

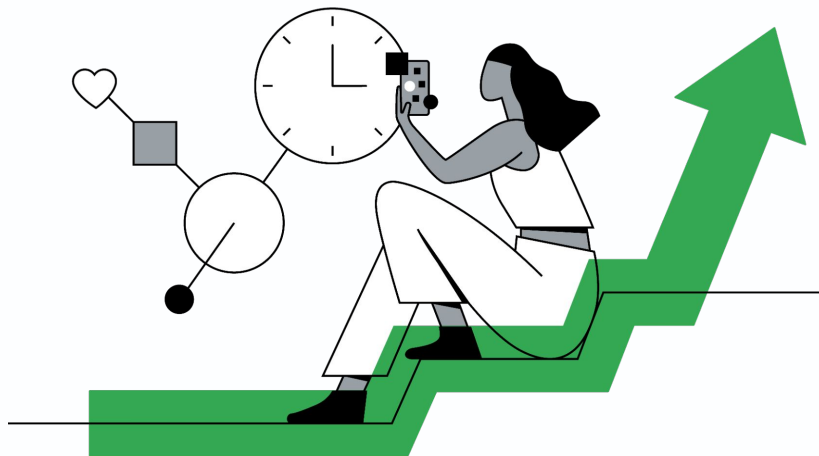
Think with Google

KANTAR

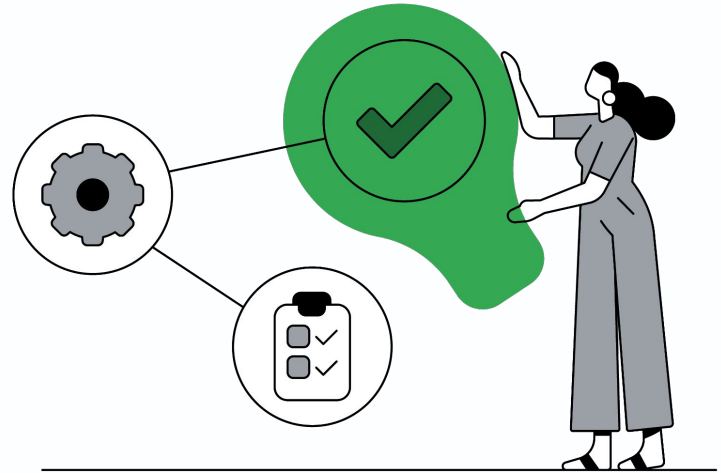
SIXTH
FACTOR

Apps: How to realize their full value

Retail, Indonesia



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=2002 for Indonesia Quantitative with 2 playgroups (n=4, each) per vertical for Qualitative. Research covered 9 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 retail users: Use retail apps 1-3x a month & conducts 4 different app activities
- Heavy retail users: Use retail apps at least once a week & conducts 4 different app activities

Using screenout data, the incidence of retail app usage is approximately 83%.



Who are generally using retail apps?

Profiling

Gender

42% Male 58% Female

Age

63% (18-34) 37% (35-64)

Internet Usage

100% Daily

Operating System

4% iOS 95% Android

Smartphone Storage

Under 16 GB 3%

16 GB 10%

32 GB 27%

64 GB 37%

128 GB 19%

Over 128 GB 4%

Income

Less than Rp. 2,500,000 9%

Rp. 2.500.001 - Rp. 4.000.000 13%

Rp. 4.000.001 - Rp. 6.000.000 23%

Rp. 6.000.001 or more 55%

Connected Devices

Smartphone 100%

Tablet 41%

Laptop computer 84%

Desktop computer 51%

Smart speaker 25%

Prepaid v/s Postpaid

Advance top up online 73%

Advance top up in-store 18%

Contract / fixed bills 9%

Region

70% Metro 30% Non-Metro



What insights did the research aim to uncover?

01

What constitutes an 'effective' retail 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 impact has the pandemic had on consumer behaviour in retail apps?

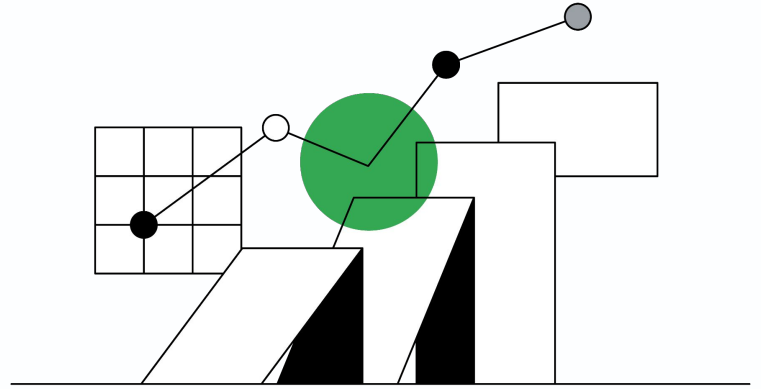
07

What are the current and future payment habits of consumers who purchase retail products?





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



- Over **90%** of are **aware of retail apps surveyed in Indonesia**
- On average **26% of retail app users are not using the apps of brands they have used in the past 3 months** - large online providers have the best conversion. A small percentage have **tried and deleted** (average: 9%)
- App discovery is a starting link to **building brand affinity** - 54% of positive onboarders having strong brand affinity
- **33%** of app users have installed at least one retail app but never used
- Online shopping is **preferred across retail categories**

Recommendations to improve brand metrics



- **Focus less on awareness of the app as awareness is high**
Time is better spent on promoting install or onboarding
- **Encourage installation through regularly used and influential touchpoints (and key demographics)**
E.g. online reviews. advertising on video sites and word of mouth is crucial, both online and offline
- **Focus more on improving app trial and onboarding**
Key reasons why app users do not try apps after install are: they use other apps (36%), they perceive the app to be complex (30%). Encourage usage by alleviating frustrations - use promotions, take the initiative to promote updates, and uphold security to protect user privacy



App Engagement:

Key insights and recommendations

Insights



- App engagement has a **strong positive correlation** with brand satisfaction and customer retention
 - **70%** 'most frequent' users are satisfied with the brand and **98%** 'most frequent' users are "quite or very likely" to stay with the brand
- **84% of app users** prefer to **engage via apps** - users find apps are quick, easy and safe. Many have **multiple apps** installed
- **Over 80%** of app users prefer to use **an app** for all activities (except monitoring items that are in an auction, engaging with customer service and applying for new services)
- App users are encouraged to **continue usage** when apps are **secure (63%), use little memory (50%) and are updated regularly (43%)**

Recommendations to improve brand metrics



- **Upkeep core features that bring app users back**
E.g. research and promotion features are heavily used - 83% look for promotions regularly, 63% browse and compare products
- **Maximize opportunity areas around check-outs**
Retail apps are popular for obtaining detailed information and discounts, however 45% of app users regularly buy products in an app - are consumers uncomfortable with purchasing via an app or being frugal during the pandemic?
- **Raise awareness of underutilized yet helpful features that can help others**
When researching, many app users utilize reviews but fewer write them (36% regularly). Can app users be enticed with further promotions in return for writing product reviews?



