

Mobile and Social Media Landscape in Macau – 2013 Report

December 2013



Study Objectives and Design



- Understand Macau residents' ownership and usage of mobile devices
- Explore their usage behavior related to online activities, particularly social media
- Identify popular social media sites for leisure
- Gauge the adoption of mobile services (e.g. mobile payment) and identify key barriers

Study Objectives



- Face-to-face street intercept in Macau

Methodology



- Local Macau residents aged 15 to 54

Targets



- 385 interviews
- 5 to 10 mins in length

Interviews



- March to May 2013

Fieldwork Period





Macau Residential Households are Technology Savvy



Recent History of Technology Products Ownership

In 2010...

- **88.4%** of Macau residents own mobile phone (Smartphone and feature phone)
- **87.1%** of Macau residents own PC





The first mass market tablet was
launched in Jan 2010
and now.....

Source: Macau Association for Internet Research (2011)



Smartphone is now well penetrated among Macau residents, while Tablet ownership already reached half of households.



86% own PC 
92% own Smartphone 

55% own Tablet 

79% own Laptop 

44% own video game console 

Base: 385
All respondents
Q2: Which of the following products do you or your family currently own?



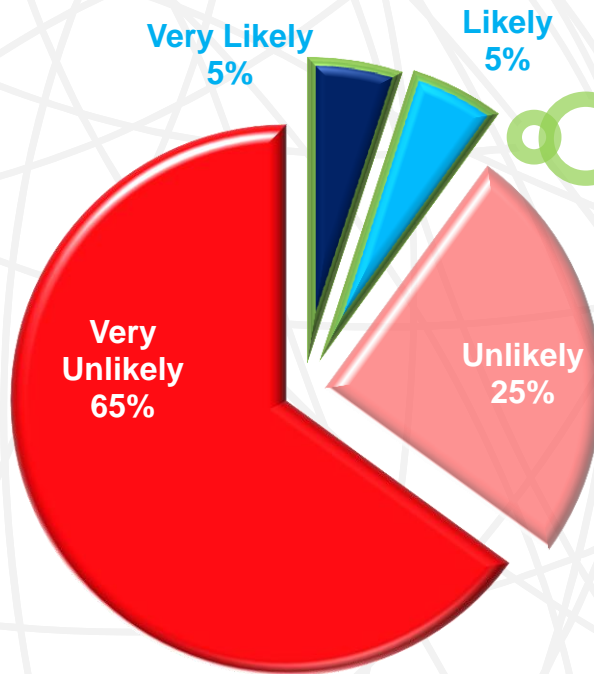
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Despite the popularity of smartphone, intention to purchase a new one in near future is low, possibly due to the lack of new innovations in the market.



Likelihood to Purchase Smartphone in Coming 12 months



Average amount planned to spend: **MOP\$5000**

Brands most likely purchase



Base: 382
All respondents excluding no answer
Q2B. How likely will you purchase a smartphone in the coming 12 months?

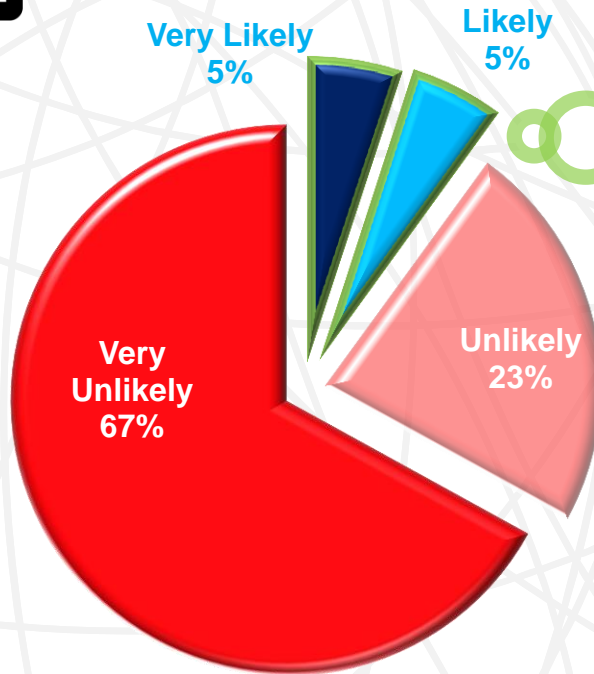
Base: 38
Those who are likely or very likely to purchase smartphone in the coming 12 months
Q2C. How much do you plan to spend on the purchase?
Q2D. Which brand would you most likely purchase?



