60__decibels

Orenda, Pakistan

Impact Report

August 2022

GSMA

At A Glance

Top Insights

> **Orenda is providing a scarce product to an underserved market:** 94% users are gaining access to an application like Taleemabad for the first time, more than what we saw in the baseline (83% in 2021). Nearly all users cannot find a good alternative to the Taleemabad app.

>**Three-quarters of users say their quality of life has improved, with 18% reporting significant improvements:**
83% of ERP users and 72% of KaiOS users report quality of life improvements. The top outcomes reported are improved teaching skills, academic performance, and increased productivity.

>**4 in 5 ERP users say classroom engagement has improved, with 13% reporting significant improvements:**
The majority of ERP users report improvements due to the animated video content in the application. These users consider videos, visual presentations, and lesson plans as helpful features on the app.

> **Satisfaction levels vary across users:**
Orenda has an overall Net Promoter Score* (NPS) of 25, which is fair. ERP users have a significantly higher NPS (65) than KaiOS users (-10). It may be worth reviewing the open-ended responses which detail the reasons for the NPS to see if there are opportunities to better demonstrate value to these groups of users.

Top Considerations

Here are some areas where Orenda might focus on:

> **Leverage social media and Orenda's staff and representatives to reach more users:** Facebook continues to be the most popular acquisition channel. Orenda staff and representatives are also bringing in more users so it may be good to leverage the sales team for greater success by sharing with them the top value drivers from users perspective.

> **Expand access to more low-income customers:** 16% of Taleemabad's users live below the $3.20/day line, compared to the national average of 35%. How can Orenda increase the app reach among low-income users?

Key Indicators

18%
reported their quality of life 'very much improved'

95%
who cannot find a good alternative to Taleemabad app

94%
did not have access to a similar application before Taleemabad

14%
have experienced a challenge when using Taleemabad

*The Net Promoter Score (NPS) is a common gauge of satisfaction and loyalty; the score ranges from -100 to 100 and based on that respondents are categorized as 'Promoters', 'Passives' and 'Detractors'. More on this on page 14.

"I love the way content is provided in both Urdu and English in Taleemabad. This has been helpful to my students as they are able to learn and understand concepts in the different languages."
– Female, 44, ERP User

Who is Orenda reaching?
- Demographics

The average Taleemabad user we spoke to is a 27 years-old male, living in the Punjab region with 6 other household members. Over two-thirds of users currently reside in the Punjab region, with the remainder split between Khyber Pakhtunkhwa (16%), Sindh (14%), and Balochistan (1%).

We spoke to two user types – KaiOS users and ERP Users. The majority of KaiOS users we spoke to were parents of children who use the app. In some exceptional cases, we spoke to the children after getting parental consent.
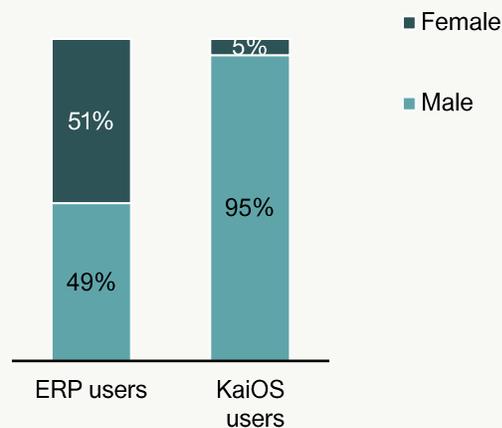
Respondent Type

(n = 277)

- KaiOS users
- ERP users

45% 55%
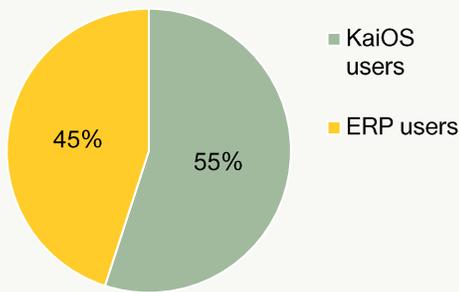
Gender of respondents

(n = 277)

- Female
- Male

ERP users: 51% / 49%
KaiOS users: 5% / 95%

Age distribution

(n = 191*)

22 years

Average age of KaiOS users

34 years

Average age of ERP users

"The videos in the application keep my students engaged in the classroom."
- Male, 27, ERP User

*A small proportion of customers did not respond to this question.

