTUAL



21% 
IS BY PHONE

17% 
THROUGH EMAIL

15% 
BY SOCIAL MEDIA

14% 
INTERNET PHONE / VIDEO

4% 
VIA ONLINE GAMING

2% 
OTHER

The Internet is integral to maintaining our social fabric

- 71% use the web to keep in touch with friends and family, and spend an average of 4 hours a week doing so
- 75% use it to keep up-to-date with the world, and spend an average of 3 1/2 hours a week doing so

Rather than becoming slaves to technology, people have embraced it through choice. 73% say technology has improved their relationship with friends and family, with one third (32%) going so far as to describe this as 'significant'. And 86% say that technology has made them feel more connected with the world around them.

The importance of technology in enhancing social links becomes even more evident when we look at exactly how people keep in touch with friends and family. No longer are they reliant on finding time to meet face-to-face, with just 27% of the average person's contact with friends happening in person. Instead the vast majority of social contact is now virtual.

- 21% is by phone
- 17% is through email
- 15% is through social media such as Facebook
- 14% is through internet phone or video such as Skype
- 4% is through online gaming

The mix of communication used shows just how dynamic the situation is. One third of social contact is now through social media, internet calls and online gaming channels that have only emerged relatively recently.



THE AVERAGE PERSON HAS 3 OTHER DEVICES IN ADDITION TO THEIR COMPUTER

Multiple devices are the norm

As technology plays such a critical role in the modern world, people are surrounding themselves with multiple devices. Alongside the standard Internet/PC/laptop, the average person who has an internet connection now has three other devices that allow them to connect to the web.

- 82% have a smartphone
- 64% have an internet enabled tablet
- 46% have an internet enabled games console
- 34% have a Smart TV
- 19% have music devices connected to the Internet

Our use of multiple devices drives an expectation that we should be able to interact via the channels of our choice at our explicit moment of need. To be most effective, organisations and brands need to plan for the range of different needs when undertaking a task. And that's whether researching a product to buy, or working on the move. The focus must shift from the needs of the device to the needs of consumer.

In addition, if we look at how these devices are used we can see just how hyper-connected the typical person is. Rather than use technology in isolation, they will multi-screen. A study by Google identified the two main ways they do this³.

- Sequential: where they move from one device to another to accomplish a task
- Simultaneous: where they're using more than one device at the same time for either a related or unrelated activity

28% of UK consumers report that when using the Internet on their smartphone they are also usually using the Internet on another device.

Our hyper-connectedness doesn't stop there. Not only is the home equipped with devices that allow humans to connect with the outside world, the home itself is increasingly connected. One in ten (11%) homes are now able to manage services like security cameras, heating and even entertainment remotely.

While increasing connectedness has many benefits for our relationships with each other, we must also be aware of certain risks. Threats such as identity theft and cyber-attacks will require increasing vigilance as our connectedness grows. Fraud and cyber-crime already cost the UK economy an estimated £52 billion every year⁴. Worryingly part of this money is being used by criminal networks to fund drug smuggling, terrorism and human trafficking.

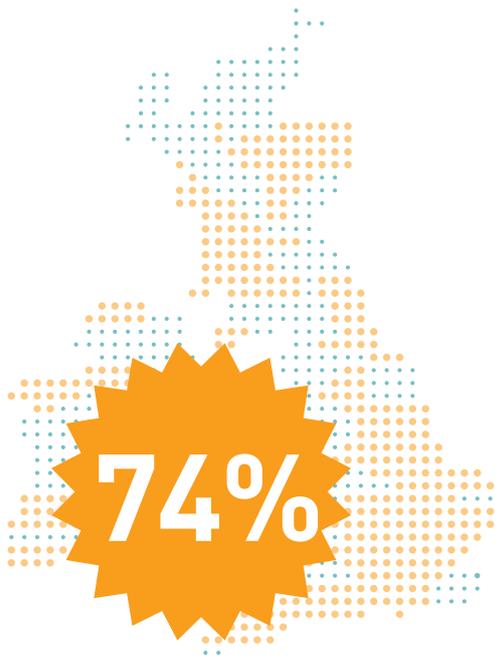
Regardless of the risks, the fact that we are more connected than ever before is clear, and it's only set to increase in significance over the coming years. What are the implications for us as consumers?

“The 2015 Consumer Electronic Show (CES) in Las Vegas demonstrated a range of tech that will soon connect your car to your home to your baby. Our sphere of personal control gets greater.”

Will Seymour,
Senior Editorial Analyst,
Future Foundation

³ Google, The World has gone Multi-screen, 2013

⁴ National Fraud Authority, Annual Fraud Indicator, 2013



74%
PERCENTAGE OF UK ADULTS WHO HAVE BOUGHT ONLINE⁵

Driving success through omni-channel

What does hyper-connectivity mean for the modern organisation? The implications are diverse and potentially game-changing. It impacts:

- the nature of the product or service (online consumption in real-time)
- the pricing model (pay-per-use rather than full ownership)
- how marketing messages are communicated (integration across multiple media)
- where marketing messages are communicated (in game)
- customer service (self-service options).

