



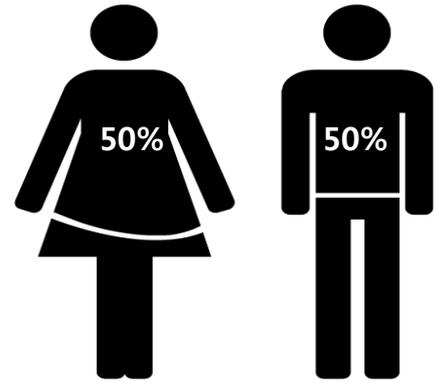
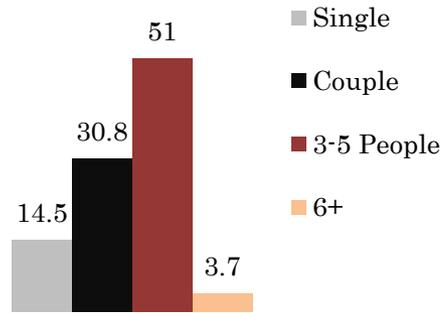
'A window on the lives of Australians'

Peter Harris, Managing Director
Vision Critical Australia & New Zealand

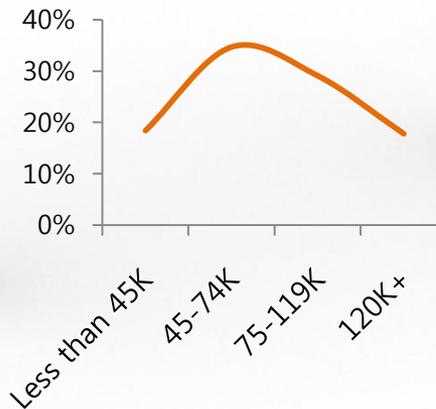


**68% of
Australians own their own home**

HOUSEHOLD



HOUSEHOLD INCOME (USD\$)



Average household income approx. USD\$90K



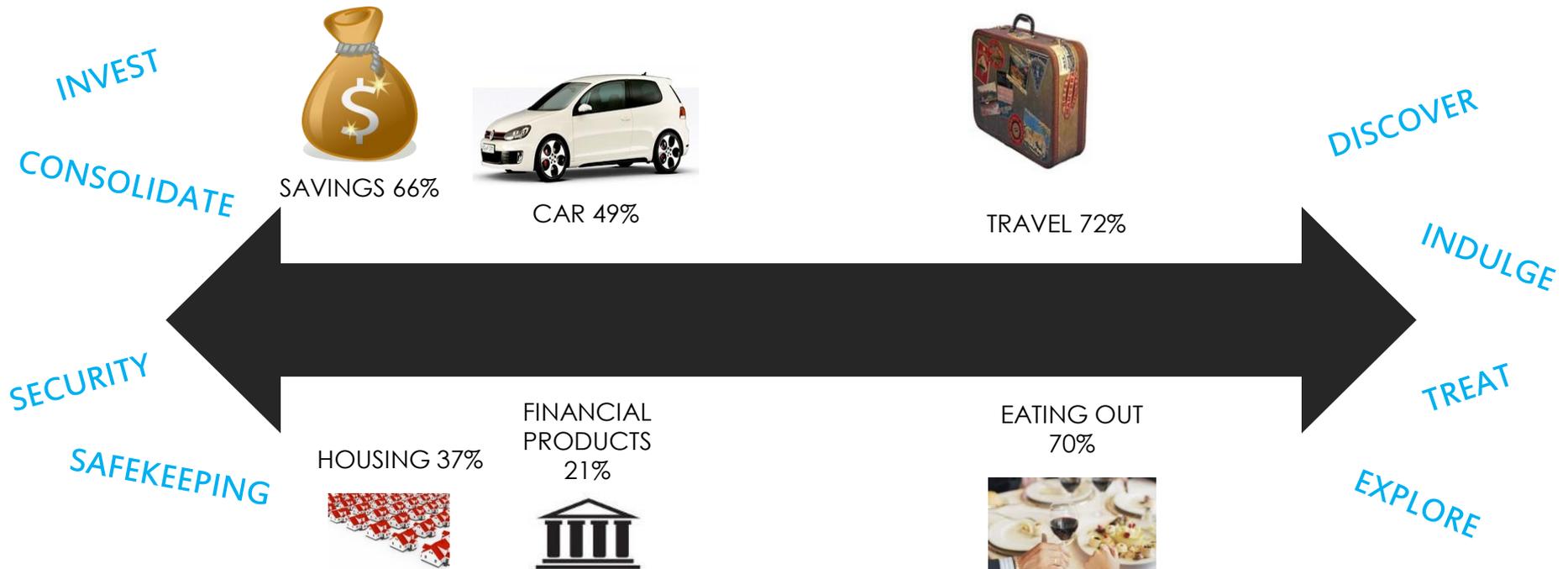
The strength of the economy is driving Aussies' technology aspirations



Australia, alongside Japan, leading the way on video game console ownership relative to other countries surveyed.



