

## Research Highlights

The research findings and analysis in *Taking Ontario Mobile* provide a snapshot of current attitudes toward mobility on the part of Ontario residents, as well as implementation plans on the part of industry and non-profit sectors.

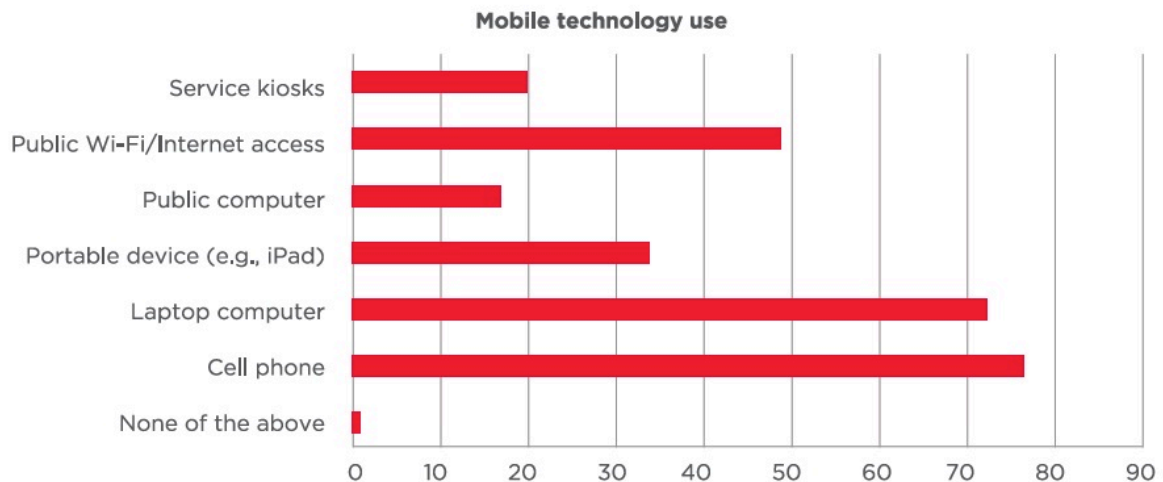
## Resident and Industry Surveys

### Definition of Mobility

The definition of mobility in *Taking Ontario Mobile* proposes a network in which individuals have connectivity throughout their activities that is mediated, enhanced or driven by technology. This definition focuses on enabling the mobility of the individual. As the ubiquity and affordances of kiosks, Wi-Fi and the mobile Internet expand, mobile technologies are increasingly integrated into multiple daily activities.

### Mobile Technology Uses

Given this definition, Ontario residents use a range of technological platforms:



Survey respondents reflected the growing interest and use of mobile technology that was identified in expert interviews and in the review of other jurisdictions:

- 99 per cent of respondents reported using some form of mobile technology, and,
- 77 per cent owned a cell phone.

### Demand for Mobile Services

The integration of mobility into everyday life is fuelling demand for increased mobile services. Also driving this demand is individuals' intimate, personalized relationships with their mobile devices.

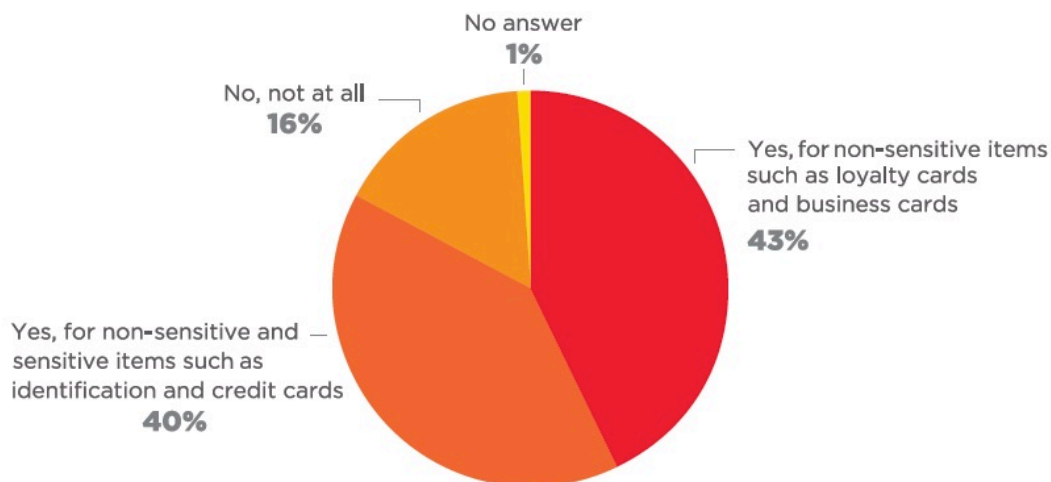
- 78 per cent showed a strong interest in accessing more services through mobile technologies, and,
- 74 per cent showed a strong interest in learning how mobile technologies can augment or replace common tasks.