The most fundamental of these implications is the need for a truly omni-channel approach. Take retail as a case in point (although these learnings can be applied to all sectors where some kind of customer interaction is necessary). When buying something that's available online and in-store, consumers fall into three behavioural groups.

- Half (53%) are Digitals. They will research and buy entirely online wherever possible
- Two fifths (43%) are Clicks & Bricks. They either research online then buy in-store (37%), or research in-store then buy online (6%)
- A tiny proportion, just 4%, are Traditionalists. They will research and buy entirely in-store wherever possible

Three consumer behaviour groups



As the Clicks & Bricks segment illustrates, the boundaries between digital and physical are blurring. High speed mobile internet is accelerating this trend and making the boundaries even less distinct.

⁵ Source: Office of National Statistics.

⁶ Source: Office of National Statistics.

⁷ Source: Office of National Statistics.



52% OF CONSUMERS HAVE RESEARCHED A PRODUCT ONLINE USING A MOBILE IN-STORE IN THE LAST 6 MONTHS.

OPTICAL EXPRESS CENTRALISED APPOINTMENT SYSTEMS TO INCREASE EFFICIENCY

The Optical Express Group's portfolio includes laser eye surgery, private dentistry, healthcare services and cosmetic surgical and non-surgical treatments, as well as maintaining the core optics division of spectacles and contact lenses.

Optical Express changed provider, opting for complete solution with fixed and mobile. A centralised diary appointment system runs over the network and when the call centre makes contact with a customer, they book an appointment which is immediately available to store staff. This allows the management team to manage the appropriate level of resources within each store.

"The optometrists work paperlessly using our Patient Management system, and can securely retrieve patient information in any of our 200 clinics, making their work faster and more efficient."

Craig Duffy,
IT manager,
Optical Express Group.

Staff have been equipped with smartphones, so if they're on the move they can respond easily. The company also runs its Electronic Medical Records system over the network. This tracks every aspect of the tests, images and measurements that its optometrists undertake for customers, enabling secure access of data for the appropriate people irrespective of location.

A BLUEPRINT FOR CUSTOMER SERVICE SUCCESS



- 1.1 ABOVE ALL, CUSTOMER SERVICES NEEDS TO SATISFACTORILY RESOLVE THE ISSUE
- 1.2 IT NEEDS TO BE HIGHLY RESPONSIVE AND MINIMISE THE EFFORT THE CUSTOMER NEEDS TO PUT IN
- 1.3 IT NEEDS TO BE DELIVERED BY STAFF WITH THE EXPERTISE, UNDERSTANDING AND AUTHORITY TO RESOLVE THE ISSUE SATISFACTORILY
- 1.4 IT NEEDS TO TAKE FULL, UN-QUALIFIED OWNERSHIP OF THE ISSUE, AVOIDING PASSING CUSTOMERS FROM PILLAR TO POST

SOURCE: PERSPECTIVE SERIES, HAVE A NICE DAY!

In the last six months one half (52%) of consumers have researched a product or service online using a mobile device whilst in-store.

Even traditionalists are changing their behaviour – although their preference is for the physical, one third (32%) have used a mobile device to research whilst in-store.

After the purchase, even if this was made in-store, a joined up approach is still necessary. Just 13% of consumers want to lodge a complaint or issue in person. The majority would prefer to:

- raise it by email or online message (45%)
- by phone (25%)
- by live web chat (9%)
- or through social media (5%)⁸.

Omni-channel sales, marketing and service strategy is no longer an option, but a necessity for any organisation who wants to remain relevant in the modern world. The critical word here is 'omni'. Traditional channels shouldn't simply be replaced with digital channels, but each should:

- work seamlessly with each other
- augment the other wherever possible
- be able to operate in complete isolation from the other if desired.

The human touch however remains important. 47% of people want to speak to someone in person, either in-store, over the phone or via live web chat.



A true omni-channel approach is in every aspect of business

Just setting up multiple channels for engaging with customers isn't sufficient for success. A true omni-channel approach impacts human resources, technology, supply chain, data and company culture. Placing the customer at the heart of the business, and being able to aggregate customer and inventory data across channels will be key in developing best-in-class, end-to-end, customer experiences.

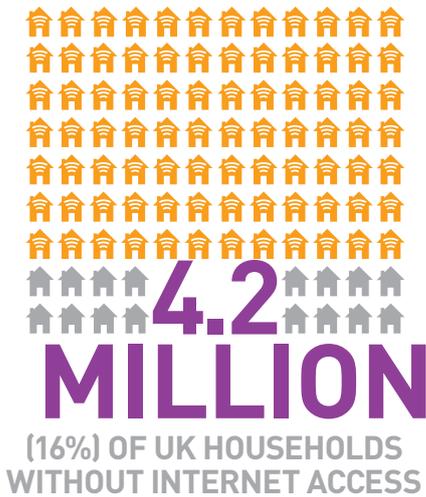
A great example is John Lewis. They've implemented a number of initiatives to appeal to connected shoppers. It has expanded its fulfilment options by opening a dedicated 'Click & Commute' shop in St Pancras station. It has made digital enhancements to its stores, equipping salespeople with transactional tablets, and was the first major department store to use Google to map the inside of their Oxford Street shop. It has also trialled innovations such as an app for shoppers to visualise different shapes of sofas in a range of colours. All of which has contributed to positive revenue growth, particularly from the online channel, which accounted for £1.1bn in the past financial year – year on year growth of 25% and now representing a third of total sales⁹.