App Satisfaction:

Key insights and recommendations

Insights



- App satisfaction is strongly correlated with brand recommendation - **94% whom positively rate an app regard themselves as brand promoters**
- **74%** of app users would **prefer a multi-functional singular app** compared to multiple single purpose apps
- Retailers can meet changing consumer needs by providing convenience as well as safety in this time in a pandemic world - **53%** strongly agree they can use them from anywhere and **47%** strongly agree apps keep them safe during Covid

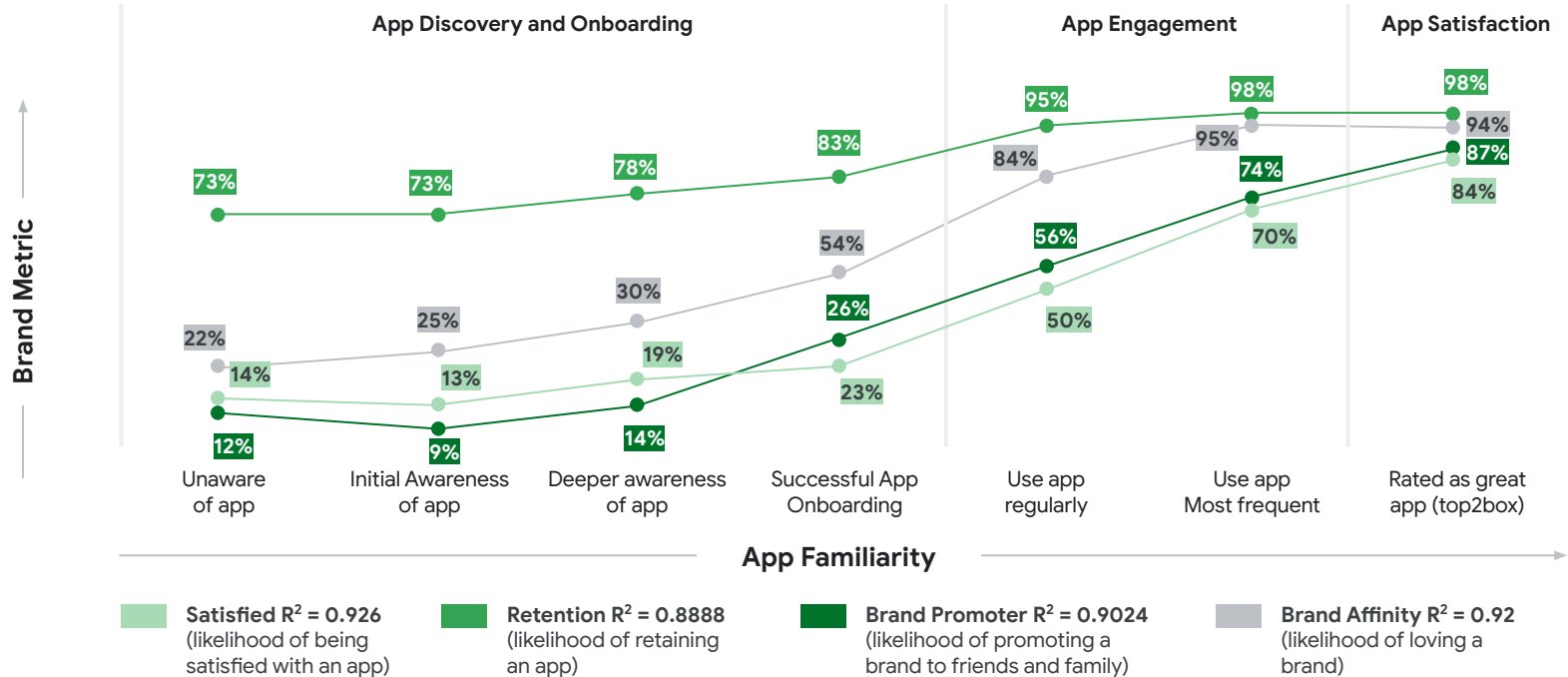
Recommendations to improve brand metrics



- **Get the basics right, consistently**
Ensure critical tasks (e.g. browsing, comparisons, photos) are reliable, seamless & elicit high satisfaction. Bugs, security concerns and excessive ads quickly put users off. Many app users may delete and reinstall if apps take up too much storage space
- **Understand changing consumer needs**
The pandemic has resulted in more consumers shifting to digital - 39% strongly agree they prefer digital payments over cash and 36% strongly agree that apps are safer than cash
- **Innovate to meet consumer needs**
Brands need to keep up with needs by providing increased virtual access, trust in data security and relevant functions that go beyond the current critical tasks

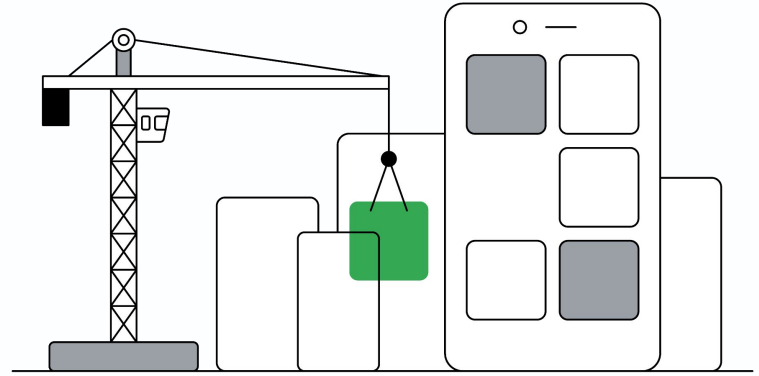


There is a strong relationship between brands and app usage. Increase in brand scores are evident as a user engages more with the app.



App Discovery and Onboarding

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

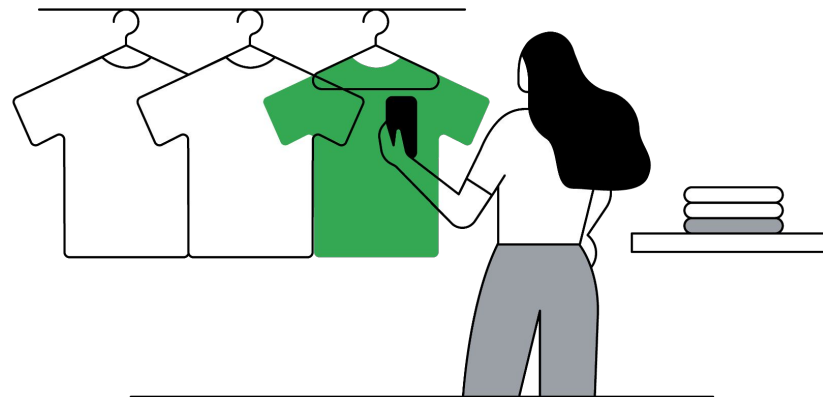


Apps help to promote progressive perceptions of the brand

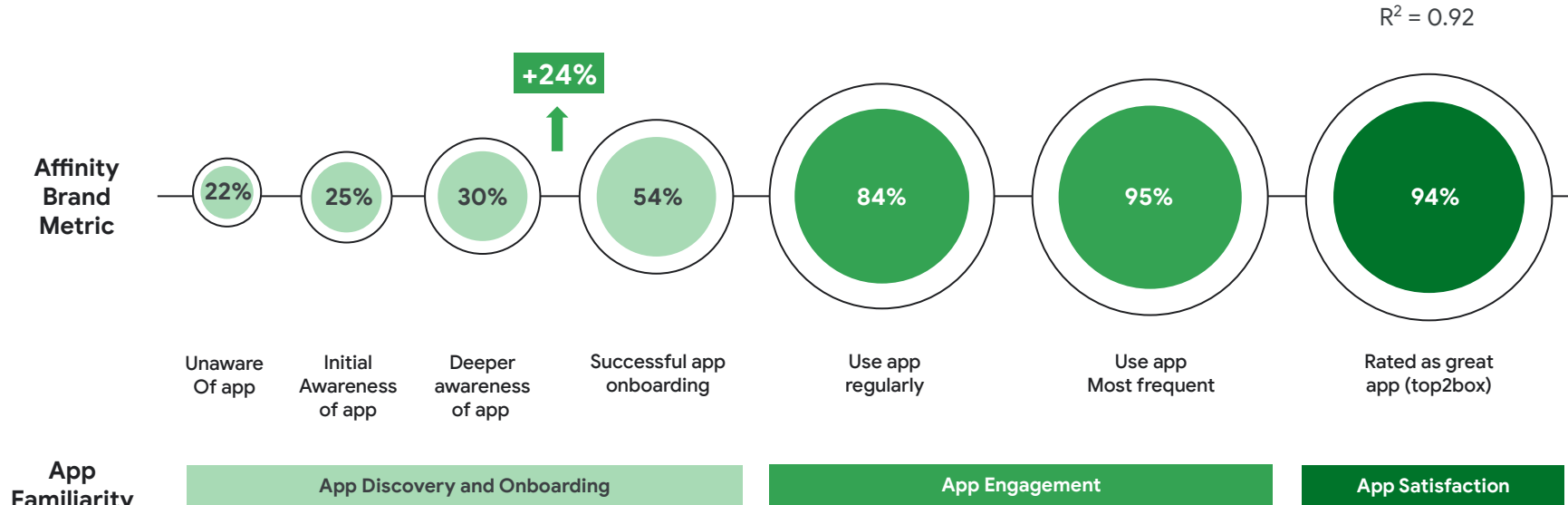
For brands that have offline store presence, providing a shopping app signals to consumers that the brand is progressive which drives positive perceptions of the brand

