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# Apps: How to realize their full value

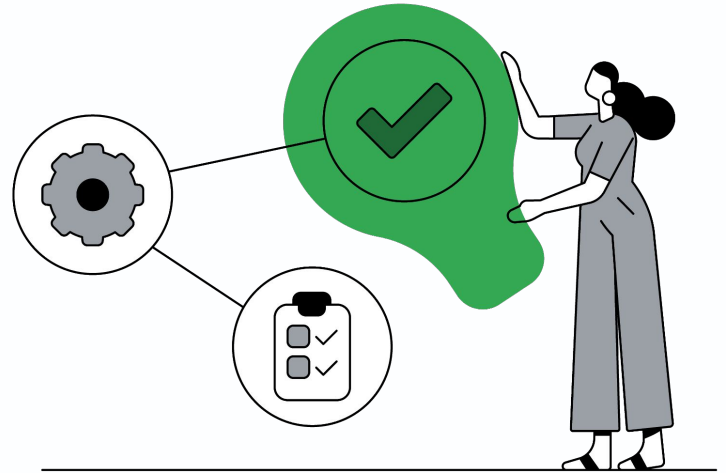
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Telco, Thailand



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# 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=1000 for Thailand Quantitative, with n=350 for Telco subset and 2 playgroups (n=4, each) per vertical for Qualitative research. Research covered 5 brands and their respective apps, as well as 4 other telco apps\*.

**KANTAR**

(Quantitative)

**SIXTH  
FACTOR**

(Qualitative)



## Respondent Criteria

### Quantitative

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

### Qualitative

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

Using screen-out data, the incidence of telco app usage is approximately 56%



# Who are generally using telco apps?

## Profiling

### Gender

39% Male                      61% Female

### Age

45% (18-34)                      55% (35-64)

### Income

Less than 24,999 Baht	19%
25,000 - 49,999 Baht	32%
50,000 - 79,999 Baht	30%
80,000 Baht or more	19%

### Internet Usage

99% Daily

### Operating System

81% Android                      19% iOS

### Region

70% Metro                      30% Non-Metro

### Connection Devices

Smartphone	100%
Tablet	49%
Laptop Computer	63%
Desktop Computer	62%
Smart Speaker	22%

### Smartphone Storage

Under 16GB	1%
16GB	3%
32GB	22%
64GB	31%
128GB	23%
Over 128GB	17%

### Prepaid v/s Postpaid

Top up online	34%
Top up in-store	3%
Contract/Fixed bills	63%



# 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?

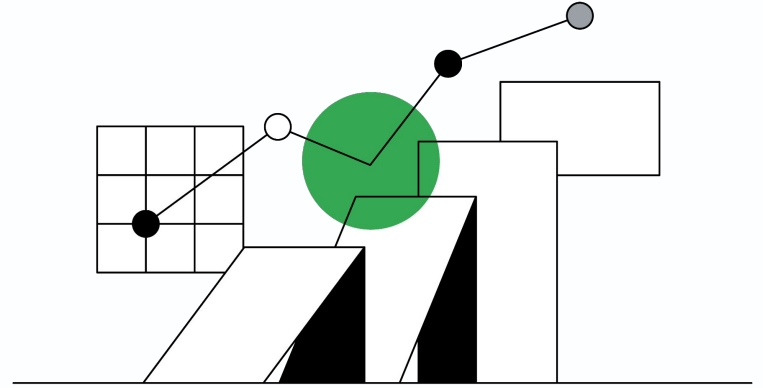
**05** | Deep dive into consumer app behaviour: types of app activities, frequency of usage and reasons for install, deletion and usage

**06** | What are prepaid payment habits? What is the sentiment towards USSD? What type of content do they enjoy on telco apps?



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# 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 trialed 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)”





# App Discovery and Onboarding:

## Key insights and recommendations

### Insights



- Awareness of telco apps is high. Around **95 -100%** of parent telco brand's customers are **aware of telco apps**
- Penetration has room to improve. Between **9 - 43%** of customers are **not using the apps of their current telco**
- Installed apps are also likely to become dormant or end in deletion without a proper usage guidance. **26%** of App users have installed a telco app but never used
- Successful app onboarding is a starting link to building brand affinity. **65% of successful onboarders have a strong brand affinity**

### Recommendations to improve brand metrics



- **Focus on encouraging trial and successful onboarding**  
App awareness is not an issue, brands should spend more effort on promoting install or trial
- **Encourage installation through regularly used and influential touchpoints**  
e.g. app stores, brand websites, social networks, staff recommendations
- **Ensure a seamless trial experience to avoid dormancy or deletion**  
Key reasons why app users do not try apps after install are: a lack of understanding (35%); a complicated app design (26%); complex sign-up processes (26%)

Simple digital processes could help trial and sign up. Users need education and reassurance about usage of telco apps



# App Engagement:

## Key insights and recommendations

### Insights



- App engagement has a strong positive correlation with brand satisfaction and customer retention
  - **66%** of 'most frequent' users are satisfied with the brand
  - **97%** of 'most frequent' users are "quite or very likely" to stay with the brand
- **52% of app users** prefer to engage with telcos via apps - users find Apps are quick, easy and safe. Many have multiple apps installed.
- Apps are preferred across all key telco activities; over 80% state they prefer to use an app for critical tasks such as viewing bills, bill payments, looking for discounts
- App users are encouraged to continue usage when apps are proven to be **secure (43%)**, use **less memory (39%)**, and when the app is **updated regularly (39%)**

### Recommendations to improve brand metrics



- **Upkeep core features that bring app users back**  
E.g. viewing bills (54% perform regularly), paying bills (49%), and track data (45%)
- **Maximize opportunity areas around rewards and discounts**  
Telco apps are becoming increasingly popular for redeeming rewards (60% perform regularly) and discounts (65%) whereas prepaid functionality is underused as Thailand is predominantly postpaid
- **Raise awareness of underutilized yet helpful features**  
Assuming they work well, underutilized entertainment features such as video (20% perform regularly), music (18%) and gaming (17%) can help increase the value of an app to users



# App Satisfaction:

## Key insights and recommendations

### Insights



- App satisfaction is strongly correlated with brand recommendation - **97% who positively rate the app regard themselves as brand promoters**
- **79%** 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 - **53% strongly agree they can use apps from anywhere; 48% state they are more convenient than in-branch**
- **36% of telco app users** are **prepaid customers**, with app payments being a growing trend due to ease and convenience

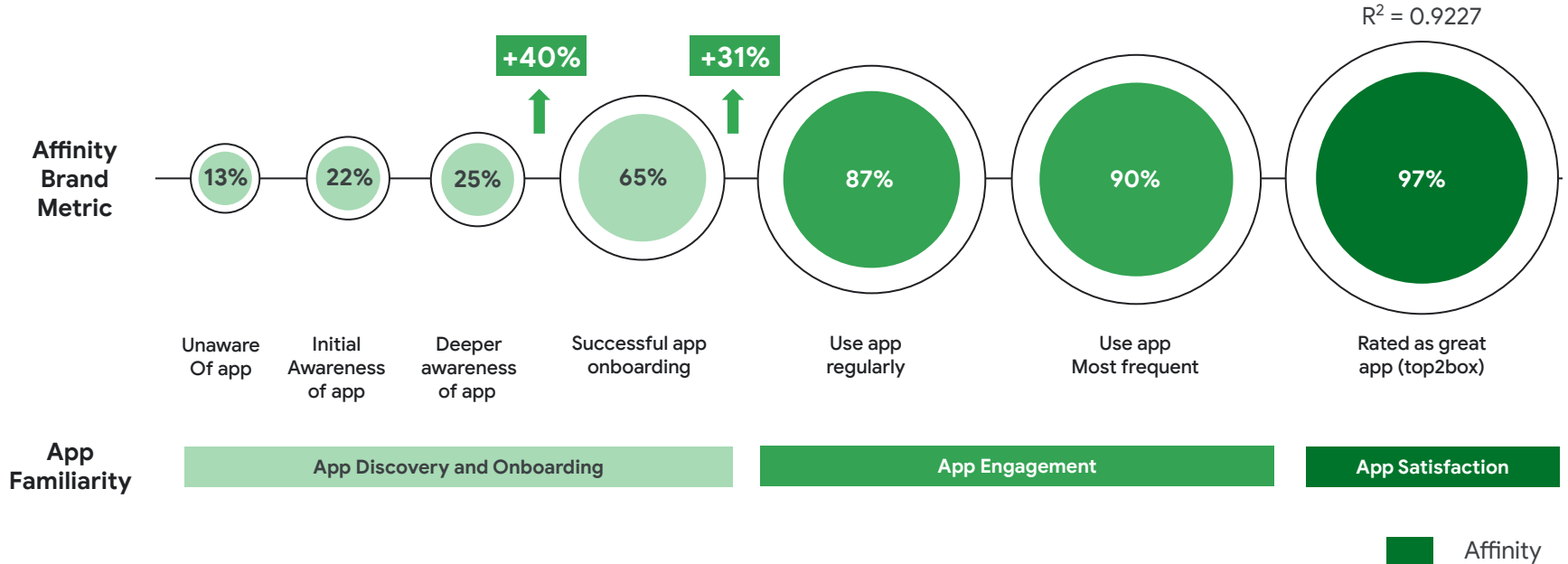
### Recommendations to improve app metrics



