



# Connected Consumer Survey 2018: mobile services and devices in emerging Asia- Pacific



Rémy Pascal

## About this report

This report focuses on aspects of Analysys Mason's *Connected Consumer Survey* that relate to the behaviour, preferences and plans of mobile users in emerging Asia-Pacific (EMAP). In particular, it focuses on respondents' usage of mobile services and devices.

The survey was conducted in association with On Device Research between September and October 2018. The survey groups were chosen to be representative of the mobile-internet-using population in the region. We set quotas on age, gender and geographical spread to that effect. Each country had a minimum of 1000 respondents, and 5000 in the region.

### KEY QUESTIONS ANSWERED IN THIS REPORT

- How well do operators perform as smartphone sales channels, and how does their performance relate to consumers' choice of tariffs?
- What role does the handset play in customer retention and acquisition?
- What impact does 4G have on mobile users' spend and engagement with their smartphones?
- What is the effect of 4G on customer satisfaction?
- What is the relationship between data usage and spend?
- What is the level of awareness of 5G technology, and to what extent are customers interested in the new use cases planned for 5G?

### GEOGRAPHICAL COVERAGE

#### Emerging Asia-Pacific

- Indonesia
- Malaysia
- Philippines
- Thailand
- Vietnam

### WHO SHOULD READ THIS REPORT

- Operator-based strategy executives and marketing managers who are interested in understanding consumer market trends and the role of operators as smartphone distribution channels.
- 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 device usage and help their operator customers to improve their ability to address market opportunities.

## Executive summary

**In EMAP, the key factors that influence mobile customer satisfaction and choice of operator are price, speed and data allowance size. As data usage increases, operators must ensure that customers get enough value for money.**

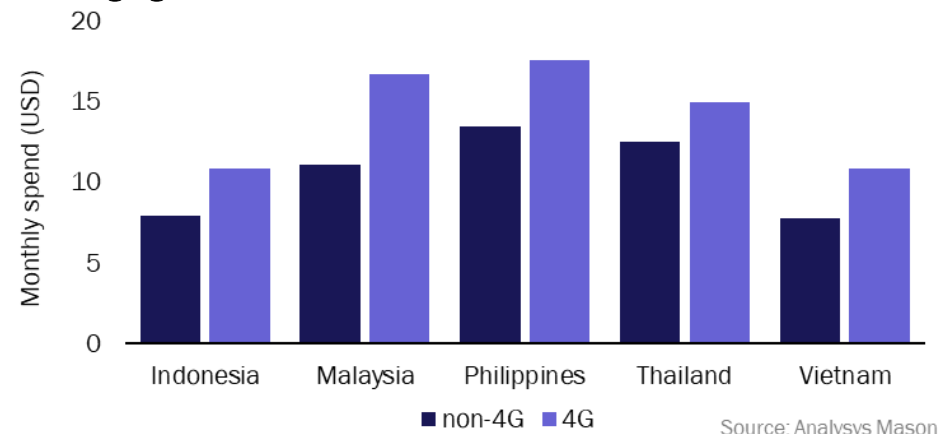
The results of our survey in EMAP show that handset availability still plays a role in customers' satisfaction and decision-making, but it is not as important as factors such as data allowances and price. The cycle of device replacement has also slowed because of increased prices and the lack of innovation in handset design.

In terms of technology, operators continue to upgrade customers to 4G and this migration has resulted in a number of benefits including higher spending, higher satisfaction and lower intention to churn. We also asked respondents in EMAP about their 5G awareness, which was comparable with levels observed in other countries that we surveyed around the world. Customers also said that they were more interested in the enhancements that 5G can bring to existing services (such as 'superfast browsing speeds' and 'high-resolution video anywhere') rather than new use cases.

