

Mobile Social Networking 2009-2014

Chart 3.1: Fixed-line Activities, Dec 2007-Dec 2008

Rank	Sector	Global Active Reach Dec 07	Global Active Reach Dec 08	% Point Increase in Active Reach
1	Search	██████████	██████████	██████████
2	General Interest Portals & Communities	██████████	██████████	██████████
3	Software Manufacturers	██████████	██████████	██████████
4	Member Communities	██████████	██████████	██████████
5	Email	██████████	██████████	██████████

Source: Nielsen

As we can see from the chart, the popularity of member communities increased by over 10 percentage points between December 2007 and December 2008. This increase was also more than twice that of any of the other four internet sectors.

3.2.1. Increased Time Spent on Social Networks

Social network adoption has varied from country-to-country with some witnessing quicker subscription uptakes than others as is shown in Chart 3.2. As can be seen Germany witnessed the smallest adoption levels of the countries featured in 2007, however conversely in 2008 it saw the highest increase in online member community website reach.

The chart illustrates how different cultures and methodologies between countries affect the user uptake of social networks and communities. Consequently citizens from some countries have a more reserved approach to giving out personal information, thus membership figures on social networks is low. Visiongain believes this fact will also be reflected in the subscriber levels that will be seen in mobile social networks, with some countries seeing greater usage levels than others.

Mobile Social Networking 2009-2014

7. Future of Mobile Social Networking

7.1. Future key Industry Trends

7.1.1. Cost of Data Services

Mobile operators must ensure that data services are priced effectively in order for mobile social networking to be utilised to its maximum potential. A number of potential pricing strategies can be put into place, based on data used, priced as a flat rate or as part of a bundled package for example. Visiongain believes it is critical that consumers are given enough service options to choose from, thus increasing the likelihood of them utilising the mobile web and social networks as a result.

Communities generate great usage, due to the interactive nature and communication that takes place between users. People are spending increasingly more of their time online social networking than they are sending and receiving emails. This trend is set to be reflected on mobile, with users obsessively checking and updating their social network pages.

7.1.2. User Interface

Handsets are continuing to develop, therefore providing more attractive and appealing user interfaces. The Apple iPhone helped introduce the internet browsing to the mass markets, with full web browsing made easy with its large screen and touch-screen technology.

As a result, competitors have looked to bring out their own handsets capable of challenging the Apple iPhone. At the time of writing, the majority of handset manufacturers have launched their own touch-screen handsets, Nokia being one of the last to do so when it launched the Nokia 5800 in October 2008. RIM even launched its first touch-screen handset, the Blackberry Storm in Q4 2008, illustrating how it wanted to target consumer users as well as business users.

The introduction of touch-screens has facilitated web browsing on mobile. Consequently, it is now easier and more appealing to use the web and social networks on mobile, rather than for users to

Mobile Social Networking 2009-2014

wait until they have access to a PC/laptop. The continuing inclusion of full QWERTY keyboards is also aiding mobile users, making it easier to navigate the web and construct messages when on mobile social networking sites.

December 2008, also saw the launch of the INQ1 handset, which at the time was also dubbed the "Facebook phone," due to its integration with Facebook, with messages and pokes from the social network being delivered in the phone's inbox together with standard SMS and MMS. Visiongain believes more handsets will be introduced in the future incorporating social networking services. Consequently, with the user interface being greatly improved, mobile social networking will increase as a result

7.1.3. Increased Awareness

Operator deals carried out by the likes of Facebook and MySpace placing them "on deck" have helped significantly raise awareness of the mobile capabilities of the major social networks in the market. Mobile users will be able to quickly and easily access their favourite social networking services, with more and more operator deals being carried out.

7.1.4. Driving Mobile Internet Usage

The increasing popularity of mobile social networks is helping to drive the growth of mobile internet usage as a whole. As of November 2008, the UK had the highest penetration of mobile social networkers in Europe, as can be seen in Table 7.1.

Table 7.1: European Mobile Social Network Penetration

	% Mobile social networking users who exclusively use social media	Y/Y Change in social networking via browser or application	Mobile social networking users as % of all mobile phone users
Germany	████	████	████
Spain	████	████	████
France	████	████	████
Italy	████	████	████
UK	████	████	████
Total	████	████	████

Source: comScore M:Metrics