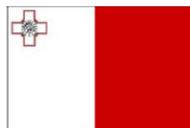




Mobile Device Usage 2019

Summary Report



Operational Programme II - European Structural and Investment Funds 2014-2020
"Investing in human capital to create more opportunities and promote the well-being of society"

Project part-financed by the European Social Fund
Co-financing rate: 80% European Union; 20% National Funds



Contents

1. Introduction	3
2. Methodology	5
3. Executive Summary	8
4. Main Findings	10

1. Introduction

Project Background

Mobile Public Services Take-up project was launched by the Malta Information Technology Agency (MITA) in 2017 with the purpose of increasing the usage and take-up of Mobile Public Services usage. This is in line with the Government's Mobile Government strategy 2017-2018. In view that part of the project focuses on the capacity building of public officers, MITA applied for EU funding under the European Social Funds 2014-2020 Programming Period. This project falls under OP11 and was approved for funding in 2018 (ESF 04.0072). The project comprises of three components, mainly:

1. Capacity-building programme
2. Awareness-raising campaign
3. Research Studies

The **capacity-building** component aimed at training public officials, both technical and front-facing officials in the knowledge of Mobile Public Services. In addition, this project envisaged a knowledge-transfer seminar involving international speakers aimed at public officers.

A number of **awareness raising campaigns** have been delivered on different mobile public services from different super sectors. Such campaigns will be directed towards informing the general public of the Mobile Public Services which are being deployed by Government and

the benefits that can be reaped from the usage of such services. This would eventually lead to greater efficiency in the delivery of mobile government services.

Two **research studies** have been executed during the project with the aim to provide insights and data on how citizens and businesses use Mobile Public Services and their relevance to today's society. Each of the research study has been divided into a qualitative and quantitative section in order to provide a clear picture of the impact this project has had on the general public and businesses. The findings collected will serve as a means for government to continue improving mobile public services.

This report summarises the findings from the second iteration of the research study. The National Statistics Office (NSO) and Business Leaders Malta (BLM) have been commissioned to carry out the quantitative and qualitative section respectively on behalf of MITA. The results being presented in this report come from the quantitative research study carried out in September 2019 and the qualitative research campaign carried out in July/August 2019.

2. Methodology

Quantitative Research

The target population for this survey was persons aged between 16 and 74 years and living in private households. A total of 388,253 individuals were eligible to participate for the survey. A stratified random sampling process was employed; based on subgroups made up of sex, age group, and district of residence. Quotas were used throughout the data collection phase to ensure that the required number of individuals from each sub-group was reached.

The sample was made up of persons living in private households and specific weights were worked out for grossing up the responses to the target population. Data collection was carried out by means of Computer Assisted Telephone Interviews (CATI) and was collected between 16 September and 23 September 2019. Out of a total of 2,114 persons who were contacted for this survey, 1,011 participated by answering the survey via telephone. A series of measures were implemented to certify that optimum quality was achieved. These consisted of quality checks and in-built validation rules in the data collection program; constant supervision during the data collection stage; and further checks during the data-editing and analysis stage.

Survey data was weighted to correct for any biases present in the final sample of participating units arising from different response rates observed in different categories.

Qualitative Research

The Malta Information Technology Agency (MITA) has appointed Business Leaders Malta (BLM) to carry out a qualitative research study on the use of Mobile Public Services. The aim of the study is to understand how members from the public would make use of such services, and to gauge their general experience of some of the online government services currently available. Respondents were asked to access specific Mobile Public Services to provide feedback on the user-experience.

The focus groups covered the following audiences and services:

	Students Maintenance Grants	Clean and Upkeep	Enemalta plc	Malta Fisheries and Aquaculture	Kondotti	VO Funding	eCourts – Police, Justice and Defence	Malta Crafts	BSafe@Work	myHealth
Group 1 - Students	X	X			X		X			
Group 2 - Students	X	X			X			X		X
Group 3 - GP in FT employment			X	X	X	X		X	X	
Group 4 - GP in FT employment		X					X		X	X
Group 5 - GP aged 50+ (non-working)	X	X	X					X		X
Group 6 - GP aged 50+ (working & non-working)		X	X	X				X		X
Group 7 - GP 24-50			X		X	X	X		X	
Group 8 - GP 24-50			X		X	X			X	X
Group 9 - GP 24-50			X		X	X	X		X	
Group 10 - GP 24-50		X		X	X			X		X
Group 11 - GP 24-50		X	X		X			X		X
Group 12 - GP 24-50	X	X			X			X		X

BLM recruited respondents for the focus groups by reaching out to its online community panel. The respondents were asked to complete a screener questionnaire in order to identify and segment them into the group that would be most fitting for them to attend, depending on their demographic profile and any other responses provided to screener questions. The respondents were asked for their consent to participate in the focus group and have the session audio recorded.

All recruited respondents were required to have a basic knowledge of use of smartphones/tablets. Tablets and smartphones were provided to the respondents who preferred not to use their own in order to evaluate the Mobile Public Services indicated by MITA.

Each Focus Group lasted approximately 1.5 hours. All participants were offered refreshments and received a cash remuneration as a token of appreciation for participating in the discussion as per industry practice at the end of the session.

Most of the focus groups were carried out on weekdays from 17:30 onwards, however, some were carried out earlier in the day for certain target audiences. The groups were carried out in Maltese. Representatives from MITA, servizz.gov and respective business owners attended the focus groups as observers.