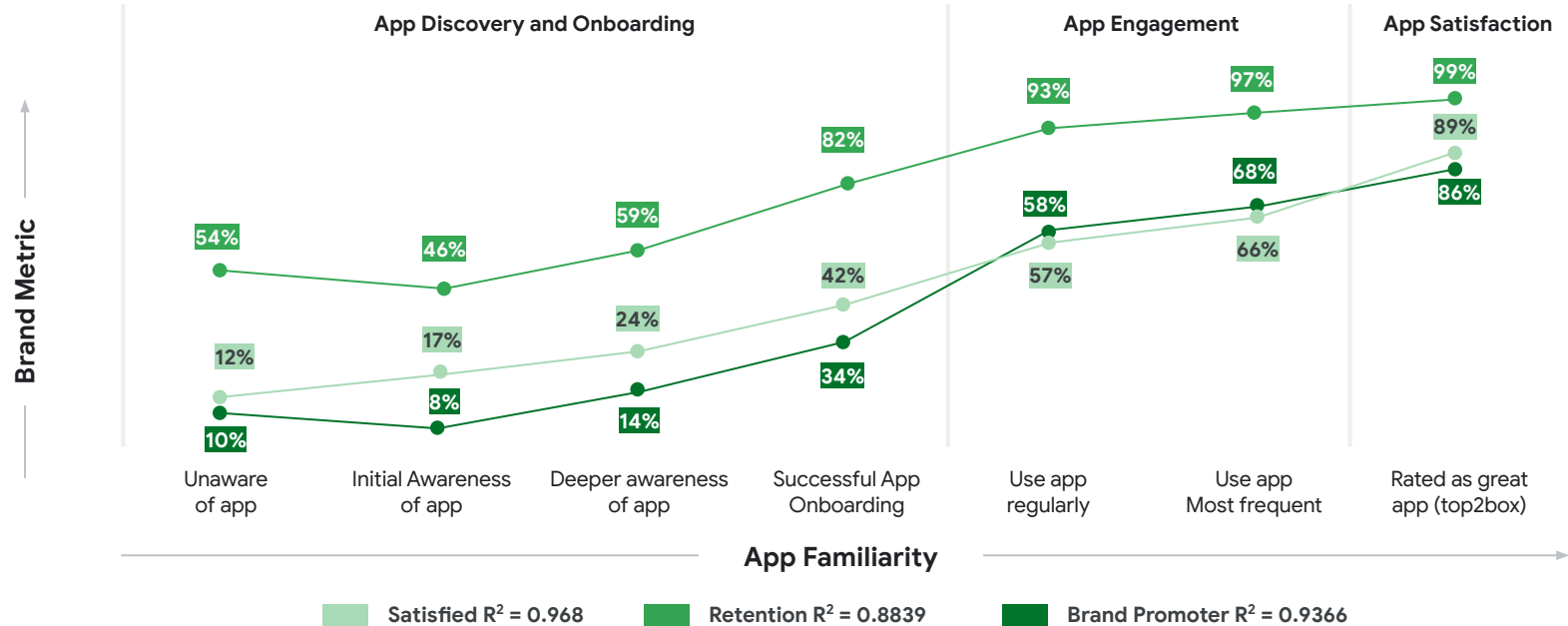
- **Get the basics right, consistently**  
Ensure critical tasks (e.g. tracking usage, top ups, bills) are reliable, seamless & elicit high satisfaction. Bugs and poor interfaces quickly put users off.
- **Meet needs of secondary functions**  
Rewards and discounts are popular activities but they seem to be underperforming slightly. Can brands offer more?
- **Understand changing consumer needs**  
Primary reasons for using telco apps include staying safe during the pandemic and digital being safer than cash
- **Innovate to meet consumer needs**  
Entertainment options within telco apps gain very high satisfaction among the groups that use them - an opportunity to upscale these functions (particularly movies and gaming content). Gaming is popular and consumers are looking to monetize this in the future. Voice is also a desired innovation




There is a strong relationship between brands metrics and app usage. Increase in brand metrics are evident as a user engages more with the app



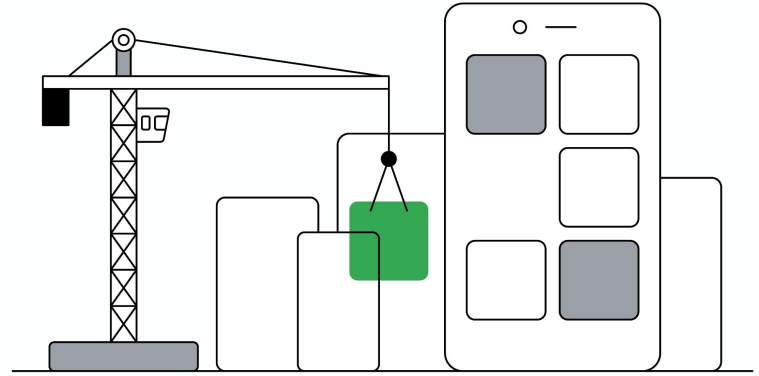
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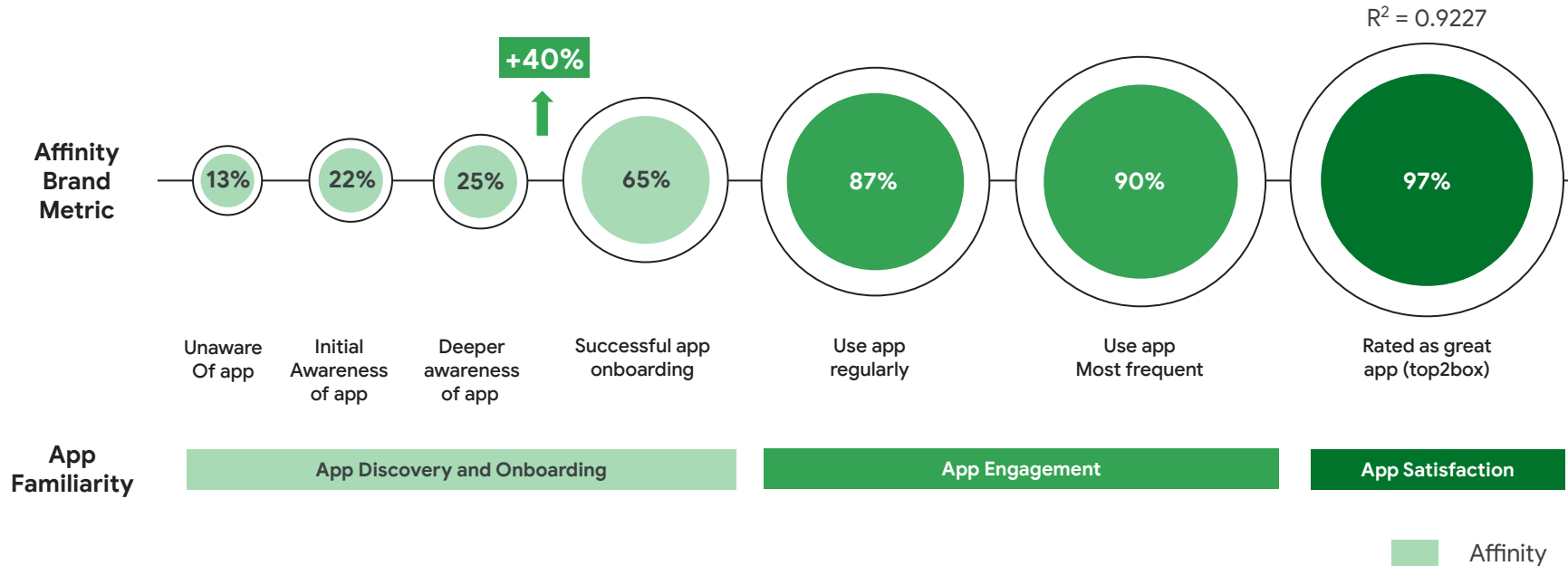


# App Discovery and Onboarding

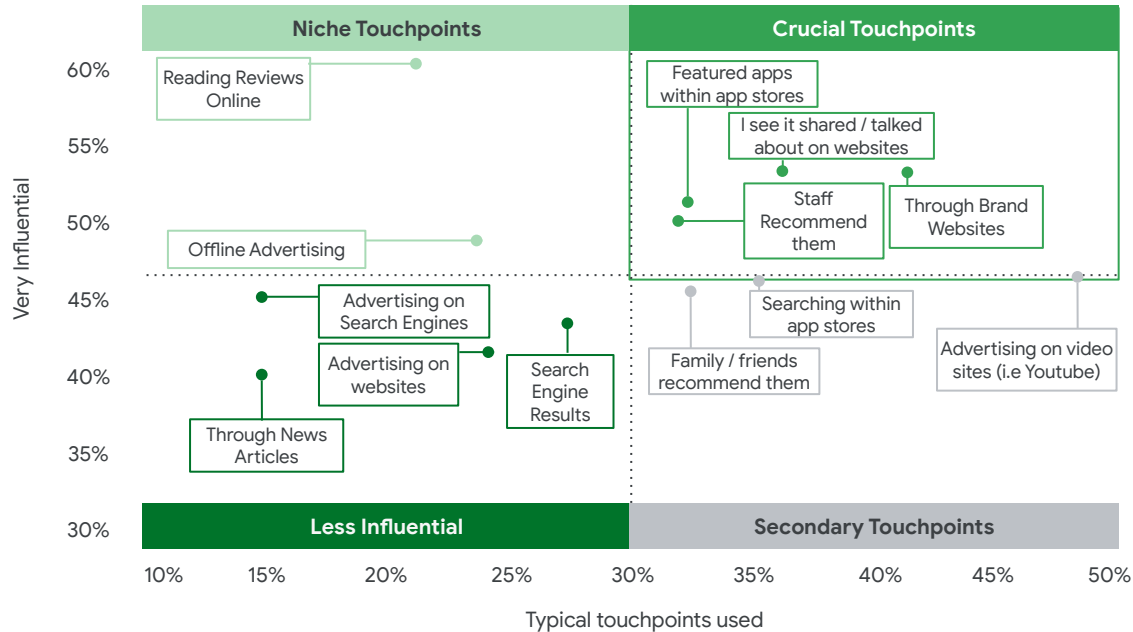
How does awareness and onboarding of  
an app impact brand metrics?



