AUSTRALIAN MOBILE PHONE LIFESTYLE INDEX

10th Edition – Special Topic: Mobile Phone Use Compared To The Tablet And Personal Computer

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IN 2005...

69% of Survey respondents used their mobile phones for voice and SMS only. When asked why they didn’t use content or information on their phone 79% said, “I don’t care I just want to use it for phone calls” or “I don’t get any value out of it.”

IN 2014...

9% of Survey respondents used their mobile phones for voice and SMS only. 61% would choose a mobile phone instead of a TV. 50% would choose a mobile phone instead of a PC or tablet. 34% only have a mobile phone and no landline (home) phone. 29% always use their phone while in bed.

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Promoting and Linking to the Survey

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- Yahoo!7

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AIMIA

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EXECUTIVE SUMMARY

This report presents the results of the 10th Australian Mobile Phone Lifestyle Index that has been carried out with the sponsorship and support of the digital industry.

The overall objective of the annual study is to gain insights into the current and changing profile, behaviour and preferences of Australian mobile phone users over time. It remains the only known national, independent tracking study that makes its comprehensive results freely available to all interested parties.

In line with the overall objective of the Survey, the AMPLI:

- Focuses on all Australians that own a mobile phone, not only smartphone users.
- Includes some user-segmentation (profiling) to help companies understand the mobile phone behaviours of their customer groups. The profiling tool used is geoTribes, developed by RDA Research, a leading Australian supplier of geo-demographic solutions for companies.
- Provides industry stakeholders with external and independent validation of the mobile phone landscape in Australia.
- Collects a representative sample that can be generalised to Australian mobile phone owners between 18 and 75 years of age.
- Takes into account the changing digital landscape by including current topical questions each year.

The core questions in the Survey have remained predominately the same across the 10 years that the project has been carried out. Commencing with the second survey an annual special topic was also included to enable exploration of topical issues or emerging interests. For this edition, the special topic questions related to the use of the mobile phone compared to the use of the tablet and personal computer. This year the Survey also included some additional topical questions that explore the perceived value of the mobile phone, compared to valued goods like the car and television. The Survey also continues to track the uptake of wearable technologies.

WHAT THE SURVEY COVERED

The specific research themes addressed in the study were as follows:

- Socio-demographic profile of respondents
- Mobile phone profile
- Landline (home) phone use
- Perceived value of the mobile phone
- Use of the mobile phone during daily activities
- Uses and frequency of uses of the mobile phone
- Planned future uses of the mobile phone
- Use of websites compared to the use of applications on the mobile phone
- Specific types of services, content and applications accessed on the mobile phone
- Applications downloaded and installed on the mobile phone
- Uptake of wearable technology.
This year’s special topic – the use of the mobile phone compared to the tablet and personal computer – included capturing the following types of information:

- Ownership of the tablet and personal computer
- Top uses of the tablet, personal computer and mobile phone
- Type of purchases and purchase experience on the mobile phone, tablet and personal computer
- Preferred device for making online purchases
- Preferred device for a range of daily online activities
- Preferred type of advertising for the different devices
- Conversion rate of banner ads on the mobile phone, tablet and personal computer
- Overall preferred device.

Some key and topical findings from the Survey will be presented in the remaining sections of the executive summary. Additional detail about the findings, together with the remaining analysis is reported in the body of the report.

SURVEY DESIGN AND DISTRIBUTION

To complete the Survey the individual had to own a mobile phone and live in Australia. The Survey consisted of primarily close ended and multiple-choice questions and took respondents approximately 15 minutes to complete. Respondents that completed the Survey were eligible to enter a draw to win one of two 16GB Apple iPod Touches or one of two $250 Myer Gift Vouchers. The Survey was in the field for 18 days from Friday 19 September to Monday 6 October.

The 2014 Survey was distributed by the following mechanisms:

- AIMIA’s databases and social media channels, including the AIMIA Mobile Industry Group database and networks
- Banner ads that were placed on a range of industry websites including carrier and media sites (for a full list refer to acknowledgements)
- Emails that were sent to previous AMPLI respondents who had opted in to receive research requests
- Emails that were sent to industry contacts who had previously indicated a willingness to distribute the Survey
- Promotion of the Survey link in online industry newsletters
- Promotion of the Survey by social media (e.g., Twitter).

SURVEY RESPONSE RATE

A total of 1459 respondents completed the 2014 Survey. There was a slight over-representation of respondents whose mobile phone carrier was Virgin. This over-representation has occurred to varying degrees in past years. Since 2011 the Survey data has been weighted to better reflect the carrier market share and in doing so facilitate easier interpretation of the results for all mobile stakeholders. The weighting of responses was once again undertaken this year. The number of responses received from respondents whose carrier was Virgin was reduced to better reflect market share.

The sample size used for the analysis was 1405 respondents. The socio-demographic profile of Survey respondents is broadly in line with the profile of adult Australians released by the Australian Bureau of Statistics (ABS). Given this finding and the sample size, the results of the 2014 Survey sample can be generalised to Australian mobile phone owners between 18 and 75 years of age.

The results also show that the socio-demographic profile of the respondents across all the surveys is relatively consistent, which allows for meaningful comparisons across the years.
ABOUT THE MOBILE PHONES, PAYMENT PLANS AND CARRIERS

Smartphone Ownership

There has been no increase in smartphone ownership over the last year. 89% of respondents owned a smartphone, which is consistent with 88% of respondents last year. This follows three years of steady increases in smartphone ownership from 67% in 2011 to 88% last year.

Satisfaction With Carrier Services

Respondents were asked to indicate if they were satisfied with a range of different mobile phone service related issues. ‘Overall satisfaction’ with carrier services was consistent with the results from last year: just over 80% of respondents were very satisfied or somewhat satisfied with the services provided by carriers.

Satisfaction with services by individual carrier shows variation across the carriers for many of the services. For example:

- Overall satisfaction was higher among Virgin respondents (88%), followed closely by Telstra respondents (85%). Optus was the only carrier to record a decrease in overall satisfaction from 2013 (85%) to 2014 (79%).
- Comparisons with the 2013 Survey results show that Vodafone has recovered considerably since last year’s comparatively low satisfaction levels, which were most likely due to network issues experienced by the carrier. Their overall satisfaction increased from 62% last year to 75% this year. There was also a substantial increase in the percentage of Vodafone respondents satisfied with all the other listed services.
- Satisfaction with Telstra’s network coverage was again a standout service for the carrier and also higher compared to the other providers.

Data Inclusion In Payment Options

Respondents were asked if an allowance for mobile data is included in their monthly bill or pre-paid amount. The percentage of respondents that had a data allowance included in their payment options appears to have stabilised this year at just over 80%. This followed substantial year-on-year growth from 2009 to 2013.

Respondents were also again asked if they had ever purchased a data allowance (or data pack) in addition to their regular payment. 30% of respondents stated that they had purchased a data allowance (or data pack) in addition to their regular payment. This figure has more than doubled since the question was last asked in the 2011 Survey.

ABOUT THE PERCEIVED VALUE OF THE MOBILE PHONE

For the first time this year the Survey explored the perceived value of the mobile phone through the use of choice questions.

When given the choice between a car and a mobile phone the clear majority (70%) of respondents would select a car. However, when given the choice between a mobile phone and television, about 60% of respondents chose a mobile phone. This suggests that while many may not be ready to give up their car for a phone, they are less connected to their televisions.

When given the choice between a mobile phone, a tablet and a personal computer, the tablet or ‘in-between’ device appeared to be by far the least ‘valued’ by respondents - only 16% would select the tablet if they had to choose.
between the three devices. Half of the respondents would select a mobile phone, and just over a third (34%) the personal computer.

In summary, the perceived ‘value’ of the mobile phone was greater among young singles and/or couples and less ‘valued’ among the older based geoTribes regardless of their socio-economic status.

ABOUT THE USE OF THE MOBILE PHONE DURING DAILY ACTIVITIES

For the first time this year the Survey also explored when respondents use their mobile phone in terms of their day-to-day activities. The results clearly suggest that many respondents use their mobile phone while doing something else.

At least 74% of respondents use their mobile phone at least sometimes while watching TV, eating a meal alone, travelling on public transport and while in bed. More than 60% of respondents use their mobile phone at least sometimes while using their tablet or personal computer or travelling in the car. A third of respondents admit to using their mobile phone at least sometimes while eating with others.

The results also found that approximately 30% of respondents claimed that they always use their mobile phone while in bed, and watching TV, while 39% always use their phone while travelling on public transport.

ABOUT HOW THE MOBILE PHONE IS USED

Overall Use Of The Mobile Phone

Respondents were asked how often they used their mobile phone for a range of listed purposes, which included: voice, SMS, to send and receive emails, to get information, for entertainment purposes, to visit websites and/or browse or search the Internet, for banking including transfers and bill payments, to buy things online and to read or edit documents or files.

Overall, the results for 2013 and 2014 are consistent suggesting that 2014 has been a year of consolidation with minimal or no change in the percentage of respondents who have used the mobile phone for most of the listed services. The use of the mobile phone for banking and to buy things online, were exceptions and showed a small increase in use. This follows a period of substantial growth between 2011 and 2013 in the percentage of respondents who used the phone ‘in the last 12 months’, for every listed purpose beyond texting and voice (which had almost no room for growth).

Top 5 Ways Respondents Use Their Mobile Phones

Since 2012 respondents have also been asked to rank the top 5 ways they use their mobile phone from a selected list (the same list of phone purposes used to capture overall phone uses and frequency of uses).

70% of the number one rankings were either SMS or Voice calls. Voice and SMS also dominated the second ranking spot, making up almost 50% of the number two rankings.

Using the mobile to ‘send and receive emails’ made up the second tier of mobile phone use with just over 25% of respondents ranking emailing as their first or second rank. The third tier of use was to ‘to get information’ and ‘for entertainment’. Approximately 15% of respondents ranked each of these in their top 1 or 2 uses of the mobile phone.
A comparison of combined 1 and 2 ranks across the listed mobile phone uses for the 2013 and 2014 Survey results shows little change in how respondents rank their uses of the mobile phone.

**Frequency Of Use Of The Mobile Phone For Specific Purposes**

Respondents were asked to identify how often they use the mobile phone for a specific purpose. The overall pattern of high-level\(^1\) use for the listed purposes remains consistent with the previous few years.

In summary, between 59% and 80% of respondents were high-level users of the mobile phone for the established uses of the mobile phone like voice calls, SMS, to send and receive emails, to get information and to visit websites and/or browse and/or search the Internet. The emerging uses of banking (26%), buying things online (9%) and to read or edit documents or files (18%) had comparatively fewer high-level users.

**Use Of Websites Versus Applications**

Since 2012 respondents have been asked whether they use more websites or applications on their mobile phones.

The overall pattern of website versus application use was similar across the Surveys:

- Less than 5% of respondents used applications only
- Approximately one quarter of respondents used mostly applications and some websites
- Approximately one quarter of respondents used about the same use of websites and applications
- Less than 9% of respondents used websites only.

The proportion of respondents using websites and/or applications on their mobile phone was 88%, which is consistent with the results from last year. In 2012 the figure was 77% of respondents.

**Expected Use And Preferences Of The Mobile Phone**

In this section expected and preferred uses of the mobile phone were captured. This included:

- Expected future use of the mobile phone
- Interest in the use of the mobile phone as a credit card, EFTPOS card or TV remote control – asked for the first time this year
- Preference in brand engagement – asked for the first time this year.

**Expected future use of the mobile phone**

Many respondents plan to increase their current uses of the mobile phone.

- Approximately 20% of the respondents currently using their mobile phone for emailing, getting information, and visiting websites/browsing/searching intend to increase their use of the phone for these purposes in the next 12 months.
- Between 14-17% of the respondents currently using their mobile phone for voice calls, SMS, entertainment, banking and buying things online intend to increase their use of the phone for these purposes in the next 12 months.

**Interest in the use of the mobile phone as a credit card, EFTPOS card or TV remote control**

Almost 40% of respondents would like to be able to use their mobile phone as an EFTPOS card or TV remote control, while just over a third of respondents would like to use their phones as a credit card. Of particular interest is

\(^1\) High-level users used the phone for the listed purpose daily (at least 5 times a day or at least once a day).
that 14% of respondents stated they were already using their mobile phones as a TV remote control, while 5% and 7% respectively were already using their phones as an EFTPOS card and credit card.

Preference in brand engagement
Almost half of the respondents were not interested in receiving any offer on their mobile phone from a brand they liked. The two most preferred locations to receive an offer were in the respondent’s home (22%) and near the brand’s store (20%).

ABOUT THE SPECIFIC SERVICES ACCESSED

Respondents were again asked this year about the specific entertainment, information and communications services they access on their mobile phones. Some key findings that related to high-level and medium-level users were as follows:

- Games (27%) clearly had the greatest percentage of high-level users, followed by music downloads (14%).
- The percentage of medium-level users was similar across many of the services. Between 22% and 29% of respondents were medium-level users of games (28%), Music Downloads (29%), Video Downloads (24%) and Music Streaming (22%).
- Just under 10% of respondents had a paid subscription to a music streaming service. Almost 60% of these respondents paid for Spotify, followed in distant second and third by Apple iTunes Radio (17%) and Pandora (15%).
- Weather and news were the most “popular” information services accessed in terms of frequency of use. Just over 40% of respondents were high-level users of weather (46%) and news (43%) information on their mobile phones, and approximately 30% were medium-level users.
- ‘Maps/location and traffic information’ was equally popular, but used less frequently. 50% of respondents were medium-level users and 23% were high-level users.
- In 2014 at least half of the respondents used almost every information service in the last 12 months. The only exception was TV Guides’ (48%).
- Email and social networking sites were clearly the most frequently used communication services on the mobile phone.
  - Just over half of the respondents were high-level users of email (58%) and social networking sites and applications (57%).
- MMS had a similar overall proportion of combined high and medium-level users as social networking sites and applications. However, the ratio of high to medium was reversed for MMS with most users being medium-level users.

ABOUT THE APPLICATIONS ACCESSED

Questions about the use of applications were first asked of respondents in the 2010 Survey. The proportion of respondents who have downloaded and installed an application to their mobile phone has stabilised at around 80%, following substantial yearly growth from 2010 to 2013.

Types of Applications Used By Respondents

Respondents were asked what type of applications they have used on their mobile phones in the last 6 months. Similar to the last few years the most popular types of applications used by respondents were ‘Maps and navigation’ (82%), ‘News and weather’ (72%), ‘Games’ (66%), and ‘Photos, Videos and Movies’ (62%).