“ It's great for offline brands to have shopping apps, shows that they are keeping up with the times.

- Light app user



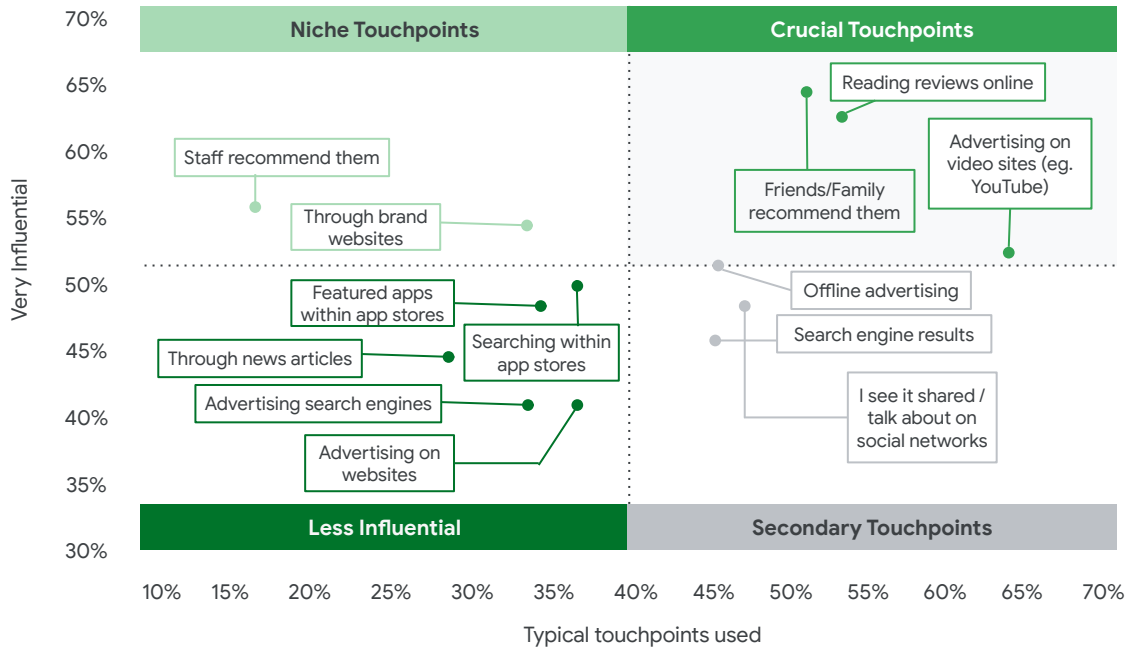
When users shift from being aware to actually trying an app, there is a significant impact on brand affinity



■ Affinity = the extent to which an app user loves the brand



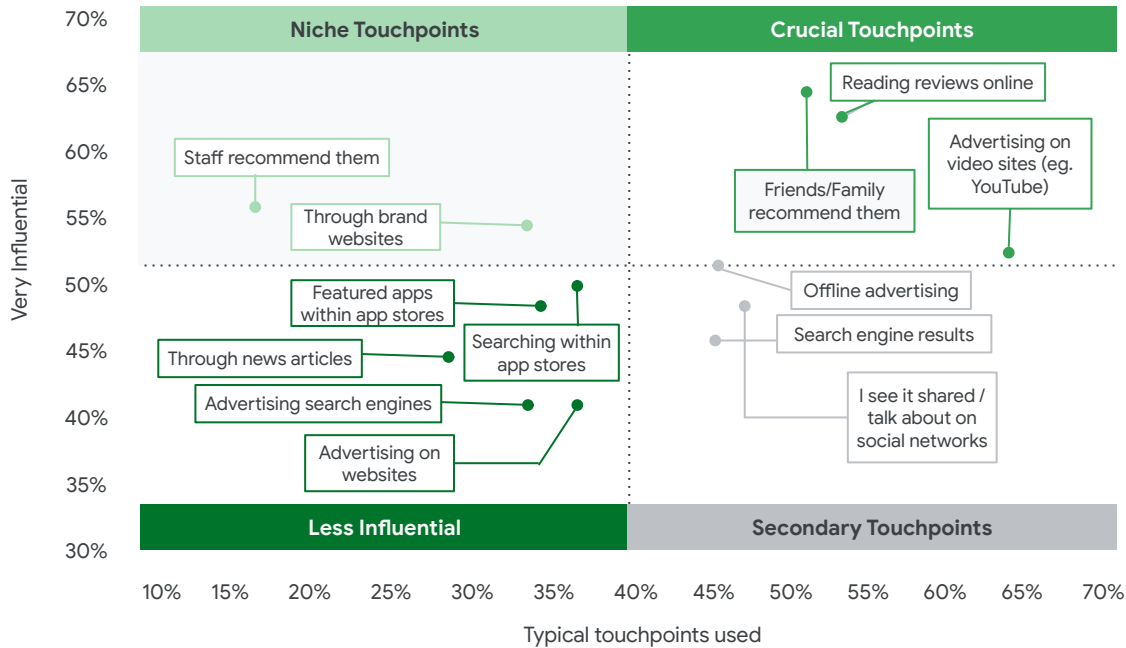
Ads on video sites and online reviews are crucial touchpoints for app discovery and are complemented by offline word of mouth



Crucial Discovery Touchpoints	
Touchpoints that are frequently used and influential in installation decision making	
Online	Offline
Advertising on video sites	Family / friends recommend them
Reading reviews online	



Staff recommendations and website advertising are also highly influential in decision making - but under utilised



Crucial Discovery Touchpoints	
Touchpoints that not frequently used yet are influential in installation decision making	
Online	Offline
Brand websites	Staff recommendations



Availability and offer of reassurance could also trigger app download and first use

Additional motivations for app discovery

Product availability	Cannot find it in offline store and/or other online platforms
Secure payments	Marketplace apps only release payment to sellers after product is received to mitigate fraud risk
Product authenticity	High value items that runs the risk of fraud, hence purchase directly from the brand or more reputable platforms.
Awareness driven by ads	Triggered by ads on Facebook, Instagram, YouTube, TV
Key Opinion Leaders / Sellers' recommendation	Key Opinions Leaders and sellers provide links to marketplace app to buy the items that they feature on Facebook and Instagram



Retail app users are mainly driven by deals and promotions when downloading apps (which may be driven by the pandemic)

Installation Triggers (Top 10)

I like looking for deals and promotions	70%
It is a safer option during Covid-19	58%
I wanted to be able to compare products	58%
It had features that looked useful	48%
I wanted to look for a specific product	48%
Everyone uses this app / I was recommended to use it	38%
They offer personalised offers and incentives	35%
The app was highly rated on an app store	35%
I wanted to be able to buy / bid on products on the go	32%
It is from a well known brand	31%

The top driver for installing retail apps is consumer's quest for deals and promotions. Being able to compare products in order to get the best value and validate their choice is important in the current pandemic climate, where consumers are more conscious about their spending habits.

