

Digital Opportunity Scan Core — Overview & Sample


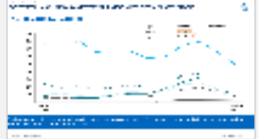

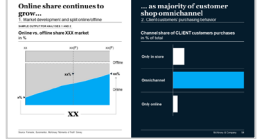

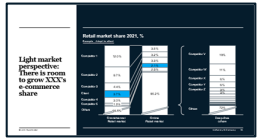





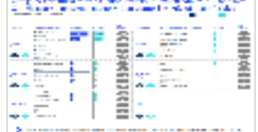
Strictly internal

January 2023



DOS team runs modular suite of digital diagnostics that are outside-in and can be customized to benchmark company-level performance

☐ Focus of this document

Analysis type		What you get?	Sample charts	Time
1 DOS Core		Benchmarking of digital marketing performance including insights on traffic (volume, key sources), SEO/SEM, display, email, site engagement, online purchase funnel, cross-visitation and loyalty		2-5 days
2 OmniNEXT		Growth potential scan that estimates revenue impact attributable to different growth levers like traffic, conversion, AOV, repurchase and return rate. It is most effective for omni-channel consumer retailers, pure players and D2C brands		2-3 weeks
3 RapidNEXT		Holistic answers on eCommerce channel potential, improvement areas and levers by benchmarking client's eCommerce performance across seven dimensions (Digital commerce strategy, Design & user experience, Digital marketing, eRGM & Digital shelf, Digital payments, Planning & fulfilment, Data & technology)		2-5 days
4 Buzz Analytics		Snapshot of customer perception of a company or brand; insights into customer sentiment, key topics of conversation, and pain points across the end-to-end consumer journey. Analyze social media, blogs, forums, survey response, call center transcripts and any other form of unstructured text		3-5 days
5 DOS UX/UI		Insights into desktop and mobile digital customer experience including both operational and strategic enhancements to drive performance improvement		3-5 days
6 Digital Shopper Insights (DSI)		Insights on categories on ecommerce websites including Amazon, Walmart, target etc. with an ability to deep dive at SKU level. Insights on how to win on ecommerce websites including best practices to compete, launch and operate on them		2-3 days

DOS Core can help answer fundamental questions regarding digital strategy along traffic, search and engagement



Traffic analysis

Website function and performance through core traffic metrics {e.g., unique visitors, source traffic, website engagement (bounce rate, time per visit, etc.), and social media referrals}



Search analysis

Digital marketing performance and effectiveness with a focus on paid and organic search (e.g., click-through rate, paid search investment, marketing ROI, cost-per click, top 10 paid/organic keywords, impressions of the client and its competitors)



Clickstream analysis

Deep customer engagement insights:

Conversion funnel – Step by step progress covering each funnel stage from visit to purchase/checkout

Cross-visitation – Who are your core competitors and how serious is the competition. Measures how often a customer visiting the client website also visits the competitors' website in the same browsing session

Loyalty/Retention data – How loyal are your customers and how often do they come back to the website. Measures trips over a 6-month period

DOS Core is an outside-in digital performance assessment diagnostic and benchmarking solution that leverages multiple data sources and provides “Gold Standards” for the main drivers of website performance: Traffic, Search, and Engagement (Clickstream)



Details of types of questions that DOS Core can help answer (1 of 2)



DOS Basic



DOS Advanced



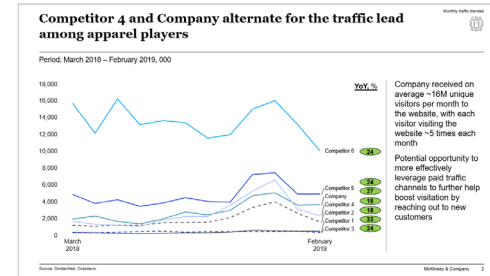
Clickstream

Question answered

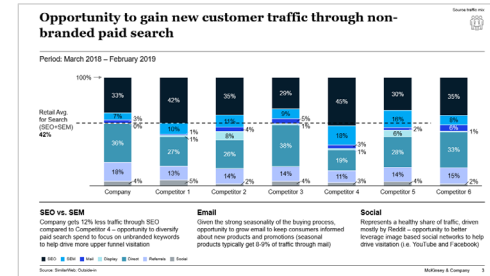


How does clients' website traffic compare with its competitors? How is it positioned in the peer set?

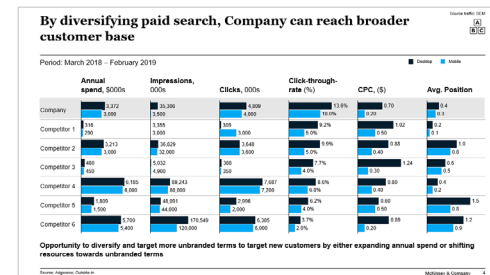
Sample charts



What channel drives the most traffic to the clients' and competitors' website? What should be the source mix strategy of the client?



How does the brand perform on paid search? How effective is its paid search marketing?

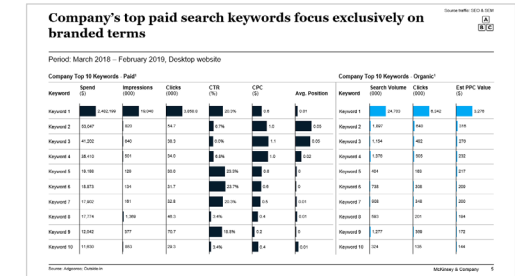


Question answered

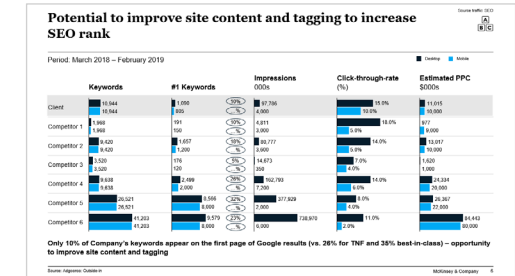


What type of keywords does the brand invest on? What type of keywords do users search for the most to come the brand website?

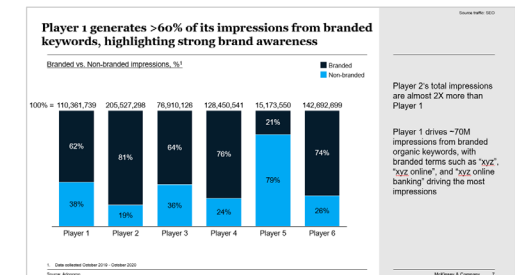
Sample charts



How does Brand perform on search? How frequently and in which slots does it appear?



What is the branded vs. unbranded keyword split of the brand? What is the brand strength?



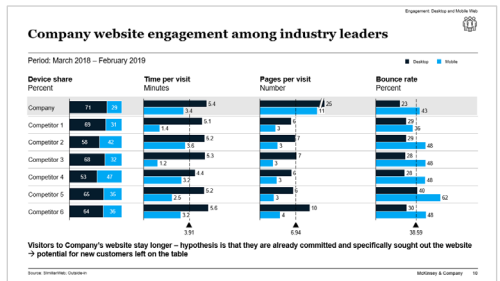
Details of types of questions that DOS Core can help answer (2 of 2)

Question answered



How does Brand.com perform on key experience metrics such as page views per visit, time on site, bounce rate, etc. vs. competition?

Sample charts

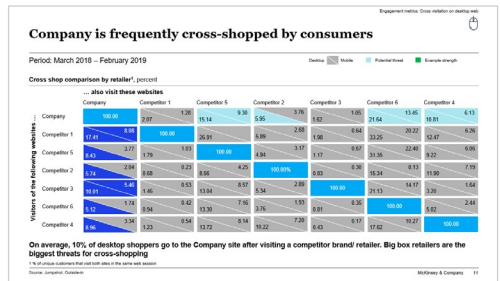


Question answered

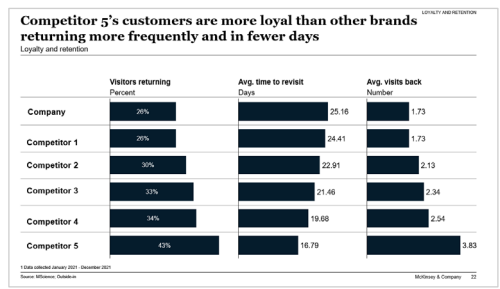


With which competitor websites, does the brand's visitors most frequently cross-visit?