However, it's important to consider that not all consumers are represented by this profile of a 'hyper-connected' shopper. Indeed, 16% of UK households have no access to the Internet. Neglect them, and your target market has potentially shrunk. That could be a large slice of revenue, so let's explore whether the unconnected are relevant to you.

“So who might be those employees who survive and prosper in this hyper-connected world? Those who are successful do so because they bring a mind-set of fluidity and pro-activity to their careers. No longer linear, reactive or predictable these careers are characterised by change and energy.”

Patricia Hind,
Director, Ashridge Business School

Connecting with the unconnected



It may come as a shock to you that 16% of UK households (4.2 million) have no internet connection at home⁹. 83% of those we surveyed who do have an internet connection feel it is an issue, with 1 in 7 (14%) describing it as a 'major issue' and one quarter (23%) going so far as to call it a 'national embarrassment'. As we've already seen, the Internet is perceived to be critical to social networks and society. To be cut off from this is, the connected believe, a significant disadvantage. They suspect that the 'unconnected' miss out on life opportunities (55%) and are more likely to be socially isolated (44%). Is this fair?

From a business perspective there are important implications too. Any omni-channel strategy needs to be truly cross-channel if businesses want to keep the unconnected as potential customers.

A portrait of the unconnected

To explore the moral and practical case further, we conducted a separate survey of 160 households with no internet connection. The results are revealing and challenge conventional wisdom.

The first learning is that certain sections of the population are much more likely than others to be unconnected. Perhaps unsurprisingly:

- they tend not to be working – 26% are retired and 31% out of work
- they tend to have a lower income – 70% have an annual income under £15,000
- they are more likely to live in rural areas – 32%
- they tend to be older – 19% are aged over 69
- they tend to live alone – 53% live alone.

If these demographics are in your target market then the flavour of any omni-channel strategy should be weighted towards traditional channels. If they're not, then the weight can be placed evenly or on the digital side.

The second learning is that most are actually unconnected through choice.

- One third (36%) cite cost as the reason they don't have an internet connection
- The majority (62%) say they don't want or need an internet connection
- That's a lot of people – around 2.6 million households in total who don't want or need the Internet

“Backing up the Connected Britain report, Ofcom's latest research shows that in just one year the change in the number of people who say cost is a major reason they don't use the web jumped from 22% to 32%. Times are tough, and the Internet is not as important as, say food or heat.”

Helen Milner,
CEO & Staff Board Director,
Tinder Foundation

RURAL SHETLAND VILLAGE GETS ONLINE

The Rural Open Sure Signal (ROSS), can be an alternative way rural communities can get internet access. The west Shetland village of Walls is one of the most remote communities in the UK. With a population of around 300, it sits at the head of the beautiful Vaila Sound, and for centuries has provided a safe haven for sailors. It is also home to one of Scotland's many thriving sea fishery businesses. The Tait family has been operating Shetland Mussels since 1987 and have an international reputation for producing some of the tastiest mussels in the world. Each year they produce almost 1,000 tonnes and their business provides employment for local people and is an important part of Scotland's £5million mussel fishing industry.

Unfortunately, the lack of a mobile phone signal was making it increasingly difficult for CEO Michael Tait to maintain contact with his customers and colleagues. Despite huge investment in mobile technology and infrastructure in the UK in recent years, Walls was in a so-called 'not-spot', the two per cent of places in the UK that were geographically impossible for any mobile phone signal to reach.

The answer for Shetland Mussels has come in the form of the Rural Open Sure Signal product (ROSS), which creates 3G signal in areas that are suffering from connectivity problems. Together, Ian Walterson from the Walls Community Council and Michael Tait mustered the support of local people, MP Alistair Carmichael and MSP Tavish Scott to put forward a case for Walls to be included in the Vodafone trials of Open Sure Signal.

"Rural communities such as ours can suffer from being mobile not-spots'. I do understand that it's not always economically viable to invest in major infrastructure in remote areas – but at the same time our needs are the same as the rest of the country." ¹²

Michael Tait,
CEO,
Shetland Mussels

Naturally though even the unconnected need to get online sometimes. When these situations arise one of two solutions is typically used – 46% go to a community building (e.g. library, community centre) and 44% use a smartphone.

The implication for businesses here is that digital engagement with the unconnected is still possible, today if geared towards mobile.