3. Executive Summary

Quantitative Research

An estimated 78.5% of persons made use of a smartphone and/or tablet. This has seen an increase from the previous study where it was reported that 77.8%¹ made use of a mobile device. For the second study, the highest mobile usage was found to be in age group 16 to 24 years; as opposed to the first study where the highest usage was for the 25-34 age bracket. Both studies also showed that the lowest usage was within the 65 to 74 years age bracket.

With the exception of all other age groups where users declared that they used their phone mainly for incoming and outgoing phone calls; mobile users aged 16 to 34 years, primarily used their mobile device for Social Media. The study also showed that the most popular social media platforms among the population are Facebook, Messenger and YouTube, in that order. This trend has prevailed from the first research study, with Instagram gaining the highest percentage points increase over the first study.

Mobile services offered by government were used by 38.4% of all mobile device users, as opposed to 32.2%¹ in the first study. Highest usage was found among those aged between 16 to 24 years for the second study as compared to the 25-34 age bracket in the first research.

Health was considered to be the most important mobile service offered by government for all age groups, except for the youngest age group. For the latter age group, transport became a priority. This differed from the first research study as Health was considered to be the most important mobile public service offered by government across all age groups.

¹ This figure has been adjusted from the first report due to the revision of the population made by NSO to better reflect the actual population and to be able to compare like with like for both studies

Qualitative Research

The usability of the various applications was **generally well received** by the respondents. However, suggestions for improvements mainly concerned **promotion and awareness** in the Maltese community. In terms of both aesthetic and functional design, various areas for improvement were zoomed in on by respondents in both years, however, more issues and suggestions were brought forward amongst 2019 respondents. In 2019, the respondents made their expectations very clear with reference to organisation of menus and search results.

Whilst some apps were naturally more relevant to some compared to others, weaknesses were noted by others of the above **platforms** such as the usability in terms of design and application structure, lack of any particular information, and the futility of having to decrease mobile phone storage space when there is a website readily available which can be accessed more conveniently through a laptop or tablet. This however excludes 'myHealth' and to an extent 'Clean and Upkeep' which were believed to be commonly used applications, as participants are likely to keep them on their device. In both years, the usability of the digital platforms naturally varied according to the function. A notable similarity in the concluded results is that respondents spoke to generally became unwilling to keep the app on their device due to the limited storage space considering the limited frequency of use of the application.

Similar requests came up between 2018 and 2019 respondents in terms of the **information available** on the apps and websites, primarily increasing the availability and accessibility of links, including examples and instructions and simplifying complex language/jargon.

Respondents in 2018 requested **further contact information** details/having a Contact Us tab whilst in 2019, the respondents went one step further by requesting the possibility of a Live Chat in some cases. In both waves, the respondents indicated that they wanted to have the possibility to print or save any transaction of information that would have been passed on.

4. Main Findings

Quantitative Research

The study shows that 78.5% of all persons made use of a smartphone and/or tablet. Males tended to make use of a mobile device slightly more than females do. The highest usage rates were found to be in age group 16 to 24, followed by the 45 to 54 age bracket. On the other hand, the lowest usage was found to be among those aged 65 to 74 age group (Chart 1).

In terms of mobile device users as a percentage of the population, the highest usage was also found to be in the youngest age group; with 99% of the 16 to 24 years population declaring that they made use of a mobile device. Mobile usage tends to decrease with age; with the lowest usage found to be in the oldest age group (Chart 2).

Overall, the main scope for using smartphone and tablet devices was identified to be for incoming/outgoing phone calls, followed by SMS and social media (Chart 3). The use for incoming/outgoing phone calls ranked first for all the different age groups, except for mobile users aged 16 to 24 years (Chart 4) and those aged 25 to 34 years. Among these young cohorts, mobile devices were predominantly used to access Social Media, followed by incoming/outgoing phone calls and SMS.

