Apps: How to realize their full value

Telco, Singapore
Background & Methodology
Research overview

Objectives

Understand how apps can help improve business brand, growth, and revenue, particularly in light of changing behaviour as a result of COVID-19, by exploring the different and developing customer engagements on apps.

Methodology

Part of a larger consumer research conducted among mobile app users covering Retail, Telco, and Finance verticals. n=1001 for Singapore Quantitative, with n=300 for Telco subset and 2 playgroups (n=4, each) per vertical for Qualitative research. Research covered 7 brands and their respective apps*.

Quantitative

- Frequent internet user
- 18-64 years old smartphone user
- Interacts with vertical via app

Qualitative

- Mixture of male and female app users
- Light retail users: Use telco apps 1-3x a month & conducts 5 different app activities
- Heavy retail users: Use telco apps at least once a week & conducts 5 different app activities

Using screen-out data, the incidence of retail app usage is approximately 68%

* Singtel (Singtel / Singtel Dash / Singtel Cast), StarHub (StarHub / Starhub Giga / Starhub TV+), GOMO, M1, MyRepublic, Giga, CirclesLife, HungryGowhere, HOOQ
# Who are generally using telco apps?

## Profiling

<table>
<thead>
<tr>
<th>Gender</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Male</td>
<td>52%</td>
</tr>
<tr>
<td>Female</td>
<td>48%</td>
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</table>

<table>
<thead>
<tr>
<th>Age</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34 (52%)</td>
<td>32%</td>
</tr>
<tr>
<td>35-64 (68%)</td>
<td>68%</td>
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</table>

<table>
<thead>
<tr>
<th>Internet Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily 96%</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Operating System</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>iOS</td>
<td>33%</td>
</tr>
<tr>
<td>Android</td>
<td>67%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Income</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Below $3,999</td>
<td>19%</td>
</tr>
<tr>
<td>$4,000 - $5,999</td>
<td>14%</td>
</tr>
<tr>
<td>$6,000 - $8,999</td>
<td>23%</td>
</tr>
<tr>
<td>$9,000 - $11,999</td>
<td>21%</td>
</tr>
<tr>
<td>$12,999 or more</td>
<td>21%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Connection Devices</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone</td>
<td>100%</td>
</tr>
<tr>
<td>Tablet</td>
<td>48%</td>
</tr>
<tr>
<td>Laptop Computer</td>
<td>84%</td>
</tr>
<tr>
<td>Desktop Computer</td>
<td>33%</td>
</tr>
<tr>
<td>Smart Speaker</td>
<td>18%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Smartphone Storage</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 16GB</td>
<td>2%</td>
</tr>
<tr>
<td>16GB</td>
<td>4%</td>
</tr>
<tr>
<td>32GB</td>
<td>13%</td>
</tr>
<tr>
<td>64GB</td>
<td>24%</td>
</tr>
<tr>
<td>128GB</td>
<td>37%</td>
</tr>
<tr>
<td>Over 128GB</td>
<td>18%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Prepaid v/s Postpaid</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Top up online</td>
<td>12%</td>
</tr>
<tr>
<td>Top up in-store</td>
<td>2%</td>
</tr>
<tr>
<td>Contract/Fixed bills</td>
<td>86%</td>
</tr>
</tbody>
</table>

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*Think with Google*
What insights did we want to uncover?

01 What constitutes an ‘effective’ telco app for app users?

02 How do app users perceive businesses who have an ‘effective’ app?

03 What is the link between an ‘effective’ app and business outcomes?

04 How are individual brands performing?

05 Deep dive into consumer app behaviour: types of app activities, frequency of usage and reasons for install, deletion and usage

06 What are pre-paid payment habits? What is the sentiment towards USSD? What type of content do they enjoy on telco apps?
Summary of Findings
Introducing our 3 behavioral pillars that drive value for a brand in a consumer's app journey

**App Discovery and Onboarding**
Has the app been trialled following awareness and install?

**Key for App Discovery and Onboarding**
Consumers are beginning to form **affinity** with brands, which are aiming to create positive links to discovery metrics before engagement deepens.

**App Engagement**
How frequently is the app used?

**Key for App Engagement**
Consumers are using the app more frequently. Regular app usage links to increased **loyalty** and brand **satisfaction**.

**App Satisfaction**
How satisfied is the app user with the app?

**Key for App Satisfaction**
When consumers are highly satisfied with the app they will begin to **recommend** both the app and brand - which will help bring in more consumers to start their own **discovery** journey.
Introducing our 3 behavioral pillars that drive value for a brand in a consumer's app journey

Stages of App Discovery and Onboarding, App Engagement, App Satisfaction

**App Discovery and Onboarding**

- **Initial Awareness:** shift between “Never heard of app” and “Heard a little”
- **Deeper Awareness:** shift between “Heard a little” and “Heard a lot”
- **Installation:** shift between “Heard a lot” and “Installed but not used”
- **Onboarding:** shift between “Installed, not used” and “Tried app, still installed”

**App Engagement**

- **Regular Usage:** shift between “Tried app, still installed” and “Use regularly”
- **Most Frequent:** shift between “Use regularly” and “Use app most often”

**App Satisfaction**

- **Neutral:** shift between “Dissatisfied (1-6)” and “Neutral (7-8)"
- **Positive:** shift between “Neutral (7-8)” and “Satisfied (9-10)”

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Think with Google
App Discovery and Onboarding: Key insights and recommendations

**Insights**

- **80-100%** of telco brand’s customers are **aware of telco apps** in Singapore

- On average, **51% of recent brand users** (past 3 months) are not using respective apps

- App discovery is a starting link to **building brand affinity**
  - 46% of successful onboarders have strong affinity
  - 17% of successful onboarders “love” the brand

- **42%** of App users have **installed at least one telco app but never used**

- **79%** will visit in-store for telco services **less than several times a year** - a strong shift of people avoid in-person interaction post Covid

**Recommendations to improve brand metrics**

- **Focus less on awareness of the app**
  High awareness so time is better spent on driving install or trial

- **Encourage installation through regularly used and influential touchpoints**
  E.g. Promote advertising through video sites (i.e. YouTube).

