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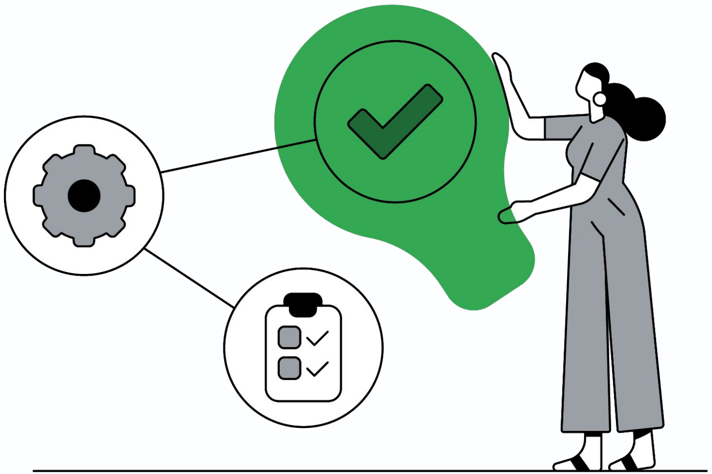
Apps: How to realize their full value

Telco, Pakistan

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=1,083 for Pakistan Quantitative (Telco, n=377) with 2 playgroups (n=4, each) per vertical for Qualitative. Research covered 4 brands and their respective 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 heavy app users
- Light telco users: Use telco apps 1-3x a month and conducts 4 different app activities
- Heavy telco users: Use telco apps at least once a week and conduct 4 different app activities

*Jazz World, My Telenor, My Zong, My Ufone

Who are generally using telco apps?

Profiling

Gender

57% Male | **43%** Female

Age

73% (18-34) | **27%** (35-64)

Income

Below Rs.40,000	**16%**
Rs.40,001 - Rs.60,000	**27%**
Rs.60,001 - Rs.80,000	**21%**
Rs.80,001 - Rs.100,000	**7%**
Rs.100,001 or more	**3%**

Internet Usage

96% Daily

Operating System

1% iOS | **99%** Android

Connected Devices

Smartphone	**100%**
Tablet	**5%**
Laptop computer	**9%**
Desktop computer	**3%**
Smart speaker	**0%**

Region

70% Metro | **30%** Non-Metro

Smartphone Storage

Under 16 GB	**4%**
16 GB	**15%**
32 GB	**36%**
64 GB	**27%**
128 GB	**14%**
Over 128 GB	**1%**

Prepaid v/s Postpaid

Top up online	**40%**
Top up in-store	**54%**
Contract/Fixed bills	**6%**

What insights did the research aim to uncover?

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

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

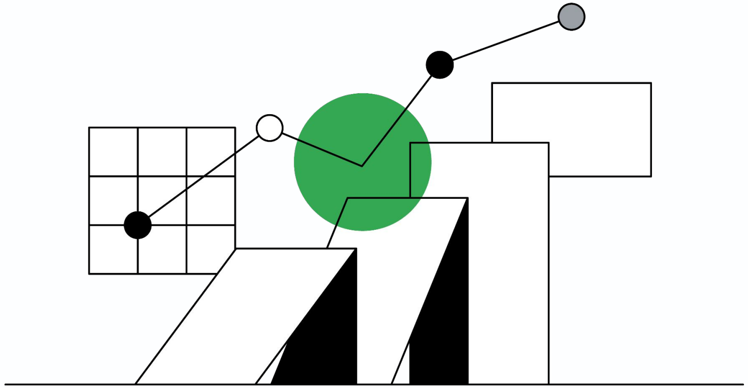
03 What is the link between an ‘effective’ app and business outcomes?

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?

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)”

App Discovery and Onboarding:
Key insights and recommendations

Insights

- **Nearly 100%** of telco brand's customers are **aware of telco apps in Pakistan**
- Over 95% of recent customers (used the brand in the last 3 months) of Telco brands are also **using the brand apps** - and avg. 5% have **trialled and deleted**
- App discovery is a starting link to building brand affinity **45% of successful onboarders have strong affinity**
- **22%** of App users have installed at least one telco app but never used
- Nearly all app users are pre-paid customers **(94%)** with a strong preference for app top-ups **(77%)** - which will continue into the future due to convenience and recommendations

Recommendations to improve brand metrics

- **Focus less on app discovery stage of app journey**
  Awareness & usage is very high so time is more wisely spent on increasing engagement
- **Encourage any further installation through** regularly used and influential touchpoints. Eg app stores, search advertising
- **Encourage any further installation by promoting** influential yet underutilized touchpoints. Eg. online reviews, including website advertising in media mixes
- **Focus more on improving trial**
  Key reasons why app users do not try apps after install are: they don't understand what the app provides (30%); needing help (20%). Could further education (e.g. online tutorials) help overcome these perceived complexities as we know many are moving to digital as a result of Covid. Continue to promote the convenience and safety of utilizing in-app payments - especially for those who are newer to digital

App Engagement:
Key insights and recommendations

Insights

- App engagement has a strong positive correlation with brand satisfaction and customer retention
  - **72%** of 'most frequent' users are satisfied with the brand
  - **94%** of 'most frequent' users are likely to stay with the brand
- **88%** of app users prefer to engage with telcos via apps - apps are quick, easy and safe
- **72%** of app users state they prefer to use apps for critical tasks such as **viewing bills and tracking data** as well as secondary functions such as redeeming rewards, discounts and video entertainment
- App users are encouraged to continue usage when apps are proven **to take up less memory (32%), sends useful notifications (31%), uses less mobile data (29%) and is recommended (28%)**

Recommendations to improve brand metrics

- **Upkeep core features that bring app users back**
  E.g. viewing bills (36% perform regularly), track data (31%), top-up plans (31%), manage plans (29%)
- **Maximize opportunity areas around rewards and discounts**
  Telco apps are becoming increasingly popular for discounts (65% perform regularly) and redeeming rewards (19%)
- **Raise awareness of underutilized yet helpful features**
  Assuming they work well, underutilized entertainment features such as video (20% perform regularly), music (17%) and gaming (18%) can help increase the value of an app to users
- **Ensure notifications are hyper-relevant**
  Consumers enjoy useful notifications - could this be a way of reminding about top-ups when data is low - or promoting entertainment options