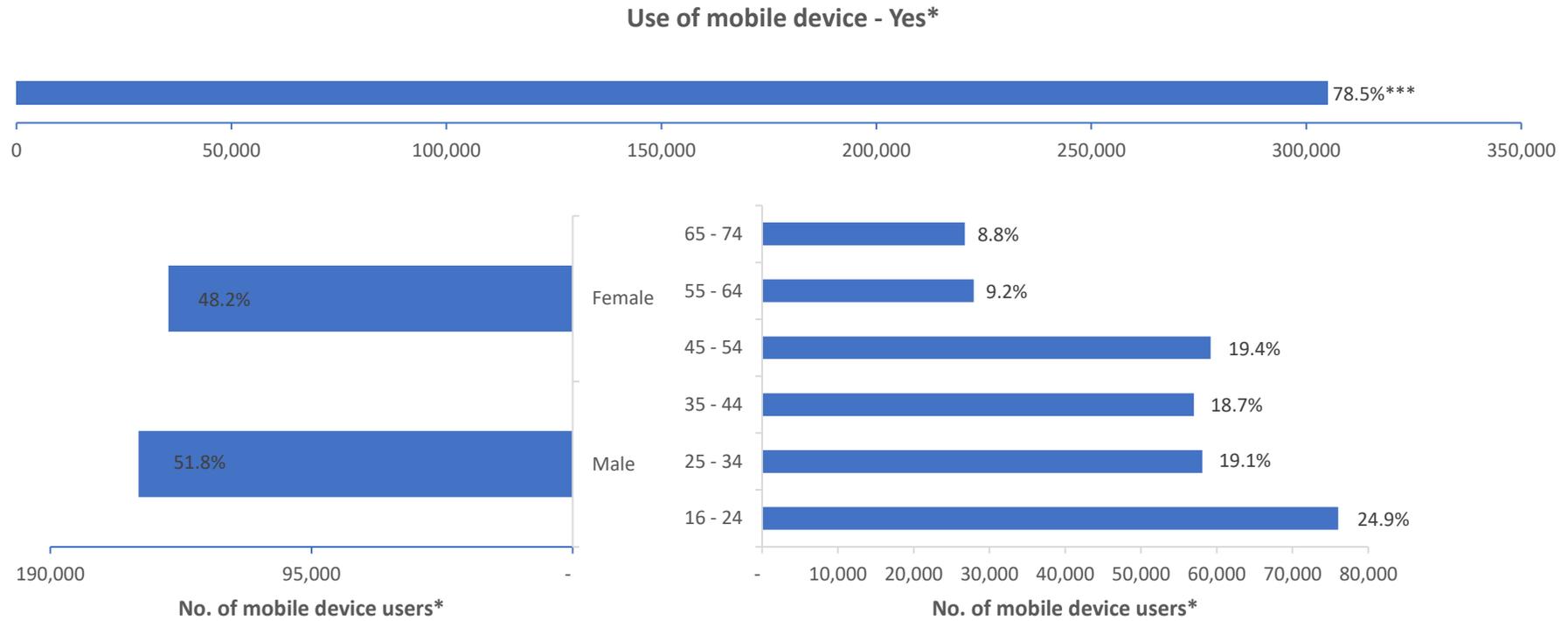
38.4% of all mobile users confirmed that they used their device to access mobile services offered by the government. Usage of mobile government services was highest among persons aged 16 to 24 years (Chart 5). In terms of mobile government service users as a percentage of population, the highest usage was found to be in the youngest age group as well, with almost half of the population of those aged 16 to 24 years declaring that they made use of mobile government services (Chart 8).

In general, smartphone and/or tablet users considered health to be the most important type of mobile government service offered by the public service. This was also the case for both the youngest (16 to 34 years) and the oldest (55 to 74 years) age groups. Users aged 16 to 34 years, considered education and transport as the second and third most important government service offered (Chart 6).

General information and transport came in second and third place respectively among those aged 55 to 74 years (Chart 7).

The most popular social media platform amongst mobile device users was identified to be Facebook, followed by Messenger and YouTube (Chart 9). In all these three cases, when compared to the respective population, the use of social media was highest in the youngest age group. Social media usage declines with age (Charts 10, 11 and 12).

Chart 1 - Mobile device users classified by sex and age group*

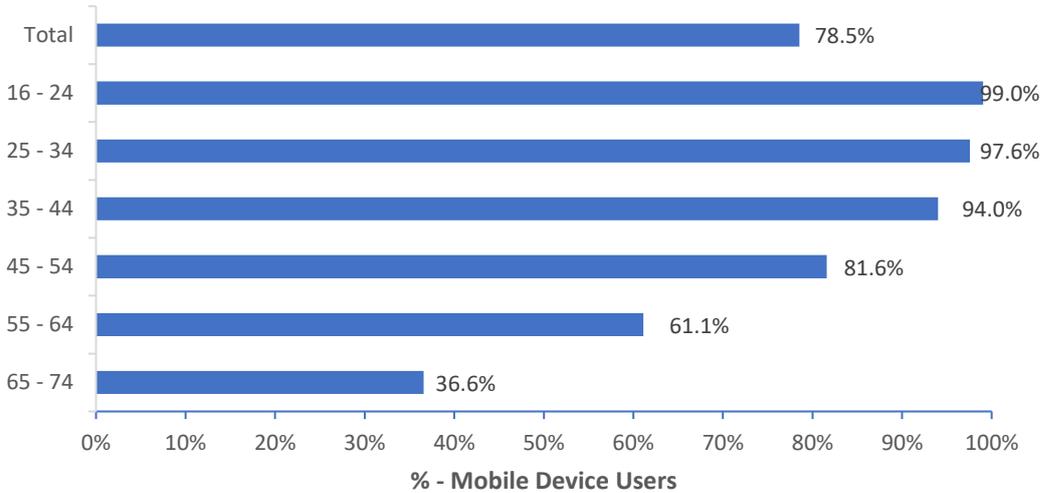


Use of mobile device - No**



* includes only smartphone and/or tablet users (Yes)
 ** includes persons who do not use any mobile device (No)
 *** Percentage share out of the target population

Chart 2 - Mobile Device Users* as a Percentage of Population***, by Age Group**



* includes only smartphone and/or tablet users (Yes)