- **Encourage installation by promoting influential yet underutilized touchpoints**
  E.g. advertising through search, app stores, and offline

- **Focus more on improving trial**
  **Key reasons** why app users do not try apps after install are:
  - they are already using a different app (38%), haven't had the time (33%), find the app design/UX complicated to use (27%), or don't understand what the app provides me (19%)
  - Some find it challenging to sign-up to use an app; 36% find there are too many steps involved in sign up processes
App Engagement: Key insights and recommendations

Insights

● App engagement has a positive correlation with customer retention; brand satisfaction bounces upwards
  ○ 28% of ‘most frequent’ users are highly satisfied with the brand (increasing to 60% among the top 3 box)
  ○ 84% of ‘most frequent’ users are “quite or very likely” to stay with the brand

● 56% of app users prefer to engage via apps. Apps are preferred for their security, ease of use, and access

● Activity repertoire in apps is limited; users focus on data usage (63% perform regularly) and bill tracking (60%), but secondary functions are underutilised

● App users are encouraged to continue usage when apps are proven to be secure (34%), have been updated regularly (33%), and take up minimal room on smartphones (31%)

Recommendations to improve brand metrics

● Upkeep core features that bring app users back
  E.g. viewing bills (63% perform regularly) and tracking data (60%). Telco apps are becoming increasingly popular for redeeming rewards (43%) and discounts (43%)

● Maximize opportunity areas around entertainment
  Is there appetite for entertainment through telco apps? Currently usage of music (11% perform regularly), video (7%), and gaming (7%) in telco apps is low. Other markets see higher usage and these activities elicit high satisfaction

● Raise awareness of underutilized yet helpful features
  Underutilized features like customer service engagement (15% perform regularly), or tech troubleshooting (8%) may feel too stressful via apps; brands need to demonstrate how seamless support is in-app, amplifying this by being regular in updates and bug fixes to promote continued usage
App Satisfaction: Key insights and recommendations

**Insights**

- App satisfaction is **strongly correlated with brand recommendation** - 72% of whom rate an app as “perfect” regard themselves as brand promoters.

- 70% of app users would **prefer a multi-functional singular app** compared to multiple single purpose apps.

- As well as providing a channel that is safe during Covid such as an app, brands can meet **changing consumer needs** providing convenience - 24% strongly agree they enjoy having access anywhere or anytime, and 18% strongly agree apps are more convenient than going in-store.

**Recommendations to improve app metrics**

- **Get the basics right, consistently**
  Ensure **critical tasks** (e.g. data tracking) are reliable and seamless. **Bugs** and poor interfaces quickly put users off.

- **Understand changing consumer needs**
  Primary reasons for using Telco apps include staying safe at home during Covid (19%) & preferring digital over cash (16%).

- **Innovate to meet consumer needs**
  Data tracking, while a simple task, could be **more in depth for some** (built-in charts), and come with different offerings like roll-over data or free-roaming. Tech-savvy consumers are looking for alternative payment methods like crypto or e-wallets.

- **Prepare for new opportunities**
  Despite **low usage**, entertainment in telco apps is an opportunity to sustain regular usage - if brands want to create content that appeals to telco app users, the **opportunity lies in movies** (as less supply vs. demand).
A successful app journey correlates with positive brand affinity (with strong shifts seen at onboarding and regular use).

Summary of Findings

- **App Familiarity**
  - App Discovery and Onboarding
  - App Engagement
  - App Satisfaction

- **Affinity Brand Metric**
  - Unaware Of app: 31%
  - Initial Awareness of app: 26%
  - Deeper awareness of app: 30%
  - Successful app onboarding: 46%
  - Use app regularly: 70%
  - Use app Most frequent: 76%
  - Rated as great app (top2box): 86%

- **R² = 0.8997**
Positive uplifts are reflective with other significant brand metrics, correlating with along the app journey.
App Discovery and Onboarding

How does onboarding of an app impact brand metrics?
Positive app discovery and onboarding builds brand affinity

App Discovery and Onboarding

Unaware Of app: 31%
Initial Awareness of app: 26%
Deeper awareness of app: 30%
Successful app onboarding: 46%
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Rated as great app (top2box): 86%

R² = 0.8997

Think with Google
Telcos with an app are seen to be more progressive

Apps have become a standard offering from a Telco, and a telco without an app would seem outdated. When consumers begin a new relationship with a telco, the app is viewed as part of the package.

“I can’t remember how I discovered the app, maybe pre-installed... I think the telco is outdated if they don’t have any app.

- Light app users
Advertising on video sites is crucial to app installation and complemented by offline word of mouth.

**Crucial Touchpoints**
- Advertising on video sites (e.g., Youtube)
- Family / friends recommend them

**Niche Touchpoints**
- Advertising on Search Engines
- Staff Recommend them

**Secondary Touchpoints**
- Through Brand Websites
- Through News Articles
- I see it shared / talked about on websites

**Less Influential**
- Searching within app stores
- Featured apps within app stores
- Reading Reviews Online

**Very Influential**
- Advertising on websites
- Reading Reviews Online

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Source: CJ5. How do you typically find out about new apps? CJ6. How influential are these in persuading you to install a new app? Total Sample = 300

"I downloaded App A after a colleague shared with me that it can be used to make payments and get free data."

- Heavy app user
Brands can look to capitalize on the influence advertising brings both online (search/websites) and offline.