App Satisfaction:
Key insights and recommendations

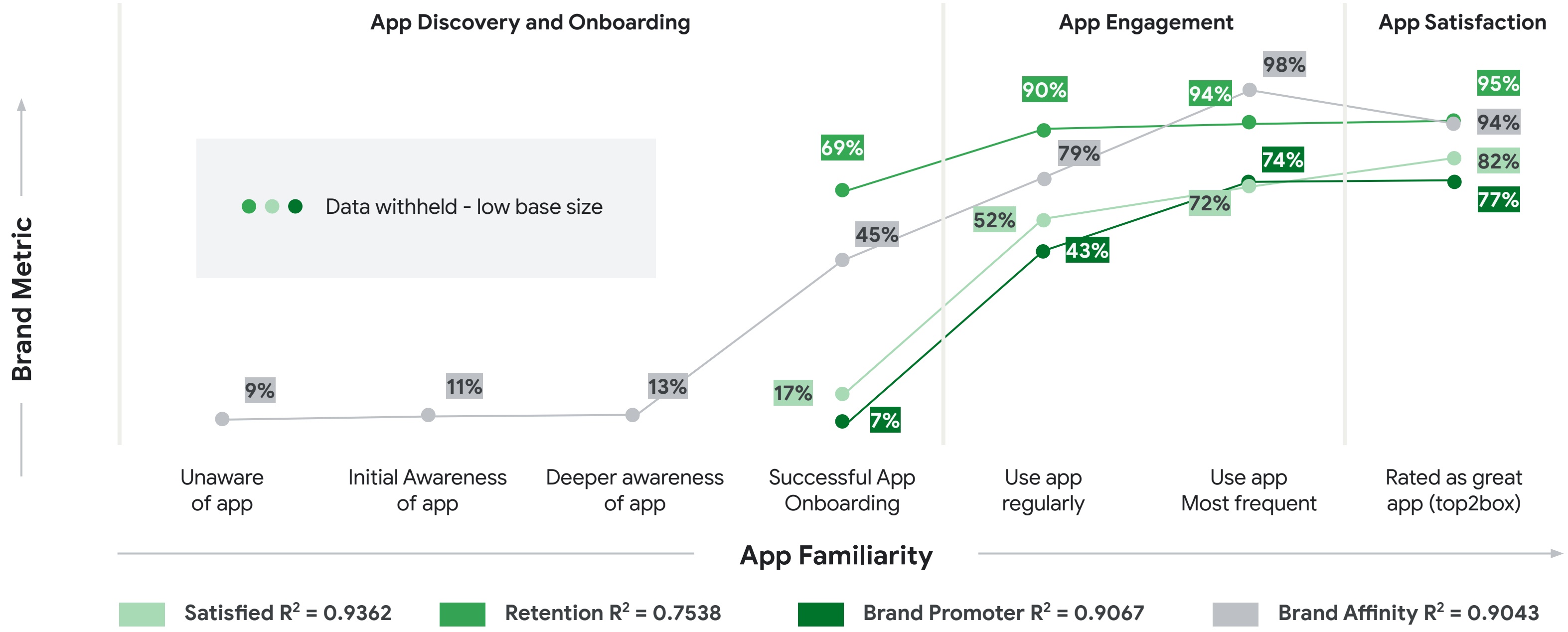
Insights

- App satisfaction is strongly correlated with brand recommendation - **77% who positively rate an app regard themselves as brand promoters**
- **66%** 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 safety and convenience - **41% strongly agree apps are safer than cash, 40% strongly agree apps are more convenient than going in-store; 39% strongly agree they can use apps anywhere, anytime**

Recommendations to improve brand metrics

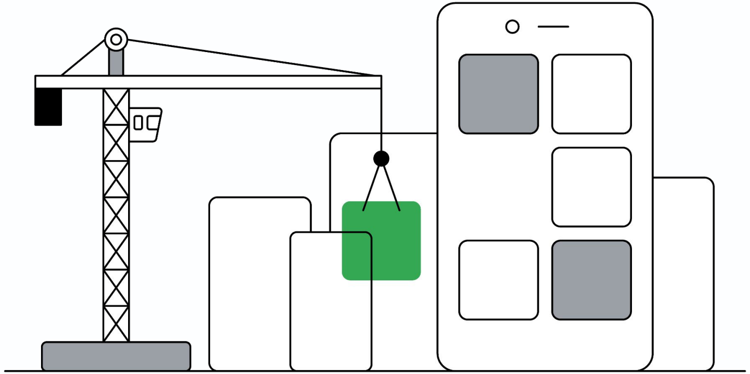
- **Get the basics right, consistently**
  Ensure critical tasks (e.g. managing plans, tracking data) are reliable, seamless & elicit high satisfaction. Poor interfaces and disruptions quickly put users off. Ensure all functionality is available in one app
- **Promote other activities eliciting satisfaction**
  Telco users are very happy with discounts, and entertainment options within apps - they should be promoted further
- **Innovate to meet consumer needs**
  Whether they are current or new users, Covid has had an explicit impact on Telco app usage. People are appreciative of the safety and convenience of apps, but some may struggle financially or miss connecting with friends and family due to poor internet connectivity. Telco users are **asking for a variety in packages that offer levels of flexibility**, as well as features that can operate offline

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

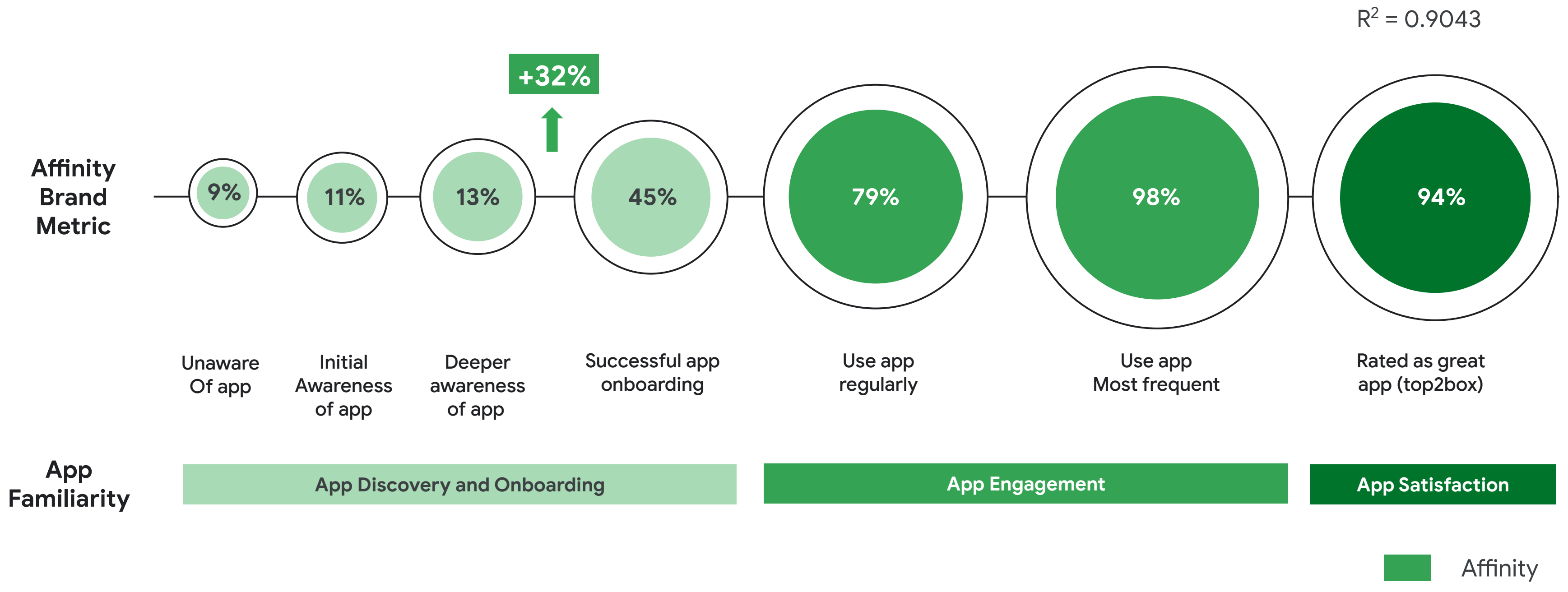


App Discovery and Onboarding

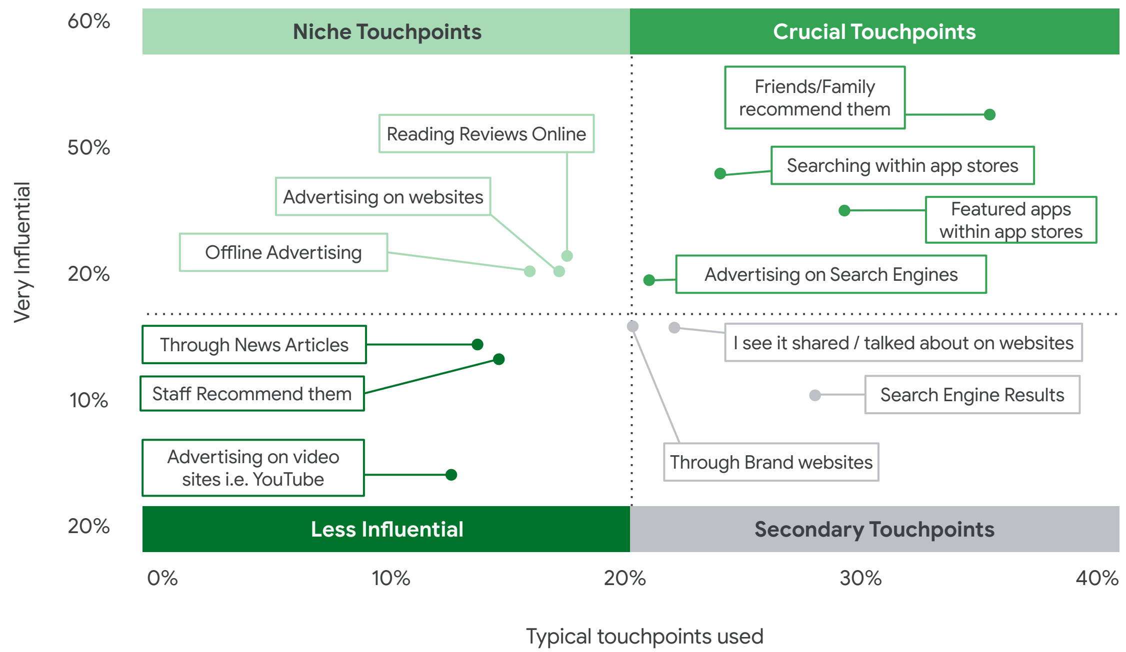
How does onboarding of an app impact brand metrics?



