

The App Attention Index 2021: Who takes the rap for the app?

How applications became a lifeline to normality, and the need for businesses to deliver the 'total application experience'



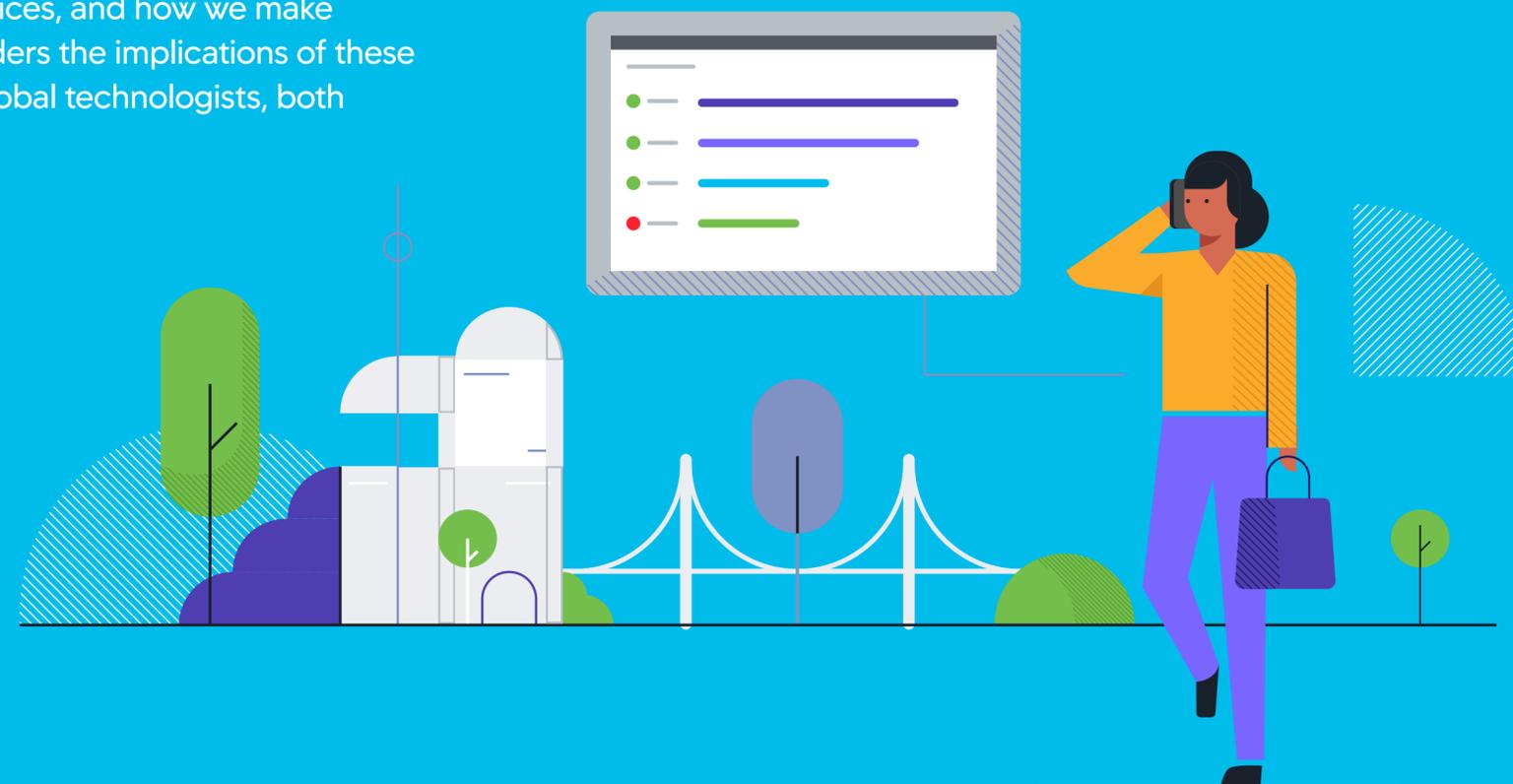
About this report

As people navigate their way through the pandemic, they find themselves increasingly reliant on applications and digital services in almost every aspect of their lives.

The AppDynamics App Attention Index 2021 explores major trends in how consumers are engaging with these services, their changing behaviors and expectations.

This latest App Attention Index – the fourth in the series – examines the critical role that digital experiences have played in our lives since the start of 2020. It reveals how this sudden and total reliance on applications and digital services has intrinsically altered the way we engage with brands, how we consume services, and how we make purchasing decisions. It considers the implications of these changes for businesses and global technologists, both today and in the future.

The research included interviews with more than 13,000 consumers, including 2,000 interviews in both the United States and the United Kingdom, and 1,000 interviews in Australia, Canada, France, Germany, India, Japan, Russia, Singapore and the United Arab Emirates. The research was conducted by Insight Avenue in June 2021.



Executive Summary

Applications have become a lifeline to normality

For the last 18 months, digital services have been a lifeline to normality for people in every corner of the world.

As people adapted to the impact of the pandemic, consumers turned to applications and digital services during the most challenging period of our lifetime, enabling them to stay connected with loved ones, to work and learn, to access critical healthcare and public services, and to keep entertained and informed.

Many brands have innovated at speed to launch new digital services which have offered convenience, comfort and enjoyment to people in these difficult times – something that consumers have recognized and greatly appreciated.

Brands have shown what world-class applications can and should look like in 2021 – in terms of performance, security and simplicity. And as a result, consumers are realizing that they now have a new level of choice in how they go about their lives – how they shop, work, travel and socialize – even once restrictions on movement and gatherings have passed.

Applications have enabled people to try new things, engage with new brands and juggle their work and life commitments more easily. It's not surprising, therefore, that consumers intend to maintain and even increase their use of applications in the future.

Who takes the rap for the app? Consumers blame the brand when things go wrong

Our reliance on digital services has reached new, previously unimaginable heights during the pandemic. People are using more applications, more often, across more areas of their lives.

And with this reliance has come soaring expectation for flawless and engaging digital experiences. Consumers expect applications to be more reliable, secure and personalized to their own individual needs and preferences than they did prior to the pandemic.

But consumers continue to experience problems when using digital services and, alarmingly for brands, they now automatically blame the application – and the brand behind it – when things go wrong.

It doesn't matter whether the issue is within the application itself – such as pages loading slowly, poor response times, downtime, or security failures; or whether it's due to external factors outside the application – such as bad internet connectivity, 4G/5G mobile network issues, slow payment gateways or technical issues with third party plug-ins. To the

consumer, there is no distinction between the two. When it comes to 'who takes the rap for the app?', most fingers point straight at the brand.

And when these problems occur, people are now more likely to act decisively – switching to another provider, sharing their negative experiences and deleting the application.

