App-nesia in the UK

The need for app re-engagement marketing

Ipsos, March 2015

Google

Background

In our mobile-first world, brands know it's key to build an app and offer a fantastic user experience. A great app should encourage brand interaction and keep customers coming back.

But what about when they stop coming back…

This research looks to explore how common it is to forget about installed apps, how keen people are to re-engage with these apps, and how brands might go about achieving this re-engagement.

App-nesia in the UK

Key findings: forgotten apps

- **One in five apps** across travel, retails and restaurants are forgotten
- Remembered and forgotten apps are downloaded for similar reasons; brands have an opportunity to remind people about the relevance of their app using a variety of techniques beyond push notifications, including search advertising
- 47% prefer to use an app when they want information quickly (compared to 17% who prefer a mobile site)
- The most common driver to use an app again is talking to friends or families about apps
- The most likely apps to be forgotten are travel and holiday apps

Snapshot of app behaviour

With high search frequency and a fairly high forgetting rate, app re-engagement solutions seem most relevant to Shopping.

	Restaurant/ Takeaways	Travel	Shopping
% of smartphone users with any apps (from offline enumeration study)	15%	33%	32%
% with any apps in vertical that search in that vertical via mobile at least once a month	80%	56%	92%
Average number of apps installed	2.07	2.74	2.90
1 app only installed	47%	38%	20%
2-3 apps installed	40%	35%	52%
4-5 apps installed	11%	15%	20%
6+ apps installed	3%	11%	9%
Average number of forgotten apps	0.36	0.91	0.52
% of apps installed that have been forgotten	17%	33%	18%

Source: Q1A. How frequently would you say you conduct searches via a search engine on your phone for [CATEGORY]?/ Q1. Which of the following types of app do you have installed on your smartphone?/Q2_APP RECALL. Which [CATEGORY] apps do you have installed on your smartphone? […] without looking at your smartphone. / Are there any [CATEGORY] apps that you had previously missed from the list? Base: All respondents (n=394; n=334; n=413).

Those with travel and holiday apps are the most likely to forget at least one app in the category

		Restaurants & Takeaways (A)	Travel & Holiday (B)	Shopping (C)
% **forgetting at least one app**		23%	49% (A,C)	31% (A)
		A/B/C Significant higher at 95% confidence level		
% with **1 app only** in the category (inc forgotten)		47% (B, C)	38% (C)	20%
Average number of apps in the category (inc forgotten)		2.1	2.7 (A)	2.9 (A, B)
% Search for the category	**Daily**	9%	8%	25% (A, B)
	Weekly	30%	18%	50%

