



**Mobile Web Trends 2012 Interim
First 3 Quarters 2012**

A white paper from 51Degrees.mobi

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Introduction

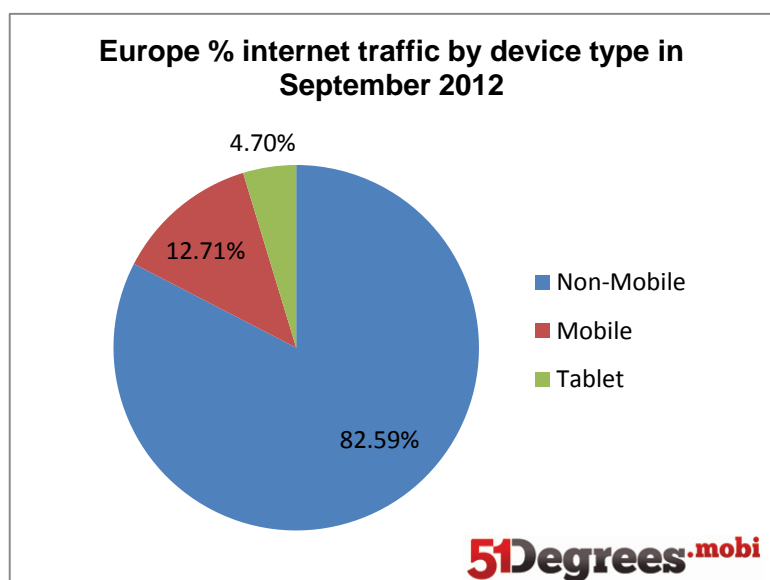
This whitepaper provides an insight into current web usage trends by mobile devices. Analysis is based on the results obtained from the 51Degrees.mobi [Mobile Analytics](#) product. 51Degrees.mobi receives real-world internet usage data from more than 240,000 servers using their products to detect the capabilities of devices accessing a web site and optimise the response. Known as server side responsive design or RESS the technique is an increasingly popular method for web sites to provide an optimized user experience to an ever growing variety of devices.

Rise of the Tablet

Within one year of the iPad launch, Q2 2010 through Q1 2011, tablet visits represented 1% of total website visits. One year later tablets now represent 4.7% of total usage in Europe.

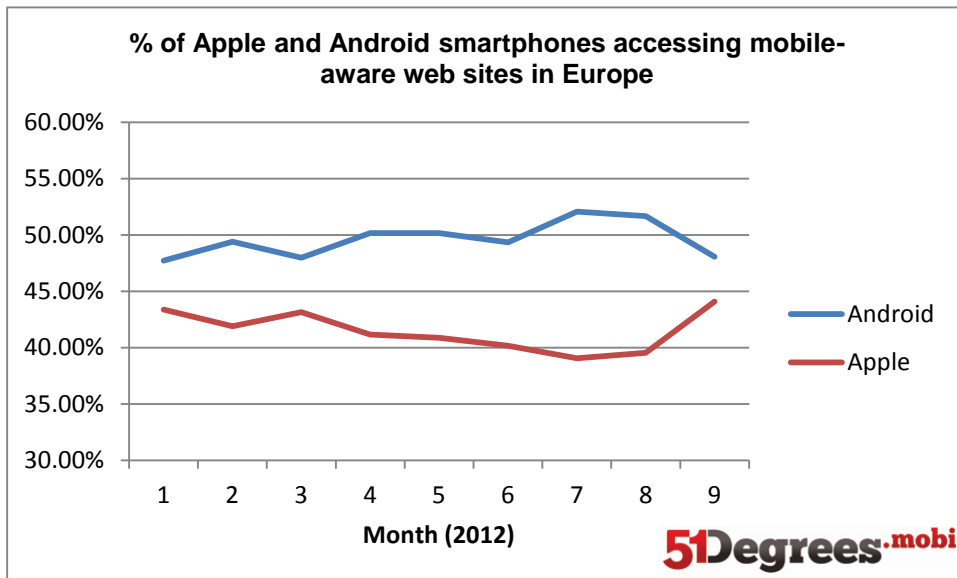
In the EU5, comprised of France, Germany, Italy, Spain and the United Kingdom, the results from September 2012 indicate mobile phones account for over 12% of the visits to mobile-aware websites. Tablets and mobile phones combined represented more than 17% of total usage.

Figures for the United States are similar.