**Opportunity / Invest Touchpoints**

Touchpoints that not frequently used yet are influential in installation decision making

<table>
<thead>
<tr>
<th>Online</th>
<th>Offline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advertising on search engines</td>
<td>Offline advertising</td>
</tr>
<tr>
<td>Advertising on websites</td>
<td>Staff recommend them</td>
</tr>
</tbody>
</table>

**Typical touchpoints used**

- **Very Influential**
  - Staff recommend them
  - Featured apps within app stores
  - Through News Articles
  - I see it shared / talked about on websites
  - Searching within app stores
  - Advertising on Search Engines

- **Less Influential**
  - Search Engine Results
  - Through Brand Websites
  - Reading Reviews Online

Source: CJ5. How do you typically find out about new apps? CJ6. How influential are these in persuading you to install a new app?

I've had the app ever since it came out. The telco branch staff at Singtel told me about it, and said that it's good for tracking my bills.

- Light app users
Apps need to live up to expectations to encourage trial; convenient features and Covid safety are top of mind

### Installation Triggers (Top 10)

<table>
<thead>
<tr>
<th>Trigger</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I needed help tracking my data</td>
<td>44%</td>
</tr>
<tr>
<td>They are from my current telco</td>
<td>42%</td>
</tr>
<tr>
<td>It had features that looked useful</td>
<td>25%</td>
</tr>
<tr>
<td>It is a safer option during Covid-19</td>
<td>21%</td>
</tr>
<tr>
<td>I wanted to be able to top-up my account easily</td>
<td>19%</td>
</tr>
<tr>
<td>I wanted to subscribe to services / manage subscriptions</td>
<td>17%</td>
</tr>
<tr>
<td>I wanted to change the way I make payments due to Covid</td>
<td>16%</td>
</tr>
<tr>
<td>They offer personalised offers and incentives</td>
<td>16%</td>
</tr>
<tr>
<td>Everyone uses this app / I was recommended to use it</td>
<td>15%</td>
</tr>
<tr>
<td>The app was highly rated on an app store</td>
<td>14%</td>
</tr>
</tbody>
</table>

Many habits and behaviours of Telco users were disrupted when Covid arrived, and so it was necessary for many to adjust their current Telco habits accordingly.

- Telco apps provide a digital safety against Covid
- Telco apps have many discounts/promotions on that help support those financially struggling

All in one apps help make telco management convenient - users are looking for features that are useful, easy to understand and use, and can enable telco app users to apply for additional services (especially with Covid disrupting individual plans)

Word of mouth, both online and offline, has strong pulling power. The impact of Covid meant many new users being pushed online, but given how easy it is to communicate opinions via app stores or in-person, it isn't difficult for new users to align themselves with brands that fit their needs and values.

Source: CJ3. Thinking specifically about "PIPE DUMMY CODE FROM S6a" apps, why do you decide to download and try these apps? CJ4. Thinking of the reasons you chose previously, please rank in terms of importance when it comes to your decision whether to download a "PIPE DUMMY CODE FROM S6a" app. Total Sample = 300
Looking forward, it is likely that in-store telco interactions will be even less frequent.

Waiting time at the store is crazy, queue number is inaccurate. Now that I am a [Telco A] prestige customer, I have priority queue privileges. However, after Covid, I’m scared of crowds I so seldom go out.

- Heavy app user

People don’t want to go to the store, or call and wait. App is the way to go. My friend was so happy with his experience to get his phone through the app.

- Heavy app user

Frequency Of Visiting Telco Store Due To Covid

Past  | Current  | Future
---|---|---
3% | 8% | 2%
11% | 9%  | 11%
13% | 12% | 32%
32% | 23%  | 47%
35% | 35% | 9%
6% | 12% | 32%


Total Sample = 300
Users are unlikely to switch immediately from their current app, and need time to learn how to use a different app

<table>
<thead>
<tr>
<th>Reasons to install but not use</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I use a different app instead</td>
<td>38%</td>
</tr>
<tr>
<td>I haven't had the time</td>
<td>33%</td>
</tr>
<tr>
<td>I don't understand what the app provides me</td>
<td>19%</td>
</tr>
<tr>
<td>The app design or user experience is complicated</td>
<td>17%</td>
</tr>
<tr>
<td>I need someone to help me / teach me more</td>
<td>13%</td>
</tr>
<tr>
<td>The sign up process looks complex</td>
<td>10%</td>
</tr>
<tr>
<td>It is too risky to sign up to new products during Covid</td>
<td>6%</td>
</tr>
</tbody>
</table>

Convenience and benefits drive trial

Given that Singaporean consumers are highly tech-savvy, they want to have the convenience of managing their telco services at their fingertips. They are also enticed by benefits offered by the telco supplementary apps which provide discounts.

"I like App A because I can earn points... the app is on my iPhone so can just tap and pay, no need to bring wallet out. App A is my default payment."

- Heavy app users

Source: CU3. How familiar are you with each of these <PIPE DUMMY CODE FROM S6a> apps? Drag each into the appropriate box below.

CU3a. Why have you installed telco apps but not used them?
Total Sample = 300, Have installed apps but not used = 126
Telco apps have potential to build customer retention, but some feel overwhelmed by the processes for new services.

### Likelihood Of Signing Up To Services Using A Telco App

<table>
<thead>
<tr>
<th>Service</th>
<th>Likelihood</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recontract with a new device</td>
<td>58%</td>
</tr>
<tr>
<td>Upgrade to better data plan</td>
<td>50%</td>
</tr>
<tr>
<td>Sign up for a broadband package</td>
<td>49%</td>
</tr>
<tr>
<td>Sign up for a roaming plan</td>
<td>42%</td>
</tr>
<tr>
<td>Sign up for a tv package</td>
<td>35%</td>
</tr>
</tbody>
</table>

I downloaded [Telco A] app because I need to use it to apply for and register a new line/number, it needed to be done through the app. - Light app users

### Challenges Signing Up For New Products/Services Using Telco App

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Likelihood</th>
</tr>
</thead>
<tbody>
<tr>
<td>There are too many steps involved in the sign up process</td>
<td>36%</td>
</tr>
<tr>
<td>All offers and services are not available in my telco and mobile app</td>
<td>31%</td>
</tr>
<tr>
<td>I don’t sign up to new products/services through my telco and mobile app</td>
<td>24%</td>
</tr>
<tr>
<td>The app redirects to a website</td>
<td>23%</td>
</tr>
<tr>
<td>I prefer using websites to sign up</td>
<td>23%</td>
</tr>
<tr>
<td>Login requirement</td>
<td>19%</td>
</tr>
</tbody>
</table>

ST1. If you could transact and sign up for services using your telco & mobile app, how likely would you be to... [T2B - Quite or very likely too]

ST2. What are the current challenges you face using your telco & mobile app when signing up for new products/services?