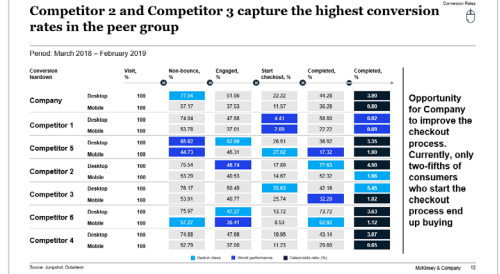
Sample charts



How often do visitors revisit the website and how does loyalty/retention look like?



What is the clients' conversion rate as compared to the competitors' or the industry?



Our “A” team with distinctive global experience

Global leaders



Lars Fiedler
Partner
(Germany)



Oliver Ehrlich
Partner
(Germany)



Abhishek Sharma
Solution AP
(USA)

Americas



Nick Deadrick
Solution Manager
(USA)



Andy Suslavich
Specialist
(USA)



Luis Leiva
Analyst
(Costa Rica)



Asia



Aashray Gulati
Specialist
(India)



Niyati Wadhawan
Analyst
(India)



Stuti Sharma
Jr. Analyst
(India)

Europe



Maddy Le Saux
Sr. Analyst
(Poland)



Mihaela Moustakova
Sr. Analyst
(Portugal)



Pedro
Analyst
(Portugal)



Harshal Dali
Jr. Analyst
(India)

The most effective way of working with the DOS team

Remote functioning DOS team can work remotely and can reach client site to run workshops

2 days typical turn around time



Reach out/ Have a scoping call

Initial discussion call between CST, DOS team and potentially client

- CST can reach out to the team at the email **DOS_Team@mckinsey.com**
- CST and DOS team to connect over a call to align on analysis scope and approach, including competitors and geographies
- CST and DOS team to agree on module, timeline and pricing



Conduct the analyses

DOS team conducts the analysis (**2 business days** for the base analysis)

CSTs can make changes including add/subtract websites for any DOS analysis for the first half-a-day from kick-off



Share tailored report

DOS team shares the output and sets up a call with the CST

Team answers all clarifying questions with regard to the analysis







Jointly interpret and upscale

DOS team to explain results and implications and provide relevant recommendations

Support client presentation when relevant and necessary

Discuss ways to scale/follow up by providing subscription-model for the client

DOS Core product modules and pricing

	<div> <div>Basic</div>  </div>	<div> <div>Advanced</div>  </div>	<div> <div>Clickstream</div>  </div>	<div> <div>App analysis</div>  </div>
What does it include?	Traffic analysis <ul style="list-style-type: none"> Trended traffic Source traffic Website engagement Cross-visitation 	Traffic + Search analysis <ul style="list-style-type: none"> Trended traffic Source traffic Website engagement Search data (SEO and SEM) 	<ul style="list-style-type: none"> Cross shopping Conversion funnel Loyalty/retention 	Mobile app analysis <ul style="list-style-type: none"> App performance App engagement App retention App demographics
What do you get?	Analysis for up to 6 websites including client	Analysis for up to 6 websites including client	Clickstream analysis for selected websites	Analysis for up to 6 mobile apps including client
What does it cost? ¹	3K + Analyst time	4K + Analyst time	1.2K per website	3K + Analyst time
Add-ons ¹	500 for additional websites beyond 6	500 for additional websites beyond 6	1200 for every website	500 for additional apps beyond 6
Sample output	Slide #15 - #19	Slide #15 - #23	Slide #24 - #25	Slide #28 - #31

1. Amount in USD

FAQs

General

Will the DOS analysis cover sub-domains?

Only selected analysis can be performed for subdomains (e.g., we can run website traffic and engagement, but cannot run the other analysis)

Does the analysis cover website data for both mobile and desktop websites?

Yes, we provide analysis for both mobile and desktop.

Are all countries covered?

Most countries are covered under DOS; however, countries that restrict data, e.g., China or the ones that have lower internet/digital presence are not covered. Do check coverage with the DOS team as they tend to have proxy solutions

Can we run DOS for mobile apps?

Yes, we can run a DOS for mobile apps – both iOS and Android

Can the DOS Team make a part/full investment for the analyses?

Unfortunately, we are unable to do so as we have multiple external vendor partnerships, from whom we source the data for the analyses. Bulk of the chargeback consists of this data cost, which is an out-of-pocket expense for the team

Can CSTs run a partial “module” analysis?

- Partial analysis is not possible for the basic and advanced modules
- Partial analysis is possible for the inclusive part. The pricing is lower in such cases; however, the timelines remain the same

What’s the methodology used by the vendors that the DOS team leverages?

Our core partner SimiliarWeb is panel-sized. Please ask the DOS team to provide more details on methodology for other vendors

Retail example: Digital Opportunity Scan helped our client see the importance of strength in digital, and reveals core digital competitors

Situation

Our client was preparing to launch a new vaporizer product, and was looking to understand opportunities for activation in digital. Client marketing spend was ~\$100M yearly, however less than 1% of which was in digital

Approach

We ran the Digital Opportunity Scan in 3 days to benchmark the retailers' digital marketing performance on several dimensions of the digital CDJ covering metrics such as:

- Website traffic
- Paid and organic search
- Cross-visitation and loyalty data



Insights & Impact

We discovered (Insights):

The client's traditional competitive set was much different than their true competitors in the vaporizer space

Not only was client performance behind core vaporizer competitors, but these competitors were far more digitally savvy than the client previously understood

“ ”

The DOS was really critical in helping client leadership understand that they lagged in digital. This led to:

1. Workshops that focused on the implementation of DOS identified opportunity areas
2. Training client team members on digital marketing principles”

– CST, McKinsey

B2B example: Digital Opportunity Scan helped us benchmark client's e-commerce capability versus other parts retailers and rental players

Situation

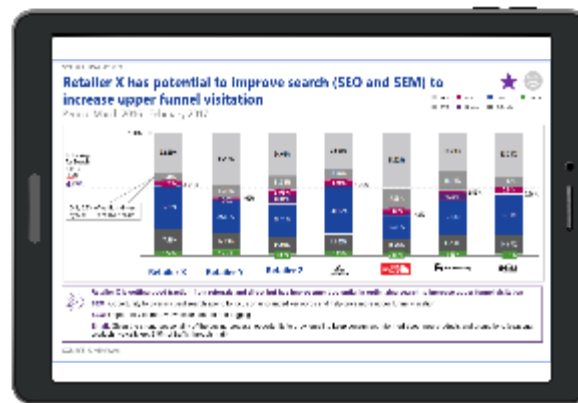
Our client, a global distributor of material handling equipment also involved in selling of parts and service equipment rental, needed some insights on their digital position vis-à-vis competitors. This was during an active engagement for STS growth strategy



Approach

We ran the Digital Opportunity Scan in 3 days to benchmark the retailers' digital marketing performance on several dimensions of the digital CDJ covering metrics such as:

- Website unique visitors
- Paid and organic search
- Website engagement (time per visit, pages per visit, etc.)



Insights & Impact

We discovered (Insights):

DOS helped the client team understand their e-commerce baseline vs. other big equipment rental companies, auto parts retailers etc.

