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AUSTRALIAN BUSINESS MOBILE USAGE AND DIRECTIONS, 2009 END-USER SURVEY

August 2009

Australia's mobile market remains a vibrant and growing market in the face of the economic slowdown. In the business market, enterprise mobility activity has reached new peaks with record levels of 3G phone, smartphone and mobile data usage. In difficult times, Australian companies are forced to "do more with less" and mobile technologies have become a key vehicle to achieve that goal.

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:

- Australian businesses have voted cost cutting, productivity and collaboration as their top business priorities this year, with investments in UC and mobility topping the list.
- The Australian business market is projected to generate \$6.5 billion in service revenue this year, with one in five mobile phone users classified as business users.
- BlackBerry remains the leader in the smartphone segment. In fact, its lead has widened over Nokia in the past year. With the rise of Apple and Google in the smartphone OS market, Microsoft's popularity has shrunk markedly as a platform to standardise on.
- Mobile broadband, the fastest-growing segment of the mobile industry, is used by 15% of the workforce. Its ARPU has declined significantly year-on-year to \$90 while the average USB dongle cost stands at around \$150.
- Mobile email remains the most popular business application mobilised by corporate Australia. Its penetration has now gone past the half-way mark to reach 53% of companies, a healthy growth of almost 10% points from last year.
- Notable growth is detected in the use of instant messaging/presence, location services and social networking, which Australian businesses are starting to use to allow customers to be kept up-to-date on their products and services.
- A slow economy has forced Australian firms to focus on internal cost cutting and efficiency improvement priorities. As a result, while mobile Line of Business (LOB) applications led by CRM continue to drive the next wave of enterprise mobility activities, their growth has been subdued in the past 12 months.
- While increased efficiency and cost reductions remain the overall drivers of enterprise mobility activities, customer service has come in as the second-most important driver.
- After cost consideration, integration with existing IT systems is the most significant challenge, in support of the emphasis organisations place on mobilising UC and LOB applications.

- Telsyte recommends suppliers assist business end-users with their cost and benefit justification, provide mobile solutions as part of UC, and harness the power of consumer applications.

Australian Mobile Usage and Directions, 2009 End-User Survey is a 40-page report costing \$3,995 (excluding GST) and includes 33 Figures and 4 Tables.

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