Total Sample = 300
App Discovery and Onboarding: Key insights and recommendations

Insights

- **80-100%** of telco brand’s customers are aware of telco apps in Singapore
- On average, **51% of recent brand users** (past 3 months) are not using respective apps
- App discovery is a starting link to building brand affinity
  - 46% of successful onboarders have strong affinity
  - 17% of successful onboarders “love” the brand
- **42%** of App users have installed at least one telco app but never used
- **79%** will visit in-store for telco services less than several times a year - a strong shift of people avoid in-person interaction post Covid

Recommendations to improve brand metrics

- **Focus less on awareness of the app**
  High awareness so time is better spent on driving install or trial
- **Encourage installation through regularly used and influential touchpoints**
  E.g. Promote advertising through video sites (i.e. YouTube).
- **Encourage installation by promoting influential yet underutilized touchpoints**
  E.g. advertising through search, app stores, and offline
- **Focus more on improving trial**
  Key reasons why app users do not try apps after install are:
  - they are already using a different app (38%),
  - haven’t had the time (33%),
  - find the app design/UX complicated to use (27%),
  - or don’t understand what the app provides me (19%)

Some find it challenging to sign-up to use an app; 36% find there are too many steps involved in sign up processes
App Engagement

How frequently is the app used?
Increased app engagement strongly links to brand affinity

- **App Engagement**: 86%
- **App Satisfaction**: R² = 0.8997

Affinity Brand Metric:
- 31%: Unaware Of app
- 26%: Initial Awareness of app
- 30%: Deeper awareness of app
- 46%: Successful app onboarding
- 70%: Use app regularly
- 76%: Use app Most frequent
- 86%: Rated as great app (top2box)

App Familiarity:
- **App Discovery and Onboarding**
- **App Engagement**
- **App Satisfaction**
Positive uplifts are reflective with other significant brand metrics, correlating with along the app journey

App Discovery and Onboarding

- Unaware of app: 9%
- Initial Awareness of app: 7%
- Deeper awareness of app: 10%
- Successful App Onboarding: 13%
- App Familiarity: 11%

App Engagement

- Use app regularly: 30%
- Use app Most frequent: 28%
- Rated as great app (top2box): 28%
- App Familiarity: 33%

App Satisfaction

- Satisfied: 72%
- Retention: 84%
- Brand Promoter: 97%
- App Familiarity: 66%

Satisfied $R^2 = 0.708$  Retention $R^2 = 0.8237$  Brand Promoter $R^2 = 0.7654$
Telco apps offer specific, consistent uses for basic needs

2 telco apps installed on average

4.2 activities are regularly performed in telco apps, on average

1.8 activities are performed weekly, on average

Source: CU11. What activities do you regularly perform when you use (PIPE DUMMY CODE FROM S6a) apps? Total Sample = 300
Telco app users prefer engagement with brands, given how convenient, quick, and easy access is to telco apps.

56% prefer to engage with brands through apps.

"In the past, everything was simpler and I didn’t expect much. Everything was troublesome. But now it’s so convenient with the app, you don’t need to go to the branch anymore."

- Light app users

### Total Sample = 300; Prefer to engage via App n = 168

- 16% Via an employee on the phone
- 12% Via an employee in person
- 9% Via their website
- 7% Via email

Source: CU10. Which would be your preferred way to engage with <PIPE DUMMY CODE FROM S6a> brands?
CU10a. You said you would prefer to engage with <PIPE DUMMY CODE FROM S6a> brands via apps. Why is this?

Think with Google
Telco app users prefer engagement with brands, given how convenient, quick, and easy access is to telco apps.

<table>
<thead>
<tr>
<th>Reason for engaging with brands through an app</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is quicker</td>
<td>61%</td>
</tr>
<tr>
<td>I can do it from anywhere</td>
<td>53%</td>
</tr>
<tr>
<td>I find it easier</td>
<td>53%</td>
</tr>
<tr>
<td>I can access it anytime of the day or night</td>
<td>50%</td>
</tr>
<tr>
<td>They are very user friendly</td>
<td>36%</td>
</tr>
<tr>
<td>I can deal with all my accounts in one place</td>
<td>34%</td>
</tr>
<tr>
<td>It is the method I have always used</td>
<td>27%</td>
</tr>
<tr>
<td>It has all the features I need</td>
<td>27%</td>
</tr>
<tr>
<td>They have all my details stored</td>
<td>24%</td>
</tr>
<tr>
<td>It is safer in the current climate (i.e. covid 19)</td>
<td>23%</td>
</tr>
<tr>
<td>I prefer not having in person interaction</td>
<td>17%</td>
</tr>
<tr>
<td>I prefer the security processes (i.e 2 Factor authentication )</td>
<td>11%</td>
</tr>
<tr>
<td>The app provides special features that other channels don't</td>
<td>9%</td>
</tr>
<tr>
<td>I prefer the limited features</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: CU10. Which would be your preferred way to engage with <PIPE DUMMY CODE FROM S6a> brands? CU10a. You said you would prefer to engage with <PIPE DUMMY CODE FROM S6a> brands via apps. Why is this?
Total Sample = 300; Prefer to engage via App n = 168
There is a clear preference for using apps across all telco activities - app users are ‘sold’ on what apps can do