For the client e-commerce was not an immediate fix, yet it was identified as a strategic enabler in the parts and services transformation journey through the DOS analysis

“ ”

The client was really impressed with the level of insights we were able to bring in a short period of time! DOS analysis triggered important discussions with client on how e-commerce can become an important enabler in the long term for their parts and services transformation journey. ”

– CST, McKinsey

CPG example: Digital Opportunity Scan (DOS) helped us execute multiple diligence exercises

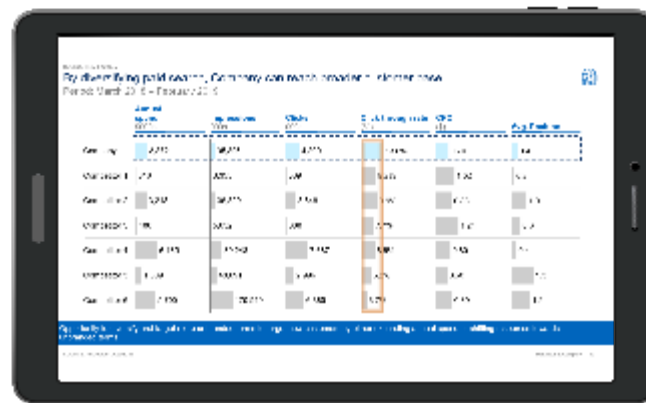
Situation

Our client, a PE firm, needed insight into digital performance of CPG players and benchmark target brands' conversion to that of its major competitors. This was part of a larger diligence

Approach

We ran multiple DOS analyses, including DOS search/traffic and clickstream analysis to benchmark the players' website performance on several dimensions and channels, covering metrics such as:

- Cross-visitation
- Loyalty and retention data
- Source mix
- Website engagement



Insights & Impact

We discovered (Insights):

Client kept on wondering on how it was possible to get such level of insights in a relatively short period time (~2-3 working days)

The analysis resulted in additional follow-up meetings, increasing our influence and relevancy

“ ”

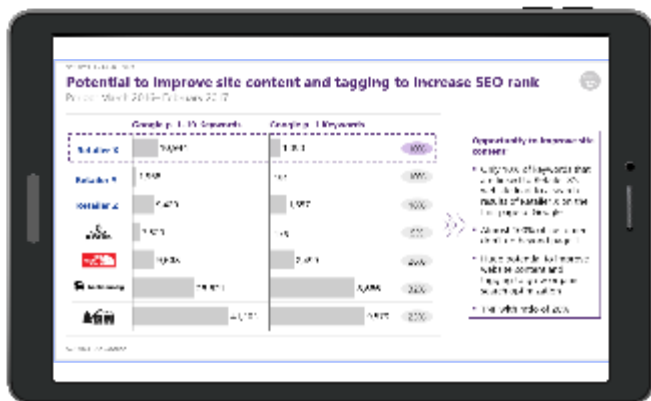
DOS is quick to run, relevant as consumers continue to engage more online, and insightful. The results allow you to identify strengths and weaknesses in a brand. You also get incredible outside-in insights on how brands are doing online with analysis like the purchase funnel. And it takes only a few days, not weeks, so you can start to problem solve immediately.”

– CST, McKinsey

Retail example: Digital Opportunity Scan helped establish presence at a key client in Europe

Situation

Our client, a leading global apparel player, needed some insights on their digital position vis-à-vis competitors. This was not during an active engagement, nor was a part of a formal proposal



Approach

We ran the Digital Opportunity Scan in 5 days to benchmark the retailers' digital marketing performance on several dimensions of the digital CDJ covering metrics such as:

- Website traffic
- Paid and organic search
- Online conversion
- Cross-visitation and loyalty data



Insights & Impact

We discovered (Insights):

Management of the company was intrigued by the digital insights and our ability to generate them so quickly

It was a long-term client, but the results of the DOS analysis led to a shift of conversation towards digital, resulting in follow-up meetings with the client regarding competitor benchmarking

“ ”

DOS analysis led to a shift in conversation towards digital, resulting in follow-up work from the client. It also really enabled the client to think beyond what they had looked at so far – both from a competitive as well as historic performance standpoint – great insights and recommendations!! ”

– CST, McKinsey

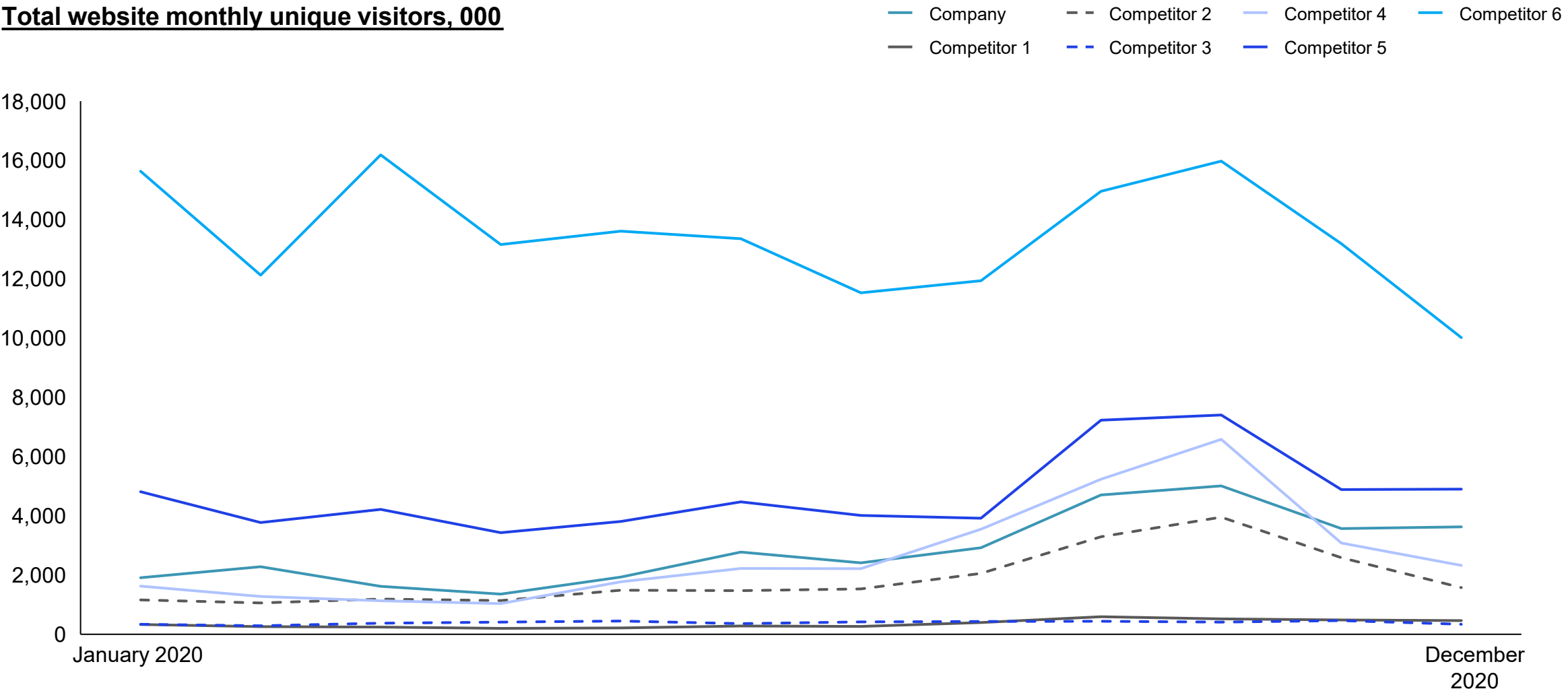
Sample Output – DOS Basic, Advanced, and Clickstream