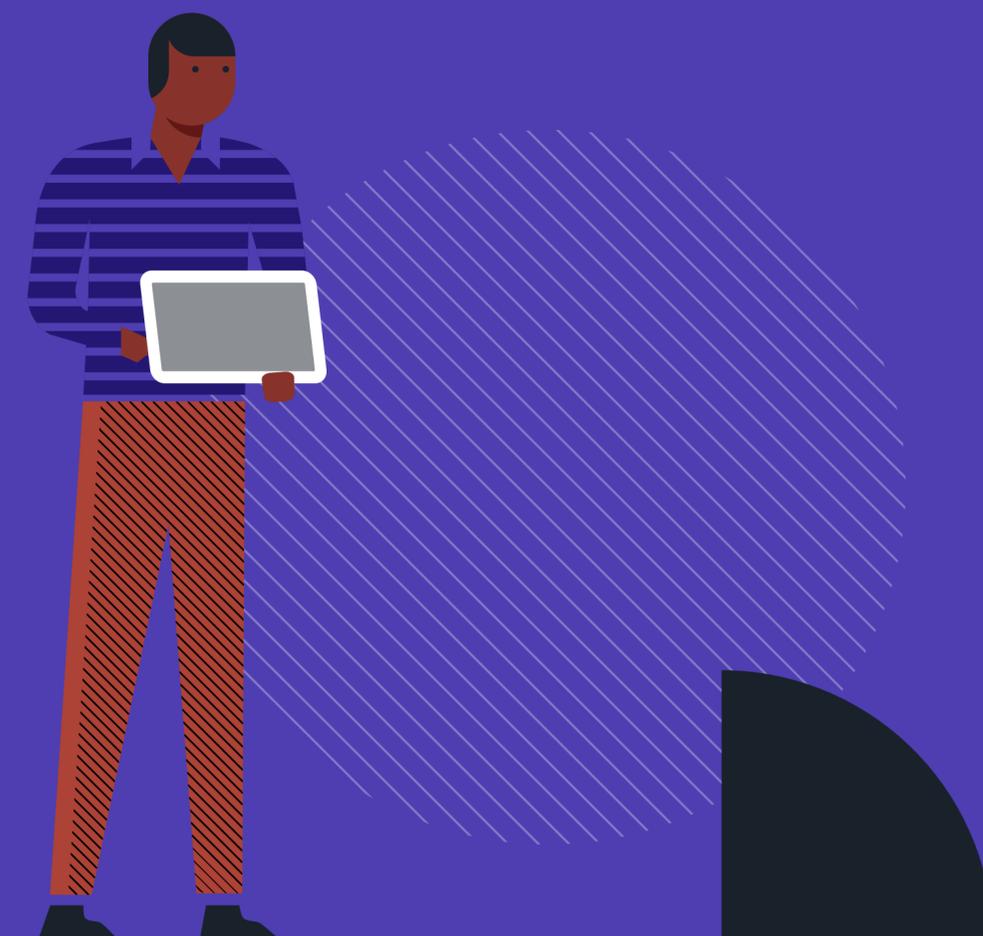
Brands only have one chance to deliver the 'total application experience'

Consumers are looking for the 'total application experience' – a high-performing, reliable, digital service which is simple, secure, helpful and fun to use. This is the new benchmark for all digital services.

Brands need to recognize that the bar has been raised when it comes to digital experience and that the stakes have risen too. Critically, the onus is now on the brand to fix performance issues and meet those consumer expectations.

The majority of consumers state that brands have just one shot to impress them and if their digital service does not perform, they won't use them again.

This is a moment of reckoning for brands. Unless they can consistently deliver world-class digital experiences, then they risk seeing more than half of their customers walk away. And in an ever more competitive market, it won't be easy to win them back.



Applications deliver positive impact to all during the pandemic

The pandemic has changed our lives immeasurably. While every country has endured a very different journey through the pandemic, and communities have all faced their own unique challenges over the past 18 months, one thing is true for people all over the world; almost all of our normal routines and behaviors were suddenly put on hold in a socially distanced world.

And as the future remained uncertain – and lockdown restrictions extended from weeks into months and then beyond a year – consumers relied on technology more than ever before as a way to retain some sense of normality.

In some cases, this has been through necessity – to obtain essential groceries and access healthcare. Digital services have enabled us to adapt working practices that had long been grounded in commutes, offices and shared workspaces, and allowed schoolchildren to continue to learn away from the classroom.

But digital services have also helped people to fulfil their own emotional needs, to feel connected to friends and family, to check in on the vulnerable, welcome new family members and, sadly, say goodbye to others. For most people, applications and digital services have offered a chance to cling to some level of social interaction – the family video calls, the virtual cocktail hours, the online quizzes.

And it isn't just the young or 'digitally-able' who have embraced technology as a way to cope during the pandemic. People of all ages, across all demographics and geographies, have turned to digital services and felt the unique benefits of a digital alternative to their normal way of life.

84%

of people report that digital services have had a positive impact on their lives during the pandemic, enabling them to get through this challenging period and to cope and function in most areas of their lives.



Digital services: A lifeline to normality

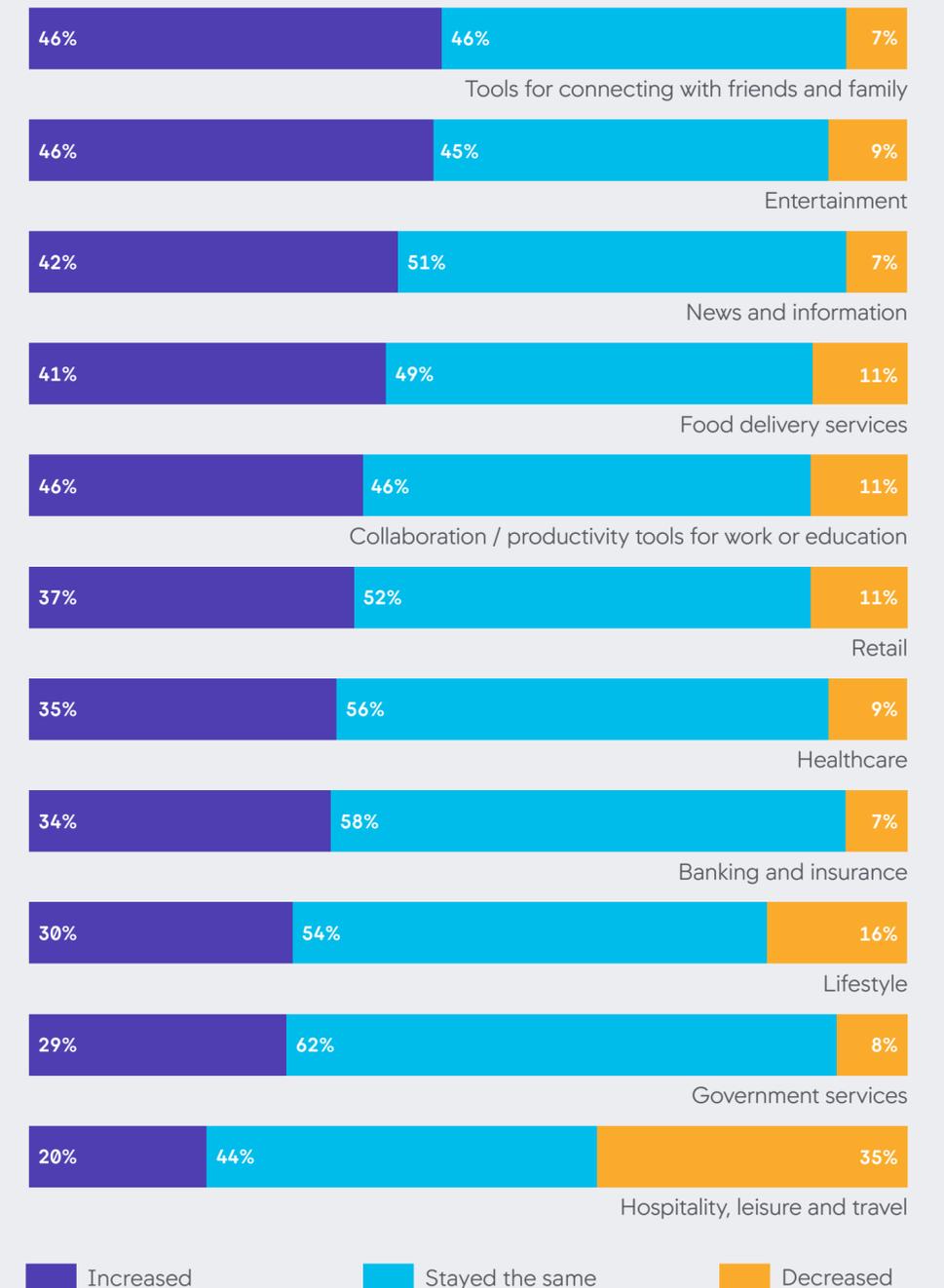
The number of applications that people are using on a daily basis has jumped by a staggering 30% compared with two years ago.