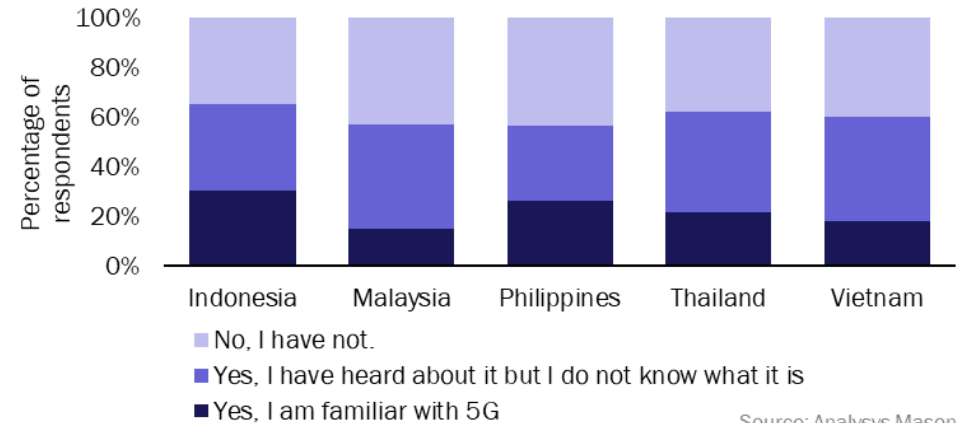
Data usage penetration and the size of data allowances in EMAP have both increased. Overall, higher data allowances tend to be associated with higher Net Promoter Scores (NPSs), but this is not linear and will also depend on the value perceived by consumers in each tier. Operators should tailor packages to customers' needs because we have observed that customers with too much or not enough data to play with were more likely to churn.

<sup>1</sup> Please refer to the appendix for sample size and relevant survey questions.

**Figure 1: Average monthly mobile service spend and spending uplift for 4G users compared to non-4G users by country, emerging Asia-Pacific, 2018**



**Figure 2: 5G awareness by country, emerging Asia-Pacific, 2018<sup>1</sup>**



Source: Analysys Mason



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4G, 5G and value-added services

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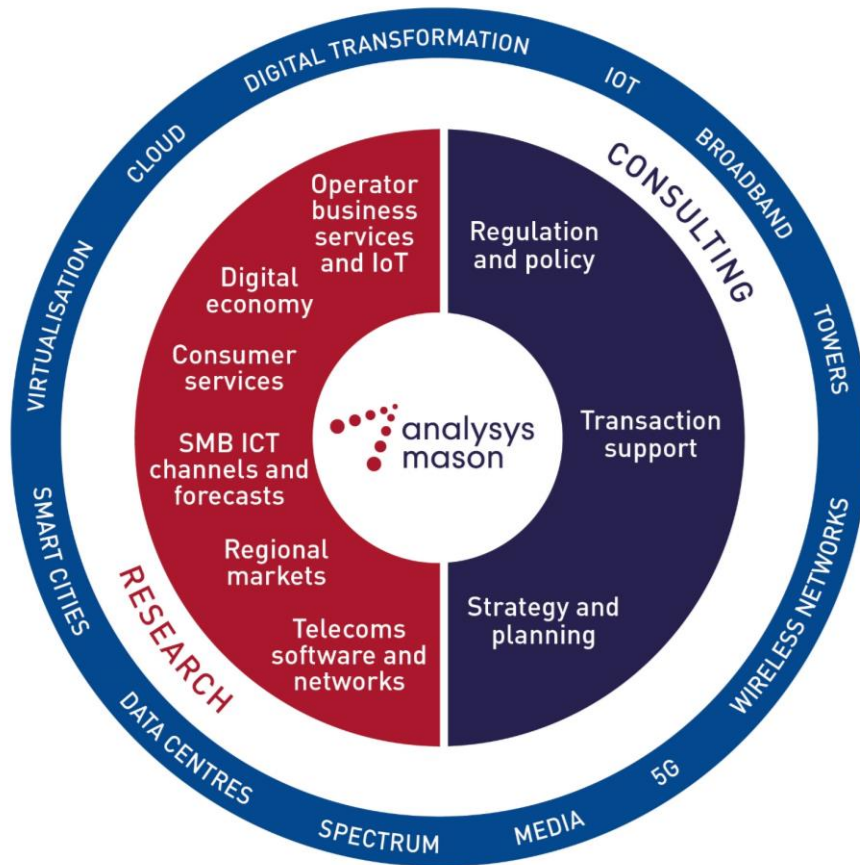
## About the author