Competitor 4 and Company alternate for the traffic lead among apparel players

Monthly traffic trended



Total website monthly unique visitors, 000

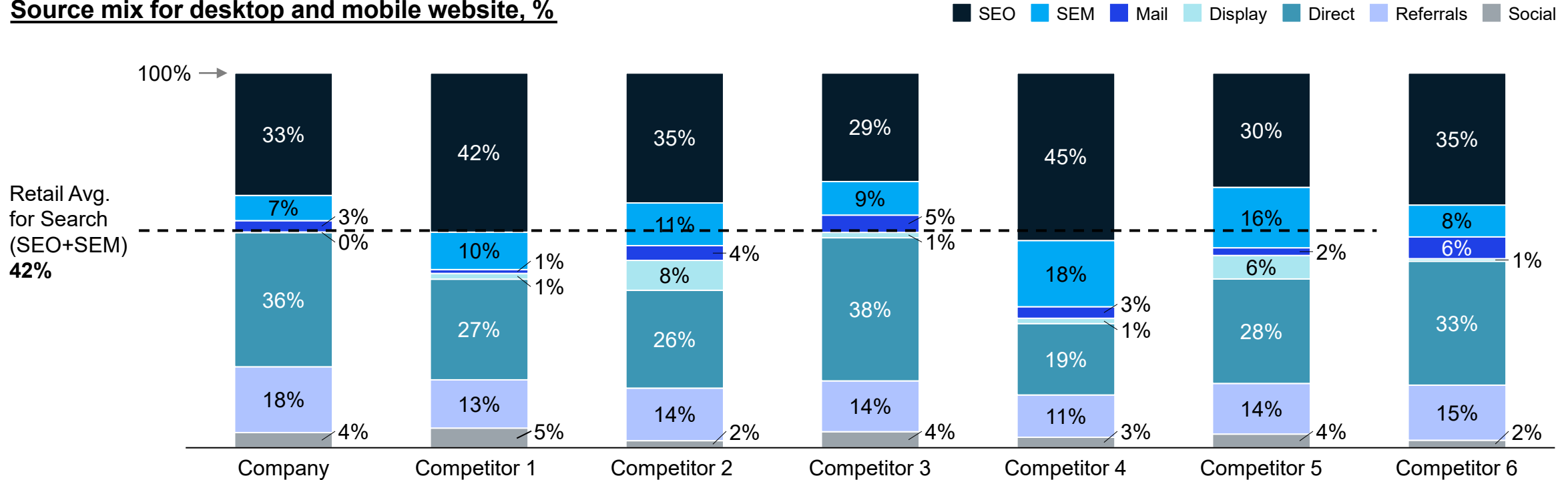


1. Data collected January 2022 – December 2022



Opportunity to gain new customer traffic through non-branded paid search

Source mix for desktop and mobile website, %



SEO vs. SEM

Company gets 12% less traffic through SEO compared to Competitor 4 – opportunity to diversify paid search spend to focus on unbranded keywords to help drive more upper funnel visitation

Email

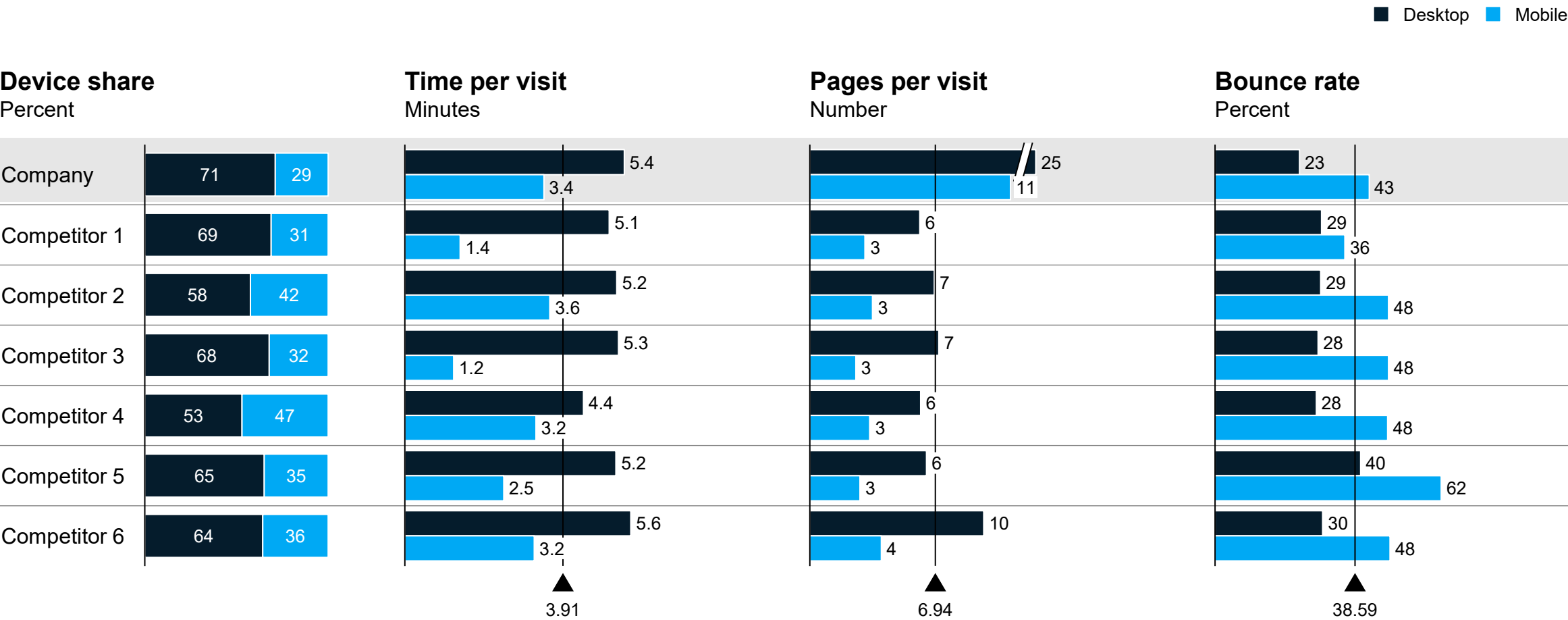
Given the strong seasonality of the buying process, opportunity to grow email to keep consumers informed about new products and promotions (seasonal products typically get 8-9% of traffic through mail)

Social

Represents a healthy share of traffic, driven mostly by Reddit – opportunity to better leverage image based social networks to help drive visitation (i.e. YouTube and Facebook)



Company website engagement among industry leaders



Visitors to Company’s website stay longer – hypothesis is that they are already committed and specifically sought out the website
→ potential for new customers left on the table

1. Data collected January 2022 – December 2022

>80% of the traffic for Client comes from Facebook – Opportunity to leverage Instagram to strengthen their social media presence

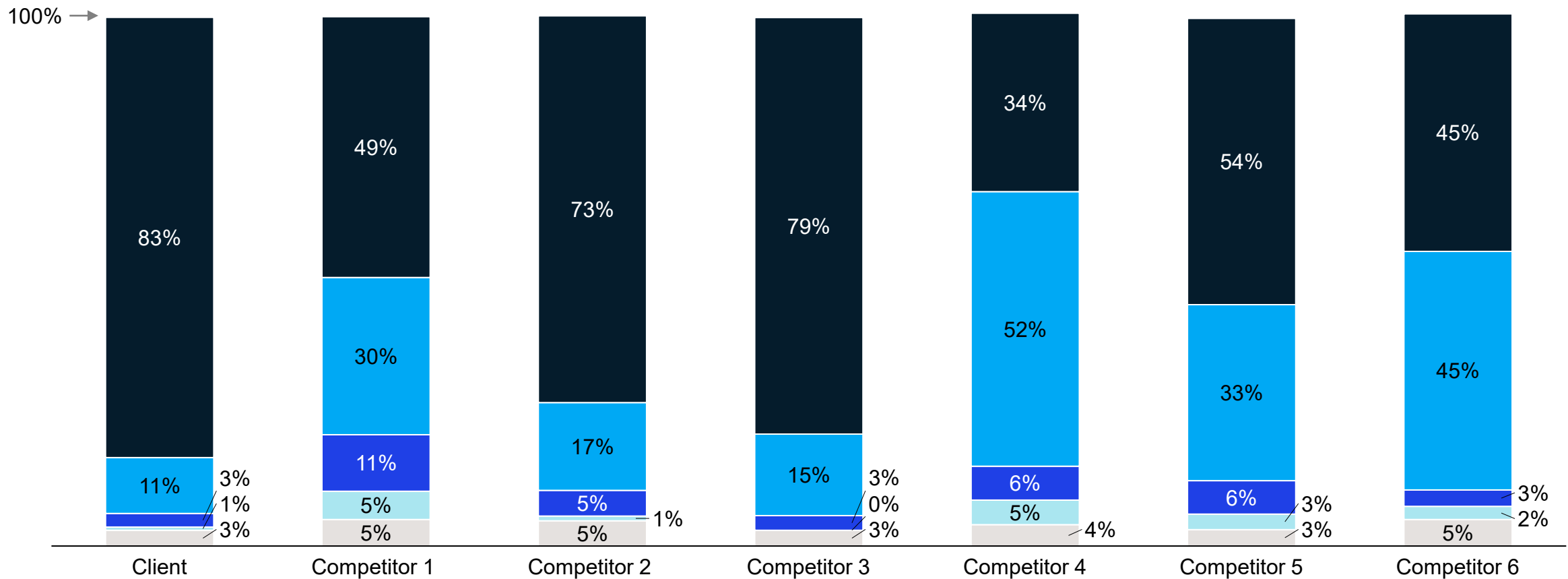
Source traffic mix



DESKTOP WEBSITE VISITS ONLY

Facebook.com youtube.com reddit.com twitter.com Others

Social network referral traffic, %



1. Data collected January 2022 – December 2022



Shopping and news websites refer the most traffic, while visitors primarily exit to payment and career focused sections of the site