Who is Orenda reaching? - Income levels

Using the Poverty Probability Index (PPI®) we measured how the income profile of Taleemabad's users' households compares to the Pakistan average. Pakistan is considered a lower-middle income country as per World Bank's definition. The recommended poverty line for such countries is $3.20/day. At this line, Orenda is reaching a lower proportion of low-income users (16%) as compared to the Pakistan national average (35%). Compared to the baseline, there is a slight increase in the proportion of low-income users reached (11% in 2021 vs 16% in 2022). 7% of the ERP users are low-income users, compared to 23% of the KaiOS users.

Income distribution of Orenda's customer households relative to Pakistan average
% living below $x.xx per person / per day (2015 PPP) (n = 188)

Using the PPI, we also measure the degree to which Orenda is serving low-income users, compared to the general population. The higher the ratio, the higher the representation of low-income users in Orenda's customer base.

1 = parity with national population. ; > 1 = over-serving low-income users ; < 1 = under-serving low income users.

Inclusivity Ratio

Degree that Orenda is reaching low-income users in Pakistan.

0.46

See appendix for calculation.

Who is Orenda reaching?
- Disability

We used the *Washington Consensus* questions on disability to provide insights into the profile of users and how products, services, marketing, training, or after-sales support could be more inclusive.

1% of all users we spoke with report facing some level of disability, compared with the national average of disability prevalence in Pakistan of 24% (The Disability Data Portal).

Disability Profile of Orenda's User

% of users who they had 'some' or a lot of difficulties doing any of the following, or can't do at all (n = 236)
Data in blue = 2022 results
Data in red = 2021 results

1% | 2%
have difficulty seeing, even if wearing glasses (if available)

0% | 0%
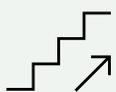have difficulty with self-care, such as washing all over or dressing

0% | 0%
have difficulty hearing, even if using a hearing aid (if available)

0% | 1%
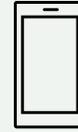have difficulty remembering or concentrating

0% | 0%
have difficulty walking or climbing steps

0% | 1%
have difficulty communicating or being understood, using their usual language

How are users interacting with mobile internet?

Current Mobile Usage Patterns

10% of users we spoke with reported having no prior mobile internet usage before using the Taleemabad app (0% in 2021). Compared to the baseline, we see an increase in the proportion of users reporting daily usage of different services on their phones.
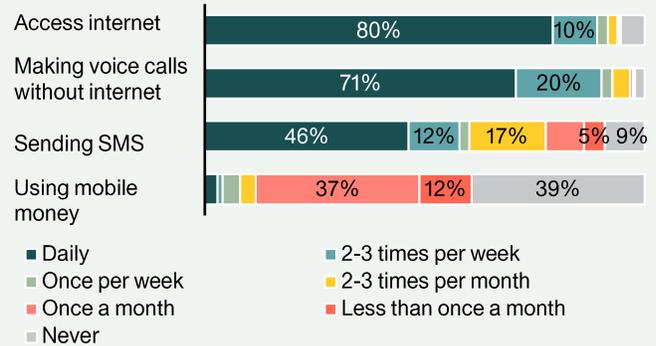
No Prior Mobile Internet Usage

Q: Were you using the internet on your mobile phone before using Taleemabad? (n = 277)

10%

report that they were **not using the internet on their mobile phone before** using Taleemabad

Current Mobile Usage Patterns

Q: How often do you use the following on your mobile phone? (n = 277)

	Daily	2-3 times per week	Once per week	2-3 times per month	Once a month	Less than once a month	Never
Access internet	80%					10%	
Making voice calls without internet	71%	20%					
Sending SMS	46%	12%		17%		5%	9%
Using mobile money					37%	12%	39%

- ■ Daily
- ■ Once per week
- ■ Once a month
- ■ Never
- ■ 2-3 times per week
- ■ 2-3 times per month
- ■ Less than once a month

Barriers to Internet Usage

We asked users about the barriers they faced in using mobile internet. There was an increase in the proportion of users reporting barriers to mobile internet usage in the endline (4% in 2021 vs 12% in 2022). KaiOS users are more likely to report barriers (19%) compared to ERP users (2%), indicating a potential focus area for Orenda. Poor connectivity is the most common barrier, common across both the baseline (53%) and endline studies (91%).