Similarly, few are interested to purchase a new Tablet in the next 12 months. Apple is still by far the most popular tablet brand in the market.

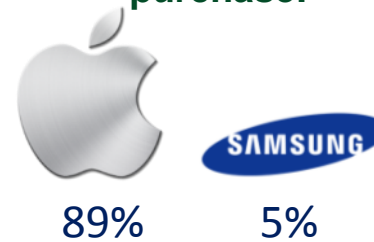


Likelihood to Purchase Tablet in Coming 12 months



Average amount planned to spend: **MOP\$3700**

Brands most likely purchase:



Base: 382
All respondents excluding no answer
Q2B. How likely will you purchase a tablet in the coming 12 months?

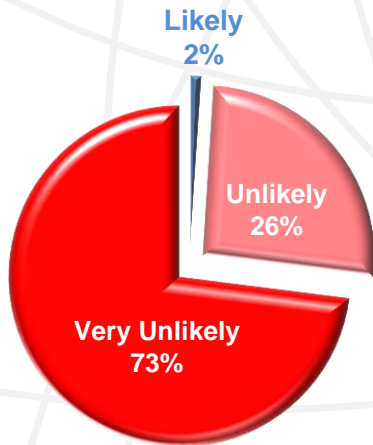
Base: 39
Those who are likely or very likely to purchase tablet in the coming 12 months
Q2C. How much do you plan to spend on the purchase?
Q2D. Which brand would you most likely purchase?



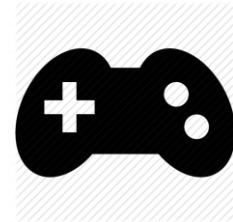
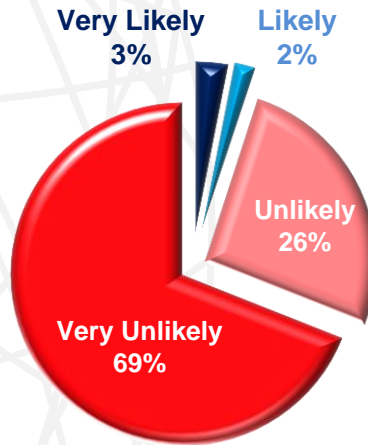
Due to the longer product lifecycle, some other technology products such as PC has an even lower purchase intention of just 2%.



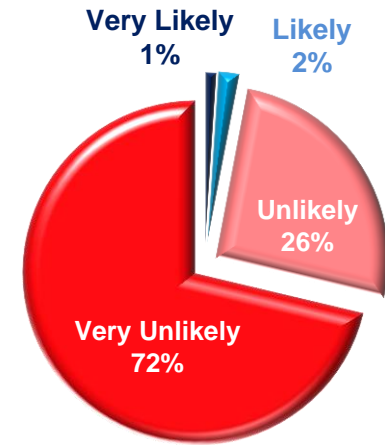
Likelihood to Purchase
Personal Computer in
Coming 12 Months