High-level users used the phone for the listed purpose daily (at least 5 times a day or at least once a day). Medium-level users used the phone for the listed purpose at least once a week or at least once a month.
This year the only application that experienced growth of at least 5% was ‘Instant Messenger and Social Networking’ – 52% to 61%.

Paid Applications Downloaded and Installed on the Mobile Phones

Of those respondents who had downloaded and installed applications on their mobile phones, 45% stated they had paid to do so. This figure represents a substantial decline from last year (62%). This decrease in the percentage of respondents paying for applications may reflect the increasing range of applications available at no cost to respondents, perhaps due to an increase in ad funded business models. Alternatively respondents have sourced the paid applications they want and the demand is levelling out.

SPECIAL TOPIC - MOBILE PHONE USE COMPARED TO THE TABLET AND PERSONAL COMPUTER (PC)

PC (Laptop or Desktop) And Tablet Ownership Compared To Smartphone Ownership

Just under 90% of respondents owned both a personal computer (88%) and a smartphone (89%). Ownership of the tablet was much lower at around 60%.

53% of respondents owned all three devices, a mobile phone, a personal computer and a tablet.

Use Of The Personal Computer And Tablet Compared To The Mobile Phone

Voice and SMS are critical differentiators when compared to the computer and tablet. They are clearly (and almost uniquely) associated with the mobile phone. 34% of respondents ranked SMS either 1 or 2, and 26% ranked voice calls either 1 or 2. Emailing (12%) was a distant third in terms of combined 1 and 2 rankings. No other services are so clearly associated with a single device.

Unlike the mobile phone, the tablet and PC did not have one or two ‘foundation’ services, but instead they had a cluster of services that were ranked either 1 or 2 by around 15-25% of respondents. For the personal computer these services were:

- To send and receive emails (25%)
- To visit websites and/or browse or search the Internet (20%)
- To get information (18%)
- To read or edit documents or files (15%).

For the tablet these services were:

- To visit websites and/or browse or search the Internet (24%)
- For entertainment purposes (21%)
- To get information (19%)
- To send and receive emails (17%).
Purchases Made On The Personal Computer And Tablet Compared To The Mobile Phone

Respondents were asked a range of questions relating to the purchases made across the three devices. Some of the results from this section follow.

- More than 90% of PC owners had made a purchase on their computer. This contrasts to almost 75% of tablet owners who had made a purchase on their tablets, and almost 60% of mobile phone owners, who had made a purchase on their mobile phones.

- Unsurprisingly, those that purchased on their PC also purchased a wider range of products and services compared to the pattern of purchases made on the tablet and mobile phone. Consistent with the common use of the PC as an online purchase platform, a higher proportion of PC owners also purchased every listed product or service, compared to the tablet owners and mobile phone owners.

- Satisfaction with the purchase experience on the PC was much higher compared to the tablet and mobile phone experience; just over 60% of respondents stated they were very satisfied with the purchase experience on the computer. This compares to 40% of respondents that stated they were very satisfied with the experience on the tablet, and a quarter of respondents who stated they were very satisfied with their purchase experience on the mobile phone.

- Respondents preferred personal computers as the device for making purchases (68%). Fewer respondents preferred purchasing on tablets (12%) and mobile phones (7%).

- The type of adverts preferred was consistent across the three devices. For those respondents that own the given device and access free content:
  - Just over a third of respondents stated do not want to receive personalised ads on the mobile phone, PC or Tablet.
  - Around 30% of respondents want ads that are relevant to them on the mobile phone, computer or tablet as long as they can control what information the advertiser has about them.
  - Between 17-18% of respondents simply want ads that are relevant to them on the given device.
  - Between 16-18% of respondents stated it makes no difference to them if the ads on the device are relevant to them or not.

- Over 50% of respondents indicated that they purchased a product or service following interaction with a banner advertisement on 20% or less occasions. For each device the conversion rate was:
  - Mobile phone – 59% of respondents had a conversion rate of 20% or less
  - Personal computer – 54% of respondents had a conversion rate of 20% or less
  - Tablet – 54% of respondents had a conversion rate of 20% or less.

- The personal computer is the preferred device for almost all the listed online activities. For example, 65% of respondents prefer to research products and services on a PC, compared to 18% who prefer the tablet and 8% who prefer the mobile phone. The only exception is using social media, which respondents prefer to do on their mobile phone (36%), compared to 29% who preferred their PC and 14% who preferred using social media on their tablet.

- A comparison of respondent preferences for using the tablet or mobile phone across a range of online activities found that a higher percentage of respondents preferred the mobile phone compared to the tablet for:
  - Online banking – 22% preferred the mobile phone compared to the tablet (9%)
  - Email – 18% preferred the mobile phone compared to the tablet (11%)
  - Using social media – 36% preferred the mobile phone compared to the tablet (14%).
We trust that this research will enable industry stakeholders to develop a better understanding of the behaviour of Australian mobile phone users in their digital landscape, as part of the ongoing quest to meet changing consumer needs and expectations.

FOR MORE INFORMATION

For more information about:
- The report
- Becoming a sponsor of the 2015 Survey
- The option of additional analysis of the AMPLI data to meet your specific needs

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INTRODUCTION

This report presents the results of the 10th Australian Mobile Phone Lifestyle Index (AMPLI) Survey that has been carried out with the sponsorship and support of Industry.

The overall objective of the study is to gain insights into the current and changing profile, behaviour and preferences of Australian mobile phone users over time. It remains the only known national independent tracking study that makes its comprehensive results freely available to all interested parties.

The first study was initiated by the AIMIA Mobile Industry Group in 2005 and was motivated by the lack of available independent information about Australian mobile phone users. Apart from carrying out the Survey twice in 2007, the Survey has been carried out annually since 2005 as shown below:

- Survey 2 was carried out in May 2006
- Survey 3 was carried in March 2007
- Survey 4 was carried out in August 2008
- Survey 5 was carried out in June 2009
- Survey 6 was carried out in June/July 2010
- Survey 7 was carried out in July 2011
- Survey 8 was carried out in July 2012
- Survey 9 was carried out in August/September 2013.

We expect to continue to carry out the study annually in order to investigate longitudinal trends relating to mobile phone use in Australia, as well as studying emerging topics of importance.

The Survey consists of a series of core questions that have remained predominately unchanged since the inception of the project. Since Survey 2 questions relating to an annual special topic have also been included in the surveys. The special topics are different for each subsequent survey and have been designed to explore current topical issues or emerging interests. The project team together with the AIMIA Mobile Industry Group selects the special topic areas each year and endeavours to capture topics that will have wide appeal and interest to all users of the report. A list of the special topics for past surveys follows:

- Survey 2 2006 - The Impact of 3G
- Survey 3 2007 - Advertising on the Mobile Phone
- Survey 4 2008 - Communities and User Generated Content
- Survey 5 2009 - Mobile Commerce
- Survey 6 2010 - Mobile Phone Applications
- Survey 7 2011 - Mobile Phone Advertising and Marketing
- Survey 8 2012 - Impact of Tablets on Mobile Phone Use
- Survey 9 2013 - Mobile Retail.

For the 2014 Survey, the special topic questions related to the use of the mobile phone compared to the use of the tablet and personal computer. This year the Survey also included some additional topical questions that explore the perceived value of the mobile phone, compared to valued goods like the car and television. The Survey also continues to track the uptake of wearable technologies.
The report is organised into the following key sections:

1. Research Themes and Design
2. Survey Response Rate
3. Interpreting the Results
4. Presentation of the Results
5. The Results
6. For More Information

This research has been designed to enable industry stakeholders to develop a better understanding of the behaviour of Australian mobile phone users in their digital landscape, as part of the ongoing quest to meet changing consumer needs and expectations.
RESEARCH THEMES AND DESIGN

RESEARCH THEMES

In the overall context of developing an understanding of Australian mobile phone users in terms of their profile, current behaviour and preferences, the specific research themes addressed in the study are as follows:

• Mobile phone profile
• Landline (home) phone use
• Uses and frequency of uses of the mobile phone
• Type of purchases made on the mobile phone
• Planned future uses of the mobile phone
• Use of websites compared to the use of applications on the mobile phone
• Specific types of services, content and applications accessed on the mobile phone
• Applications downloaded and installed on the mobile phone
• Perceived value of the mobile phone
• When the mobile phone is used.

This year’s special topic – the use of the mobile phone compared to the tablet and personal computer, included capturing the following type of information:

• Ownership of the tablet and personal computer
• Top uses of the tablet, personal computer and mobile phone
• Type of purchases and purchase experience on the mobile phone, tablet and personal computer
• Preferred device for making online purchases
• Preferred device for a range of daily online activities
• Preferred type of advertising for the different devices
• Conversion rate of banner ads on the mobile phone, tablet and personal computer
• Overall preferred device.

It should also be noted that in line with the overall objective of the Survey, the AMPLI:

• Focuses on all Australians that own a mobile phone, not only smartphone users.
• Provides industry stakeholders with external and independent validation of the mobile phone landscape in Australia.
• Collects a representative sample that can be generalised to Australian mobile phone owners between 18 and 75 years of age.
• Takes into account the changing digital landscape by including current topical questions each year.
• Includes some user-segmentation (profiling) to help companies understand the mobile phone behaviours of their customer groups. The profiling tool used is geoTribes, developed by RDA Research, a leading Australian supplier of geo-demographic solutions for companies.

More about geoTribes

The geo-demographic segmentation applies to Australians 18 and over, and is based on a sophisticated spatial modelling process that combines Australian Bureau of Statistic Census demographic data with lifecycle stage and socioeconomic status data from the Household Expenditure Survey. The 15 geo-tag profiles were introduced to the AMPLI for the first time in 2011. They have been applied to all of the Survey respondents aged 18+ years that have at the least, supplied age, gender and postcode details.

Most of the alignment to the tribes also drew on additional information supplied by the respondents like suburb and housing type.
Analysis of mobile phone behavior by these geoTribes is presented for some of the results throughout the report. Descriptions of the 15 geoTribes are provided in the picture and table below.

Such profiling analysis provides companies and the industry with an important understanding of how different segments of Australians are using mobile phones and what this may mean for their mobile strategy.

**Summary Description Of The geoTribes**

<table>
<thead>
<tr>
<th>geoTribe</th>
<th>Summary Description of geoTribe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achievers</td>
<td>Ambitious younger &amp; middle aged families</td>
</tr>
<tr>
<td>Boomers</td>
<td>White collar post family pre-retirees</td>
</tr>
<tr>
<td>Crusaders</td>
<td>Career-oriented singles &amp; couples</td>
</tr>
<tr>
<td>Debsstars</td>
<td>Financially extended younger families</td>
</tr>
<tr>
<td>Fortunats</td>
<td>Financially secure retirees &amp; pre-retirees</td>
</tr>
<tr>
<td>Grey Power</td>
<td>Better off retirees</td>
</tr>
<tr>
<td>Independents</td>
<td>Young singles &amp; couples</td>
</tr>
<tr>
<td>Preppies</td>
<td>Mature children of affluent parents</td>
</tr>
<tr>
<td>Rockafellas</td>
<td>Affluent mature families</td>
</tr>
<tr>
<td>Sleard Meanz</td>
<td>People living in under-privileged circumstances</td>
</tr>
<tr>
<td>Struggleville</td>
<td>Struggling young &amp; middle aged families</td>
</tr>
<tr>
<td>Suburban Splendour</td>
<td>Middle class mature families</td>
</tr>
<tr>
<td>Survivors</td>
<td>Retirees living on minimal incomes</td>
</tr>
<tr>
<td>True Blues</td>
<td>Blue collar mature families &amp; pre-retirees singles or couples</td>
</tr>
<tr>
<td>Twixters</td>
<td>Mature children living at home</td>
</tr>
</tbody>
</table>

**geoTribe Profiles**

- **T2 Achievers**: Ambitious younger & middle aged families. Higher SES with high levels of household & personal income. High household spend. Younger children. High mortgage payments, credit card debt & consumer loans.
- **T3 Fortunats**: Financially secure retirees & pre-retirees. Incomes primarily from superannuation & investments. Spend on recreation, healthcare, wine & holidays. Read newspapers & make charitable donations.
- **T4 Crusaders**: Career-oriented singles & couples. High earned incomes & hours worked. Spend on fast food, cinemas, recreation & Internet purchases. Higher occupational status, especially professionals.
- **T5 Preppies**: Mature children of affluent parents. Privately schooled, university educated. Orientated to words & recreation & travel. Living with their affluent parents & certain of a good place in life.
- **T7 Suburban Splendour**: Middle class mature families. Middle aged families with dependent children. Have computer games, mobile phones, DVD players & Pay TV. Spend on snack & fast food, school fees, vehicle maintenance & children’s clothing. High mortgage debt & interest payment on credit.
- **T9 debtStars**: Financially extended younger families. Middle SES with high levels of mortgage, credit card & consumer debt. Infants & young children. Spend on fast food, snacks & confectionary, vehicle maintenance, homemaker goods & recreation.
- **T10 Boomers**: White collar post family pre-retirees. Middle SES singles & couples. Investments, especially in property, cash, investments & shares. Spend on recreation, newspapers & medical expenses.
- **T11 True Blues**: Blue collar mature families & pre-retirees singles or couples. Lower SES. Long working hours. Spend on vehicle maintenance, invest for retirement. Prospects of working into older age.
- **T14 Survivors**: Retirees living on minimal incomes. Subsistence living on government benefits. Spend on basics, healthcare, household services & food.
SURVEY DESIGN AND DISTRIBUTION

A pilot of the 2014 Survey was carried out during early September to ensure survey functionality, optimal usability and data integrity. The Survey was then activated and in the field for 18 days from Friday 19 September to Monday 6 October.

To be eligible to complete the Survey, respondents had to own a mobile phone and live in Australia.

The Survey consisted of primarily close ended and multiple-choice questions and took respondents approximately 15 minutes to complete. An incentive was offered to encourage potential respondents to participate in the study and also complete the Survey. The incentives provided for the 2014 Survey was the chance to win one of two 16GB Apple iPod Touches and one of two $250 Myer Gift Vouchers. Those respondents that completed the Survey were eligible to enter a draw for the prizes. A random draw was carried out to select the winners.

