



Determine The Impact of a new Generation of “Always Connected” Mobile Internet Users

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ABSTRACT

A new generation of “always connected” mobile Internet users that primarily access the Internet through mobile devices[1]. This generation of hyper-mobile, hyper-connected user has materialized across age groups, and across mature and emerging markets. Equipped with unprecedented computing power as a result of a world brimming with smarter smartphones, tablets, notebooks and other affordable Web-enabled mobile devices, and powered by better network coverage, faster broadband connections, Wi-Fi networks and the explosive growth of mobile apps, user demand for ubiquitous availability of Internet is only getting stronger. Little wonder then that there is so much excitement around every new version of smartphone or tablet released.

KEYWORDS: Mobile Internet users, Web user behaviour, digital consumer’s behaviour, Mobile Internet spawning

I. Introduction

A survey conducted by Accenture on Internet access through mobile devices confirms that mobile Internet usage continues to be on a sharp upward trajectory. Indeed, it has now reached the stage when market players across communications, media and technology should look forward to business opportunities and the operational efficiencies of a mass market. That is, if they are prepared for it.

The survey, conducted across 13 countries in Europe, Latin America and South Africa, brings to the fore five key trends in the digital consumer’s behaviour that have implications not only for players in telecommunications, media and technology, but also for those in other industries such as retail, utilities and automotives. A key finding of the survey is that a majority of Internet users connected to the Internet with a mobile device in the past one year, with smartphones emerging as the most popular mobile Internet access medium. In fact, activities or transactions on mobile Internet have become so much a part of daily life that those who don’t own a mobile Web-enabled device intend to buy one soon. A growing number of mobile Internet users are using their mobile devices to receive and send e-mails, connect on online communities or for instant messaging. The survey identifies usability and mobile apps as the primary drivers of mobile Internet use, with a higher proportion of users having downloaded programs and apps on their mobile devices in the past one year.

Usage Behavior

An average of 69 percent of Internet users connected to the Web with a mobile device in the past 12 months. Of these, 61 percent used smartphones for accessing the Internet. Among non mobile Internet users, 46 percent expressed interested in buying a Web-enabled mobile device in the future. This as an increasing number of innovative touch-screen models with great image resolution, faster Internet access and attractive built-in social media and mobile payment apps are hitting the market every day.

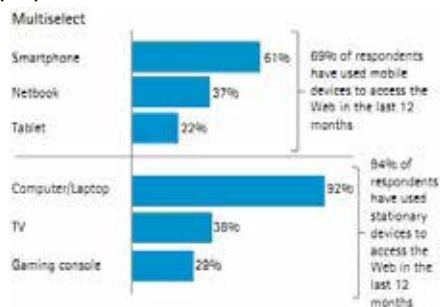


Fig.1 Mobile devices used in the past 12 months to access the Internet

Mobile devices used in the past 12 months to access the Internet[2]

An average of 60 percent of those who do not own a mobile phone or who do not access the Internet through their mobile phone have tried to use mobile Internet at least once; 45 percent said they were considering doing so in the near future.

Usage patterns show increasing use of smartphones for work-related activities

According to the research survey, 58 percent of the people accessing the Web on a smartphone did so for personal matters versus 20 percent for work-related activities. According to the survey, 58 percent of the people accessing the Web on a smartphone did so for personal matters versus 20 percent for work-related activities. The proportion of professional work done on other mobile devices such as tablets was higher than that on smartphones.

Gender differences in mobile Internet usage are blurring

The gender differences in the usage pattern continues to be the same as in previous Accenture surveys (which were limited to three countries—Austria, Switzerland and Germany) with more men (73 percent) than women (66 percent) using mobile Internet but there is evidence that the gap is narrowing. The differences have nearly disappeared with 59 percent of the men surveyed accessing the Web through mobile devices against 58 percent women compared with 37 percent and 17 percent, respectively in 2011[3].