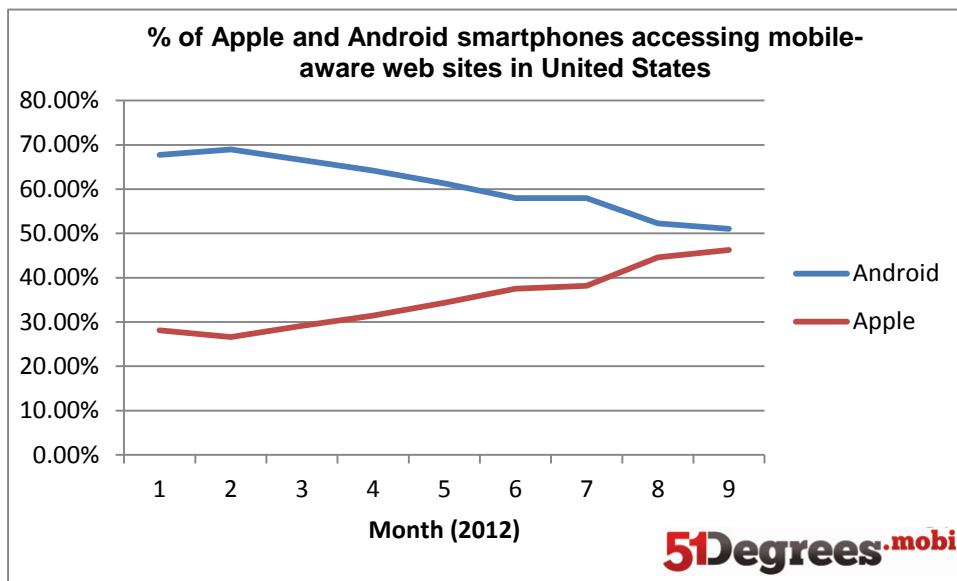


Android and Apple

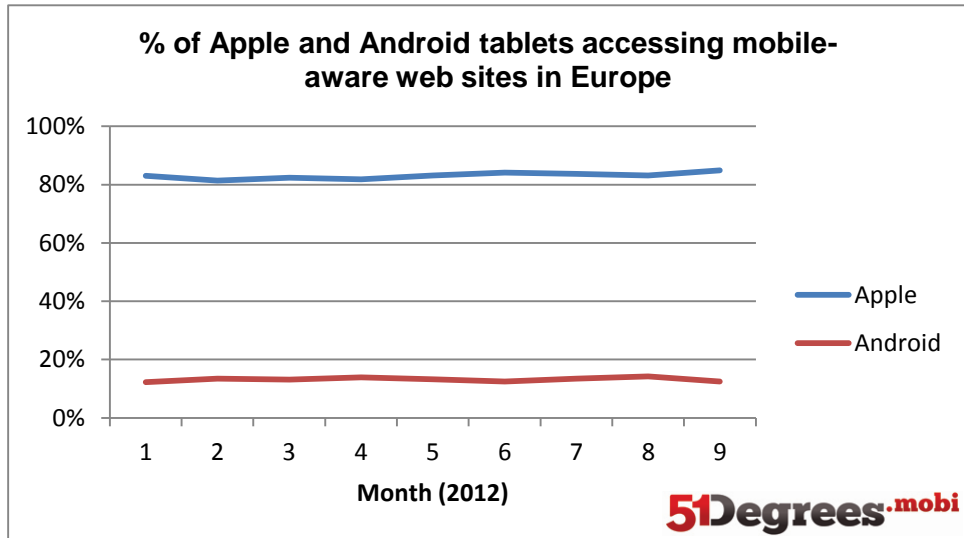
Considering the share of web visits from smartphones only in Europe, Android increased its lead over Apple before moving back to 48% and 44% respectively during September 2012.



Apple's share of web visits in the United States has increased from 28% to 46% in the US, whereas the share for Android has decreased from 68% to 51%. If this trend continues, then Apple will re-emerge as the leading operating system for smartphones in the US by the end of 2012.

