

The Mobility 2014 research study released

The Mobility 2014 research study, conducted by World Wide Worx with the backing of FNB, reveals that the 19+ age group - representing students and entrants into the workforce - is abandoning voice faster than any other segment.

Only 56% of this group's mobile budget is now spent on voice, down from 66% in mid-2012. Data spend, on the other hand, has increased from 17% to 24%.



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The trend for the overall market also shows a dramatic shift: voice spend has dropped from 73% of mobile budget to 65%, while data has increased from 12% to 16%. At the beginning of 2010, voice stood at 77% and data at 8%.

SMS spend remains steady at 13%, while full music tracks, which featured for the first time in 2012, have doubled from 1% to 2% of the average mobile budget.

Powerful shift to data

"Older users continue to spend far more overall, but the powerful shift in spend from voice to data will work its way up the age segments in the coming years," says Arthur Goldstuck, MD of World Wide Worx. "Already, we are seeing a flattening out of the curve of data use from the 25-34 through to the 46-55 age groups. Only above that age does data spend drop off - but not very significantly."

The survey, conducted among adult cellphone users living in cities and towns in South Africa, reveals that Nokia remains the most popular brand in the country, but its market share has dropped significantly, from 50% to 44%. Blackberry has increased its market share locally, despite almost vanishing as a force in Western markets, from 18% to 23%, thanks to its continued aspirational appeal in younger markets.

Samsung has increased share marginally, from 18% to 19%. In mid-2012, consumers had indicated they would move away from the brand, with a third of its users saying they would opt for other phones. However, the appeal of its Galaxy range of Android devices across all smartphone price segments has resulted in resurgence.

Banking apps up

The survey reveals substantial shifts in the mobile banking environment, with the biggest proportional shift coming in the use of banking apps. From only 1% of all banking customers using banking apps in mid-2012, the figure has shot up to 9% in late 2013. Cellphone banking has also surged, from 28% in mid-2012 to 37% in late 2013.

"One in ten banking customers are now using apps and that number is still rising fast, which vindicates our strategy of expanding our offerings as the market's use of these tools evolves," says Dione Sankar, head of cellphone banking and messaging at FNB. "At the same time, looking after the non-smartphone customer through basic cellphone banking has also paid off. We have never experienced such dramatic growth across all mobile channels."

The most popular feature used on phones remains the camera, at 73% of cellphone users, with FM Radio far behind at 51% and the music player on the phone catching up to FM, at 49%.

First measurement of tablet

Tablet usage was measured for the first time in the Mobility project, revealing that approximately 5% of adult cellphone users also have a tablet. The majority use it for Internet access (77%) and e-mail (57%), with social media and downloading apps in joint third place (43%).

Samsung dominates tablet usage by adults, with 52% market share, while Apple iPads hold 23% of the adult market. Both tablet penetration and market share is set to shift in the coming year: a quarter of respondents said they expected to buy a tablet, with 44% of these saying they will buy a Samsung device and 32% opting for Apple.

The Mobility 2014 project comprises two reports, namely The Mobile Consumer in SA 2014, comprising cellphone usage and mobile banking trends, and The Mobile Internet in SA 2014, exploring online trends. It is based on face-to-face interviews with a nationally representative sample of South African adult cellphone users living in cities and towns. Dashboard Market Intelligence conducted fieldwork in late 2013.

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