Proportion of users Reporting Barriers to Their Internet Usage

Q: Are there any barriers that stop you using mobile internet more often? (n = 277)

- ■ Yes
- ■ No

12%

88%
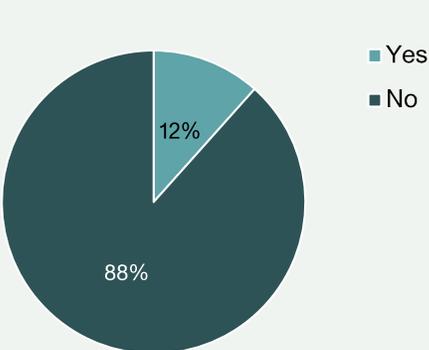
Most Common Barriers

Q: Please explain what stops you from using the internet more on your mobile phone. (n = 32, both KaiOS and ERP Users). Open-ended, coded by 60 Decibels.

91% mentioned **poor connectivity**
(11% of all respondents)

6% talked about **high cost of mobile data**
(1% of all respondents)

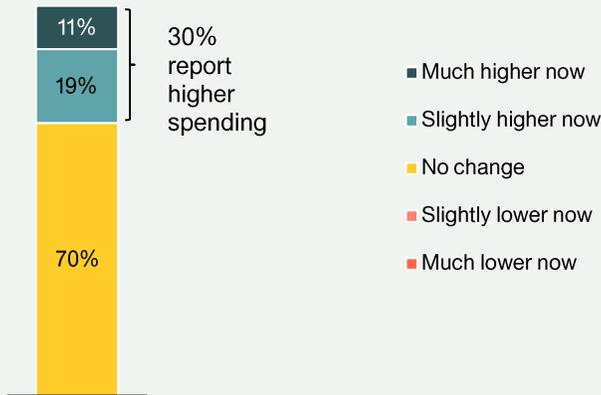# How are users interacting with mobile internet?
- Expenditure & Trust

Expenditure on Mobile Data

Similar to the baseline study, 7 in 10 users report seeing 'no change' in their monthly spend on mobile data after using Taleemabad, with 3 in 10 reporting increases. For all the users who report seeing a change in their monthly spending, 39% of users attribute 'almost all' of the change to the Taleemabad app.

Monthly Spend on Mobile Data

Q: Compared to before using Taleemabad, is your monthly spend on mobile data: (n = 277)

11%

19%

{ 30% report higher spending

70%

- Much higher now
- Slightly higher now
- No change
- Slightly lower now
- Much lower now

Smartphone Usage and Mobile Data

Q: How much of this change in monthly spending on data was because of Taleemabad? (For all those who report seeing a change n = 84)
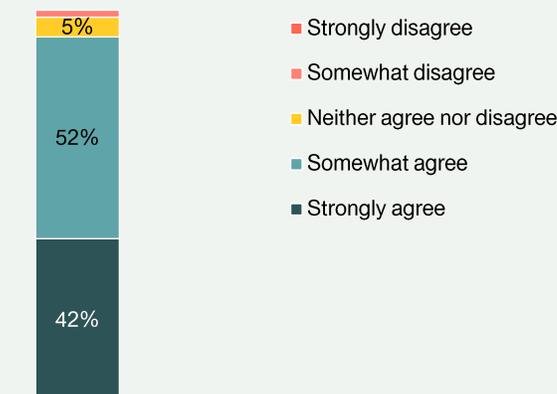
61%