Activity Preference (%)

<table>
<thead>
<tr>
<th>Activity</th>
<th>App</th>
<th>Mobile Website</th>
<th>Desktop Website</th>
<th>Store / Branch</th>
<th>Call centre</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Track data usage</td>
<td>87</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View my bills</td>
<td>83</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check or redeem rewards / Loyalty schemes</td>
<td>76</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Make bill payments (postpaid)</td>
<td>72</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check for network outages</td>
<td>71</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manage mobile data plan</td>
<td>71</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add to/top-up my mobile data plan (prepaid)</td>
<td>69</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Look for discounts / promotions</td>
<td>66</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>For music entertainment</td>
<td>59</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>For games</td>
<td>59</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change what payment method I use</td>
<td>59</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Track Orders</td>
<td>59</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subscribe to/manage add-on services</td>
<td>59</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Engage with customer service (i.e text chat/chatbots)</td>
<td>57</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>For video entertainment</td>
<td>56</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>For opportunity of additional income (agents)</td>
<td>52</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Troubleshoot tech issues</td>
<td>50</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apply for new services and products</td>
<td>48</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change what payment method I use</td>
<td>45</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: CU14. Please tell us your preference for which method you would prefer to perform each activity shown below?

Total Sample = 300
Keeping on-top of data and bills are main behaviours for telco app users

### Common Telco App Behaviours

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>View my Bills</td>
<td>63%</td>
</tr>
<tr>
<td>Track data usage</td>
<td>60%</td>
</tr>
<tr>
<td>Check or redeem rewards / loyalty schemes</td>
<td>43%</td>
</tr>
<tr>
<td>Look for discounts / promotions</td>
<td>43%</td>
</tr>
<tr>
<td>Make bill payments (postpaid)</td>
<td>29%</td>
</tr>
<tr>
<td>Manage mobile data plan</td>
<td>24%</td>
</tr>
<tr>
<td>Subscribe to / Manage Add-on services</td>
<td>24%</td>
</tr>
<tr>
<td>Change what payment method I use</td>
<td>23%</td>
</tr>
<tr>
<td>Apply for new services and products</td>
<td>19%</td>
</tr>
<tr>
<td>Engage with customer service</td>
<td>15%</td>
</tr>
<tr>
<td>Add to/top-up my mobile</td>
<td>14%</td>
</tr>
<tr>
<td>Check for network outages</td>
<td>14%</td>
</tr>
<tr>
<td>Track orders</td>
<td>14%</td>
</tr>
<tr>
<td>For Music Entertainment</td>
<td>11%</td>
</tr>
<tr>
<td>Troubleshoot tech issues</td>
<td>8%</td>
</tr>
<tr>
<td>For Games</td>
<td>7%</td>
</tr>
<tr>
<td>For video entertainment</td>
<td>7%</td>
</tr>
<tr>
<td>For opportunity of additional income</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: CU11. What activities do you regularly perform when you use «PIPE DUMMY CODE FROM S6a» apps? Total Sample = 300
Keeping on-top of data and bills are main behaviours for telco app users

"I check my telco usage everyday because I can receive up to 100 pictures a day from work, so I need to monitor my data usage closely."

- Heavy app user

"I don’t check until they prompt me. There is an alert when I have hit 95% of my data. Once that pops up, I will check regularly to see if I exceeded the data."

- Light app user

Source: CU11. What activities do you regularly perform when you use «PIPE DUMMY CODE FROM S6a» apps?
Total Sample = 300
App users are often looking to check rewards or look for promotions - a popular but secondary functions with users.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>View my Bills</td>
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</tr>
<tr>
<td>Manage mobile data plan</td>
<td>24%</td>
</tr>
<tr>
<td>Subscribe to / Manage Add-on services</td>
<td>24%</td>
</tr>
<tr>
<td>Change what payment method I use</td>
<td>23%</td>
</tr>
<tr>
<td>Apply for new services and products</td>
<td>19%</td>
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<tr>
<td>Engage with customer service</td>
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</tr>
<tr>
<td>Add to/top-up my mobile</td>
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<tr>
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<td>14%</td>
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<tr>
<td>Track orders</td>
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</tr>
<tr>
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<tr>
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</tr>
<tr>
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<td>7%</td>
</tr>
<tr>
<td>For opportunity of additional income</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: CU11. What activities do you regularly perform when you use a<PIPE DUMMY CODE FROM S6a> app? Total Sample = 300
Limited-time deals and rewards incentivize login

Telcos offer attractive rewards that need to be redeemed quickly. This motivates some users to log in frequently so that they can earn and redeem rewards and check for time-limited offers, hence keeping the telco at top of mind.

“I go to the app to see the offers and play games to get rewards almost every day. I didn’t use to do it but my friends also do it everyday and I saw my friend had won a PS4.”

- Heavy app user

“My default mode is to turn off all notifications for apps. But I want to know promotions from the telco. There was 1-for-1 movies ticket at Cathay, attractive for me but i didn’t know because i didn’t click into the SMS.”

- Light app user
Looking for new content or services isn’t top of mind for telco app users; but potential for brands to build upon

### Common Telco App Behaviours

- **View my Bills**: 63%
- **Track data usage**: 60%
- **Check or redeem rewards / loyalty schemes**: 43%
- **Look for discounts / promotions**: 43%
- **Make bill payments (postpaid)**: 29%
- **Manage mobile data plan**: 24%
- **Subscribe to / Manage Add-on services**: 24%
- **Change what payment method I use**: 23%
- **Apply for new services and products**: 19%
- **Engage with customer service**: 15%
- **Add to/top-up my mobile**: 14%
- **Check for network outages**: 14%
- **Track orders**: 14%
- **For Music Entertainment**: 11%
- **Troubleshoot tech issues**: 8%
- **For Games**: 7%
- **For video entertainment**: 7%
- **For opportunity of additional income**: 3%

Source: CU11. What activities do you regularly perform when you use «PIPE DUMMY CODE FROM S6a> apps? Total Sample = 300
An app can aid in streamlining customer service

The app can become the **central touchpoint for customer services**, so that users do not have to deal with the hassle of searching for other services on the website or following up via email/hotline.