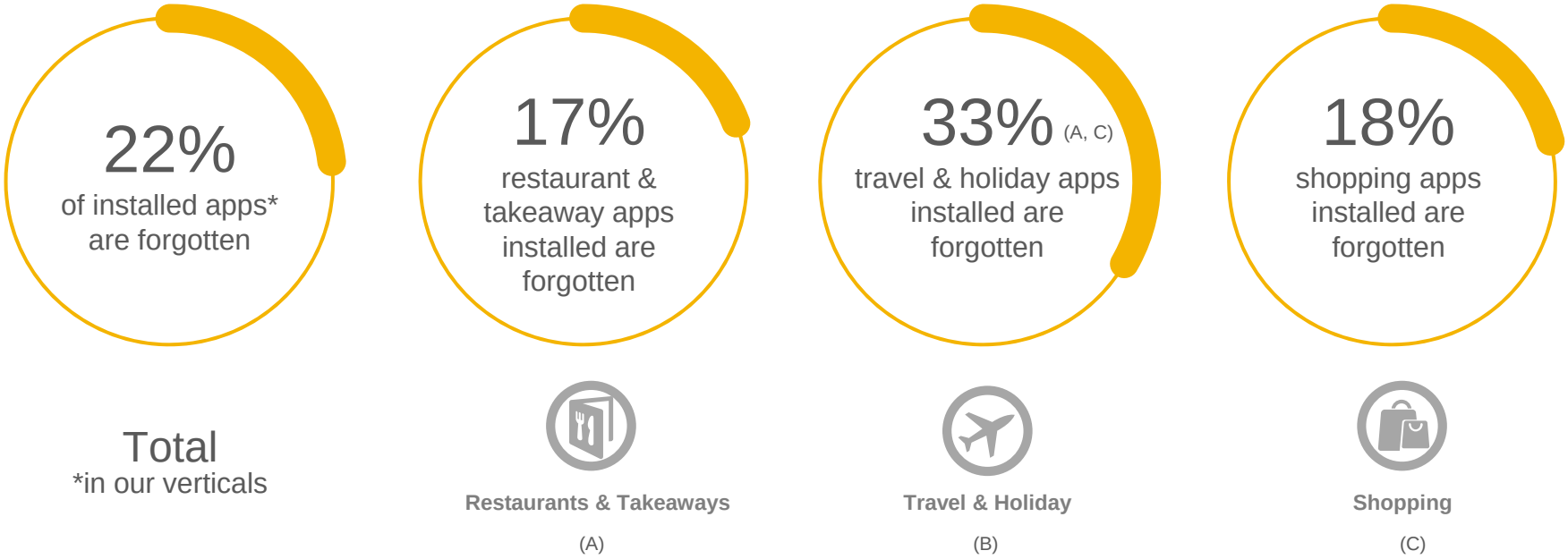
Google App –nesia in the UK
Source: Ipsos

Source: Q3_APP CHECK. Are there any [CATEGORY] apps that you had previously missed from the list? / Q2_APP RECALL. Which [CATEGORY] apps do you have installed on your smartphone? […] without looking at your smartphone. / Q1A_SEARCH FREQUENCY. How frequently would you say you conduct searches via a search engine on your phone for [CATEGORY]? Base: All respondents (n=394; n=334; n=413)

Google

There's a higher rate of forgetting amongst travel & holiday apps

Forgotten app share (% of installed apps that have been forgotten)



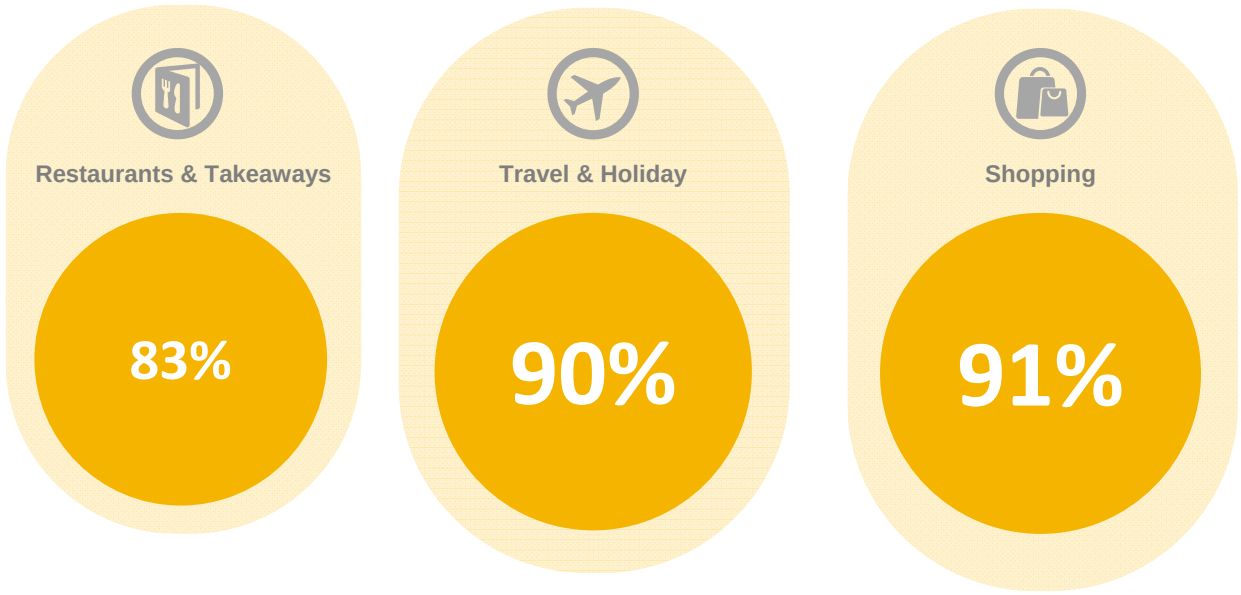
A/B/C Significant higher at 95% confidence level