For every Australian looking to explore and indulge in 2013, there is another looking to consolidate and invest



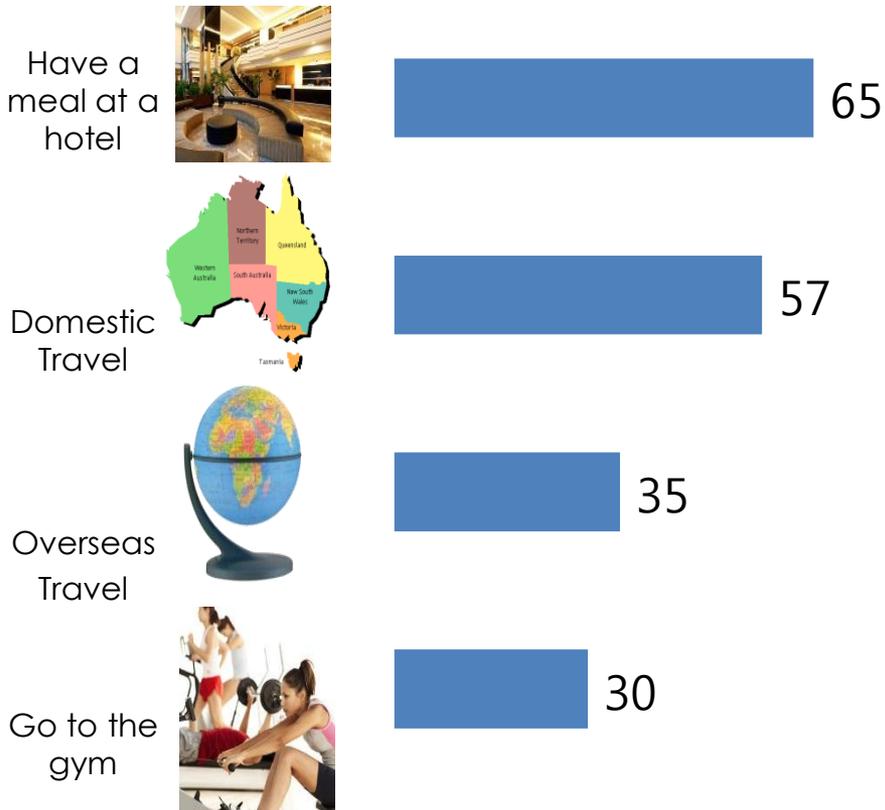
What kind of services would you like to spend money on in future?



Australians are looking to spread their wings in the coming year...