The 2014 Survey was distributed by the following mechanisms:

- AIMIA's databases and social media channels, including the AIMIA Mobile Industry Group database and networks
- Banner ads that were placed on a range of industry websites including carrier and media sites (for a full list refer to acknowledgements)
- Emails that were sent to previous AMPLI respondents who had opted in to receive research requests
- Emails that were sent to industry contacts who had previously indicated a willingness to distribute the Survey
- Promotion of the Survey link in online industry newsletters
- Promotion of the Survey by social media (e.g., Twitter).
SURVEY RESPONSE RATE

A total of 1459 respondents completed the 2014 Survey. There was a slight over-representation of respondents whose mobile phone carrier was Virgin. This over-representation has occurred to varying degrees in past years. Since 2011 the Survey data has been weighted to better reflect the carrier market share and in doing so facilitate easier interpretation of the results for all mobile stakeholders. The weighting of responses was once again undertaken this year. The number of responses received from respondents whose carrier was Virgin was reduced to better reflect market share.

What this means
The weighted sample size used for the 2014 analysis was 1405 respondents, a good sample size. The confidence interval for this sample is small (2.6).

For the socio-demographic profile of the respondents refer to Appendix 1.
INTERPRETING THE RESULTS

As you move through the report please remember the following:

- Tables and figures are reported as percentages unless otherwise stated. Due to rounding some totals may range from 99% to 101%.

- Rounding errors may also affect the total percent of collapsed categories. For example combining the frequency categories “at least 5 times a day” and “at least once a day” may not exactly equate to the sum of the rounded percentages for these categories.

- The figures reported in this publication include some respondents aged less than 18 and older than 74, but the Survey results are likely to best reflect mobile phone behaviour and preferences among the 18-75 year olds, and the generalisability of the results may not extend to older or younger Australians.

- Wherever possible and where of value (as considered by the author) comparisons have been made across the surveys. To aid readability, this comparison has usually been shown for the last three or four surveys. Please also remember that in order to capture the changing mobile phone market, there has been variation in the way that some of the information has been collected across the surveys. Consequently, not all questions are comparable across all surveys.
PRESENTATION OF THE RESULTS

The results of the research are presented in nine key sections:

- Section 1: About The Mobile Phones, Payment Plans And Carriers
- Section 2: About The Perceived Value Of The Mobile Phone
- Section 3: About The Use Of The Mobile Phone During Daily Activities
- Section 4: About How the Mobile Phone is Used
- Section 5: About the Specific Services Accessed
- Section 6: About The Applications Accessed
- Section 7: Special Topic – Mobile Phone Use Compared To The Tablet And Personal Computer
- Section 8: A Broader Look At Mobility
- Appendix 1: Socio-demographic Profile Of The Survey Respondents
SECTION 1: ABOUT THE MOBILE PHONES, PAYMENT PLANS AND CARRIERS

This section includes the mobile phone profile of the respondents, which includes:

- Smartphone ownership
- Landline (home) phone use
- Handset brand ownership
- Mobile phone carrier
- Satisfaction with carrier services
- Payment of monthly phone bills
- Monthly phone spend
- Data inclusion in payment options
- Purchase of additional data allowance or data pack.

SMARTPHONE OWNERSHIP

For the last four years respondents have been asked if their mobile phone was a smartphone. A smartphone was defined in the Survey as a “mobile telephone with built-in applications and Internet access – more like a handheld computer integrated with a mobile telephone.”

The results are shown in Figure 1.

Figure 1: Smartphone Ownership Across Surveys
Comments
There has been no increase in smartphone ownership over the last year. 89% of respondents owned a smartphone, which is consistent with 88% of respondents last year. This follows three years of steady increases in smartphone ownership from 67% in 2011 to 88% last year.

There is some industry debate about the exact current ownership figure in Australia. However, it is uncontestable to say that smartphone uptake has been considerably rapid among Australians. It is important to keep in mind that the figure reported in this publication is a reflection of smartphone ownership among the 18-75 year olds, and the generalisability of the result may not extend to older or younger Australians.

The recorded ownership figures will also vary depending on whether it is being measured as a percentage of the overall number of mobile phone subscriptions in Australia (higher than the total number of Australians) or as a percentage of all Australians or just adult Australians.

Respondents that did not own a smartphone were asked if they planned to purchase a smartphone in the next 12 months. Although the planned purchase does not necessarily correlate with actual purchase, it does indicate intent, interest and overall mindset. The results are shown in Figure 2.

Figure 2: Planned Smartphone Purchase In The Next 12 Months

Comments
Of those respondents that did not own a smartphone, 32% plan to purchase one in the next 12 months. Based on the 2014 survey results, 92% of respondents would own a smartphone by October 2015.
LANDLINE (HOME) PHONE USE

Respondents were asked if they used a landline (home) phone in addition to their mobile phone. This is the first time questions relating to landline phones were asked in the Survey. They were designed to explore the apparent trend among Australians towards the use of only a mobile phone as opposed to the use of a landline (home) phone and mobile phone. Figure 3 shows the results.

Figure 3: Landline (Home) Phone Use

Comments

The results suggest that the landline phone is not used or not used very often by most respondents. Around one third of respondents have a mobile phone only, while almost 50% of respondents use a landline phone, but don't use it a lot.

Those respondents that used the landline phone were asked what they used their landline phone for. Their responses are shown in Figure 4.

Figure 4: The Use Of The Landline Phone

Comments

Most of the respondents that use the landline phone used it for phone calls or phone calls and connecting to the Internet. Less than 20% of respondents used their landline phone for connecting to the Internet only.
HANDSET BRAND

Respondents were asked to record the brand of their mobile phone. Table 1 provides a comparison of brands across the last five Surveys. Figure 5 shows brand ownership of three key brands over the last four years.

Table 1: Mobile Phone Brand Ownership Across Surveys

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Apple</td>
<td>21%</td>
<td>32%</td>
<td>40%</td>
<td>45%</td>
<td>49%</td>
</tr>
<tr>
<td>Samsung</td>
<td>12%</td>
<td>13%</td>
<td>18%</td>
<td>28%</td>
<td>25%</td>
</tr>
<tr>
<td>Nokia</td>
<td>41%</td>
<td>28%</td>
<td>16%</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>HTC</td>
<td>2%</td>
<td>8%</td>
<td>11%</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Sony Ericsson</td>
<td>9%</td>
<td>5%</td>
<td>3%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>LG</td>
<td>6%</td>
<td>4%</td>
<td>4%</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Motorola</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Blackberry</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
<td>1%</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Figure 5: Mobile Phone Brand Ownership Of Key Brands Across Surveys

Comments

The results show the continued and steady increase in popularity of Apple handsets over the last five years. They remain the clear market leader with almost 50% of respondents owning an Apple handset. The second key player in the handset market is Samsung, with 25% of respondent ownership. However, the growth rate of Apple ownership continues to slow, while Samsung handset brand ownership did not increase from last year and actually experienced a slight decline. All other handset brands appear to be struggling for market share.
MOBILE PHONE CARRIER

As in previous years respondents were asked to record their telecommunications provider. The results for 2014 are presented in Figure 6.

Figure 6: Mobile Phone Carrier

Comments

The breakdown by mobile phone providers is broadly in line with Australian market share figures. In 2014 the Virgin Mobile respondents were again over-represented in the survey, but less so this year. However, as per the previous two years the decision was made to weight the Virgin Mobile data in line with the market share to facilitate easy interpretation of the results.

SATISFACTION WITH CARRIER SERVICES

Respondents were asked to indicate if they were satisfied with a range of different mobile phone service related issues. Figure 7 shows the level of satisfaction among the 2014 respondents with each of the listed carrier services. This information was collected for the first time in the Survey 2009 (Survey 5). Figure 8 shows those respondents that were satisfied\(^4\) with the service provided across the last four years.

Service satisfaction by individual carrier was also explored. The results for the 2014 analysis are shown in Figure 9. Comparison of the results to the 2013 Survey results is shown in Table 2.

\(^4\) Satisfaction was calculated by adding together those respondents that selected either “very satisfied” or “somewhat satisfied.”
Figure 7: Satisfaction With Services Provided By Carriers

Figure 8: Satisfaction With Services Provided By Carriers Across Surveys
Figure 9: Satisfaction With Carrier Services By Individual Carrier

Table 2: Satisfaction With Carrier Services By Individual Carrier Across Surveys

<table>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Telstra</td>
<td>Overall Satisfaction</td>
<td>Customer Service</td>
<td>Network Coverage</td>
<td>Range of Plans and Packages Available</td>
<td>Variety of Mobile Handsets Available</td>
<td>Cost of Accessing a Data Service on your phone</td>
<td>Cost of Voice Calls</td>
<td>Range of Content and Services available via the phone company’s portal or home page</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Telstra</td>
<td>82%</td>
<td>85%</td>
<td>64%</td>
<td>69%</td>
<td>85%</td>
<td>86%</td>
<td>61%</td>
<td>57%</td>
<td>68%</td>
<td>61%</td>
</tr>
<tr>
<td>Optus</td>
<td>85%</td>
<td>79%</td>
<td>71%</td>
<td>67%</td>
<td>69%</td>
<td>68%</td>
<td>67%</td>
<td>60%</td>
<td>71%</td>
<td>61%</td>
</tr>
<tr>
<td>Vodafone</td>
<td>62%</td>
<td>75%</td>
<td>47%</td>
<td>60%</td>
<td>36%</td>
<td>64%</td>
<td>52%</td>
<td>68%</td>
<td>54%</td>
<td>60%</td>
</tr>
<tr>
<td>Virgin</td>
<td>88%</td>
<td>88%</td>
<td>78%</td>
<td>72%</td>
<td>72%</td>
<td>77%</td>
<td>82%</td>
<td>76%</td>
<td>71%</td>
<td>52%</td>
</tr>
</tbody>
</table>

Comments

‘Overall satisfaction’ with carrier services is consistent with the results from last year: just over 80% of respondents were very satisfied or somewhat satisfied with the services provided by carriers. This represents a small increase since Survey 2011 (76%).

The 2014 Survey results were broadly consistent with the 2013 Survey results for the specific carrier services. There are, however, some interesting trends that appear to be emerging over the last few years. The percentage of respondents satisfied with:
• Customer service has increased slightly from 62% last year to 66% this year.
• ‘Network coverage’, ‘cost of voice calls’ and ‘overall satisfaction’, appears to be trending upwards, with small
  increases being recorded year-on-year since 2011.
• ‘Cost of accessing a data service’, ‘variety of mobile handsets available’ and ‘cost of accessing a data service’
  appears to be trending downwards, with small decreases being recorded year-on-year since 2011.

Satisfaction by individual carrier

Satisfaction with services by individual carrier clearly shows variation across the carriers for many of the services. For example:

• Overall satisfaction was higher among Virgin respondents (88%), followed closely by Telstra respondents
  (85%). Optus was the only carrier to record a decrease in overall satisfaction from 2013 to 2014.
• Satisfaction with the cost of accessing a data service decreased from Survey 2013 for all carriers except
  Vodafone. The substantial increase in satisfaction among Vodafone respondents from 2013 to 2014 means
  Vodafone is now on par with the satisfaction levels of the other carriers.
• Comparisons with the 2013 Survey results show that Vodafone has recovered considerably since last year\(^5\) with
  their overall satisfaction increasing from 62% last year to 75% this year. There was also a substantial increase in
  the percentage of Vodafone respondents satisfied with all the other listed services.
• Satisfaction among Virgin respondents was higher for some services compared to other carriers. Of particular
  note were the levels of satisfaction with their ‘customer service’ and ‘range of plans and packages available’,
  compared to the other carriers.
• Satisfaction with Telstra’s network coverage was again a standout service for the carrier and also higher
  compared to the other providers.

PAYMENT OF MOBILE PHONE BILLS

Respondents were asked to record how they paid for their phone bill. Figure 10 shows the results for the last five
Surveys.

Figure 10: Payment Of Phone Bill Across The Last Five Surveys

\(^5\) The 2013 Survey recorded a substantial decrease in satisfaction among the Vodafone respondents, which was most likely due to the network related
issues they had experienced.
Comments
Overall the results are broadly consistent, especially across the last four years. Approximately a quarter of respondents reported that they were on prepaid payment options, while approximately 75% of respondents were on monthly bill options.

MONTHLY PHONE SPEND

For the last four surveys respondents have been asked to indicate the amount of their typical monthly phone spend. The results are shown in Figure 11.

Figure 11: Typical Monthly Phone Spend Across Surveys

Comments
The pattern of spend is broadly similar across the four surveys; 75-80% of respondents have a typical monthly phone bill of $80 or less. However, a closer look at the monthly spend suggests a possible downward trend in this group:

- Survey 2011 – 80% of respondents spend less than $80 per month
- Survey 2012 – 78% of respondents spend less than $80 per month
- Survey 2013 – 78% of respondents spend less than $80 per month
- Survey 2014 – 75% of respondents spend less than $80 per month

A breakdown of this group into smaller spending categories shows that from 2011-2013 there was a year-on-year reduction in the proportion of respondents spending $60 or less per month. This could be largely explained by the decreasing trend in the $41-$60 category and an increase in the proportion of respondents who were spending between $61 and $100 per month. However, there has been little change from 2013 to 2014. The 2014 figures for the $81 per month plus categories are also consistent with last year. This suggests that many Australians may have reached their current limit in terms of phone expenditure and may continue to explore the functionality of their phones (and appealing plans) within these cost parameters.
DATA INCLUSION IN PAYMENT OPTIONS

Respondents were asked if an allowance for mobile data is included in their monthly bill or pre-paid amount. Specific questions regarding data allowance have been asked since the 2009 Survey (Survey 5). The decision to include these questions was a direct response to the increasing maturity of the market in terms of the carrier communications around pricing plans and options, and equally as important, the increasing engagement of mobile phone owners with services and content on their mobile phones.

Their responses are shown in Figure 12.

**Figure 12: Inclusion Of Data In Payment Options Across Surveys**

![Bar chart showing percentage of respondents with data allowance included in payment options across surveys](chart)

<table>
<thead>
<tr>
<th>Survey</th>
<th>Percentage (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey 2009</td>
<td>31%</td>
</tr>
<tr>
<td>Survey 2010</td>
<td>47%</td>
</tr>
<tr>
<td>Survey 2011</td>
<td>63%</td>
</tr>
<tr>
<td>Survey 2012</td>
<td>75%</td>
</tr>
<tr>
<td>Survey 2013</td>
<td>84%</td>
</tr>
<tr>
<td>Survey 2014</td>
<td>82%</td>
</tr>
</tbody>
</table>

**Comments**

The percentage of respondents that have a data allowance included in their payment options appears to have stabilised this year at just over 80%. This followed substantial year-on-year growth from 2009 to 2013.

The respondents who had data included in their payment option were then asked how much data was included. The results are shown in Figure 13.
Figure 13: Amount Of Data Included In Monthly Payment Or Prepaid Options Across Surveys

Comments

The most notable change in the last 6 years was from 2010 to 2011: the percentage of respondents with between 1-3GB of data in their payment options more than doubled from 14% to 32%. This was offset by the substantial decrease in the proportion of respondents with less than 500MB. Between 2011 and 2013 the amount of growth in the more than 1GB categories continued, but the year-on-year increases were considerably smaller (around 6-7%).

