Apps: How to realize their full value

Retail Integrated Report (SG, PK, TH)

Contents

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Research overview

Research coverage
3 markets with 33 retailers

- Indonesia - 11 retailers
- Thailand - 13 retailers
- Singapore - 9 retailers

Methodology
Qualitative and Quantitative

Part of a larger consumer research conducted among mobile app users covering Retail, Telco, and Finance verticals.

- Singapore and Thailand - 1000+ interviews each
- Indonesia - 2000+ interviews

Research partners
Kantar and Sixth Factor

KANTAR (Quantitative)

SIXTH FACTOR (Qualitative)

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Definitions used in this report

Marketplace apps	An app where where retailers can come together to sell their products or services to a curated customer base
Branded apps	An app which retailers own and manage, and where they can sell their own products directly to consumers
App Discovery	A point in the consumer app journey, when a user has an awareness of an app or has installed it
App Onboarding	A point in the consumer app journey, when a user has installed an app and used it for the first time. Users are beginning to form affinity with brands
App Engagement	A point in the consumer app journey, when a user has used an app for the first time and continues to use it. Regular app usage links to increased loyalty and brand satisfaction
App Satisfaction	A point in the consumer app journey, when a user has used an app and developed an opinion on their satisfaction using the app. When consumers are highly satisfied with the app they will begin to recommend both the app and brand

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Three elements to enable retailers to realize the full value of apps

01

Why do retailers need to prioritize apps and app marketing?

02

What can retailers do to elevate the quality of their app?

03

How can app marketing help retailers achieve their marketing objectives?

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Apps are a crucial channel for retailers to invest in due to its increasing usage by customers and advantages it offers

The App Landscape

The App Advantage

The app landscape for retailers today

Apps usage has become the norm, with multiple retailers competing for attention, app usage and loyalty.

Apps awareness is high; yet apps remain dormant. Retailers need to move beyond install, and drive app onboarding and re-engagement, in order to grow their business.

The incentive for retailers to improve their apps' quality is high - there is a strong correlation between app satisfaction, as well as brand loyalty and advocacy.

An average customer has **2-3 Marketplace** apps and **2-3 Branded** apps installed.

36% of app users have **unused retail apps** installed.

- Retailers have headroom to improve their apps' satisfaction **- 42% rate an app highly.**

- **99%** of those who **rate an app highly** also reported **high likelihood of remaining a customer of the brand** for the foreseeable future.

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While majority of app users have at least one retail app installed, more than a third of app users have an unused retail app installed

80%
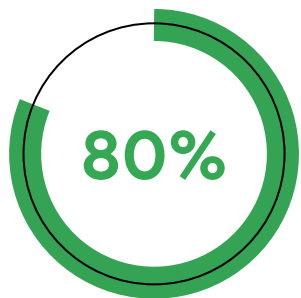
of consumers have at least one retail app* installed [1]
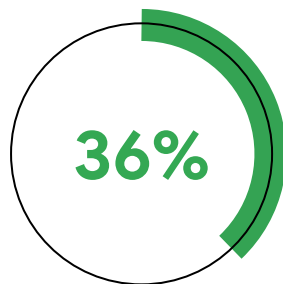
36%

of app users have unused retail apps installed as they prefer another with similar function [1]
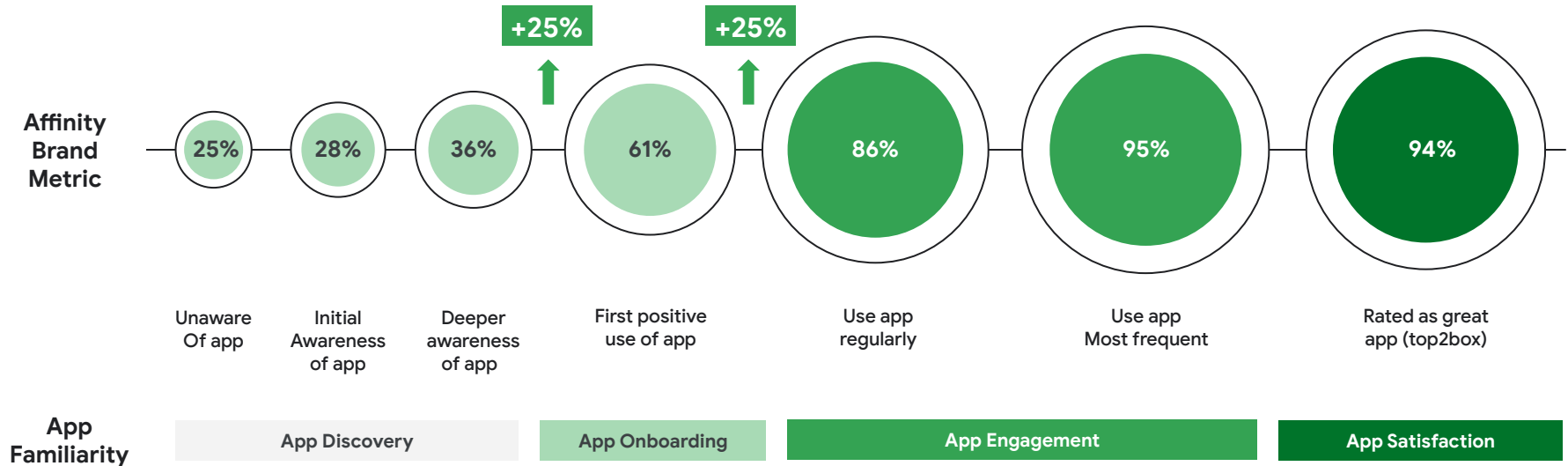
Consumers tend to have a preferred go-to shopping app that monopolises the bulk of their shopping.