2012

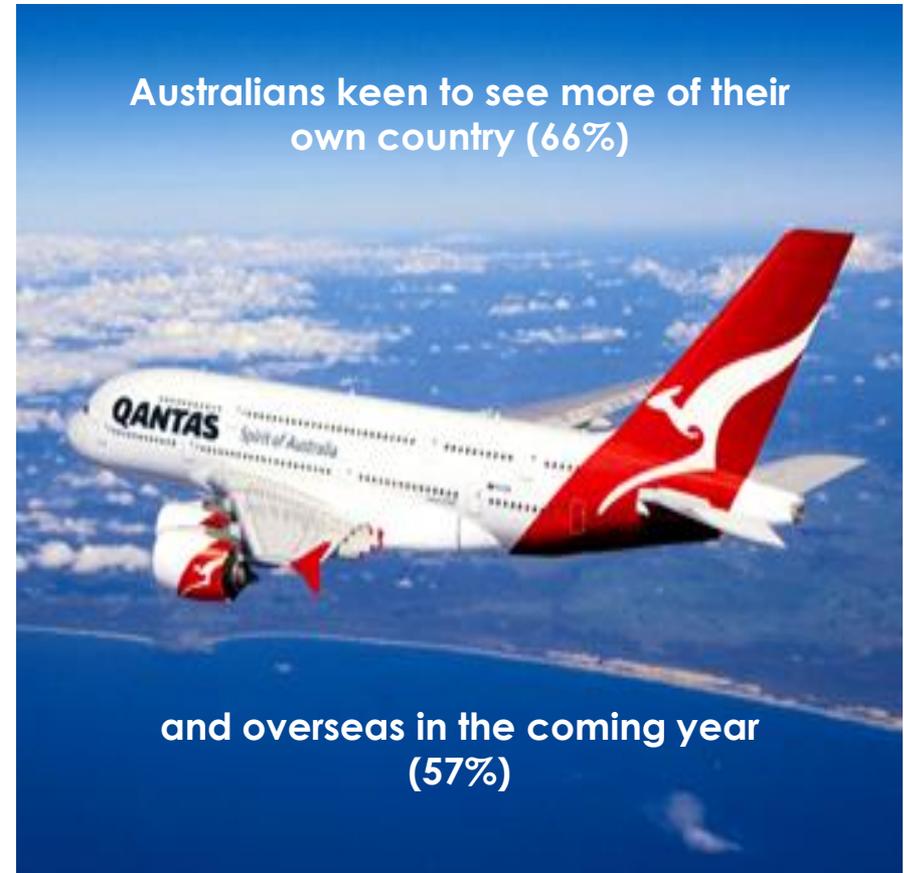
%



Australia is one of the countries least likely to have sent kids to private tutoring or taken a language lesson this year

Please choose all you have done within this year?

2013 & beyond

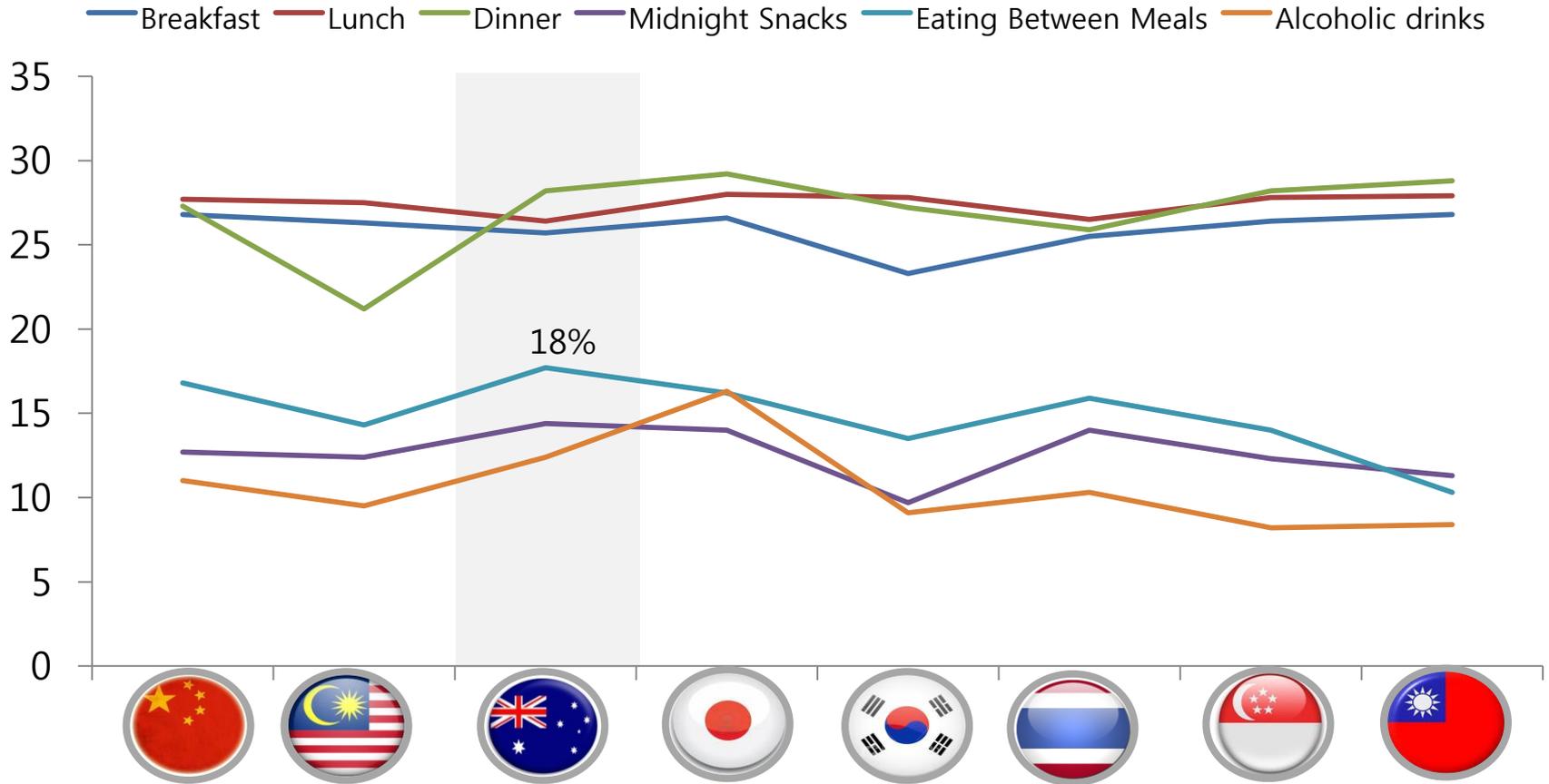


Australians less inclined to consider a new course or language in the coming year

What kind of activities would you like to do in the coming year?