9 in 10 of those who have forgotten Travel & Holiday and Shopping apps would be open to use them again

Likelihood to use the forgotten app/apps in the future*

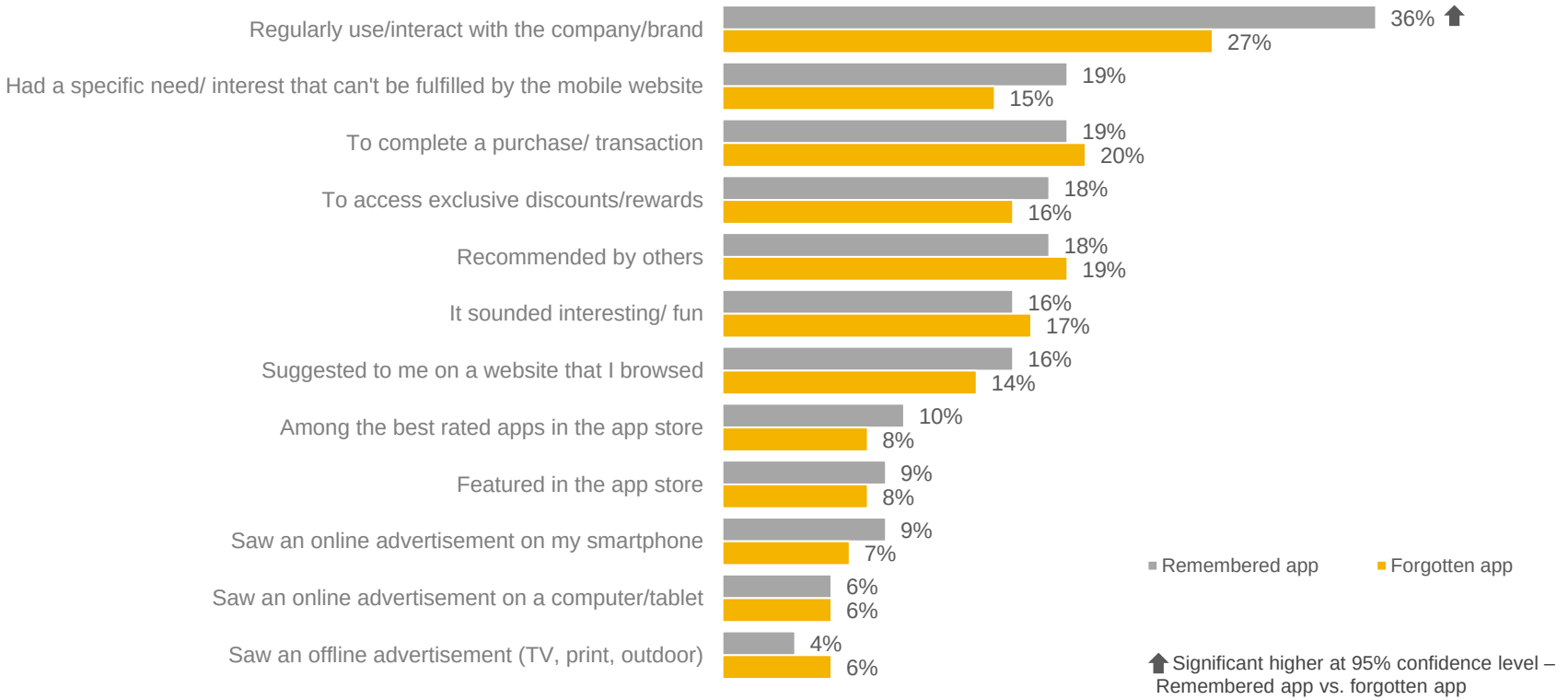
Non-rejectors

(Net Definitely/Probably/ Might or might not)