Apps with similar offerings are then left unused.

*Among retail apps covered in this research - full list here

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Retailers need to think beyond awareness and install. Focus on onboarding and re-engagement, where the impact on affinity is highest

Affinity Brand Metric

+25%   +25%

25%   28%   36%   61%   86%   95%   94%

Unaware Of app

Initial Awareness of app

Deeper awareness of app

First positive use of app

Use app regularly

Use app Most frequent

Rated as great app (top2box)

App Familiarity

App Discovery

App Onboarding

App Engagement

App Satisfaction

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Improving the quality of an app pays off for retailers - there is a strong correlation between app satisfaction and brand loyalty and advocacy

Impact on Brand Loyalty [1]

99% of those who rate an app highly also scored high on **brand loyalty**

+6% increase in likelihood to remain a customer of the brand in the future if they are highly satisfied with the app than if they feel neutral about the app

+8%   +3%   +5%

Impact on Brand Advocacy [2]

85% of those who rate an app highly are **brand advocates**

+56% increase in likelihood to recommend the brand to family and friends when the user is highly satisfied with the app compared to when they feel neutral about the app

+64%   +54%   +49%

" I love app A because it is convenient, I use it almost everyday. I don't have to go into the store - I can choose, browse, just as if I am at the physical store.

— **Thailand heavy app user**

" I recommend using App B when friends ask me where I bought specific products they want to buy.

— **Indonesia light app user**

Think with Google

Source: Google commissioned Kantar "Apps: How to realize their full value" Research - 2021 Retail
[1] Question: How likely are you to remain a customer of the following brands for the foreseeable future? 5pt scale. Base: Rated app highly, n=2499 responses
[2] Question: How likely would you be to recommend this brand to your family and friends? 11pt scale. Base: Rated app highly, n=2559 responses

Advantages of having an app for retailers

**01** Apps drive **positive and progressive perception of the brand**.

02 Apps are able to deliver a more **immersive experience** than websites, and customers appreciate it when retailers can **mimic in-store shopping via digital touchpoints**.

03 Apps are an **end to end shopping channel** - customers use it to browse, research, and buy.

04 Apps are **convenient, user-friendly**, and **facilitates direct interactions with retailers**. Hence more customers **prefer apps over other channels.**
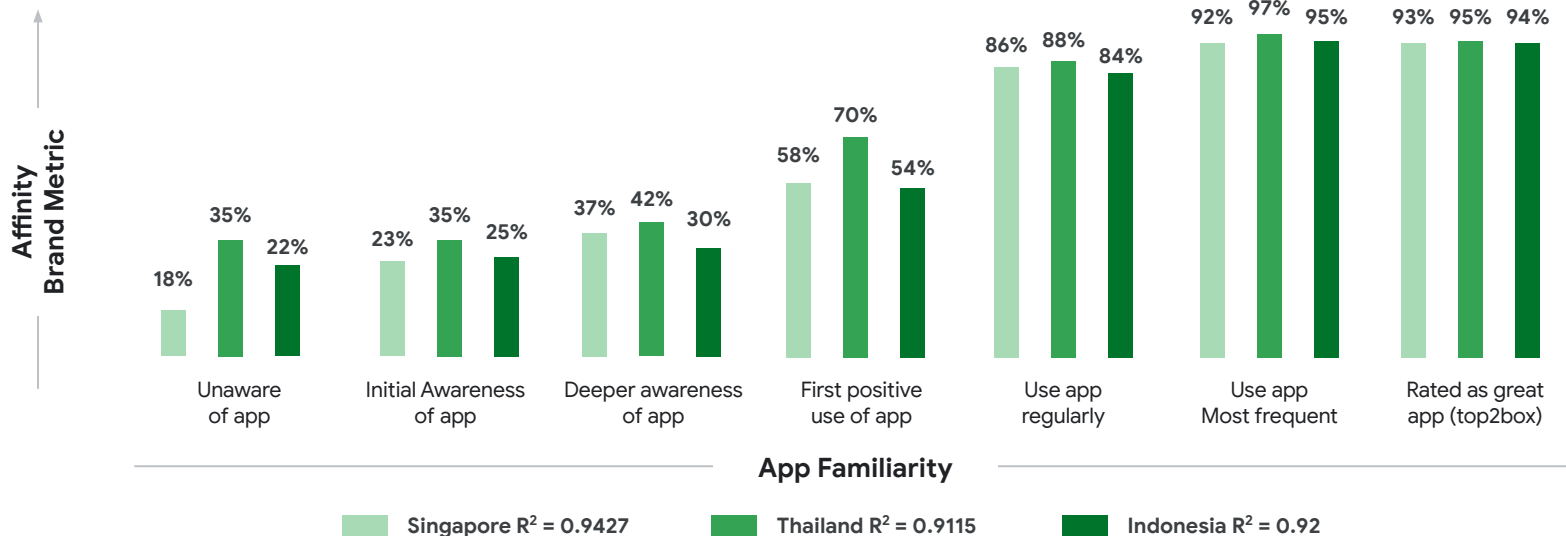
05 Apps help **build trust**, by providing customers a sense of **security and assurance of authenticity**.