** Percentage share out of the whole population

*** includes the respective population in each age group

Chart 3 - Top 3 priorities of mobile device users

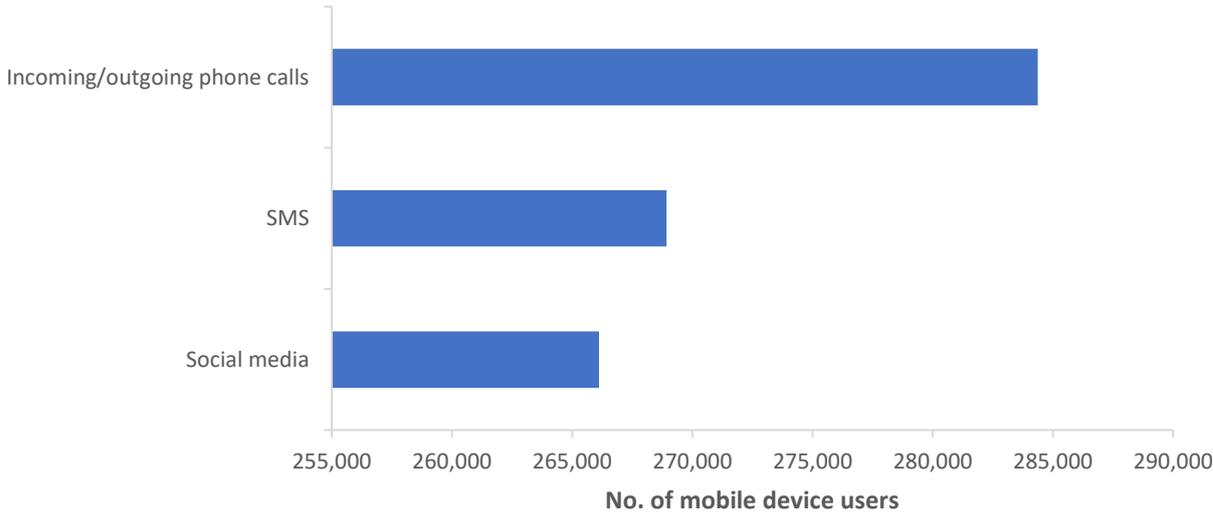


Chart 4 - Top 3 priorities of mobile device users aged 16 to 24 years

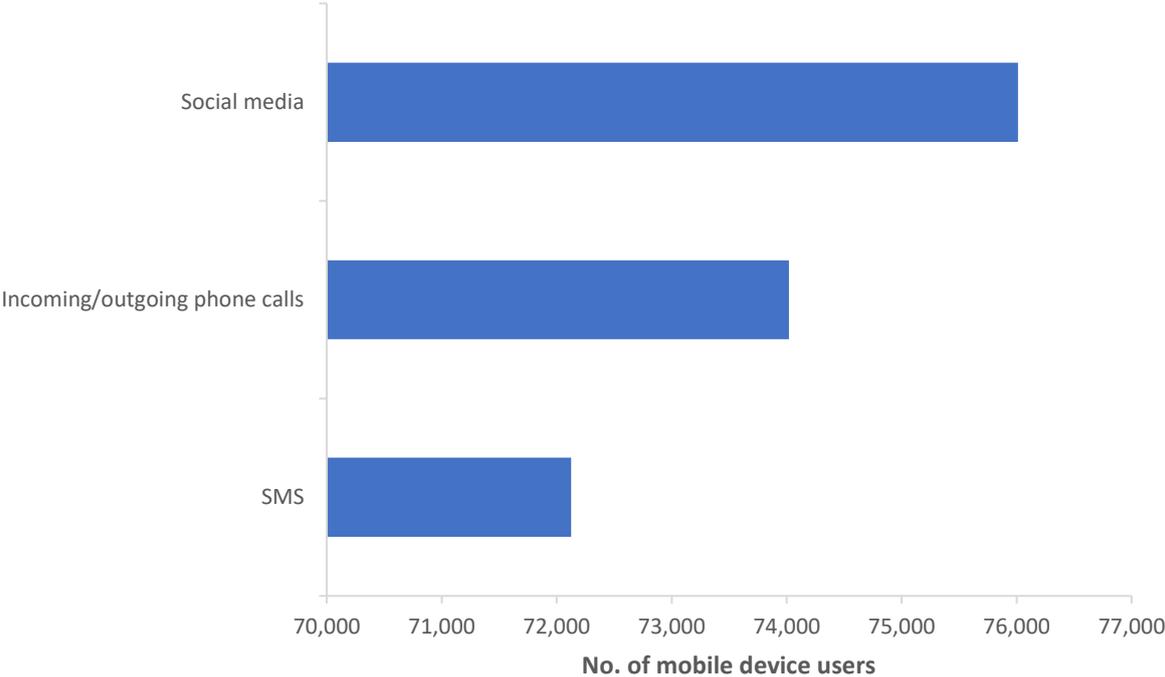
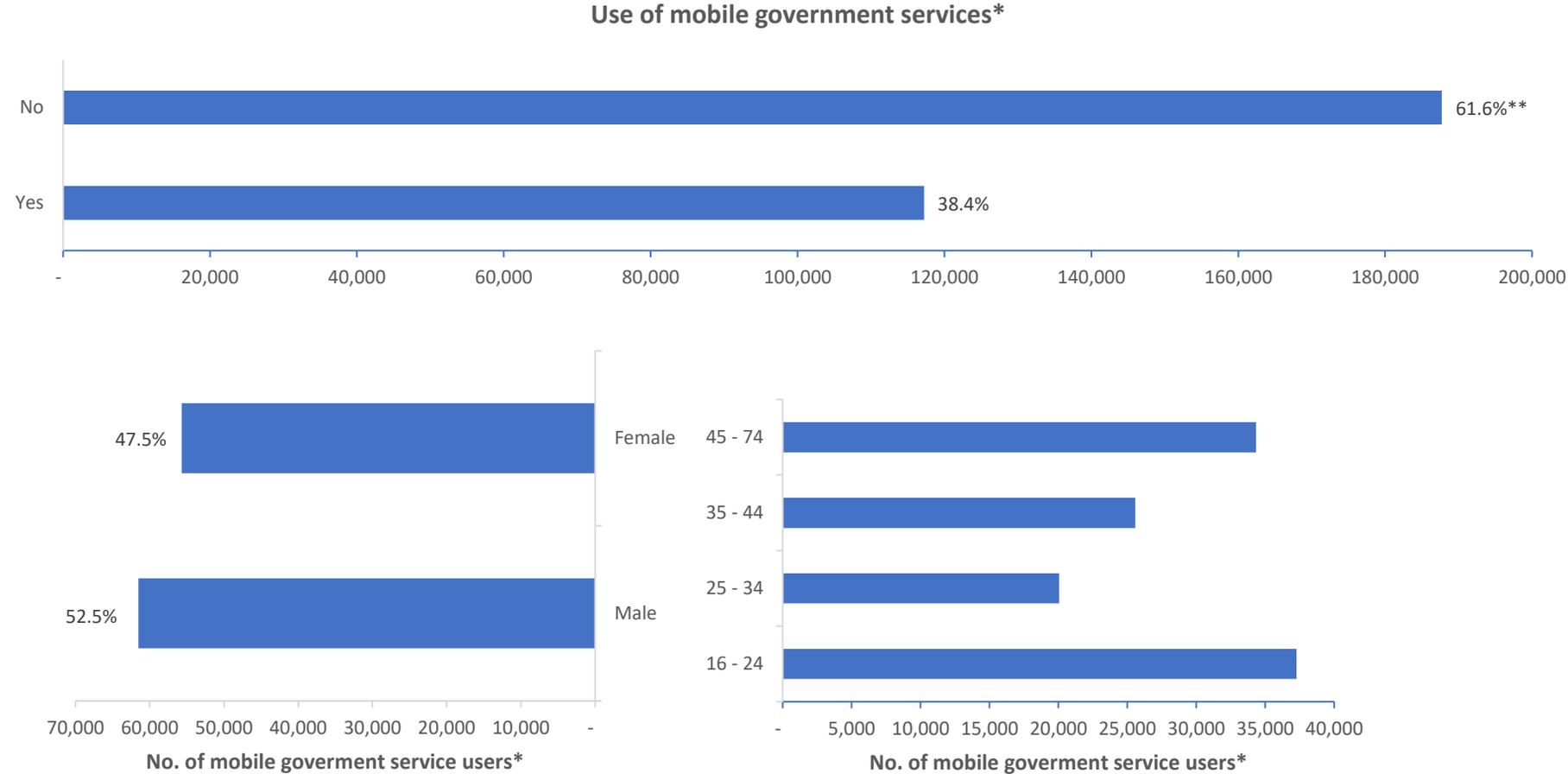