Remembered and forgotten apps are downloaded for similar reasons, though people can think of more reasons for having downloaded remembered apps

Reasons for downloading the app – remembered app vs. forgotten app



Motivations for download differ according to category: restaurant apps are more about getting discount / rewards, Travel about recommendations, while Shopping is about brand interaction

Reasons for downloading the forgotten app

Restaurants & Takeaways

To access exclusive discounts/rewards	34%
Regularly use/interact with the company/brand	28%
Recommended by others	26%
To complete a purchase/ transaction	21%
Suggested to me on a website that I browsed	20%

Travel & Holiday

Recommended by others	21%
Had a specific need/ interest that can't be fulfilled by the mobile website	18%
It sounded interesting/ fun	17%
Regularly use/interact with the company/brand	12%
To complete a purchase/ transaction	8%

Shopping

Regularly use/interact with the company/brand	44%
To complete a purchase/ transaction	34%
To access exclusive discounts/rewards	17%
Suggested to me on a website that I browsed	16%
It sounded interesting/ fun	14%

Source: Q7 For which of the following reasons did you originally download any [category] app? Base: All those forgetting any app in the category (n=119; n=159; n=164).

Re-engaging app users

Key findings: re-engaging with apps

Objective: To understand reactions to the Google re-engagement concept

Strong interest in being **directed to a pre-installed app** in mobile **search results**, especially among those who've forgotten apps .

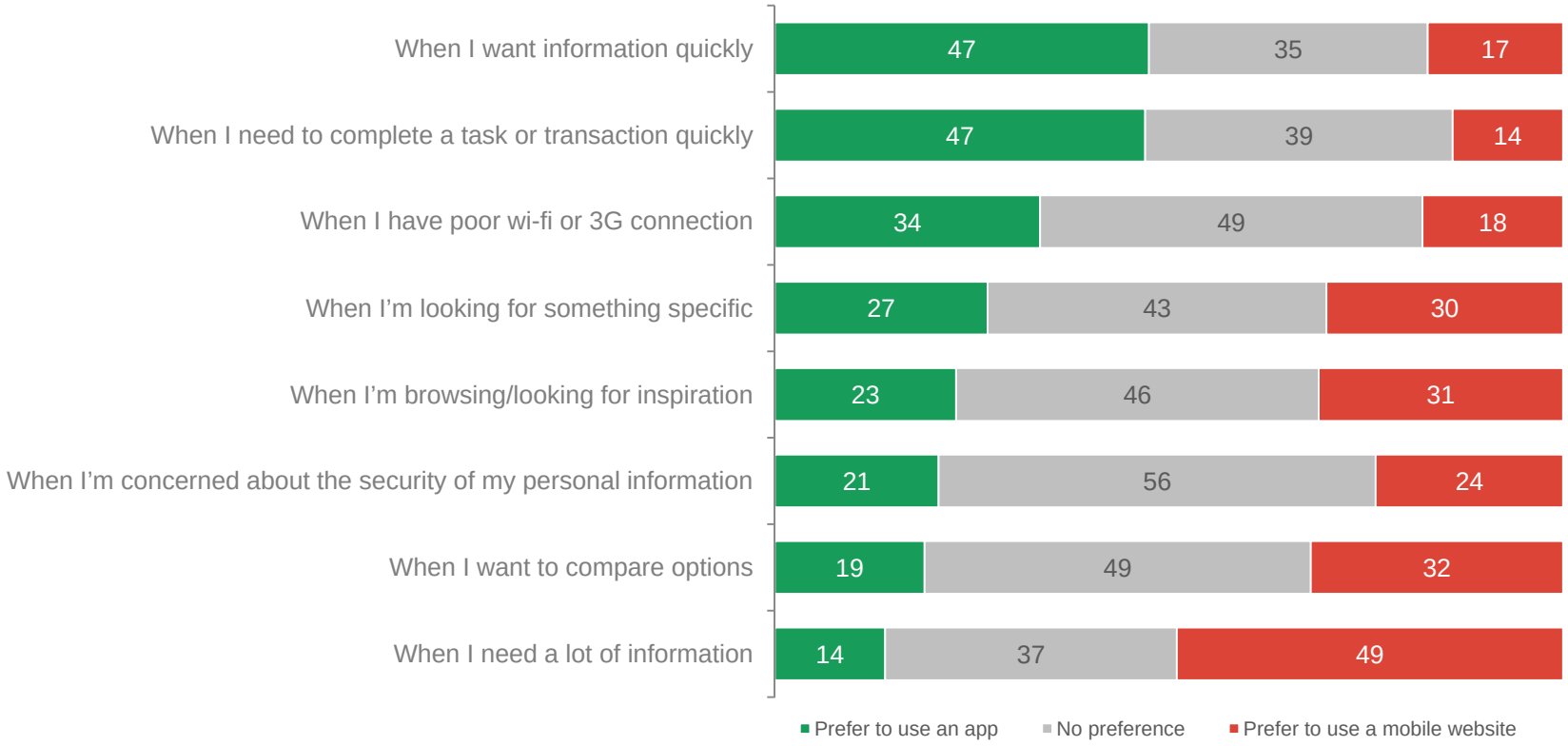
An app is perceived as **simpler, quicker and more personalised** and useful for **quicker, more transactional** tasks