The highest increase in brand affinity occurs when a user transitions from install to successfully onboarding on an app



# Prioritise featured ads in app stores, brand websites and social to drive awareness; leveraging staff is also important

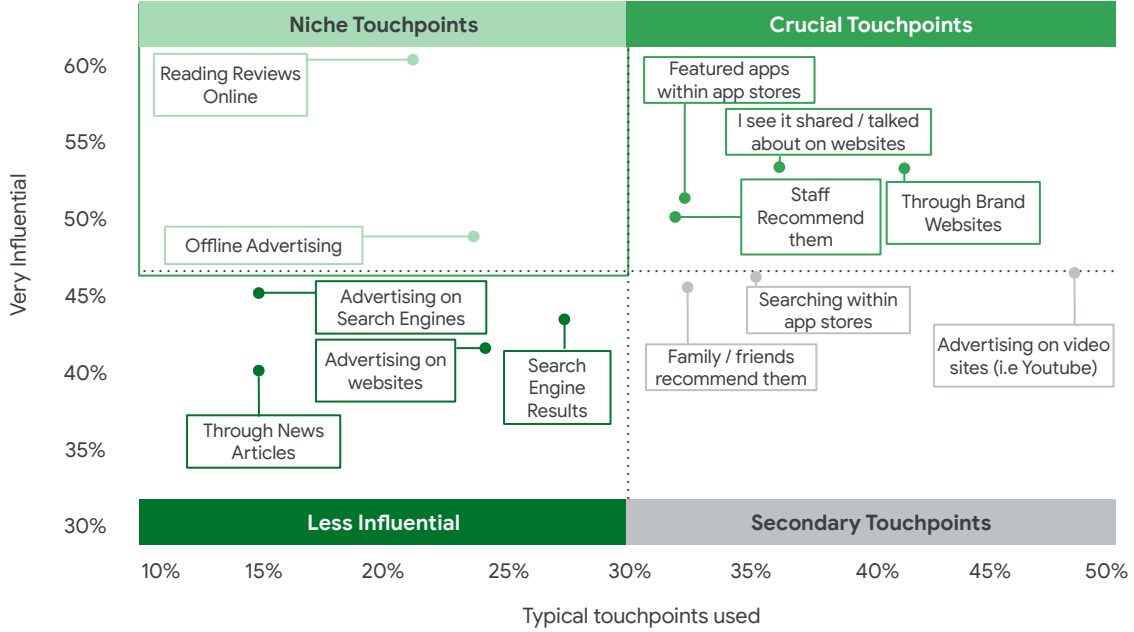


Crucial Touchpoints	
Touchpoints that are frequently used and influential in installation decision making	
Online	Offline
I see it shared / talked about on social networks	Staff recommend them
Brand websites	
Featured apps within app stores	





# Opportunity to encourage app users to leave online reviews as these are highly influential on decision making

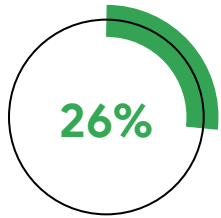


**Opportunity / Invest Touchpoints**  
Touchpoints that are not frequently used yet are influential in installation decision making

Online	Offline
Reading reviews online	Through offline advertising



1 in 4 have an app installed that they never used, due to not understanding what the app offers or down to poor design



have installed at least one telco app but never used

### Reasons to install but not use

I use a different app instead	40%
I don't understand what the app provides me	35%
The app design or user experience is complicated	26%
The sign up process looks complex	26%
I need someone to help me / teach me more	21%
I haven't had the time	20%
It is too risky to sign up to new products during Covid-19	15%

# Main telco apps are well-established, but customers need assurance on how their information is being kept and used

## Onboarding is smooth, but registration can be improved

Thai consumers are used to telco apps and capable of independently searching for, downloading, and registering on their own. However, there is still room for improvement in terms of **making registration more seamless** and **reassuring consumers about how their data is being used**.

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“ At the beginning... you enter a lot of information because that's the first time that you would use it. It's okay to enter important data. But the telco provider has to make sure that that personal information is very secure, for example, ID card number credit card number, so at first they should give us that confidence.

- Heavy app user

## Facilitate more exploration of new content/functions

As Thai consumers are relatively tech-savvy, they are comfortable with apps in general and **confident to explore the telco apps on their own**. As a result, they have discovered many functions beyond the basic telco management needs, such as gaming, content, and lifestyle rewards. **A well-laid out and attractive app can further encourage discovery** of new functions.

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“ I bought a plan that lets me use social media for free and with faster internet and it also includes TrueID. It's just a few hundred baht extra, and I get a free subscription to try.

- Light app users

# App Discovery and Onboarding:

## Key insights and recommendations

### Insights



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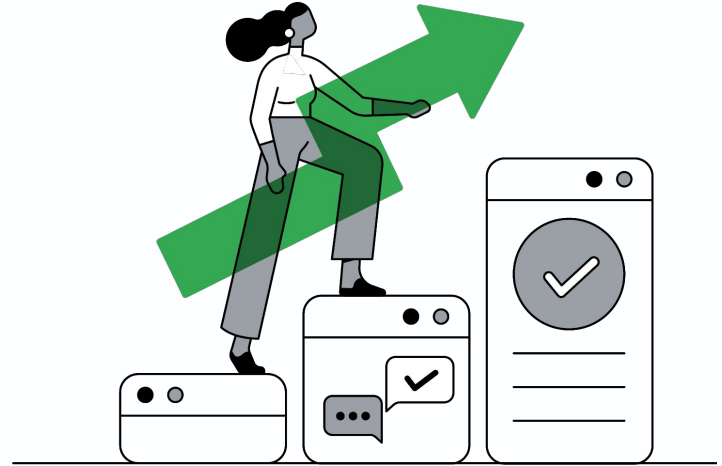
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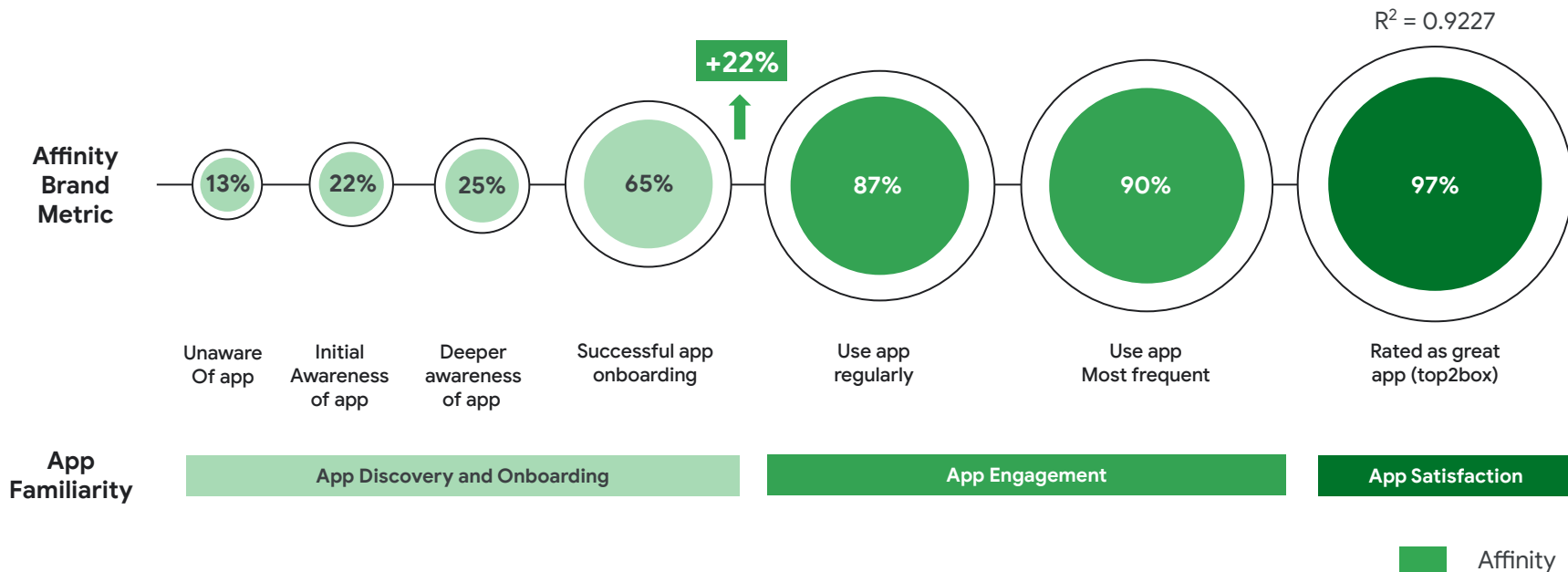
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# App Engagement

How frequently is the app used?