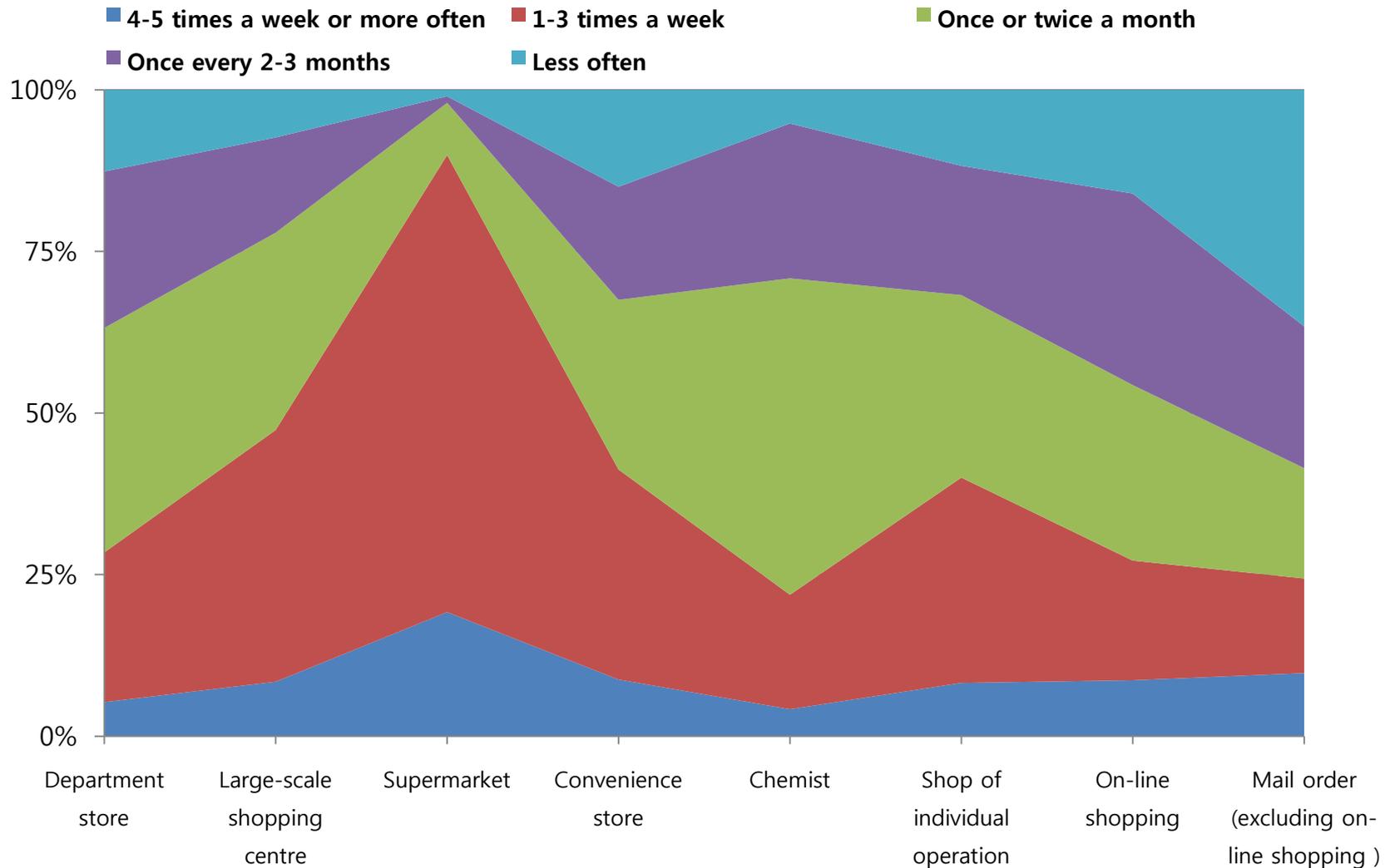


Aussies love to 'graze' ...snacking between traditional mealtimes is more prevalent in Australia relative to other markets



How frequently do you take respective meals/drinks?