In 2014 the percentage of respondents with less than 500MB continued to decrease, but there has also been a slight decrease in the more than 1GB categories from 57% in 2013 to 52% this year. The growth that offsets the continual decrease in the less than 500MB category has surprisingly been in the 501Mb to 1GB category, which increased from 7% in 2013 to 16% in 2014. This may be a reflection of the number of carrier packages that include 1GB of data or the increased awareness among Australians of the ‘value’ of 1GB data (and that in some cases more data is not required for the way they currently use their phones).
PURCHASE OF ADDITIONAL DATA ALLOWANCE OR DATA PACK

In 2014 respondents were once again asked if they had ever purchased a data allowance (or data pack) in addition to their regular payment. This question was asked in the 2009, 2010 and 2011 Surveys when the use of phone beyond texting and voice was becoming more prevalent in the Australian market. The question was revisited this year to track any substantial changes in the purchase of additional data beyond the payment plans of respondents. The results for 2014, compared to the results for the 2009, 2010 and 2011 Surveys are shown in Figure 14.

Figure 14: Purchase Of Additional Data Allowance Or Data Pack Across Surveys

Of the 2014 respondents, 30% stated that they had purchased a data allowance (or data pack) in addition to their regular payment. This figure has more than doubled since the question was last asked in the 2011 Survey.
SECTION 2: ABOUT THE PERCEIVED VALUE OF THE MOBILE PHONE

For the first time this year the Survey explored the perceived value of the mobile phone through the use of choice questions, which included:

- Choice between a mobile phone and a car
- Choice between a mobile phone and a television
- Choice between a mobile phone, a tablet or a personal computer
- Choice preferences by geoTribes.

As the mobile phone continues to become increasingly more embedded in our day-to-day activities it seemed timely to explore how Australians value the mobile phone, compared to some of their other potential valuables.

CHOICES

Respondents were asked to select between a mobile phone and a car, if they could only have one of the two. Their responses are shown in Figure 15.

Respondents were then asked to select between a mobile phone and a television, if they could only have one of the two. Their responses are shown in Figure 16.

Respondents were also asked to select between a mobile phone, a tablet and a personal computer, if they could only have one of the three devices. Their responses are shown in Figure 17.

Figure 15: Choice Between A Mobile Phone And A Car
Comments

When given the choice between a car and a mobile phone the clear majority (70%) of respondents would select a car. However, when given the choice between a mobile phone and television, about 60% of respondents chose a mobile phone. This suggests that while many may not be ready to give up their car for a phone, they are less connected to their televisions.

When given the choice between a mobile phone, a tablet and a personal computer, the tablet or ‘in-between’ device appeared to be by far the least ‘valued’ by respondents - only 16% would select the tablet if they had to choose between the three devices. Half of the respondents would select a mobile phone, and just over a third the personal computer. The use of the mobile phone compared to the personal computer and tablet is this year’s special topic and is explored in more detail later in the report.
The respondents who selected a mobile phone for each of the three choice options: mobile phone or a car, mobile phone or TV, mobile phone, tablet or personal computer, were analysed by geoTribe. Figure 18 shows the results. The geoTribe descriptors included in the introduction of the report are again included below to aid readability of the results.

**Summary Description Of The geoTribes**

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<td>White collar post family pre-retirees</td>
</tr>
<tr>
<td>Crusaders</td>
<td>Career-orientated singles &amp; couples</td>
</tr>
<tr>
<td>Debsstars</td>
<td>Financially extended younger families</td>
</tr>
<tr>
<td>Fortunats</td>
<td>Financially secure retirees &amp; pre-retirees</td>
</tr>
<tr>
<td>Grey Power</td>
<td>Better off retirees</td>
</tr>
<tr>
<td>Independents</td>
<td>Young singles &amp; couples</td>
</tr>
<tr>
<td>Preppies</td>
<td>Mature children of affluent parents</td>
</tr>
<tr>
<td>Rockafellas</td>
<td>Affluent mature families</td>
</tr>
<tr>
<td>Sleander Meanz</td>
<td>People living in under- privileged circumstances</td>
</tr>
<tr>
<td>Struggleville</td>
<td>Struggling young &amp; middle aged families</td>
</tr>
<tr>
<td>Suburban Splendour</td>
<td>Middle class mature families</td>
</tr>
<tr>
<td>Survivors</td>
<td>Retirees living on minimal incomes</td>
</tr>
<tr>
<td>True Blues</td>
<td>Blue collar mature families &amp; pre-retirees singles or couples</td>
</tr>
<tr>
<td>Twixters</td>
<td>Mature children living at home</td>
</tr>
</tbody>
</table>
**Comments**

Overall the geoTribe made up of pre-retirees and retiree respondents (Boomers, Grey Power, and Survivors) were least likely to select the mobile phone across the three choice questions. The Crusaders (career-orientated singles and couples), the independents (young singles and couples), Preppies (mature children of affluent parents) and the Twixters (mature children living at home) were more likely to select the mobile phone across the three choices, compared to some of the other geoTribe. In summary, it appears the perceived ‘value’ of the mobile phone was greater among young singles and/or couples and less ‘valued’ among the older based geoTribe regardless of their socio-economic status.
SECTION 3: ABOUT THE USE OF THE MOBILE PHONE DURING DAILY ACTIVITIES

For the first time this year the Survey also explored when respondents use their mobile phone in terms of their day-to-day activities. This includes whether respondents use their mobile phone (and how often) while engaging in such activities as:

- Watching TV
- Using your tablet or PC
- Eating a meal alone
- Eating a meal with others
- Travelling on public transport
- Travelling in the car
- While in bed.

Insights that relate to when Australians use their mobile phone is becoming increasingly relevant as more services, content and applications designed to facilitate their day-to-day decisions become available on the mobile phone.

WHEN THE MOBILE PHONE IS USED

Respondents were asked whether they used their mobile phone while doing a range of activities. Their responses are shown in Figure 19.
The results clearly suggest that many respondents use their mobile phone while doing something else. At least 74% of respondents use their mobile phone at least sometimes while watching TV, eating a meal alone, travelling on public transport and while in bed. More than 60% of respondents use their mobile phone at least sometimes while using their tablet or personal computer or travelling in the car. A third of respondents admit to using their mobile phone at least sometimes while eating with others.

The results also found that approximately 30% of respondents claimed that they always use their mobile phone while in bed, and watching TV, while 39% always use their phone while travelling on public transport.
SECTION 4: ABOUT HOW THE MOBILE PHONE IS USED

This section provides insight into how mobile phone owners are using their mobile phones, including:

- Overall use of the mobile phone
- Top 5 ways respondents use their mobile phones
- Frequency of use of the mobile phone for specific purposes
- Types of purchases made on the mobile phone
- Use of websites compared to the use of applications on the mobile phone
- Expected use and preferences of the mobile phone
  - Expected future use of the mobile phone
    - Interest and/or use of the mobile phone as a credit card, EFTPOS card or TV remote control
  - Preference in brand engagement.
- Mobile phone use by geoTribe
- Looking into the future.

OVERALL USE OF THE MOBILE PHONE

Respondents were asked how often they used their mobile phone for a range of listed purposes. Respondents have been asked this series of questions since 2005, although the listed uses have been modified throughout the years to account for changes in the market place.

Figure 20 shows the overall proportion of 2014 respondents that used the phone for each specific purpose within the last 12 months, compared to previous years. This involved re-analysis of the 2011 data so that the categories were aligned with the categories used in the 2012, 2013 and 2014 Surveys. This meant that the multiple categories used in the 2011 Surveys around visiting websites, browsing, searching, banking and purchasing were collapsed into the three categories used since the 2012 Survey:

- To visit websites and/browse or search the internet
- For banking including transfers and bill payments
- To buy things online.

The changes to the 2012 Survey (and maintained in the 2013 and 2014 Surveys) were made to reflect the change in the market in terms of how people behave, interact and think about their mobile phone interactions.
Comments
Overall, the results for 2013 and 2014 are consistent suggesting that 2014 has been a year of consolidation with minimal or no change in the percentage of respondents who have used the mobile phone for any of the listed services. The only exceptions being the use of the mobile phone for banking and to buy things online, which showed a small increase in use. This follows a period of substantial growth between 2011 and 2013 in the percentage of respondents who used the phone ‘in the last 12 months’, for every listed purpose beyond texting and voice.

Note: Since the 2012 Survey “To read or edit documents” was added to the list of phone uses.

6 Almost all respondents were already using voice and texting so there was almost no room for growth.
TOP 5 WAYS RESPONDENTS USE THEIR MOBILE PHONES

Since the 2012 Survey respondents have also been asked to rank the top 5 ways they use their mobile phone from a selected list. Figure 20 shows the proportion of respondents who ranked each phone use: 1, 2, 3, 4 or 5. Figure 21 shows a comparison between the 2013 and 2014 Survey results. The comparison is based on the combined top two ranks of mobile phone use.

Figure 21: Rank Of Top 5 Mobile Phone Uses

Figure 22: Combined Top Two Ranks Of Top 5 Mobile Phone Uses Across Surveys

---

7 The list used was the same list of phone purposes used earlier in the Survey to capture overall phone uses and frequency of uses.
Comments
70% of the number one rankings were either SMS or Voice calls. Voice and SMS also dominated the second ranking spot, making up almost 50% of the number two rankings.

Using the mobile to ‘send and receive emails’ made up the second tier of mobile phone use with just over 25% of respondents ranking emailing as their first or second rank. The third tier of use was to ‘to get information’ and ‘for entertainment’. Approximately 15% of respondents ranked each of these in their top 1 or 2 uses of the mobile phone.

A comparison of combined 1 and 2 ranks across the listed mobile phone uses for the 2013 and 2014 Survey results shows little change in how respondents rank their uses of the mobile phone. The results confirm that voice and SMS remain entrenched as the top uses of the mobile phone for many respondents.

FREQUENCY OF USE OF THE MOBILE PHONE FOR SPECIFIC PURPOSES

Respondents were asked to identify how often they use their mobile phone for a specific purpose. A detailed breakdown of the frequency of use for each specific purpose is presented in Table 3.

Figure 23 shows the percentage of respondents that are high-level users of the mobile phone for each of the specific purposes across the last three years. High-level users are defined as those that use the mobile phone for that specific purpose at least once a day⁴. Figure 23 shows the percentage of medium-level uses for each of the listed phone purposes. Medium-level users were defined as those that used the mobile phone for the given purpose “at least once a week” plus “at least once a month”.

Table 3: Frequency Of Mobile Phone Uses (As A Percentage Of Respondents)

<table>
<thead>
<tr>
<th>Header</th>
<th>At least 5 times a day</th>
<th>At least once a day</th>
<th>At least once a week</th>
<th>At least once a month</th>
<th>At least once every few months</th>
<th>At least once a year</th>
<th>Not at all in the last 12 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice Calls</td>
<td>22%</td>
<td>44%</td>
<td>24%</td>
<td>5%</td>
<td>2%</td>
<td>0%</td>
<td>2%</td>
</tr>
<tr>
<td>SMS (texting)</td>
<td>46%</td>
<td>34%</td>
<td>14%</td>
<td>3%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>To Send and Receive Emails</td>
<td>36%</td>
<td>26%</td>
<td>10%</td>
<td>5%</td>
<td>3%</td>
<td>1%</td>
<td>19%</td>
</tr>
<tr>
<td>To Get Information</td>
<td>40%</td>
<td>28%</td>
<td>12%</td>
<td>4%</td>
<td>2%</td>
<td>1%</td>
<td>12%</td>
</tr>
<tr>
<td>For Entertainment Purposes</td>
<td>33%</td>
<td>26%</td>
<td>14%</td>
<td>6%</td>
<td>2%</td>
<td>2%</td>
<td>17%</td>
</tr>
<tr>
<td>To Visit Websites and/or Browse or Search the Internet</td>
<td>39%</td>
<td>27%</td>
<td>11%</td>
<td>5%</td>
<td>3%</td>
<td>1%</td>
<td>14%</td>
</tr>
<tr>
<td>For Banking Including Transfers &amp; Bill Payments</td>
<td>6%</td>
<td>20%</td>
<td>27%</td>
<td>11%</td>
<td>4%</td>
<td>1%</td>
<td>30%</td>
</tr>
<tr>
<td>To Buy Things Online</td>
<td>3%</td>
<td>6%</td>
<td>15%</td>
<td>20%</td>
<td>10%</td>
<td>5%</td>
<td>41%</td>
</tr>
<tr>
<td>To Read or Edit Documents or Files</td>
<td>6%</td>
<td>12%</td>
<td>18%</td>
<td>13%</td>
<td>9%</td>
<td>4%</td>
<td>38%</td>
</tr>
</tbody>
</table>

⁴ In the last 3 years this means adding together the category “at least 5 times a day” with “at least once a day.”
**Figure 23: High-Level Users Of The Mobile Phone Across The Surveys (As A percentage Of Those That Use The Phone For That Given Purpose)**

**Figure 24: Medium-Level Users Of The Mobile Phone Across The Surveys (As A Percentage Of Those That Use The Phone For That Given Purpose)**

**Comments**

The overall pattern of high-level and medium-level uses of the mobile phone for the listed purposes remain consistent with the previous few years. In summary, between 59% and 80% of respondents are high-level users of the mobile phone for the established uses of the mobile phone like voice calls, SMS, to send and receive emails, to get information and to visit websites and/or browse and/or search the Internet. This compares to considerably lower percentages of high-level users for the emerging uses like banking (26%), buying things online (9%) and to read or edit documents or files (18%).
The overall pattern is reversed for the medium-level users although the disparity between the established and evolving mobile phone uses is not so extreme. Around 50-60% of respondents are medium-level users of the emerging phone uses like banking, buying things online and to read or edit documents or files. This compares to 30% or less of medium-level users for the remaining more established uses of the phone including voice calls, SMS, to send and receive emails, to get information and to visit websites and/or browse and/or search the Internet.

Variations Within the Overall Patterns of High-Level and Medium-Level Use

There were some variations within the overall patterns of use that may be of interest to readers.

High-Level Users

The results from the 2014 Survey are either consistent or have slightly declined when compared with the 2013 Survey results. The only exception is the percentage of high-level users of the mobile phone for entertainment, which increased from 67% in 2013 to 72% in 2014. Of particular interest is the decline in the percentage of high-level users of the mobile phone for emerging uses like banking: 27% down from 34% last year and buying things online, 9% down from 13% last year.

