



Mobile Web Trends 2011

A white paper from 51Degrees.mobi

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Introduction

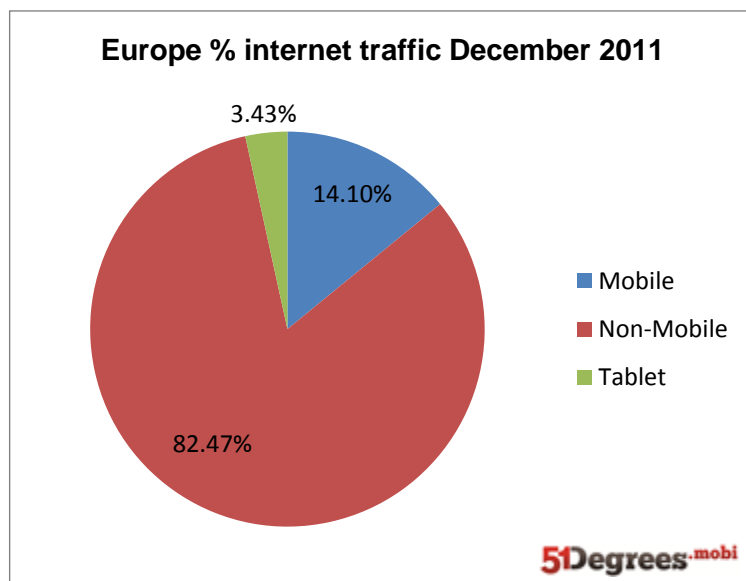
This white paper provides a unique insight into internet use on mobile devices. It's not based on device sales or shipment information. It doesn't rely on figures provided by a mobile network or internet service provider. Instead it's been created from real-world internet traffic seen by thousands upon thousands of web sites enhanced to detect mobile devices.

51Degrees.mobi receives information about millions of web site visits every day. We've analysed this data and have spotted five trends from the second half of 2011 that could redefine the way you think about web traffic in 2012.

The market

At the end of 2011, the International Telecommunication Union estimated there were almost 6 billion mobile subscriptions worldwide. That's equivalent to 86.7% of the world's population having one connection each. In comparison, there were just 1.16 billion fixed-line connections.

Our own analysis from December 2011 reveals that over 17% of visits to mobile-aware web sites in Europe and over 16% in the USA were from mobile phones and tablets. That's one out of every six visits!



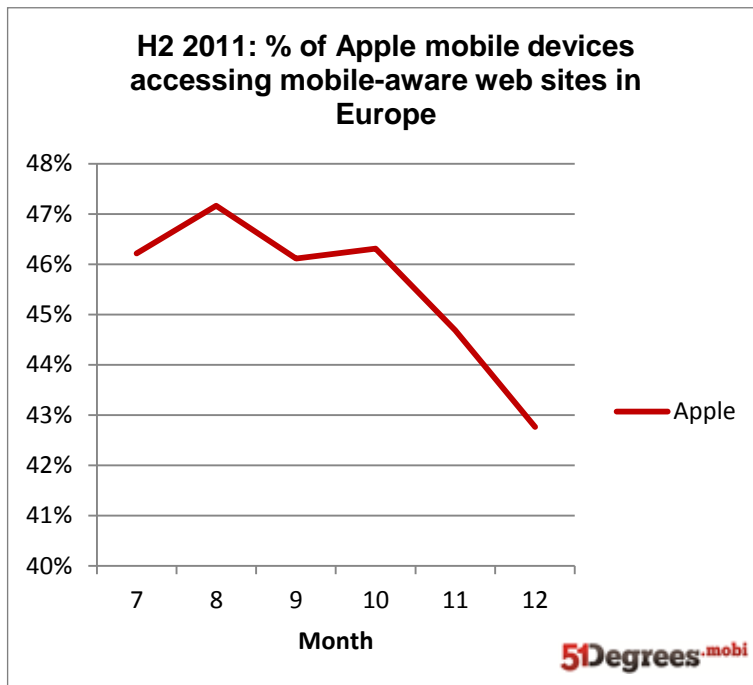
Trend 1: Apple’s dominance of the mobile web is declining

Overall in 2011, European and US-based mobile aware websites experienced most traffic from Apple iOS based devices.

However, the overall percentage of iOS devices declined.

The second half of 2011 saw the European iOS share drop to 42.6% in December.

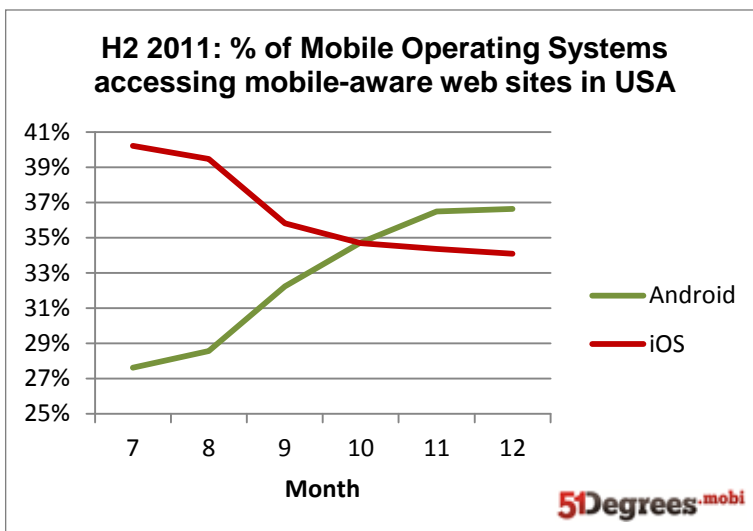
In the USA, its percentage fell to 34.1%, dropping below Android.