“Why is it that I can talk to humans on the web but can only talk to AI on the app? AI can be troublesome if it does not quickly understand what we are looking for.”

- **Light app user**

“I detest contacting customer service. If I have to contact them, means I have an issue, so I have to force myself to contact them. It's stressful already.”

- **Light app user**

“Online chat with the help desk is ideal. But some providers want to replace human labour with AI, so if they want to do it, need to make it better. So that they take one minute to reply, instead of putting me on hold on the phone.”

- **Light app users**
App users look for useful information, security, and well optimised apps that perform to phone specifications

**Continued Usage (Top 10)**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have to use the app as it is with my provider</td>
<td>40%</td>
</tr>
<tr>
<td>If it proved it was secure and safe</td>
<td>34%</td>
</tr>
<tr>
<td>If the app was updated regularly with new, useful features</td>
<td>33%</td>
</tr>
<tr>
<td>It it takes up less memory on my smartphone</td>
<td>31%</td>
</tr>
<tr>
<td>If it sends useful notifications</td>
<td>31%</td>
</tr>
<tr>
<td>If the app was updated regularly to fix bugs</td>
<td>28%</td>
</tr>
<tr>
<td>If it uses less mobile data</td>
<td>26%</td>
</tr>
<tr>
<td>When the app notifies me of any changes</td>
<td>21%</td>
</tr>
<tr>
<td>If my friends or family are using / talking about it more</td>
<td>17%</td>
</tr>
<tr>
<td>If it shows its relevance during COVID-19</td>
<td>15%</td>
</tr>
</tbody>
</table>

Telco app users aren’t likely to be flexible in the apps they can use, seeing as it needs to be tied with a specific provider. But this doesn’t mean users aren’t wary of the fact the app needs to be secure both digitally and relevant during Covid (or otherwise risk thinking about switching)

The key word here is useful - as continued usage is not overly dependent on “less notifications” but those that do come up need to be relevant and targeted to specific users

Regular updates are crucial to continued app usage whether it new features, or fixing issues. App developers and telco brands can not stand still, particularly in a time when so many are moving to digital. Apps need to better optimise to varying phone limitations, as users won’t be able to stick with the brand if their own device hinders from optimal performance

Source: CJ7. What encourages you to continue to use <PIPE DUMMY CODE FROM S6a> apps rather than delete/uninstall them? Total Sample = 300
Consumers expect apps to cover all functionality...

**Full control via the app**

After years of familiarity, Singaporean consumers would prefer to completely bypass customer service agents and take control of their own telco management directly via the app.

Even functions they rarely use should be intuitive to search for, learn, and troubleshoot on their own.

“About claiming rewards on the app and such, I don’t like waiting on the line to get assistance on anything and prefer to go through the app.”

- Heavy app user

**Comprehensive suite of services for every need**

The app should hence offer comprehensive and powerful functions to cover every need, including:

- Track/analyse telco usage
- Check bill payment history
- Apply for recontract
- Pre-order or purchase new phone
- Subscribe to additional services
- Check/redeem rewards

“People don’t want to go to the store, and don’t want to call and wait. App is the way to go. My friend was so happy with his experience to get his phone through the app.”

- Heavy app user
... and are frustrated when they have to contact the hotline

Other touchpoints only if the app fails to deliver

The other channels (hotline/telco branch) are only used if they are unable to resolve their issues via the app. Even then they would prefer to use the app to schedule a call-back at their own convenience.

If they have to dial the hotline or queue at the branch to resolve their issues, this is seen as a failure of the app, and a negative experience.

Light app users would like to be better informed

Heavy users already log on frequently to the app to find out about promotions and rewards directly, and are not keen to receive further notifications.

Light users are informed of promotions through email advertisements and SMS notifications, but not very consistently, as both channels tend to get overwhelmed with spam. Nevertheless, there is strong appetite to be better informed about lifestyle discounts (such as 1-for-1 movie tickets).

“I detest contacting customer service. If I have to contact them, means I have an issue, so have to force myself to contact them. It’s stressful already.”

- Light app user

“I’m interested but I don’t know about all these limited time promos. They don’t send notifications on the app. You have to go in and check yourself.”

- Light app user
An app interface compared to other channels opens up new possibilities for complex telco management

App interface allows for advanced management

The app interface gives consumers visibility over their consumption and control over how they want to manage their plan. This makes it possible for consumers to explore and make use of more functions, increasing their engagement with the telco.

“I’m very reliant on the app, I’m doing so many things on it that having good experience is very important for me. I would switch providers if the app is slow or difficult to use.”

- Heavy app user

Attractive interface encourages expanded usage

A smooth and attractive interface with easy navigation improves the user experience, hence helping users get around the app with minimal steps. This encourages users to spend more time using and exploring the app to find out what it can do.

“It’s a small thing but if you improve the user experience, it builds loyalty. Like creating icons for categories that are clear, more tabs at the bottom for easier navigation.”

- Light app user
There is a strong preference for singular purpose telco apps where all details can be kept.

**App Preference**

- 70% of app users prefer a single app covering multiple functions.
- 30% of app users prefer multiple apps that cover specific functionality.

**Develop a clear niche, not a generic super-app**

Consumers see value in consolidating services but are skeptical of apps that try to be a jack of all trades. Build on core competencies as an essential provider of connectivity to add value to consumers’ daily routines.

"I already use App A for transport and food delivery. The telco app should not get too far from its core offering. If they want to go into other areas, it needs to be great."