Also of interest is the substantial decrease in the proportion of high-level users of the mobile phone ‘to read or edit documents or files,’ 18% down from 30% last year and the previous year. This may be a reflection of an increased use of the tablet for this purpose.

Medium-Level Users

The trends for medium-level use across the listed phone uses was mixed. The results were consistent with last year for some of the uses including:

• ‘To get information’
• ‘To visit websites and/or browse or search the Internet’
• ‘To read or edit documents’.

However, medium-level use appears to be trending upwards for some of the listed phone uses including:

• Voice calls - 30% up from 26% last year
• SMS (texting) - 17% up from 14% last year
• To send and receive emails -19% up from 16% last year
• To buy things online – 60% up from 57% last year.

The remaining phone uses recorded a slight decrease in medium-level users: the percentage of medium level uses of the mobile phone:

• For entertainment - 24% down from 27% last year
• For banking including transfers and bill payments – 53% down from 58% last year.
TYPE OF PURCHASES MADE ON THE MOBILE PHONE

The act of buying things online on the mobile phone was further explored in the Survey. Overall, the proportion of respondents who have made a successful purchase on their mobile phone ‘in the last 12 months’ increased slightly from 54% in 2013 to 58% in 2014. Figure 25 shows the type of purchases these respondents made.

Figure 25: Type of Purchases Made On The Mobile Phone Across Surveys (As A Percentage Of Those That Made A Successful Purchase In The Last 12 Months)

Comments
The overall pattern of purchases is similar to last year. The most popular type of purchases were ‘tickets’, ‘digital content for their phone’ and ‘clothes, shoes and jewellery’ and the least popular type of content purchased were DVDs, toys and groceries. However, within this overall purchase pattern there have been some notable changes compared to last year:

- Ticket purchases increased from 53% in 2013 to 60% in 2014
- Clothes, shoes and jewellery increased from 32% in 2013 to 41% in 2014
- Digital content for their phone decreased from 65% in 2013 to 54% in 2014
- Books decreased from 34% in 2013 to 25% in 2014.

USE OF WEBSITES VERSUS APPLICATIONS

A continued topical issue in the media and industry has been around the use and popularity of websites versus applications, and the resulting implications for businesses (i.e., invest in an application, website or both). In response, since 2012 the AMPLI Survey has asked respondents whether they use more websites or applications on their mobile phones. The responses are captured in Figure 26.
Comments
The overall pattern of website versus application use is similar across the Surveys:

- Less than 5 percent of respondents use applications only
- Around one quarter of respondents use mostly applications and some websites
- Around one quarter of respondents use about the same use of websites and applications
- Less than 9% of respondents use websites only.

The proportion of respondents using websites and/or applications on their mobile phone is 88%, which is consistent with the results from last year. In 2012 the figure was 77% of respondents.

EXPECTED USE AND PREFERENCES OF THE MOBILE PHONE

In this section expected and preferred uses of the mobile phone are captured. This includes:

- Expected future use of the mobile phone
- Interest in the use of the mobile phone as a credit card, EFTPOS card or TV remote control
- Preference in brand engagement.

Expected Future Use Of The Mobile Phone Relative To Current Use
Figure 27 provides a picture of how the respondents intend to use their mobile phones in the next 12 months relative to their current use. This question was first asked of respondents in 2012. Although actual and intended use is unlikely to directly correlate, it provides an indication of the interests and intent of respondents.
Some interesting insights follow.

- Many respondents plan to increase their current uses of the mobile phone.
  - Approximately 20% of the respondents currently using their mobile phone for emailing, getting information, and visiting websites/browsing/searching intend to increase their use of the phone for these purposes in the next 12 months.
  - Between 14-17% of the respondents currently using their mobile phone for voice calls, SMS, entertainment, banking and buying things online intend to increase their use of the phone for these purposes in the next 12 months.

- Only a very small percentage of respondents (2-5%) plan to decrease their use of the mobile phone for any given purpose.

- Only a small percentage of respondents (2-3%) plan to start using the phone for new uses for which they don’t currently use their phones.

**Interest In The Use Of The Mobile phone As A Credit Card, EFTPOS Card Or TV Remote Control**

For the first time this year Survey respondents were asked if they would use their mobile phone as a credit card, EFTPOS card or TV remote control. The inclusion of this question in the Survey reflects the increasing industry and media interest in the extended use of the mobile phone as a replacement device for things like a wallet or TV remote. Figure 28 shows the results of this question.
Figure 28: Interest In The Use Of The Mobile Phone As A Credit Card, EFTPOS Card Or TV Remote Control

Comments
Almost 40% of respondents would like to be able to use their mobile phone as an EFTPOS card or TV remote control, while just over a third of respondents would like to use their phones as a credit card. The results also suggest that 14% of respondents are already using their mobile phones as a TV remote control, while 5% and 7% respectively are already using their phones as an EFTPOS card and credit card.

Preferred Engagement With Brands
For the first time this year respondents were also asked where they would prefer to receive an offer on their mobile phone from a brand they like. Their responses are captured in Figure 29.

Figure 29: Preferred Location To Receive An Offer From A Brand Liked By The Respondents

Comments
Almost half of the respondents were not interested in receiving any offer on their mobile phone from a brand they liked. The two most preferred locations to receive an offer were in the respondent’s home (22%) and near the brand’s store (20%).
MOBILE PHONE USE BY GEOTRIBE

In this section mobile phone use by geoTribes is presented for the 2014 Survey results. Mobile phone use by geoTribes includes:

- Overall mobile phone use by geoTribes in the last 12 months
- High-level users within each geoTribes.

The summary description of the geoTribes included earlier in the report is again shown below to aid in readability.

Summary Description Of The geoTribes

<table>
<thead>
<tr>
<th>geoTribes</th>
<th>Summary Description of geoTribes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achievers</td>
<td>Ambitious younger &amp; middle aged families</td>
</tr>
<tr>
<td>Boomers</td>
<td>White collar post family pre-retirees</td>
</tr>
<tr>
<td>Crusaders</td>
<td>Career-orientated singles &amp; couples</td>
</tr>
<tr>
<td>Debstars</td>
<td>Financially extended younger families</td>
</tr>
<tr>
<td>Fortunats</td>
<td>Financially secure retirees &amp; pre-retirees</td>
</tr>
<tr>
<td>Grey Power</td>
<td>Better off retirees</td>
</tr>
<tr>
<td>Independents</td>
<td>Young singles &amp; couples</td>
</tr>
<tr>
<td>Preppies</td>
<td>Mature children of affluent parents</td>
</tr>
<tr>
<td>Rockafellas</td>
<td>Affluent mature families</td>
</tr>
<tr>
<td>Sleander Meanz</td>
<td>People living in under-privileged circumstances</td>
</tr>
<tr>
<td>Struggleville</td>
<td>Struggling young &amp; middle aged families</td>
</tr>
<tr>
<td>Suburban Splendour</td>
<td>Middle class mature families</td>
</tr>
<tr>
<td>Survivors</td>
<td>Retirees living on minimal incomes</td>
</tr>
<tr>
<td>True Blues</td>
<td>Blue collar mature families &amp; pre-retirees singles or couples</td>
</tr>
<tr>
<td>Twixters</td>
<td>Mature children living at home</td>
</tr>
</tbody>
</table>

Overall Mobile Phone Use By geoTribes

Table 4 shows overall mobile phone use in the last 12 months by geoTribes. The overall mobile phone use by geoTribes is also illustrated across Figures 30 to 32.
Table 4: Overall Mobile Phone Use By geoTribe

<table>
<thead>
<tr>
<th>GeoTribe</th>
<th>Voice calls</th>
<th>SMS</th>
<th>To send and receive emails</th>
<th>To get information</th>
<th>For entertainment purposes</th>
<th>To visit websites, browse or search the Internet</th>
<th>For banking including transfers &amp; bill payments</th>
<th>To buy things online</th>
<th>To read or edit documents or files</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achievers</td>
<td>100%</td>
<td>99%</td>
<td>93%</td>
<td>97%</td>
<td>97%</td>
<td>97%</td>
<td>86%</td>
<td>72%</td>
<td>71%</td>
</tr>
<tr>
<td>Boomers</td>
<td>95%</td>
<td>96%</td>
<td>58%</td>
<td>68%</td>
<td>49%</td>
<td>65%</td>
<td>42%</td>
<td>25%</td>
<td>32%</td>
</tr>
<tr>
<td>Crusaders</td>
<td>97%</td>
<td>100%</td>
<td>95%</td>
<td>97%</td>
<td>96%</td>
<td>97%</td>
<td>89%</td>
<td>83%</td>
<td>85%</td>
</tr>
<tr>
<td>Debtstars</td>
<td>98%</td>
<td>100%</td>
<td>90%</td>
<td>95%</td>
<td>96%</td>
<td>95%</td>
<td>81%</td>
<td>72%</td>
<td>72%</td>
</tr>
<tr>
<td>Fortunats</td>
<td>100%</td>
<td>99%</td>
<td>72%</td>
<td>80%</td>
<td>63%</td>
<td>72%</td>
<td>50%</td>
<td>39%</td>
<td>43%</td>
</tr>
<tr>
<td>Grey Power</td>
<td>98%</td>
<td>87%</td>
<td>44%</td>
<td>49%</td>
<td>29%</td>
<td>38%</td>
<td>31%</td>
<td>16%</td>
<td>24%</td>
</tr>
<tr>
<td>Independents</td>
<td>96%</td>
<td>98%</td>
<td>94%</td>
<td>96%</td>
<td>96%</td>
<td>93%</td>
<td>80%</td>
<td>81%</td>
<td>80%</td>
</tr>
<tr>
<td>Preppies</td>
<td>95%</td>
<td>99%</td>
<td>92%</td>
<td>97%</td>
<td>97%</td>
<td>97%</td>
<td>80%</td>
<td>75%</td>
<td>76%</td>
</tr>
<tr>
<td>Rockafellas</td>
<td>100%</td>
<td>100%</td>
<td>83%</td>
<td>93%</td>
<td>91%</td>
<td>92%</td>
<td>70%</td>
<td>58%</td>
<td>65%</td>
</tr>
<tr>
<td>Slender Meanz*</td>
<td>97%</td>
<td>100%</td>
<td>67%</td>
<td>79%</td>
<td>73%</td>
<td>76%</td>
<td>67%</td>
<td>55%</td>
<td>45%</td>
</tr>
<tr>
<td>Struggleville</td>
<td>97%</td>
<td>100%</td>
<td>87%</td>
<td>90%</td>
<td>91%</td>
<td>90%</td>
<td>80%</td>
<td>68%</td>
<td>71%</td>
</tr>
<tr>
<td>Suburban Splendour</td>
<td>98%</td>
<td>99%</td>
<td>67%</td>
<td>84%</td>
<td>76%</td>
<td>78%</td>
<td>52%</td>
<td>36%</td>
<td>45%</td>
</tr>
<tr>
<td>Survivors*</td>
<td>92%</td>
<td>89%</td>
<td>34%</td>
<td>53%</td>
<td>29%</td>
<td>37%</td>
<td>18%</td>
<td>13%</td>
<td>18%</td>
</tr>
<tr>
<td>True Blues</td>
<td>95%</td>
<td>98%</td>
<td>66%</td>
<td>79%</td>
<td>69%</td>
<td>78%</td>
<td>54%</td>
<td>39%</td>
<td>41%</td>
</tr>
<tr>
<td>Twisters</td>
<td>97%</td>
<td>100%</td>
<td>94%</td>
<td>95%</td>
<td>95%</td>
<td>95%</td>
<td>83%</td>
<td>73%</td>
<td>75%</td>
</tr>
<tr>
<td>Total</td>
<td>97%</td>
<td>98%</td>
<td>81%</td>
<td>88%</td>
<td>83%</td>
<td>85%</td>
<td>70%</td>
<td>59%</td>
<td>62%</td>
</tr>
</tbody>
</table>

* = overall tribe group has less than 50 members

Figure 30: Overall Use Of The Mobile Phone By geoTribe For Voice, Text And Emails
Figure 31: Overall Use Of The Mobile Phone By geoTribe for Information, Entertainment And Website Visits/Internet Browsing

Figure 32: Overall Use Of The Mobile Phone By geoTribe for Banking, Buying Things Online And Reading/Editing Documents

Comments
The findings show:

- All geoTribes were represented across every listed phone use in the last 12 months. This means that respondents from a cross section of lifestyles and stage of life are using the mobile phone for the listed purposes, although to varying degrees as can be expected.
- For voice and text there is little variation in usage levels across the geoTribes, with at least 95% of respondents...
regardless of their geoTribes using the phone for voice and text in the last 12 months. The only exceptions were the use of texting by the Grey Power (87%) and the use of texting (89%) and voice (92%) by the Survivors. In the use of email the differences across the geoTribes were more notable, in particular the Boomers, Grey Power, Survivors (and to a lesser extent) the Slender Meanz, had substantially lower percentages of users sending and receiving emails on their phones.

The overall pattern of use by geoTribes is almost identical for the remaining following uses: to get information, for entertainment, website visits/internet searching, banking, buying things online and reading or editing documents.

- The Survivors and the Grey Power (and to a lesser extent) the Boomers and the Slender Meanz have the lowest percentage of users of the phone for these purposes, compared to the other geoTribes.
- In summary, the older Australians (retirees and pre-retirees) and/or the Australians struggling financially are those less likely to use their phone beyond voice and texting. This is important if service providers targeting the aged intend to attempt to change business models i.e., use the phone to help keep people at home longer.

High-Level Users Within Each geoTribes

Table 5 shows the high-level users within each geoTribes. The results are also illustrated across Figures 33 to 35.

It addresses the question of “how many high-level users are within each geoTribes for each phone use?” The figure for “high-level users” of each purpose was again calculated by summing together those that stated they used the mobile phone for the given purpose “at least 5 times a day” and those that used it “at least once a day”.

Understanding how many high-level users are within each geoTribes may be of interest to industry stakeholders for the purpose of understanding their current customers so that appropriate education and action strategies can be devised to either aid current customers make the best use of their phones and/or attract different types of customers to services offered on the mobile phone.