**Rémy Pascal** (Senior Analyst) joined Analysys Mason's Asia-Pacific research team in August 2018 and is based in the Singapore office. He also contributes to other research programmes including those in the Consumer Services research practice. Rémy has more than 8 years of experience in the telecoms and ICT sectors. Before joining Analysys Mason, Rémy worked in various market intelligence positions at Samsung Electronics' Networks Business in South Korea, Orange in France and the French Trade Commission in South Korea and Taiwan. Rémy holds a master's degree in management from Rouen Business School in France.

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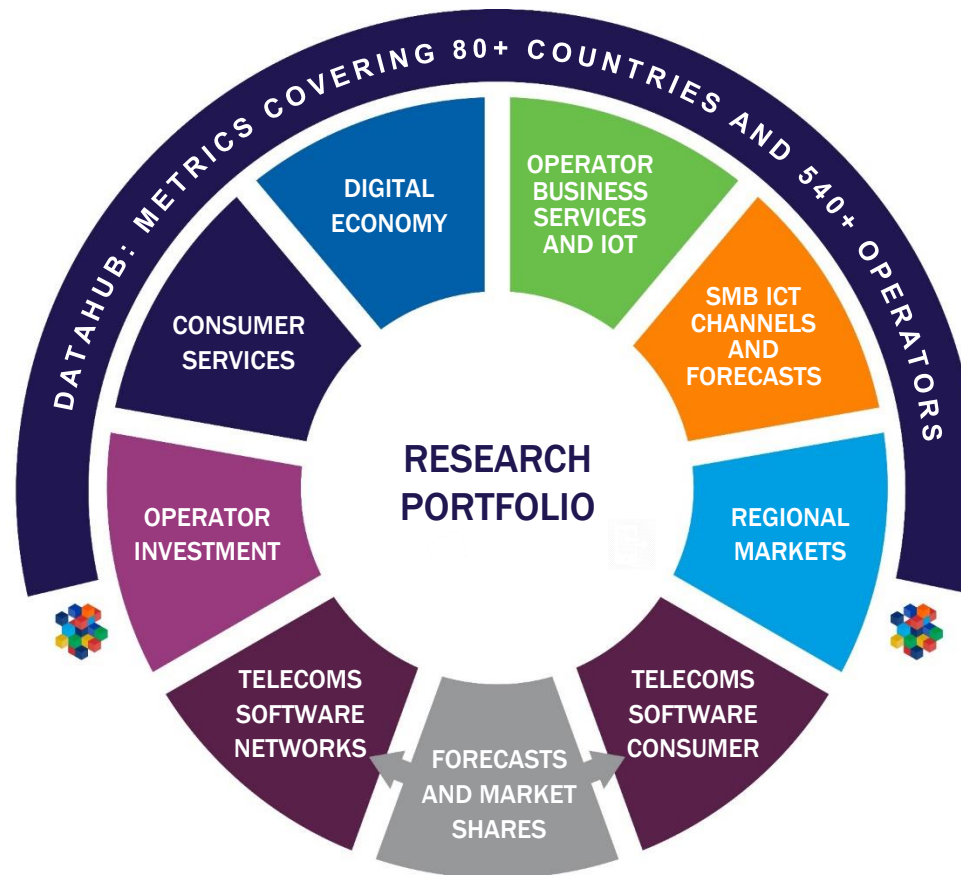
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Asia-Pacific  
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**PUBLISHED BY ANALYSYS MASON LIMITED IN MAY 2019**

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