Chart 5 - Use of mobile government services by mobile device users classified by sex and age group



* Percentage share out of the target population

** includes mobile device users who replied either 'No' or 'Do not know'

Note: Because of unreliability issues, age groups 55 to 64 and 65 to 74 in the Chart above, have been combined with age group 45 to 54 and represented as 45 to 74 years.

Chart 6 - Top 3 Mobile government services considered to be a priority by mobile device users aged 16 to 34 years

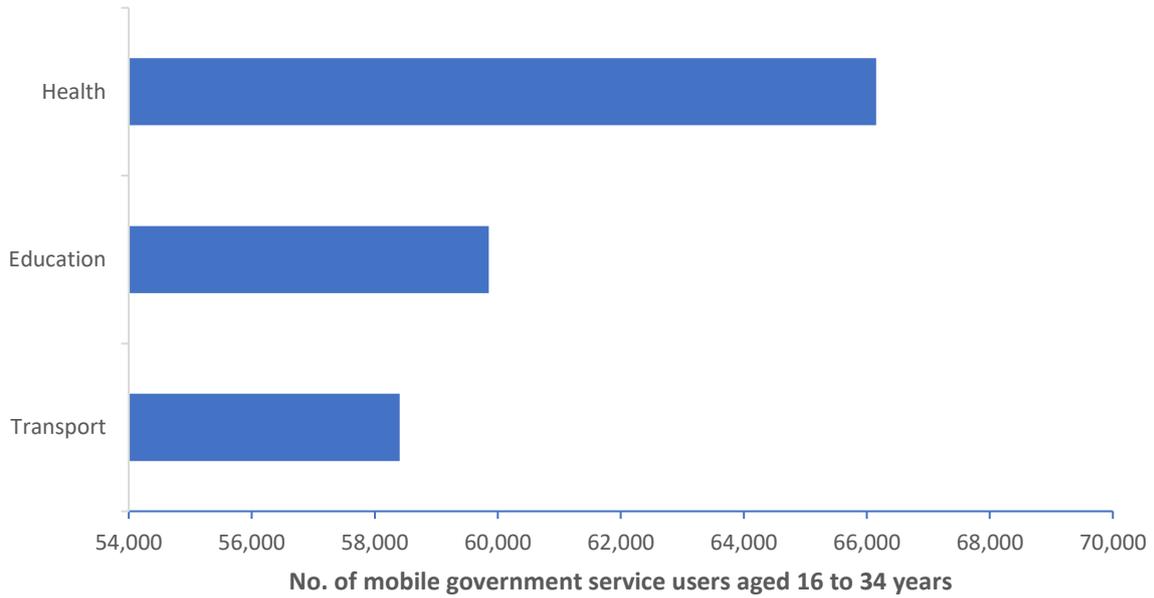


Chart 7 - Mobile government services considered to be a priority by mobile device users aged 55 to 74 years