<table>
<thead>
<tr>
<th>GeoTribes</th>
<th>Voice calls</th>
<th>SMS</th>
<th>To send and receive emails</th>
<th>To get information</th>
<th>For entertainment purposes</th>
<th>To visit websites, browse or search the Internet</th>
<th>For banking including transfers &amp; bill payments</th>
<th>To buy things online</th>
<th>To read or edit documents or files</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achievers</td>
<td>73%</td>
<td>88%</td>
<td>82%</td>
<td>87%</td>
<td>77%</td>
<td>88%</td>
<td>36%</td>
<td>15%</td>
<td>24%</td>
</tr>
<tr>
<td>Boomers</td>
<td>62%</td>
<td>69%</td>
<td>73%</td>
<td>60%</td>
<td>34%</td>
<td>52%</td>
<td>19%</td>
<td>11%</td>
<td>32%</td>
</tr>
<tr>
<td>Crusaders</td>
<td>66%</td>
<td>86%</td>
<td>87%</td>
<td>90%</td>
<td>84%</td>
<td>90%</td>
<td>45%</td>
<td>15%</td>
<td>32%</td>
</tr>
<tr>
<td>Debtstars</td>
<td>72%</td>
<td>93%</td>
<td>75%</td>
<td>87%</td>
<td>75%</td>
<td>82%</td>
<td>46%</td>
<td>15%</td>
<td>31%</td>
</tr>
<tr>
<td>Fortunats</td>
<td>72%</td>
<td>81%</td>
<td>69%</td>
<td>74%</td>
<td>52%</td>
<td>64%</td>
<td>29%</td>
<td>7%</td>
<td>39%</td>
</tr>
<tr>
<td>Grey Power</td>
<td>35%</td>
<td>44%</td>
<td>50%</td>
<td>37%</td>
<td>38%</td>
<td>52%</td>
<td>18%</td>
<td>0%</td>
<td>15%</td>
</tr>
<tr>
<td>Independents</td>
<td>69%</td>
<td>91%</td>
<td>77%</td>
<td>79%</td>
<td>83%</td>
<td>88%</td>
<td>40%</td>
<td>18%</td>
<td>30%</td>
</tr>
<tr>
<td>Proppies</td>
<td>67%</td>
<td>93%</td>
<td>81%</td>
<td>92%</td>
<td>87%</td>
<td>91%</td>
<td>48%</td>
<td>23%</td>
<td>31%</td>
</tr>
<tr>
<td>Rockafellas</td>
<td>79%</td>
<td>88%</td>
<td>91%</td>
<td>85%</td>
<td>73%</td>
<td>80%</td>
<td>32%</td>
<td>8%</td>
<td>29%</td>
</tr>
<tr>
<td>Slender Meanz*</td>
<td>66%</td>
<td>61%</td>
<td>64%</td>
<td>54%</td>
<td>58%</td>
<td>64%</td>
<td>27%</td>
<td>22%</td>
<td>27%</td>
</tr>
<tr>
<td>Struggleville</td>
<td>66%</td>
<td>80%</td>
<td>70%</td>
<td>77%</td>
<td>73%</td>
<td>74%</td>
<td>43%</td>
<td>22%</td>
<td>34%</td>
</tr>
<tr>
<td>Suburban Splendour</td>
<td>77%</td>
<td>86%</td>
<td>78%</td>
<td>58%</td>
<td>47%</td>
<td>59%</td>
<td>32%</td>
<td>10%</td>
<td>25%</td>
</tr>
<tr>
<td>Survivors*</td>
<td>66%</td>
<td>24%</td>
<td>15%</td>
<td>20%</td>
<td>27%</td>
<td>14%</td>
<td>29%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>True Blues</td>
<td>61%</td>
<td>71%</td>
<td>55%</td>
<td>64%</td>
<td>53%</td>
<td>52%</td>
<td>23%</td>
<td>10%</td>
<td>24%</td>
</tr>
<tr>
<td>Twisters</td>
<td>53%</td>
<td>78%</td>
<td>76%</td>
<td>82%</td>
<td>80%</td>
<td>87%</td>
<td>52%</td>
<td>20%</td>
<td>26%</td>
</tr>
<tr>
<td>Total</td>
<td>68%</td>
<td>81%</td>
<td>77%</td>
<td>78%</td>
<td>71%</td>
<td>77%</td>
<td>39%</td>
<td>15%</td>
<td>29%</td>
</tr>
</tbody>
</table>

* overall tribe group has less than 50 members
**Figure 33: High-Level Users Of The Mobile Phone For Voice, Text And Emails Within Each geoTribe**

**Figure 34: High-Level Users Of The Mobile Phone For Information, Entertainment And Website Visits/Internet Browsing Within Each geoTribe**
Comments
The findings show the following.

SMS (texting) was found to have a greater percentage of high-level users than all other uses (including voice) for more than half of the geoTribes regardless of their stage of life and financial status.

Slender Meanz and Survivors, both tribes with lesser financial means, were the only groups where the percentage of high-level use was greatest for voice calls compared to all other uses of the phone (that were measured).

Crusaders, Grey Power and Twixters all reported the greatest percentage of high-level use of the phone to visit websites, browse or search the Internet. For these tribes fewer members reported high-level use for voice calls and SMS.

The high-level use of the phone for all purposes was less frequently reported by the Survivors, Boomers, Grey Power and to a lesser extent the Slender Meanz compared to most other geoTribes.
SECTION 5: ABOUT THE SPECIFIC SERVICES ACCESSED

This section provides insights about the services accessed by respondents on their mobile phones. This includes details about the following:

- Entertainment services and content accessed on the mobile phone
- Information services accessed on the mobile phone
- Communication services accessed on the mobile phone.

In 2009 (Survey 5) this section was re-designed to capture the changes in the way that consumers were beginning to interact with their mobile phone services. The changed template has been used in subsequent surveys, including the 2014 Survey, with only minor variations.

ENTERTAINMENT SERVICES AND CONTENT ACCESSED

Table 6 shows the frequency of use of a number of listed entertainment services and content accessed on the mobile phone. Figure 36 then illustrates the respondents based on four usage groups, namely:

- High-level frequency (used at least once a day or used at least 5 times a day)
- Medium-level frequency (used at least once a week or used at least once a month)
- Low-level frequency (used at least once every few months, or used at least once a year)
- Not used in the last 12 months.

Table 6: Frequency Of Use Of Entertainment Services And Content In The Last 12 Months

<table>
<thead>
<tr>
<th>Service</th>
<th>At least 5 times a day</th>
<th>At least once a day</th>
<th>At least once a week</th>
<th>At least once a month</th>
<th>At least once every few months</th>
<th>At least once a year</th>
<th>Not at all in the last 12 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Games</td>
<td>8%</td>
<td>19%</td>
<td>16%</td>
<td>12%</td>
<td>8%</td>
<td>6%</td>
<td>32%</td>
</tr>
<tr>
<td>Music Downloads</td>
<td>2%</td>
<td>6%</td>
<td>13%</td>
<td>16%</td>
<td>13%</td>
<td>7%</td>
<td>44%</td>
</tr>
<tr>
<td>Music streaming (e.g., Spotify, MOG)</td>
<td>4%</td>
<td>10%</td>
<td>12%</td>
<td>10%</td>
<td>7%</td>
<td>3%</td>
<td>55%</td>
</tr>
<tr>
<td>FM radio</td>
<td>1%</td>
<td>5%</td>
<td>9%</td>
<td>9%</td>
<td>8%</td>
<td>7%</td>
<td>61%</td>
</tr>
<tr>
<td>Video downloads</td>
<td>2%</td>
<td>7%</td>
<td>13%</td>
<td>11%</td>
<td>7%</td>
<td>5%</td>
<td>55%</td>
</tr>
<tr>
<td>Mobile TV</td>
<td>1%</td>
<td>4%</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
<td>4%</td>
<td>71%</td>
</tr>
</tbody>
</table>


Comments

The results show:

- Games (27%) clearly has the greatest percentage of high-level users, followed by music downloads (14%). Only small percentages of respondents were high-level users of the remaining listed entertainment services and content.
- The percentage of medium-level users is similar across many of the services. Between 22% and 29% of respondents are medium-level users of games (28%), Music Downloads (29%), Video Downloads (24%) and Music Streaming (22%).

Use Of Entertainment Services And Content Compared To Previous Years

Figure 37 shows the overall use of entertainment services and content in the last 12 months compared to the previous 4 Surveys.

The following, however, should be noted.

- In the 2012 (Survey 8) some changes were made to the list of included services and content to reflect changes in the market. For example, FM radio and music streaming were included for the first time.
- From 2013 the decision was made to only focus on these newer types of services and content as opposed to the more traditional entertainment services and content like ringtones and wallpapers. Respondents that are still using these more traditional entertainment services could be captured in the question that asked respondents if they are using other content and services not listed in the Survey.

This means direct comparison with past surveys across all services and content was not possible.
The most notable changes in overall use of entertainment services were the increases in the percentage of respondents who use music downloads and music streaming (e.g., Spotify, MOG). The use of music streaming services was explored further in this year’s survey.

**Music Streaming**

Respondents were asked if they had a paid subscription service. The respondents that had a paid subscription service were asked which streaming service they paid for, while those that were planning to subscribe to a paid services were asked which services they were considering. The results for this set of questions are shown in Figures 38-40.
Just under 10% of respondents have a paid subscription to a music streaming service. Almost 60% of these respondents pay for Spotify, followed in distant second and third by Apple iTunes Radio (17%) and Pandora (15%). These same services are the main ones being considered by those that plan to get a paid subscription to a music streaming service.

Of the 4% of respondents that plan to get a paid music streaming service almost 50% are considering Spotify, followed by Pandora (25%) and Apple iTunes Radio (14%). Almost one quarter of the respondents that are planning to get a paid service have not yet started looking at the market offerings.
INFORMATION SERVICES ACCESSED ON THE MOBILE PHONE

Table 7 shows the frequency of use of a number of listed information services accessed on the mobile phone. Figure 41 then visually illustrates the respondents based on the same four usage groups created to illustrate the use of entertainment content and services, namely:

- High-level frequency (used at least once a day or used at least 5 times a day)
- Medium-level frequency (used at least once a week or used at least once a month)
- Low-level frequency (used at least once every few months, or used at least once a year)
- Not used in the last 12 months.

Table 7: Frequency Of Use Of Information Services In The Last 12 Months

<table>
<thead>
<tr>
<th>Information Services</th>
<th>At least 5 times a day</th>
<th>At least once a day</th>
<th>At least once a week</th>
<th>At least once a month</th>
<th>At least once every few months</th>
<th>At least once a year</th>
<th>Not at all in the last 12 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>News</td>
<td>10%</td>
<td>33%</td>
<td>20%</td>
<td>10%</td>
<td>5%</td>
<td>2%</td>
<td>21%</td>
</tr>
<tr>
<td>Weather</td>
<td>4%</td>
<td>38%</td>
<td>26%</td>
<td>9%</td>
<td>5%</td>
<td>2%</td>
<td>17%</td>
</tr>
<tr>
<td>Sports</td>
<td>3%</td>
<td>12%</td>
<td>17%</td>
<td>11%</td>
<td>7%</td>
<td>4%</td>
<td>47%</td>
</tr>
<tr>
<td>Entertainment or celebrity news</td>
<td>2%</td>
<td>13%</td>
<td>18%</td>
<td>14%</td>
<td>7%</td>
<td>4%</td>
<td>42%</td>
</tr>
<tr>
<td>Maps/location/traffic information</td>
<td>3%</td>
<td>20%</td>
<td>33%</td>
<td>17%</td>
<td>7%</td>
<td>3%</td>
<td>42%</td>
</tr>
<tr>
<td>Movie information</td>
<td>1%</td>
<td>4%</td>
<td>14%</td>
<td>25%</td>
<td>16%</td>
<td>7%</td>
<td>33%</td>
</tr>
<tr>
<td>Event listings</td>
<td>1%</td>
<td>4%</td>
<td>14%</td>
<td>22%</td>
<td>16%</td>
<td>7%</td>
<td>36%</td>
</tr>
<tr>
<td>Restaurant or café information</td>
<td>1%</td>
<td>4%</td>
<td>21%</td>
<td>24%</td>
<td>15%</td>
<td>5%</td>
<td>30%</td>
</tr>
<tr>
<td>TV guides</td>
<td>1%</td>
<td>6%</td>
<td>14%</td>
<td>14%</td>
<td>9%</td>
<td>4%</td>
<td>52%</td>
</tr>
<tr>
<td>Financial Information</td>
<td>2%</td>
<td>8%</td>
<td>15%</td>
<td>12%</td>
<td>9%</td>
<td>5%</td>
<td>49%</td>
</tr>
<tr>
<td>Health and Wellbeing Information</td>
<td>1%</td>
<td>8%</td>
<td>15%</td>
<td>18%</td>
<td>11%</td>
<td>5%</td>
<td>43%</td>
</tr>
</tbody>
</table>

Figure 41: Frequency Of Use Of Information Services In The Last 12 Months
**Comments**

Some key insights from the results are as follows.

- Weather and news were the most “popular” information services accessed in terms of frequency of use. Just over 40% of respondents were high-level users of weather (42%) and news (43%) information on their mobile phones, and approximately 30% were medium-level users.
- ‘Maps/location and traffic information’ was equally popular, but used less frequently. 50% of respondents were medium-level users and 23% were high-level users.
- Between 40% and 50% of respondents were also high or medium-level users of most of the other information services. The only exceptions were restaurant or Financial information (37%) and TV Guides (35%).

**Use of Information Services Compared to Previous Years**

Figure 42 shows the overall use of information services in the last 12 months compared to the previous 3 surveys.

**Figure 42: Overall Use Of Information Services In The Last 12 months Across The Surveys**

![Bar chart showing the percentage of respondents using different information services across surveys from 2011 to 2014.](image)

**Survey 2011** | **Survey 2012** | **Survey 2013** | **Survey 2014**
---|---|---|---
Weather | 55% | 59% | 64% | 67%
Maps/Location/Traffic Info | 55% | 59% | 64% | 67%
News | 55% | 59% | 64% | 67%
Restaurant/Cafe Info | 55% | 59% | 64% | 67%
Movie Info | 55% | 59% | 64% | 67%
Event Listings | 55% | 59% | 64% | 67%
Entertainment/Celebrity News | 55% | 59% | 64% | 67%
Sports | 55% | 59% | 64% | 67%
Financial Info | 55% | 59% | 64% | 67%
TV Guides | 55% | 59% | 64% | 67%

**Comments**

The results for the most popular information services ‘weather’ and ‘maps/location/traffic information’ are consistent with last year. The steady year-on-year increase in the use of most of the remaining listed information services continues in 2014. The only exception was the proportion of respondents that accessed event listings, which decreased slightly from 67% last year to 64% this year. The greatest growth in the last 12 months occurred in the proportion of respondents that accessed entertainment/celebrity news - 58% up from 50% last year.