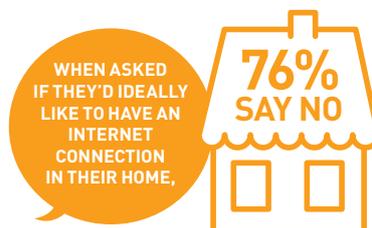
It is predicted that smartphone penetration in the UK will reach 100% by 2018.¹⁰ However, despite increased smartphone penetration, the majority of new phones go to those who already have one. Deloitte predicts that in 2015, 90% of smartphones sold in 2015 in the UK will be to existing smartphone owners.¹¹

"We're not missing out" say the unconnected

The third and perhaps most revealing learning is that the unconnected tend not to feel disadvantaged by their situation.

- 71% don't believe it makes them any more likely to be socially isolated
- 58% feel they don't miss out on any work or life opportunities because of it
- Of those that once had an internet connection (19%), just 7% regularly miss having it now

So the picture that emerges is not one of people frustrated at being left behind. The majority are not only quite happy with the situation, it's one they actively choose to be in.



This suggests that businesses need to accept that this particular segment of the population, and it is sizeable, will remain a feature of the landscape for some time to come. The question is whether they are in your target market and if so, how to ensure your omni-channel strategy is suitably balanced to keep them engaged.

11 <http://www.mobilesquared.co.uk/blog/uk-mobile-smartphone-forecasts/>

12 <http://www.deloitte.co.uk/tmtpredictions/one-billion-smartphone-upgrades/>

13 http://www.vodafone.co.uk/cs/groups/configfiles/documents/webcontent/pdf_shetland_mussels.pdf

THE CONNECTED SHOPPER

With the many ways people shop these days, brands need to be omni-channel to be successful³

Connected Britain
THE PERSPECTIVE SERIES



60% OF ONLINE SHOPPERS STILL VISIT STORES

- To see the product in real life..... 86%
- To see any special offers..... 50%
- To check prices..... 48%
- To ask advice from salespeople..... 22%
- To purchase..... 27%

30% OF SHOPPERS USE MOBILE DEVICES IN-STORE

- To compare 18%
 - To ask advice & opinions of others 12%
 - To look for product info 10%
 - To check availability in other stores 10%
 - To take photos of the product 10%
- 60% are impressed by the offers they receive on their phones

THE AVERAGE BRITON HAS 3 DEVICES IN ADDITION TO A PC

The most common being¹



SHOPPING BEHAVIOUR

- 96% of shopping journeys have a digital component¹
- 74% of UK adults have bought online²
- 3.75 – average number of online purchases a month³

SOURCE

1. Connected Britain report
2. ONS
3. Geometry Global Connected Shopper study

1

Seamless digital and physical customer experience:
Always plan for the range of different devices and shopper and service channels used by customers, their experience with your brand is key.

2

Keep shopping secure:
Remember to build your m-commerce and e-commerce security strategy to protect data against identity theft and cyber attacks.

3

Omni-channel applies to aftersales too:
It's important that you don't neglect a seamless service experience post sale.

TOP 3 TIPS

Perspectives



Andy Mulcahy
Insight Editor,
IMRG

Why omni-channel matters

When many high street retailers first launched online arms, in many cases they were set up as completely separate businesses. Conversely, many online retail businesses were also established without knowing that they would one day transition to the high street.

Viewed in those early days by some boards as a bit of a distraction from the main high street operation, they nonetheless felt the need to do something in the digital space as shoppers were beginning to visit online stores in increasing numbers.

Over subsequent years, online retail has often been conveyed as a disrupting influence – ‘decimating high streets’ and ‘cannibalising sales’ from high street stores. While this impression still prevails, intervening years have introduced a range of new channels and devices that have made digital far more relevant in what are seen as traditionally ‘offline’ environments. Technology has changed shopper behaviour at a remarkable rate and the digital and physical worlds have become increasingly blurred, with the channels offering opportunities aplenty to complement each other in ways that can greatly drive sales and engagement.

Which is where omni-channel comes in.

Evolving customer shopping journeys

Retailers have sold successfully to shoppers through a range of different channels, such as high street stores and an e-commerce site, for a number of years – though not necessarily presenting a fully unified experience across both channels for the consumer.

As supporting technology has developed, shoppers have become more confident in using alternate means of engaging with retailers – often several in combination as part of an overall purchase journey. The growth of mobile device use in accessing the web has been a really key part of this.

Today, a typical journey may run as follows: a user finds out about a particular product or range from a social media feed or marketing email, and does some preliminary research through a PC or tablet; this person then visits a store to touch and feel an item and uses their smartphone to access additional information or compare prices; they then order an item through any of the aforementioned channels at a later date to click and collect at a different store.

This may sound fairly familiar in terms of a shopping journey, but since the different channels have often evolved separately from each other, the systems that underpin operations have also largely developed in isolation.

This is probably the biggest challenge preventing the move toward omni-channel – when data is not shared between departments with clear strategies for how to utilise it, understanding how to attribute sales within the business remains very complex and customers get inconsistent experiences across channels.