- Heavy app user

Source: CJ2. Looking at the list below, how much do you agree or disagree with the following statements as to why you use <PIPE DUMMY CODE FROM S6a> apps?

CU9. Thinking about using apps in general, which of the following options would you prefer when using your <PIPE DUMMY CODE FROM S6a> services?

Total Sample = 300
Telcos have the opportunity to capture user attention and future usage through movie and entertainment content.

What ContentAppeals To Telco App Users?

<table>
<thead>
<tr>
<th>Content Type</th>
<th>Availability</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>News</td>
<td>52%</td>
<td>51%</td>
</tr>
<tr>
<td>Movies</td>
<td>49%</td>
<td>62%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>45%</td>
<td>54%</td>
</tr>
<tr>
<td>Music</td>
<td>42%</td>
<td>47%</td>
</tr>
<tr>
<td>Asian/Local</td>
<td>39%</td>
<td>43%</td>
</tr>
<tr>
<td>International</td>
<td>38%</td>
<td>42%</td>
</tr>
<tr>
<td>Gaming</td>
<td>N/A</td>
<td>29%</td>
</tr>
<tr>
<td>Sports</td>
<td>29%</td>
<td>30%</td>
</tr>
<tr>
<td>Kids</td>
<td>18%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Potential opportunity

ST4. Which of these following types of content appeal to you?
ST5. And which of these types of content do you think are widely available to you?

Total Sample = 300
Telco app users are drawn towards longer form entertainment when using TV apps

**What Content Appeals To Telco App Users On TV Apps?**

- **Movies**: 55%
- **Drama**: 44%
- **Catch up TV**: 38%
- **International Content**: 37%
- **Local TV**: 32%
- **Sports**: 24%

*Potential opportunity*

ST6. What kind of content would you watch on your TV app? By TV app, we mean Catch-up TV or OTT app

Total Sample = 300
App Engagement: Key insights and recommendations

Insights

- **App engagement has a positive correlation with customer retention**: brand satisfaction buoys upwards
  - 28% of ‘most frequent’ users are highly satisfied with the brand (increasing to 60% among the top 3 box)
  - 84% of ‘most frequent’ users are “quite or very likely” to stay with the brand

- **56% of app users** prefer to **engage via apps**. Apps are preferred for their security, ease of use, and access

- Activity repertoire in apps is limited; users focus on data usage (63% perform regularly) and bill tracking (60%), but secondary functions are underutilised

- App users are encouraged to **continue usage** when apps are proven to be **secure (34%)**, have been **updated regularly (33%)**, and take up minimal room on **smartphones (31%)**

Recommendations to improve brand metrics

- **Upkeep core features that bring app users back**
  E.g. viewing bills (63% perform regularly) and tracking data (60%). Telco apps are becoming increasingly popular for redeeming rewards (43%) and discounts (43%)

- **Maximize opportunity areas around entertainment**
  Is there appetite for entertainment through telco apps? Currently usage of music (11% perform regularly), video (7%), and gaming (7%) in telco apps is low. Other markets see higher usage and these activities elicit high satisfaction

- **Raise awareness of underutilized yet helpful features**
  Underutilized features like customer service engagement (15% perform regularly), or tech troubleshooting (8%) may feel too stressful via apps; brands need to demonstrate how seamless support is in-app, amplifying this by being regular in updates and bug fixes to promote continued usage
App Satisfaction

How satisfied is the user with the app?
Strong app satisfaction creates a strong link to brand affinity

App Satisfaction

R² = 0.8997

App Familiarity

App Discovery and Onboarding

App Engagement

App Satisfaction

Think with Google
Strong app satisfaction are also positively correlated with brand loyalty and advocacy

<table>
<thead>
<tr>
<th>Affinity (among brand users)</th>
<th>Satisfaction (among brand users)</th>
<th>Retention (among brand users)</th>
<th>NPS (among brand users)</th>
</tr>
</thead>
<tbody>
<tr>
<td>9 in 10 like / love the brand (top2box)</td>
<td>7 in 10 are satisfied with the Brand (top2box)</td>
<td>9.5 in 10 are likely to stay with the brand (top2box)</td>
<td>7 in 10 are likely to recommend the brand (top2box)</td>
</tr>
</tbody>
</table>

When consumers are satisfied with their app there are strong positive links with all metrics

If recommendation is high, it will leading to new consumers starting their app journey.
Satisfaction will be driven by meeting key motivators; providing Covid safety and convenience

### Primary Motivations To App Usage

<table>
<thead>
<tr>
<th>Covid Safety (% strongly agree)</th>
<th>Convenience (% strongly agree)</th>
</tr>
</thead>
<tbody>
<tr>
<td>They keep me safe during the Covid pandemic as I do not have to go outside</td>
<td>19%</td>
</tr>
<tr>
<td>I can use them from anywhere and at anytime</td>
<td>24%</td>
</tr>
<tr>
<td>They are more convenient than going in-store</td>
<td>18%</td>
</tr>
<tr>
<td>I prefer to use digital payments over cash</td>
<td>16%</td>
</tr>
<tr>
<td>Apps are safer than using cash</td>
<td>15%</td>
</tr>
<tr>
<td>I like the ability to top-up my mobile data / pay my bills plan through the app</td>
<td>15%</td>
</tr>
<tr>
<td>I trust them to keep my details safe</td>
<td>14%</td>
</tr>
</tbody>
</table>

Source: CJ2. Looking at the list below, how much do you agree or disagree with the following statements as to why you use «PIPE DUMMY CODE FROM S6a» apps? Total Sample = 300

Health and safety is a priority as a result of the pandemic with app users moving to digital over physical currency

Speed and convenience are motivators to app usage
Regular tasks elicit high satisfaction; these need to be seamless and instant - and appear to be delivering well.

**Frequent Activities x Satisfaction**

Apps need to continue to deliver to these critical activities.