In 2014 at least half of the respondents used almost every information service in the last 12 months. The only exception was TV Guides’ (48%).
COMMUNICATION SERVICES ACCESSED ON THE MOBILE PHONE

Table 8 shows the frequency of use of a number of listed information and entertainment services and content. Figure 43 shows the respondents based on the same four usage groups created to illustrate the use of information and entertainment services and content, namely:

- High-level frequency (used at least once a day or used at least 5 times a day)
- Medium-level frequency (used at least once a week or used at least once a month)
- Low-level frequency (used at least once every few months, or used at least once a year)
- Not used in the last 12 months.

**Table 8: Frequency Of Use Of Communication Services In The Last 12 Months**

<table>
<thead>
<tr>
<th>Communication Services</th>
<th>At least 5 times a day</th>
<th>At least once a day</th>
<th>At least once a week</th>
<th>At least once a month</th>
<th>At least once every few months</th>
<th>At least once a year</th>
<th>Not at all in the last 12 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social networking sites or applications (e.g. Facebook MySpace Twitter etc.)</td>
<td>33%</td>
<td>24%</td>
<td>10%</td>
<td>4%</td>
<td>2%</td>
<td>2%</td>
<td>26%</td>
</tr>
<tr>
<td>Email</td>
<td>30%</td>
<td>28%</td>
<td>11%</td>
<td>5%</td>
<td>3%</td>
<td>1%</td>
<td>21%</td>
</tr>
<tr>
<td>Instant Messenger (IM)</td>
<td>13%</td>
<td>14%</td>
<td>12%</td>
<td>5%</td>
<td>3%</td>
<td>2%</td>
<td>51%</td>
</tr>
<tr>
<td>MMS (multimedia messaging service)</td>
<td>7%</td>
<td>19%</td>
<td>24%</td>
<td>14%</td>
<td>8%</td>
<td>5%</td>
<td>24%</td>
</tr>
<tr>
<td>Chat rooms</td>
<td>2%</td>
<td>4%</td>
<td>5%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
<td>81%</td>
</tr>
<tr>
<td>Video calling</td>
<td>2%</td>
<td>4%</td>
<td>9%</td>
<td>11%</td>
<td>9%</td>
<td>7%</td>
<td>58%</td>
</tr>
</tbody>
</table>

**Figure 43: Frequency Of Use Of Communication Services In The Last 12 Months**
Comments
Some points to note:

- Email and social networking sites are clearly the most frequently used communication services on the mobile phone.
  - Just over half of the respondents were high-level users of email (58%) and social networking sites and applications (57%).
- MMS had a similar overall proportion of combined high and medium-level users as social networking sites and applications. However, the ratio of high to medium is reversed for MMS with most users being medium-level users.

Use Of Communication Services Compared To Previous Years

Figure 44 shows the overall use of communication services in the last 12 months, compared to the previous 5 Surveys.

Figure 44: Overall Use Of Communication Services In The Last 12 Months Across The Surveys

Comments
The overall trend since the 2010 Survey has been year-on-year growth. However, from 2013 to 2014 growth has slowed. The use of Instant Messenger experienced the greatest growth (6%) from 2013 to 2014. This compares to growth rates of between 8 and 11% from 2012 to 2013 for most of the communication services.

At the end of this section of the Survey respondents were asked if they had visited or used any information, entertainment or communication type services on their mobile phones that had not been included in the previous few questions. Of all the respondents, 4% answered that they had used other services. Some of the more common and relevant responses included YouTube, Instagram, Whatsapp, Podcasts and Viber.
SECTION 6: ABOUT THE APPLICATIONS ACCESSED

In this section of the Survey respondents were asked about the applications they had downloaded and installed on their mobile phones.

Questions about the use of applications were first asked of respondents in the 2010 Survey. The proportion of respondents who have downloaded and installed an application to their mobile phone has stabilised at around 80%, following substantial yearly growth from 2010 to 2013. The growth rates are shown in Figure 45.

Figure 45: Respondents That Have Downloaded And Installed An Application To Their Mobile Phones Across Surveys

Those respondents that said they had downloaded an application were then asked a range of questions relating to their behaviour and experience in downloading and installing applications to their mobile phone. The questions were designed to explore the following:

- Average number of applications used per week
- Type of applications used
- Respondent who have paid for an application
- Typical cost paid for an application.

The findings are now presented.
AVERAGE NUMBER OF APPLICATIONS USED PER WEEK

Since 2012 respondents have been asked to report the average number of applications they used per week. Their responses are captured in Figure 46.

Figure 46: Average Number Of Applications Respondents Used Per Week

![Figure 46: Average Number Of Applications Respondents Used Per Week](image)

Comments

The results are in line with the results from last year with no notable changes.

TYPES OF APPLICATIONS USED

Respondents were asked what type of applications they have used on their mobile phones during the last 6 months. The responses for 2014 compared to the previous 4 years are shown in Table 9.

Table 9: Type Of Applications Used By Respondents On Their Mobile Phone In The Last 6 Months

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Maps &amp; Navigation</td>
<td>73%</td>
<td>55%</td>
<td>74%</td>
<td>80%</td>
<td>82%</td>
</tr>
<tr>
<td>News &amp; Weather</td>
<td>70%</td>
<td>57%</td>
<td>73%</td>
<td>72%</td>
<td>72%</td>
</tr>
<tr>
<td>Games</td>
<td>82%</td>
<td>79%</td>
<td>74%</td>
<td>64%</td>
<td>66%</td>
</tr>
<tr>
<td>Photos, videos &amp; movies</td>
<td>57%</td>
<td>39%</td>
<td>56%</td>
<td>61%</td>
<td>62%</td>
</tr>
<tr>
<td>Instant Messenger &amp; Social Networking</td>
<td>61%</td>
<td>46%</td>
<td>27%</td>
<td>52%</td>
<td>61%</td>
</tr>
<tr>
<td>Music</td>
<td>50%</td>
<td>48%</td>
<td>50%</td>
<td>48%</td>
<td>51%</td>
</tr>
<tr>
<td>Search (e.g. Yellow pages)</td>
<td>54%</td>
<td>26%</td>
<td>53%</td>
<td>45%</td>
<td>43%</td>
</tr>
<tr>
<td>Eating Out</td>
<td>41%</td>
<td>28%</td>
<td>30%</td>
<td>33%</td>
<td>34%</td>
</tr>
<tr>
<td>Shopping</td>
<td>38%</td>
<td>30%</td>
<td>35%</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>Managing Money</td>
<td>31%</td>
<td>17%</td>
<td>29%</td>
<td>32%</td>
<td>33%</td>
</tr>
<tr>
<td>Travel</td>
<td>36%</td>
<td>29%</td>
<td>31%</td>
<td>32%</td>
<td>31%</td>
</tr>
<tr>
<td>Health &amp; Wellbeing</td>
<td>33%</td>
<td>23%</td>
<td>23%</td>
<td>28%</td>
<td>27%</td>
</tr>
<tr>
<td>Books</td>
<td>33%</td>
<td>30%</td>
<td>27%</td>
<td>27%</td>
<td>23%</td>
</tr>
<tr>
<td>Time Management</td>
<td>38%</td>
<td>21%</td>
<td>20%</td>
<td>24%</td>
<td>21%</td>
</tr>
<tr>
<td>Education</td>
<td>33%</td>
<td>21%</td>
<td>18%</td>
<td>17%</td>
<td>15%</td>
</tr>
<tr>
<td>Business</td>
<td>33%</td>
<td>19%</td>
<td>19%</td>
<td>20%</td>
<td>14%</td>
</tr>
</tbody>
</table>
Comments
Similar to the last few years the most popular types of applications used by respondents were ‘Maps and navigation’ (82%), ‘News and weather’ (72%), ‘Games’ (66%), and ‘Photos, Videos and Movies’ (62%).

This year the only application that experienced growth of at least 5% was ‘Instant Messenger and Social Networking’ – 52% to 61%. This is in contrast to growth between 2012 and 2013. The applications that experienced at least 5% growth from 2012 to 2013 included:

- Instant Messenger and Social Networking (27% to 52%)
- Photos, Videos and Movies (56% to 61%)
- Health and Wellbeing (23% to 28%)
- Maps and Navigation (74% to 80%).

PAID APPLICATIONS DOWNLOADED AND INSTALLED

Respondents who had successfully downloaded and installed applications on their mobile phones were asked if ‘in the last 6 months’ they had paid money to download applications on their mobile phone. The results across the Surveys are shown in Figure 47.

![Figure 47: Respondents Who Paid For Applications On Their Mobile Phones (as a percentage of those that successfully downloaded applications)](image)

Comments
Of those respondents that had successfully downloaded an application to their mobile phone, 45% stated they had paid to do so. This figure represents a substantial decline from last year. This is of particular interest since the overall proportion of respondents who successfully downloaded an application to their mobile phone is consistent with last year (around 80%). This decrease in the percentage of respondents paying for applications may reflect the increasing range of applications available at no cost to respondents, perhaps due to an increase in ad funded business models. Alternatively respondents have sourced the paid applications they want and the demand is levelling out.
Respondents who paid to download and install an application were then asked to record the typical cost they paid for applications to the nearest dollar. Figure 48 shows the typical cost paid for an application by 2013 and 2014 respondents.

**Figure 48: Typical Cost Respondents Paid For An Application Across Surveys**

![Typical Cost Respondents Paid For An Application Across Surveys](image)

**Comments**

The results of the 2014 Survey are consistent with the results of the 2013 Survey. The typical cost paid by just over half of the 2013 and 2014 respondents was $2-$3.

However, there were some notable differences, which include:

- The decrease in the percentage of respondents who stated the typical cost paid for an application was $6-$10 (3% down from 8%)
- The increase in the percentage of respondents who stated the typical cost paid for an application was $3 (21% up from 17%).
SECTION 7: SPECIAL TOPIC
USE OF THE MOBILE PHONE COMPARED TO THE TABLET AND PERSONAL COMPUTER (PC)

In this section of the report the findings relate to this year’s special topic questions regarding the use of the mobile phone compared to the tablet and personal computer (i.e., laptop or desktop). These findings include the following:

- PC and Tablet ownership compared to smartphone ownership
- Use of the personal computer and tablet compared to the mobile phone
- Type of purchases made on the tablet and personal computer compared to the mobile phone
- Purchase experience on the tablet and personal computer compared to the mobile phone
- Preferred device for making online purchases
- Preferred types of ads on the tablet and personal computer compared to the mobile phone
- Conversion rate of banner ads on the tablet and personal computer compared to the mobile phone
- Preferred device for a range of online activities.

The results follow.

PC AND TABLET OWNERSHIP COMPARED TO SMARTPHONE OWNERSHIP

Figure 49 shows the ownership of tablets and personal computers compared to the smartphone.

Separate figures 50 and 51 show ownership of the personal computer and tablet and the planned purchase of these devices ‘in the next 12 months’. As was the case with the planned purchase of a smartphone, the planned purchase of a personal computer and tablet may not translate to actual purchase, but it does provide an indication of intent and interest in purchasing these devices.

Tablet ownership has been collected since the 2011 Survey. For this reason the separate graph on tablet ownership includes ownership over the last four years. This is the first time in the Survey that ownership of the personal computer has been collected.
Figure 49: Smartphone Ownership Compared To Ownership of Tablets And Personal Computers

Figure 50: Ownership Of The Personal Computer

Figure 51: Ownership Of The Tablet Across Surveys
Comments
Just under 90% of respondents own both a personal computer (desktop or laptop) and a smartphone. Ownership of the tablet is much lower at around 60%. As seen in Figure 51 growth in ownership of the tablet also appears to have slowed in 2014 compared to previous years. For example, ownership more than doubled from 2011 to 2012, it again increased substantially from 2012 to 2013 (18% increase). However, from 2013 to 2014 ownership remained fairly constant (56% to 58%).

Given the level of PC ownership it is not surprising that so few respondents plan to purchase a personal computer in the next 12 months.

However, despite the much lower level of tablet ownership compared to the PC and smartphone, there has been minimal change in the proportion of respondents who plan to purchase a tablet in the next 12 months. This suggests that tablet ownership may stabilise and at a much lower level than the smartphone and personal computer unless something occurs that stimulates uptake.

Overall, 53% of respondents owned all three devices: a smartphone, a personal computer and a tablet.

THE USE OF THE PERSONAL COMPUTER AND TABLET COMPARED TO THE MOBILE PHONE

Respondents who owned a personal computer (i.e., laptop or desktop) and tablet were asked to rank the top 5 ways they use the personal computer and tablet from a range of listed purposes. To allow for comparisons this was the same list that was used in questions relating to the use of the mobile phone earlier in the Survey.

Figure 52 shows the rank of the top 5 uses of the personal computer
Figure 53 shows the rank of the top 5 uses of the tablet
Figure 54 shows the combined top 2 ranks of the mobile phone, personal computer and tablet.

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* We remind readers that the ownership figures are likely to best reflect mobile phone behaviour and preferences among the 18-75 year olds, and the generalisability of the results may not extend to older or younger Australians.
Figure 52: Rank Of Top 5 Uses Of The Personal Computer

- **Voice Calls**: 8%
- **SMS (Texting)**: 10%
- **To Send and Receive Emails**: 11%
- **To Get Information**: 17%
- **For Entertainment Purposes**: 24%
- **To Get Information About Websites and/or Browse or Search the Internet**: 22%
- **For Banking Including Transfers and Bill Payments**: 18%
- **To Buy Things Online**: 7%
- **To Read or Edit Documents or Files**: 22%

Figure 53: Rank Of Top 5 Uses Of The Tablet

- **Voice Calls**: 8%
- **SMS (Texting)**: 9%
- **To Send and Receive Emails**: 13%
- **To Get Information**: 12%
- **For Entertainment Purposes**: 9%
- **To Get Information About Websites and/or Browse or Search the Internet**: 27%
- **For Banking Including Transfers and Bill Payments**: 14%
- **To Buy Things Online**: 15%
- **To Read or Edit Documents or Files**: 14%
Figure 54: Combined Top Two Ranks of Mobile Phone Use Compared To The Personal Computer And Tablet

Comments
Voice and SMS are critical differentiators when compared to the computer and tablet. They are clearly (and almost uniquely) associated with the mobile phone. Voice and SMS are the foundation services of the mobile phone. 34% of respondents ranked SMS either 1 or 2, and 26% ranked voice calls either 1 or 2. Emailing (12%) was a distant third in terms of combined 1 and 2 rankings. No other services are so clearly associated with a single device.