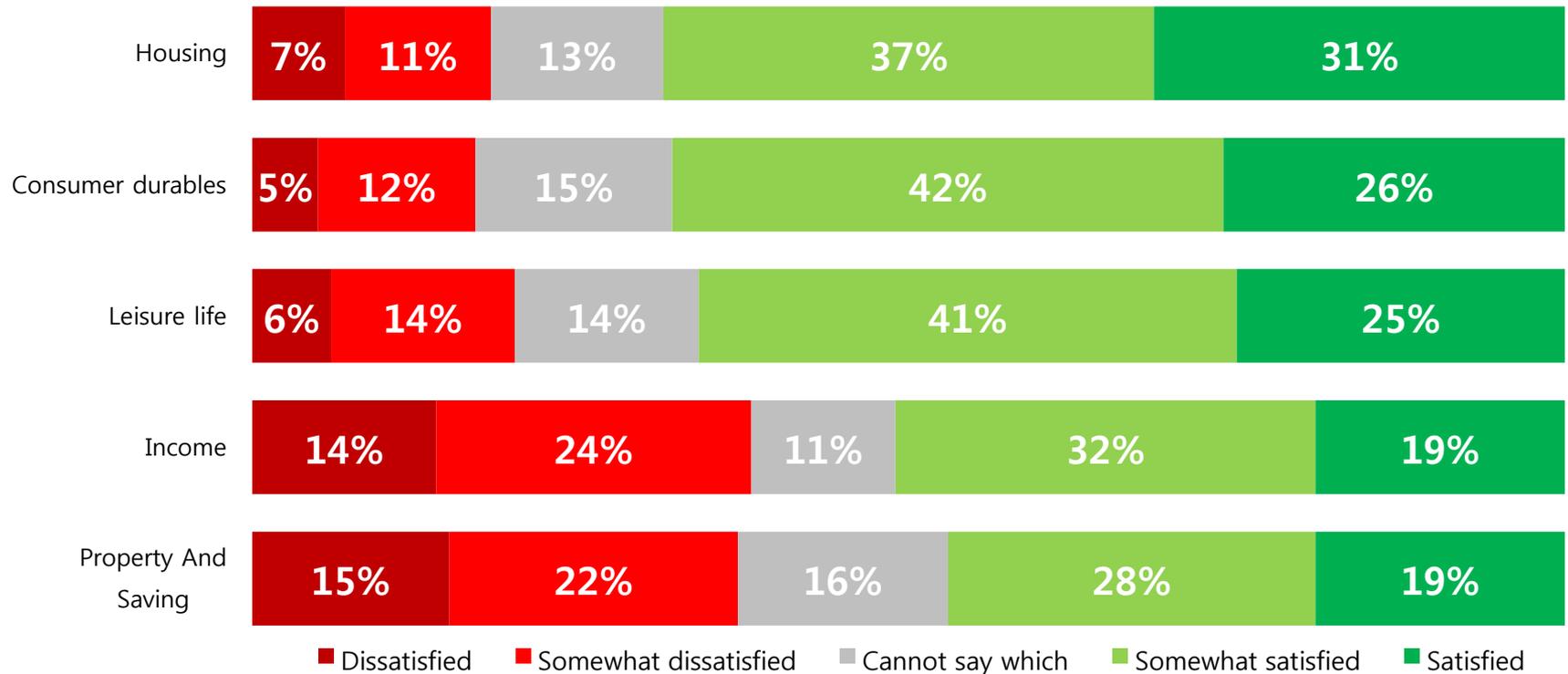
Supermarkets dominate Aussies' shopping habits whilst roughly 1 in 4 are shopping online regularly



How frequently do you shop from the following places?