Likelihood to Purchase
Laptop in Coming 12 Months



Likelihood to Purchase
Video Game Console in
Coming 12 Months



Base: 382

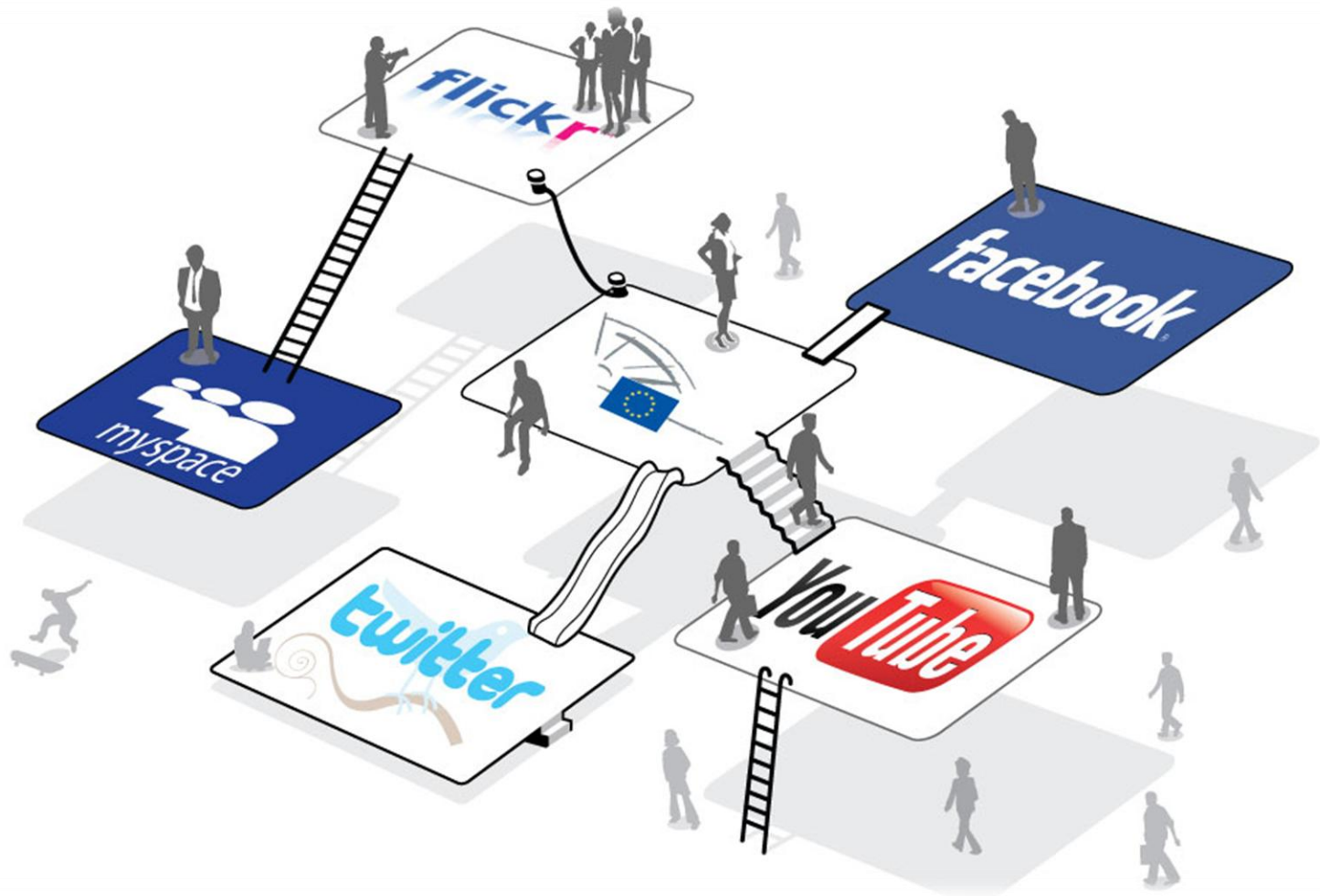
All respondents excluding no answer

Q2B. How likely will you purchase personal computer, laptop, video game console in the coming 12 months?



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Social Media is Now a Key Online Activity

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PC has been the main platform for online activities before the emergence of mobile devices.



In 2010..

- Macau residents spend **20 hrs** per week (12% of time) for their **online activity**

Among them...

- **87%** use PC
- **13%** use Smartphone
- **2%** use Tablet

Source: Macau Association for Internet Research (2011)



Now in 2013...

**Consumers spent
an average of**

28% of their

time ONLINE

(47 hours per week)



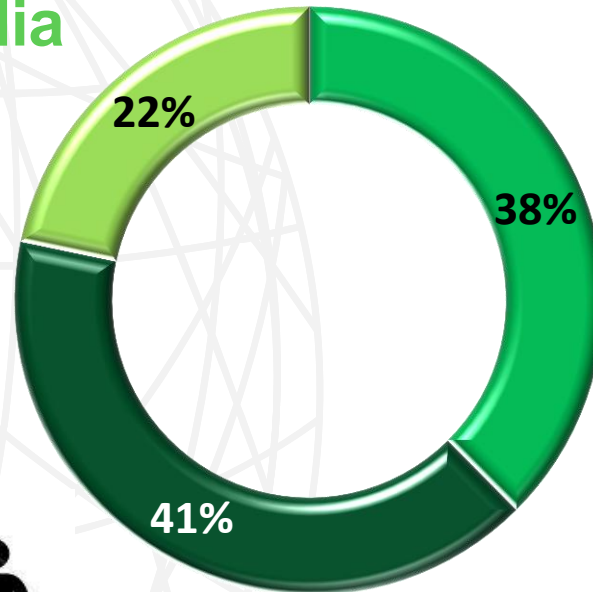
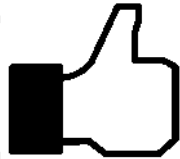
Social Media is becoming an important activity online.