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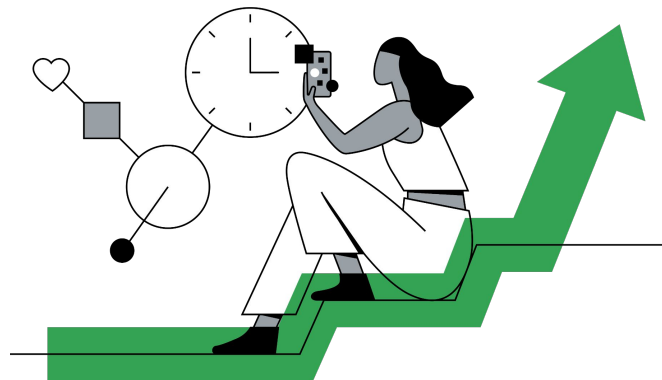
Customers are increasingly expecting a high performing brand to have an app…

SHIFT IN BRAND AFFINITY BETWEEN CONSUMER APP JOURNEY STAGES (top2box*)

Affinity Brand Metric

Unaware of app	Initial Awareness of app	Deeper awareness of app	First positive use of app	Use app regularly	Use app Most frequent	Rated as great app (top2box)
18% 35% 22%	23% 35% 25%	37% 42% 30%	58% 70% 54%	86% 88% 84%	92% 97% 95%	93% 95% 94%

App Familiarity

Singapore R^2 = 0.9427   Thailand R^2 = 0.9115   Indonesia R^2 = 0.92

Think with Google

Source: Google commissioned Kantar "Apps: How to realize their full value" Research - 2021 Retail
Question:. How do you feel about about each of these brands. Drag each onto the scale. N =1252
Top2box refers to the "net" of the top 2 codes on a scale; in this instance selected on a 7pt scale

... as they can engage with a brand through an app, anytime and anywhere

" I think in this time and age, it's important for retail brands to have a shopping app. Everyone is online. They will lose out on customers like us.

– Singapore light app user

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Apps are able to deliver a more immersive experience than websites, and increase engagement with customers through gamification

39% are encouraged to continue app usage when apps are updated regularly with new, useful features [1]

Augmented reality

A close replica to trying products in store, that apps can best deliver compared to other digital channels.

There is more opportunity for branded apps to utilize Augmented Reality than marketplace apps to deliver an enhanced virtual shopping experience.

> " I've come across an apparel app where you can visualise how the clothes looks with your face and body... it'll make me more confident to shop online for clothes.

- Singapore heavy app user

Gamification

Enables retailers to go beyond the transactional nature of selling products and improve engagement.

Marketplace apps have more gamification elements compared to branded apps. Branded apps have a huge opportunity to use gamification to increase engagement.

> " I still use the shopping app to play games even if I don't buy things as I can collect coins, which can be used as a discount to buy various things at a lower price.

- Thailand heavy app user

Think with Google

Customers use retail apps for multiple purposes, beyond purchasing goods and services

	Thailand		Singapore		Indonesia	
Average no. of activities	6		5		8	
Browse (Upper funnel)	Look for discounts Look at exclusive offers Browse products	82% 47% 44%	Look for discounts Browse products	76% 49%	Look for discounts Browse products Look at exclusive offers Save wanted items	83% 65% 37% 23%
Research (Middle funnel)	Product comparison Read reviews	46% 57%	Read reviews Product comparison	42% 38%	Product comparison Read reviews Look at product photos	65% 65% 55%
Buy (Lower funnel)	Check or redeem rewards	48%	Check or redeem rewards	56%	Buy products	45%

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Even if customers do not convert on the app, they often browse and conduct research, which impacts the customer's final purchase decision

" I use shopping apps almost everyday – I will keep checking it daily, browsing it, waiting for sales, or finding what I like.
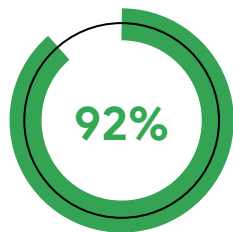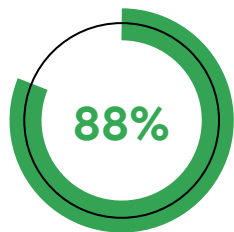
– Thailand Heavy app user

Think with Google
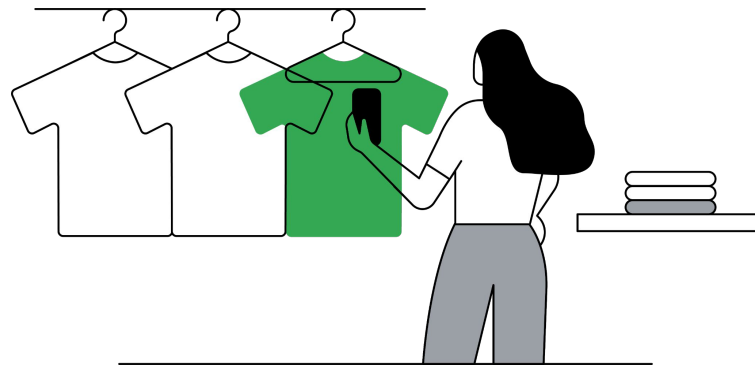
Apps are convenient not only because it can be used at anytime but also because customers can access a wider inventory...
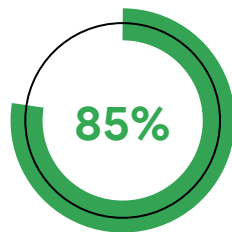
[1]**App users agree:**

92%

"I can use apps from anywhere and at anytime."