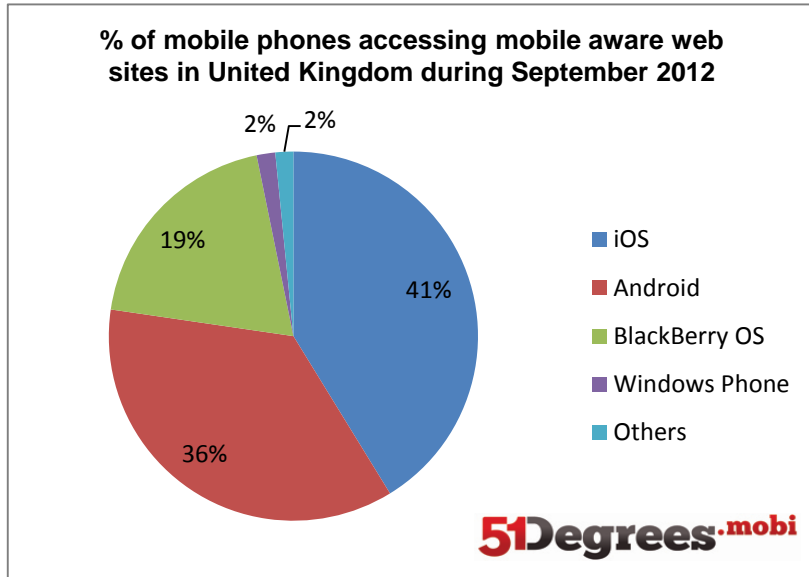


Apple is still the dominating tablet brand with 85% of total usage during September 2012 in Europe.

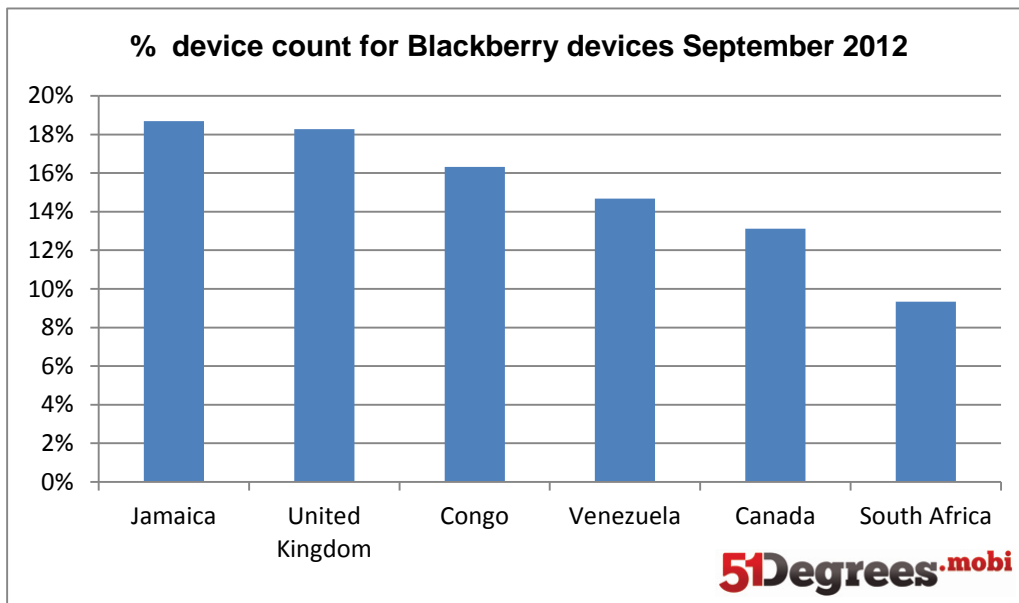


Blackberry

Blackberry remains very popular in the United Kingdom with 19% of total usage from mobile phones in September 2012.

