



Mobile digital experience in emerging Asia–Pacific: consumer survey



Martin Scott

About this report

This report provides an analysis of the digital experience of smartphone users in emerging Asia-Pacific (EMAP). It uses consumer survey data to analyse mobile customers' usage of traditional and digital channels for sales and support interactions. It also provides detailed analysis of the impact of self-care apps on customer satisfaction.

The survey was conducted in association with Dynata between August and September 2021. The survey groups were chosen to be representative of the internet-using population in the region. We set quotas on age, gender and geographical spread to that effect. There were at least 1000 respondents per country.

KEY QUESTIONS ANSWERED IN THIS REPORT

- What are the main channels used by different customers to interact with mobile operators? What is the split between traditional and digital channels?
- What are the different combinations of sales and service channels used by consumers and how do these vary by operator and country?
- Which operators have the highest penetration of digital channels such as self-care apps?
- How does the channel mix relate to key customer satisfaction metrics such as Net Promoter Scores (NPSs)?



GEOGRAPHICAL COVERAGE

Emerging Asia-Pacific (EMAP)

- Indonesia
- Malaysia
- Philippines
- Thailand



WHO SHOULD READ THIS REPORT

- Strategy executives and managers who are interested in improving the customer experience within telecoms operators and understanding the drivers of change and the impact of digital experience initiatives on customer satisfaction.
- Market intelligence and research executives in service providers that are responsible for understanding end-user trends and supporting business units in identifying and addressing new opportunities.
- Equipment/device manufacturers and software providers that want to identify end-user trends in service and support, and help their operator customers to improve their ability to address opportunities.

Executive summary

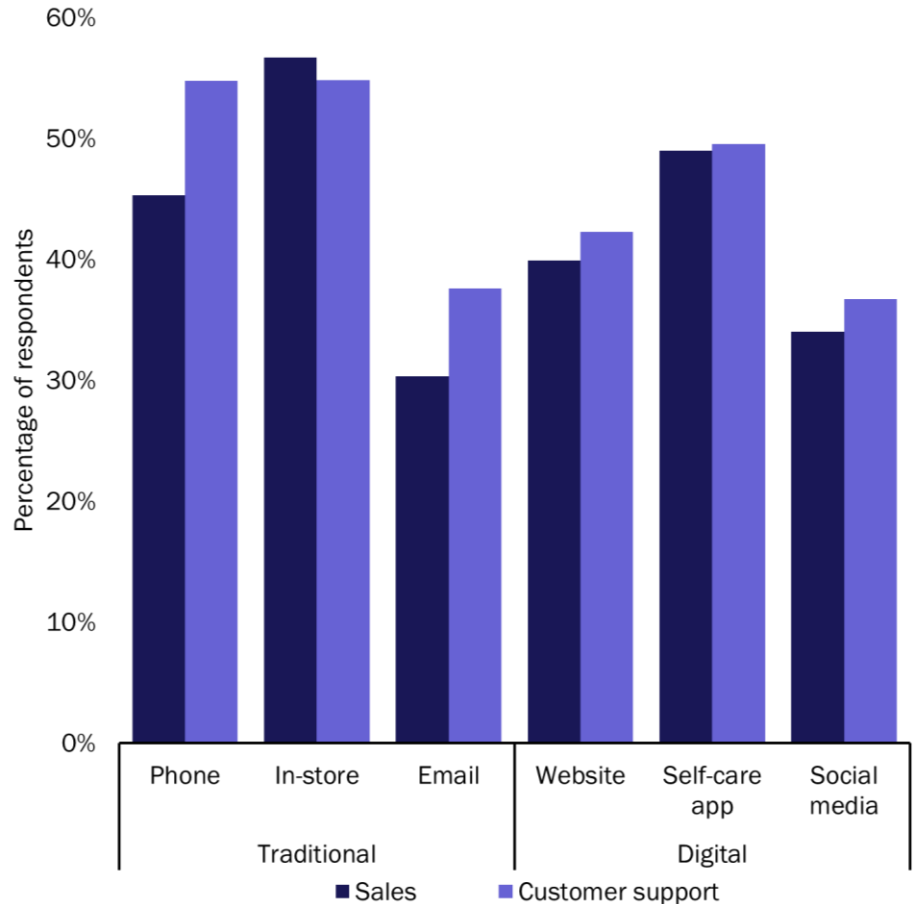
MNOs in emerging Asia-Pacific (EMAP) continue to have some of the most successful digital-channel-led initiatives worldwide.

EMAP is one of the most-advanced regions worldwide in terms of digital engagement for sales and customer service. Digital channels continued to grow in popularity in the second full year of the COVID-19 pandemic (by between 4 percentage points (pp) and 7pp). Physical stores continued to be the most popular option for sales and support, but the penetration of this channel fell between 2020 and 2021, most likely due to the severity of the COVID-19 outbreaks in Malaysia and the Philippines during fieldwork. Self-care apps are the second-most-used sales channel for the second year running. This suggests that the behavioural changes that occurred at the start of the pandemic have remained, though the support for an increased number of payment options has further driven app engagement.