Safety concern arising from the pandemic is key trigger to more app installations

Social proof is a factor that drives installation - be it through direct word of mouth recommendations or reviews on app stores.



A successful app discovery and first-use is critical, otherwise, apps may remain unused

Product availability triggers first use

The first interaction with a retail app is mostly driven by the availability of a certain product that is not available on other platforms

“ I was looking for something that I couldn't find in the mall and found it online so that's how it started. It was shoes. Sometimes there are local shoes from Bandung that are not available in stores (in Jakarta). I knew about the shoes from [social media], and it has links to [App A] or [App B]

- **Light app user, 24-39 years old**

Payment security a prerequisite

Early days of online shopping via social media cultivated a fear of fraud for online sellers hence 'holding' the payment until product is received provides peace of mind

“ Before e-commerce was around, online shopping was on [Social Media] and I felt insecure. A seller from [Social Media] told me to buy from [App A] if I am concerned about payment before the product arrive, because [App A] will only release the payment after you have confirmed that the product has arrived.

- **Heavy app user, 24-39 years old**

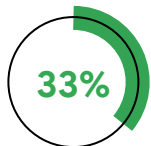


One-third of app users have unused retail apps installed due to perceived complexities

Thought Starter:

1 in 3 prefer to use other apps. Could advertising about deals and promotions (#1 reason to install) help drive app trial and onboarding?

About 1 in 3 are also deterred by the app design and user experience. Consider if the app experience is optimal for users?



have installed at least one retail app but never used

Reasons To Install But Not Use

I use a different app instead	36%
I haven't had the time	32%
The app design or user experience is complicated	30%
I don't understand what the app provides me	18%
I need someone to help me / teach me more	17%
The sign up process looks complex	15%
It is too risky to sign up to new products during Covid-19	11%



App Discovery and Onboarding: Key insights and recommendations

Insights



- Over **90%** of are **aware of retail apps surveyed in Indonesia**
- On average **26% of retail app users are not using the apps of brands they have used in the past 3 months** - large online providers have the best conversion. A small percentage have **tried and deleted** (average: 9%)
- App discovery is a starting link to **building brand affinity** - 54% of positive onboarders having strong brand affinity
- **33%** of app users have installed at least one retail app but never used
- Online shopping is **preferred across retail categories**

Recommendations to improve brand metrics

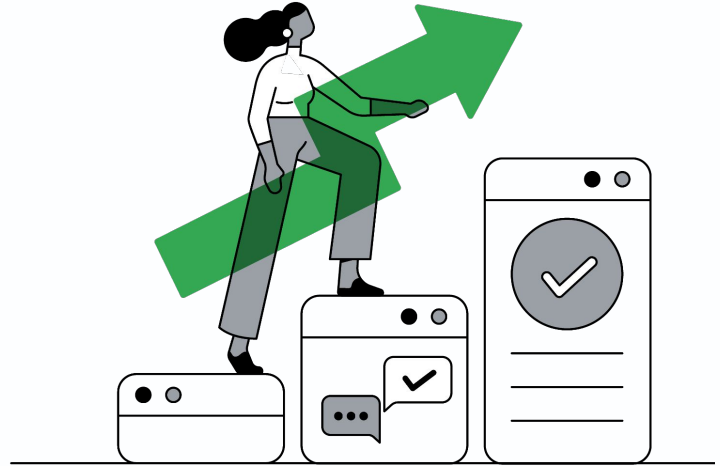


- **Focus less on awareness of the app as awareness is high**
Time is better spent on promoting install or onboarding
- **Encourage installation through regularly used and influential touchpoints (and key demographics)**
E.g. online reviews, advertising on video sites and word of mouth is crucial, both online and offline
- **Focus more on improving app trial and onboarding**
Key reasons why app users do not try apps after install are: they use other apps (36%), they perceive the app to be complex (30%). Encourage usage by alleviating frustrations - use promotions, take the initiative to promote updates, and uphold security to protect user privacy



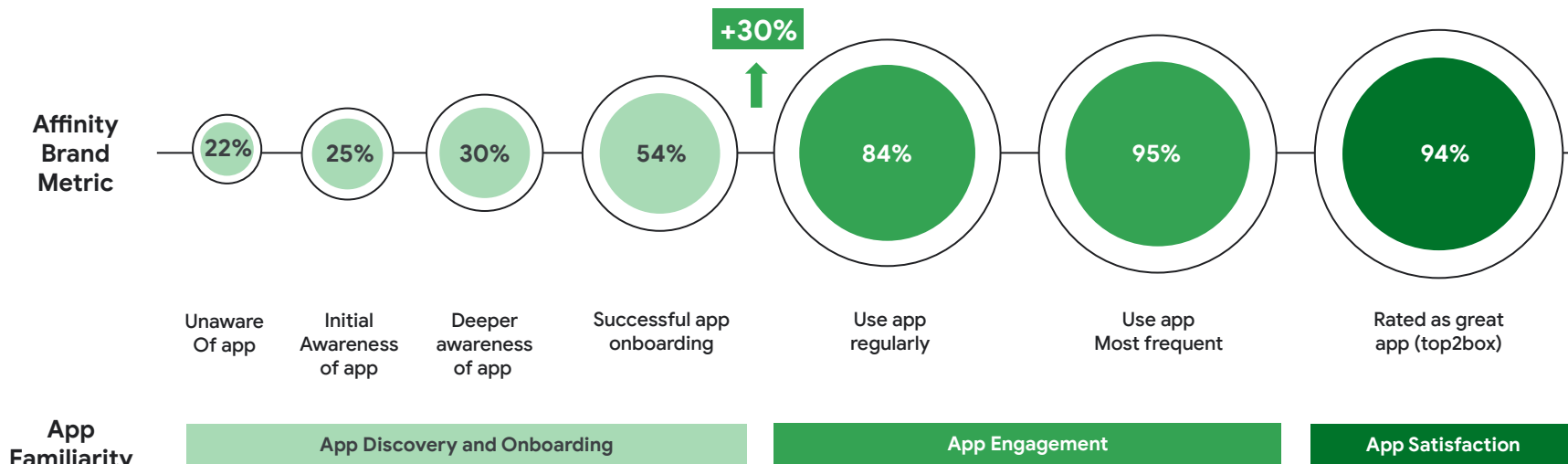
App Engagement

How frequently is the app used?



Regular usage is key as we see the highest increase in brand affinity occurring when a user transitions to using an app regularly

$R^2 = 0.92$



■ Affinity = the extent to which an app user loves the brand



Increasing the frequency of app login positively links to strong brand love, loyalty and recommendation ...

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

Affinity (among brand users)	Satisfaction (among brand users)	Retention (among brand users)	NPS (among brand users)
<p>9.5 in 10 like/love the brand (top2box)</p>	<p>7 in 10 are satisfied with the brand (top2box)</p>	<p>10 in 10 are likely to stay with the brand (top2box)</p>	<p>7 in 10 are likely to recommend the brand (top2box)</p>
<p>Brand affinity is strongly linked to levels of app engagement</p>	<p style="text-align: center;">Key for App Engagement</p> <div style="display: flex; justify-content: space-between;"> <div data-bbox="531 709 962 879"> <p>Correlation with brand satisfaction has risen dramatically as engagement deepens.</p> </div> <div data-bbox="962 709 1392 879"> <p>Nearly all consumers are likely to stay with the brand. Very strong correlation.</p> </div> </div>		<p>Correlation with recommendations has risen as engagement deepens - links to the stronger brand affinity</p>

.... so how do we deepen engagement?