And consumers are relying on a far broader range of digital services than in 2019, from messaging tools, video calls and social media to connect with loved ones, to music and video streaming, online gaming and podcasts to stay entertained.

People are relying more on food delivery services, on collaboration and productivity tools for work and education, and on applications to access healthcare and public services. And, interestingly, they've become more reliant on digital services for hobbies, lifestyle pursuits such as fitness classes, and worship.



How reliance on digital services has increased during the pandemic



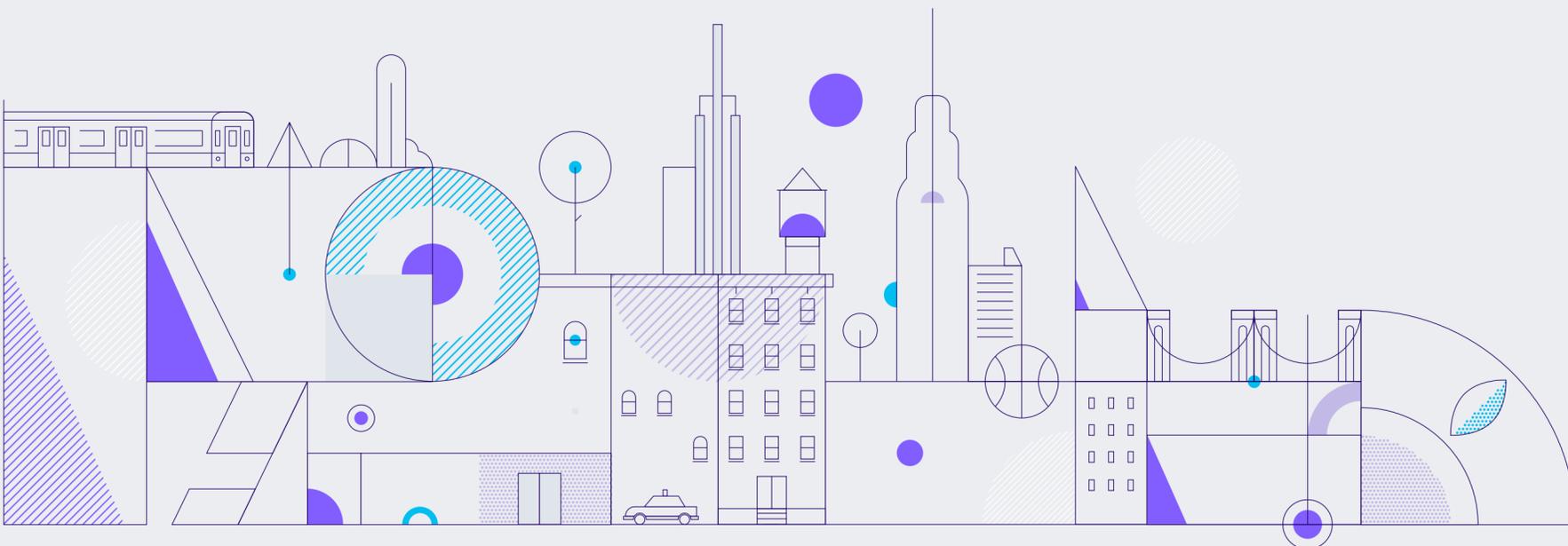
If frontline workers have been the heroes of the pandemic, then applications have been our lifeline to normality. Day to day, we've relied on digital services for almost everything – so much so that it's difficult to comprehend how society would have navigated the last 18 months without them.

85%

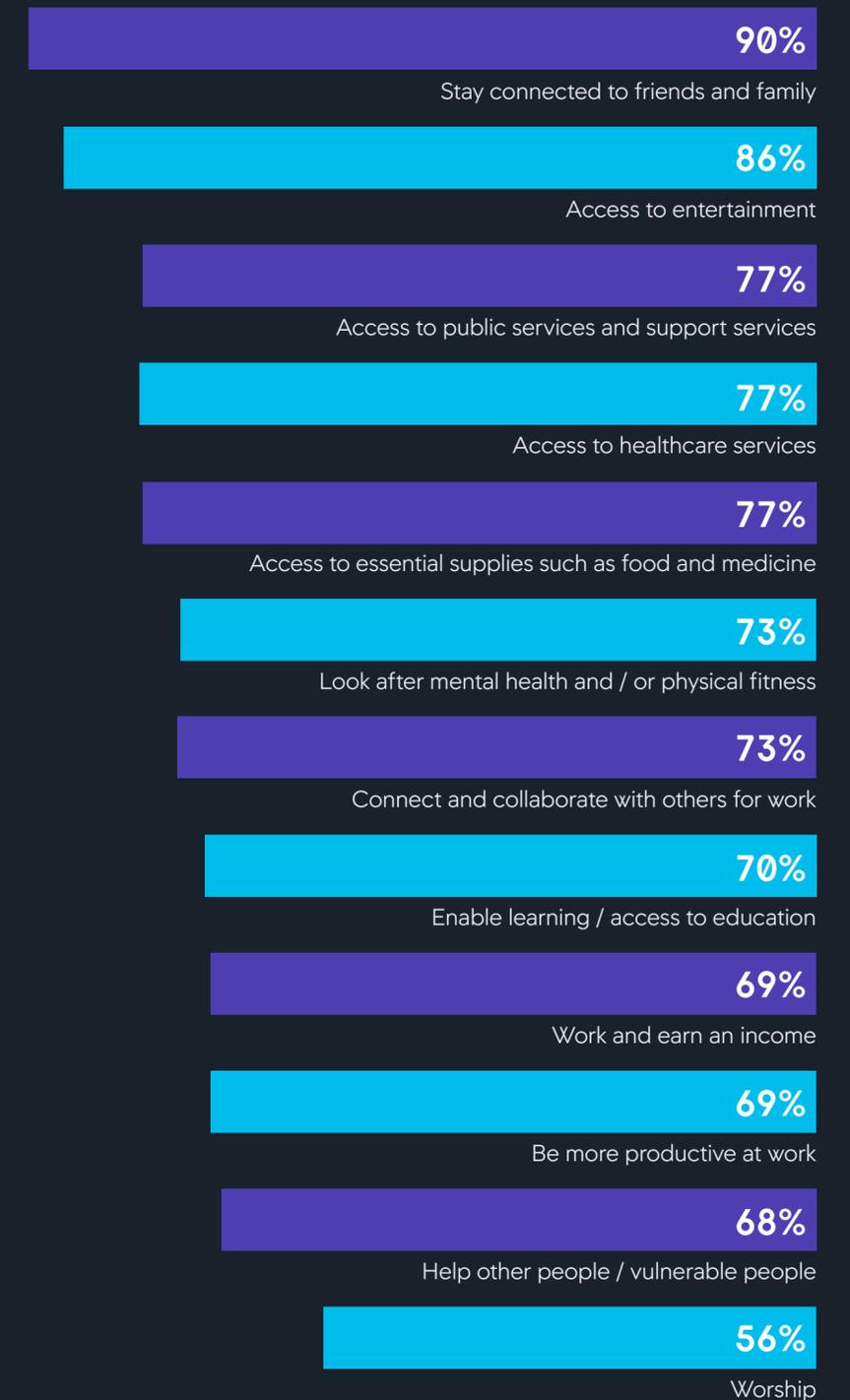
of people say applications and digital services have become a critical part of how they go about their lives over the last 18 months