39%

- Cannot say
- None of the change
- Some of the change
- Almost all
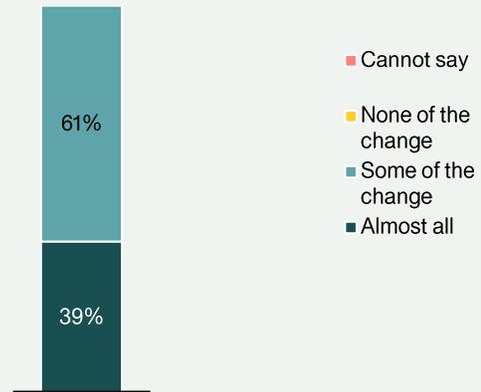
Extent of Personal Data Protection/Trust

4 in 10 users say they 'strongly agree' that they trust the Taleemabad app with their personal data which is roughly similar to what we saw in the baseline (48% in 2021). Promoters (72%) and female users (51%) are more likely to 'strongly agree' than their counterparts.

Trust About Personal Data

Q: To what extent do you agree or disagree with the following statement: "I trust Taleemabad with my personal data." (n = 277)

5%

52%

42%

- Strongly disagree
- Somewhat disagree
- Neither agree nor disagree
- Somewhat agree
- Strongly agree

Segments	'Strongly Agree' to Personal Data Protection/Trust
Female	51%
Male	38%
Promoter*	72%
Passive*	27%
Detractor*	8%
KaiOS	28%
ERP	58%

Credits: Orenda

"The Taleemabad app has helped me in controlling the classroom as I was able to teach students classroom rules and other protocols." - Female, 30, ERP User

Is Orenda filling a market gap?

94% of users we spoke with are accessing an application like Taleemabad for the first time. This is higher than what we saw in the baseline (83%). 95% of users cannot easily find a good alternative to the Taleemabad app, suggesting that Orenda is providing a relatively scarce product in the market. For the 5% of users who could easily find an alternative, the top alternatives mentioned are Afaq Education (13%), Degi Skills (13%), and Noon Academy (13%).
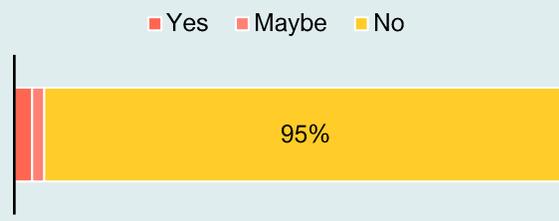
First Access

Q: Before Taleemabad, did you have access to offerings like the Taleemabad app provides? (n = 277)

- Yes, had prior access   ■ No, no prior access

94%
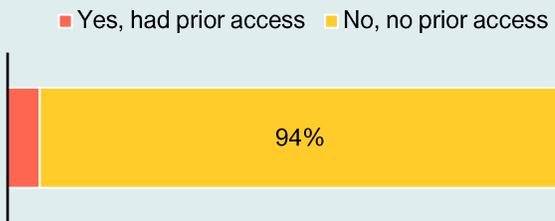
Access to Alternatives

Q: Could you easily find a good alternative to Taleemabad app? (n = 277)

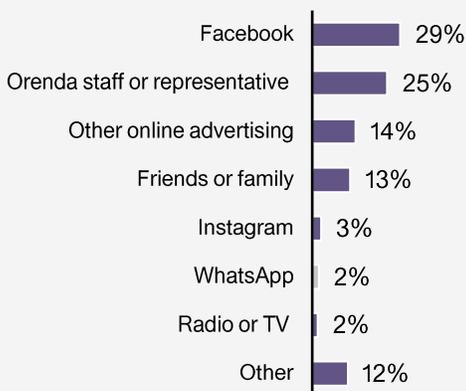■ Yes   ■ Maybe   ■ No

95%

Spotlight On: How do users first hear about Taleemabad?

Users highlight Facebook (29%) and Orenda's staff or representatives (25%) as the primary channels for first hearing about Taleemabad. Facebook is consistently the top acquisition channel in both baseline and endline studies. The proportion of users learning about Taleemabad app from the company's staff or representatives has increased significantly since the baseline (3% in 2021 vs 25% in 2022).

