

Global mobile phone survey shows the mobile is a 'remote control' for life

4 September 2009

- **Three quarters of all respondents never leave home without their phone**
- **One in four would find it harder to replace a mobile phone than a wallet or purse**
- **17% of Brits and 15% of Americans now social network via mobile**
- **One in five across 11 markets set up a first date via text**
- **15% flirt with someone other than partner by text**

KUALA LUMPUR — Global market research firm Synovate today released data from its new global mobile phones survey, revealing three quarters of mobile phone owners across 11 markets never leave home without their phone, over a third 'cannot live without it' and 67% regularly use the alarm clock feature.

Synovate's global head of media, Steve Garton, said these small-but-powerful devices are so ubiquitous that by last year, more human beings owned one than did not¹.

"This sheer volume, coupled with enormous marketing potential that is just starting to be realised, means that marketers need to understand as much as possible about how people use their phones, how they feel about them - and what they want more of.

"One very important point about the marketing potential of the phone is that people tend to classify the mobile phone differently to mainstream media like television, radio, print, outdoor and even the internet. Most people do not think of phones as a media platform at all."

Synovate surveyed over 8,000 mobile phone owners across 11 markets to find out more.

Me, myself and my mobile

The Synovate survey showed how much people depend on their phones. Three quarters of the 8,000 plus respondents never leave home without their phones (led by 92% of Russians and 89% of Singaporeans) and more than a third (36%) go as far as to say they cannot live without their mobile (topped by 60% of Taiwanese and 49% of Singaporean respondents).

Jenny Chang, Synovate's managing director in Taiwan said that there, the mobile is part remote control, part security blanket.

"Mobiles give us safety, security and instant access to information. They are the number one tool of communication for us, sometimes even surpassing face-to-face communication. They are our connections to our lives."

The survey also asked people 'If lost, which would be harder to replace... your mobile phone or wallet / purse?' and found a quarter (25%) of all respondents nominated their mobile.

Garton said, "The mobile has yet to take over the wallet or purse as the absolute epicentre of people's lives but it is certainly on the way.

"This is happening now, for example, in the Philippines and Africa where millions of dollars have been transacted via mobile. The telco has effectively become a bank, allowing even those in rural areas to send and receive mobile money. This is just one of the huge benefits which are changing lives in developing nations."

Russians were most likely to nominate the mobile phone as the biggest replacement challenge - one in two would find it extremely difficult to replace. (39% of Russian respondents said their wallet or purse and 11% were undecided.)

Synovate's director of marketing communications for Russia, Maria Vakatova, put this down to the sociability of Russians and the inconvenience of losing a phone.

"Typically Russians buy a more expensive phone than they can afford - it's a status thing. They are also emotionally attached to their phones - there are irreplaceable pictures, videos and so on that people probably don't have copies of on computers. This loss would be devastating."

The Philippines was the closest market to being split on the issue, with 47% saying their mobile phone would be harder to replace and 52% choosing the wallet / purse.

Carole Sarthou, Synovate's managing director for the Philippines, said Filipinos would find the mobile difficult, or even impossible, to replace.

"The connection to other people stops when the phone is lost. It's a storehouse for photos and videos, but most vital are contact details. Filipinos seek constant connection."

'Alarming' stats on what people do

In an increasingly mobile-literate world, only 37% of respondents agreed they did not know how to use most of the features on their phones - meaning over six in ten are comfortable with multi-function mobiles. So what are people actually using them for?

Putting aside the almost ubiquitous calling and SMS functions, the three features most used on a regular basis across all 11 markets were:

1. Alarm clock - 67% use this on a regular basis
2. Camera - 62%
3. Games - 33%

"As the mobile becomes more of an all-in-one device, many other businesses are facing challenging times. However, the opportunities for mobile manufacturers and networks are enormous," said Garton.

Filipinos lead the way in the use of many mobile features. Eighty-seven percent use the alarm clock, 63% play games regularly, 48% listen to or download music, 44% watch video clips and 13% even watch TV (versus an overall 5%).

Sarthou explained this is part cultural and part circumstantial. "It's part of the national psyche to love social connections, music and entertainment. How the Filipino love affair with the mobile is different compared to developing nations is that, in many cases, a mobile is all people have.

"It's the only way they can listen to music, the only way they can play games and the only way they can communicate from afar. Many Filipinos use this instead of the internet and computers and it's not surprising that it has become such a multi-purpose, multi-tasking tool."

The survey showed that developed countries lead the way in mobile functions that require 3G access:

- Overall, 17% of respondents use email on their mobile on a regular basis, led by 26% in the US and 25% in the UK.
- Similarly, an overall 17% use internet browsing, topped by the UK at 31% and the US at 26%.
- Eleven percent say they social network regularly via mobile, again led by the UK (17%) and the US (15%).