A successful app journey correlates with positive brand affinity (with strong shifts seen at onboarding and regular use)



App stores and offline word of mouth compliment each other when telco app users look for new alternatives



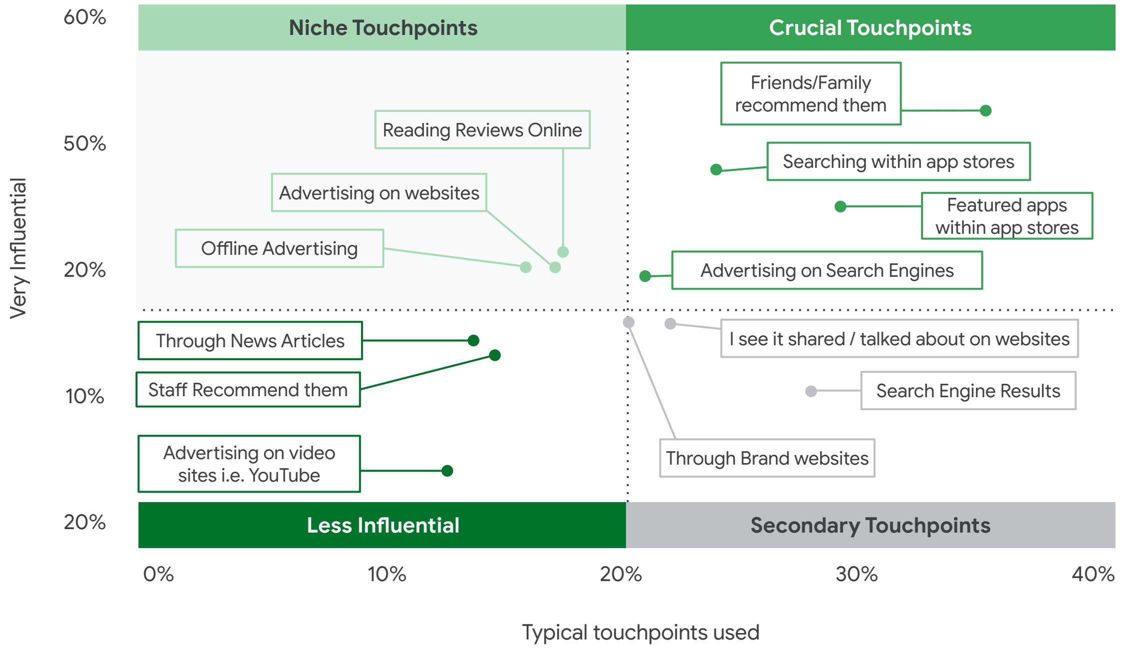
Crucial Touchpoints

Touchpoints that are frequently used and influential in installation decision making

Online	Offline
Searching within app stores	Family / friends recommend them
Featured apps within app stores	
Advertising on search engines	

Source: CJ5. How do you typically find out about new <PIPE DUMMY CODE FROM S6a> apps? CJ6. How influential are these in persuading you to install a <PIPE DUMMY CODE FROM S6a> app? Total Sample = 377

Online reviews and advertising (both online and offline) has value in influencing new users, and could be utilized further



Opportunity / Invest Touchpoints

Touchpoints not frequently used yet are influential in installation decision making

Online	Offline
Reading reviews online Advertising on websites	Offline advertising

Source: CJ5. How do you typically find out about new <PIPE DUMMY CODE FROM S6a> apps? CJ6. How influential are these in persuading you to install a <PIPE DUMMY CODE FROM S6a> app? Total Sample = 377

Recommendation from peers gets consumers started

Peer recommendations drive awareness

Pakistani consumers are primarily reliant on friends/family to **recommend the app and teach them how to use it**. To a lesser extent, they also get this information from the telco and from advertisements (e.g. Facebook, YouTube)

“ It was my brother who had [Telco A] app, that’s how I learnt about it, I used to think that [Telco B] should have this option. So I saw an ad while watching cricket, and it said that this is an app that I can use, and I downloaded it.

- Male app user

Low awareness of supplementary apps

Most consumers were not aware of supplementary telco apps for content/entertainment (e.g. PTCL Smart TV, JazzTV, etc), and **get their content needs from free sources like YouTube**

Thought starter:

Social/community influence remains most important, but can be supplemented by ads and video demos. Drive adoption and buzz with the help of social campaigns, reward consumers for referrals.

Covid has pushed new users towards apps, but they need to meet expectations in terms of functionality

Installation Triggers (Top 10)

It is from a well known brand	39%
It had features that looked useful	30%
I wanted to be able to top-up my account easily	27%
It is a safer option during Covid-19	25%
I wanted to change the way I make payments due to Covid-19	25%
I needed help tracking my data	24%
Everyone uses this app / I was recommended to use it	24%
They are from my current telco	24%
They offer personalised offers and incentives	20%
I was forced to download apps due to lockdown	19%

Brand promotion stems heavily from word of mouth - people have enjoyed their experience with the app, and have been more open to demonstrate the effectiveness to others. Apps that target unmet needs prove their use.

Covid is having an impact on downloads as a result of lockdowns and cautious behavior. Apps need to deliver to all users in these unprecedented times:

- new users need an easy introduction to telco apps
- current users could expand their activity repertoire
- families may benefit from budgeting tools and discounts

Satisfaction levels suggest apps are meeting user needs but this needs to continue for telcos to become the norm post-Covid.

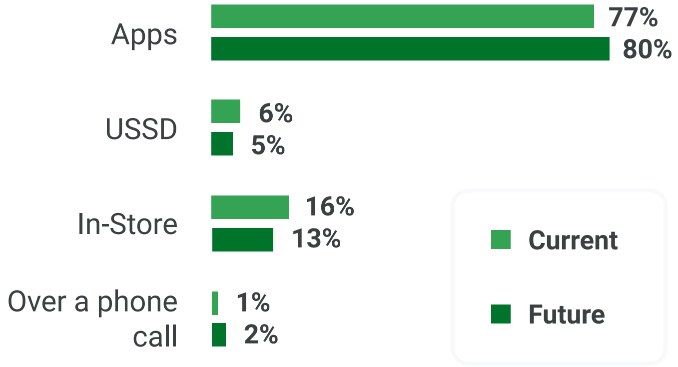
Data management has become even more important due to Covid, so app users are expecting features that can alleviate stress around knowing remaining data and how best to pay for more

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 = 377

There's preference among pre-paid telco users to renew their credit via apps ...

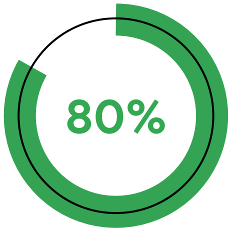
of telco app users are paying for their smartphone services through prepaid means

Preferred Method For Paying Prepaid Service

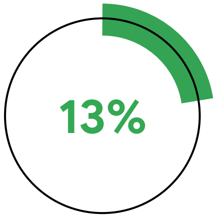


TELCO1. When you currently update your pre-paid mobile service (e.g. top-up / checking data), what is your preferred method?
TELCO3. Thinking into the future, what do you think will be your preferred method of updating your pre-paid mobile service?
Sample - those who top-up smartphone data in advance online or in-store = 355

… heavily influenced by convenience



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



of prepaid users are intending to go **in-store** as their preferred payment in the future

Reasons For Choosing Telco Apps

It is the most convenient option for me	67%
It is my current method and I prefer to keep it the same	36%
I've been recommended to update my service via apps	29%
I think it will be easier to manage my plan	25%
I'm unsure of how to update my service in a different way	17%

Reasons For Choosing In-store

It is the most convenient option for me	76%
It is my current method and I prefer to keep it the same	33%
I want to be able to speak in-person to a professional	17%
I think it will be easier to manage my plan	17%
I'm unsure of how to update my service in a different way	11%

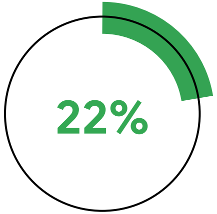
Source: TELCO6. Why will you look to update your pre-paid mobile service via apps in the future? Sample - those who top-up smartphone data in advance online or in-store & intend to use apps in the future = 285; those who top-up smartphone data in advance online or in-store & intend to go in-store in the future = 46