Acquisition Channels

Q: How did you first hear about the Taleemabad app? (n = 277)

Channel	Percentage
Facebook	29%
Orenda staff or representative	25%
Other online advertising	14%
Friends or family	13%
Instagram	3%
WhatsApp	2%
Radio or TV	2%
Other	12%

"I have observed a very positive change in my children and grandchildren because of this app." – Male, 60, KaiOS User

How have users experienced Orenda so far?

Challenges Experience

Compared to the baseline results, we see a slight decrease in the proportion of users reporting challenges (19% in 2021 vs 14% in 2022). KaiOS users are more likely to report experiencing a challenge (22%) compared to ERP users (6%). Technical difficulties with the application, poor user experience, and poor quality of content are the top challenges faced by users.

Proportion of users Reporting Challenges

Q: Have you experienced any challenges with using Taleemabad app? (n = 277)

- Yes
- No

14%

86%
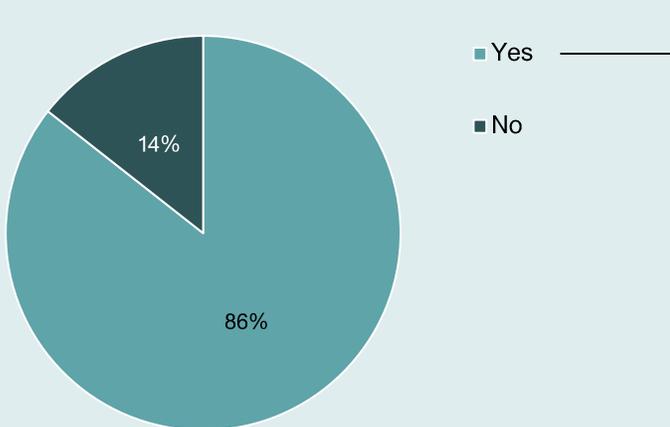
Most Common Challenges

Q: Please explain these challenges. (n = 40, inclusive of KaiOS & ERP Users). Open-ended, coded by 60 Decibels.

48% mentioned **technical issues**
(7% of all respondents)

"My mobile phone does not support this application and I'm facing technical issues whenever I try to log in."

25% talked about **poor user experience**
(4% of all respondents)

"I could not figure out how to proceed to the next page or select the right option to access content on the app."

8% reported **poor quality of content**
(1% of all respondents)

"I could not find good quality topics related to my subject in the app."

Value for Money

Almost two-thirds of the users consider the Taleemabad app to be of 'very good' or 'good' value for their money. Those who have not experienced challenges using the products are more likely to rate Taleemabad app as 'good' and 'very good' value for money (67%) than those with challenges (40%). Customers rating Taleemabad app as 'good' or 'very good' value of their money have a significantly higher NPS (80), than those rating it 'fair', 'poor' or 'very poor' (-61).

Perceived Value for Money

Q: All things considered, how do you rate the value for money of Taleemabad app? (n = 276)

- Very good
- Good
- Fair
- Poor
- Very poor
- Did not pay

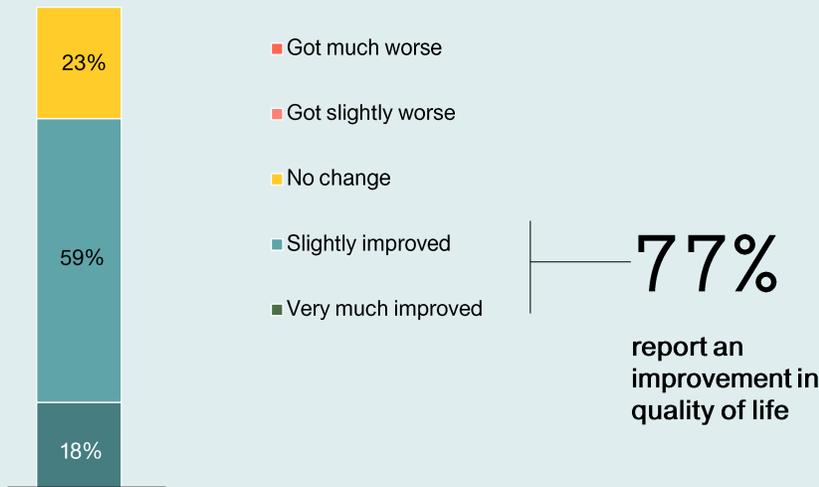| 21%	42%	16%	4%	16%
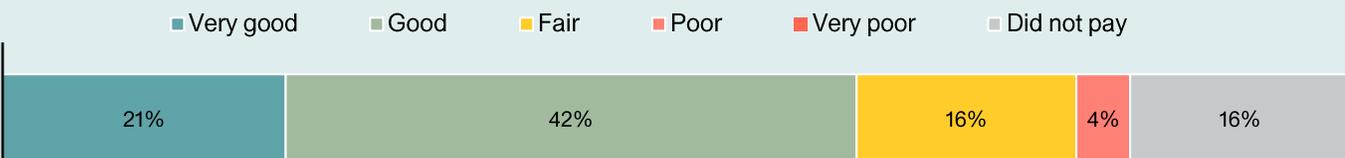
What impact is Orenda having on users' lives?