DESKTOP WEBSITE VISITS ONLY

Company Referral traffic

Domain	Category	Traffic share
slickdeals.net	Shopping/Coupons	22.91%
dealnews.com	Shopping	7.12%
thewirecutter.com	News/media	4.52%
businessinsider.com	News/media	3.37%
deals.kinja.com	Shopping	2.86%
nsp.org	Sports/Winter Sports	2.19%
outsideonline.com	Recreation and Hobbies/Outdoors	2.05%
Company.narvar.com	Unknown	1.83%
bradsdeals.com	Shopping/Coupons	1.79%
surfline.com	Sports/Water Sports	1.74%

Company Outgoing traffic

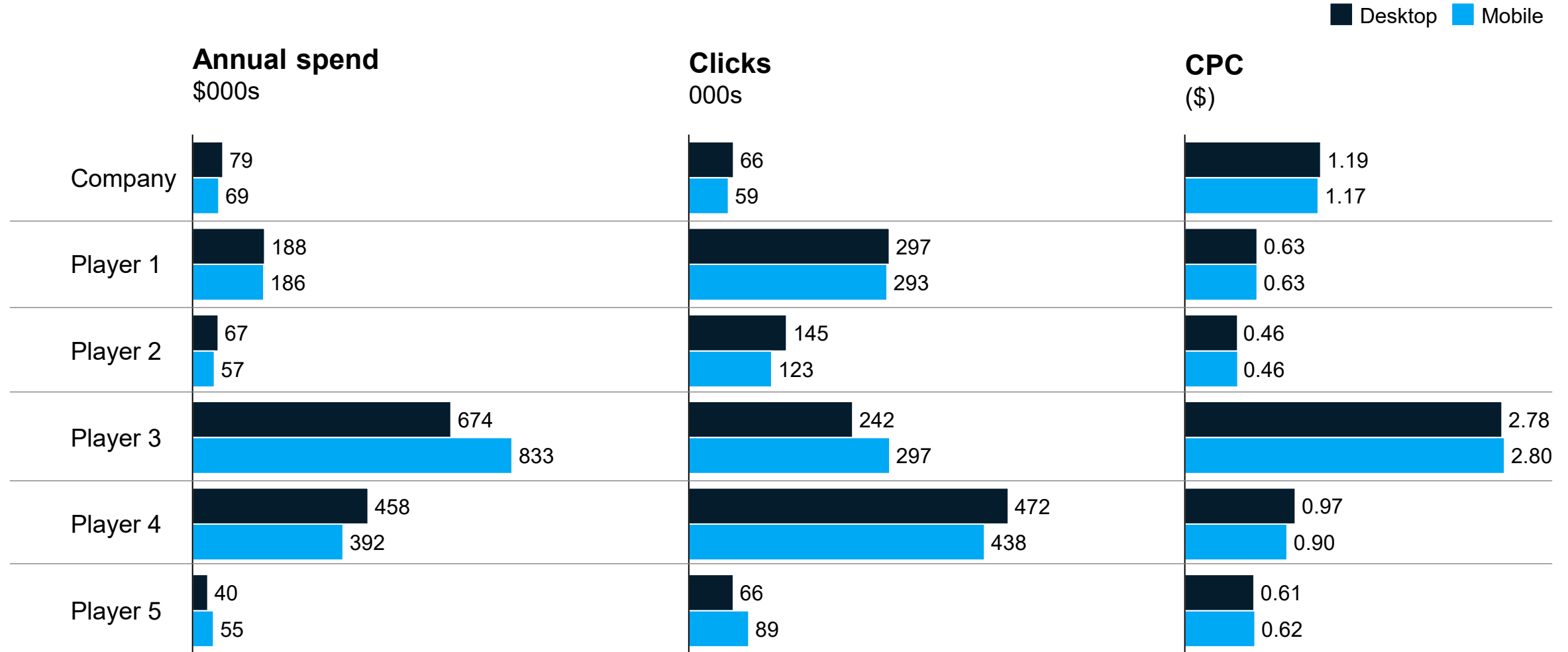
Domain	Category	Traffic share
paypal.com	Payment	23.33%
Company.secure.force.com	Unknown	19.42%
Companyprovisions.com	Retailer	6.76%
en-us.ivendix.com	Unknown	4.4%
Companyworks.com	Retailer	4.24%
Company.wd5.myworkdayjobs.com	Unknown	3.87%
netflix.com	Video	3.59%
facebook.com	Social network	2.71%
instagram.com	Social network	2.54%
thecleanestline.com	People and Society	1.84%

1. Data collected January 2022 – December 2022



By diversifying paid search, Company can reach broader customer base

Paid search spend and performance on desktop and mobile website¹



¹ Data collected January 2022 – December 2022

DESKTOP: Company’s top paid search keywords focus exclusively on branded terms



Client Top 10 Keywords on desktop - Paid¹

Keyword	Spend (\$)	Impressions (000)	Clicks (000)	CTR (%)	CPC (\$)	Avg. Position
Keyword 1	<div><div></div>2,482,199</div>	<div><div></div>19,040</div>	<div><div></div>3,858.8</div>	<div><div></div>20.3%</div>	<div><div></div>0.6</div>	<div><div></div>1</div>
Keyword 2	<div><div></div>53,047</div>	<div><div></div>820</div>	<div><div></div>54.7</div>	<div><div></div>6.7%</div>	<div><div></div>1.0</div>	<div><div></div>1</div>
Keyword 3	<div><div></div>41,202</div>	<div><div></div>640</div>	<div><div></div>38.3</div>	<div><div></div>6.0%</div>	<div><div></div>1.1</div>	<div><div></div>1</div>
Keyword 4	<div><div></div>35,410</div>	<div><div></div>501</div>	<div><div></div>34.0</div>	<div><div></div>6.8%</div>	<div><div></div>1.0</div>	<div><div></div>1</div>
Keyword 5	<div><div></div>19,198</div>	<div><div></div>129</div>	<div><div></div>30.0</div>	<div><div></div>23.3%</div>	<div><div></div>0.6</div>	<div><div></div>1</div>
Keyword 6	<div><div></div>18,873</div>	<div><div></div>134</div>	<div><div></div>31.7</div>	<div><div></div>23.7%</div>	<div><div></div>0.6</div>	<div><div></div>1</div>
Keyword 7	<div><div></div>17,902</div>	<div><div></div>161</div>	<div><div></div>32.8</div>	<div><div></div>20.3%</div>	<div><div></div>0.5</div>	<div><div></div>1</div>
Keyword 8	<div><div></div>17,774</div>	<div><div></div>1,369</div>	<div><div></div>46.3</div>	<div><div></div>3.4%</div>	<div><div></div>0.4</div>	<div><div></div>1</div>
Keyword 9	<div><div></div>12,042</div>	<div><div></div>377</div>	<div><div></div>70.7</div>	<div><div></div>18.8%</div>	<div><div></div>0.2</div>	<div><div></div>1</div>
Keyword 10	<div><div></div>11,630</div>	<div><div></div>853</div>	<div><div></div>29.3</div>	<div><div></div>3.4%</div>	<div><div></div>0.4</div>	<div><div></div>1</div>

Client Top 10 Keywords on desktop - Organic¹

Keyword	Search Volume (000)	Clicks (000)	Est PPC Value (\$)
Keyword 1	<div><div></div>24,703</div>	<div><div></div>6,342</div>	<div><div></div>3,276</div>
Keyword 2	<div><div></div>1,897</div>	<div><div></div>640</div>	<div><div></div>316</div>
Keyword 3	<div><div></div>1,154</div>	<div><div></div>482</div>	<div><div></div>276</div>
Keyword 4	<div><div></div>1,376</div>	<div><div></div>505</div>	<div><div></div>232</div>
Keyword 5	<div><div></div>404</div>	<div><div></div>163</div>	<div><div></div>217</div>
Keyword 6	<div><div></div>738</div>	<div><div></div>308</div>	<div><div></div>209</div>
Keyword 7	<div><div></div>908</div>	<div><div></div>348</div>	<div><div></div>200</div>
Keyword 8	<div><div></div>593</div>	<div><div></div>201</div>	<div><div></div>194</div>
Keyword 9	<div><div></div>1,277</div>	<div><div></div>369</div>	<div><div></div>172</div>
Keyword 10	<div><div></div>324</div>	<div><div></div>135</div>	<div><div></div>144</div>