88%

"I like having the ability to access brands / products I can't in-store."

85%

"Apps are more convenient than going in-store / in-branch."

❝ I prefer using apps because I get to view the products at my own time, I don't have to walk the whole store to see, and I can even look at it on the train.
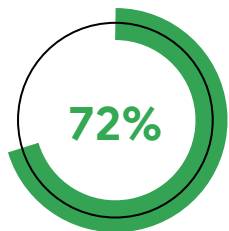
- Singapore heavy app user

❝ When shopping on apps, you can easily find options. It's not like having to go from shop to shop at the mall.

- Indonesia light app user

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... hence more customers prefer apps over other channels

72% of app users prefer to engage with brands through apps compared to other channels* [1]

🇮🇩 **84%**　🇹🇭 **71%**　🇸🇬 **62%**

Main reasons for preference [2]

59% I find it **quicker**

57% I find it **easier**

59% Can do it from **anywhere**

46% **User friendly**

- **Compared to shopping in stores**, shopping on apps **saves time** on commuting and makes it **easier to discover products** from different retailers

- **Compared to websites**, apps can be more **user-friendly, engaging and secure**

- Other key app benefits include **wider product choices** and **cheaper prices**

*Other channels include websites, employee in person, employee on the phone, and email

Source: Google commissioned Kantar "Apps: How to realize their full value" Research - 2021 Retail
[1] Question: Which would be your preferred way to engage with retail/e-commerce brands? Base: Total sample, n=1252
[2] Question: You said you would prefer to engage with retail/e-commerce brands via apps. Why is this? Base: Prefer to engage via an app, n=935

Think with Google

Apps provide customers with a sense of security and assurance of authenticity, hence are seen as a trustworthy digital shopping channel
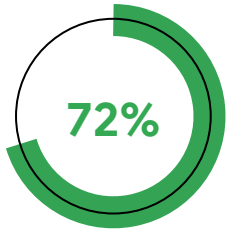
72% of app users agree they trust apps to keep their details safe [1]

One of the top reasons for continued usage of an app is '**Apps are proven secure and safe**' [2]

50%   62%   45%

- For branded apps, **customers feel assured shopping via apps** as they are considered 'official' channels. Hence products are more likely to be **authentic** and there is a **lower risk of fraud**.

- For marketplace apps, features such as **holding payments** until products are received or **hassle free returns process** can help mitigate security or fraud concerns.

" Sometimes, I am unsure if a website is an official or phishing website. Using an app can be more credible because it is harder to 'fake' an app.

- Thailand heavy app user

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With an acceleration in apps usage, it's an increasingly competitive landscape and retailers need to deliver a high quality app to customers
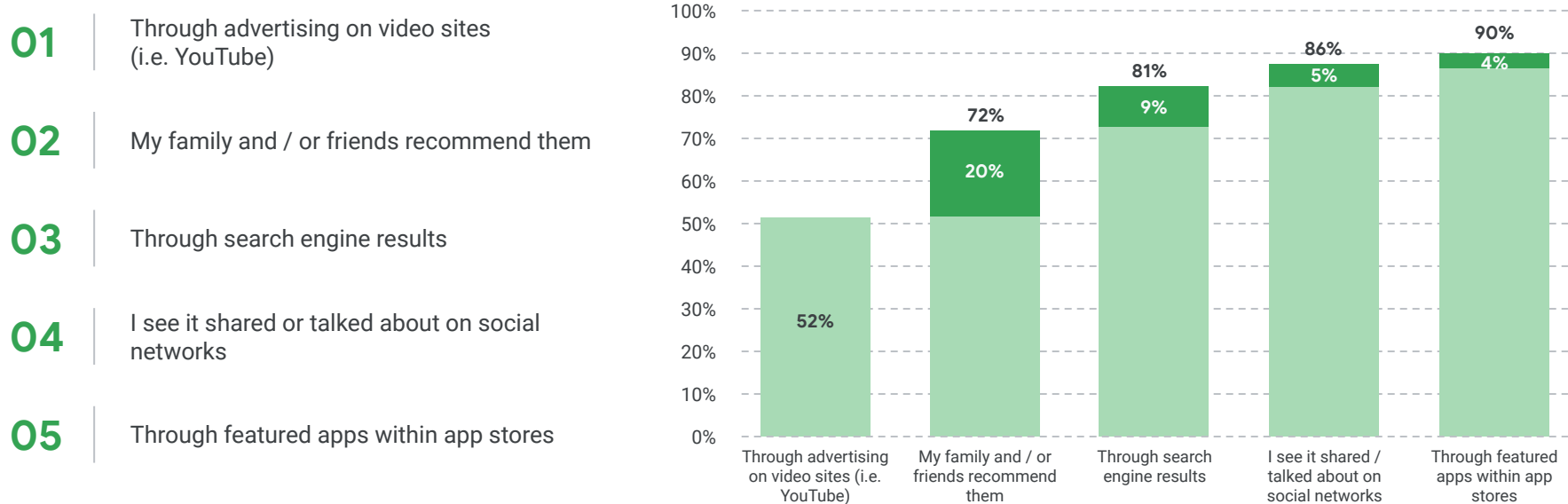
Importance of getting the basics right

What encourages customers to go back to an app

What would entice customers to use apps more?