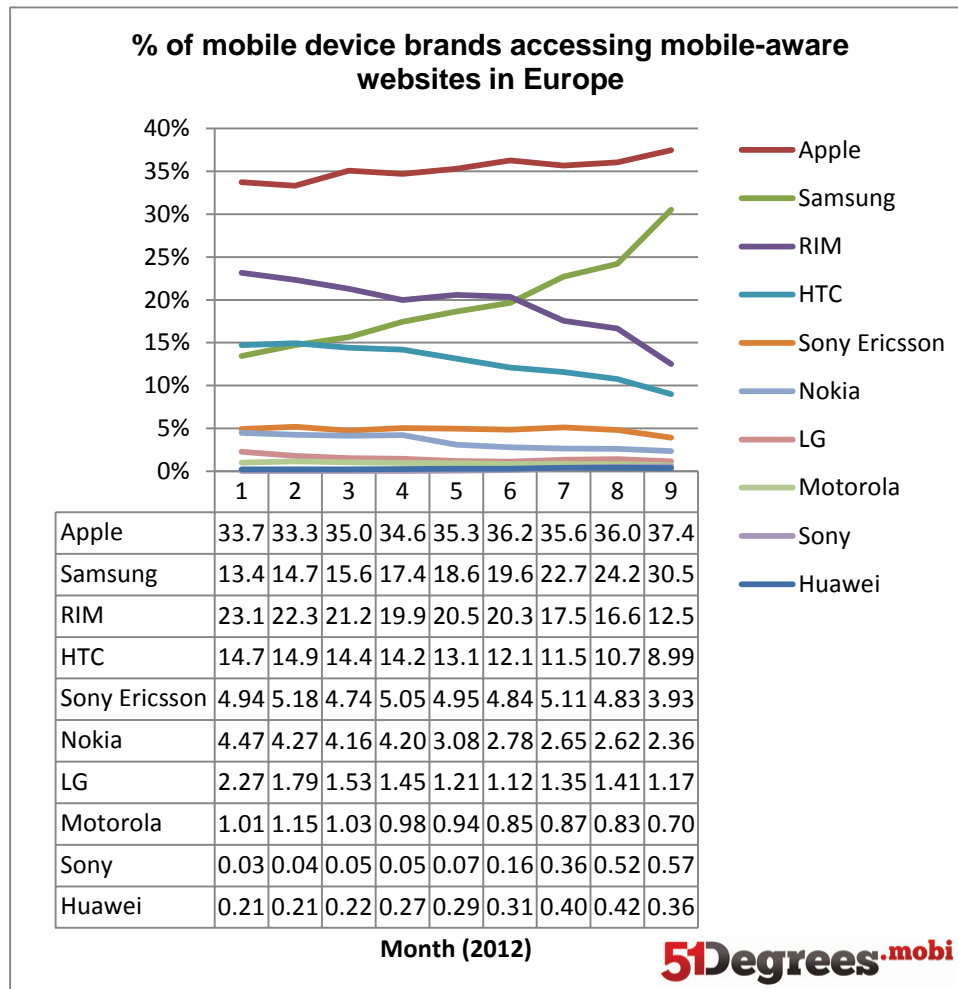


Blackberry remains a significant platform in other countries including Canada and South Africa.



Changing Hardware Brands

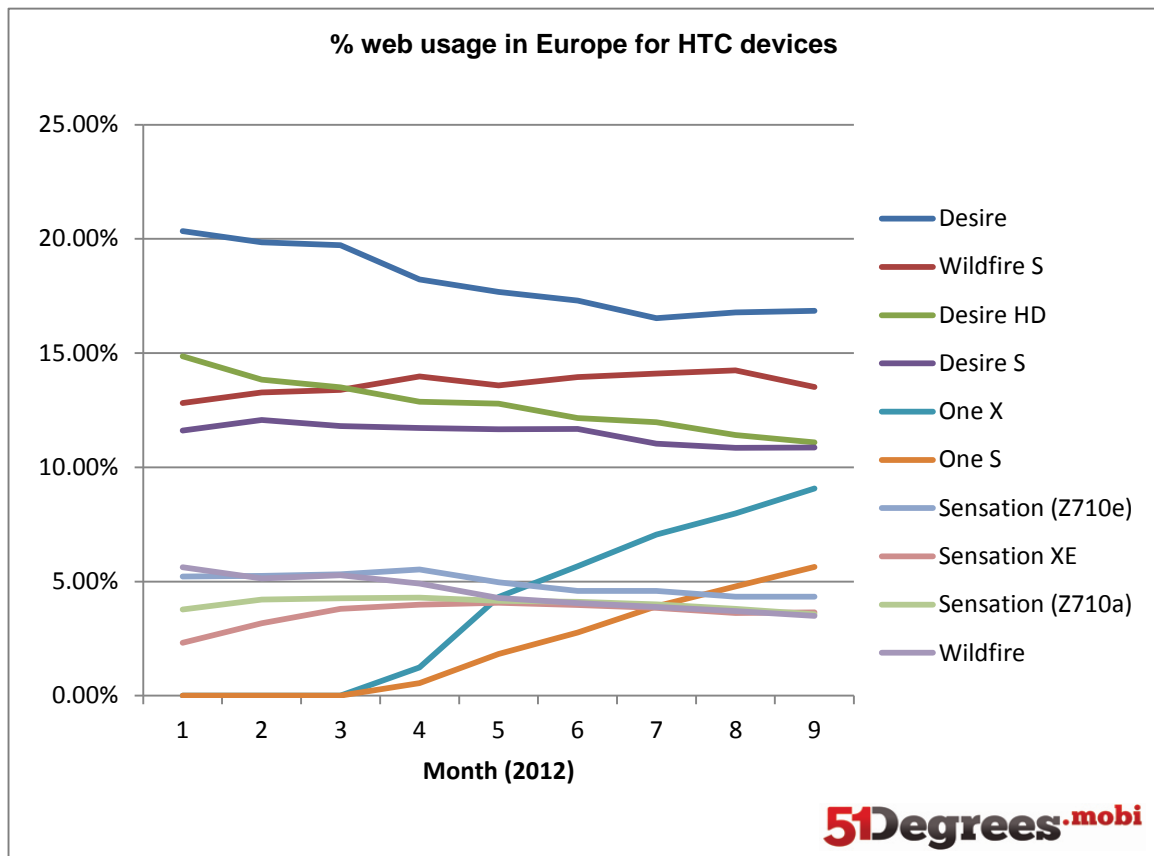
Considerable change has been observed in the first 9 months of 2012 within popular mobile device hardware brands (including smartphones and tablets) accessing mobile-aware websites globally.