Time Spent on Online Activities

10hrs per week

Social Media



Leisure

18hrs per week



19hrs per week

Business



Base: 331

All respondents excluding no answer

Q3. How much time do you spend on online activities per week for leisure, business and social media?














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Social Media browsing via Smartphone is becoming as frequent as browsing the Internet overall. The use of Tablet for online activities is still not evident.



	# of times (per week)	 Smartphone	 Tablet	 PC
Surfing the Internet	 9	54%	4%	65%
Check status updates or friends' information via social media, exclude messaging	 9	55%	5%	56%
Update status or messaging through social media (e.g. Facebook)	 6	53%	4%	50%
Listen to music, or watch video	 4	42%	4%	40%
Post or Share personal photos, music or video via social media	 4	40%	3%	39%
Download free music/ video/ TV program	 3	37%	3%	40%
Online shopping	 1	21%	2%	29%
For online coupons	 1	11%	2%	14%

Base: 331

All respondents excluding no answer

Q4. How often do you carry out online activities?

Q5. Which of the following devices do you use for the online activities?




Facebook, Google+, YouTube dominate the Social Media scene. Interesting that some consumers consider “search engines” as part of social media, reflecting a misunderstanding of what Social Media is.



27% using 

36% using 

5% using 

55% using 

25% using 

34% using 

12% using 

Base: 331
All respondents excluding no answer
Responses below 5% are not shown
Q6. Which of the following social media sites do you frequently go to for leisure purpose?



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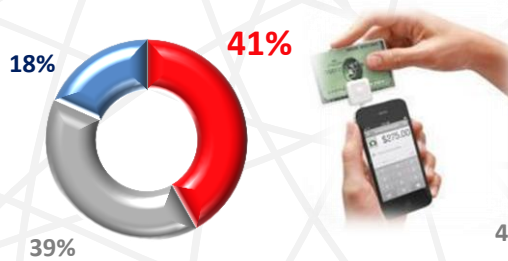


Adoption of Mobile Services is still in early stage as majority of consumers are not currently using them and half are not even considering them yet.

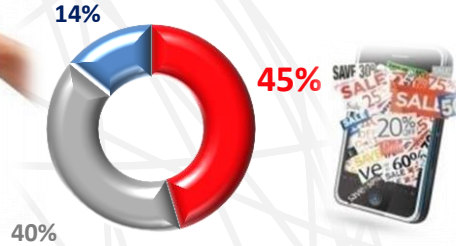


Mobile Service Usage

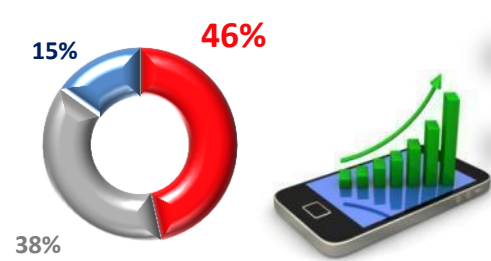
Mobile Payment



Coupons



Location Based Services

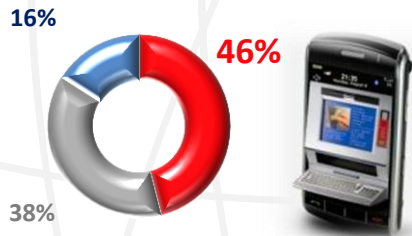


■ Currently use

■ Currently not used but will consider in the future

■ Currently not used and will not consider in the future

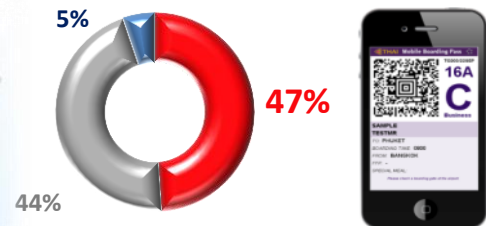
Mobile Banking



MoneySend Services



Mobile Boarding



Base: 380

All respondents excluding no answer

Q7a. Do you currently use the following mobile services? If not, will you consider to use them in the future?