Unlike the mobile phone, the tablet and PC do not have one or two ‘foundation’ services, but instead they have a cluster of services that are ranked either 1 or 2 by around 15-25% of respondents. For the personal computer these services are:

- To send and receive emails (25%)
- To visit websites and/or browse or search the Internet (20%)
- To get information (18%)
- To read or edit documents or files (15%)

For the tablet these services are:

- To visit websites and/or browse or search the Internet (24%)
- For entertainment purposes (21%)
- To get information (19%)
- To send and receive emails (17%)
PURCHASES MADE ON THE PERSONAL COMPUTER AND TABLET COMPARED TO THE MOBILE PHONE

Respondents who owned a computer and/or PC were asked to record the type of purchases they have made on each device. Figure 55 compares the results for the PC and the tablet to the results for the mobile phone. Figure 56 shows the types of purchases made by respondents on each device.

Figure 55: Respondents Who Made A Purchase On The Mobile Phone Compared To The Personal Computer And Tablet

Figure 56: Types Of Purchases Made On The Mobile Phone Compared To The Personal Computer And Tablet

Comments
More than 90% of PC owners have made a purchase on their computer. This contrasts to almost 75% of tablet owners who made a purchase on their tablets, and almost 60% of mobile phone owners who made a purchase on their mobile phones.

Unsurprisingly, those that purchased on their PC also purchased a wider range of products and services compared to the pattern of purchases made on the tablet and mobile phone. Consistent with the common use of the PC as an online purchase platform, a higher proportion of PC owners also purchased every listed product or service, compared to the tablet owners and mobile phone owners.
PURCHASE EXPERIENCE ON THE TABLET AND PERSONAL COMPUTER COMPARED TO THE MOBILE PHONE

Respondents were asked to describe their overall experience of making purchases on their mobile phone, compared to the personal computer and tablet. Figure 57 shows the results for those respondents that own the given device and have made a purchase on the device.

Figure 57: Overall Purchase Experience On The Mobile Phone Compared To The Personal Computer and Tablet

**Comments**

Dissatisfaction with the purchase experience across all platforms is lower on the personal computer (2%) and tablet (4%), compared to 15% of respondents that stated they were dissatisfied or somewhat dissatisfied with the purchase experience on the mobile phone.

Conversely, satisfaction with the purchase experience on the PC was much higher compared to the tablet and mobile phone experience; just over 60% of respondents stated they were very satisfied with the purchase experience on the computer. This compares to 40% of respondents that stated they were very satisfied with the experience on the tablet, and a quarter of respondents who stated they were very satisfied with their purchase experience on the mobile phone.

A higher percentage of respondents were ambivalent about their purchase experience on the mobile phone and tablet, compared to those commenting on the PC experience. Just under 20% of respondents stated they were neither satisfied nor dissatisfied with the purchase experience on the mobile phone, compared to 11% of those commenting on the tablet experience and 7% commenting on the PC experience.
PREFERRED DEVICE FOR MAKING ONLINE PURCHASES

Respondents were asked to select their most preferred device for making online purchases. Their responses are shown in Figure 58.

Figure 58: Preferred Device For Making Online Purchases

Comments

Given the results of the previous question, it is unsurprising that personal computers are by far the most preferred device for making purchases.

Respondents were asked to explain why they preferred the given device for online purchases. The most frequent responses for each choice follow:

- Respondents that said they preferred the mobile phone claimed it was “easier”, and “convenient.”
- Respondents that said they preferred the personal computer claimed it was “easier to see and read”, had a “bigger/larger screen size” and referred to security related factor claiming it was “safer/secure”.
- Respondents that said they preferred the tablet claimed it had a “bigger/larger screen size” and was “easier.”
PREFERRED TYPES OF ADS ON THE TABLET AND PERSONAL COMPUTER COMPARED TO THE MOBILE PHONE

Respondents were asked to assume that they must receive some advertising to access free content and based on this premise select the type of adverts they would prefer for each of the platforms. The results are shown in Figures 59 and 60. Figure 59 shows the results for the respondents that own each device including those that own the device but do not access any free content (e.g., via apps or websites) on the given device. In the analysis for Figure 60 those respondents that do not access any free content for the given device were removed.

Figure 59: Type Of Adverts Preferred On The Mobile Phone Compared To The Personal Computer And Tablet

Figure 60: Type Of Adverts Preferred On The Mobile Phone Compared To The Personal Computer And Tablet
Comments
The type of adverts preferred is consistent across the three devices. For those respondents that own the given device and access free content:

- Just over a third of respondents stated they do not want to receive personalised ads on the mobile phone, PC or Tablet.
- Around 30% of respondents want ads that are relevant to them on the mobile phone, computer or tablet as long as they can control what information the advertiser has about them.
- Between 17-18% of respondents simply want ads that are relevant to them on the given device.
- Between 16-18% of respondents stated it makes no difference to them if the ads on the device are relevant to them or not.

CONVERSION RATE OF BANNER ADS ON THE TABLET AND PERSONAL COMPUTER COMPARED TO THE MOBILE PHONE

Respondents were asked how often does clicking on product or service based banner advertising they come across on the mobile phone, PC and tablet result in them buying the product or service. Figure 61 shows the overall conversion rate across the three devices. Table 9 provides a detailed breakdown of the conversion rates.

Figure 61: Overall Conversion Rate - How Often Clicking On A Banner Ad Leads To The Purchase Of That Product Or Service
Table 10: Conversion Rate - How Often Clicking On A Banner Ad Leads To The Purchase Of That Product Or Service (As A Percentage Of Those Respondents That Own The Device And Convert At Least Some Of The Time)\textsuperscript{10}

<table>
<thead>
<tr>
<th>Conversion Rate</th>
<th>Mobile Phone (Percentage of Respondents)</th>
<th>Personal Computer (Percentage of Respondents)</th>
<th>Tablet (Percentage of Respondents)</th>
</tr>
</thead>
<tbody>
<tr>
<td>5%</td>
<td>24%</td>
<td>22%</td>
<td>21%</td>
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<tr>
<td>10%</td>
<td>18%</td>
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<td>15%</td>
<td>8%</td>
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<td>20%</td>
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<td>0%</td>
</tr>
<tr>
<td>100%</td>
<td>1%</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Comments

The conversion rate of banner ads is greater on both the PC and tablet compared to the mobile phone. Just over a quarter of respondents said that clicking on a banner ad on their mobile phone resulted in them buying the product or service at least some of the time, compared to 32% conversion rate on the tablet and 40% conversion rate on the PC.

The detailed breakdown of the conversion rates shows that over 50% of respondents indicated that they purchased a product or service following interaction with a banner advertisement on 20% or less occasions. For each device the conversion rate was:

- Mobile phone – 59% of respondents had a conversion rate of 20% or less
- Personal computer – 54% of respondents had a conversion rate of 20% or less
- Tablet – 54% of respondents had a conversion rate of 20% or less

\textsuperscript{10} Conversion rates were captured in increments of 5%. This means that the percentage was calculated as a percentage of those that converted at least 5% of the time. Respondents were advised to leave the slider set to 0% if they did not click on banner ads.
Respondents were asked to identify the device they prefer when engaging with a range of activities online. The results are shown in Figure 62.

**Comments**

The personal computer is clearly the preferred device for almost all the listed online activities. The only exception is using social media, which respondents prefer to do on their mobile phone.

Of particular interest, however, is the tablet versus mobile phone preference across the listed activities. A higher percentage of respondents prefer the mobile phone compared to the tablet for online banking, email and using social media.

The results also show that most respondents had a preference, with only 10% or less of respondents stating they did not have a preferred device for any listed online activity.
SECTION 8: A BROADER LOOK AT MOBILITY

For the first time last year a question was asked that explored the notion of mobility more broadly. This question was again included this year. Respondents were asked if they currently owned or planned to purchase a wearable technology device. Some examples were again provided in the Survey to provide context, such as a Nike Fuel Band, Smart Watch and Google Glasses.

The results of this question are shown in Figure 63.

**Figure 63: Ownership Or Planned Purchase Of A Wearable Technology In The Next 12 Months Across Surveys**

- **Comments**
  There has been a small increase in ownership of wearable technologies since last year, and a small increase in intended purchase in the next 6-12 months. However, the results confirm that wearable technologies are still very much an emerging and unknown reality for most respondents.

How wearable technologies interact and affect the use of mobile phones is likely to be a continuing area of interest for many businesses that use the mobile phone to interact with their customers or clients.
FOR MORE INFORMATION

For more information about:

- The report
- Becoming a sponsor of the 2015 survey
- The option of additional analysis of the AMPLI data to meet your specific needs.

Please contact:

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Email: marisa@completethepicture.com.au

Or the

AIMIA National Office on (02) 9248 7900

AIMIA AMPLI Survey

Official Research Partner:
APPENDIX 1: SOCIO-DEMOGRAPHIC PROFILE OF THE SURVEY RESPONDENTS

This section of the report provides a socio-demographic profile of the Survey respondents, which includes the following:

- Gender
- Age
- Location
- Housing status
- Living arrangements
- Employment status
- Income
- Profile by geoTrib.

Key Findings About The Survey Respondents

The socio-demographic profile of Survey respondents is broadly in line with the profile of adult Australians released by the Australian Bureau of Statistics (ABS) and shows that the results of the 2014 Survey sample can be generalised to Australian mobile phone owners between 18 and 75 years of age.

The results of this section also show that the socio-demographic profile of the respondents across all the surveys is relatively consistent, which allows for meaningful comparisons across the years.

All 15 geoTribes were also represented in the 2014 Survey sample. This is not surprising given the socio-demographic profile of the respondents. It confirms, however, that the behaviours and views of Australians from a wide range of different stages of life and social status have been collected. This is again consistent with previous surveys.¹¹

In line with the overall generalisability of the Survey results to the Australian adult population, the Survey profile by geoTrib is similar to the Australian profile. A notable deviation from the Australian profile is that the Crusaders were considerably over-represented in the Survey. The lower socio-economic profiles, while represented, are typically under-represented compared to the Australian population. This is consistent with the 2011, 2012 and 2013 Survey sample geoTrib profiles and is not surprising given the make up of these particular geoTrib segments. Crusaders are the career-orientated singles and couples who probably spend a lot of time online, and hence may be more likely to complete an online survey. Whereas the priority of the Survivors, for example, is “survival”, that is, these individuals have little income (living off government benefits) that is spent on the basics like food and healthcare rather than spending time online.

¹¹ Profiling by RDA Research geoTribes was first implemented in the 2011 Survey.
To aid readability of this section:

- Comparison between the Survey results and the ABS data is included for only some of the demographic variables
- Comparison across all Surveys is included for only some of the demographic variables, and typically included responses from the last four or five Surveys.
- Commentary is not provided for each figure.

GENDER OF RESPONDENTS

Figure 64 shows a comparison of the gender breakdown of respondents across the Surveys.

Figure 64: Gender Breakdown Across The Surveys
AGE OF RESPONDENTS

Figure 65 shows a comparison of the age distribution of 2014 respondents compared to the population data from the Australian Bureau of Statistics (ABS). Figure 66 shows the age profile of respondents across the last 5 surveys.

**Figure 65: Age of 2014 Survey Respondents Compared To The ABS Age Profile Of Australians**

**Figure 66: Age of Respondents Across The Last Five Surveys**
LOCATION OF RESPONDENTS

Figure 67 shows the residing state of the respondents compared to the population data from the Australian Bureau of Statistics (ABS). Figure 68 presents the location profile of respondents across all of the Surveys.12

Figure 67: Residing State Of The 2014 Survey Respondents Compared To The ABS Age Profile Of Adult Australians

Figure 68: Residing State Of Respondents Across The Surveys

12 The residing state of respondents was not collected for Survey 1 (2005).
HOUSING STATUS OF RESPONDENTS

In the last four Surveys the housing status of respondents has been recorded. This has allowed better matching of the respondents to the socio-demographic and lifestyle geoTribes, which were introduced in the 2011 report. Figure 69 shows the housing status of respondents across the Surveys.

Figure 69: Housing Status Of Respondents Across The Surveys

LIVING ARRANGEMENTS OF RESPONDENTS

Figure 70 shows the living arrangements of the respondents across Surveys.13

Figure 70: Living Arrangements Of Respondents Across The Surveys

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13 Living status of respondents was not collected in the 2013 Survey.
EMPLOYMENT OF RESPONDENTS

The employment status of respondents is shown in Figure 71. This data was also collected for the first time in 2009 (Survey 5) to provide additional insights about the Survey respondents.

Figure 71: Employment Status Of Respondents Across The Last Four Surveys
INCOME OF RESPONDENTS

Figure 72 shows the breakdown of annual household income of respondents of the last 4 Surveys. Prior to Survey 5, individual income as opposed to household income was collected. The change to household income in 2009 (Survey 5) allowed alignment with data collected through the Australian Bureau of Statistics and is considered a more accurate indicator of social economic status, which may be of interest to some readers.\(^{14}\)

Figure 72: Annual Household Income Of Respondents Across The Last 4 Surveys

\(^{14}\) The weekly individual income of the respondents collected in earlier surveys clearly shows that the surveys had captured respondents who earned across a range of income categories.
Table 11 shows the profile of the Survey 2014 respondents by geoTribe compared to the Profile of the Australian Population.

<table>
<thead>
<tr>
<th>geoTribe</th>
<th>Descriptor</th>
<th>% Profile Survey</th>
<th>% Profile Australian geoTribe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achievers</td>
<td>Ambitious younger &amp; middle aged families</td>
<td>11%</td>
<td>8%</td>
</tr>
<tr>
<td>Boomers</td>
<td>White collar post family pre-retirees</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Crusaders</td>
<td>Career-orientated singles &amp; couples</td>
<td>14%</td>
<td>6%</td>
</tr>
<tr>
<td>Debitars</td>
<td>Financially extended younger families</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Fortunats</td>
<td>Financially secure retirees &amp; pre-retirees</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Grey Power</td>
<td>Better off retirees</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Independents</td>
<td>Young singles &amp; couples</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Preppies</td>
<td>Mature children of affluent parents</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Rockafellas</td>
<td>Affluent mature families</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>Sleander Meanz*</td>
<td>People living in under- privileged circumstances</td>
<td>2%</td>
<td>6%</td>
</tr>
<tr>
<td>Struggleville</td>
<td>Struggling young &amp; middle aged families</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Suburban Splendour</td>
<td>Middle class mature families</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>Survivors*</td>
<td>Retirees living on minimal incomes</td>
<td>3%</td>
<td>8%</td>
</tr>
<tr>
<td>True Blues</td>
<td>Blue collar mature families &amp; pre-retirees singles or</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Twisters</td>
<td>Mature children living at home</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>100%</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

* means the overall tribe group has less than 50 members.