# There is another jump in brand affinity when a user moves towards using an app regularly



# So how do we deepen app engagement?

After increased usage where an app become the favoured app (“most frequent” used).....

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

## Key for App Engagement

**01** Brand affinity is strongly linked to levels of app engagement

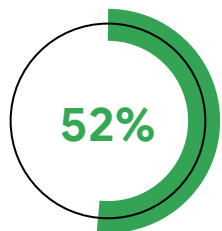
**02** Correlation with brand satisfaction has risen dramatically as engagement deepens

**03** Nearly all consumers are likely to stay with the brand. Very strong correlation

**04** Correlation with recommendations has risen as engagement deepens - links to the stronger brand affinity



# Apps are the preferred channel for app users to interact with a telco provider



prefer to engage with brands through their apps

35 - 64 year olds are skewing the results for preferring to speak with employees on the phone (54%)

29% Via an employee on the phone

11% Via their website

5% Via an employee in person

3% Via email





# App users have multiple telco apps installed which appear to have specific functions for them

2.7

telco apps installed on average

6.4

activities are regularly performed in telco apps, on average

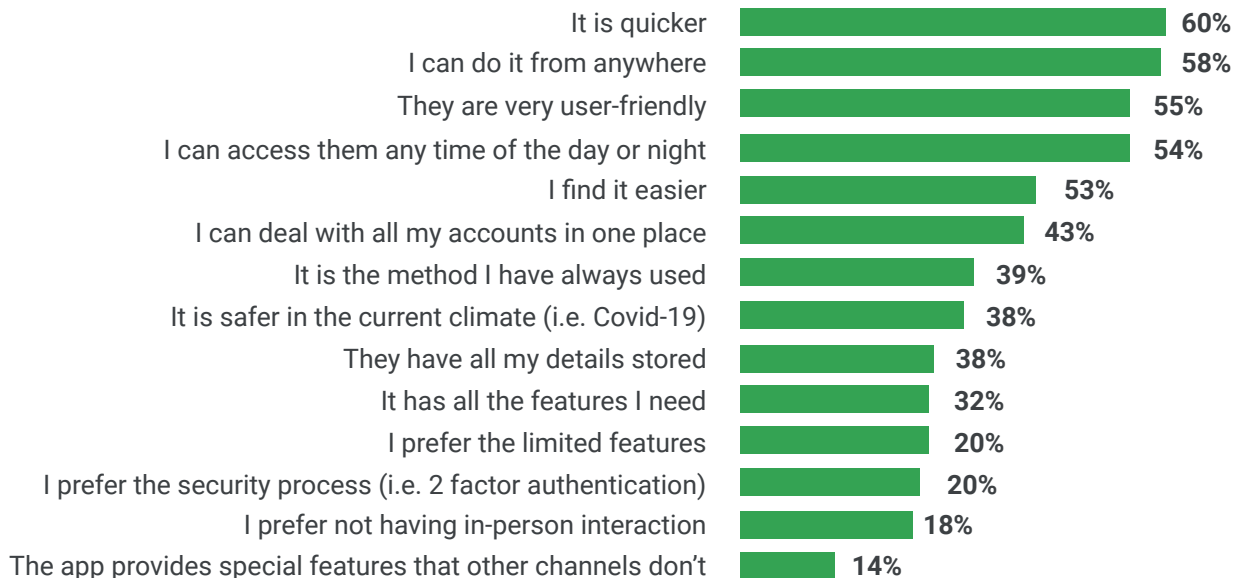
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activities are performed weekly, on average

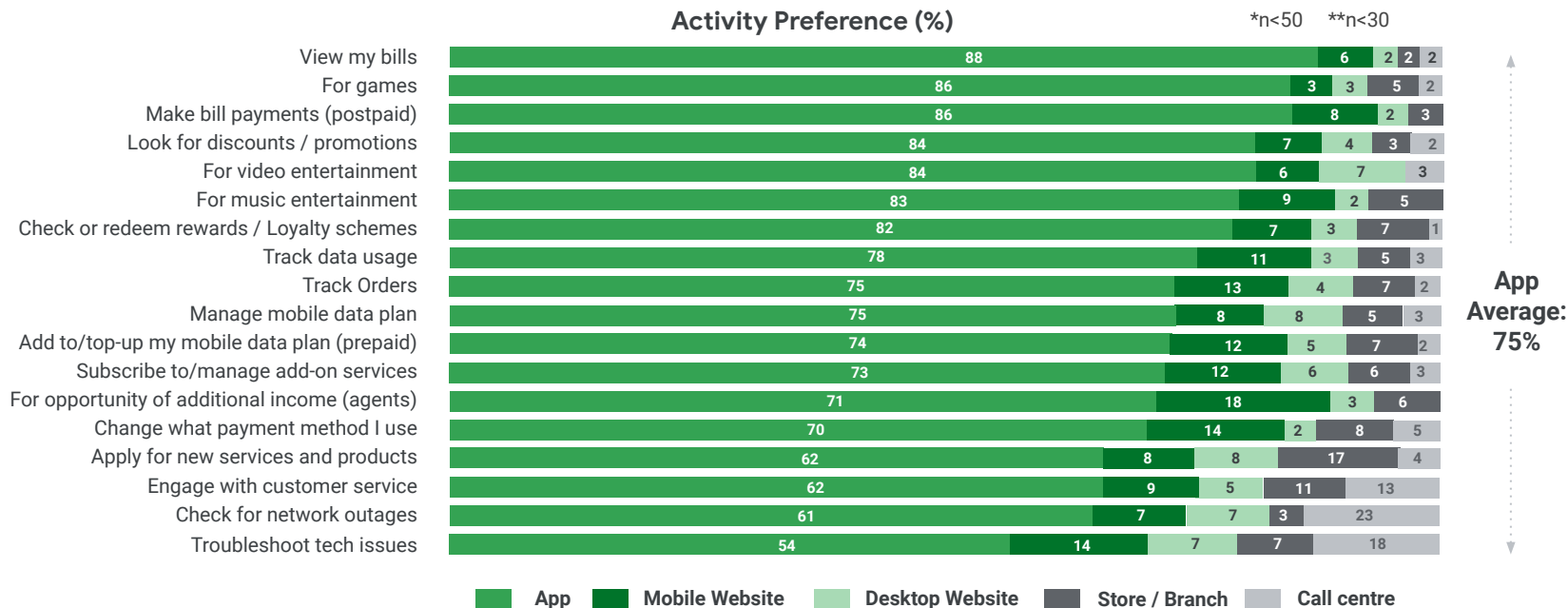


# Apps are preferred channel to engage with telco providers as they are quick, convenient and easy

## Reasons for engaging with brands through an app

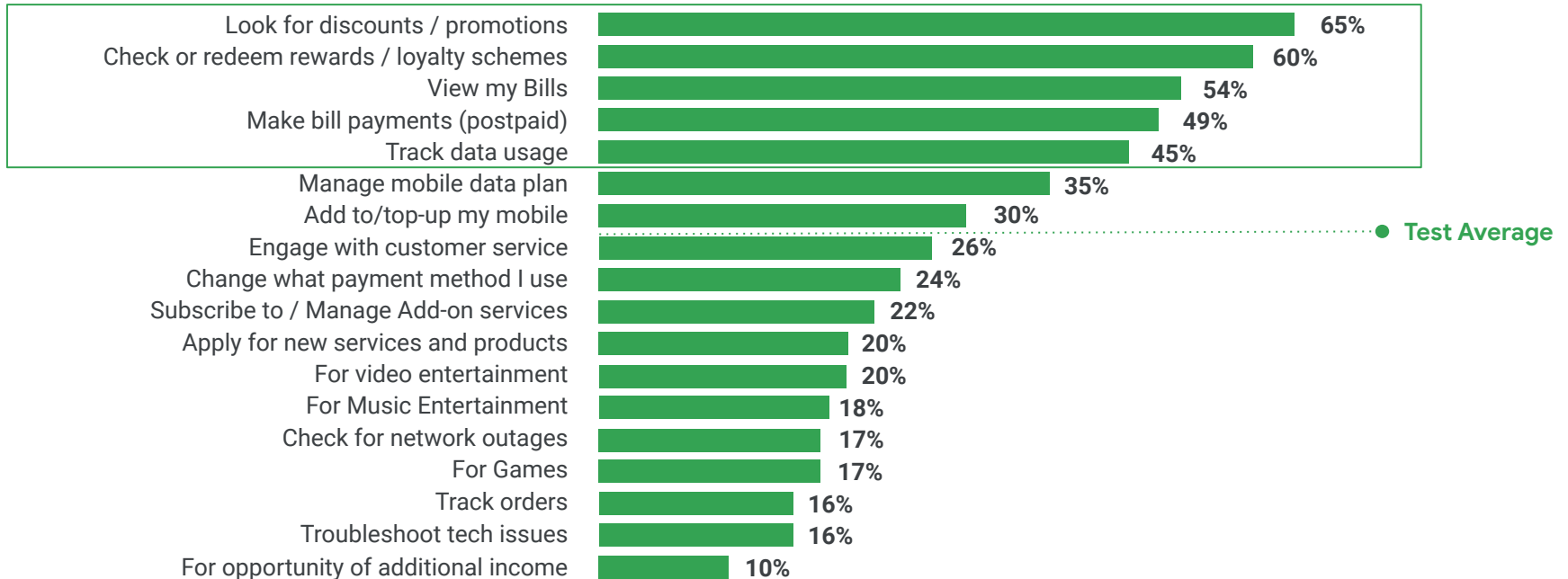


# There is a strong preference for apps across all activities, managing bills and entertainment are key pulls for app usage