The responses suggest that government would benefit from prioritizing the consolidation of its services into a mobile platform. It also suggests that Ontario consumers may gravitate to other jurisdictions if they cannot access excellent mobile commerce opportunities at home.

### M-Wallet

Perhaps surprisingly, many surveyed expressed confidence in using a mobile device for sensitive documents like identification and financial transactions: there was a strong trend in readiness for a mobile wallet, even though the concept would have been unseen and likely completely novel to respondents at the time of the surveys:

- 83 per cent of respondents were interested in using mobile devices to carry non-sensitive information like loyalty cards, and,
- 40 per cent wanted to have sensitive information such as identification and credit cards on a mobile device (m-wallet).



## **Access and Competition**

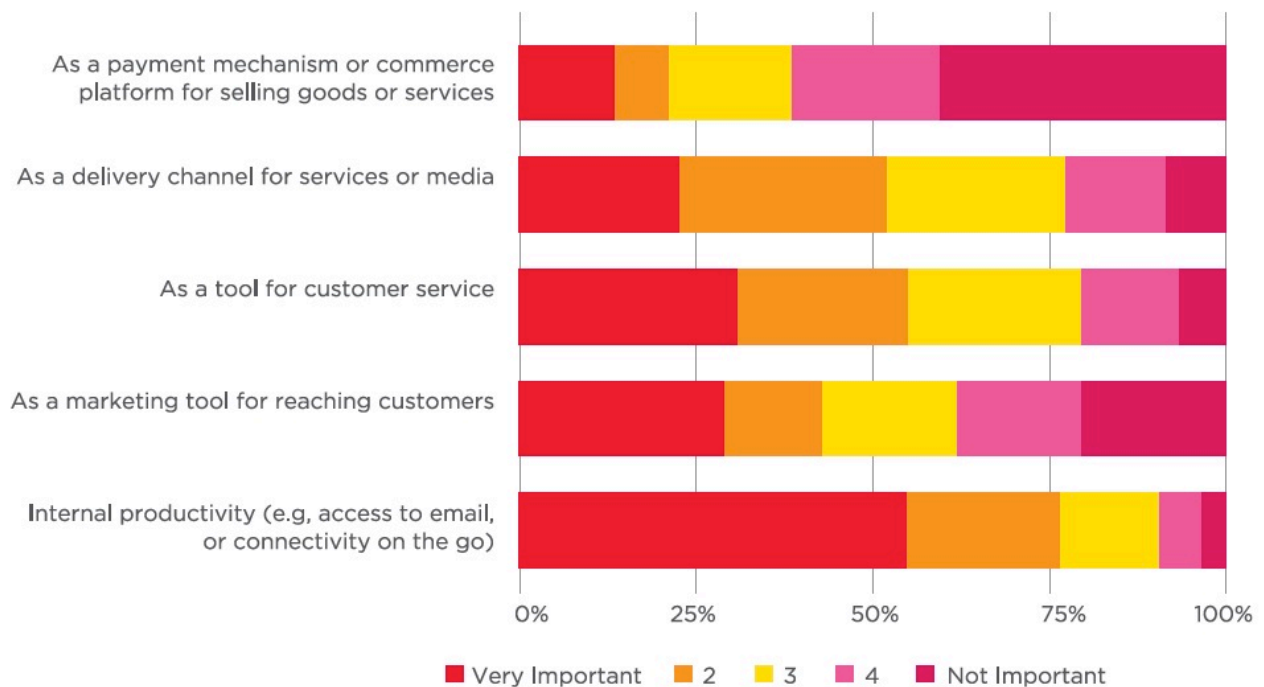
High cost as a barrier to access and perceived lack of competition between carriers were common themes in researchers' discussions and interviews with experts. Survey respondents felt similarly:

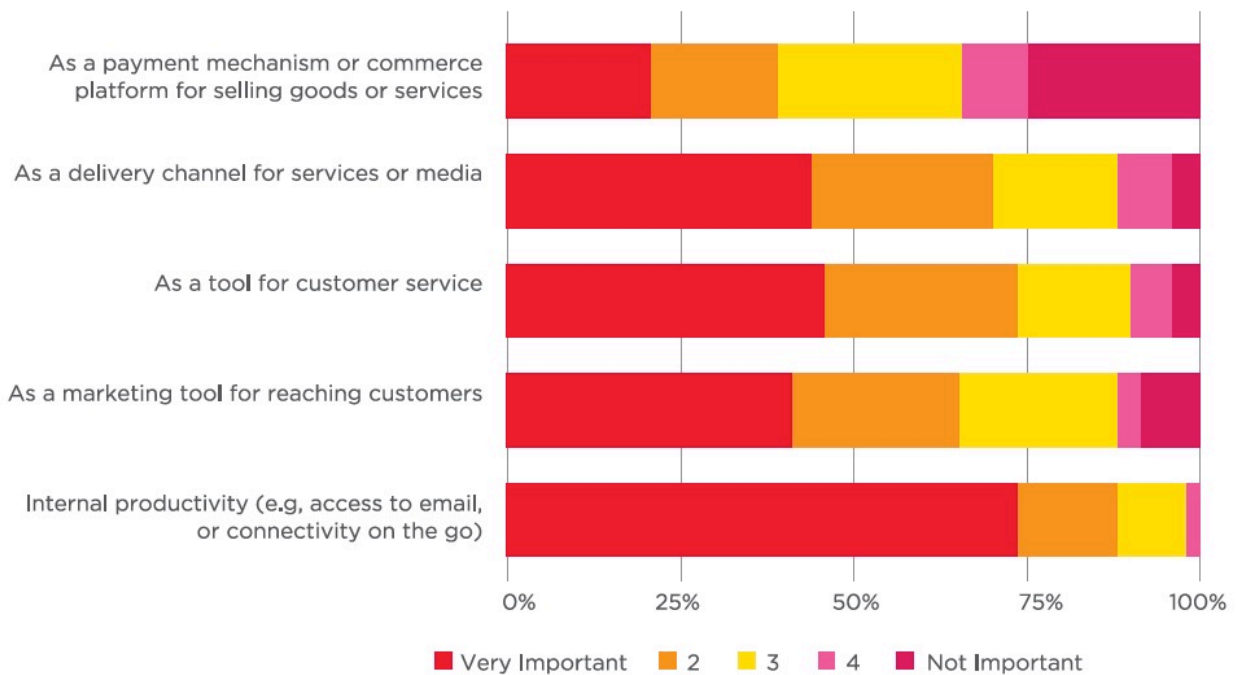
- 83 per cent indicate that they feel overcharged for their service-delivery option.

## Industry Survey

Industries currently use mobility for customer-service applications, media delivery, marketing and internal productivity as noted below:

- Internal productivity is the priority of large companies, while small to medium enterprises (SMEs) are more interested in the innovation that mobility can bring to their products. Industries saw the advent of mobile technologies and believed that their trade associations were aware of the importance of the “mobile turn.”
- The vast majority believed that consumers wanted more mobile services, and that providers knew they needed to provide these services to remain current.
- More detailed questions in the survey found that mobility is used for these tasks: advertising, archiving, payment, desktop replacement, on-the-go document preparation, GPS mapping and directions, technical documentation, location-based information, 24/7 customer relationship management (CRM), product development, market research, product marketing, social networking, marketing, and voice and email content.
- The most common use of mobile technology reported by our respondents was voice and email contact with employees (75 per cent), followed by social networking (41 per cent)
- Less significant uses such as “on the go document preparation” and “payment mechanism” indicates trends for the future, as mobile becomes ubiquitous.





The results (figures 38 and 39) strongly indicate that mobile technologies are increasingly seen as important across multiple business functions as indicated by the following data:

- Currently, only about 50 per cent of respondents think that mobile technologies are important as vehicles for delivery, customer service and marketing.
- This number jumps to about 75 per cent when respondents are asked to anticipate the importance of mobile technologies to these three areas within the next five years.

Businesses perceive mobile technologies as an important aid to productivity: 76 per cent felt that those mobile technologies were important to productivity today, and that number increases to 88 per cent when estimating the importance of mobile technologies to productivity in five years from now.

### **Survey and Interview Data**

As a fundamental cornerstone of *Taking Ontario Mobile*, the following research was undertaken to assist in developing an understanding of what Ontario residents want from mobility:

- An online survey of Ontario residents, conducted in order to gauge interest in and ability to access mobile technologies and services.
- An online survey of industrial and non-profit sectors, conducted in order to understand how mobile technology is being used by the labour force in a variety of industries.
- A survey of Ontario industries in order to understand their current and planned use of mobile technologies.
- Surveys of the mobile industry undertaken by the Mobile Experience Innovation Centre (MEIC) as part of its report *Research into the Ontario/GTA Mobile Content, Services and Applications Industry (2012)*, a report for the Ontario Media Development Corporation (OMDC) undertaken in order to determine the needs of Ontario's mobile industries. This report is available with *Taking Ontario Mobile*.
- Interviews with leaders in the mobile sector, with potential users of mobility and with key policymakers.
- Interviews undertaken by Copernicus Research in order to determine the mobile needs and strategies of Aboriginal and rural Ontarians.