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To maximise installation, retailers need to meet customers where they are present and most likely to be influenced

Here are the top five touchpoints that deliver 90% reach*

01 Through advertising on video sites (i.e. YouTube)

02 My family and / or friends recommend them

03 Through search engine results

04 I see it shared or talked about on social networks

05 Through featured apps within app stores

Chart showing cumulative reach percentages:
- Through advertising on video sites (i.e. YouTube): 52%
- My family and / or friends recommend them: 72% (20% increment)
- Through search engine results: 81% (9% increment)
- I see it shared / talked about on social networks: 86% (5% increment)
- Through featured apps within app stores: 90% (4% increment)

Source: Google commissioned Kantar "Apps: How to realize their full value" Research - 2021 Retail
Question: How do you typically find out about new retail/e-commerce apps? Base: Total sample, n=1252

Think with Google

To reinforce continued usage and avoid deletion or dormancy on apps, retailers need to meet the basic expectations of an app

Top reasons for users to continue using an app [1]

52% App is proven to be **safe and secure**

62%   45%   50%

39% **Updated regularly** with new and useful features

43%   37%   37%

39% **Less memory** taken up on smartphone

50%   37%   31%

33% Updated regularly to **fix bugs**

42%   31%   27%

> **"** I use eCommerce apps like App A as I feel more secure when the payment is released after I confirm that the product has arrived.
>
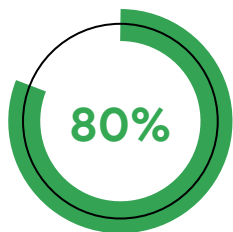> - **Indonesia heavy app user**

> **"** For App B, I don't use the app because the app is not stable and the pictures are very pixelated. So it is difficult to buy via the app.
>
> - **Thailand light app user**

Note for TH: Social media was #2 reason at 38%, which is unique for the market

Source: Google commissioned Kantar "Apps: How to realize their full value" Research - 2021 Retail
[1] Question: What encourages you to continue to use retail/e-commerce apps rather than delete/ uninstall them? Base: Total sample, n=1252

Think with Google

App users regularly search for discounts

80%

of app users look for discounts on retail apps regularly [1]

76%   82%   83%

- Apps users are on the lookout for events like flash sales, sales festivals and discount codes
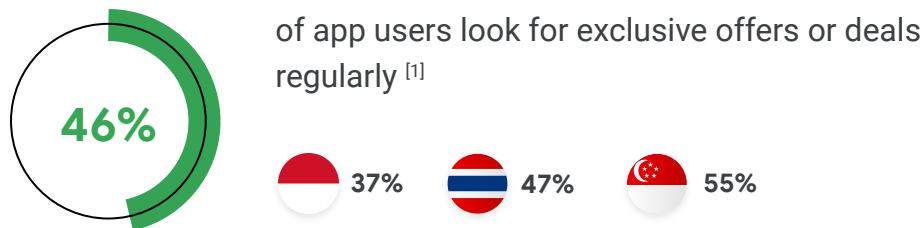
- App-exclusive deals encourages higher app usage

" In a week, I browse the app about 3 times as there are a lot of food and beverage deals everyday.

- Thailand light app user

And they are also drawn to value-based deals, which is a huge opportunity for branded apps

46%

of app users look for exclusive offers or deals regularly [1]

🇮🇩 **37%**   🇹🇭 **47%**   🇸🇬 **55%**

When it comes to offers and deals, customers are also looking for value added services such as customer service, extended warranty, etc., beyond just cost benefits

" I like getting an app-exclusive notification on App A when they are running out of items, which I may not know when you walk into their stores.

- Singapore light app user

Think with Google

Reviews are not only a key touchpoint to trigger install, but also encourage users to continue engaging with an app

55%

of app users read reviews on retail apps regularly [1]

42%   57%   65%

" I like to read a lot of reviews. If a product has a lot of sales but the rating is below 3, I have to read reviews to see what is wrong before I consider purchasing.

- Indonesia heavy app user

" I follow trends for new makeup and skincare products. Then I read real user reviews on a marketplace app.

- Thailand light app user

- However, app users are far more likely to read reviews than write a review hence retailers will likely need to either:
  - Aggregate or import reviews from other platforms
  - Or, continue incentivising review contributions

- There is a big opportunity for branded apps to increase the number of reviews on their apps and for marketplace apps to continue expanding their efforts around reviews

Think with Google

Source: Google commissioned Kantar "Apps: How to realize their full value" Research - 2021 Retail
[1] Question: How frequently do you perform the following activities within your retail/e-commerce apps? Base: Total sample, n=1252

App users use retail apps regularly to look a specific product - this is also a top reason for new users to install

53%

of app users use retail apps regularly to browse availability of products [1]

49%   44%   65%
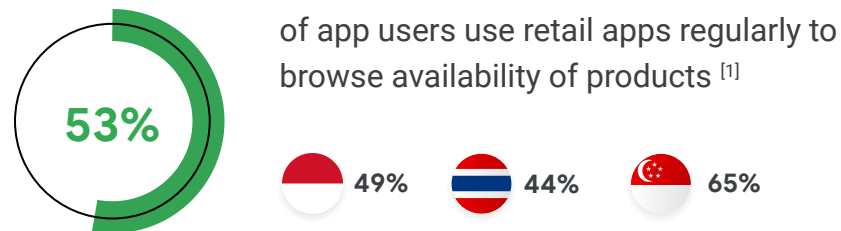
"Sometimes I don't intentionally want to buy something, I like to browse and scroll, then add to my cart or wishlist.

- Indonesia light app user

"I want the app to remind me when my regular purchases are running low e.g. if I run out of milk, or toilet paper.