Director of technology communications for Synovate in the UK, Philip Shaw, reminded us, "The survey was online in these countries so we are talking to a generally tech-savvy bunch of respondents.

"As smartphones become more and more prevalent, these figures will shoot up further. The full potential of mobile internet is only beginning to be realised. The mobile internet is removing the boundaries between our off and online worlds."

Cameras are clearly very important to mobile phone owners as well. An overall 62% use the camera regularly, led by 76% in the UK and 71% in France.

Shaw said this is partly because most models in these markets have decent cameras.

"Cameras are a little 'build it and they will come'. Once you own a phone with an acceptable quality camera, you tend to use it."

... and what they want to do

So which features do people want more of? What do they most want to see on mobiles of the future? Synovate asked, and more people said they don't know what they want on new mobile phones than any other answer.

The top three choices were:

- Don't know - 22%
- Better quality cameras - 21%, showing just how important the pictures-on-the-go capability will remain in the future (31% of Americans, 29% of Canadians and 28% of French nominated this)

- More memory / storage space - 17%, which makes a lot of sense as people do more and store more on their devices

Phone flirt 'n' dirt

Text messaging has undoubtedly changed the way people manage their relationships. This survey showed that 31% of people across 11 markets have lied about their whereabouts via text, one in five has set up a first date and 12% have broken up with someone.

'Hiding' behind your phone allows different cultures to be bolder, or more timid, than they may have otherwise been. The survey showed how text is used for 'good' or fun reasons:

- One third of all respondents had flirted with their partners by text, led by 47% of Brits and 40% of Russians.
- 15% have flirted with someone other than their partners, again led by the Brits (26%) and Russians (24%). Least likely to have done this were the Dutch, with 88% saying they had not.
- 20%, or one in five respondents across 11 markets, have set up a first date via text. Malaysians were most likely to date this way at 36%, followed by the Russians at 35%.

Shaw agreed that the Brits are quite a flirty bunch. "I suspect this has a certain amount to do with pub culture, plus our national stereotype is embarrassment at expressing emotion. Text allows people to be bolder and takes away a lot of the risk that may come with flirting."

The survey also showed how text is used for potentially bad news:

- 12% have broken up with someone via text, led by 23% of Filipinos and 22% of both Malaysians and Russians.
- Overall, 8% of respondents have been dumped via text, led by 20% of Malaysians and 17% of Filipinos.
- 35% agreed that they have hidden behind text to say no or send a difficult message, led by 49% of Filipinos, 48% of Malaysians and 47% of Singaporeans. Least likely to hide behind SMS are Canadians (79% disagree) and Americans (71%).
- 31% agreed they have lied about why they were running late or where they are, led by 57% of Filipinos and 44% of Singaporeans. Least likely to lie via text (or so they say) are the Dutch (84% disagree) and the Americans (79%).

Synovate's managing director for Malaysia, Steve Murphy, commented on the more than one in five Malaysians who have broken up with someone, or been broken up with, via text messaging.

"Confrontation is certainly something that most Malaysians try to avoid. It is not typically Malaysian to confront or be upfront about issues, especially personal ones. Communicating via SMS is also part of everyday life and - let's face it - it is just plain easier to break-up with someone via text message than having to tell them face-to-face."

¹Statistic quoted in 'The Tipping Point: one in two humans now carries a mobile phone' by Mike Hanlon on <http://www.gizmag.com/mobile-phone-penetration/8831/>.

Curiosities

- Risking interrupted sleep, an overall 42% go to bed with their phones nearby. This was topped by 70% of Filipinos and 62% of Malaysians. Least likely to do this were Russian mobile phone owners.
- 77% of French respondents do not feel excited when their phone rings or beeps for a message. By contrast, 54% of Filipinos and half of all Malaysian mobile owners still get that frisson of pleasure that means someone needs them.
- An overall 37% don't know how to use most of the functions on their phones, led by 46% of Taiwanese and 44% of Danes.
- More than a third (36%) of respondents across 11 markets would like to turn their phones off more often, but are worried they will miss something.

About the Synovate mobile phones survey

The In:fact survey on mobile phones was conducted in June 2009 across 11 markets and over 8,000 urban mobile phone owners. The markets covered are Canada, Denmark, France, Malaysia, the Netherlands, the Philippines, Russia, Singapore, Taiwan, the United Kingdom (UK) and the United States of America (US).

The survey was conducted online in several markets, meaning the respondents are likely to be more tech-savvy than the general population.