Some apps, however, would be left unused due to perceived complexities

New users need brands to help address the unknown and set-up processes

Reasons to install but not use

I don't understand what the app provides me	30%
I use a different app instead	23%
It is too risky to sign up to new products during Covid-19	21%
I need someone to help me / teach me more	20%
I haven't had the time	18%
The app design or user experience is complicated	17%
The sign up process looks complex	7%



have installed at least one telco app but never used

Less tech-savvy face onboarding challenges

While most consumers are able to onboard on their own, those who tend to be less technologically savvy face challenges and **require help in installing, registration, and learning to use the app**

> “ Steps and procedures should be on Play Store. If I didn’t have someone to help me, maybe I won’t know how to use it.
>
> **- Female app user**

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 = 377, Have installed apps but not used = 82

App Discovery and Onboarding:
Key insights and recommendations

Insights

- **Nearly 100%** of telco brand's customers are **aware of telco apps in Pakistan**
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- App discovery is a starting link to building brand affinity **45% of successful onboarders have strong affinity**
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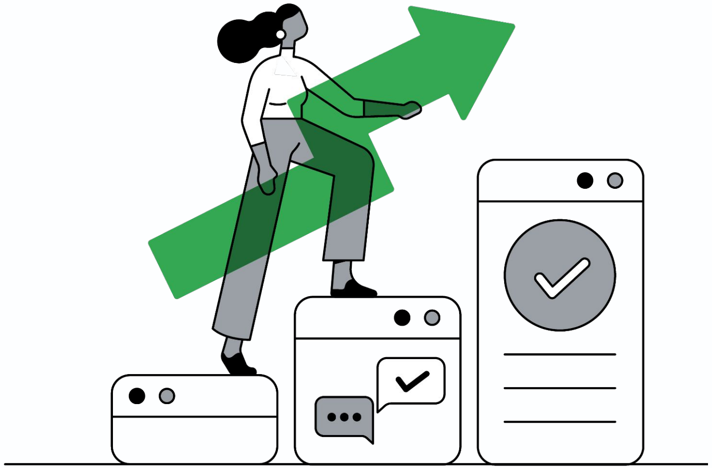
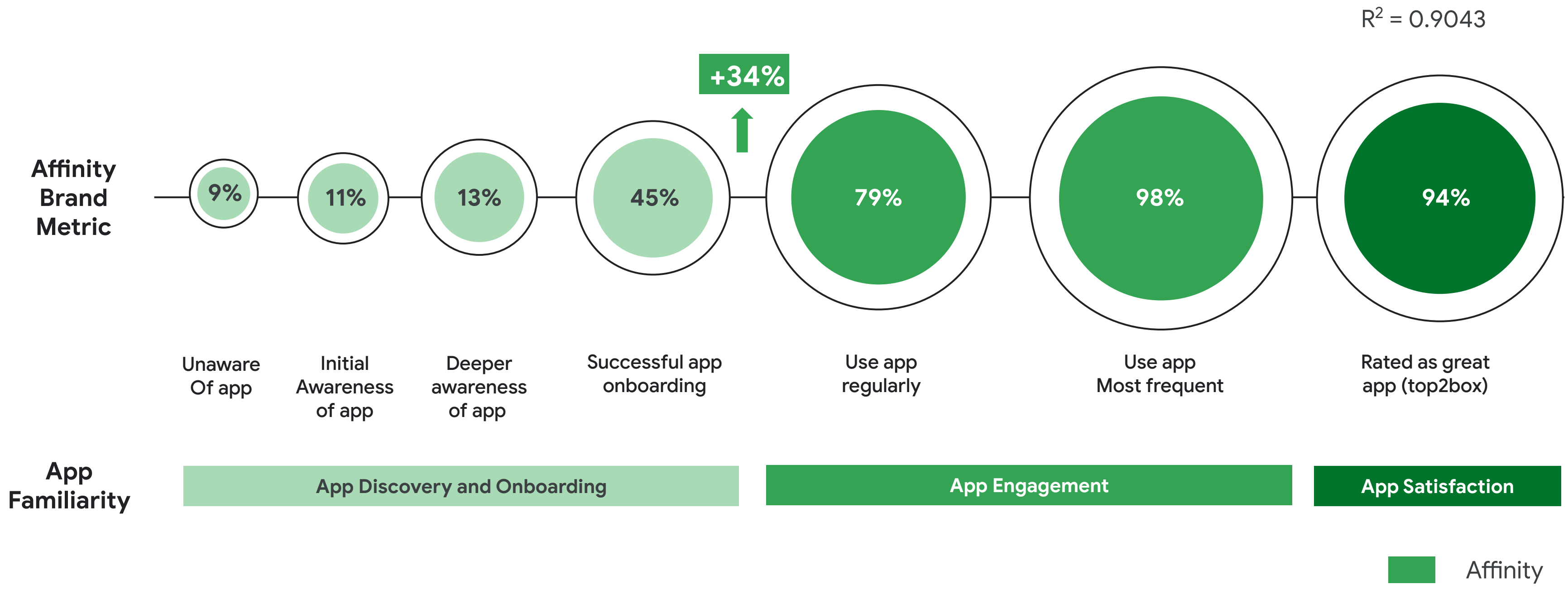
  Key reasons why app users do not try apps after install are: they don't understand what the app provides (30%); needing help (20%). Could further education (e.g. online tutorials) help overcome these perceived complexities as we know many are moving to digital as a result of Covid. Continue to promote the convenience and safety of utilizing in-app payments - especially for those who are newer to digital

App Engagement

How frequently is the app used?



Increased app engagement strongly links to brand affinity



NOTE: Similar pattern is seen for other brand metrics

App users stick to their primary telco brand, for specific usage

1.3

telco apps installed on average

3.7

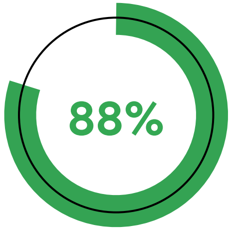
activities are regularly performed in telco apps, on average

2.2

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 = 377

App users prefer to engage with brands via apps with convenience and speed being key drivers



prefer to engage with brands through apps

9% Via their website

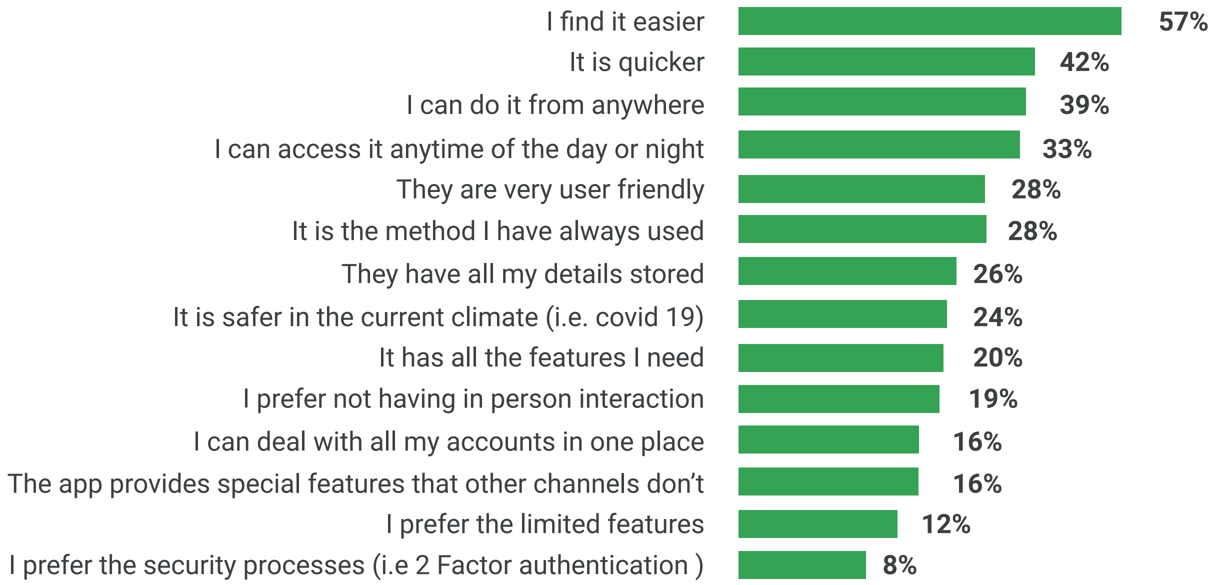
2% Via an employee on the phone

1% 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?
Total Sample = 377; Prefer to engage via App n = 331