75%

say applications and digital services have been a lifeline to some kind of normality during the pandemic



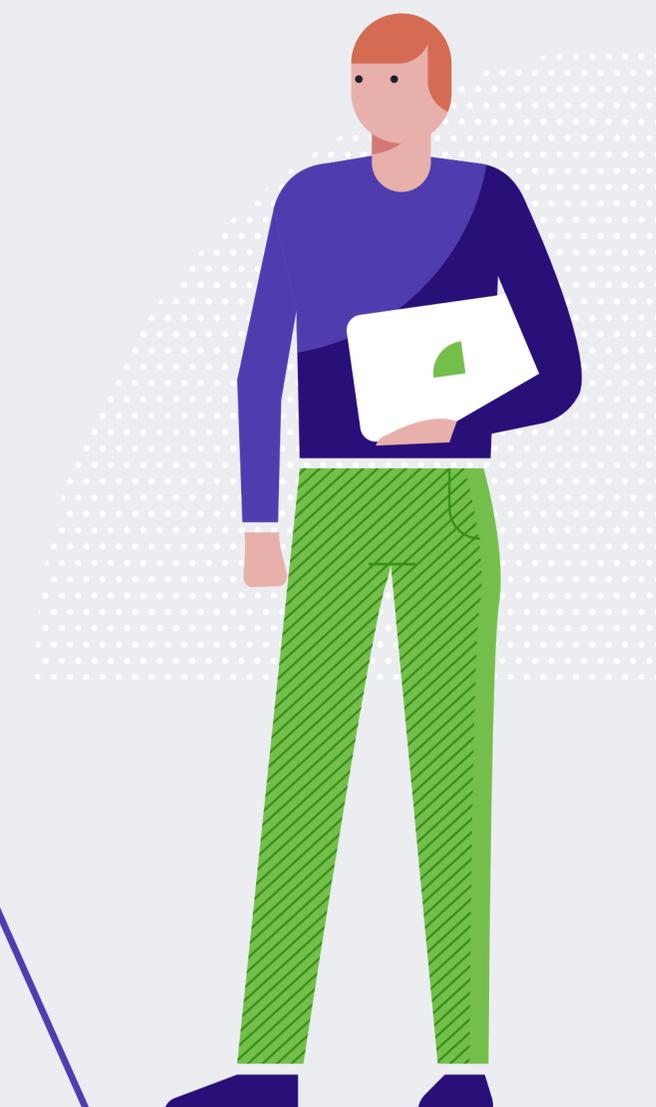
Ways that access to digital services have helped people since beginning of 2020



Top ten digital service types used on a regular basis

- 1 Tools for connecting with friends and family
- 2 Banking and insurance
- 3 News and information
- 4 Retail
- 5 Entertainment
- 6 Government services
- 7 Collaboration / productivity tools for work or education
- 8 Food delivery services
- 9 Healthcare
- 10 Lifestyle

Changing consumer needs through the pandemic have led to people reprioritizing the digital services they are using most regularly.



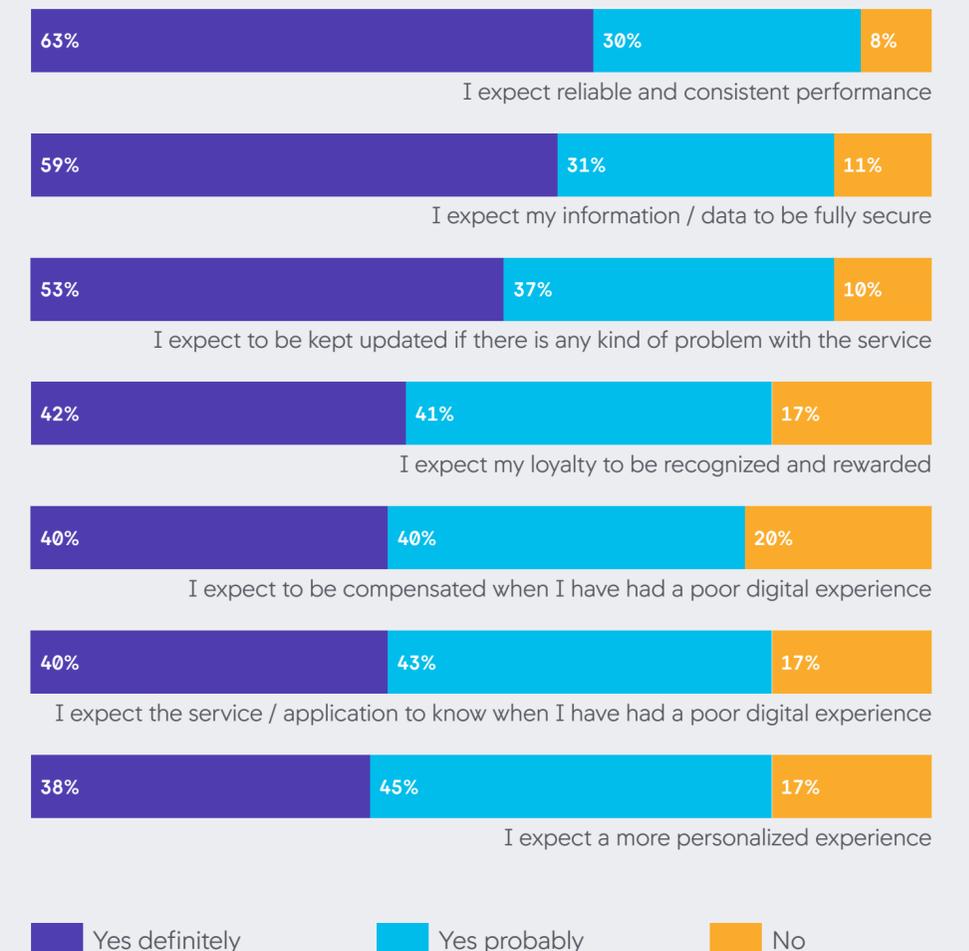
Expectations soar on the back of enhanced digital experiences

Consumer expectations around digital experience – already at an all-time high before the pandemic – have risen even further since the start of 2020. More than three quarters (76%) of people say their expectations of digital services have increased over the same period.