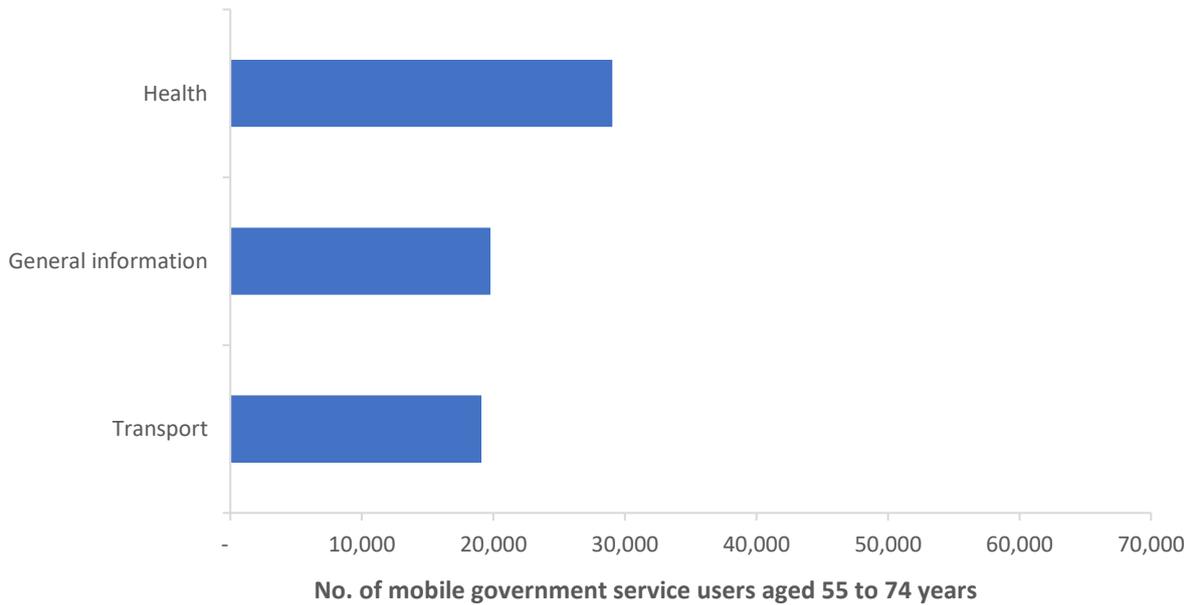
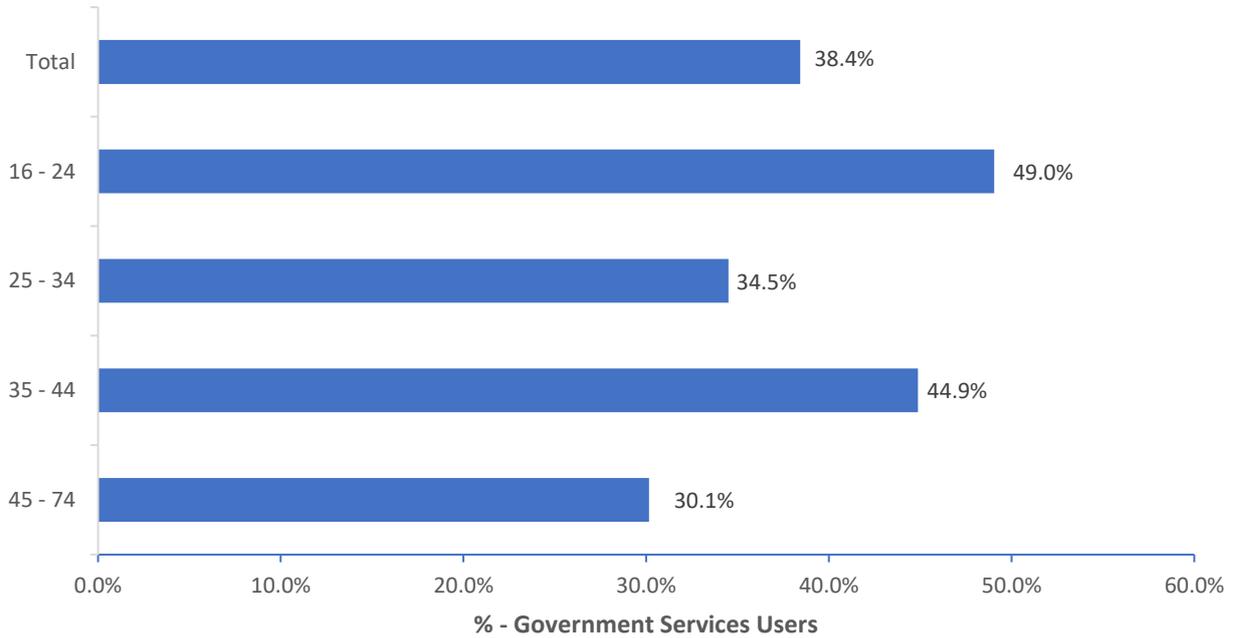


Chart 8 - Mobile government services users* as a percentage of mobile device users, by age group



* includes mobile government services users only (excludes 'No' and 'Do not know' replies).
 P.S. Because of unreliability issues, age groups 55 to 64 and 65 to 74 in Chart 8, have been combined with age group 45 to 54 and represented as 45 to 74 years.