Users were asked to reflect on whether their quality of life has changed because of the Taleemabad app. In total, 77% of users say their quality of life has improved, with 18% of all users reporting it has 'very much improved'. 23% of users report experiencing 'no change', with nearly half of them saying that it's too soon to tell as they haven't used the application long enough.

Perceived Quality of Life Change

Q: Has your quality of life changed because of Taleemabad app? (n = 277)

- ■ Got much worse
- ■ Got slightly worse
- ■ No change
- ■ Slightly improved
- ■ Very much improved

77%

report an improvement in quality of life

Users who say their quality of life has improved talk about improved teaching skills, improved academic performance, and enhanced productivity.

40%

mention **improved teaching skills**
61% ERP users
5% KaiOS users

37%

talk about **improved academic performance**
27% ERP users
47% KaiOS users

14%
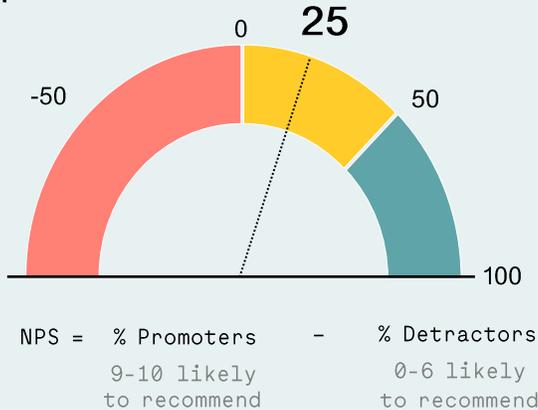
shared about **enhanced productivity**
4% ERP users
18% KaiOS users

"Now I know how to make a difficult topic easy and make it understandable to every student."
- Female, 34, ERP User

How satisfied are Orenda's users?

Orenda has a Net Promoter Score® of 25, which is fair – suggesting there is room for improvement!

25

0

-50

50

100

NPS = % Promoters – % Detractors
9-10 likely   0-6 likely
to recommend   to recommend

Orenda has a Net Promoter Score of 25. You have a high number of Passives indicating there is room for improvement.

The NPS is higher for ERP users (65), compared to KaiOS users (-10).

The table below highlights what Promoters and Passives value and what Detractors would like to see improved. We recommend ensuring that Orenda's marketing material is aligned to what Promoters say they value.

Addressing some of the requests from Detractors and Passives could help convert them to Promoters and increase NPS.

What's Driving Satisfaction?

Promoters value the interactive learning application, good user experience, and improved academic performance.

38%
are Promoters

They love:

1. Interactive learning application

44% ERP users
8% KaiOS users

2. Good user experience

13% ERP users
0% KaiOS users

3. Improved academic performance

6% ERP users
3% KaiOS users

49%
are Passives

They like:

1. Interactive learning application

15% ERP users
46% KaiOS users

2. Good user experience

9% ERP users
21% KaiOS users

But dislike:

1. Expensive charges

7% ERP users
2% KaiOS users

13%
are Detractors

They want to see:

1. More training on how to use the application

8% ERP users
18% KaiOS users

2. More detailed and up-to-date content

15% ERP users
10% KaiOS users

3. Resolution of technical issues

5% ERP users
16% KaiOS users

# What Impact is Orenda having on Classroom Engagement?

Smartphone Usage and Likelihood of using among KaiOS users

1 in 5 users say they currently use a smartphone. When we asked non-users about their likelihood to switch to a smartphone, 1 in 2 say they are 'very likely' to switch to a smartphone costing between 10,000 - 12,000 PKR.
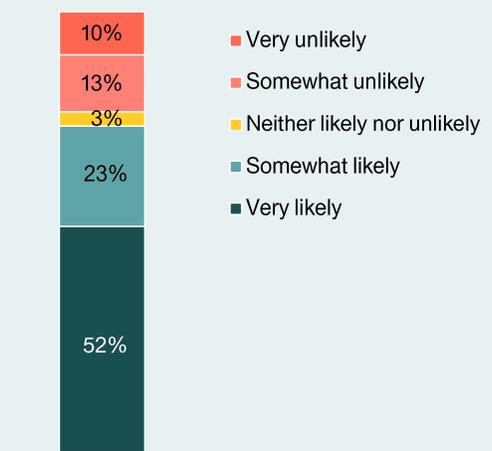
Smartphone Usage

Q: Do you currently use a smartphone? (KaiOS users n = 151)

- Yes
- No

22%

78%
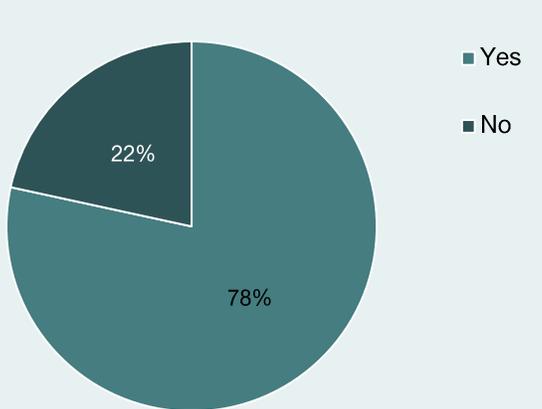
Likelihood to Switch to a Smartphone

Q: In the next 3 months, how likely or unlikely are you to switch to a smartphone that costs around 10,000 - 12,000 PKR? (KaiOS users n = 31)

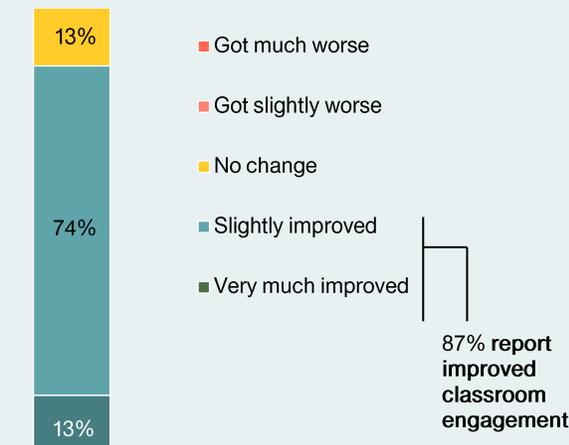|	
10%	Very unlikely
13%	Somewhat unlikely
3%	Neither likely nor unlikely
23%	Somewhat likely
52%	Very likely

Impact on Classroom Engagement for ERP Users

87% of ERP users say classroom engagement has improved because of animated video content in Taleemabad. Online videos were rated as the most helpful ERP feature.

Change in Classroom Engagement

Q: Has there been a change in classroom engagement because of the animated video content in Taleemabad? Has it: (ERP users n = 123)

13%	Got much worse
	Got slightly worse
74%	No change
	Slightly improved
13%	Very much improved

87% report improved classroom engagement

Most Helpful Feature

Q: What feature of the ERP, if any, has helped you the most in solving a problem you previously had? Open-ended, coded by 60 Decibels (ERP Users n = 126)

Feature	
Online videos	38%
Visual presentations	22%
Lesson plans	10%
Teacher's guide & resources	10%
Short quizzes	8%
School management system	6%
Too soon to tell	11%
None	3%