App users prefer to engage with brands via apps with convenience and speed being key drivers

Reasons for engaging with brands through an app



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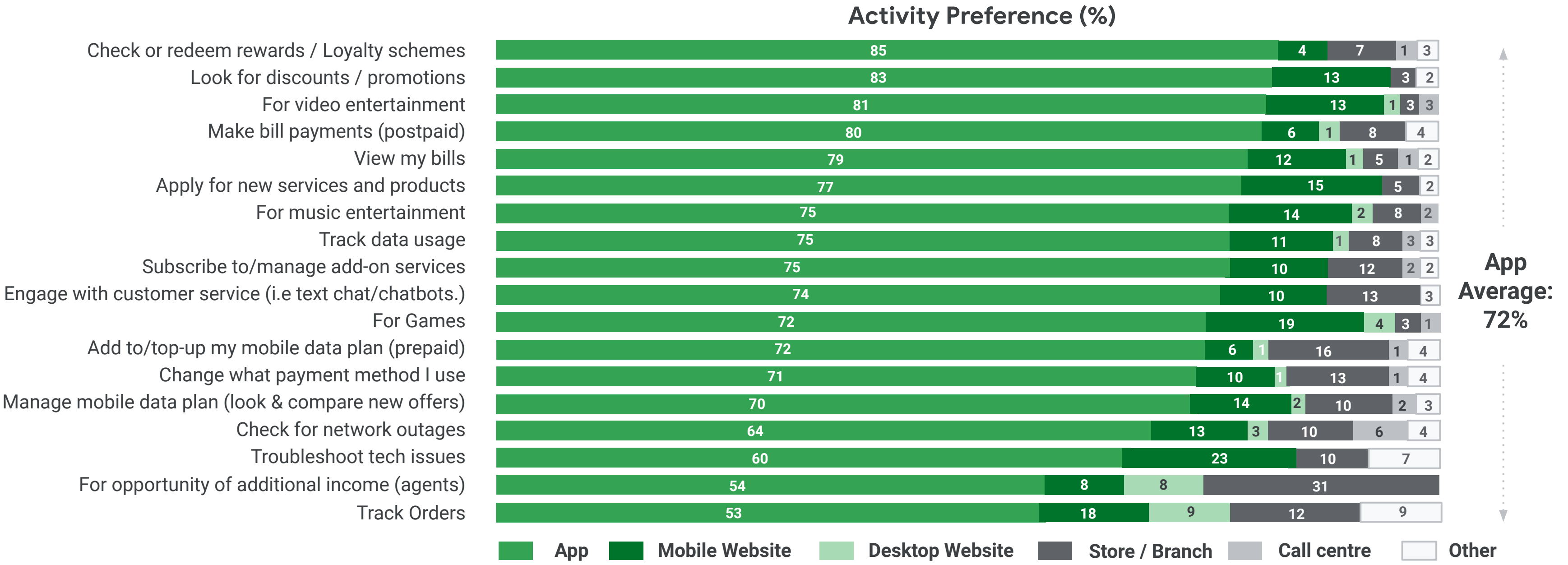
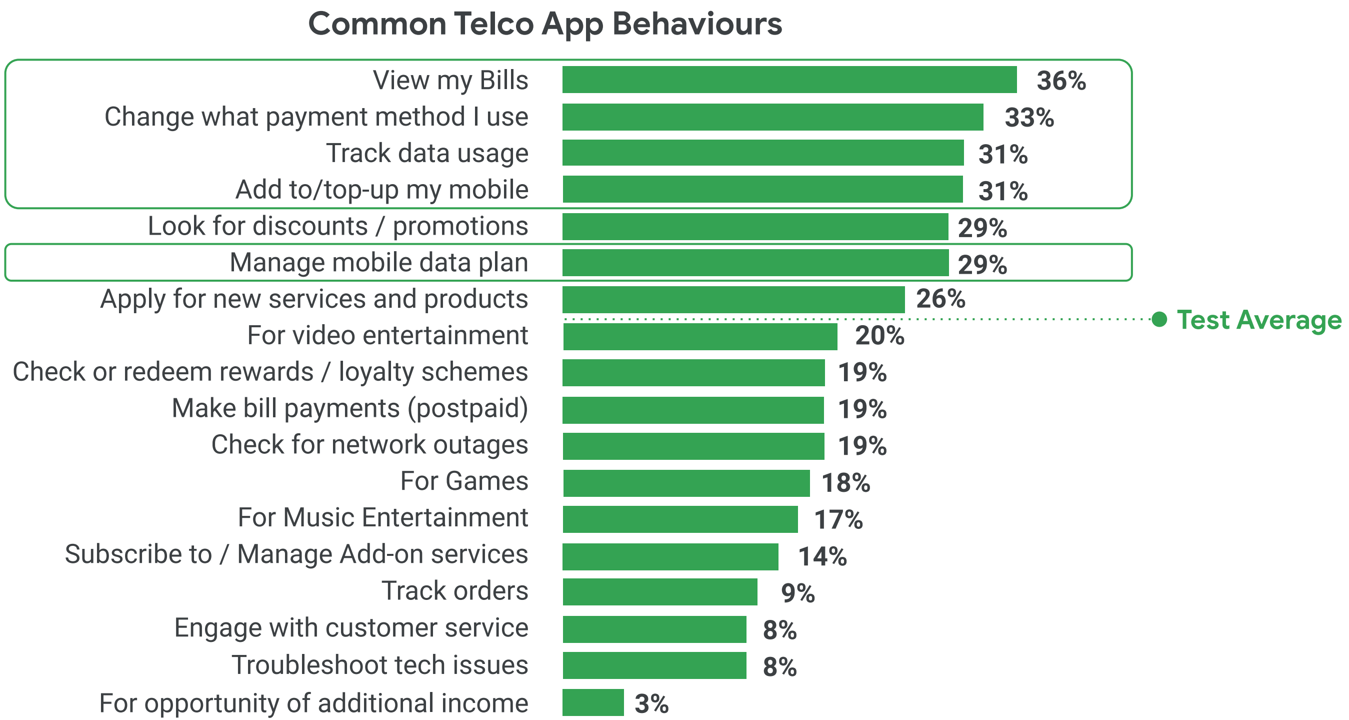
App users generally prefer apps across all key telco activities - although there are some small skews to other touchpoints



Source: CU14. Please tell us your preference for which method you would prefer to perform each activity shown below?
Total Sample = 350

Tracking data, viewing bills and managing plans are crucial activities within telco apps



Source: CU11. What activities do you regularly perform when you use <PIPE DUMMY CODE FROM S6a> apps?
Total Sample = 377

The app interface opens up new possibilities for complex telco management and extra services

App interface allows for complex management

The app interface allows consumers to keep track and manage **complex daily/weekly packages with app and timing restrictions**, hence promoting more frequent usage. **Push notifications** when they start running low on data also encourage logging in

> “In the past, it was very difficult to manage. I didn’t even know what was in my package. Now it’s so easy to check, plan and subscribe with an app.