- Thailand light app user

- Customers want to see recommended items based on their favourites and preferences, as well as receive reminders and notifications based on purchase history

- Branded apps tend to have a wider variety of product offerings compared to marketplace apps, i.e. limited edition, off-season clearance etc, which drives installation and usage if the product search is brand-specific

Think with Google

While loyalty programs are effective in maintaining regular usage of retail apps, they are not effective when the rewards are low or complex

49% of app users surveyed use retail apps regularly to access loyalty schemes [1]

56%   48%   42%
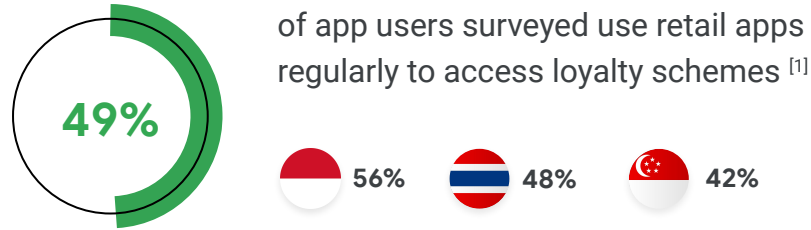
" I prefer App A because I can see how many points I have on the homepage and what I can redeem with the points - 1000 points = 30 baht

- Thailand light app user

" I am more inclined to use an app that provided some form of rewards like cashback, bonuses, etc.

- Singapore Heavy app user

- If retailers use rewards or loyalty programs to build stronger engagement and loyalty in the long run, they need to commit to a program that is simple, yet provides sufficient rewards to motivate customers to earn the rewards

- For example, retailers can make the reward points visible and prompt users to redeem by offering redemption suggestions

Think with Google

Particularly for marketplace apps which have more products, helpful navigation and favourites management can improve the app quality

Simplified and helpful navigation

Show menus and recommended items based on customers' preferences and remove less relevant items.

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66 Sometimes there's a huge range of products. When you search for a dress, and they prompt you with similar products, that's useful.

- Singapore light app user

Favourites management

Apps are not only used for purchases - customers also want to save their favourite items for future purchase

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66 Sometimes it is hard to find the same items, so it will be good if apps have a feature to 'favourite' an item, and if app users can categorize the favourites by theme.

- Thailand light app user

Think with Google

Lastly, customers are looking for an app that moves away from being transactional, to one that is helpful, immersive and multifunctional

Helpful	Available and reliable **customer service**	"On app A - I can chat with the seller, but on app B - they don't have customer care services that allows me to talk to someone directly for any questions." **Thailand light app user**
	Provides **assurance** around **authenticity and product delivery**	"Real-time photos and reality may not be the same. Normally I will chat with the seller and ask them to share recent photos of the product so that I know what the product will look like." **Indonesia light app user**
Immersive	Experiential **shopping**	"App C has an Augmented Reality feature which allows me to view the shoes on my feet better, so I'm more likely to buy from them." **Singapore heavy app user**
	Ability to **search via images**	"I want to search for products using photos or screenshots so that I can easily find products" **Indonesia heavy app user**
Multi-functional	A **one-stop shop** app with a wide range of functionality	The top two features that would encourage app users in this research to use an app more is if the app is a one stop shop for all their needs and provides a wide range of functionality.

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So how can retailers use app marketing to realize the full value of apps?

3

How can app marketing help retailers achieve their marketing objectives?

Over index on frequently used and influential discovery touchpoints to trigger installs

Make your products more easy to discover to maximize the likelihood of conversion

Reach out to high potential customers to re-engage with your app so that you can improve retention

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Even with high awareness of retail apps, this doesn't guarantee installs or onboarding. Video advertising is a critical touchpoint to trigger installs

3

How can app marketing help retailers achieve their marketing objectives?

Insights

Retailers should focus on **promoting their app through critical discovery points** which are regularly used and influential, such as video advertising

	Online	Offline
🔴	**Ads on video sites** Reviews online	Family / friends
🔵	Social networks **Ads on video sites**	Family / friends

Implication for brands

Acquire new users with the right creative assets in your app Install Campaigns, especially videos.

- Ensure all Ads Groups have maximum asset coverage for Text, **Video**, and Image formats
  - Video assets can help maximize your app campaign's reach and conversions, leveraging inventory sources such as YouTube
  - Apps that add a video to their campaign see a median 20% increase in installs without a significant increase in CPI*

- Find an App Preferred Creative Partner to help you create video assets if you need support in video production.

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Use app advertising solutions to be present in key moments of intent and make it easier for customers to find your products

3

How can app marketing help retailers achieve their marketing objectives?

Insights

One of the top 5 reasons for customers to install an app is to **look for specific product** [1]

48%   **41%**   **33%**

> " I started shopping via apps when I found a pair of shoes I was looking for in an app, but couldn't find in a mall. Sometimes there are local shoes from Bandung that are not available in stores (in Jakarta).

**- ID, Light app user, 24-39 years old**

Implication for brands

Maximize discovery and conversions by highlighting relevant products to new and existing customers

- Use **feeds for ACi or ACe** to make your product information and app more discoverable

- Implement **App Deep Linking** to direct customers from your Google ads to the relevant pages on their apps
  - On average, deep linked ad experiences drive 2X the conversion rates.
  - Shopee saw a 126% increase in checkouts

- Validate your deep links using the new **App Deep Linking Validation tool**. <u>Here's</u> how it works

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Once you get users to try your app, use re-engagement campaigns to encourage users to stay engaged and take meaningful actions
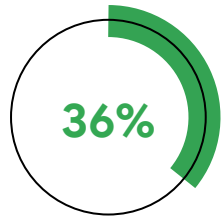
3

How can app marketing help retailers achieve their marketing objectives?