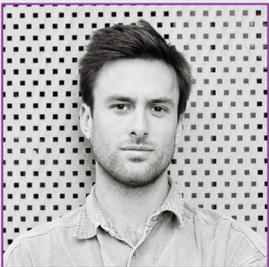
Consistency in service across channels is important

So why does omni-channel matter? In order to answer this question, it is useful to illustrate just a few examples of how customers would expect their engagement to work seamlessly across different channels – and how it can quickly lead to bad experiences when it doesn't.

- A customer is sent a voucher via email, but when they try to redeem it in-store the staff do not recognise the campaign – even though it is from the same retailer as far as they are concerned
- A customer pops into a store to purchase an item that's not in stock – the staff are unable to check whether a nearby store has it, as warehouse data is not shared centrally, even though that customer would probably expect to be able to find out that information via the retailer's mobile site accessed through their own device
- A retailer replies to customer queries via email within an hour, but takes two days to reply to queries via social media – as far as that customer is concerned, immediacy of response is a primary benefit of social media channels and there should not be such disparity between the response rates

As can be seen from these examples, what may be difficult for a retailer to run efficiently and effectively does not matter in the eyes of the customer. They have high and ever-growing expectations of consistency in service and experience across all brand touch-points, irrespective of channel or context of engagement – which all serve to drive the need for seamless omni-channel operations for retailers large and small.

Which, of course, is why omni-channel matters so much.



Will Seymour
Senior Editorial Analyst,
Future Foundation

Greater connectivity with effortless control

As a young person in Britain today, you can expect to earn 10% less than you would have done five years ago, and that's if you've managed to find a job. But you feel the pressure to succeed, your generation sets up a start-up on a shoestring and v-logs all about the journey. When you're not investing in your future, you compare prices religiously and make big decisions by scouring product reviews and forums.

However, as a citizen of Connected Nation, you can take solace in the digital world. You don't need an LA lifestyle to become an internet celebrity. If you only have time to do one thing this week, you can tweet all about it and broadcast a perfect vision of yourself. Yes, it's easy to forget how much wealth the digital revolution has given us, in lieu of economic prosperity. Thanks to group messaging such as WhatsApp, we now start planning social events earlier and finish planning them later. We walk out the door without really knowing where we are going, confident that Google Maps will nudge us in the right direction. Soon we'll even be speaking to our tech as well, indeed, half of US teens already use voice search every day.

But what connects these two narratives? What links the Britain of stagnating wages and discount retailers with the Britain of near-ubiquitous internet access and hyper-connectivity? Well, it's control. At Future Foundation, we have identified the desire for control as the key force operating on today's consumer and as we continue to accelerate into the digital age, our capacity to control our connected lives becomes ever more acute.

Let me unpack Control. Some three quarters agree that they find out everything they can when they plan a trip abroad. A fifth of us regularly check our work emails in bed (then 40% agree that they are under time pressure in their everyday lives). 40%, again, feel the need to have more control over their stress levels. The need to be always-on, in communiqué, a click-away from the perfect decisions is potent and sold to us from all quarters. Those of us who use banking apps (40%), travel apps (19%), or health tracking apps (10%) have instant access to information that we use to optimise our lives for personal fulfilment and social capital. No-one brags about splurging anymore, a reduced salmon from Lidl is the new magnum of Moët. CES 2015 demonstrated a range of tech that will soon connect your car to your home to your baby. Our sphere of personal control gets ever greater.

But what does this do to our mindset? 50% agree that they are concerned about who can access their personal information when they download an app. Nearly half receive too many notifications and as many check their phone more often than they'd like to. Control is stressful. Hyper-connectivity is demanding. Appearing measured is restricting. Two thirds – in all age groups – now agree that the stresses of modern life mean people are simply less happy than they used to be.

**“Control is stressful.
Hyper-connectivity is
demanding. Appearing
measured is restricting.”**

Will Seymour
Senior Editorial Analyst,
Future Foundation

Which is why – as we look to the future – Control is becoming Cruise Control. The ability to manage your health, finances, contacts, and so on, easily and effortlessly. Smart agents operating on your behalf turn the paradox of choice into the promise of the best choice, with over half interested in a service that automatically moves your savings into the best account.

Future tech, and future connectivity, must play to the desire for Cruise Control. Looking to the next generation of devices, around a third of Brits are interested in wearable tech (a proportion that's rising rapidly). But what's most interesting is how wearable tech plays to the desire for Control. In our research, we've found that each thing you feel the need to control (finances, health, weight, social media profile, etc.) makes you 5% more likely to be interested in wearables.

Greater connectivity affords greater control: but the challenge is clear. Control over life that is effortless, stressless, that doesn't interrupt your life in the long term, this is the only kind of control that Connected Britain needs.

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Will Seymour

Senior Editorial Analyst,
Future Foundation



Patricia Hind,
Director,
Centre for Research in
Executive Education,
Ashridge Business School.

Creating a culture for hyper-connected employees

It is widely acknowledged that the business context in today's connected world is characterised by a change of pace, and a more chaotic environment. However, it is not only the speed of operations that matter, the actual nature of organisations themselves has changed.