HTC and Samsung both started 2012 with a similar share of mobile web browsing. The figures show HTC declining in its share of total web usage, whereas Samsung shows constant increase from 13% to 30% over the period. RIM experienced the largest drop in share of mobile web browsing. Sony (Ericsson) remains steady, whilst LG, Nokia and Motorola decline.

Active Devices - HTC

Drilling into HTC the One series, unveiled in February at Mobile World Congress 2012, has enjoyed significant growth whilst the much older Desire and Wildfire devices remain popular continuing to account for significant web activity from HTC devices.

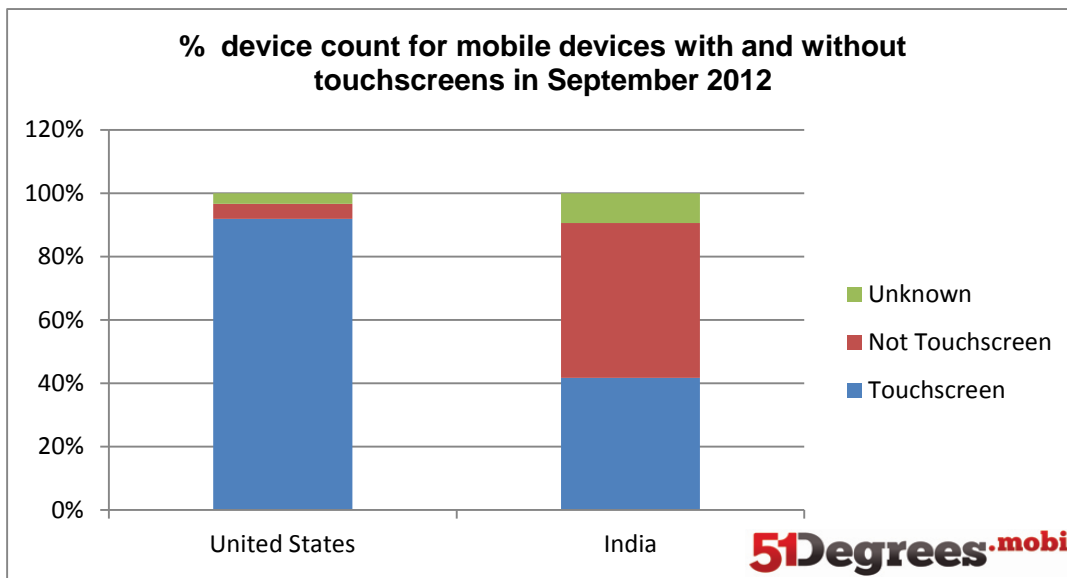


Other Brands - Learn More

All the information contained in this White Paper can be queried and manipulated on-line using the 51Degrees.mobi Mobile Analytics product. Use this [link](#) to start with a basic report for Samsung models in Germany.