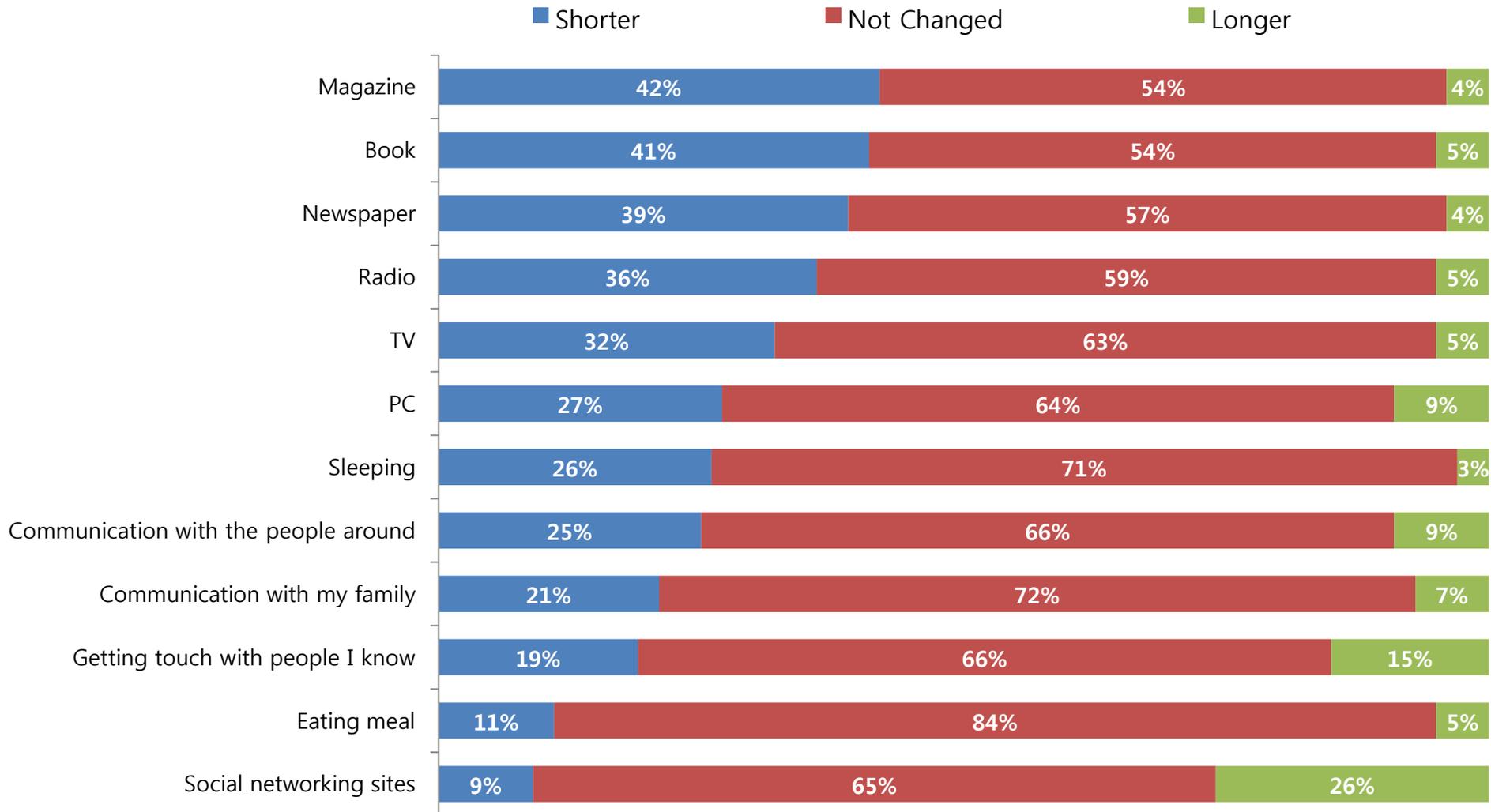
Roughly two-thirds of Australians claim they're enjoying an average or better standard of living



How satisfied are you with each of the following aspects of your life?



The prevalence of smartphones has driven a switch away from traditional media/ offline activities and stimulated social media activity and increased 'connectivity'



What could be different on your usage time of other devices during a day after you started to use your smartphone?



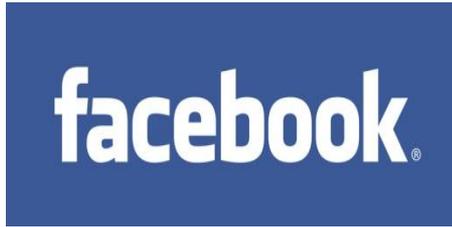
Aussies' online buying behaviour unlikely to change significantly in terms of product categories purchased over the coming months



What kind of products have you ever bought online?