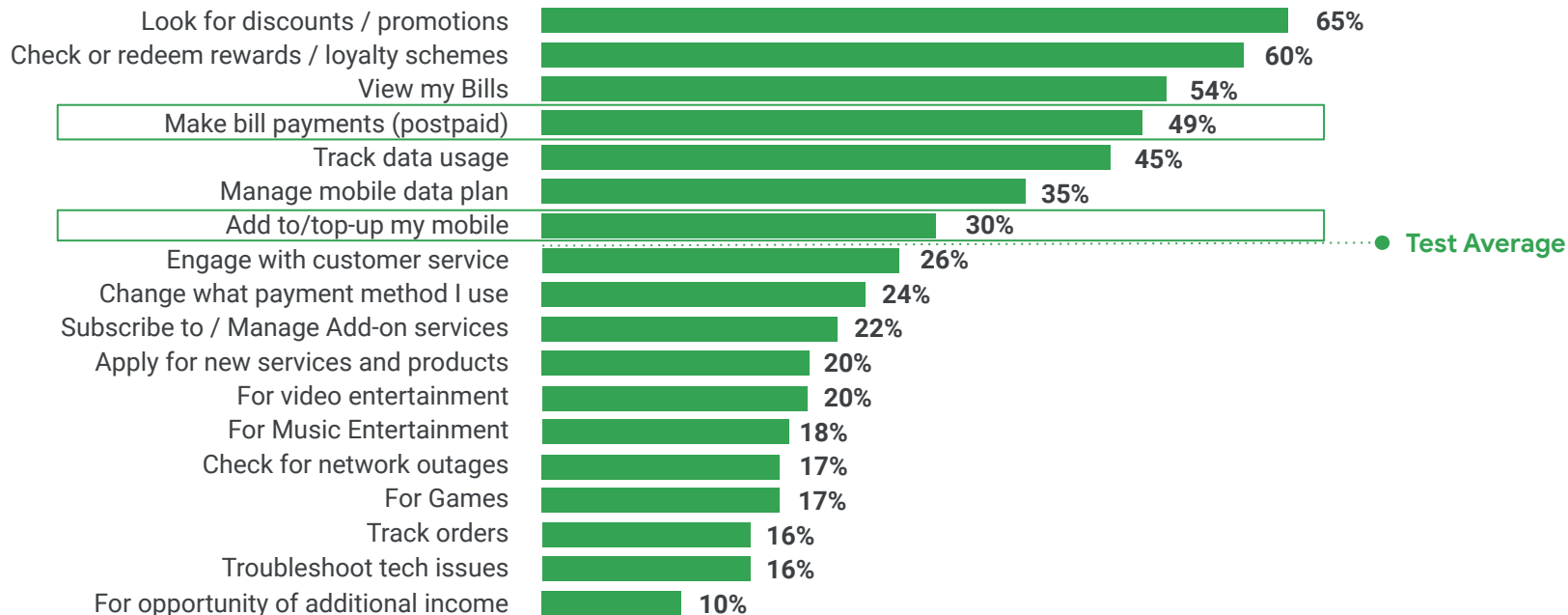
# Telco apps are used to help tracking and payment - as well as money saving through discounts and rewards

### Common Telco App Behaviours



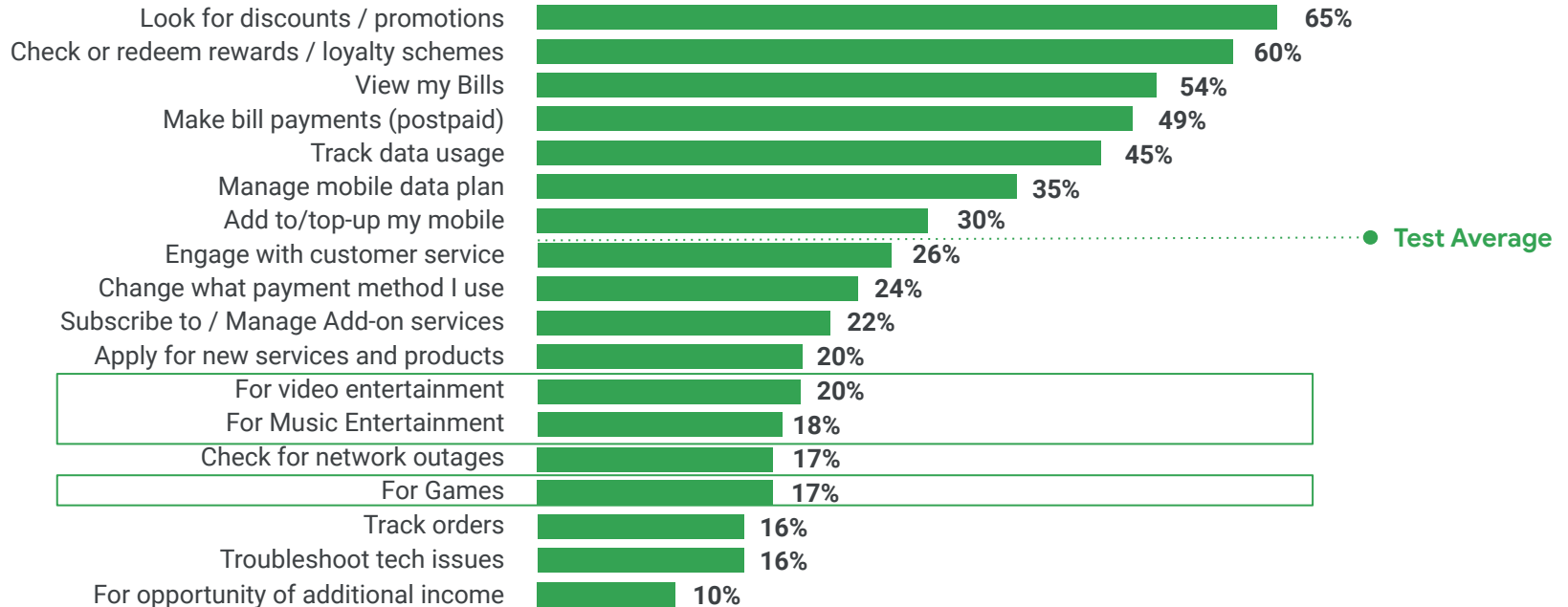
# Being a postpaid market, there is less management of mobile data in Thailand

## Common Telco App Behaviours

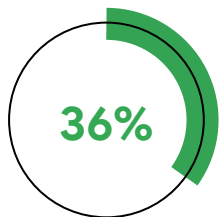


# Some users are regularly looking for entertainment in Telco apps, an opportunity to continue pursuing

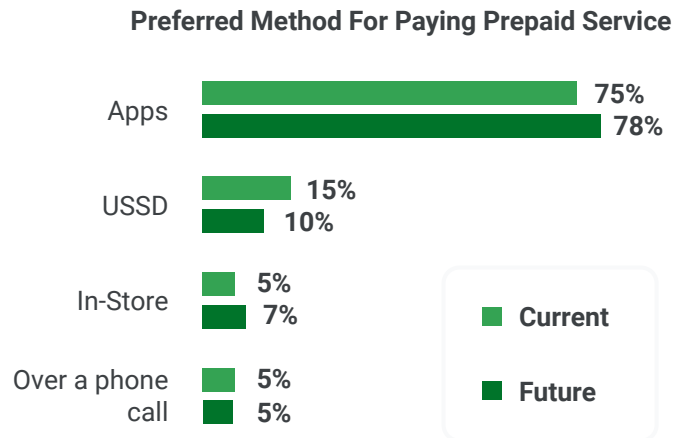
## Common Telco App Behaviours



# 4 in 10 telco app users are using prepaid service and the majority prefer to renew their credit via apps



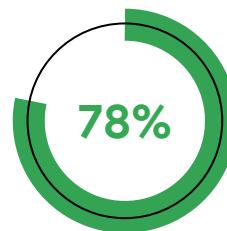
of telco app users are paying for their smartphone services through prepaid means



# Payment via apps offer convenience and help users to manage their plan

## Reasons For Choosing Telco Apps

It will be the most convenient option for me	76%
I think it will be easier to manage my plan	53%
It is my current method and I prefer to keep it the same	36%
I've been recommended to update my service via apps	21%
I'm unsure of how to update my service in a different way	8%



of prepaid users are intending to go with apps as their preferred payment in the future

Among the 15% of prepaid users currently using USSD for payment, 75% will look to switch to Apps in the future

[Note very small base size, n<20]





# App users continue to use apps if they are regularly updated and provide safety in terms of both data and health

## Continued Usage (Top 10)

I have to use the app as it is with my provider	47%
If it proved it was secure and safe	43%
It takes up less memory on my smartphone	39%
If the app was updated regularly with new, useful features	39%
When the app notifies me of any changes	32%
If the app was updated regularly to fix bugs	32%
If it sends useful notifications	31%
If a social media influencer endorsed it (e.g. YouTube, Facebook)	29%
If I saw the app used / talked about on social media	27%
If it shows its relevance during COVID-19	22%

Telco app users are generally trusting of apps in terms of data security but any lapses would result in potential deletion. It is still a topic that is at the forefront of app users' minds even if current levels of trust appear solid - things can easily change and apps need to ensure security is always a top priority.

