

by Andrea Vladar and Elizabeth Fife

The growth of mobile social networking in the US

How far, how fast?

This article explores patterns in the use of mobile social networking¹ services in the United States. Our data from the annual Wireless Mobile Data Services Study (WMDSS) suggests that social networking has become a growth area among all age groups in 2010. In addition, social networking is not necessarily a substitute means of communicating as mobile users that generally communicate the most – via talking, texting, emailing – are also the heaviest users of social networking services.

Frequent users of mobile social networking exhibit early adopter behaviour: they have higher use of other types of mobile services, including information-related and entertainment-related services, and they place a higher value on their cell phone than other groups. Finally, they have greater intensity in terms of expectations and interest in their mobile device and in services. Although intensive use of mobile social networking among young adults (18-24 year-olds) implies further potential growth, we argue that this activity will likely become less of a priority as users move onto new phases of life.

While there are thousands of applications available to US mobile phone owners today, social networking has grown dramatically due to its “fitness” with the qualities most valued with the mobile phone – it is communication-based, is a convenient complement to existing activity, and it maintains social relationships in an easy and efficient manner.

1 We define social network sites as “web-based services that allow individuals to (1) construct a public or semi-public profile within a bounded system, (2) articulate a list of other users with whom they share a connection, and (3) view and traverse their list of connections and those made by others within the system.” Boyd, D. M., & Ellison, N. B. (2007). Social network sites: Definition, history, and scholarship. *Journal of Computer-Mediated Communication*, 13(1), article 11.

Survey methodology

The following analysis is based on primary data about US customers from our annual survey project that measures the frequency and total usage of wireless data services as well as context-related information including where, when, and in what circumstances services are accessed.

This survey, the *Worldwide Mobile Data Services Study (WMDSS)* is an effort involving researchers at universities and research centres in multiple markets in Asia, the US and Europe. The goal of this consortia-based project is to generate reliable and unbiased longitudinal data about mobile phone users’ behavior, specifically in terms of data services.

In 2010, user data were collected in Australia, China, Germany, Greece, Egypt, Korea, Portugal, Taiwan, and the US. The data collection in the US occurred in early January 2010. A national random sample of 900 and a smartphone user sample of 1050 was collected online. The following analysis is based primarily on the smartphone sample.

Mobile social networking

The use of social networking websites has increased significantly in the past year and in fact our survey data show that it was the only area of growth in the category of communications services. The popularity of social networks such as *Facebook* in the PC environment has supported the migration of this activity to the mobile device.

Table 1 demonstrates that social networking is the fastest growing mobile content category for both application and browser access. It increased 240 percent to 14.5 million users in the past year.^{2,3} While popular Internet-based social networking

CATEGORY	TOTAL AUDIENCE (000)		
Application Access Category	Apr-2009	Apr-2010	% Change
Total Audience: 13+ yrs old	232,000	234,000	1
Used application (except native games)	54,414	69,639	28
Social Networking	4,270	14,518	240
News	4,148	9,292	124
Sports Information	3,598	7,672	113
Bank Accounts	2,340	4,974	113
Weather	8,557	18,063	111
Movie Information	3,296	6,359	93
Maps	8,708	16,773	93
Online Retail	1,416	2,701	91
Photo or Video Sharing Service	3,131	5,950	90
Search	5,434	10,315	90

Table 1

sites like *Facebook* and *MySpace* have developed mobile applications, social networks have also emerged that have no online equivalent. *Four-square* and *JuiceCaster* are two of many examples of mobile social networks that are based around specific activities. Other applications are centred around games and contests, location-based services (finding friends in the same location as the user), information and community-based services, user-generated content, and GPS-based services among others. It is not clear however, how the purely mobile-based services will create communities in the absence of a pc-based foundation to build from.

What explains the growth?

The growth in use of mobile social networking is likely due to a combination of elements:

Technology Drivers: improved interfaces, processing speeds of smartphones have made using this application simple and fast.