Consumers seek a multitude of benefits in retail experience through the app

Key motivations to app engagement

Cost savings

Find cheaper deals on apps or vs. other apps

Easy user experience

Especially true when all of the consumer's information (e.g. name, address, payment information) is saved so it is easy to purchase

Useful information

Not only through product descriptions but also through reviews

Promotional campaigns

Flash sales and sales festivals keep consumers on the lookout for such events

Seller chat

Allows users to have questions answered about products, verification of product availability etc

Key barriers to app engagement

App monopoly

Consolidation of shopping on preferred main shopping app means less engagement with secondary shopping apps

Poor quality pictures

Challenging to see what the product looks like

Seller quality

While consumers attribute the disappointment of certain purchases with the sellers instead of the marketplace app, in the long term, they do see that it is the responsibility of the marketplace to manage their sellers. Too many disappointing experiences might lead to lapsing



Retail apps have deep, regular and varied usage

6

retail apps installed
on average

8.4

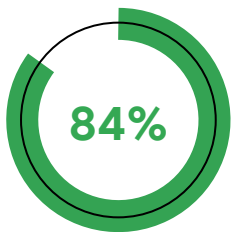
activities are regularly
performed in retail
apps, on average

6.5

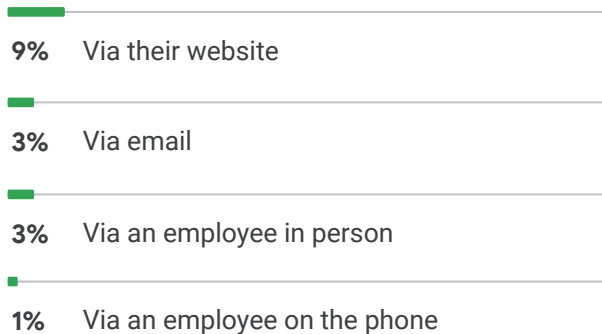
activities are
performed weekly, on
average



App users have a strong preference to engage with retailers through an app

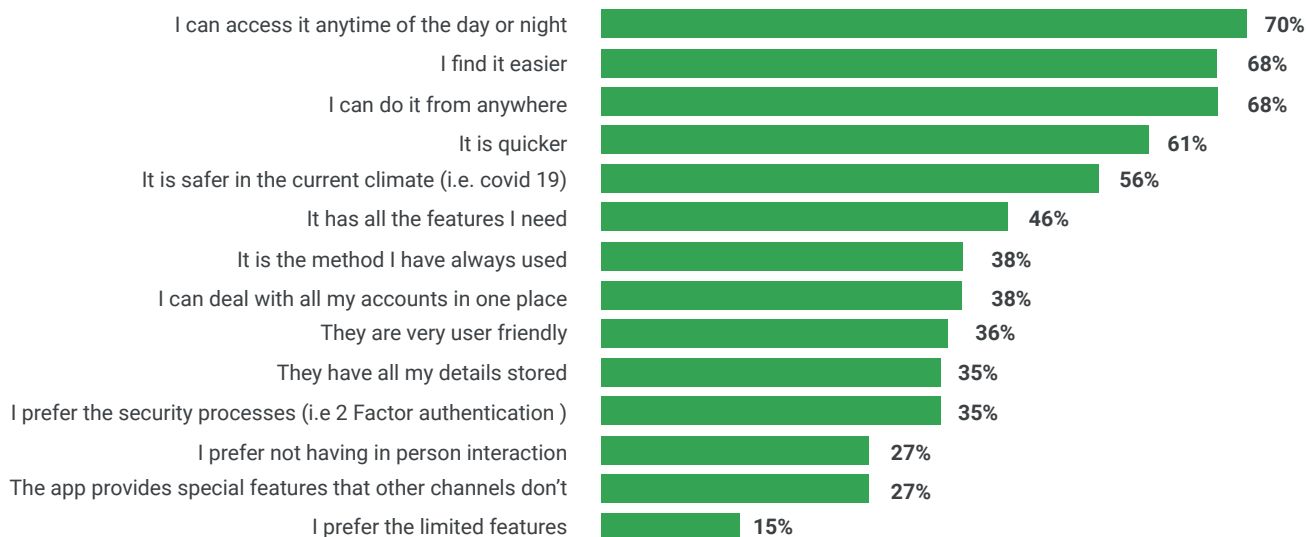


prefer to engage with brands through their apps



Apps are valued when they are quick, easy, and safe to use, especially in the current climate

Reasons for engaging with brands through an app

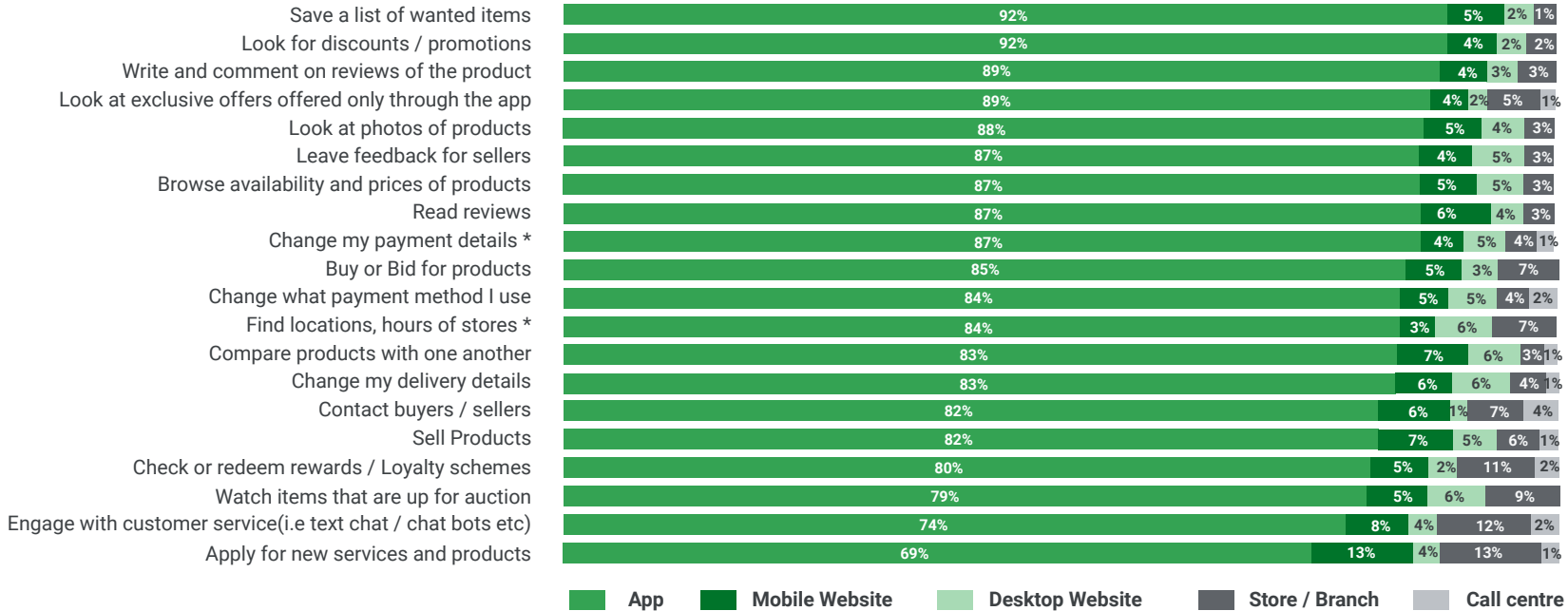


Source: CU10. Which would be your preferred way to engage with <PIPE DUMMY CODE FROM S6a> brands?
CU10a. You said you would prefer to engage with <PIPE DUMMY CODE FROM S6a> brands via apps. Why is this?
Total Sample = 601; Prefer to engage via App n = 502



Consumers overwhelmingly prefer apps, but may seek out in-person help with applying for new services and products or customer service

Activity Preference



App Average: 84%



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

Top 10 reasons for continued usage

If it proved it was secure and safe	62%
It it takes up less memory on my smartphone	50%
If the app was updated regularly with new, useful features	43%
If the app was updated regularly to fix bugs	42%
If it shows its relevance during COVID-19	39%
If it uses less mobile data	39%
If it sends useful notifications	32%
I have to use the app as it is with my provider	30%
If my friends or family are using / talking about it more	30%
When the app notifies me of any changes	29%
If I saw the app used / talked about on social media	29%

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 ensure security is always a top priority.