Trend 2: Android is growing

Android’s share of web visits in the USA has now overtaken Apple, ending the year with 36.6% of all mobile device visits.

Across Europe, Android visits increased from 19.5% to 25.5% in the last six months of 2011.

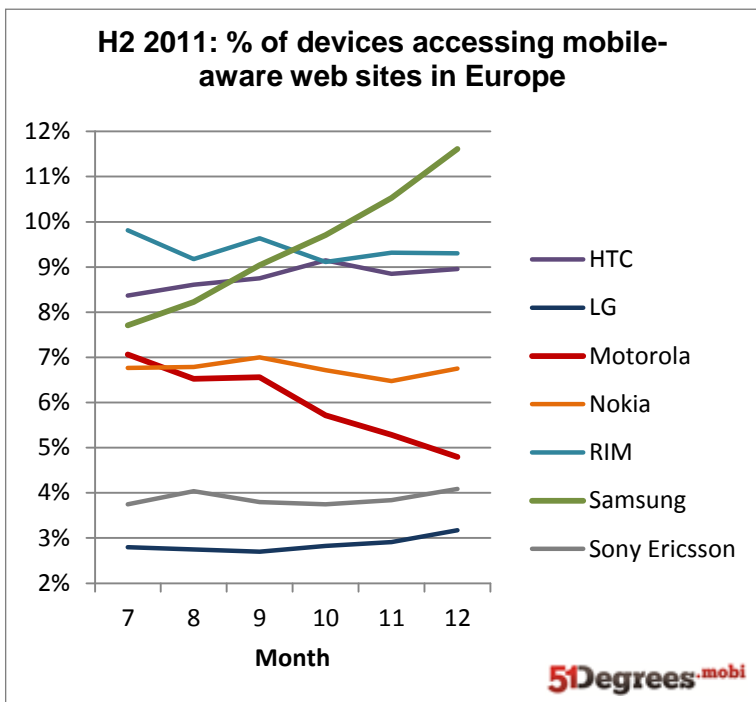


Trend 3: Some manufacturers' share of the mobile web has changed considerably

Although Samsung and Motorola started the second half of 2011 with a similar share of mobile web browsing, these figures saw considerable divergence over the next six months.

Samsung's share of mobile web visits increased from 7.7% to 11.6% in Europe during H2 2011. In the same period, Motorola's share fell from 7.1% to 4.8%.

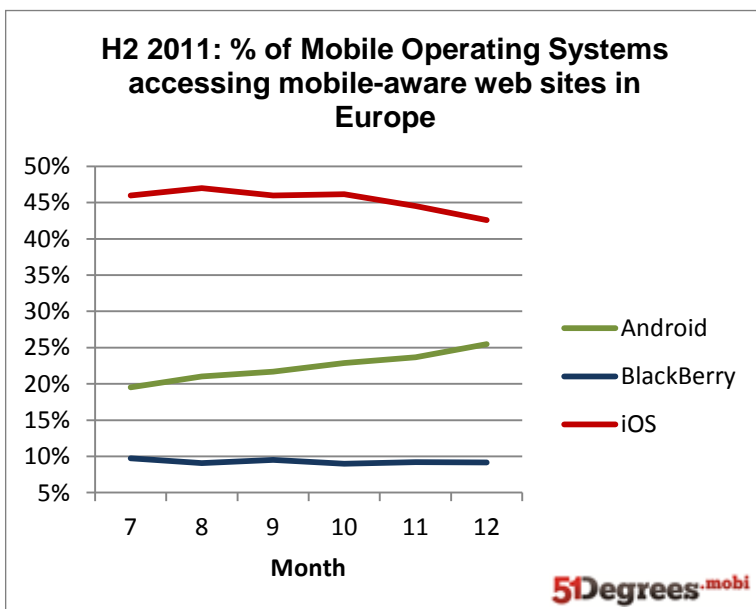
It's notable that Samsung reported its best-ever year for handset manufacturing in 2011, shipping more than 300 million mobile phones worldwide.



Trend 4: RIM is holding on

RIM's corporate structure and the reliability of its BlackBerry devices were both questioned in 2011, resulting in a volatile share price. Yet the company's proportion of mobile web browsing remained stable.

RIM's share of web browsing in Europe and the USA varied by only a fraction of a percent during H2 2011, accounting for around 9% of all mobile web traffic.