¹ Data collected January 2022 – December 2022

MOBILE: Company’s top paid search keywords focus exclusively on branded terms



Client Top 10 Keywords on mobile - Paid¹

Keyword	Spend (\$)	Impressions (000)	Clicks (000)	CTR (%)	CPC (\$)	Avg. Position
Keyword 1	2,482,199	19,040	3,858.8	20.3%	0.6	1
Keyword 2	53,047	820	54.7	6.7%	1.0	1
Keyword 3	41,202	640	38.3	6.0%	1.1	1
Keyword 4	35,410	501	34.0	6.8%	1.0	1
Keyword 5	19,198	129	30.0	23.3%	0.6	1
Keyword 6	18,873	134	31.7	23.7%	0.6	1
Keyword 7	17,902	161	32.8	20.3%	0.5	1
Keyword 8	17,774	1,369	46.3	3.4%	0.4	1
Keyword 9	12,042	377	70.7	18.8%	0.2	1
Keyword 10	11,630	853	29.3	3.4%	0.4	1

Client Top 10 Keywords on mobile - Organic¹

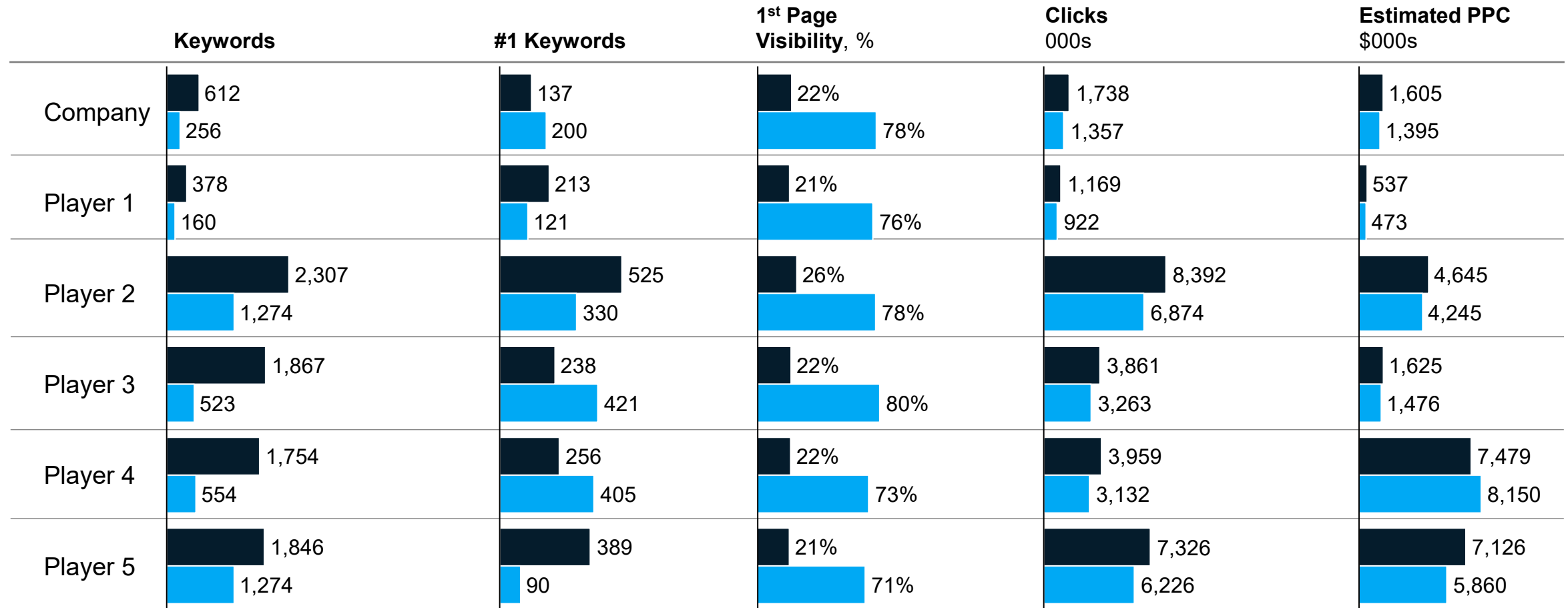
Keyword	Search Volume (000)	Clicks (000)	Est PPC Value (\$)
Keyword 1	24,703	6,342	3,276
Keyword 2	1,897	640	316
Keyword 3	1,154	482	276
Keyword 4	1,376	505	232
Keyword 5	404	163	217
Keyword 6	738	308	209
Keyword 7	908	348	200
Keyword 8	593	201	194
Keyword 9	1,277	369	172
Keyword 10	324	135	144

1 Data collected January 2022 – December 2022

SEO Overview

Organic search reach and visibility performance on desktop and mobile website1

■ Desktop ■ Mobile



1. Data collected January 2022 – December 2022



Company is frequently cross-shopped by consumers

Period: January 2022 – December 2022

Cross shop comparison by retailer¹, percent

		... also visit these websites						
		Company	Competitor 1	Competitor 5	Competitor 2	Competitor 3	Competitor 6	Competitor 4
Visitors of the following websites ...	Company	100%	3.4%	7.8%	7.8%	7.8%	7.8%	7.8%
	Competitor 1	4.5%	100%	7.8%	7.8%	7.8%	7.8%	7.8%
	Competitor 5	3.4%	3.4%	100%	7.8%	7.8%	7.8%	7.8%
	Competitor 2	7.8%	7.8%	7.8%	100%	7.8%	7.8%	7.8%
	Competitor 3	8.9%	8.9%	8.9%	8.9%	100%	7.8%	7.8%
	Competitor 6	8.0%	7.8%	6.8%	5.8%	5.8%	100%	7.8%
	Competitor 4	9.5%	9.5%	9.5%	9.5%	9.5%	9.5%	100%

On average, 10% of shoppers go to the Company site after visiting a competitor brand/ retailer. Big box retailers are the biggest threats for cross-shopping

1. % of unique customers that visit both sites in the same web session



Competitor 2 and Competitor 3 capture the highest conversion rates in the peer group

Period: January 2022 – December 2022

Best-in class

Worst performance

Sales/visits ratio (%)

Conversion teardown		Visit, %	Non-bounce, %	Start checkout, %	Completed, %	Conversion rate, %
			×	×	×	−
Company	Desktop	100	77.54	22.22	44.28	3.90
	Mobile	100	57.17	11.57	36.28	0.90
Competitor 1	Desktop	100	74.04	4.41	58.80	0.92
	Mobile	100	53.78	2.09	22.22	0.09
Competitor 5	Desktop	100	65.62	26.51	36.92	3.35
	Mobile	100	44.73	27.82	17.32	1.00
Competitor 2	Desktop	100	75.54	17.89	77.63	4.90
	Mobile	100	53.29	14.67	52.32	1.66
Competitor 3	Desktop	100	76.17	33.63	42.16	5.45
	Mobile	100	53.91	25.74	32.20	1.82
Competitor 6	Desktop	100	75.97	13.72	73.72	3.63
	Mobile	100	57.27	8.53	62.92	1.12
Competitor 4	Desktop	100	74.88	19.95	43.14	3.07
	Mobile	100	52.79	11.23	29.80	0.65

Opportunity for Company to improve the checkout process. Currently, only two-fifths of consumers who start the checkout process end up buying