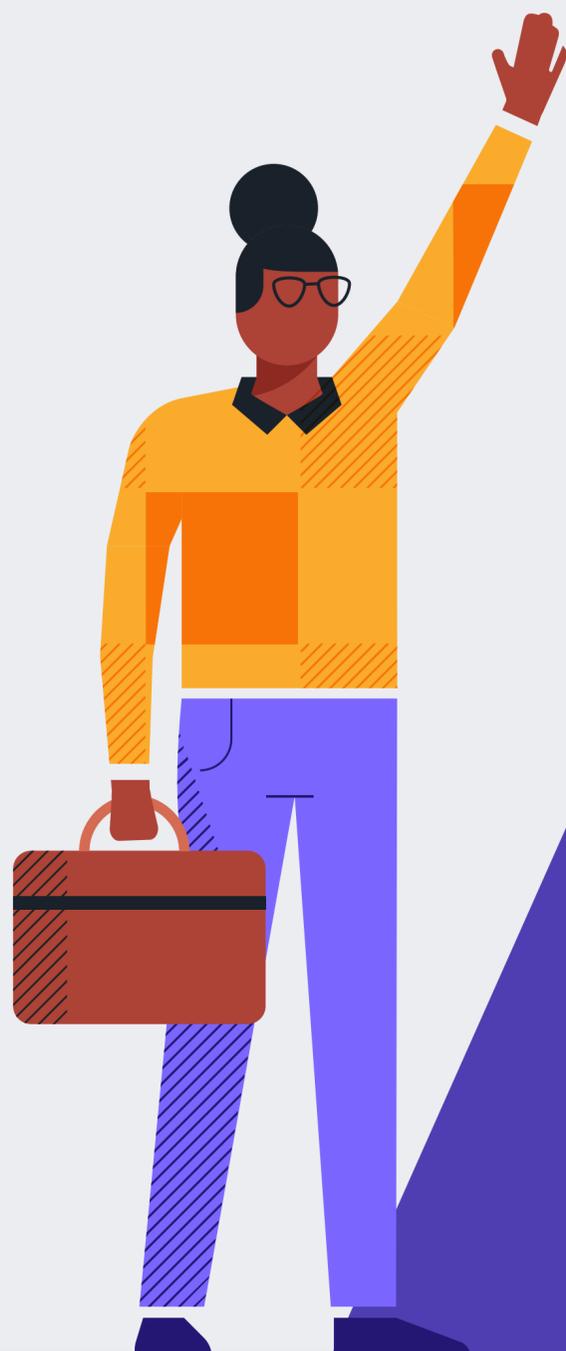
And it's not just increased dependence which is driving this rise in expectations. Consumers know that brands have had to pivot to digital services to serve customers in new ways, and as a result, they expect more innovation, personalization, engagement and reliability. People have seen and experienced the dramatic improvements that some brands have made to their digital offerings during the pandemic, and they now expect the same everywhere.

Expectations towards digital services have risen across a wide range of performance and functionality areas over the past 18 months, particularly around reliability, security and personalization.

Areas where expectations of digital services have increased since beginning of 2020



A sense of digital gratitude



In every sector, there are examples of brands – and technologists at the heart of those businesses – who recognized that simply ‘switching to digital’ was not going to be enough.

Organizations, and in some cases entire industries that have been long run on tried and tested practices, have seen the benefits of wholesale innovation and of leveraging applications to offer a better customer experience.

The research shows that consumers recognize the efforts that these brands have made to meet their needs during this challenging period, delivering applications that have allowed them to feel more in control and empowered during the pandemic.

72%

of people say they are grateful to brands that have invested in digital during the pandemic so they could access the services that they love and rely on.

67%

say some brands have gone above and beyond with the quality of their digital service during the pandemic. They hugely value this and say it has positively impacted their loyalty to that company.

Appetite for digital alternatives will outlast the pandemic

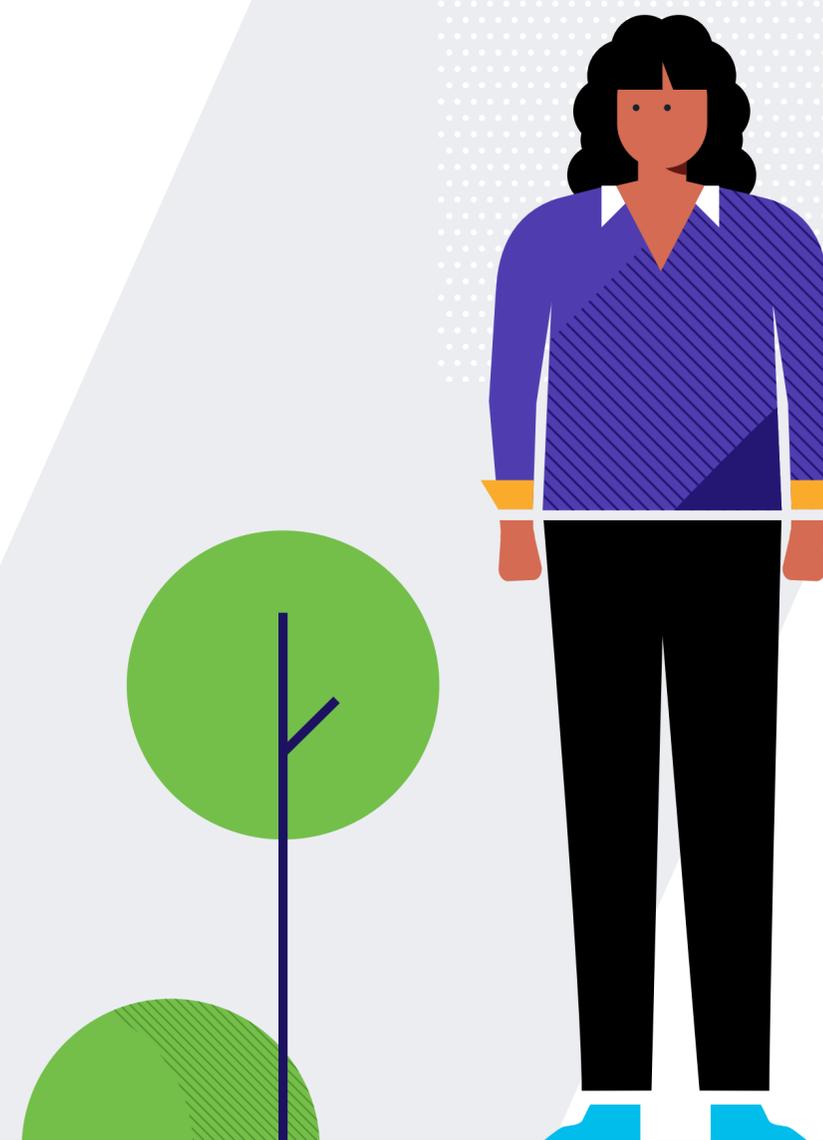
Of course, we all look forward to the day (hopefully in the not too distant future) when some areas of our lives will return to 'normal' – going to the office, attending live music events, taking children to the cinema or traveling abroad to vacation with friends and family. But the pandemic has changed mindsets and behaviors intrinsically, and for good.

We now know that in almost every part of our lives, there is an engaging and convenient digital alternative to the way we used to do things. From now on, we'll always have the option to use applications to facilitate incredible experiences – and for the first time, we have genuine choice and control across the online and offline worlds.

This explains why 88% of people expect their reliance on digital services to stay the same or increase over the next 12 months.

People of all ages report that applications have made activities more accessible over the past 18 months and helped them juggle their various commitments and interests. This is particularly the case for those under 45 years old. Similarly, younger people are most likely to have used applications to try new things that they wouldn't have done before.

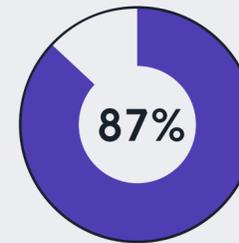
However, the findings show the extent to which older people have embraced applications and digital services during the pandemic. Around two thirds of people over the age of 65 claim that applications have allowed them to try new things and to fit in activities around their usual commitments.



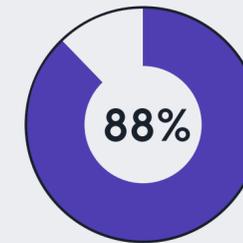
Activities have become more accessible.

83%

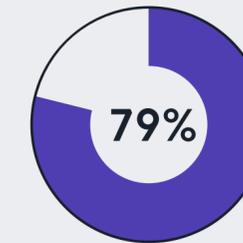
of consumers say the availability of digital services has made some activities more accessible and easier to fit around other commitments.



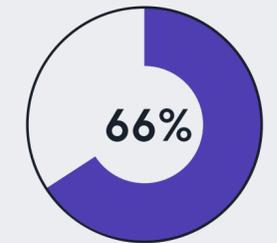
18-24



25-44



45-64



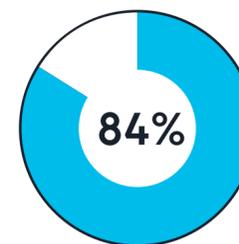
65+

Percentage of people, by age, saying the availability of digital services has made some activities more accessible and easier to fit around other commitments.