- Male app user

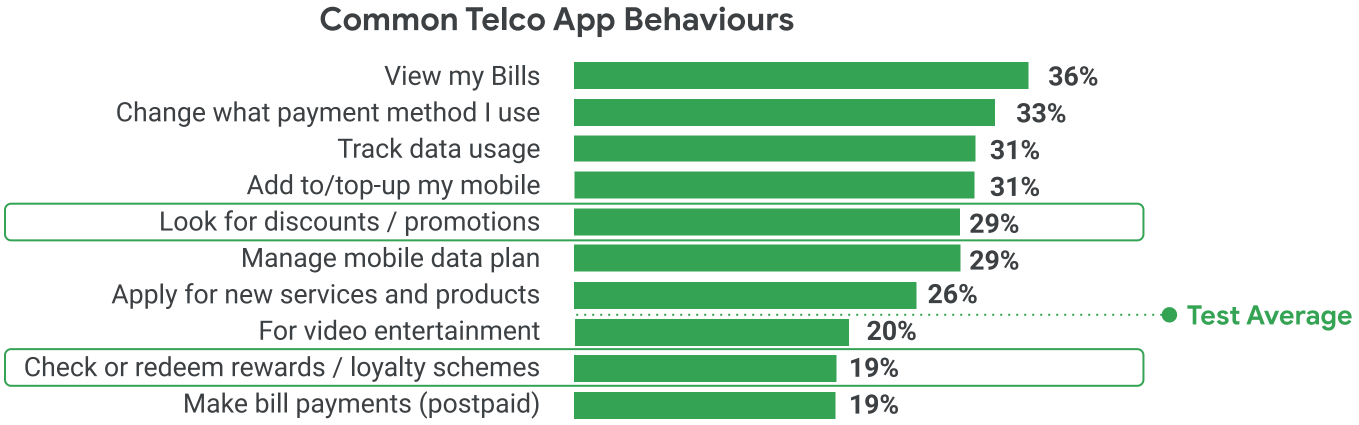
Value added services adds use cases

Value-added services gives them more reasons to use the app, as it provides additional **convenience, as well as entertainment** without needing to download another app

> “I subscribed for a Koran feature, so I can listen to recitation while at home. and they will remind me about prayer times. I use it every day. This is offered on [App A], and it means I don’t have to download another app.

- Female app user

App users are often looking to check rewards or look for promotions - a popular but secondary functions with users



Source: CU11. What activities do you regularly perform when you use <PIPE DUMMY CODE FROM S6a> apps?
Total Sample = 377

App users are often looking to check rewards or look for promotions - a popular but secondary functions with users

App interface allows for complex management

Consumers are attracted by **better value weekly or daily plans and deals** that are only available on the app, which can help them save money purchasing smaller packages as and when needed

> "First thing that attracted me are the daily package, all the discounts are there too.
>
> **- Female app user**

Limited-time deals & rewards incentivize login

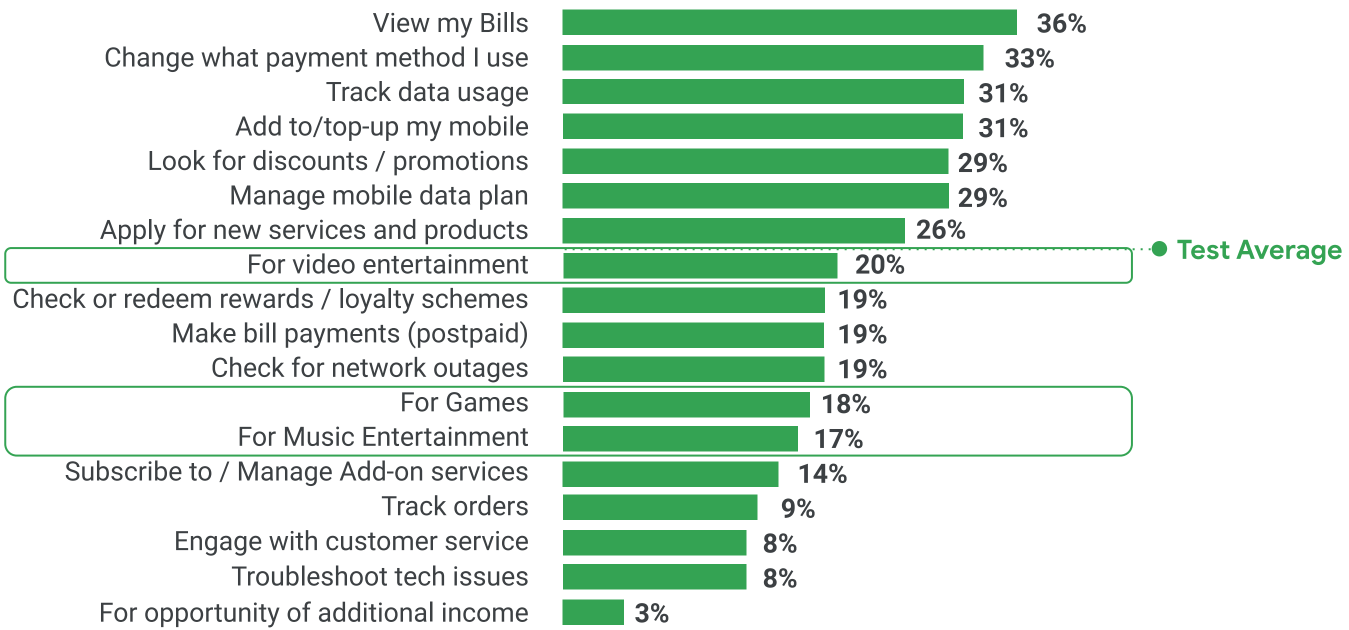
Telcos offer attractive deals and rewards (in the form of free data) that need to be redeemed within a week or even daily, which **motivates some users to log in frequently** to check for deals, stack and redeem data

> "I wait for 12am everyday so I can redeem the points. I get an internet bundle from the rewards and free internet. I get 25MB extra daily from doing this.
>
> **- Male app user**

Source: CU11. What activities do you regularly perform when you use <PIPE DUMMY CODE FROM S6a> apps?
Total Sample = 377

Alternative secondary functions like entertainment could be a gateway to draw more users across to a specific brand

Common Telco App Behaviours



Source: CU11. What activities do you regularly perform when you use <PIPE DUMMY CODE FROM S6a> apps?
Total Sample = 377

Optimizing apps in accordance to type of device and storage can help avoid frustrations

Continued Usage (Top 10)

It it takes up less memory on my smartphone	32%
If it sends useful notifications	31%
If it uses less mobile data	29%
If my friends or family are using / talking about it more	28%
If it shows its relevance during COVID-19	25%
When the app notifies me of any changes	23%
If it proved it was secure and safe	22%
If the app was updated regularly with new, useful features	22%
If a social media influencer endorsed it	20%
I have to use the app as it is with my provider	20%

For apps to continue to be useful, they need to fit within the demands of smartphone capacities in terms of memory and data.

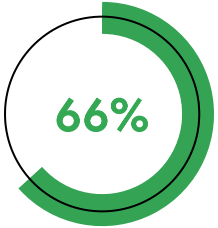
The key word here is useful - as continued usage is not overly dependent on "less notifications" or every feature fittings everyone's needs but those that do come up need to be relevant and targeted to specific users

Behaviors have changed across the world during the pandemic and many are re-assessing their choice of brands. These potentially new telco behaviors could be sustained into the long term if apps are continuing to show relevance during Covid which will lead to engrained digital behaviors into the future.

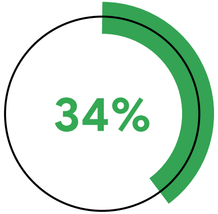
We have seen that word of mouth is a key influencer in the path to purchase
- but it doesn't end just at download. These recommendations need to continue into usage to encourage repeated and regular behavior. People influence people.

Source: CJ7. What encourages you to continue to use <PIPE DUMMY CODE FROM S6a> apps rather than delete/ uninstall them? Total Sample = 377

The majority of telco app users would prefer to have all their telco needs a part of the same app