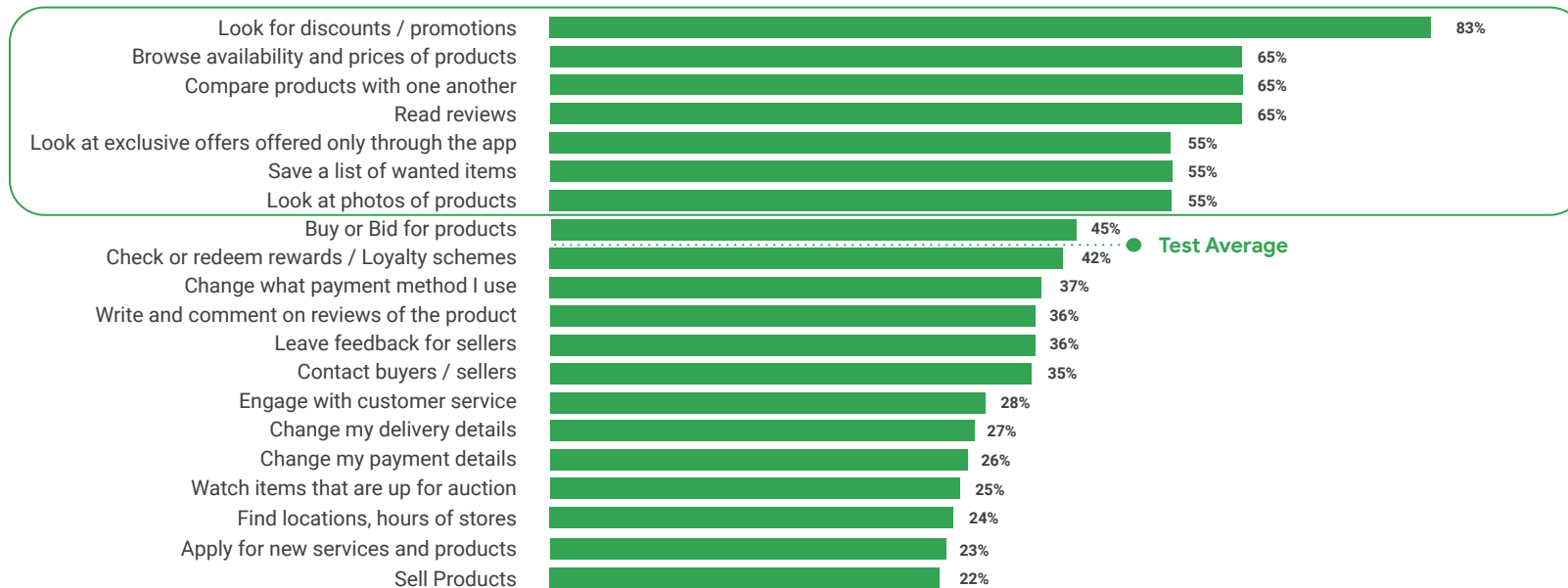
Regular updates are crucial to continued app usage whether it is new features, or fixing issues. App developers and retail brands must not stand still, especially when many people are moving to digital.

Digital retail has had a major role to play during Covid - and apps need to ensure this relevance is maintained into the future as the digital trend continues to grow.



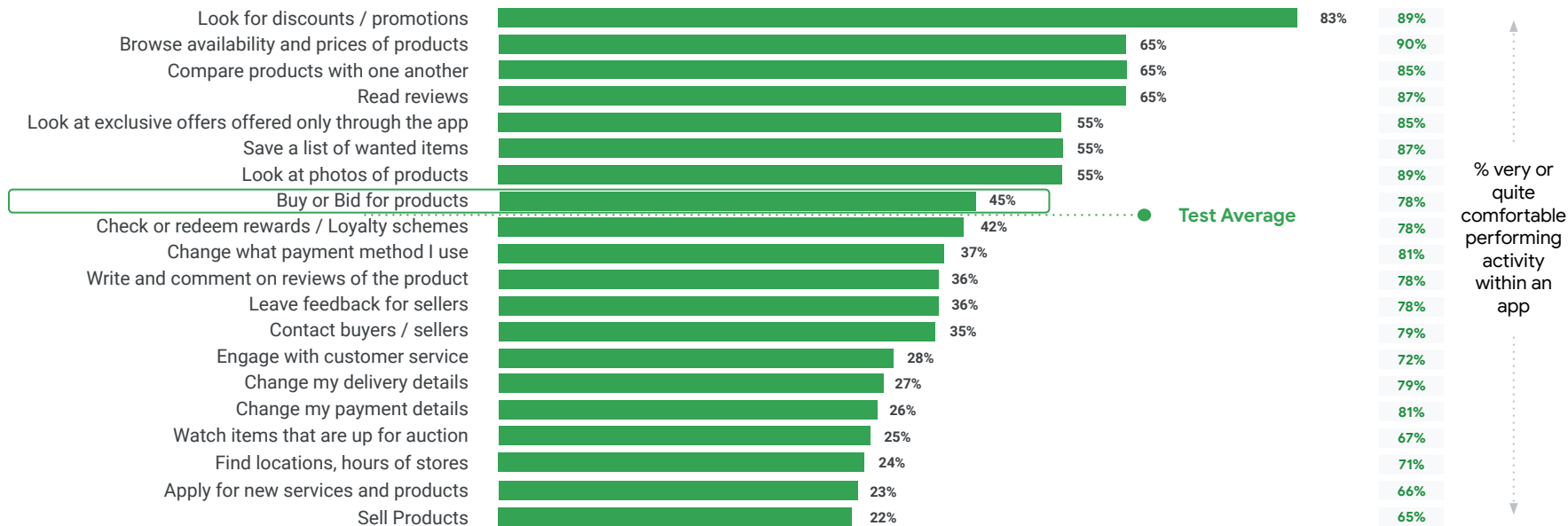
The most common behaviour in retail apps is research - users are looking for the best deals and the right quality