During category specific search behaviours, **nearly half of participants** said that they would **prefer a link to an app** and just over a third said they would prefer a link to a mobile website

A mobile website is seen as more **in-depth** and would be used to **compare options or for information gathering**

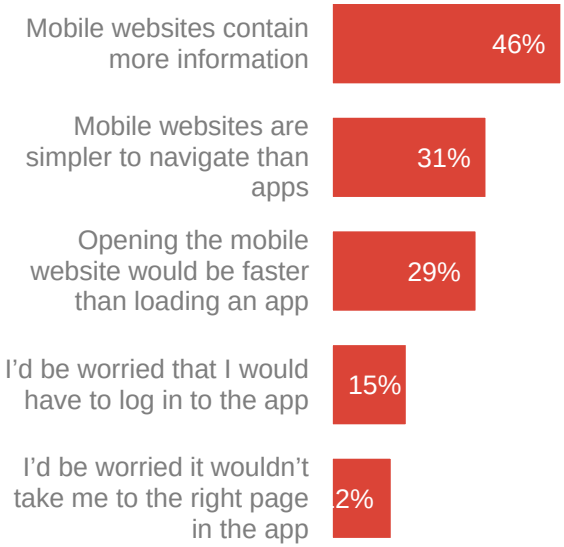
Apps are generally preferred for speed and a better user experience, while mobile websites are preferred if more in-depth information is required

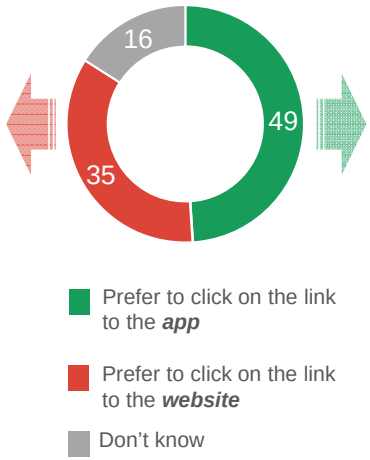
Situations when preferring the app vs. mobile website (%)