of app users prefer a single telco app covering multiple functions

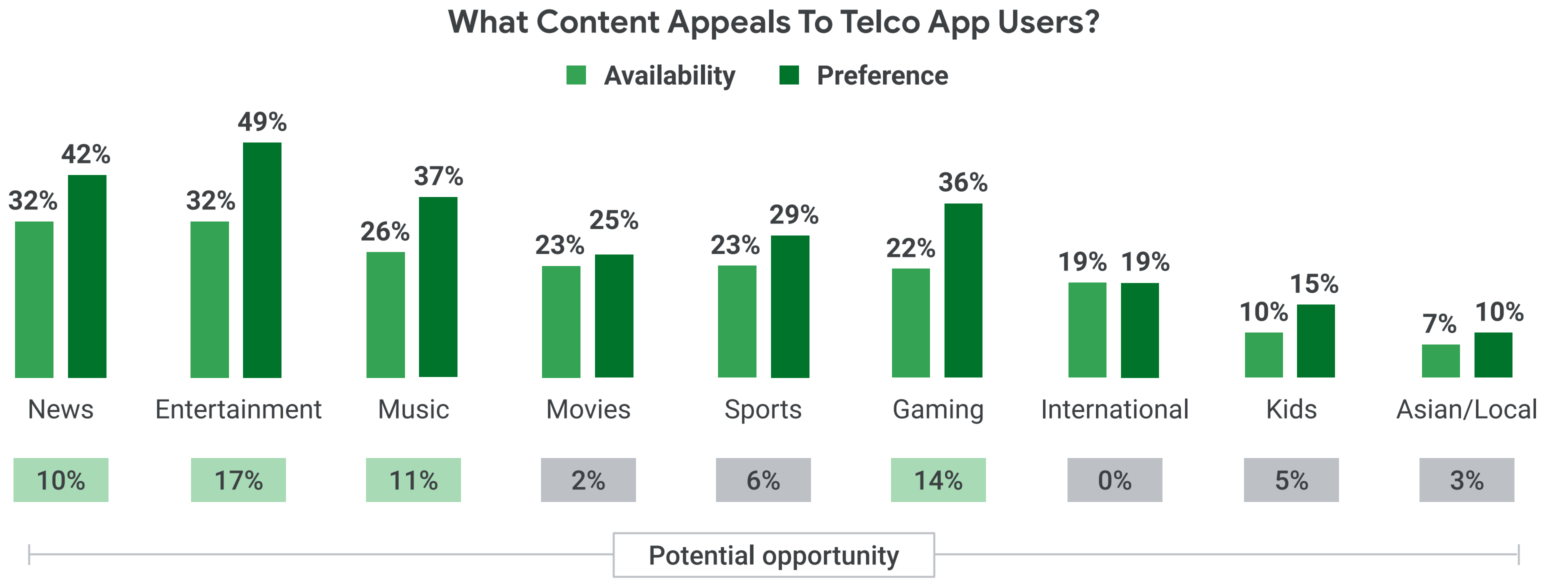


of app users prefer multiple apps that cover specific functionality

Source: 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 = 377

Perceived lack of availability of entertainment and gaming app content exists

App Engagement 4



TELCO10. And just to ask something a little bit different. Which of these following types of content appeal to you?
TELCO11. And which of these types of content do you think are widely available to you?
Total Sample = 374

There's appetite for various types of content on the go, but infrastructure and cost remain a challenge

Most content accessed is from free sources, or shared accounts

Aside from exclusive content on cable TV, most consumers prefer to look for free sources

- **Turkish dramas** (with Urdu translations / subtitles) - from free apps or pirated links like torrents
- **Cricket** - available on TV, from cable providers or when their household has a subscription. To watch on PC or mobile, they look for pirated links
- **Other dramas / hobby-related content** like cooking recipes - YouTube
- **Music** - shared Spotify accounts

"Everything is available on YouTube, I like how it recommends you more videos, and it's all free

- Females

Infrastructure limits streaming

Data connectivity in Pakistan is generally not strong or reliable enough for heavy content streaming on the go. Video content is **often consumed at home** to avoid having to deal with spotty network coverage when on transport.

However, as the infrastructure develops, there is potential to deliver music/video content to consumers' mobile devices.

"I'm using my brother's Spotify, the best thing is the variety of music. If my Ufone has something similar, I might pay for that. Then I wouldn't need his subscription and it would all be on one app

- Females

"Wow, if they have all these features, it would be life changing. I would love to be able to watch sports on live TV on my phone, anywhere I go

- Males

App Engagement:
Key insights and recommendations

Insights

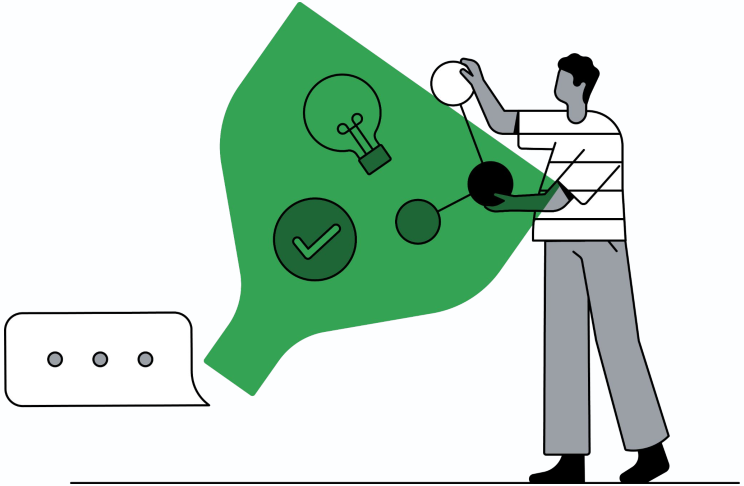
- App engagement has a strong positive correlation with brand satisfaction and customer retention
    - **72%** of 'most frequent' users are satisfied with the brand
    - **94%** of 'most frequent' users are likely to stay with the brand
- **88%** of app users prefer to engage with telcos via apps - apps are quick, easy and safe
- **72%** of app users state they prefer to use apps for critical tasks such as **viewing bills and tracking data** as well as secondary functions such as redeeming rewards, discounts and video entertainment
- App users are encouraged to continue usage when apps are proven **to take up less memory (32%), sends useful notifications (31%), uses less mobile data (29%) and is recommended (28%)**

Recommendations to improve brand metrics

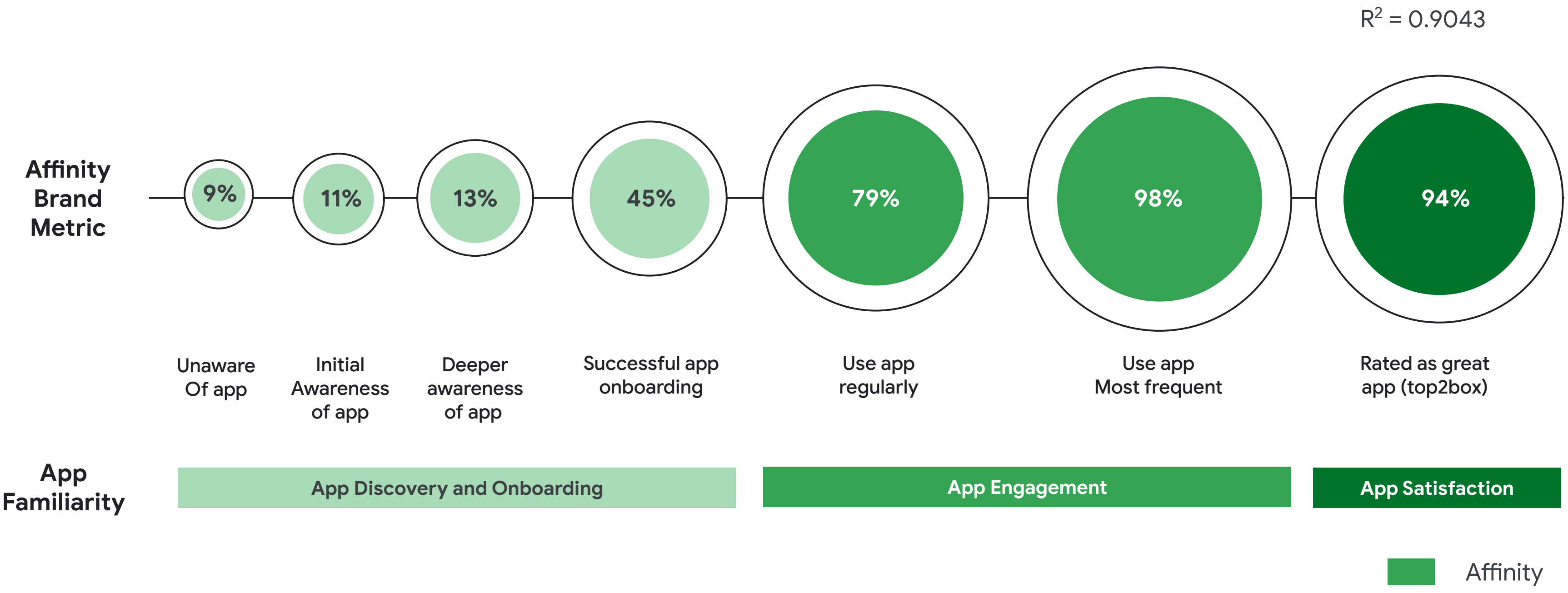
- **Upkeep core features that bring app users back**
  E.g. viewing bills (36% perform regularly), track data (31%), top-up plans (31%), manage plans (29%)
- **Maximize opportunity areas around rewards and discounts**
  Telco apps are becoming increasingly popular for discounts (65% perform regularly) and redeeming rewards (19%)
- **Raise awareness of underutilized yet helpful features**
  Assuming they work well, underutilized entertainment features such as video (20% perform regularly), music (17%) and gaming (18%) can help increase the value of an app to users
- **Ensure notifications are hyper-relevant**
  Consumers enjoy useful notifications - could this be a way of reminding about top-ups when data is low - or promoting entertainment options

App Satisfaction

How satisfied is the user with the app?