Consumers appear to be conscious of data and storage despite a preference for singular multi-functional apps.

Regular updates are crucial to continued app usage whether it be 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 banking

We have seen that WOM is a key influencer in the path to purchase - but it doesn't end just at download. These recommendations need to continue into usage to encourage repeated and regular behaviour. People influence people.



# The app provides more opportunities for customers to engage with the telco

## More than just telco management

The app interface allows users to manage their telco plans more conveniently, but also offers **plenty of other functions to give consumers reasons to use the app**, including games, content, and browsing for lifestyle rewards.

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“ I pay the bill on the app and then I use points to redeem the discount or I can get the discounts at the stores and also I can order something online. And I can watch movies on the app too.

- Light app user

## Engagement with rewards drives usage

Rewards and promotions have become a **key expectation for consumers** when it comes to telcos, and the app is the **key touchpoint for them to access these benefits**. The more engaged they are with the rewards programme, the more often they log in to check for promotions and redeem points.

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“ I check for promotions every day. Whenever I go to the store or when I go to the malls, I have to check if the restaurants have the promotion on the telco app.

- Heavy app user

## Intuitive UI to improve user experience

As consumers do more with their apps, a smooth, pleasing interface with easy navigation becomes increasingly important for a good user experience. This means helping them get around with **minimal steps**. A well-designed app **boosts quality and service perceptions**.

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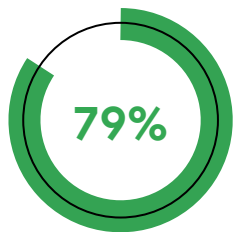
“ If I can customize it or have anything that I use frequently on the top, that would be good. What I'm interested in should be upfront or on the first page so I can find it easily and use it.

- Light app user

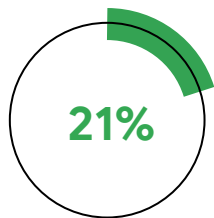


# There is a strong preference for singular purpose telco apps where all payments / top-ups can occur

## App Preference



of app users prefer a **single** telco app covering multiple functions



of app users prefer **multiple** apps that cover specific functionality

## Influences to App Usage

"I like the ability to top-up my mobile data / pay my bills plan through the app"



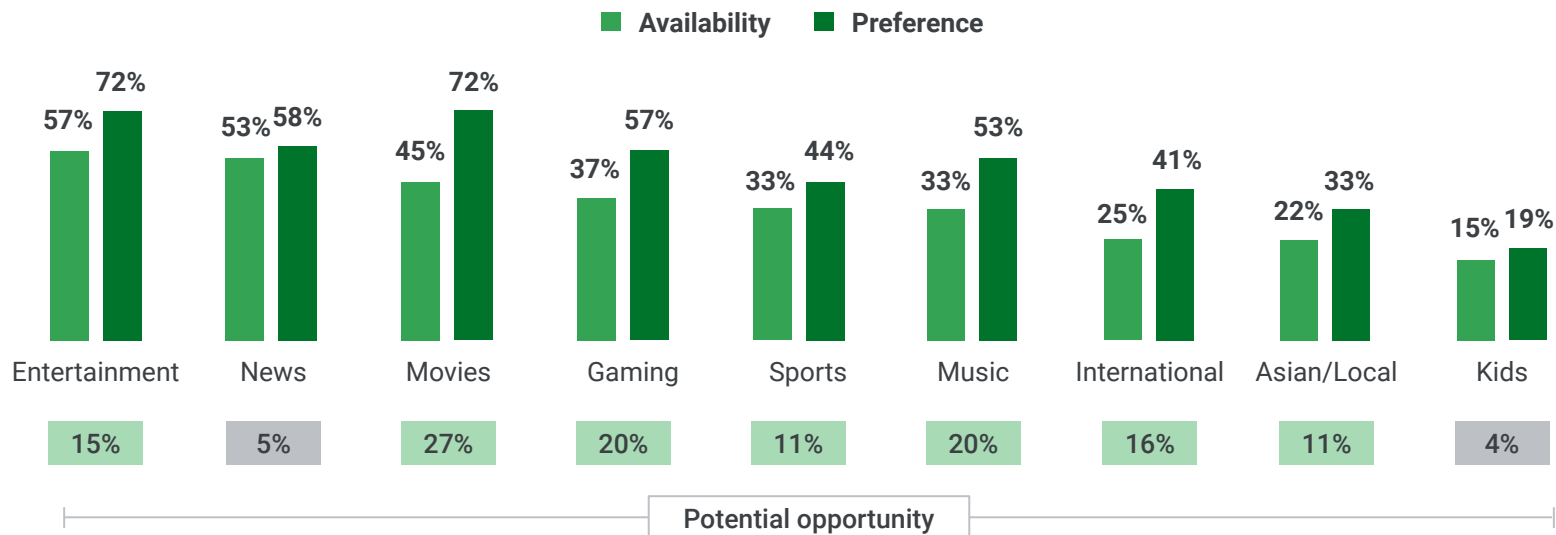
There is a strong preference for singular purpose telco apps where all details can be kept. This underlines the strong trust in telco apps and providers in Thailand.

One in five would prefer multiple apps - this could be due to limited data and storage space.



# Telcos have the opportunity to capture user attention and future usage through entertainment content

## What Content Appeals To Telco App Users?



# As the market becomes saturated with content providers, stretch apps would need to have a differentiated offering.

## Content apps face a saturated market

Telco providers often have supplementary apps for content, but heavy content consumers tend to **prefer trendy and popular** digital streaming services like Netflix and Spotify. They perceive that the telco apps, **not being specialized providers, does not offer unique or exciting content.**

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“ What they do is not that attractive. For example, if they said that their channel is more exclusive, or maybe this is only available at this app, then I think that this is going to be more attractive. because if I can find it elsewhere, then I don't need to watch it here.

- Heavy app users



# App Engagement:

## Key insights and recommendations

### Insights



- App engagement has a strong positive correlation with brand satisfaction and customer retention
  - **66%** of 'most frequent' users are satisfied with the brand
  - **97%** of 'most frequent' users are "quite or very likely" to stay with the brand
- **52% of app users** prefer to engage with telcos via apps - users find Apps are quick, easy and safe. Many have multiple apps installed.
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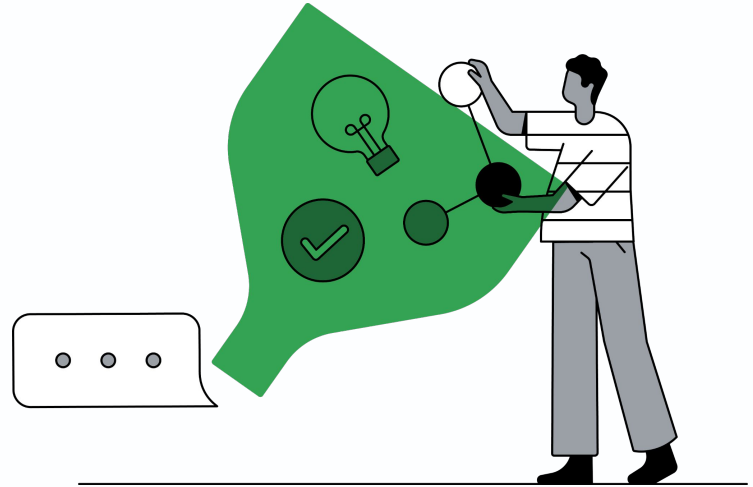
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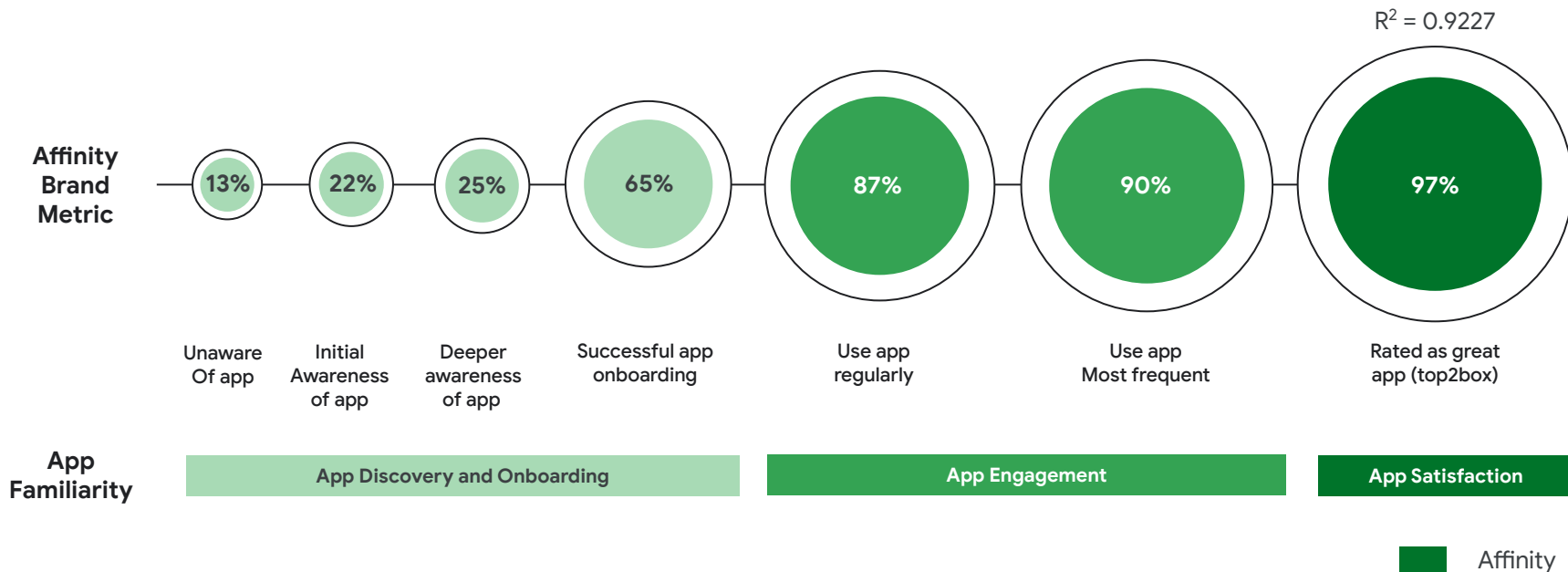
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# App Satisfaction

How satisfied is the user with the app?