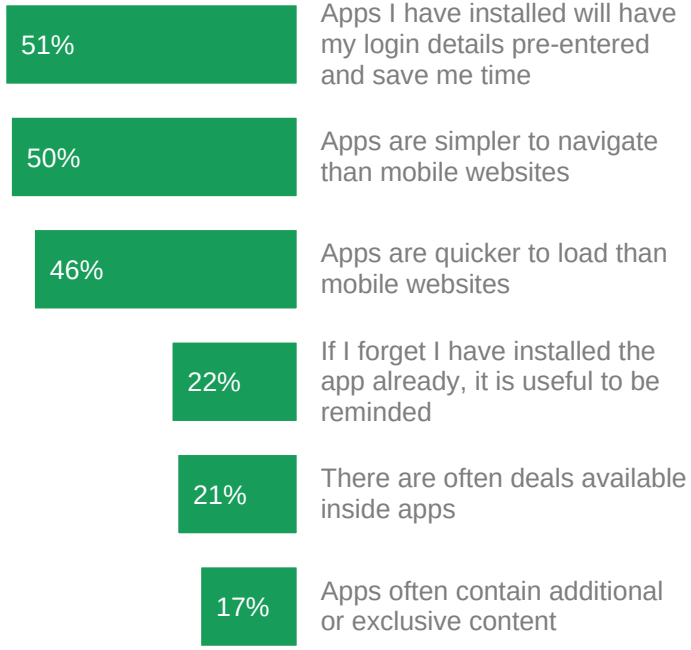
Those preferring the app find it simpler/quicker, while the website provides more in-depth information

Reasons for preferring the **mobile website (%)**





Reasons for preferring **the app (%)**



1. Source: Q8NEW Which would you prefer to click on? Base: All respondents (n=1141) / Q9 Why would you prefer to click on the link to the company's app (instead of the mobile website)? / Base: All those preferring the app (n=561) / Q10 Why would you prefer to click on the link to the company's mobile website (instead of the app)? / Base: All those preferring the website (n=401)

Appendix

Methodology

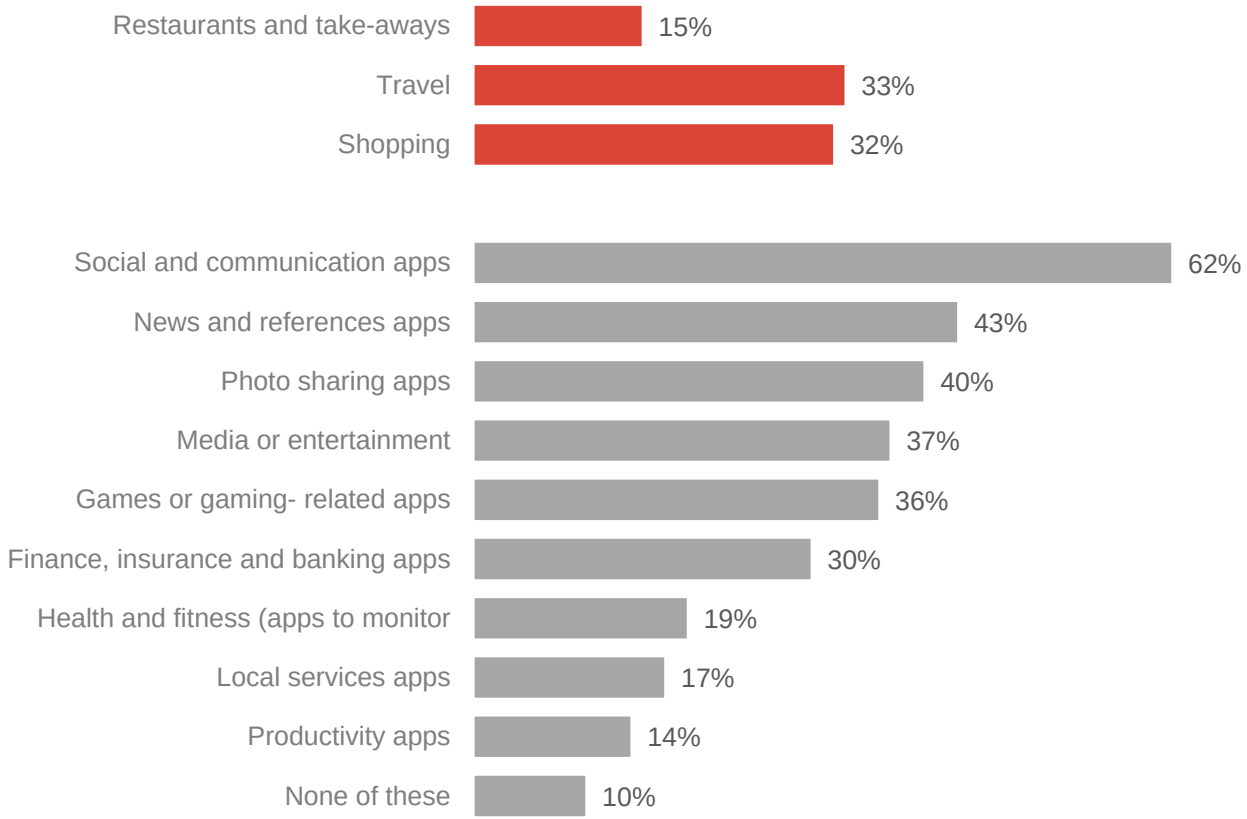
A quantitative online survey run in the UK using the Ipsos online panel :