Compatibility with Existing Practices: Although users still carry out the majority of their social networking activities on their computers, the mobile environment has integrated effectively with the PC environment and complements existing broadband usage. The typical social networking

activity 'on the go' includes simply browsing pages, writing status updates and reacting to comments from friends. CTM interviews with users of the mobile Facebook app indicate that they look at Facebook pages and view their newsfeed when they have a few minutes to spare, but don't actively engage with the site. Another interviewee claims that they post photos when they are at an event like a concert or are on a trip so that their friends can see what they are doing.² Both of these uses are well-suited to the mobile phone's key qualities – on the go communications and info gathering. Generally, the more time-consuming activities such as IM-ing through the site, uploading pictures, posting comments on a friend's picture, and sending private messages are carried out online.

Value Proposition: The primary value according to our survey data year after year for using wireless data services is communication-related. Convenient communications, that is, staying in contact with people when and where it is desired and having alternative means of communicating, are all primary interests driving people's use of wireless data services.

Overall, communicating with friends and relatives is the #1 reason to use mobile data services.

² CTM personal interviews, June 15, 2010.

However, willingness to pay for this kind of activity has not yet really been put to the test. Currently, the mobile *Facebook* application is free, and some phones, such as the *Blackberry* have built-in chatting applications.

As of September 2009, 47% of online adults used a social networking website compared to 37% a year before¹. Age is a determining factor in usage: while three out of four young adults (18-29) are active users, this number decreases substantially in higher age groups. By contrast, only 40% of adults 30 and older visit social networking websites. In the mobile space the differences are similar. As shown in Figure 1 a much larger percentage of younger adults (18-24) are frequent users of mobile social networking services with usage decreasing with age. Smartphone ownership broadened in the past year; the highest growth was seen in the 25-49 age groups. As seen in Figure 1, however, all age groups increased their usage of mobile social networking.

Social networking is often referred to as an alternative way of communicating and connecting with other people. Our findings prove however, that the most frequent users of mobile social networking also communicate the most in other ways with their mobile phone. Figure 2 shows that those who use mobile social networking on a daily basis or more are also more active with texting,

emailing and mobile voice communication than less frequent users of social networking services.

Heavy users of social networking are more likely to be females, younger (Figure 3), African Americans or Hispanics and live in an urban or suburban areas. They are more frequent users of all kinds of other mobile data services –such as web browsing, information services and entertainment- and have a higher perceived value of their cell phone. All the above characteristics imply that avid social networkers are early adopters of technology.

Conclusion

The availability of thousands of applications in different app stores has not changed the fact that people still value and use communication-oriented services more than any other activity. This has remained true for all markets included in our study over time. The early adopter smartphone owners as well continued to favour communication services, but to a higher degree than standard phone owners. This group also uses mobile social networking more than other users. Rather than substituting for other forms of communication, social networking activity is an additional means of maintaining personal relationships. The early adopters with the heaviest use also communicate the most in other ways, including email, texting and voice. As smartphone owner-

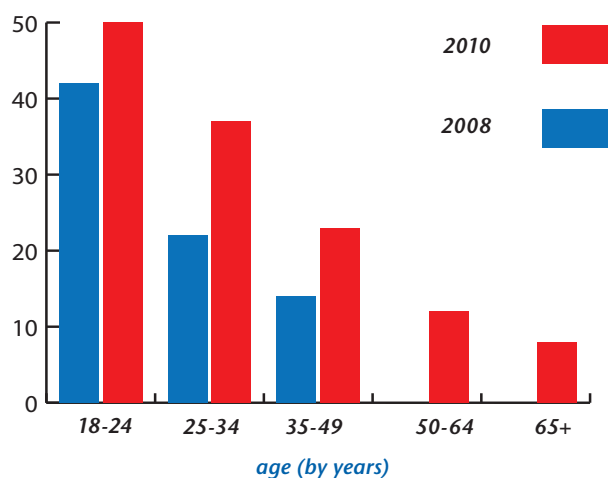


Figure 1: Frequent usage of social networking on a cell phone by age, source: WMDSS study, CTM, 2010, nationwide sample (% of users agreeing that they use this service daily or more often)