Touchscreen

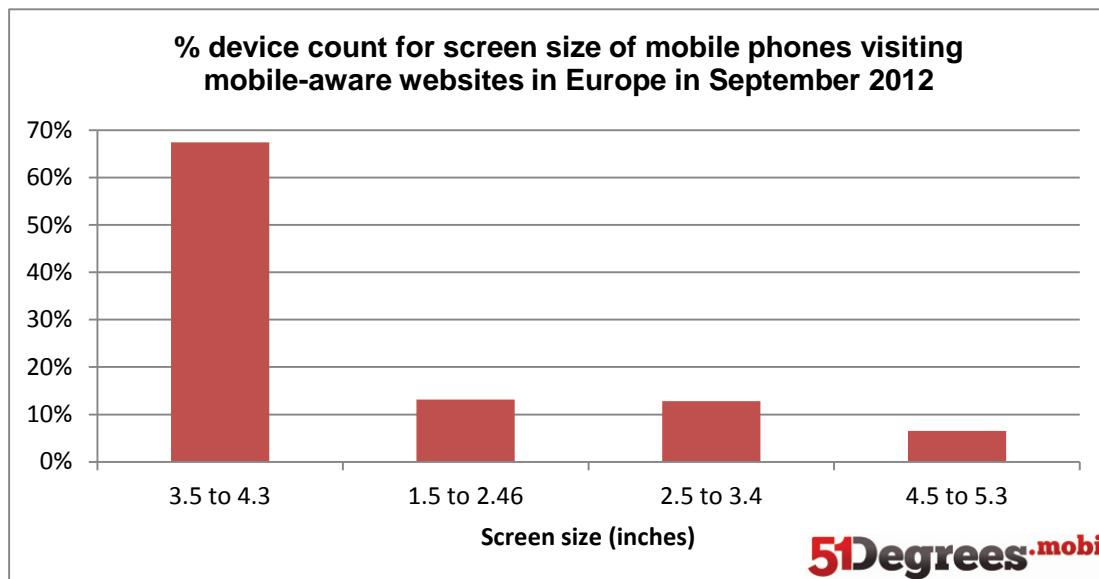
Touchscreen is now the main input method for mobile web access in the United States with a similar split for Europe. There is now greater penetration of touchscreens in developing countries. However in India nearly 60% of usage is from devices with joystick, trackball or numeric keypad input.



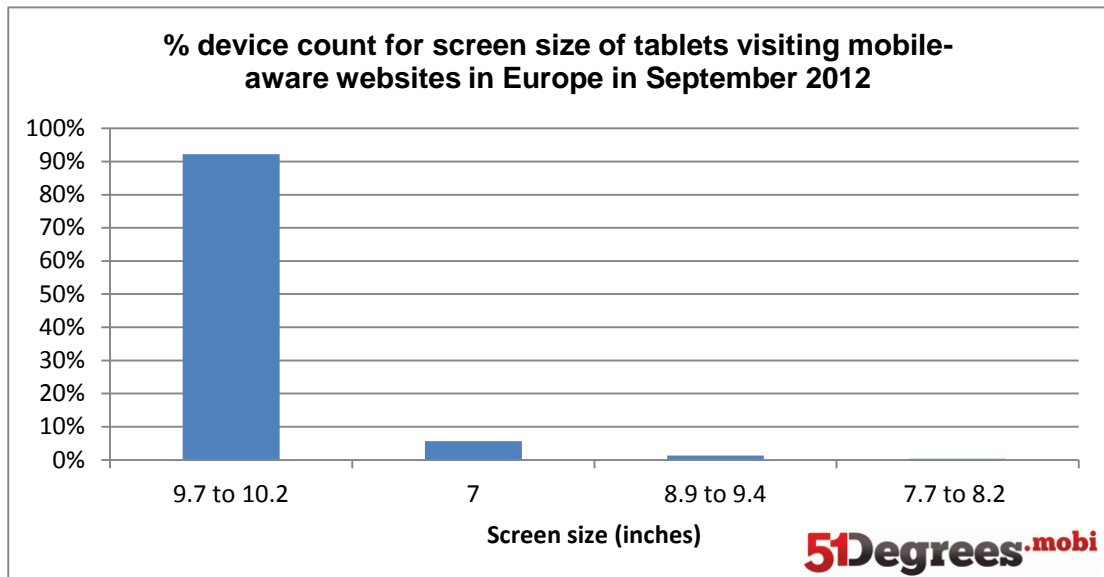
Screen Size

About 50% of mobile-aware web site visits are made by mobile devices with screen sizes between 3.5 and 4.3 inches, followed by 21% for devices with screen sizes between 9.7 to 10.2 inches.