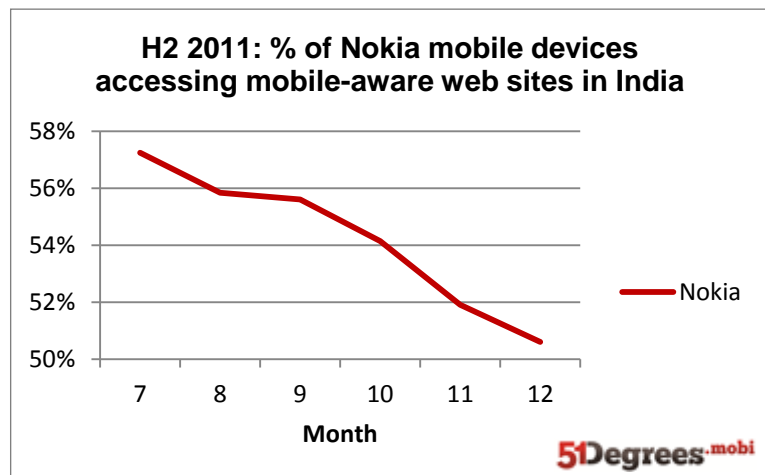


Trend 5: Nokia's dominance of the mobile web in India is declining

Unlike the mobile market in Europe and the USA, mobile phone use in India is still dominated by Nokia and its Symbian operating system. Although remaining strong, Nokia's share of mobile web use saw a decline in the second half of 2011.

Nokia mobile web visits fell in H2 2011 from 57.3% of the total figure to 50.6% by the end of the year. In the same period, Android saw a five-fold increase in its share of the Indian market to 6%.

Despite this Nokia remains a clear leader with no single manufacturer or OS threatening its mobile web leadership in India.



Conclusions

It's now well over a decade since the Nokia 9000 Communicator and the Nokia 7110 introduced the concept of the 'mobile internet' to many people. Yet with developed markets in the USA and Europe only approaching 50% smartphone saturation as we begin 2012, it's obvious the mobile internet is still a very fresh battleground.

During H2 2011 we analysed more than 550 million web site visits. Based on these figures, here are our predicted trends for 2012.

Android becomes the leader for mobile web traffic in Europe

The Apple iOS is no longer the dominant platform for mobile web browsing in the USA. If the current rate of iOS decline continues in Europe, Android will become the leading mobile browsing OS in this region by mid-2012.

Apple devices become increasingly app-driven

Apple's overall share of web traffic has fallen in the United States and in Europe. Given Apple's continuing sales successes with the iPhone and iPad, it seems Apple users may be becoming increasingly reliant on applications rather than the 'pure' mobile web.

Windows Phone will become a key player

Windows Phone hardly features in our figures from H2 2011. However, with Nokia launching European Windows Phone devices at the end of last year and the company's US-focussed devices due to arrive shortly, we're expecting the Microsoft mobile operating system to make a strong showing in our charts during 2012.

Nokia's Indian decline will slow

Brand loyalty to Nokia will be reinforced by new handsets in India. The introduction of low-cost Windows Phone smartphones, along with Nokia's mass-market Asha devices, is likely to slow the decline in share we tracked in H2 2011.

The one constant in all of this is the internet. Designing for the mobile web can offer an opportunity to bypass mobile OS dependences. Technologies such as HTML5 allow app-like behaviour without creating a different application for each operating system.

As a result, an investment in the mobile web rather than in diverse operating systems will allow web developers to cater for virtually every potential customer and device type. It means that organisations can be ready for new mobile operating systems, like Tizen OS, before they arrive.

The mobile internet is certainly a battleground. But it's a battleground in which mobile developers and web designers can all be winners.

Background

This analysis of mobile web traffic looks at the overall percentage of mobile phones, tablets and other devices that access websites around the world. The data has been provided by websites using 51Degrees.mobi device detection and web optimisation.

Some organisations choose to redirect mobile devices to a scaled-down version of their standard site, perhaps with smaller images and a simpler layout. Others may have created an entirely different 'mobile' site that focuses solely on a particular aspect of their business. Both options are included in this analysis because 51Degrees.mobi device detection and web optimisation can be used for either situation. Similarly, we have not discriminated against the user's network: connections may be over 2G, 3G, 4G or WiFi.

Europe, the USA and India were chosen for this research due to the high volume of mobile web visits recorded throughout 2011. In each case, the country or region refers to the location of the web site. France, Germany, Italy, Spain and the United Kingdom (the 'EU5') have been grouped together for the Europe metrics.

About 51Degrees.mobi

51Degrees.mobi provides a portfolio of technologies that extend an organisation's existing online skills and investment to work on mobile devices as well. It delivers cost-effective, risk-free device detection, web optimisation and mobile analytics solutions enabling developers to maximise the customer's experience of using a smaller screen. With over 25 years' management expertise in developing and managing mobile web services, 51Degrees.mobi is used by 10,000s of websites and supports over 140 million devices visits every month.

To learn more about 51Degrees.mobi mobile analytics or any of the company's other services, please contact info@51degrees.mobi or visit <http://51degrees.mobi/Products/MobileAnalytics>.