

On Mobile Web, Market Share Doesn't Matter

Mobile Web Up Report
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Summary

Mobile phone market share has little or no relation to the volume of mobile web browsing by consumers. People using phones with the highest market share spend relatively little time browsing the mobile web, while certain other phones with low market share account for the vast majority of mobile web browsing in the USA.



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Mobile Web Up, a leader in creating mobile websites for North American enterprises, today announced surprising research on how people use their phones to browse the web. A market analysis reveals that the market share of a phone has little relation with the amount of mobile website usage.

Some phones with a lower market share account for the bulk of mobile web browsing, by seeing more use among those consumers who own them. In contrast, some very widespread device classes see relatively little market share.

"Market analysts, commentators and pundits love to talk about the mobile web," says Mobile Web Up founder Aaron Maxwell. "Their opinions are often based on device market share data: hard measurements of product sales and consumer buying patterns. But for mobile web design, those are the wrong numbers to look at."

| Platform | Total Market Share (%) | Smartphone Market Share (%) | Mobile Web Usage (%) |
|-----------------------|------------------------|-----------------------------|----------------------|
| Symbian OS (Nokia) | 8.1 | * | 1.46 |
| iOS (iPhone) | 5.8 [1] | 24.2 | 25 [2] |
| RIM | 9.0 | 37.6 | 32.8 [3] |
| Android | 4.7 | 19.6 | 16.9 |
| Samsung (non-Android) | 23.4 [4] | * | 2.47 |
| webOS (Palm) | 1.1 | 4.6 | 1.33 |
| LG | 21.2 | * | < 1 |

(* indicates share is significantly below 5%.)

Mobile Web Up analysis based on public data from comScore, StatsCounter, QuantCast and GetJar.

A much better predictor is smartphone market share. In other words, only looking at smartphones, and pretending other phone types (such as messaging phones) do not exist.

But even that is imperfect. With the iPhone, the percentages for smartphone market share, and for its share of total mobile web use, are roughly equal. But that measure overestimates the actual web usage for Blackberry (RIM) and Android.

"For your own mobile web strategy, ask yourself what mobile platforms your market is using most to go online," advises Maxwell. "Look at actual consumer behavior, as measured by mobile web use. This will be different depending on your business."

For example, in mobile banking, Wells Fargo found the iPhone accounts for 30% of mobile access to their treasury services, with the majority (50%) coming from clients using BlackBerry smartphones.

Ideally you will be able to leverage statistics from your existing web services. You will also want to check your website on mobile phones.

About Mobile Web Up

Mobile Web Up is a leader in mobile web design services. Their specialty is "mobilizing" the existing websites of North American enterprises. In business since early 2009, Mobile Web Up's expertise has led to mentions in publications like Inc.com and Mashable, and outstanding results for their clients. Learn more now at www.mobilewebup.com, on your desktop, notebook or smartphone.

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Appendix: Methodology And Notes

Primary data sources:

- http://comscore.com/Press_Events/Press_Releases/2010/9/comScore_Reports_July_2010_U.S._Mobile_Subscriber_Market_Share/%28language%29/eng-US
- http://gs.statcounter.com/#mobile_os-US-monthly-201006-201008

Footnotes from chart:

[1] An estimated 234 million Americans have mobile phones; of those, an estimated 55.7 million have smartphones. From this ratio, the iPhone's smartphone market share of 24.2% is a total market share of 5.8%.

Source:

http://comscore.com/Press_Events/Press_Releases/2010/9/comScore_Reports_July_2010_U.S._Mobile_Subscriber_Market_Share/%28language%29/eng-US

[2] Total iPhone OS usage in July 2010 was reported as 37.99%. How much of this was on the iPhone, and how much on the iPod touch? Based on related Quantcast data, the phone accounts for about two thirds of iPhone and iPod touch mobile web browsing hits. This predicts about 25% iPhone usage total.

Source: <http://blog.quantcast.com/quantcast/2010/09/ios-vs-android.html>

[3] This proportion for Blackberry web usage is significantly higher than other marketing data sources suggest; a ratio of 3 to 1 for iPhone vs. Blackberry is more consistent - see this Quantcast study for example. Still, if Statscounter's numbers turn out to be overstating Blackberry web usage, it only strengthens the points in this article.

Source: <http://blog.quantcast.com/quantcast/2010/09/ios-vs-android.html>

[4] GetJar device statistics imply this number has risen to about .2% total for the two primary Samsung Android devices that had seen wide release in the USA as of mid-2010, the Behold II and Moment. This adjusts the comScore percentage for Samsung's market share from 23.6% down to 23.4.

Sources:

- http://devices.getjar.com/device/Samsung/SGH_T939_Behold_II
- http://devices.getjar.com/device/Samsung/SPH_M900_Moment