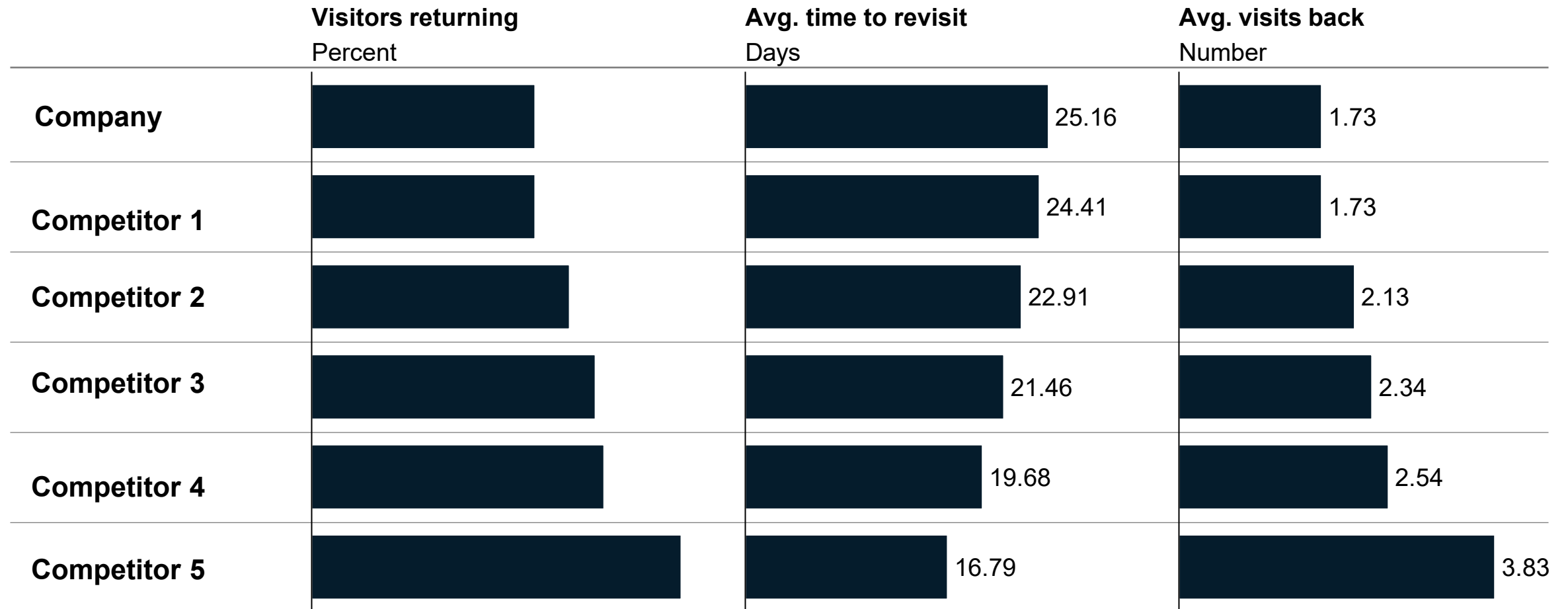
1. Data collected January 2022 – December 2022

Source: MScience; Outside-in



Competitor 5's customers are more loyal than other brands returning more frequently and in fewer days

Loyalty and retention



1. Data collected January 2022 – December 2022

Glossary of key terms used in this diagnostic

Web traffic

Visitors	Total # of monthly visitors
Visit duration	Average time spent on the site
Page Visits	Average number of pages viewed by a visitor
Bounce rate	% of visitors who leave the site without engaging with any content

Source traffic

SEO	Traffic originating from a search result that was not paid for by an advertiser
SEM	Refers to any search process where results are dictated by payment from advertisers
Display	Banners/video ads appearing on a website
Referrals	Visitors referred by links on other website
Mail	Traffic from links/ads within emails
Social	Any traffic from a social network
Direct	Visitor typed in the web address into a browser

Search and Display

Spend	Amount spent on paid search advertisements
Impressions	Number of times an ad was served
Cost per impression (CPM)	Spent divided by impression to determine the cost of reaching a single person
Clicks	The number of times a click was made on the ad
Click Through Rate (CTR)	The number of times a click was made on the ad divided by the total impressions
Cost per click (CPC)	Amount of money the advertiser spent for each click made on the ad
Avg. position	Average placement of an ad found on the first page of sponsored listings. the top ad in the premium placement box would be given the position 1 the second would be 2
Search visits	Total number of website visits generated by search (paid and organic)
Search volume	Monthly average number of searches performed for the keyword in question, in google, in the selected country, for the last 12 months
# Keywords	All keywords that drive the company in showing up on the search results (organic and paid)
#1 Keywords	Organic search keywords that appear on the first page of search results

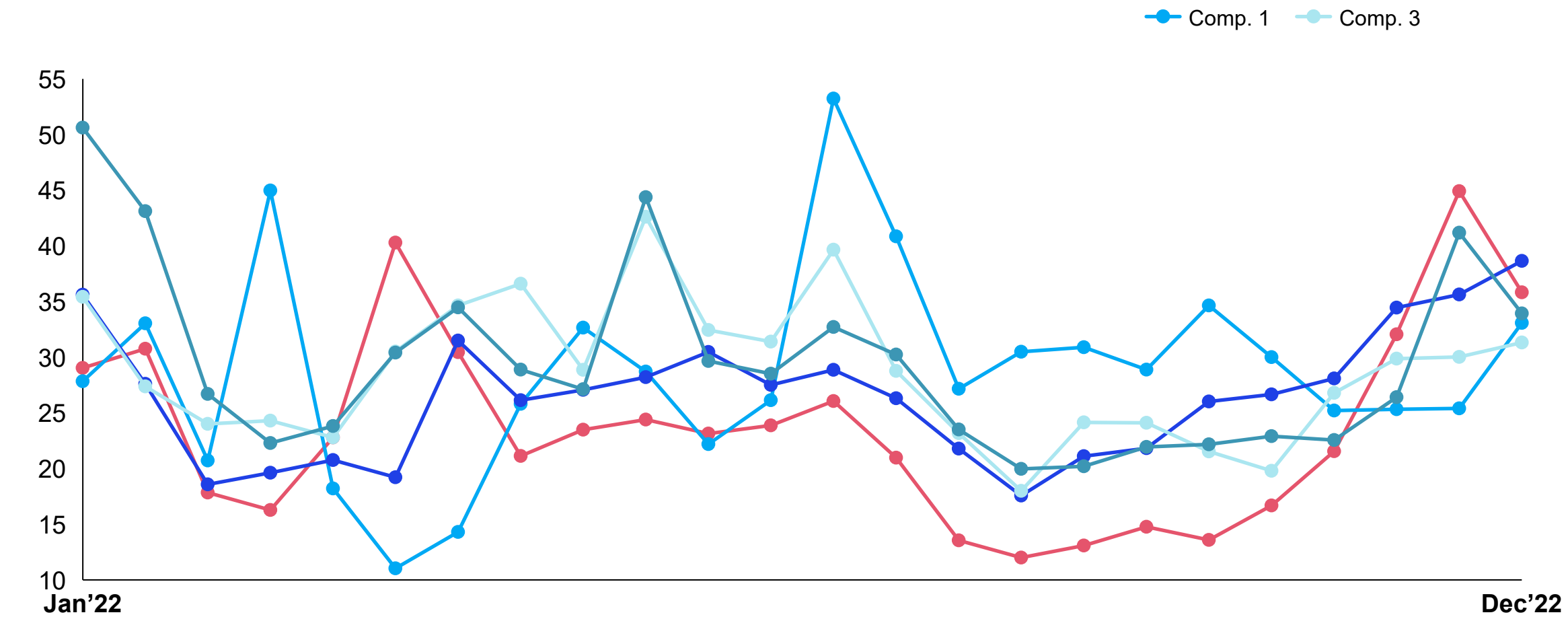
Clickstream

Non-bounce	% of traffic that does not leave the site immediately
Add to cart	Add a product to the shopping cart
Start checkout	Begin the checkout or application process
Conversion	Complete the checkout or application

Sample Output – App analysis

Company's app downloads peaked around Sept'22, resulting in the app leading the peer set in monthly downloads