Chart 9 - Top 3 Social media used by mobile device users

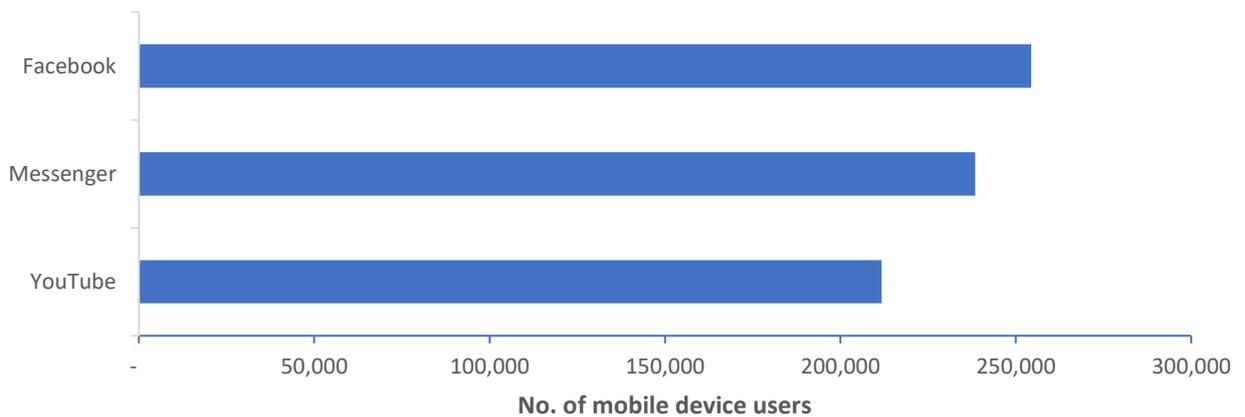
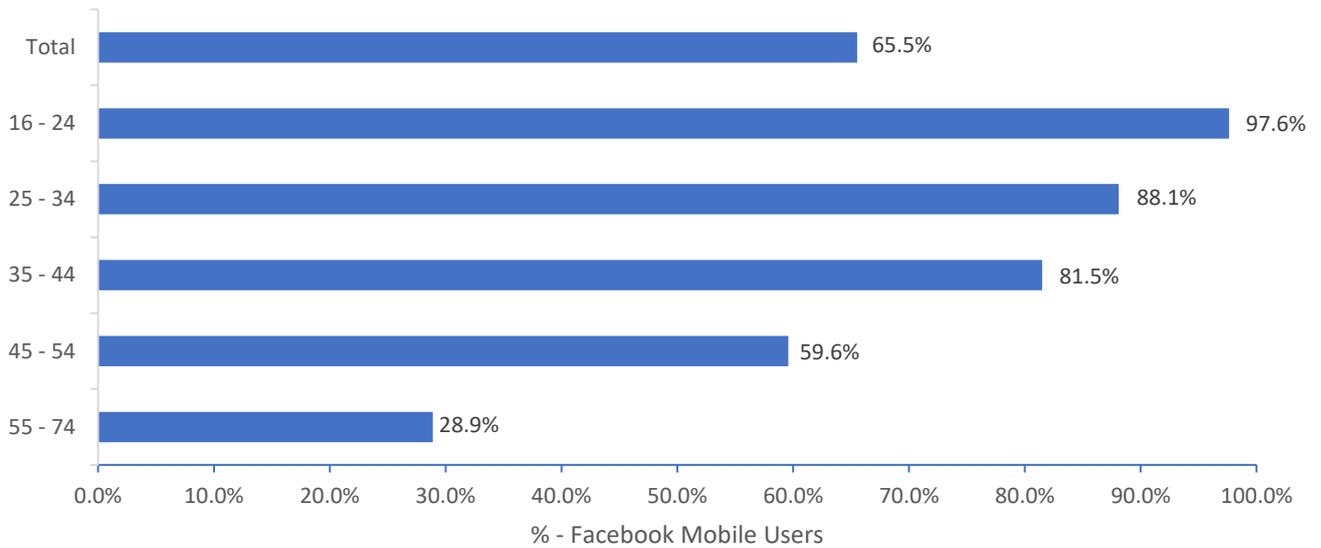