Insights

36% of app users have **unused retail apps installed** as they prefer another with similar function [1]

" In the past, I kept comparing App A and B - but always find App A cheaper. Now I just go straight to App A.

- Thailand heavy app user

Implication for brands

Drive loyalty of existing users and measure lifetime value

- Target specific users with specific app actions to come back with **audience targeting for ACe**
  - Club Factory saw upto a 10X lift in purchase value with the right audience strategies

- Use **feeds for ACe** to highlight products that your customers are already interested in and additional relevant suggestions to bring them back

- Measure the lifetime value (LTV) of your app users with **Google Analytics for Firebase** to inform marketing strategies for retaining and growing loyal user base

Think with **Google**

Country-specific Insights
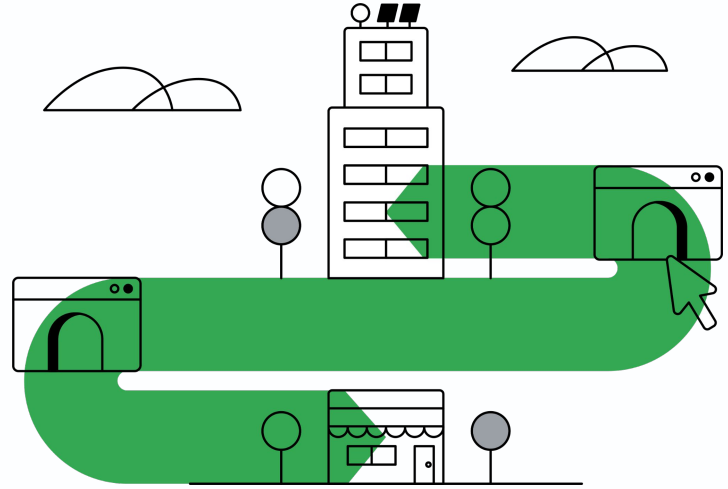
Overview of the markets

High usage of retail apps, with strong social dynamic

Dominated by marketplace apps, with under-optimized customer experience

Apps play a complementary role in retail journey

Wide usage of apps in the purchase journey, with customers using a variety of retail apps.

Tends to be highly social - customers like to share their retail experiences and purchases.

With a relatively larger group of new users to app shopping (compared to other markets), branded retail apps have room for improvement in their app functionality and customer experience before they become as widely used as marketplace apps.

Customers are more driven by instant gratification from discounts and deals, rather than working towards accumulation of points for rewards redemption.

Despite relatively advanced app offerings (compared to other markets), the preference to make a purchase at brick and mortar stores is still high.

However, when we look at online purchases only, apps are the preferred channel. Apps also serve as a research tool that is an important touchpoint in the online and offline retail journey.

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Thailand

Retail is a hugely saturated market meaning many apps remain dormant on phones. Retailers need to differentiate their apps to gain a market share and one route to explore could be through social media.

# Many apps remain dormant on phones due to the saturated retail market

Retailers need to clearly articulate the benefits of their offerings and/or differentiate their offering in a saturated market so that customers follow through to onboarding and continued usage of an app

7 retail apps installed on average [1]

44% have at least one retail app that is installed but not used [1]
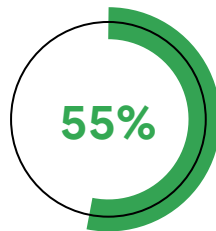
55% haven't trialled installed apps as they currently have a preference for another option. [2]

In such a saturated market, apps really need to be differentiated and unique in order to change current app habits.

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Thai app users are highly social and want to share their shopping experiences

Social networks are crucial in Thailand and can come in useful to increase app engagement

38% Feel encouraged to use a retail app more if it is endorsed by a social media influencer [1]

34% Feel encourage to use a retail app more if they see it used / talked about on social media [1]

" I want to share about the experience with my friends so they can see what I like. Because I like the item, and I also want my friends to buy it.

- Thailand light app user

Thailand customers display more emotional triggers for continued usage compared to Singapore and Indonesia - they are particularly swayed by social media and their favourite influencers. If retailers and apps can partner with popular and relevant endorsers, this could create strong levels of loyalty.

Thai customers are keen to socialize their shopping experience so there is opportunity to encourage more authentic reviews by easily socializing them, i.e. allow customers to easily share their reviews on the shopping app onto their social media accounts and vice versa.

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Indonesia

Engagement with retail apps is high with a strong preference seen - and they could be improved further by more enticing rewards programs and loyalty schemes.

Apps are important more than ever as many come online for the first time

Indonesian users regularly perform multiple activities on apps and the average app usage is higher than TH and SG

Preference for apps is currently very high. However, there are a number of new app users as a result of being severely hit by the pandemic. These customers need help with potentially their first app experiences to ensure this preference continues.

To increase app onboarding and engagement, retailers need to provide guidance around how to use apps (i.e. tutorials, troubleshooting) to reduce frustrations around the changes that a shift to digital brings.