Total mobile app downloads on iOS and Play Store trended monthly, 000¹

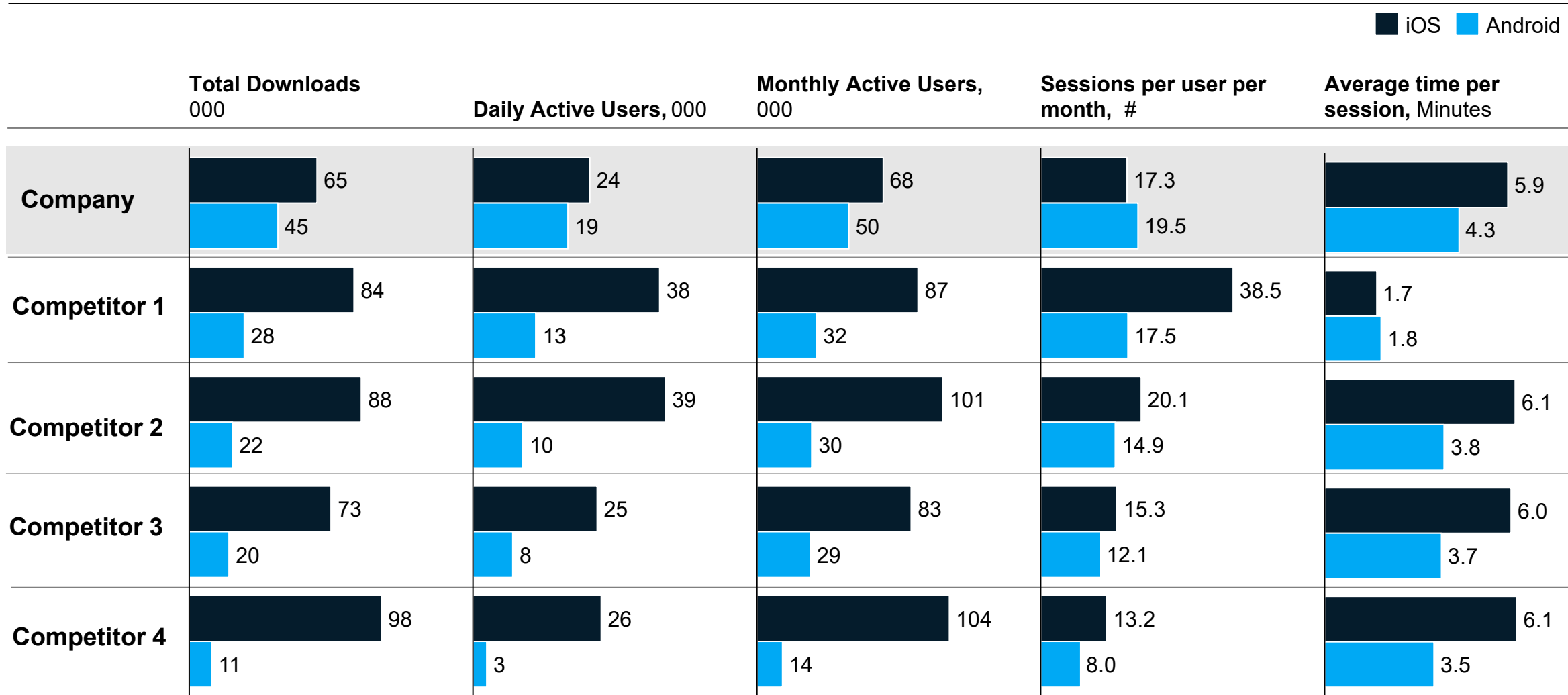


1. Data collected January 2022 – December 2022

iOS tends to have higher usage vs. Android, with competitor 2 leading

iOS app performance

App engagement



1. Data collected January 2022 – December 2022

Leaders and challengers achieve similar results in the mobile app open rates in the first days after the download



Share of customers who opened the app after downloading, %
Measured from the day app was installed with Day 1 being a day of installation; data collected January 2022 – December 2022

	Day 1	Day 3	Day 7	Day 14	Day 30
Company	78	46	26	24	24
Competitor 1	74	43	26	23	21
Competitor 2	75	46	26	24	21
Competitor 3	78	45	26	24	22
Competitor 4	77	45	26	24	19
Competitor 5	80	42	20	18	19

1. Data collected January 2022

Source: Apptopia

~**20%** of people who downloaded the app kept using it after 30 days

~**50%** of customers stopped using the app within the first 30 days

As a comparison only **10%** of telco operators customers keep using the app after 30 days

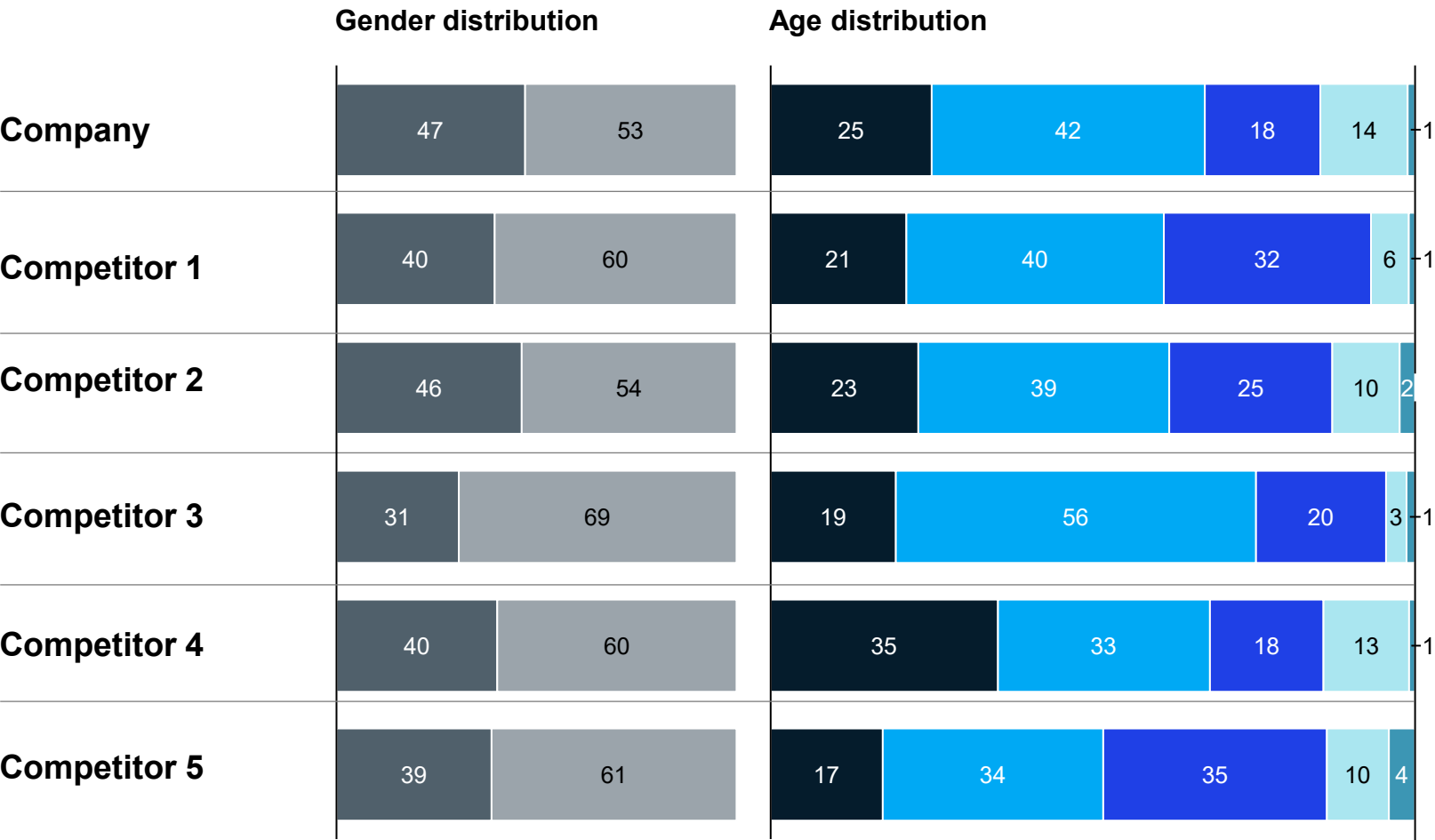
Leaders have similar demographics pattern, Player 4 and 5 with higher share of customers <35 years



THIS SLIDE ONLY AVAILABLE FOR US

Female Male

18-24 25-35 35-44 45-54 55+



Player 4 with substantial gender lag as over two-thirds of users are Male

Player 4 and Player 6 with lowest share of youngest (18-24) customers

App demographics, data collected January 2022 – December 2022