Aussies competing well in terms of FB participation but appreciate the pros & cons of social media



Usage and attitudes towards SNS sites in Australia

- Help me know status of people around me (54%)
- Is time consuming (52%)
- Gives me a feeling of connecting with somebody (46%)
- Is fun to use (45%)
- Makes me more likely to get in touch with people around me (44%)



58% of Australians claim to use their smartphones for less than an hour a day (highest of all 8 markets)

74% of Australians claim they searched online with their smartphone at least once in the last week (lowest incidence of all 8 markets)

Main themes searched for on a smartphone

Weather updates (64%)

Location info (53%)

Restaurants (37%)

Movie info (37%)



For those who own them, smartphones are just as integral to Aussies' lives as their counterparts across Asia

I tend to put my smartphone next to me or hold it while I sleep
 I have free apps on >1 page of my phone that I don't use
 I always get ready to charge my smartphone wherever I go
 I tend to search for info on my smartphone vs. asking someone
 I manage my schedule on my smartphone
 I search for info about my smartphone on my smartphone
 My daily life would be affected a lot without my smartphone

I spend more money on smartphone accessories than the phone
 Often hear people say to me 'stop using your smartphone'
 I have argued with my girl(boy)friend or my family as I use my smartphone too much
 I tend to think other digital devices are touchscreen unconsciously

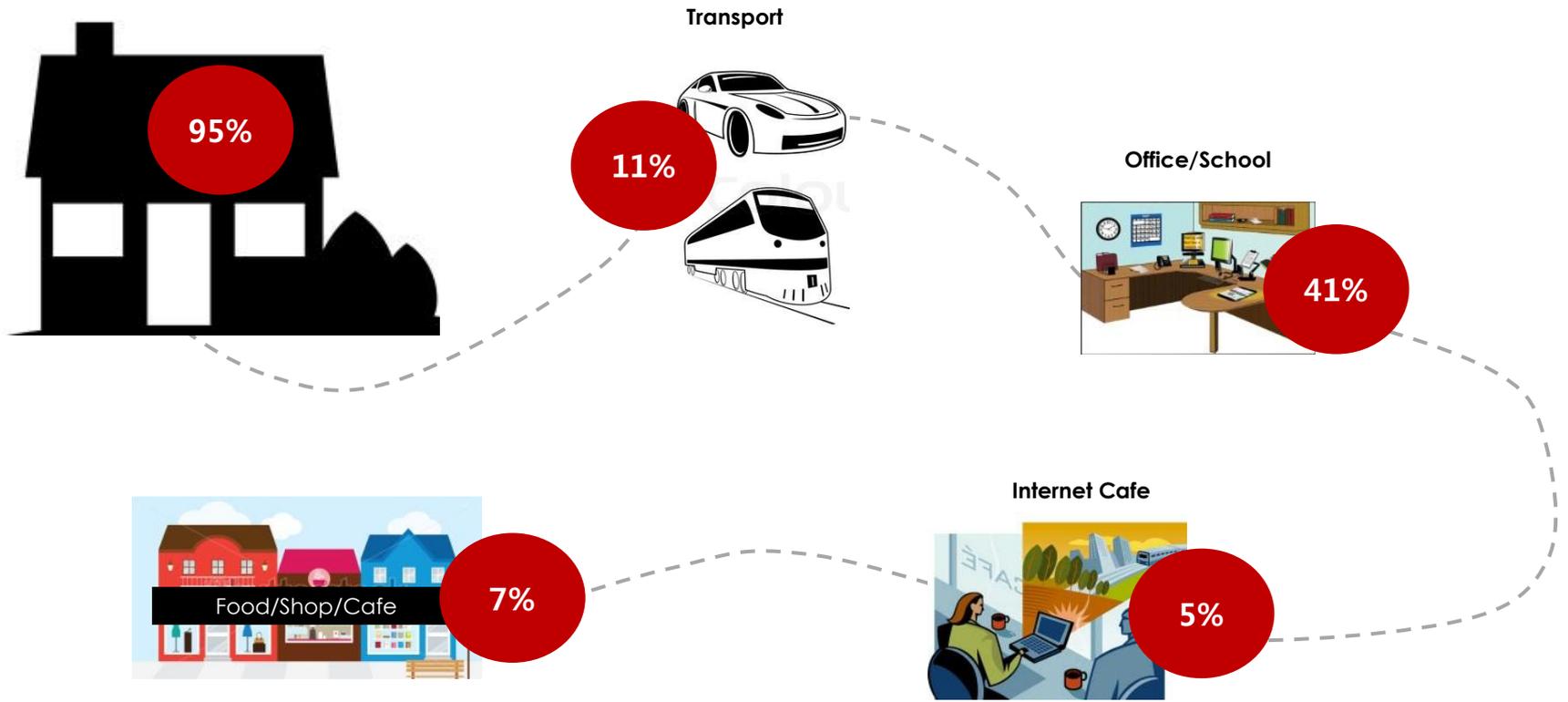


When my smartphone was broken, I felt like I'd lost my friends
 I feel uneasy unless I have my smartphone
 I always feel my smartphone battery runs out too fast
 I tend to take my smartphone when I go to the restroom
 I tend to use my smartphone when meeting friends or colleagues
 I feel smartphones are the most important digital devices
 I have >30 apps on my smartphone and tend to use all of them
 When I meet people with the same phone, we tend to talk about our phone a lot
 I tend to reduce my living expenses to pay for my smartphone





84% of Australians claim they started using the internet at least 5 years ago...but where are they accessing it most often?