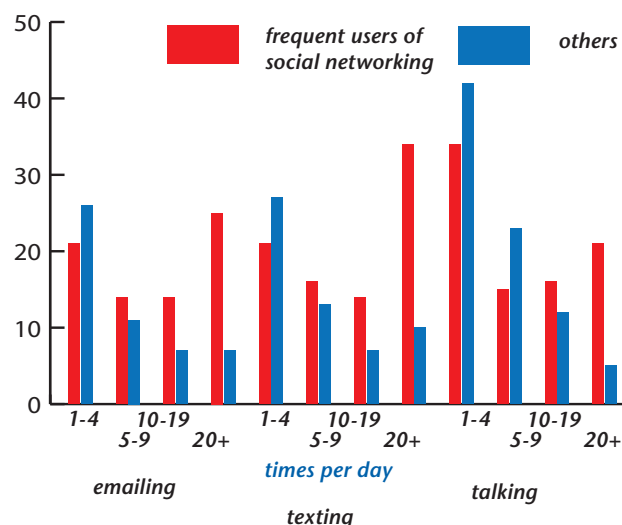


Figure 2: Frequency of communicating, frequency of mobile social networking usage breakdown, source: WMDSS study, CTM, 2010, smartphone sample (% of users that use the listed services)

ship has expanded beyond young tech-savvy customers to a wider demographic we see slightly decreasing use in terms of the frequency that people are accessing data services in 2010. That these groups with less active data consumption have not changed behaviour in the way that the early adopters did with generally higher degrees of engagement, suggests that social networking, likewise, may not grow in use beyond the younger demographics.

Nonetheless, social networking activity increased dramatically for all age groups in the past year as seen in Figure 1. Fast uptake of this service is a reflection of its attributes and "fitness" to the mobile platform: a) simplicity, b) clear value proposition, given that most users' main interest is maintaining personal contacts and remaining engaged c) it is communication-based, the principal activity of the mobile phone, and it represents d) continuation of an existing activity that is considered important.

Another indication that mobile social networking is an apt fit to the mobile device is the fact that usage for this particular service is spread much more widely over multiple locations and contexts compared to other services that are measured in the survey and tend to be confined to use in just a small number of places, i.e. home or in transit. Clearly this is an engaging and even addictive activity for some that can be quickly and frequently accessed through the mobile phone regardless of the user's location or situation.

Mobile social networking so far appears to be a promising service, at least in terms of usage, but whether it will be possible to further monetize this activity through advertising, targeted community-building, enhanced features, and attributes that are specific to the mobile phone such as GPS, is still an unknown. Likewise, whether the early adopters will continue their avid use of this service as they pass through new stages of life bears closer attention. For example, CTM's *Pick-A-Life* study which explores peoples' affinities for new technology, finds that once younger age groups enter the workforce, their use of technology changes and their perception of value fits the realities of their lifestyle and stage of life.

This is demonstrated by the fact that trends in consumer spending are stable across age groups over time. Nonetheless, this group will likely maintain an openness to using similar services they have experienced in the past. This familiarity

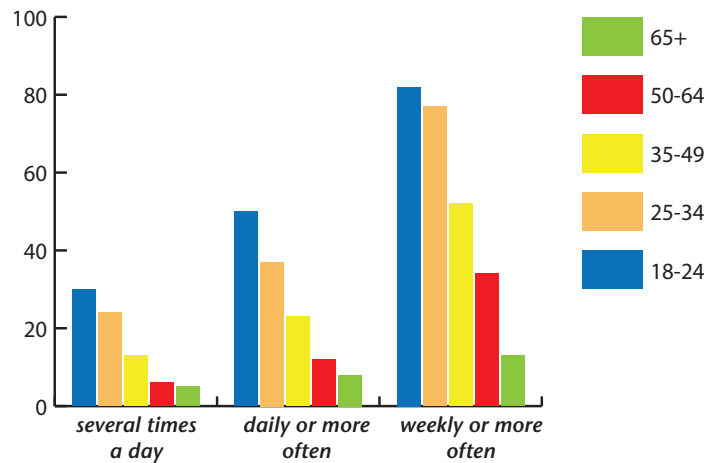


Figure 3: Frequent usage of wireless social networking, age breakdown, source: WMDSS study, CTM, 2010, smartphone sample (% of users agreeing that they use this service on a regular basis)

might support mobile social networking features for enterprise use that provide new ways of collaborating and communication as well as new relationships with partners and suppliers.³

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