Considering mobile phones alone (including smartphones and feature phones), 67% of the visits are made by mobile phones with screen sizes between 3.5 and 4.3 inches. Newer smartphones such as the Samsung Galaxy S3 with screen sizes between 4.5 to 5.3 inches account for only 6.5% of total usage.



Considering tablets alone, 92% of visits are made by tablets with screen size between 9.7 to 10.2 inches, followed by almost 6% by tablets with screen sizes of 7 inches, while tablets of other screen sizes account for very little activity.



Summary and Some Conclusions

Based on the figures revealed by Mobile Analytics and a deep knowledge of the mobile industry a few conclusions have been drawn by the authors.

Tablets are becoming increasingly significant. Europe and US-based mobile aware websites experienced most traffic from Apple iOS based devices primarily due to growth in tablets. As more Android and Windows based tablets are sold over the important Christmas trading period Apple's share of overall tablet activity seems likely to decline whilst remaining the leader during 2013.

Windows Phone has not generated much impact so far and Nokia's share of web visits is decreasing in many countries. However, with Microsoft about to spend a marketing fortune on their Windows 8 and Windows Phone 8 products, and the launch of the Microsoft branded "Surface" tablet we are expecting Windows Phone's share to increase in 2013. Nokia will need to move into the tablet market and ensure their phones are priced extremely competitively to increase their market share.

Blackberry is still popular in the UK, Canada and a few other countries therefore developers still need to consider Blackberry in these markets. Further Blackberry OS 10 is expected in Q1 2013 which importantly supports Android applications enabling the Blackberry AppStore to be filled quickly driving growth.

HTC is losing market share and Motorola is outshined by Apple and Samsung among others. HTC continues to lose market share despite rapid growth from the new One product range. Handsets released 2 years ago (Desire and Wildfire) continue to account for the majority of activity from HTC devices. HTC need a stronger marketing approach, and competitive pricing will be needed focusing on the One. Motorola's recent acquisition by Google is likely to provide a closer and strong product line from Motorola.

Touch and (roughly) 4 inch screens have become the de-facto input method in western countries. However touchscreen does not support 'hover' functionality essential to mouse driven user interfaces and font sizes generally need to be increased to be touchable. Therefore even when viewed on a tablet device many desktop designed web sites are hard to use.

How can 51Degrees.mobi Mobile Analytics Help You?

51Degrees.mobi mobile analytics product helps to visualize current trends regarding the use of internet by mobile devices. Moreover, it provides sufficient granularity of information related to mobile device vendors, mobile operating systems, and mobile device features to gain real insight

From the viewpoint of mobile web developers, mobile operators and mobile device marketing businesses, the information extracted from the analytics product helps to understand the changing dynamics of web browsing. The analytics product features easy navigation with clear descriptions of the analytics data and related fields enabling the users to easily perform their own analysis.

The data available in the product can be drilled down to provide visibility into adoption of mobile devices, mobile OS, and its features over time with regional variance. Uses include:

- Creating and maintaining a device strategy for a specific web site or business.
- Supporting a business case or new business proposal.
- Gaining insight into vendor's performance in advance of the publication of official sales and financial figures.
- Providing usage facts to journalists and bloggers to compare with other sources, such as sales figures or vendors published results.
- Mobile operators can compare usage information from their network against a wider dataset.
- Handset vendors can understand how their devices are used after initial sale.
- Research organisations can compare real web usage data to information provided via panels and other sources.

About the Authors

Aashish Adhikari (MSc. Tech) is a highly motivated individual with expertise in the field of mobile network measurements data and mobile analytics. Having worked in the area of network traffic measurements and analysis during his graduate studies, he is able to analyze big data and produce relevant results within planned time frame.

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Link to master's thesis: http://momie.comnet.aalto.fi/wp-uploads/Adhikari_Thesis_2012.pdf

James Rosewell - Prior to founding 51Degrees.mobi in 2009 James spent 10 years running major mobile programmes for Vodafone, plus founded and sold a mobile marketing business. He's passionate about delivering great user experiences cost effectively to all mobile devices. He also co-presents thefonecast.com, a concise weekly insider's podcast for the mobile industry.

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