To succeed today, organisations must be more aware than ever of interdependencies and networks, outsourced functions and collaboration with external stakeholders. It is this complex, externally focussed system that creates competitive differentiation. Think of airline partnerships where companies who compete against each other offer joint loyalty programmes to maximise their commercial opportunities and broaden their customer base. Rarely can businesses today focus simply on their bottom line, they must be keenly aware of the value they are giving and receiving right down through their supply chain.

A group of people who are absolutely central to propelling business forward in a Connected Nation are our employees. Who might these employees be, who survive and prosper in this hyper-connected world? Those who are successful do so because they bring a fluid and proactive mindset to their careers. No longer linear, reactive or predictable, these careers are characterised by change and energy. The term 'generation flux' describes individuals who are continually learning, and often adopt a mantra of 'At least one lesson a day', developing and hoarding new and varied skills on a daily basis. They are 'new' technology savvy, not reliant on legacy media, so they always have up to date information.

As well as keen awareness of the environment around them, these people have a strong sense of personal mission, and a sense of self, which they confidently prioritise. The reason for their success is their heightened ability to operate in complexity. They are excited by change and are not only able to respond to the present, but to take that complexity to create unexpected futures. The challenge for organisations in recruiting and retaining such people is that they expect more recognition of their individual needs, more involvement in driving processes and results, more participation, more information and more transparency. Gen flux wants to learn how to achieve their own, unique goals, and organisational loyalty can only be earned if those individual needs are met as well as those of the business.

Small businesses and start-ups can do this far more easily. They are often driven by personal relationships and it is individual motivations that are usually at the heart of a new organisation. However, larger businesses struggle with systems and procedures that interfere with personal connectivity. Those that do this well are those that invest in fit-for-purpose performance management systems tailored for people who are used to personalised, immediate and relevant information. These systems will incorporate collaborative mechanisms to share performance feedback anywhere, any time; real-time updates of goals and development, and eventually include online social networks with sub-communities of organisational stakeholders with vested interests in creating shared value.

"A group of people who are absolutely central to propelling business forward in a Connected Nation are our employees."

Patricia Hind,
Director,
Centre for Research in
Executive Education,
Ashridge Business School.

It is not only the management processes in a business that need to change in order to attract these high-value and hyper-connected individuals. They expect to lead, and to be led differently.

Coaching and mentoring as styles of leadership and management are buzz words at business schools all around the world in the twenty first century. Good leadership used to be thought to exist in the character of the leader. Contemporary thinking holds that it resides only in the quality of the relationship between the leader and the led. Received wisdom now believes that great leadership listens and responds to the aspirations and concerns of employees. It understands that true engagement cannot be 'pushed' down the line, but has to be 'pulled' together with the individuals involved. This does not make leadership skills any less important in the steering of a company to success – only that those skills must be different and tailored to the demands of gen flux if the value that they can create is to be harnessed.

Leaders who do this well create a culture that allows ambiguity, is excited by change and allows mistakes. Most importantly of all they create a culture in which learning is an everyday occurrence, where organisational agility provides dynamic competitive advantage keeping both gen flux individuals, and investors happy.

“Received wisdom now believes that great leadership listens and responds to the aspirations and concerns of employees.”

Patricia Hind,
Director,
Centre for Research in
Executive Education,
Ashridge Business School.



Dave Langhorn
Head of Sales Enterprise,
Vodafone UK

Investing to win in a connected world

As this report has shown, connected digital devices are embedded in the lives of the majority of the UK's population. More and more, they play a central role in our social relationships and in how we connect to the world around us. Unsurprisingly, this greater personal connectivity has changed our expectations and behaviour regarding companies and brands – both as consumers and as employees.

At Vodafone, we benefit from a distinctive position of being both a 'connectivity' company, and one of the country's largest retailers. We empower consumers, and businesses, to be more connected. With a retail estate reaching over 500 stores on the high street we are all too familiar with the need to deliver a seamless customer experience regardless of how they want to interact with us. And, we've made developing a flexible, connected, workforce a key pillar of our own culture and organisational behaviour. I believe that provides us with a unique perspective on an increasingly connected and complex world – the benefits of which we can pass on to our customers and partners.

With the economy on the road to recovery, now is the time to invest in order to take advantage of the opportunities thrown up by changes in behaviour of more connected consumers – and to set up for success in the future. Two key areas of potential competitive advantage to develop are the ability to offer excellence in customer engagement and experience, and to become a more agile and efficient organisation by enabling greater connectivity among employees.

Firstly, greater connectivity means greater power to the consumer. Connected consumers expect the same experience no matter how they choose to interact with your brand – be it in-store, online, via mobile, on social networks - or, as is becoming the norm, through a combination of these channels. The digital and physical worlds of retail and customer service are converging – consumers expect you to be "open all hours" and able to respond to their needs at whatever stage of the purchasing process they find themselves, via the device, or channel, of their choice. Critical to the ability to serve customers in this way is the ability to source, analyse and act upon, data and insight – both on their behaviour, and on your own company operations, such as stock tracking via M2M (machine-to-machine) solutions.