# Increasing app satisfaction creates not only strong links to brand affinity...





... but also to brand satisfaction, retention and likelihood to recommend the brand. So how do we increase app satisfaction?

When app users are highly satisfied with the app (9 or 10 out of 10).....

<b>Affinity</b> (among brand users)	<b>Satisfaction</b> (among brand users)	<b>Retention</b> (among brand users)	<b>NPS</b> (among brand users)
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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



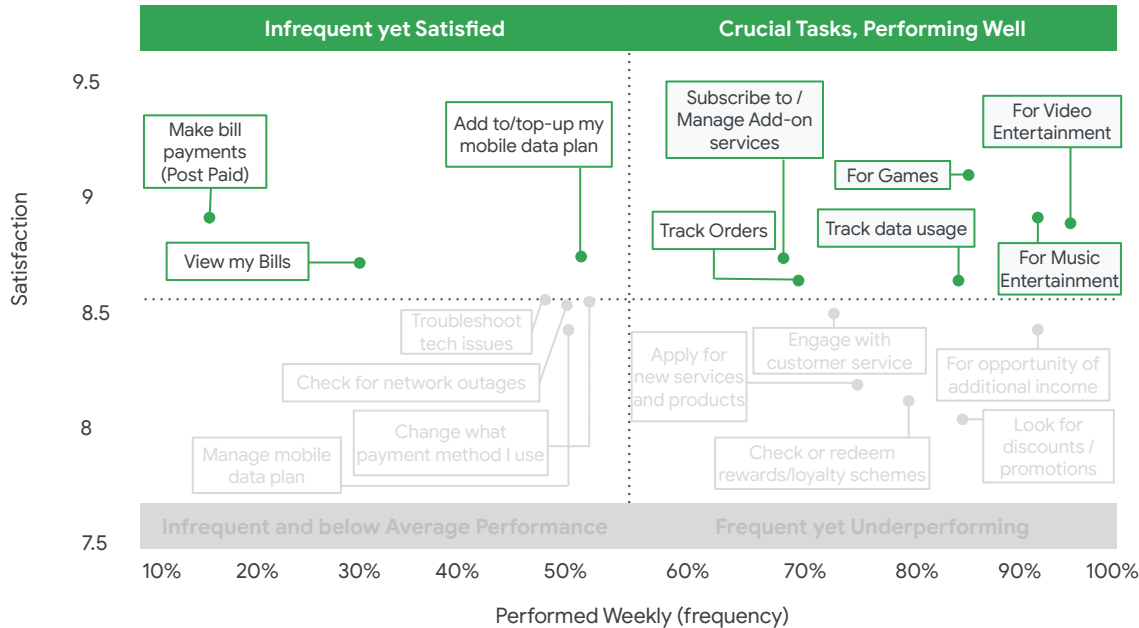
# Safety during the pandemic and convenience are primary motivations for app usage

## Primary Motivations To App Usage

Safety during the pandemic (% strongly agree)		Convenience (% strongly agree)	
They keep me safe during the Covid-19 pandemic as I do not have to go outside	45%	I can use them from anywhere and at anytime	53%
		They are more convenient than going in-store / in-branch	48%
		I like the ability to top-up my mobile data / pay my bills plan through the app	47%
I prefer to use digital payments over cash		40%	
Apps are safer than using cash	38%		



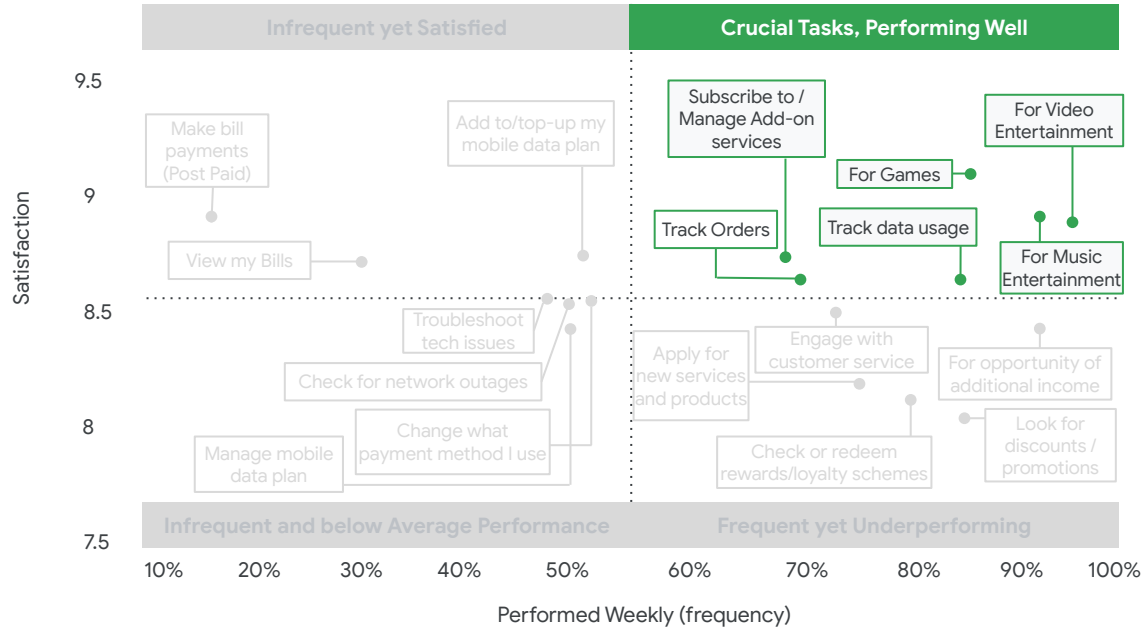
# Critical and regular tasks appear to be eliciting high satisfaction



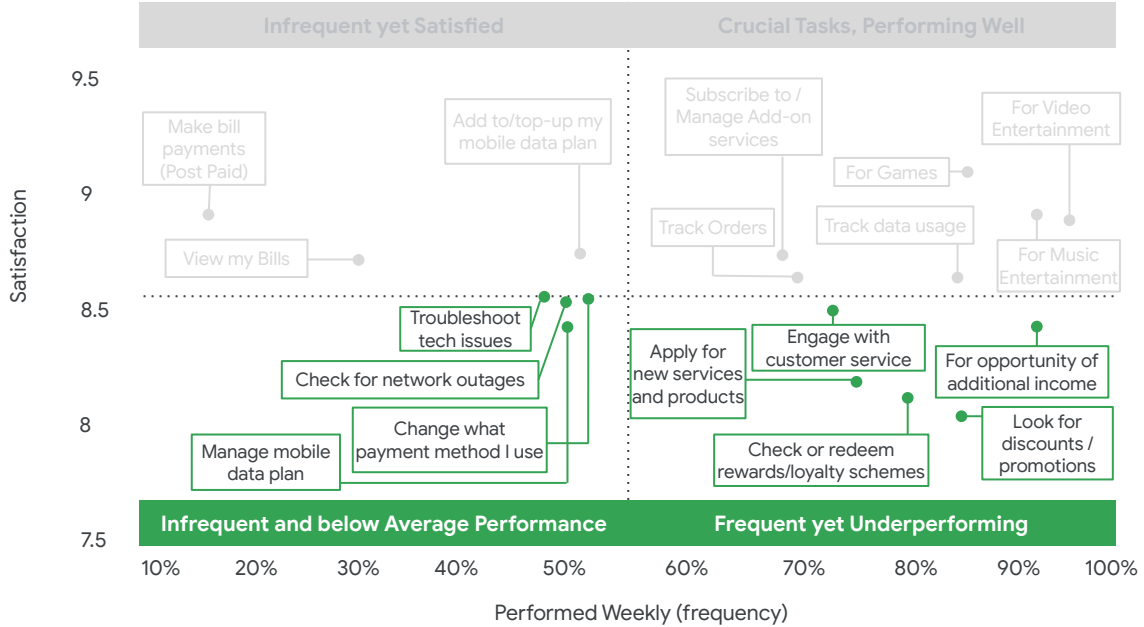
**Frequent Activities x Satisfaction**  
 Apps need to continue to deliver to these critical activities



# Telcos can continue to drive satisfaction in-app by promoting and delivering entertainment value



# Discounts and rewards are popular activities but seem to be under-performing slightly



**Frequent Activities x Satisfaction**

How can these activities be improved?  
And what are the issues?