Common Retail App Behaviours



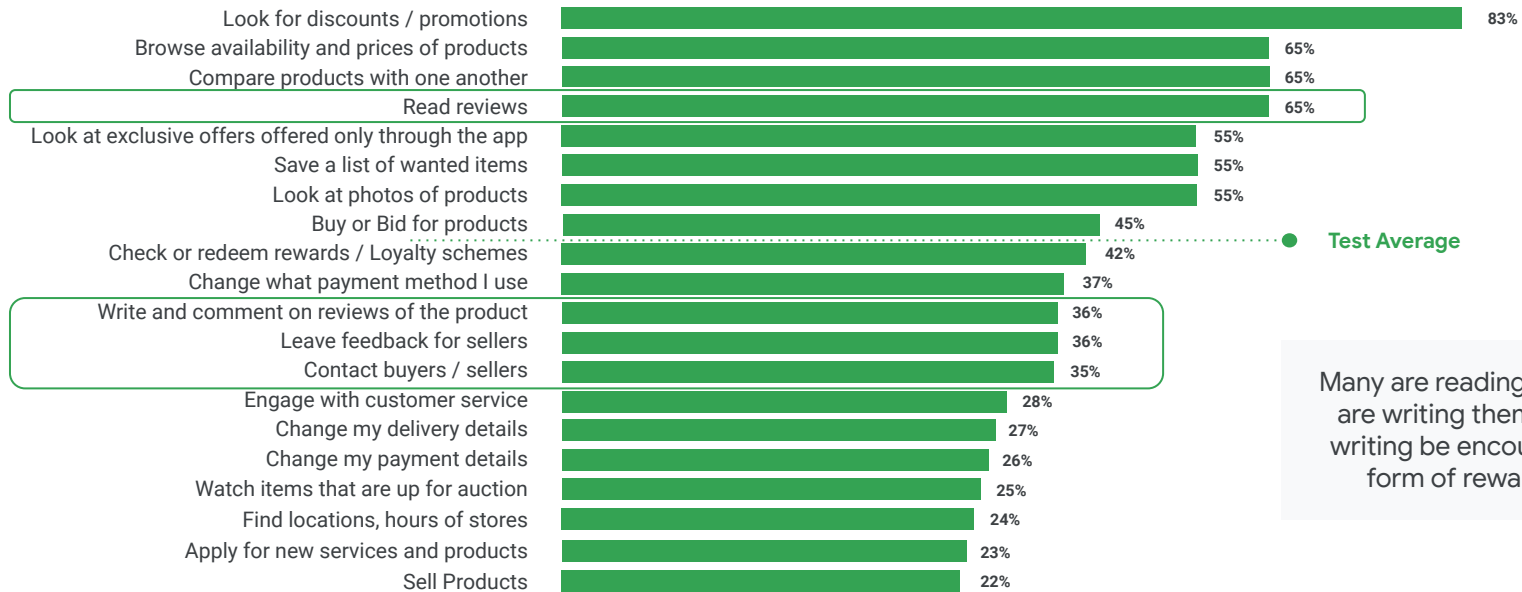
After doing due diligence, users look to purchase their products

Common Retail App Behaviours



Not as many users follow-up on purchases with reviews or feedback, but this information is key for those researching

Common Retail App Behaviours



● Test Average

Many are reading reviews but few are writing them. Could review writing be encouraged by some form of rewards scheme?



Research activities are the most common app-behaviours, but still not easily delivered even by marketplace apps

Consumers check product availability to avoid disappointment

Consumers tend to chat with the seller through the app to check product availability the availability of the product, and not assume that the product will be available even though it is offered on the website

“ Chat with seller is very important. We tell them that before they send the product, they must check to make sure the product is available and is the right product

- Heavy app user, 24-39 years old

Consumers want to and do read reviews however it requires time and discernment

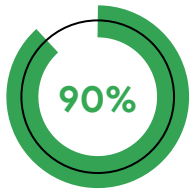
- Need some judgement on reviews as products that only have 5 star rating are doubtful
- Products with too many reviews (i.e. thousands) is a lot to go through but consumers don't want to miss out on some feedback that might be pertinent to them

“ I have to read a lot of reviews. If it has been sold a lot and rating is below 3, then I have to read through to see what is wrong

- Heavy app user, 24-39 years old

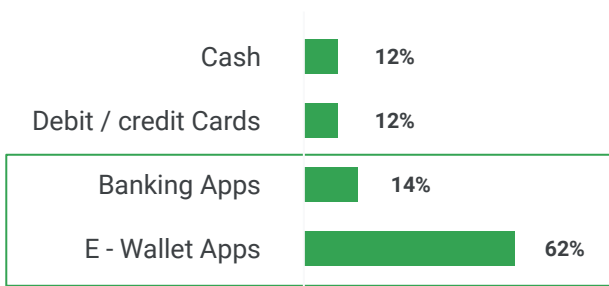


Apps / e-wallets are the future for retail purchase methods and promotions help to maintain app engagement



will use apps to complete the majority of their retail purchases in the future (post Covid)

Preferred Method For Retail Payments



Reasons To Using Apps For Purchases In Future

They have better deals and promotions	63%
I find the prices are usually cheaper	60%
I can compare prices much more easily	58%
I have become more comfortable with online shopping during Covid-19	57%
It will be the most convenient option for me	53%
It is easier to track how much I am spending	49%
I will look to shop online more in order to keep socially distanced	47%
I can get more loyalty points	46%
I have learnt how to shop online during Covid-19	35%
The delivery is very useful	33%
It is what I currently do	31%
I now have all the apps downloaded that I use regularly	27%

Source: RT4. When you currently make retail purchases, what is your preferred method of payment?
 RT5. Thinking into the future (i.e. post Covid-19), which method do you think you will complete the majority of your retail purchases?
 RT6. Why will you look to complete most of your retail purchases via apps?
 Total Sample = 601; Users purchasing with apps in future = 541



App Engagement summary:

Key insights and recommendations

Insights



- App engagement has a **strong positive correlation** with brand satisfaction and customer retention
 - **70%** 'most frequent' users are satisfied with the brand and **98%** 'most frequent' users are "quite or very likely" to stay with the brand
- **84% of app users** prefer to **engage via apps** - users find apps are quick, easy and safe. Many have **multiple apps** installed
- **Over 80%** of app users prefer to use **an app** for all activities (except monitoring items that are in an auction, engaging with customer service and applying for new services)
- App users are encouraged to **continue usage** when apps are **secure (63%), use little memory (50%) and are updated regularly (43%)**

Recommendations to improve brand metrics

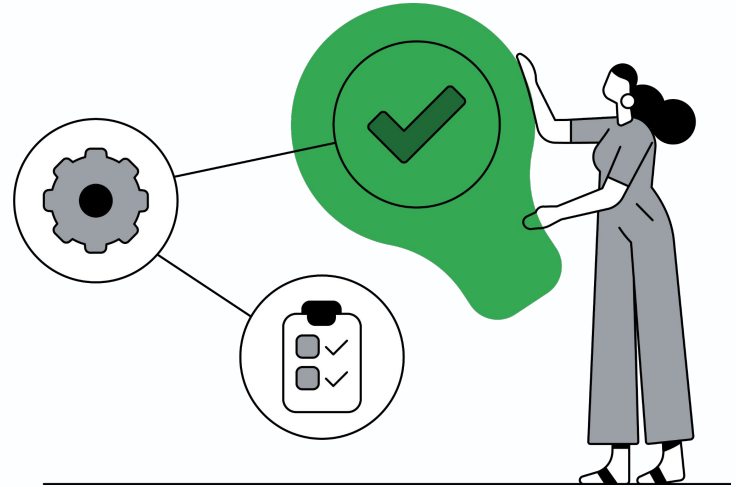


- **Upkeep core features that bring app users back**
E.g. research and promotion features are heavily used - 83% look for promotions regularly, 63% browse and compare products
- **Maximize opportunity areas around check-outs**
Retail apps are popular for obtaining detailed information and discounts, however 45% of app users regularly buy products in an app - are consumers uncomfortable with purchasing via an app or being frugal during the pandemic?
- **Raise awareness of underutilized yet helpful features that can help others**
When researching, many app users utilize reviews but fewer write them (36% regularly). Can app users be enticed with further promotions in return for writing product reviews?