<table>
<thead>
<tr>
<th>Satisfaction</th>
<th>Performed Weekly (frequency)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infrequent yet Satisfied</td>
<td>0%                 10%                  20%                     30%                    40%                    50%                   60%                  70%</td>
</tr>
<tr>
<td>Crucial Tasks, Performing Well</td>
<td>Make bill payments (Post Paid)</td>
</tr>
<tr>
<td>Infrequent and below Average Performance</td>
<td>5</td>
</tr>
<tr>
<td>Frequent yet Underperforming</td>
<td>6</td>
</tr>
</tbody>
</table>

Source: CU13. How satisfied are you with your app experience when it comes to the following activities within your <PIPE DUMMY CODE FROM S6a> apps?

CU12. How frequently do you perform the following activities within your <PIPE DUMMY CODE FROM S6a> apps?

Total Sample = 300
Telco brands can expand on current data tracking and payment options to meet changing consumer needs

Virtual payments & storage

With an influx of new users, expectations are constantly shifting on what brands should deliver. In some advanced cases, telco app users are looking for alternative payment methods and extra add-ons for storage and discounts

- “Paypal payment!”
- “Mobile wallet with a lot of rebates”
- “Cloud storage”
- “Transactions using cryptocurrency”
- “Connect to favepay, discounts and perks”

Source: CUB. Are there any features you wish your apps had that are currently not available? Total Sample = 300
Flexible Data

Telco brands can expand on current data tracking and payment options to meet changing consumer needs.

Most users across any category are looking to minimise costs, and this doesn’t stop at Telco apps - brands can look to reward long-time users for their loyalty, especially among those struggling with finances during Covid.

- “Rollover of unused data from prior months”
- “Unlimited data plan”
- “Rewards program to earn points for loyalty”
- “Free roaming for overseas travel”
- “Flexible data and airtime allocation”

Source: CUB. Are there any features you wish your apps had that are currently not available? Total Sample = 300
Telco brands can expand on current data tracking and payment options to meet changing consumer needs

Data Tracking

Given how common the behaviour is, data tracking should be a maintained and up-to-date feature of many Telco apps. Users want to keep an eye on their data, and would appreciate additional statistical features that can help track individual trends and manage their usage easier

- “Quick glance dashboard”
- “Alert me when my data almost used up”
- “Update on data used and remaining data daily through SMS or in app notification”
- “It’s quite comprehensive but would be great if they could integrate the graph of month on month usage”

Source: CUB. Are there any features you wish your apps had that are currently not available? Total Sample = 300
Poor experience leads to deletion - alongside lack of usage, storage concerns or interruptions (notifications, ads)

Satisfaction: Deletion Top 10

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I don't use it enough</td>
<td>27%</td>
</tr>
<tr>
<td>It has bugs / keeps crashing</td>
<td>26%</td>
</tr>
<tr>
<td>Poor interface</td>
<td>25%</td>
</tr>
<tr>
<td>There were too many ads</td>
<td>23%</td>
</tr>
<tr>
<td>It takes up too much memory on my smartphone</td>
<td>21%</td>
</tr>
<tr>
<td>It seemed to be draining my battery</td>
<td>21%</td>
</tr>
<tr>
<td>It was using too much data from my mobile data plan</td>
<td>17%</td>
</tr>
<tr>
<td>I was having a general clean up of my apps</td>
<td>17%</td>
</tr>
<tr>
<td>It's too difficult to use</td>
<td>16%</td>
</tr>
<tr>
<td>It gives too many push notifications</td>
<td>15%</td>
</tr>
</tbody>
</table>

If an app is not used it will lead to deletion especially if the apps are taken up too much storage in terms of smartphone space, data and battery draining. Space may be limited for many - especially if more apps have been downloaded during Covid meaning storage space is at a premium.

Unsurprisingly, app users will lose patience with apps that deliver a poor and frustrating performance. Updates need to be regular to fix bugs and improve features.

App users will get frustrated by regular interruptions such as notifications and advertising (both need to be hyper relevant and as infrequent as possible).

Some find apps difficult to use - are these those who have recently migrated to digital due to Covid?

Telco app deletion is rare. Consumer are tied to their provider - but apps still need to hit expectations or brand equity will suffer.

- 35% do not delete telco apps
- 41% delete telco apps less often than every few months

Source: CJ9. Thinking now specifically about <PIPE DUMMY CODE FROM S6a> apps, what are the typical reasons why you delete / uninstall these?

CJ10. Thinking of the reasons you chose previously, please rank in terms of importance when it comes to deleting a <PIPE DUMMY CODE FROM S6a> app

Total Sample = 300
App Satisfaction: Key insights and recommendations

Insights

- App satisfaction is strongly correlated with brand recommendation - 72% of whom rate an app as “perfect” regard themselves as brand promoters.

- 70% of app users would prefer a multi-functional singular app compared to multiple single purpose apps.

- As well as providing a channel that is safe during Covid such as an app, brands can meet changing consumer needs providing convenience - 24% strongly agree they enjoy having access anywhere or anytime, and 18% strongly agree apps are more convenient than going in-store.

Recommendations to improve app metrics

- Get the basics right, consistently
  Ensure critical tasks (e.g. data tracking) are reliable and seamless. Bugs and poor interfaces quickly put users off.

- Understand changing consumer needs
  Primary reasons for using Telco apps include staying safe at home during Covid (19%) & preferring digital over cash (16%)

- Innovate to meet consumer needs
  Data tracking, while a simple task, could be more in depth for some (built-in charts), and come with different offerings like roll-over data or free-roaming. Tech-savvy consumers are looking for alternative payment methods like crypto or e-wallets

- Prepare for new opportunities
  Despite low usage, entertainment in telco apps is an opportunity to sustain regular usage - if brands want to create content that appeals to telco app users, the opportunity lies in movies (as less supply vs. demand)
Thank you