Is it to do with the functionality or the size of the rewards / discounts?



# A lack of app maintenance will only upset the user base; offer insights into future fixes and updates

## Deletion Top 10

It has bugs / keeps crashing	43%
There were too many ads	35%
It takes up too much memory on my smartphone	30%
It's too difficult to use	30%
I don't use it enough	29%
It seemed to be draining my battery	25%
I changed telco provider	23%
I had security and/or privacy concerns	23%
It was using too much data from my mobile data plan	22%
It gives too many push notifications	22%

Unsurprisingly, app users will lose patience with apps that deliver a poor and frustrating performance. Updates need to regularly fix bugs and improve features to keep app users happy and frequently using apps.

Another key concern is app data and memory usage. As data can be expensive and there is limited smartphone storage, users will always consider this factor.

1 in 4 users delete telco app for privacy/ security concerns. As customers sensitive data increasingly stored online, data security and privacy should be priority, as well as clearly communicating this to them for reassurance

Telco app deletion is rare as app users will be linked to apps by their provider - but they still need to hit expectations or brand equity will suffer

**53%**  
do not delete  
telco apps

**22%**  
delete telco apps  
less often than every  
few months

# Telcos should continue to innovate their offerings towards safety, point rewards, and other modes of access (i.e. voice)

## Gamification

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Customers are expecting more from their loyalty and reward programs. There is a willingness to participate in extra activities to amass these points, and telco providers can see this as an exciting opportunity to work towards...

- “Using points to **exchange for products** and not just discounts”
- “**Playing games for points** that can be used to add money to the phone”
- “Recommendation menu/answering evaluation survey to **collect points that can be used to exchange** for product”



# Telcos should continue to innovate their offerings towards safety, point rewards, and other modes of access (i.e. voice)



## Digital safety

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Serving customers online means protecting details and finances from any threat. As more users come online, either by choice or force due to Covid, people are expecting better security procedures in place

- “Finger **scan**”
- “**Safety** for the customers”
- “Comprehension and **security of personal information**”
- “**Proficient security system** that prevents information leakage and hacking”





# Telcos should continue to innovate their offerings towards safety, point rewards, and other modes of access (i.e. voice)

## Voice Control

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Voice assistants are becoming more popular in society, and there is a growing appetite for integration into apps. There is an opportunity to be at the forefront of innovation presuming it can work with high security.

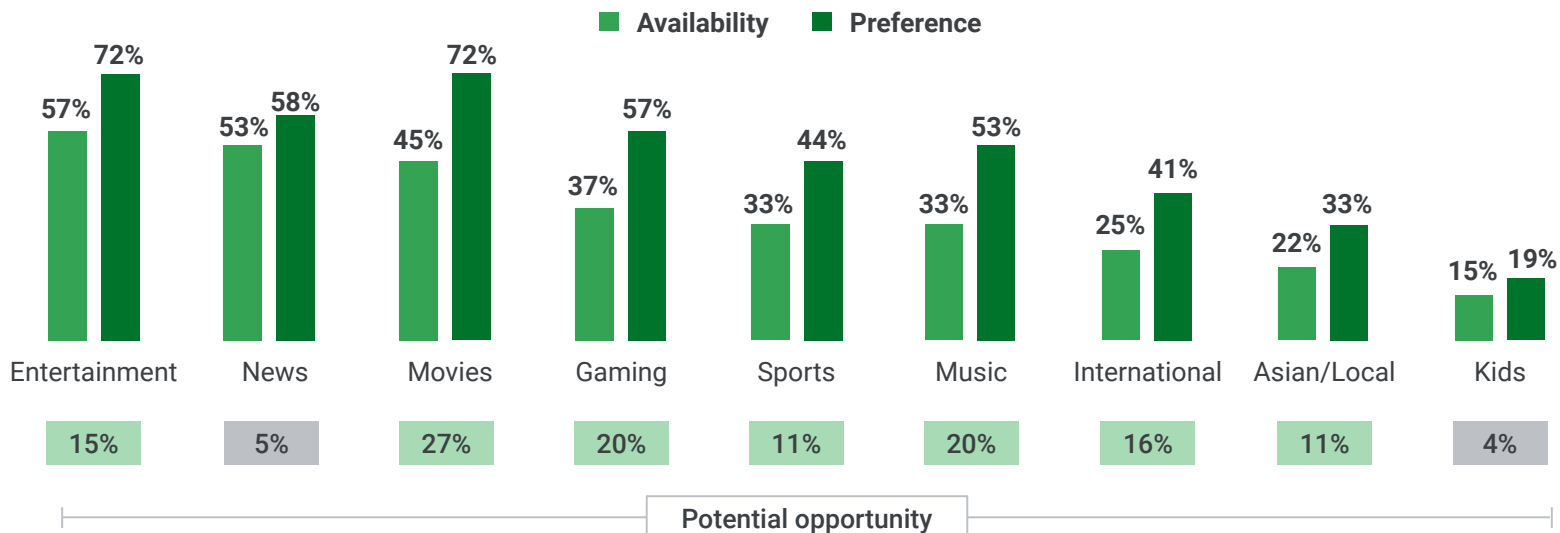
Voice can transcend literacy so the challenge will be in understanding how/what people ask for (e.g. transactions vs. payments). There is a need to link to real language, not financial/telco jargon

- “Voice control. **No need to press anything.**”
- “**Voice** control”
- “Making **a call with voice** control”



# Telcos have the opportunity to capture user attention and future usage through entertainment content

## What Content Appeals To Telco App Users?



# Consumers long for a super-app that consolidates lifestyle services, entertainment content and services

## A superapp that can become a lifestyle partner

Telcos already have **capabilities across different areas** - particularly payments, lifestyle, and entertainment; often in separate apps. Consumers would prefer them to be **combined to offer maximum convenience** and more opportunities to earn rewards. There is also opportunity to **expand more into financial services**.

“ I want it all to be in one app, but not too complicated, and I don't have to tap too much to find what I want. They should partner with everybody and make it convenient, with gaming and movies.

- Heavy app users

## Become a one-stop content hub and curator

The telco app already manages their data access. There is potential for it to **manage their content subscriptions** and streamline payments through one account. This is also an opportunity for the telco to curate content, **directing recommendations** towards its own content apps.

“ It's easier to watch movies on a telco app than to find movies on Google to watch online. When I go to Google I need to know the specific name of the movie I want to watch. But [Telco App A] has categories so I can browse to easily find what I want to watch.

- Light app user

## Innovate to meet customer service needs

The app can become a **key touchpoint to manage customer services** more effectively through digital means, but needs to improve the **quality of service recommendations** to replace calling the hotline/visiting the telco branch.

“ I don't renew my contract though the app - I contact the call centre as they give better promotions than the app. But if the call center proposal is the same as the app, then I would use the app as it is easier.

- Heavy app user



# App Satisfaction:

## Key insights and recommendations

### Insights



- App satisfaction is strongly correlated with brand recommendation - **97% who positively rate the app regard themselves as brand promoters**
- **79%** 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 - **53% strongly agree they can use apps from anywhere; 48% state they are more convenient than in-branch**
- **36% of telco app users** are **prepaid customers**, with app payments being a growing trend due to ease and convenience

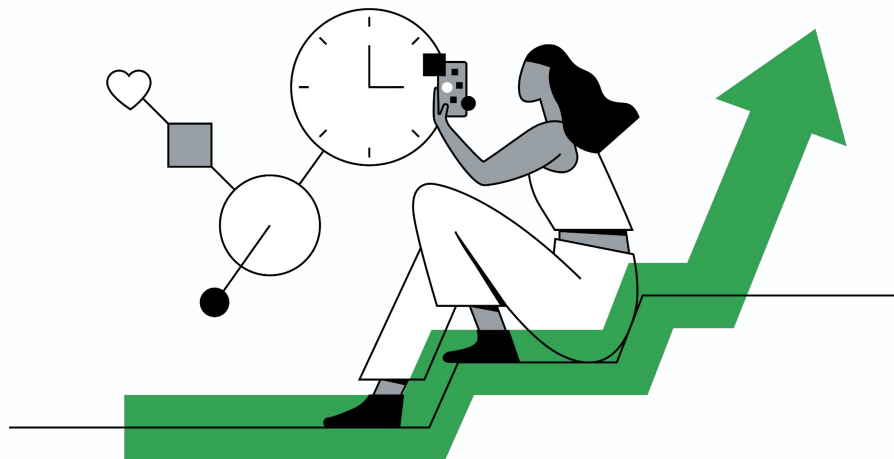
### Recommendations to improve app metrics



- **Get the basics right, consistently**  
Ensure critical tasks (e.g. tracking usage, top ups, bills) are reliable, seamless & elicit high satisfaction. Bugs and poor interfaces quickly put users off.
- **Meet needs of secondary functions**  
Rewards and discounts are popular activities but they seem to be underperforming slightly. Can brands offer more?
- **Understand changing consumer needs**  
Primary reasons for using telco apps include staying safe during the pandemic and digital being safer than cash
- **Innovate to meet consumer needs**  
Entertainment options within telco apps gain very high satisfaction among the groups that use them - an opportunity to upscale these functions (particularly movies and gaming content). Gaming is popular and consumers are looking to monetize this in the future. Voice is also a desired innovation



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Thank you



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