Chart 10 - Facebook Mobile Use* as a Percentage of Population***, by Age Group**



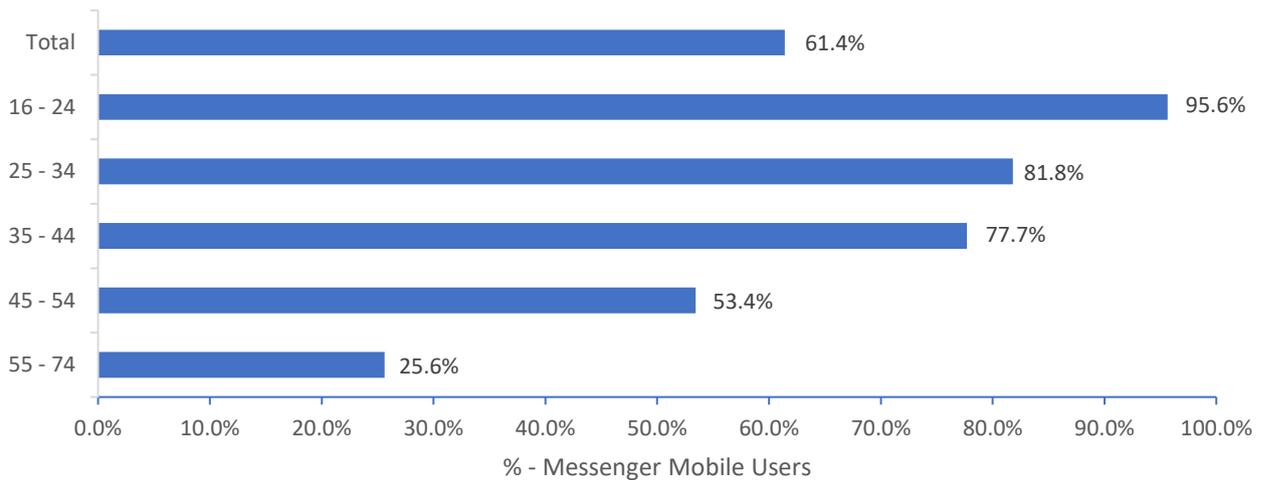
* includes mobile Facebook users only

** Percentage share out of the whole population

*** includes all persons; thus representing the respective population in each age group

P.S. Because of unreliability issues, age group 65 to 74 in Chart 10, has been combined with age group 55 to 64 and represented as 55 to 74 years.

Chart 11 - Messenger Mobile Use* as a Percentage of Population***, by Age Group**



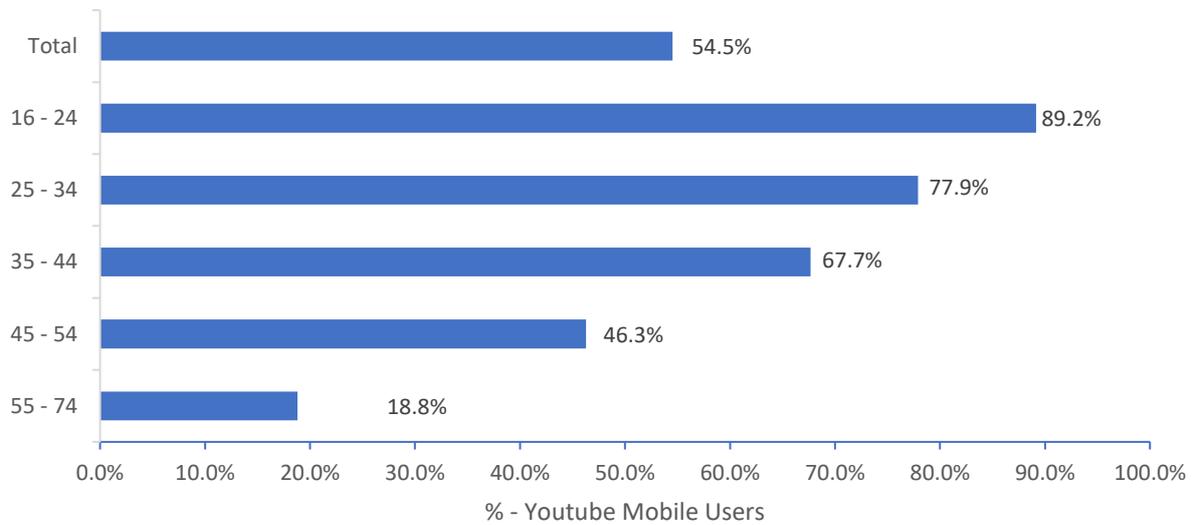
* includes mobile Messengers users only

** Percentage share out of the whole population

*** includes all persons; thus representing the respective population in each age group

P.S. Because of unreliability issues, age group 65 to 74 in Chart 11, has been combined with age group 55 to 64 and represented as 55 to 74 years.

Chart 12 - YouTube Mobile Use* as a Percentage of Population***, by Age Group**



* includes mobile YouTube users only

** Percentage share out of the whole population

*** includes all persons; thus representing the respective population in each age group

P.S. Because of unreliability issues, age group 65 to 74 in Chart 12, has been combined with age group 55 to 64 and represented as 55 to 74 years.

Qualitative Research

The aim of the study is to understand how members from the public would make use of such services, and to gauge their general experience of some of the online government services currently available. Respondents were asked to access specific Mobile Public Services to provide feedback on the user experience.

Applications

The following are the applications that were evaluated throughout the discussions:

- Students Maintenance Grants
- Clean and Upkeep
- Enemalta plc
- Malta Fisheries and Aquaculture
- Kondotti
- VO Funding
- eCourts – Police, Justice, and Defence
- Malta Crafts
- BSafe@Work
- myHealth

In general, some key observations and recommendations from the study are as follows:

- An increase in awareness levels on the availability and usability of the tools are requested
- Websites that are responsive to different devices will help improve the user-experience

- In cases where reports are done users claim the importance of keeping the user up-to-date with follow-ups (whereby one can select to receive push notifications)
- The respondents felt that all of the Maltapps services evaluated were well segmented and liked the favourite section tab
- There were several comments whereby the respondents expected that once they would have downloaded Maltapps they would find all the services within it (without much consideration for the size of the application)
- There was a suggestion for harmonisation of apps to look the same as much as possible
- As a rule, respondents generally agreed that when going into an app they should be able to select the language in the beginning
- Services that are expected to have frequent use and that are currently only available on a website should be developed into an application (this was mostly mentioned with reference to the myHealth website)
- Apps having the most frequent use are most likely to be kept on one's device.