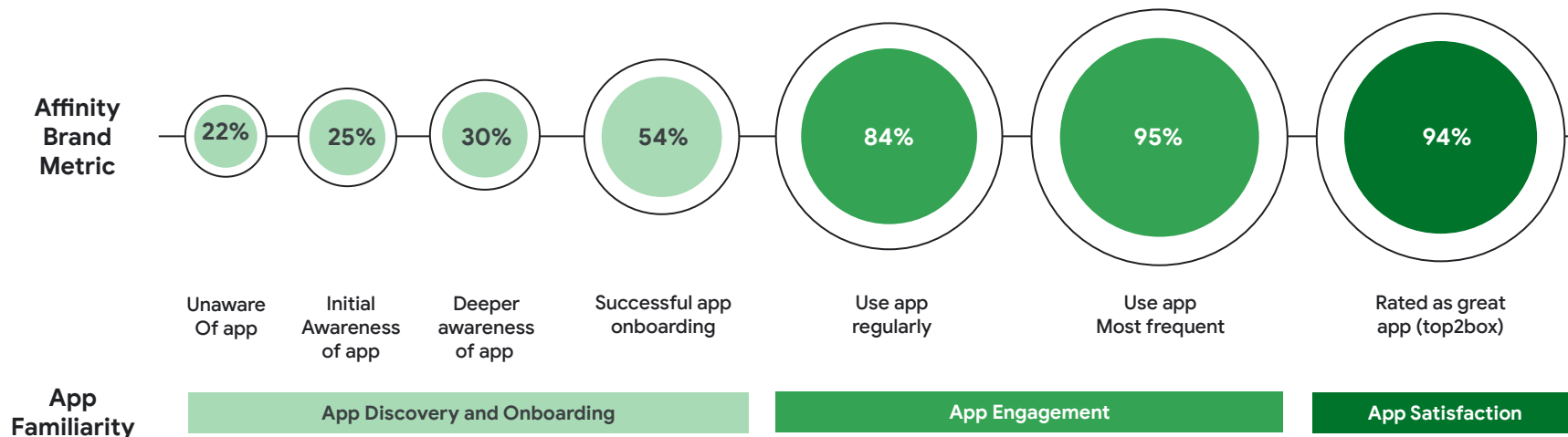
App Satisfaction

How satisfied is the user with the app?



When a user uses an app very frequently and is satisfied by it, we see very strong links to brand affinity

$R^2 = 0.92$



 Affinity = the extent to which an app user loves the brand



Increasing app satisfaction links to strong brand affinity, loyalty, and recommendation

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)	10 in 10 are likely to stay with the brand (top2box)	9 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



Convenience of retail apps helped to add to the digital push as a result of Covid

Primary motivations to app usage	
Covid Safety (% strongly agree)	Convenience (% strongly agree)
47% - They keep me safe during the COVID pandemic as I do not have to go outside	53% - I can use them from anywhere and at anytime
	44% - I find prices in app are cheaper (e.g. promotions and discounts)
39% - I prefer to use digital payments over cash)	
36% - Apps are safer than using cash	38% - I prefer the flexibility of payment options (e.g. Google Pay, Apple Pay, PayPal, etc.)
	38% - They are more convenient than going in-store
★ Health and safety is a priority and a huge motivator in using retail apps as a result of the pandemic with app users moving to digital over physical currency.	★ Flexibility and convenience are motivators to app usage.



Retailers need to be continually innovating whether through virtual payments...



Virtual payments

People are already well versed in using apps for retail services, but each user has their own preference when it comes to paying for things. Restricting access to different methods of payment will only push away potential users

- “It can make **payments covering all banks and digital wallets.**”
- “The **free customs duties** for things that shipped from overseas.”
- “The **easy payment methods, for example, can be via e-wallets and payletters** that can be paid at Indomart or Alfamart (making payments easier for those who don't have ATMs) because there are still many payletters that are hard to find in convenience, such as pedia stores that don't have their own payletters unlike Shopee.”



... enhanced safety and security...

Digital safety



Serving customers online and delivering products without seeing them in person means promising high standards of safety. Users are only willing to trust using apps if the outcome of said purchases/sales can be maintained without hindrance

- “It provides **a safety delivery of both the packing and courier system** so that the items is not easily damage.”
- “To **auto block fraudulent accounts or accounts** that cheat customers”
- “The **account security protection** in this app must be **tighen because of many frauds** and illegal account takers.”



... or technological innovation

Tech innovation



With the introduction of VR and AR technology, and Covid preventing usual B&M visits to research products, it would make sense for brands to capitalize on these advancements to demonstrate the multi functionality of apps

- “Yes, **AI feature to try on the products** and see how it looks like on me before buying it.”
- “All electronic retail/commerce apps are almost complete and compete to satisfy customers. Maybe what needs to be **added is log in with fingerprints or faces.**”
- “The **VR feature is as if we came directly to the physical shop** even though our position is outside.”
- “The bonus features in this are still lacking and it **has 3D feature to view products.**”



Disregarding CX improvements will only increase apathy among users looking to leave an app

Deletion Top 10

It has bugs / keeps crashing	44%
It takes up too much memory on my smartphone	42%
I don't use it enough	42%
There were too many ads	39%
It's too difficult to use	32%
It was using too much data from my mobile data plan	31%
I could not find the products I was after	29%
I delete apps and reinstall them when I need them again	27%
I had security and/or privacy concerns	27%
It gives too many push notifications	26%

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

App users will get frustrated by inconveniences that interrupt regular browsing habits. Making access to functions a maze to operate will only dissuade people from learning how to use said tools, and if they can't find what they're after, only further frustrate

Interestingly, about one in four will delete apps but come back to them in the future when the need arises - an opportunity for brands to identify why needs subside and what brings people back? Is it linked to smartphone memory?.

Retail 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

32%
do not delete
retail apps

41%
delete retail apps
less often than every
few months



App Satisfaction:

Key insights and recommendations

Insights



- App satisfaction is strongly correlated with brand recommendation - **94% whom positively rate an app regard themselves as brand promoters**
- **74%** of app users would **prefer a multi-functional singular app** compared to multiple single purpose apps
- Retailers can meet changing consumer needs by providing convenience as well as safety in this time in a pandemic world - **53%** strongly agree they can use them from anywhere and **47%** strongly agree apps keep them safe during Covid

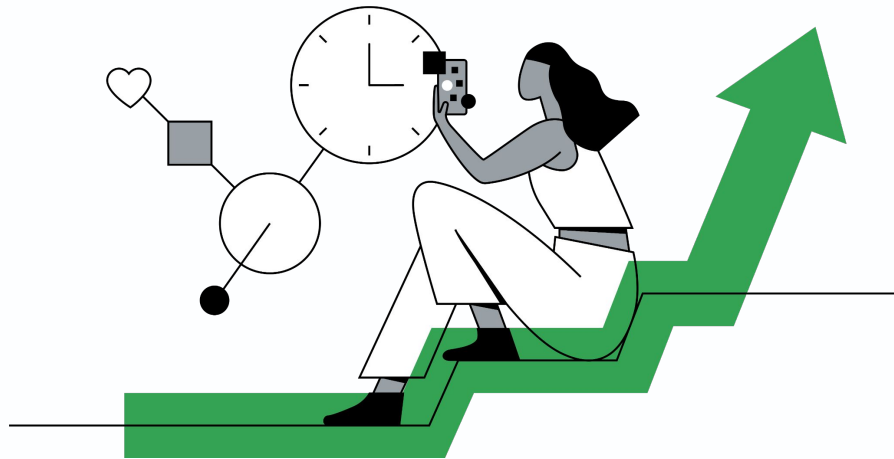
Recommendations to improve brand metrics



- **Get the basics right, consistently**
Ensure critical tasks (e.g. browsing, comparisons, photos) are reliable, seamless & elicit high satisfaction. Bugs, security concerns and excessive ads quickly put users off. Many app users may delete and reinstall if apps take up too much storage space
- **Understand changing consumer needs**
The pandemic has resulted in more consumers shifting to digital - 39% strongly agree they prefer digital payments over cash and 36% strongly agree that apps are safer than cash
- **Innovate to meet consumer needs**
Brands need to keep up with needs by providing increased virtual access, trust in data security and relevant functions that go beyond the current critical tasks



—
Thank you



Think with Google

KANTAR

SIXTH
FACTOR