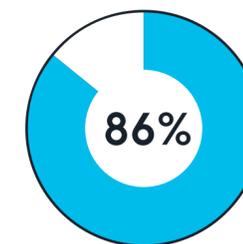
People are able to try new things.

81%

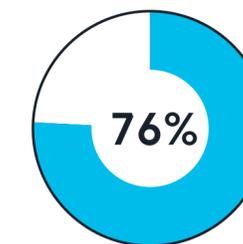
state that the availability of digital services has enabled them to try new things that they wouldn't have done before.



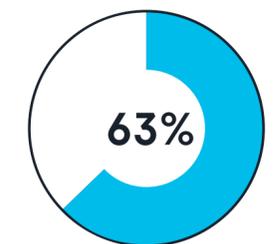
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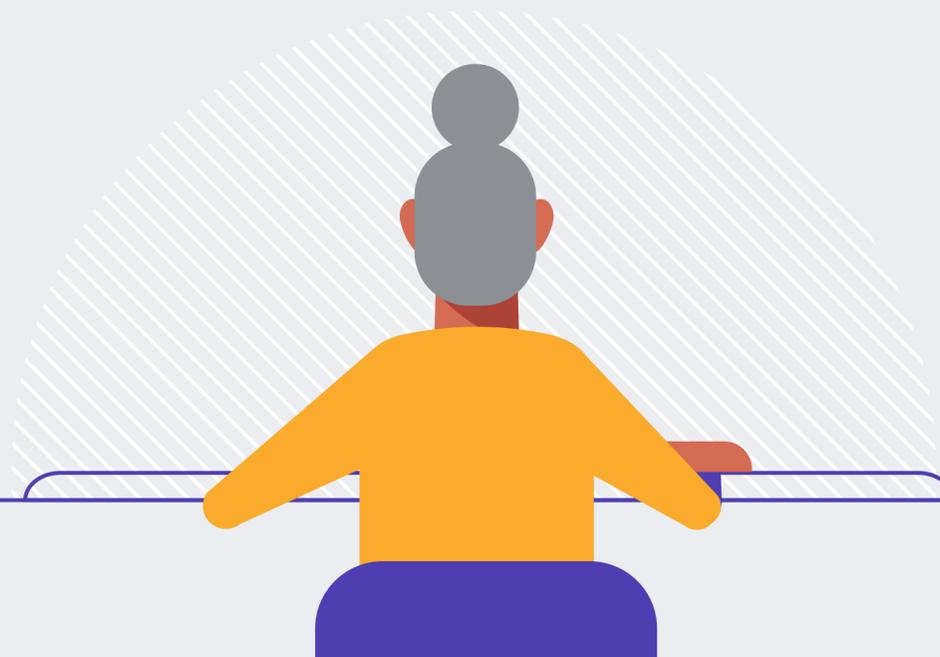
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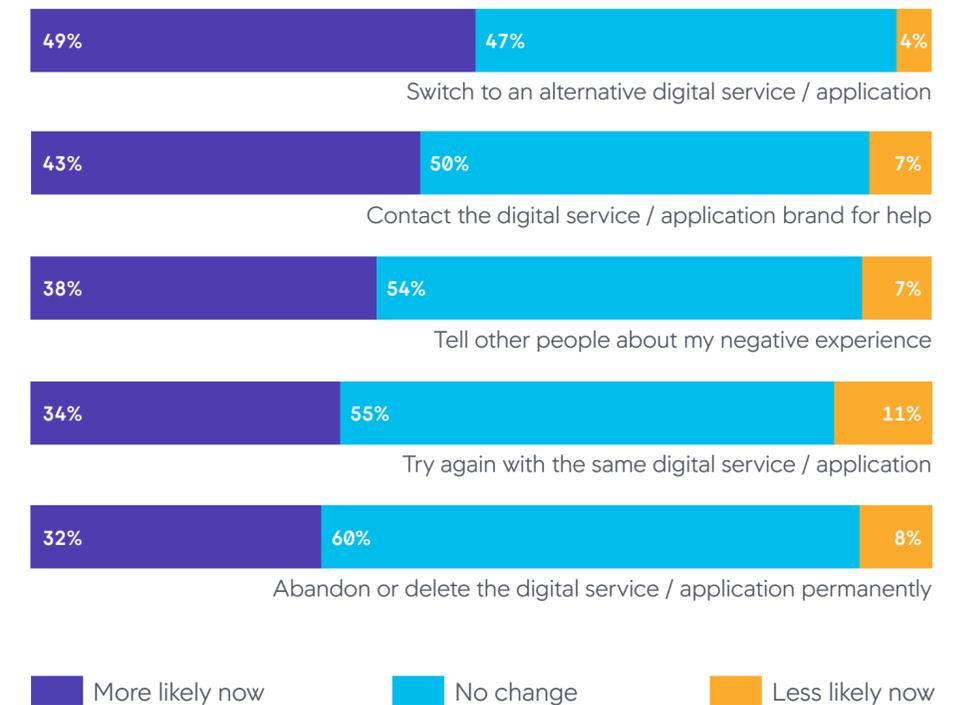
Less tolerance, more action when it comes to poor digital experience

As consumer expectations have risen to an all-time high, people have become less tolerant of poor digital experiences.

83% of people report having encountered problems with applications and digital services in the past 12 months and most are now far more likely to take action when they do. That includes switching to an alternative service, sharing their negative experiences with other people, or deleting the digital service permanently. Compared with two years ago, very few people are now willing to suffer in silence when they encounter a performance issue with an application.