Strong app satisfaction creates a strong link to brand affinity



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

When app users are highly satisfied with the app (9 or 10 out of 10).....			
Affinity (among brand users)	**Satisfaction** (among brand users)	**Retention** (among brand users)	**NPS** (among brand users)
9.5 in 10 like / love the brand (top2box)	**8 in 10** are satisfied with the Brand (top2box)	**9.5 in 10** are likely to stay with the brand (top2box)	**8 in 10** are likely to recommend the brand (top2box)
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

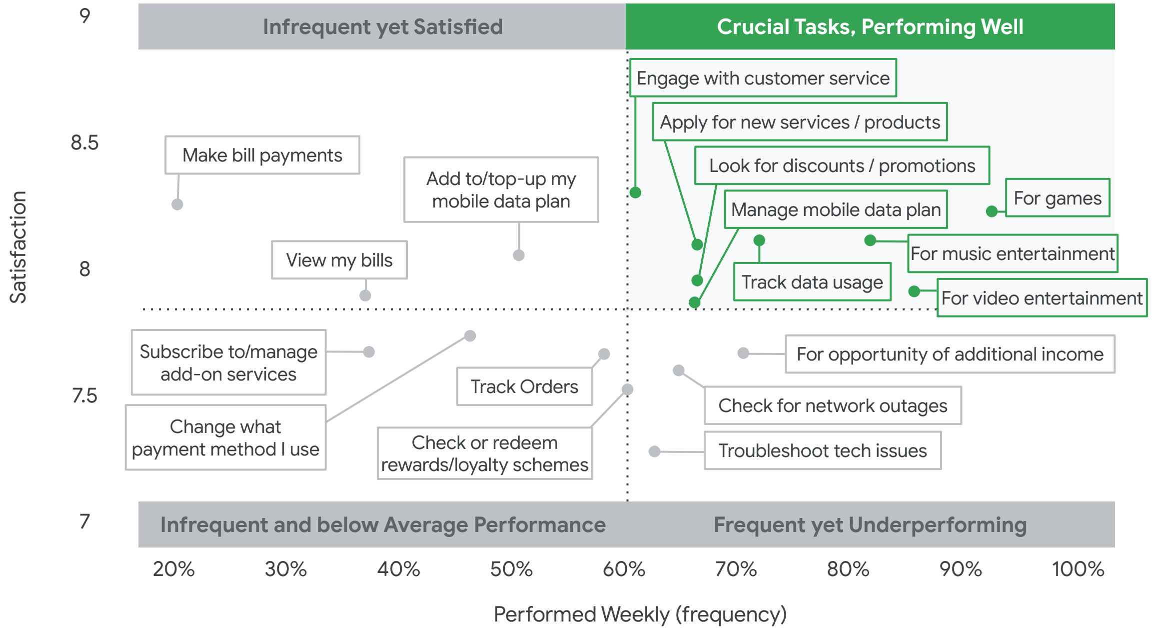
Satisfaction will be driven by meeting key motivators; providing Covid safety and convenience

Primary Motivations To App Usage

Covid Safety (% strongly agree)		**Convenience** (% strongly agree)	
Apps are safer than using cash	41%	They are more convenient than going in-store	40%
They keep me safe during the Covid pandemic as I do not have to go outside	36%	I can use them from anywhere and at anytime	39%
		I like the ability to top-up my mobile data / pay my bills plan through the app	35%
I prefer to use digital payments over cash	33%		
Health and safety is a priority as a result of the pandemic with app users moving to digital over physical currency		All in one convenience is a strong motivator to app usage	

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 = 377

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 on these critical activities

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 = 377

Poor consumer experience will lead to deletion - alongside hardware limitations and other distractions (notifications, ads)

Satisfaction: Deletion Top 10

Poor interface	16%
My current app does a better job	15%
There were too many ads	15%
It takes up too much memory on my smartphone	14%
It had provided me with the information I needed	14%
I delete apps and reinstall them when I need them again	13%
It seemed to be draining my battery	13%
It has bugs / keeps crashing	12%
I was having a general clean up of my apps	12%
Lockdown had eased and no longer required the app / went back to my previous behaviour	12%

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 app users have concerns over storage and battery - this leads to reinstallation as and when apps are needed. But there is a preference for the larger multi-purpose apps which will take up storage.

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

48% do not delete telco apps

38% 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 = 377

Telcos can continue to develop on basic app functions and further educate new users that have joined due to Covid

Offline Access

Not every place has great internet connectivity, and at times people are limited by the phones they can use. Telcos can look to incorporating features that don't always rely on a constant internet connection, making users feel like they can maintain a regular app habit from where they live or work

- "There should be an **international packages**"
- "There are no **packages to call foreign countries**"
- "**Out of country packages** should be good"

Telcos can continue to develop on basic app functions and further educate new users that have joined due to Covid

International Contact

Covid has misplaced many people across the world. Being able to contact anyone around the world would go along way to retaining and keeping current users satisfied. New users might not be quite up to speed with video calls, which Telcos could capitalize on as an opportunity for growth

- "**App should run** if there are **no internet packages**"
- "It **should run without internet**"
- "There is **no free internet**, improve network"
- "**Speed is slow**, it takes time to install app"

Telcos can continue to develop on basic app functions and further educate new users that have joined due to Covid

Package Variety

To manage any financial struggles due to Covid, brands can look into what data packages are most appealing, and offer different reward or loyalty programs that deliver on requests for different data top-ups

- "**Rate of packages** should be cheap"
- "Give **15 days packages**, rate should be low"
- "New packages should be updated it should **provide more minutes and mbs**"
- "It should be fast, give 500 mb but they **provide 10 to 20 mb as a gift**"

There's opportunity in building on telcos' experience in the payments space, and allowance for customization

Consolidate strengths across apps

Some telcos are already in the payments space with established e-wallets, in addition to having a suite of value-added services. Consumers see value in **consolidating these functions** in one app for greater convenience and rewards

> “I wish I can use my mobile app like Easypaisa, all in one account. And use it for payments. Then it can do everything. Even use it for remittances. And get 10% cashback on the payments.
>
> **- Males**

Allow preference and setting customization

The app should **understand a range of telco management needs** and help guide consumer choices with minimal confusion, as well as **let consumers set preferences and customize** most frequently used functions

> “I wish I can use my mobile app like Easypaisa, all in one account. And use it for payments. Then it can do everything. Even use it for remittances. And get 10% cashback on the payments
>
> **- Males**

Build loyalty via a user community

Consumers in Pakistan thrive on communities - they are **eager to share their experiences** with others, as well as learn about more ways that they can use the telco app to benefit their daily lives

> “It should be like Facebook, like a community application, people can share their experiences. It might help others. So I can talk about how I use my Ufone application, and help other people, all on one platform. Community is important.
>
> **- Males**

App Satisfaction:
Key insights and recommendations

Insights

- App satisfaction is strongly correlated with brand recommendation - **77% who positively rate an app regard themselves as brand promoters**
- **66%** 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 safety and convenience - **41% strongly agree apps are safer than cash, 40% strongly agree apps are more convenient than going in-store; 39% strongly agree they can use apps anywhere, anytime**

Recommendations to improve brand metrics

- **Get the basics right, consistently**
  Ensure critical tasks (e.g. managing plans, tracking data) are reliable, seamless & elicit high satisfaction. Poor interfaces and disruptions quickly put users off. Ensure all functionality is available in one app
- **Promote other activities eliciting satisfaction**
  Telco users are very happy with discounts, and entertainment options within apps - they should be promoted further
- **Innovate to meet consumer needs**
  Whether they are current or new users, Covid has had an explicit impact on Telco app usage. People are appreciative of the safety and convenience of apps, but some may struggle financially or miss connecting with friends and family due to poor internet connectivity. Telco users are **asking for a variety in packages that offer levels of flexibility**, as well as features that can operate offline

Thank you