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Some companies already provide mobile services in Macau but it seems consumers are not yet catching on.



Examples of Companies Offering Mobile Services

Mobile Payment



Mobile Coupons



Mobile Banking



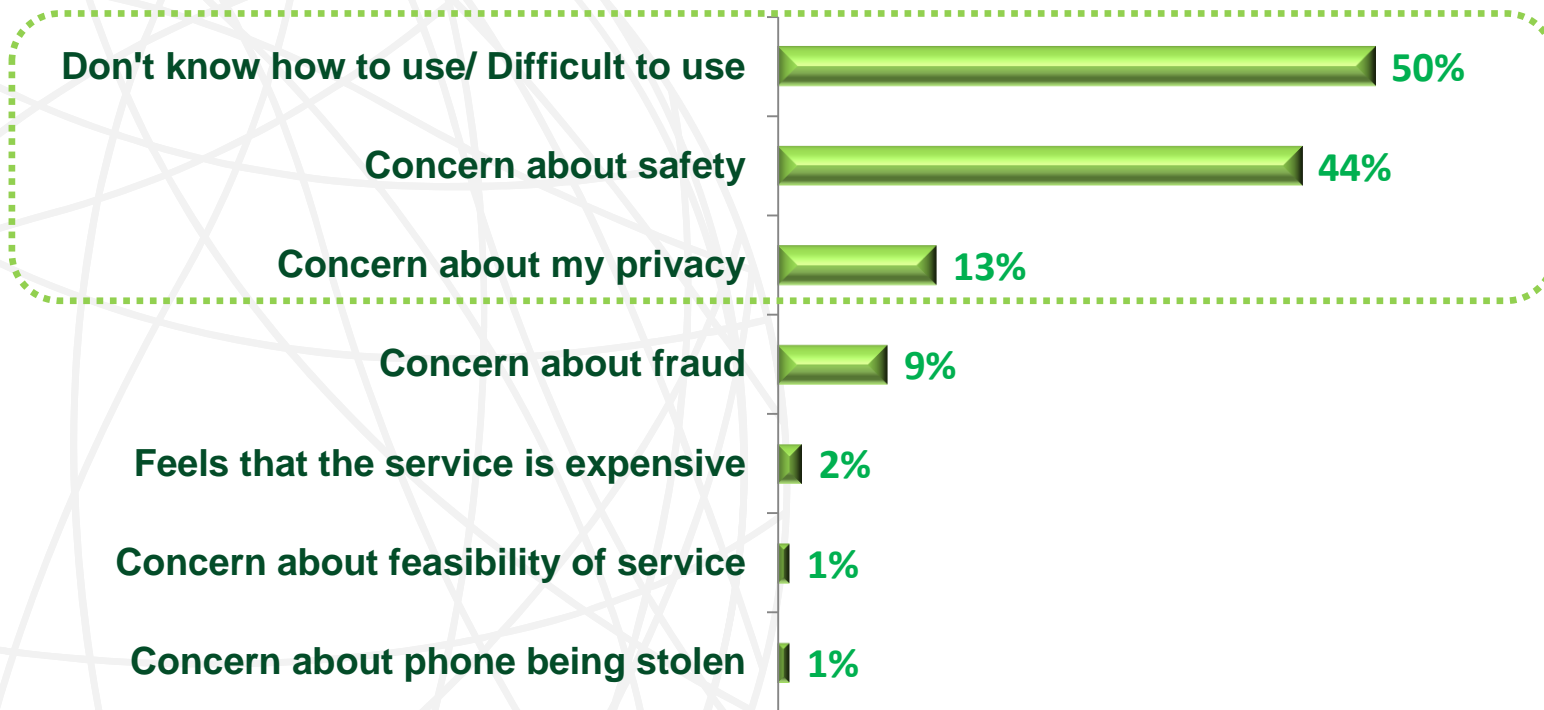
Mobile Boarding



Lack of understanding and safety and privacy concerns are the key barriers of adopting mobile services for Macau consumers.



Barriers of Adopting Mobile Services



Base: 204
Those who will not consider to use at least 1 mobile service
Q7. Why do you not consider using the mobile services in the future?





Thank you!

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