Changes in consumer responses to performance issues since beginning of 2020

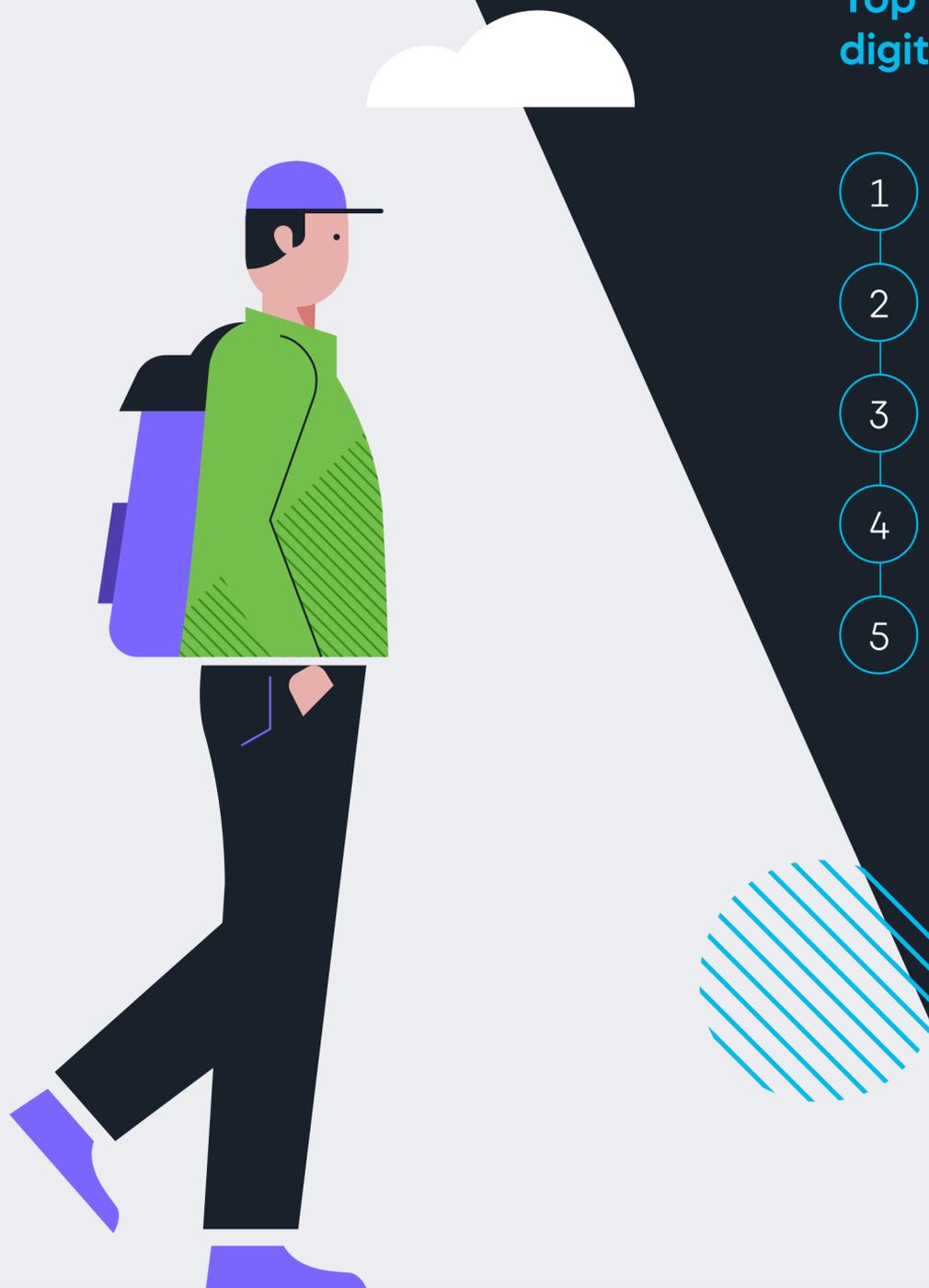


So what sorts of issues might cause a consumer to walk away?

Today, the experience of using an application can be impacted by many variables, from those that sit within the application itself – such as pages loading slowly, poor response times, downtime, or security failures; through to external factors outside the application – such as bad internet connectivity, 4G/5G mobile network issues, slow payment gateways or technical issues with third party plug-ins. This has caused massive complexity for brands and for the technologists responsible for monitoring performance and delivering seamless digital experiences for end users.

Why? Because many of these issues have not traditionally been the responsibility of the application ‘owner’ – the technologists responsible for monitoring the application, and identifying and fixing performance issues before they impact the customer.

But in a world where consumer expectations of digital experiences have reached new heights, the question of ‘Who takes the rap for the app?’ lays responsibility squarely at the door of the failed application – or more importantly, the brand behind the application. No matter the cause.



Top five problems encountered with digital services over past 12 months

- 1 **Slow page / screen loading**
- 2 **Poor connectivity**
- 3 **Crashing / stopped working**
- 4 **Slow streaming of content / media**
- 5 **Slows down device / drains battery**

Fingers point firmly at the brand when things go wrong

60% of people blame the application or brand when they encounter a problem with a digital service, irrespective of the issue. And 72% of people believe it's the responsibility of the brand to ensure that the digital service or application works perfectly.

It doesn't matter whether a problem is 'internal' to the application or brand, or due to an external factor, consumers immediately blame the brand or application owner. And frustration levels rise even higher if people encounter a problem when using a paid-for, premium application or subscription service.

Consumers simply aren't interested in the cause of the problem, they just want and expect the application to work properly. And if it doesn't, then they take it as a personal affront.

68%

of people believe it is disrespectful to users for brands to offer a poor digital experience in this day and age.

57%

say they imagine most problems with digital services / applications are completely avoidable.

71%

expect an enhanced experience if they are paying for a digital service.



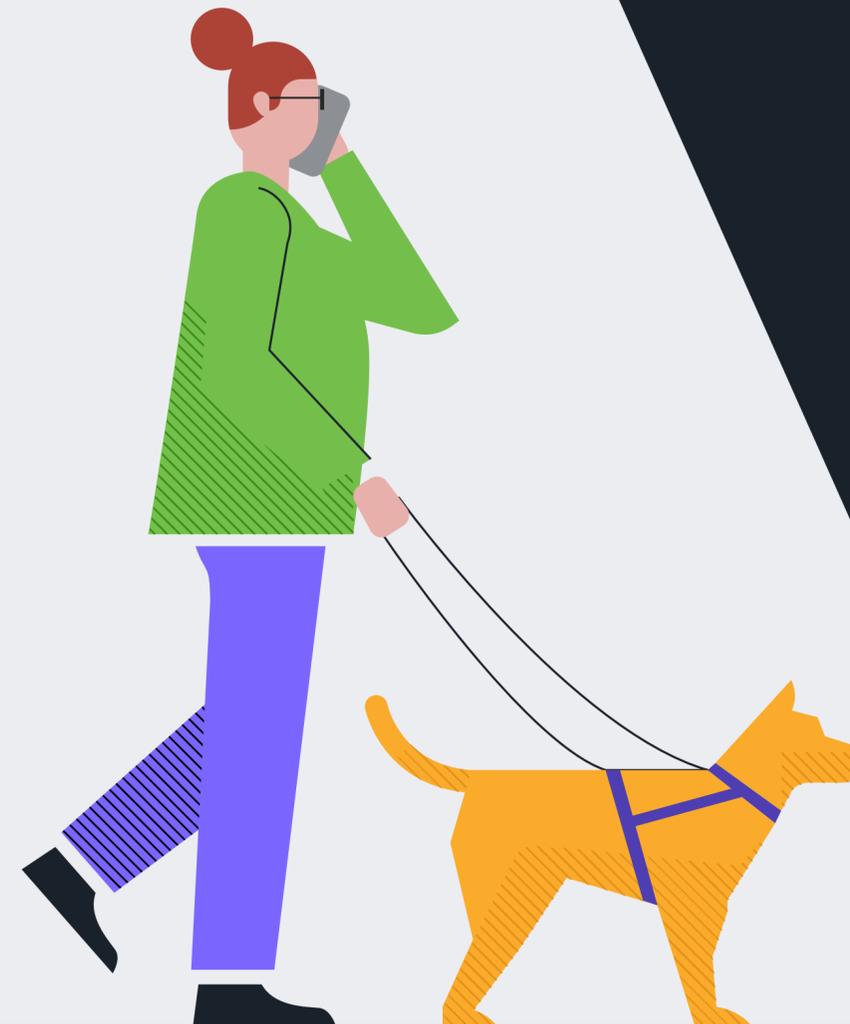
Delivering the 'total application experience'

With so much more choice on offer, and so many brilliant digital services available, consumers have become far more selective about the applications they use. They know what they like and when they find it, they keep going back for more.