91%



39%



...and how are they accessing it?

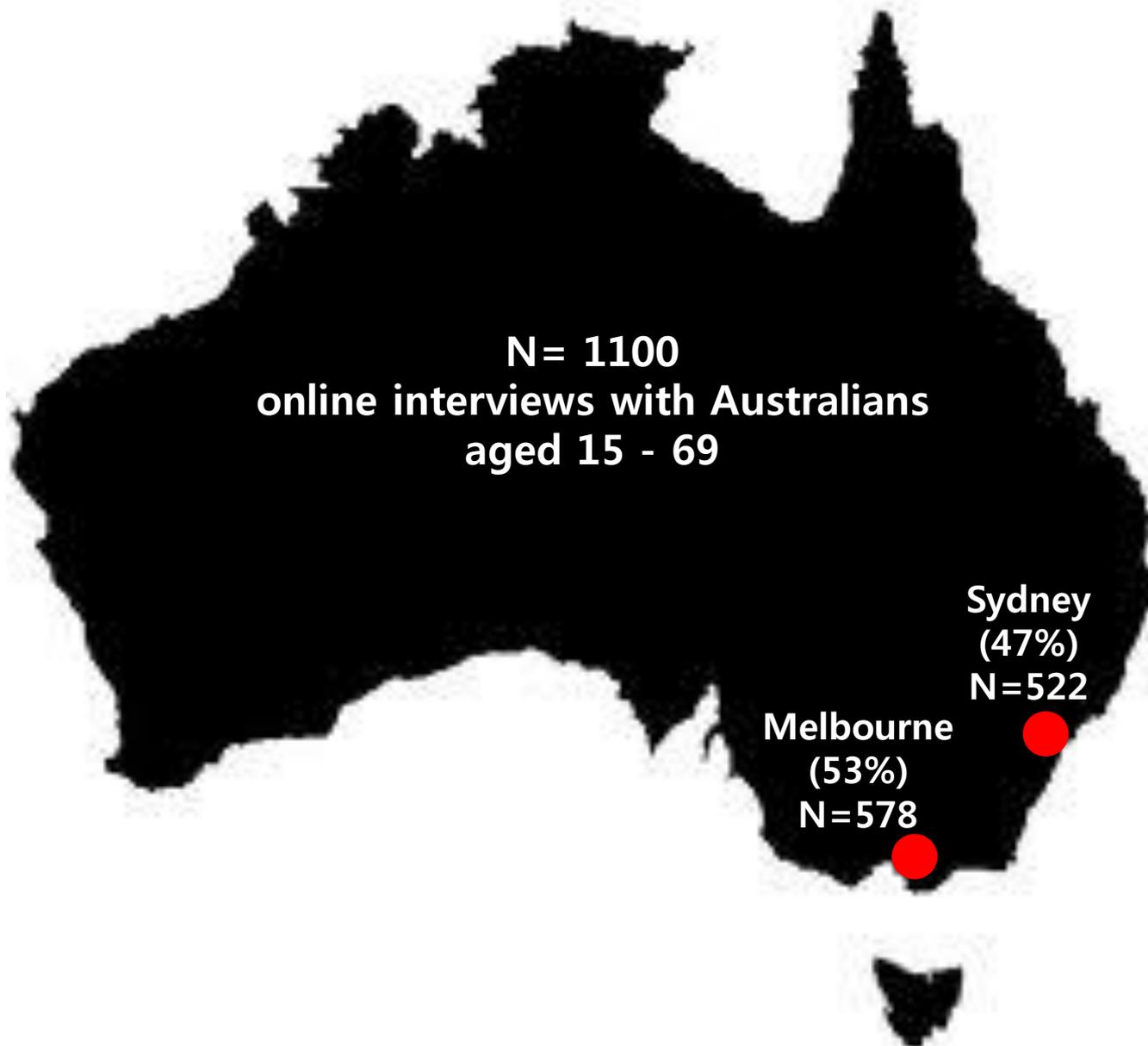
56%



28%



Who did we speak to?



N= 1100
online interviews with Australians
aged 15 - 69

Sydney
(47%)
N=522

Melbourne
(53%)
N=578