We've helped retailers like Mamas&Papas implement omni-channel strategies to better serve their demanding audience of parents and parents-to-be. Cloud based services have facilitated real-time stock information across all UK stores, online and on mobile, to maintain utmost levels of efficiency and responsiveness. Contact centre operations are also being upgraded to integrate social media and email into a unified customer experience in order to provide a higher level of service. The result is a seamless customer experience – becoming a trusted source of support for customers and a business that's able to make the most of every opportunity.

Second, building a flexible and collaborative workforce will be critical to attract and obtain most value from today's connected employees – and, consequently, to thrive in a world of rapid and unpredictable change. Through an approach we call "Better Ways of Working",

based on how we've transformed our own business processes, Vodafone can help organisations understand the potential benefits of greater operational mobility, and lay out the steps to get there. This might include our Total Workforce Mobility solution which enables employees get real-time access to the information they need to do their job from wherever they may be, meaning more time spent in the field. Or, a Total Managed Mobility solution help to build and control a flexible and secure mobility strategy, incorporating the use by employees of multiple connected 'bring your own' devices.

It's difficult to deny that technology is changing the way we do business - everything is getting faster and more competitive, and the expectations of consumers and employees are increased, making both more difficult to attract and retain. With our expertise in connectivity, and vast experience in working alongside businesses of all sizes, Vodafone is ready to be your partner to successfully navigate the challenges and complexities of the changing business environment.



Emma Cerrone,
Co-Founder & Managing Director,
Freeformers

Digital skills are a right for all

More of us, using more devices, are exploiting digital to make meaningful connections with our social networks, to create our own business opportunities and to facilitate our engagement with Government.

In this context, digital skills have become as important as reading and writing.

Why? Well, digital has the potential to be a great leveller – for individuals as well as businesses. It can democratise people’s ability to get involved in society. And, as shown by well publicised examples like Uber or Netflix, it can shorten the value chain and create new business opportunities. However, to take advantage of the possibility to be more competitive economically, and to enhance social cohesion and mobility, a fully functioning digital society requires that its members obtain the requisite digital skills.

Through our unique ‘one for one’ business model, Freeformers is dedicated to ensuring that digital is, as per Tim Berners-Lee’s vision, for everyone and can be a catalyst to achieve a more productive and inclusive society. We provide hands-on training for businesses to take advantage of the opportunities provided by digital technologies. And, for each employee we train, we coach a young person for free – helping them transform the digital experience they’ve grown up with into a marketable skill set.

For us, the key to unlocking the potential of both businesses and individuals is confidence.

Despite our use of various devices on a daily basis, in a business context, many of us perceive digital as ‘not for someone like me’. There’s a lingering perception that it’s complex, intellectual and for ‘techy’ specialists, as well as basic barriers around jargon.

Our mission is to empower people to think digitally, to help them understand the possibilities and to drive digital transformation from within the organisation. We do this by equipping our students with a ‘toolkit’ of 4 key digital skills: developing an understanding of coding and how the Internet is built, of social media channels and trends, of the power of digital advertising and of cyber security – which is embedded in everything digital and a common barrier to consumer adoption. The building blocks not only provide immediately actionable skills, but the training also instils a healthy curiosity about the digital world that inspires people to keep learning – that’s crucial to keep pace with a rapidly changing technology environment.

Even young people who’ve grown up as digital natives, and who are creative and comfortable using multiple social networks, don’t necessarily believe that technology is an area they can consider for a career. Or that their skills might be of interest to a company, or be of use entrepreneurially. As with those coming from the corporate world, we show them the possibilities and give them the confidence to go out and shoot for the stars. Some of them even become our trainers – inspiring CEOs with the possibilities of digital.

“Digital skills have become as important as reading and writing... Despite our use of various devices on a daily basis, in a business context, many of us perceive digital as ‘not for someone like me.’”

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Co-Founder & Managing Director,
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Digital inclusion is critical and, while we've had great success, we're just one organisation among many who are making headway. Fantastic charities, often with the support and investment from businesses and Government departments, like Apps for Good and Code Club are working with schools around the country, teaching thousands of kids how to create a digital response to real-life problems and opportunities. We are also proud to be partnering with the BBC on Make it Digital - a yearlong initiative to inspire a new generation to get creative with coding, programming and digital technology. We also welcome the recent inclusion of coding into the curriculum – but would like to see this go further and embed digital skills across all subjects – from Maths to English to the arts – in a hands-on manner, learning in an immersive way. Government can also do more to provide a roadmap for future improvement – signposting where the vulnerabilities lie, and co-ordinating and connecting businesses and charitable support to address them – ensuring that all groups of society, from north to south, urban to rural and young to old are covered.