The penetration of self-care apps varies by both country and operator. The narrative is generally one of growth, but there are notable exceptions where the centralisation of services into a single app has not run smoothly (as for Maxis, for example).

Regression analysis highlights a strong correlation between satisfaction with self-care apps and willingness to recommend (and thus NPS). Customers' attitudes to operators' self-care apps is an important predictor of NPS when taking other important variables such as price satisfaction and customer service satisfaction into consideration.

Figure 1: Communication with a mobile service provider for sales and customer support, by channel, EMAP, 2021¹



Source: Analysys Mason

¹ Please refer to the methodology and panel information section for the sample size and relevant survey questions.



Executive summary

Analysis

Methodology and panel information

About the author and Analysys Mason

About the author



Martin Scott (Principal Analyst) heads Analysys Mason's research initiatives related to media and TV. He manages the *Video, Gaming and Entertainment* research programme. Martin has held numerous positions within Analysys Mason during the last 16 years, including heading the company's Consumer Services, Data and Regional Markets practices. He also launched Analysys Mason's *Connected Consumer Survey* series of research. His primary areas of specialisation include telecoms TV strategy, OTT video and media, consumer behaviour, customer satisfaction and consumer-facing marketing strategy. He also specialises in statistics, surveys and the analysis of primary research.

We are experts in the telecoms, media and technology sector



Strategy

- Corporate growth strategy
- Business unit strategy
- Infrastructure strategy



Transformation

- Business transformation
- Digitalisation
- Operational excellence
- Data, BI, steering and insights
- Change and programme management
- Sustainability



Transaction support

- Commercial due diligence and market review
- Technical due diligence
- Post-merger integration
- Periodical business monitoring and loan technical advisory
- Opportunity scouting and pre-deal support



Regulation and policy



- Network and platform
- Public sector broadband intervention
- Accelerating digital transformation of society
- Price controls and cost modelling
- Regulatory accounting
- Regulatory benchmarking and analysis
- Spectrum management and policy
- Expert witness and litigation support
- Postal regulation and policy





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- DataHub and Regional Markets
- Consumer Services
- Operator Business Services and IoT Applications
- SMB IT Channels and Forecasts
- Cloud Networks

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 - Wireless Infrastructure Strategies
 - Fibre Infrastructure Strategies
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 - Customer Engagement
 - Monetisation Platforms
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 - European Telecoms Market Matrix
 - European Country Reports
- 
DataHub
 - ~2800 forecast and 280+ historical metrics
 - Regional results and worldwide totals
 - Operator historical data

Our areas of expertise



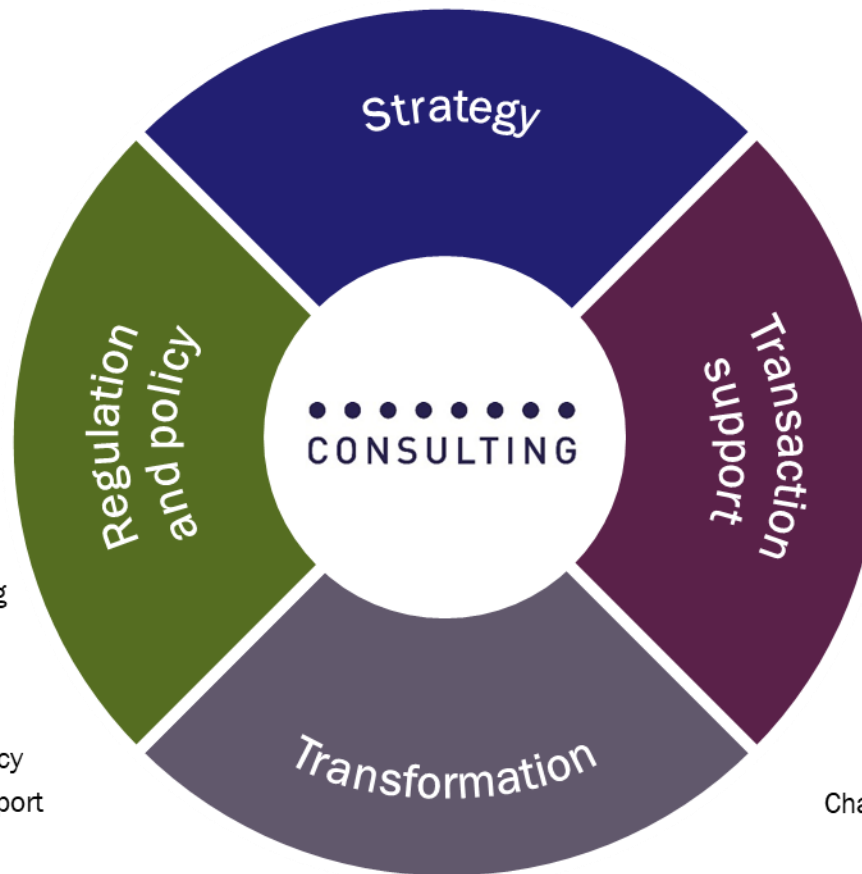
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