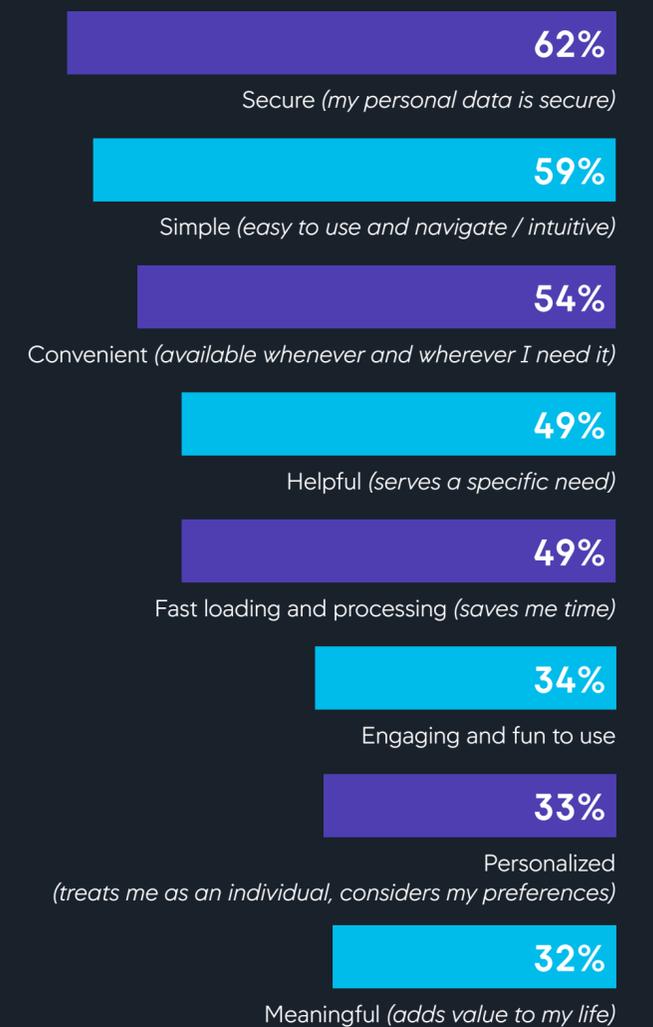
Today's consumers are looking for the 'total application experience' – a high-performing, reliable, digital service which is simple, secure, helpful and fun to use. It is personalized to their own individual needs and preferences and it adds real value to their lives.

For brands, this new perspective of the application experience is hugely important because, for the first time, consumers aren't distinguishing between different aspects of the application experience. They are only thinking about the digital experience as a whole. And therefore, they are associating any issues or negative experiences to the application itself.

Of course, this isn't always fair on the application owner but this is the world in which brands are now operating.



Components of a high-performing 'total application experience'



Brands have one shot to deliver the 'total application experience'

Consumer expectations of digital experiences and applications have gone stratospheric. In fact, 61% of people state their expectation of digital services has changed forever and they won't tolerate poor performance any more.

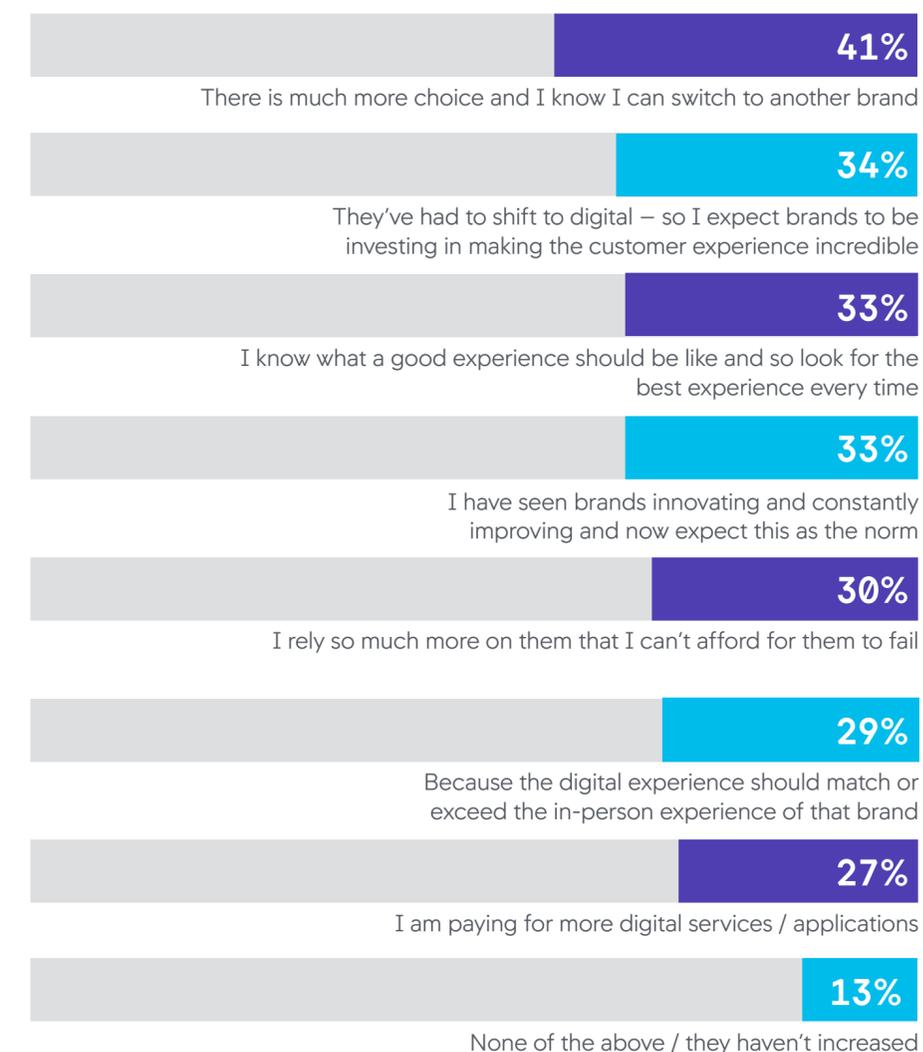
With consumers benefiting from massive improvements in the quality of many digital services and even more choice, they are making their opinions known and switching brands without hesitation if they encounter a problem. And this trend applies across every demographic, geography and industry.

Critically for application owners, 57% of people say brands have one shot to impress them and that if their digital service does not perform, they won't use them again.

We've reached a point where more than half of all consumers aren't willing to give second chances to brands that don't deliver a top quality digital experience. Brands have a single opportunity to impress. Fail – or even miss the mark by the smallest of margins – and previously loyal customers will walk away, forever.

Businesses need to wake up to the fact that an application is no longer an extension of the brand or an additional channel to engage customers. Today, the application is the business.

Why expectations of digital services have increased



Meeting consumer expectations with the AppDynamics Business Observability platform

Spiralling customer expectations and the total lack of tolerance for poor digital experiences have heaped huge pressure onto application owners during the pandemic.

At the same time, new functionality, increased users and far greater demand on application, have led to soaring complexity in the IT department. This is making it more challenging for IT leaders to know how to prioritize application fixes based on the impact to the business and the user.

AppDynamics is committed to helping these technologists tackle the challenge of delivering the 'total application experience'. Today's users demand frictionless, faultless digital experiences. But meeting their ever-rising expectations is difficult because modern architectures have become too complex for even their operators to fully comprehend. AppDynamics is a key component of Cisco's solution for full-stack observability and is helping technologists see, understand, and optimize what happens inside and beyond their IT architecture - all through the lens of business impact.

The AppDynamics Business Observability platform transforms organizations faster by providing business context deep into the technology stack, aligning teams around shared priorities, and enabling technologists to act with confidence on what matters most to the business.



About AppDynamics

Cisco AppDynamics, the industry leading Business Observability platform, is a key component of Cisco's solution for full-stack observability with business context. AppDynamics helps technologists prevent digital performance issues by monitoring cloud-native technologies and traditional infrastructure to understand exactly what drives user experiences and impacts the bottom line for businesses. Core products include: Business iQ, Experience Journey Map, Secure Application and Cognition Engine.

AppDynamics has been recognized by Gartner as a leader in the APM market for more than nine years. It received Glassdoor's 2019 Best Places to Work Award and Fortune's #1 Best Place to Work in 2021 as part of Cisco.