While there's a lot to be positive about, as shown by the finding in this report that 16% of households remain unconnected, more needs to be done. Creativity and innovation are key competencies for UK Public Companies and technology is critical to maintaining and strengthening our economy and our position in the world. That's why we invite everyone – individuals, business and government – to join us in ensuring that digital skills are embedded into our creative and entrepreneurial culture now, and for the years to come.

“Freeformers is dedicated to ensuring that digital is, as per Tim Berners-Lee's vision, for everyone and can be a catalyst to achieve a more productive and inclusive society.”

Emma Cerrone,
Co-Founder & Managing Director,
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Final thoughts...

Greater connectivity between consumers and business is an inevitable reality given the reliance we all have on the Internet. And with technologies like the Cloud, Big Data and the Internet of Things, everything will become more synergised and interdependent. As the pace of change continues to increase, consumer and employee expectations will grow. Ultimately, this will breed greater competition in business and new opportunities – whether from the other side of the world or from a new start-up down the road.

Putting customer experience first

Businesses will need to adapt how they operate in order to meet this shift in digital expectations. With an eye on both the 'now', and the future heading towards a fully connected nation, the challenge will be to create a seamless experience across all consumer routes to market and communication channels.

Agility and efficiency in operations, enabled by connected technology, will be a priority in order for businesses to respond quickly to changes in the environment and make the most of opportunities that arise. Businesses will also need to think how as an organisation, they fit within an ecosystem of connected partners, suppliers, and customers.

Building a flexible and collaborative workforce will be critical in order to develop the required operational efficiencies and responsiveness. Consequently, all businesses need to re-think how they organise and equip their workforce to ensure they are enabled to succeed. This is not solely about technology - businesses need to give equal focus to developing the right culture and processes for their employees.

After all, digital has levelled the playing field for business. And with the greater expectations of connected consumers, 'experience' will be a key source of competitive advantage. Developing best-in-class, end-to-end, customer experiences requires brands to place customers at the heart of everything they do. They must look to make the most of data and insight across all aspects of the business to meet the specific needs of customers. Perhaps, and most critically, the focus must be on seamlessly joining up all channels that consumers use to engage. While this may not be an easy journey, the benefits of increased consumer and employee engagement, greater efficiencies and innovation will be worth the time and investment. Wouldn't you agree?

Finally

We hope you've found the research and opinion in this report valuable and thought provoking. With all of the learnings from it in mind, below are 5 'top tips' to help you get ready for this new business environment.

Five tips for creating a connected experience

1

Build seamless customer experience – based on feedback

Today's consumer expects to be able to interact with businesses via the channel of their choice at their moment of need. Whether that's using their smartphone to research products while travelling, on the high street, or chatting to a customer service rep over the weekend. The key to success is placing them at the heart of everything you do. Talk to them, get their feedback. Use social listening tools like Hootsuite or Klout to hear conversations first-hand, and online qualitative research or customer service surveys – to gain a deeper understanding of their behaviour. From here you can develop an engagement strategy that delivers a seamless journey and experience across all channels.

2

Personalising customer interactions with data

The physical and digital worlds are converging as a result of increased penetration of mobile devices and more mainstream use of technologies like beacons or augmented reality. At House of Fraser, for example, mannequins send shoppers alerts about the clothes they're wearing and provide the option of purchasing via mobile. Each interaction is also a source of data which, once analysed, can enable enhanced customer experiences - offering new levels of quality, personalisation, customisation and immediacy. All businesses, big and small, need a strategy for how they capitalise on the new opportunities that this creates.

3

Evolve company culture to enable connected employees

Business leaders need to understand that employees who prosper in a chaotic, fast changing world may have a different profile to those they're used to hiring. They certainly have different expectations. You'll need people who are able to thrive with complexity, are excited by change and are continually developing a varied skill set. In return for their efforts, they expect greater recognition, more transparency and involvement in driving processes and results. Leaders will have to develop deeper relationships with their connected employees, and create a culture that enables ongoing learning, entrepreneurship and offers new challenges to keep people motivated.

4

SMEs need to connect

Two thirds of SMEs don't have a website, and only 1 in 3 sell or market online. Getting connected themselves is an imperative for SMEs to succeed with increasingly connected consumers. There are lots of resources out there to help. The Government has recently announced a £3k broadband voucher scheme. Moreover, charities like the Tinder Foundation and Go ON UK provide help and training.

5

Don't leave the unconnected behind

While the vast majority of consumers are online, almost 10 million people in the UK remain unconnected. This is a significant proportion of the population which brands need to address; requiring a balanced omni-channel strategy. The private sector, working with Government and not-for-profits, can also help them to get connected by providing education about the benefits, delivering digital skills training and helping provide affordable access. Increasing digital inclusion can be a win-win for business – as getting connected can increase a person's purchasing power & employability.

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All statistics and reports referenced by our expert contributors are included in this report in good faith.

Methodology

Methodology

This report is based on an online survey of 720 internet-enabled UK households, complemented by a telephone survey of 160 non-internet-enabled UK households. Respondents to the surveys were representative of the UK adult population by age, working status, annual household income and geographical location. The surveys were conducted by independent specialist B2B research agency Circle Research.

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