74% average app usage in past 3 months vs. 66% SEA average [1]

8 activities are regularly performed in retail apps, on average [2]

84% of app users prefer to engage with retail brand via an app vs. 72% SEA average [3]

71% would prefer to buy online across key categories, Of these - 86% would choose apps over websites [4]

Source: Google commissioned Kantar "Apps: How to realize their full value" Research - 2021 Retail
[1] Question: How familiar are you with each of these retail/e-commerce apps? Base: Total sample, n=601
[2] Question: How frequently do you perform the following activities within your retail/e-commerce apps? Base: Total sample, n=601
[3] Question: Which would be your preferred way to engage with retail/e-commerce brands? Base: Total sample, n=601
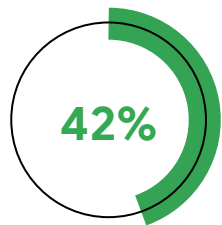[4] Question: Thinking of the products you've recently bought, which method would you prefer to use when buying these products? Base: Total sample, n=601

More enticing rewards programs could increase app satisfaction

Loyalty rewards program was one of the key drivers for app satisfaction in Thailand and Singapore, but interestingly, was not in Indonesia

42% Check or redeem rewards / loyalty schemes regularly within apps [1]

> " Sometimes you have to collect a lot to redeem something. You know what, just relax and not pursue it. Focus on instant rewards. Points expire when you forget about them.

- Indonesia light app user

In Indonesia, customers find it takes a longer time to accumulate the points to be able to redeem something, hence they prefer direct discounts which provide instant gratification.

To drive greater app satisfaction through a loyalty program, brands would benefit from providing some rewards that are easy to redeem in the short run.

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Singapore

Retailers need to show the relevance, convenience and advantages to using apps compared to other retail options. A differentiated positioning and offering by the app is needed to complement other retail options. Apps shouldn't just focus on being a destination for discounts and deals.

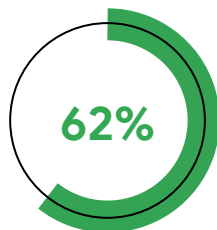# Retail apps are underused in Singapore compared to Thailand and Indonesia

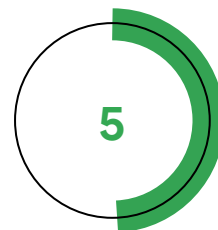**Retailers need to focus on building up activity repertoires in apps - they shouldn't just focus on being a destination for discounts and deals**

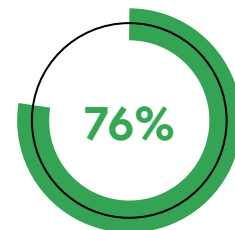**3**

retail apps installed
on average [1]

62%
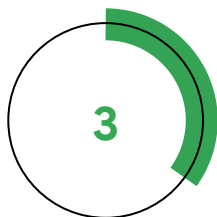
prefer to engage with
brands through apps [2]

5

activities are regularly
performed in retail
apps, on average [3]

76%

regularly look for
discounts or promotions [3]
Most popular activity

Lowest in the region

Source: Google commissioned Kantar "Apps: How to realize their full value" Research - 2021 Retail
[1] Question: How familiar are you with each of these retail/e-commerce apps? Base: Total sample, n=350
[2] Question: Which would be your preferred way to engage with retail/e-commerce brands? Base: Total sample, n=350
[3] Question: How frequently do you perform the following activities within your retail/e-commerce apps? Base: Total sample, n=350

Ensure the apps can be differentiated yet also a one-stop-shop

A differentiated positioning and offering by the app is needed to complement other retail options

Purchase preference across key categories [1]

45% Prefer to buy in-store

27% Prefer to buy through app

17% Prefer to buy via desktop website

11% Prefer to buy via mobile website
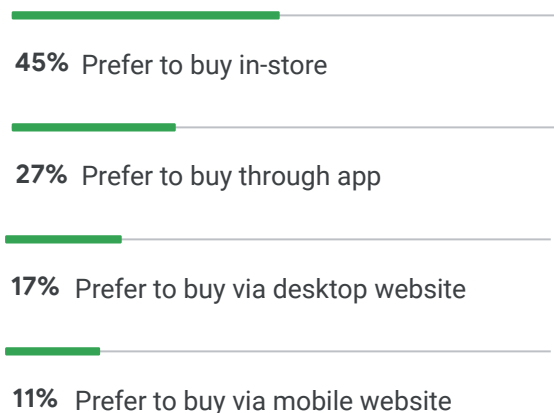
Compared to Thailand and Indonesia, Singaporean customers do not try to do everything within the app but use a combination of offline, websites and app in their overall shopping journey.

Apps are the most preferred method to purchase out of the other options to purchase online (desktop and mobile website).

Apps could try to improve key functionality and make it easier for customers to find products (either through app advertising solutions or UX) throughout the path to purchase to encourage more online conversion.

Source: Google commissioned Kantar "Apps: How to realize their full value" Research - 2021 Retail
[1] Question: Thinking of the products you've recently bought, which channel would you prefer to use when buying these products? Base: Total sample, n=350

Appendix

List of brands and apps surveyed in this research

	Indonesia	Thailand	Singapore
Specialty/ Branded Apps	Alfa Gift Alfa Cart Klik Indomaret Transmart Home Delivery Hypermart Online Happy Fresh	Tops Big C Tesco Makroclick 7-Eleven JD Central Watsons TH Home Pro IKEA	Sephora Adidas Courts Hipvan Ikea Uniqlo Decathlon Fairprice Castlery
Marketplace Apps	Lazada BliBli BukaLapak Tokopedia Shopee	Lazada Shopee Aliexpress Shopat24	

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Thank you