1. An **offline omnibus** survey was conducted amongst a nationally representative sample of the full adult population (1,950 interviews). This provided the online survey quotas and weighting targets to provide a representative sample of smartphone users aged 16 and over within each vertical. Each vertical is made up of **smartphone users having at least one app** within the app category.

2. **~400 online interviews** were administered in each of the three app verticals (Restaurants & Takeaways, Travel & Holiday and Shopping) with quotas and weighting applied from the offline omnibus to make **each app category representative** by mobile OS, age, gender and working status.

3. Online **fieldwork was conducted** between13th - 30th January 2015.

Incidence of app categories amongst smartphone users (Source: offline enumeration study)



Weighting schemes from the offline enumeration study

400

online interviews

were administered in each of the three app verticals (Restaurants & Takeaways, Travel & Holiday and Shopping) with quotas and weighting applied from the offline omnibus to make each app category representative by mobile OS, age, gender and working status.

	Smartphone users with at least 1 app in Restaurants & Takeaways (n~400)	**Smartphone users with at least 1 app in Travel & Holiday** (n~400)	**Smartphone users with at least 1 app in Shopping** (n~400)
	15% of all smartphone users	33% of all smartphone users	32% of all smartphone users
16-24 with Android	13%	6%	9%
25-34 with Android	7%	9%	11%
35-44 with Android	7%	6%	6%
45-54 with Android	6%	9%	9%
55-64 with Android	6%	7%	5%
65+ with Android	2%	3%	1%
16-24 with iOS	17%	12%	18%
25-34 with iOS	19%	18%	14%
35-44 with iOS	9%	12%	14%
45-54 with iOS	8%	11%	9%
55-64 with iOS	4%	6%	2%
65+ with iOS	2%	1%	2%
Males with Android	24%	20%	17%
Females with Android	17%	20%	24%
Males with iOS	28%	30%	24%
Females with iOS	31%	30%	35%
Daily internet users with Android	37%	35%	37%
Less-than-daily Internet users with Android	2%	4%	4%
Daily internet users with iOS	59%	58%	56%
Less-than-daily Internet users with iOS	2%	3%	3%
Employed with Android	25%	27%	27%
Self-employed with Android	2%	2%	2%
Other with Android	14%	10%	12%
Employed with iOS	41%	42%	40%
Self-employed with iOS	2%	4%	2%
Other with iOS	16%	15%	17%