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Market reports

AUSTRALIAN BUSINESS MOBILE USAGE AND DIRECTIONS, 2008 END-USER SURVEY

June 2008

With mobile penetration projected to reach 108% of the population, mobile technologies have truly become an integral part of Australian business. HSPA networks, which have constantly been unveiled over the past 18 months, and a slew of next-generation smart phones to be introduced this year, have prompted Australian enterprise mobility activities to new highs.

Produced as the flagship report in Telsyte's Business Decision Maker Series, this study provides a detailed investigation and comprehensive analysis of mobile and wireless technology usage trends among Australian businesses. Key findings from this study include:

- The Australian business mobile market is poised to generate $5.9 billion of service revenue this year, constituting 52% of total market spend. Approximately one in five mobile phone users are classified as business users, with an average monthly ARPU of $108.
- With one in three of the workforce considered mobile, Telsyte estimates that about half of Australian employees are now equipped with business mobile devices – either a regular mobile phone, a smart phone and/or a mobile broadband modem.
- Telstra dominates Australia's business mobile market in all three form factor segments. However, 3 Mobile has performed extremely well with high ARPU and the lowest churn intention rates. 3 Mobile also enjoys stellar results in the fast-growing mobile broadband segment.
- Mobile voice usage as a proportion of total spend has declined considerably year-on-year. Just over 60% of the average regular mobile phone bill is now spent on voice communications, and much less in the case of smart phones. Almost one-half of all business mobile calls are made indoors.
- 3G handset penetration among Australian companies now stands at 55%, and that figure is expected to reach as high as two-thirds in the next 12 months. Convergence technologies, including multi-mode handsets, mobile PBX and mobile VoIP, are registering fast adoption rates.
- For the first time, price is no longer the most important carrier selection criteria. Business mobile users now place the highest value on network coverage. Mobile data speeds are also highly critical to smart phone and mobile broadband users.
- With carriers clearly focusing on the high-end enterprise market and the low-end SME market, the mid-market segment appears to be "neglected" showing a relatively high carrier churn intentions in the next 12 months.

- The business mobile handset market is dominated by a handful of suppliers. Nokia leads the “group of five” that dominates the regular mobile phone segment while BlackBerry leads the “group of five” in the smart phone segment, albeit by a narrow margin.

- Australian businesses tend to select suitable carriers and service plans before choosing appropriate handsets, and yet they are more loyal to their handset brands than they are to their carriers of choice.

- Two-thirds of corporate Australia now considers a supplier’s “greenness” important or becoming important and yet most of them cannot name a carrier or handset vendor who they would perceive as "being green," leaving the "green" mobile mind share battle unconquered. Government agencies and education institutions lead in “green telecom” awareness.

- The demarcation between personal and business use on business mobile phones is fast disappearing, as high usage of consumer-based applications – including presence, instant messaging and social networking – is detected among business users.

- Wireless email remains the most popular business application being mobilised by corporate Australia. Its penetration has now reached over 40% of businesses, a very healthy 10% point growth from last year.

- Emerging fast behind wireless email are line-of-business (LOB) applications, led by customer relationship management (CRM) – currently used by nearly one in five organisations, also a 10% point growth from last year.

- There is a three-horse race between BlackBerry, Symbian and Microsoft in the business mobile device operating system (OS) space. Nonetheless, most Australian firms remain without an OS standardisation plan even though mobility is becoming an entrenched part of business operations.

- While increased productivity and cost reduction remain the overall drivers of enterprise mobility activities, customer service has emerged as the second most important driver this year, supporting the rise of mobile LOB applications.

- Integration with back-end IT systems has replaced cost and ROI as the number-one challenge facing Australian firms, which also require a better understanding on mobile technology as they go mobile.

- A summary of major announcements and developments impacting the Australian mobile market in the past 15 months; and

- Conclusion and recommendations.

Published simultaneously with this study are two other Market Analysis and Forecast Series reports, namely:

- *Australian Business Fixed Line Usage and Directions, 2008 End User Survey* (Publication Number: 80486); and

- *Australian Enterprise Communications Usage and Directions, 2008 End User Survey* (Publication Number: 80488).

Australian Business Mobile Usage and Directions, 2008 End User Survey is a 44-page report costing $2,995 (excluding GST) and includes 38 Figures and 5 Tables.

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