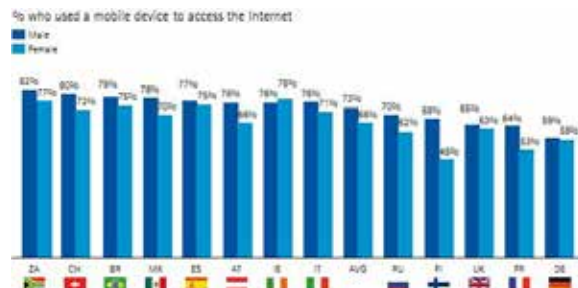


Fig.2 Men are still using mobile Internet more frequently than women (e-mails, apps, news, downloads).

Sending or receiving e-mails is still the most popular activity but others, such as online communities, blogging and banking, are catching up quickly

Sending or receiving e-mail is the most popular activity among mobile Internet users with 70% using their mobile device to receive and send e-mail

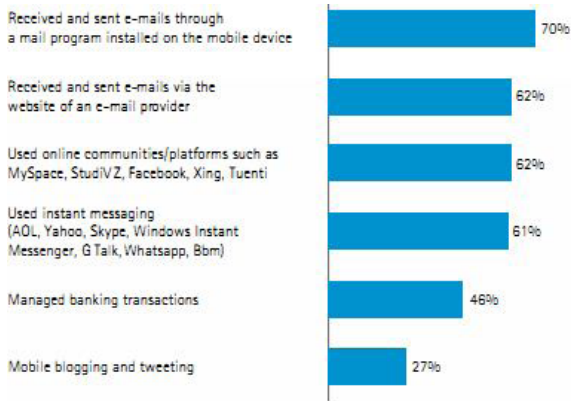


Fig 3. Activities carried out on mobile Internet devices

62% used their mobile device to access online communities

such as Facebook, 61% for instant messaging, while 27% used it for tweeting and blogging. Mobile banking growth is also evident with 46% using a mobile device to conduct a banking transaction.

Mobile apps accelerating mobile Internet use

The survey identifies mobile apps as one of the primary drivers of mobile Internet use. As a gateway to the Internet, mobile apps are extremely convenient. Not surprisingly, the survey confirms that a higher proportion of those aged 14-29 years downloaded apps (76 percent in the 15-19 age group and 80 percent in the 20-29 age bracket) and music (71 percent in the 15-19 age group and 61 percent in the 20-29 age bracket).

Which of the following types of programs or apps have you downloaded from the Internet on your smartphone/tablet/netbook?

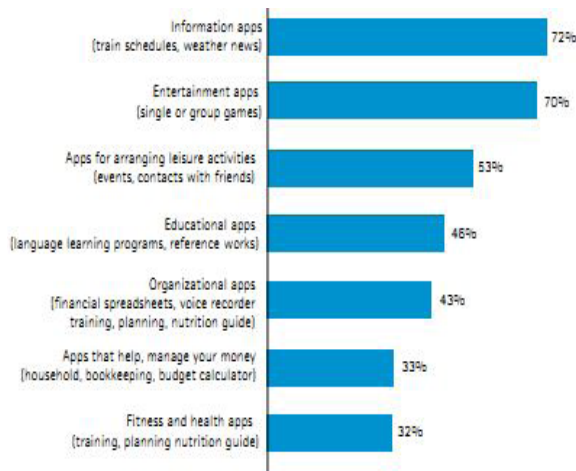


Fig 4.1. Mobile apps accelerating mobile Internet use

| | Smartphone | Tablet | Netbook |
|--|------------|--------|---------|
| | 73% | 66% | 76% |
| | 72% | 61% | 72% |
| | 52% | 54% | 54% |
| | 42% | 57% | 51% |
| | 41% | 50% | 49% |
| | 30% | 39% | 38% |
| | 32% | 33% | 33% |

Fig 4.2. Mobile apps accelerating mobile Internet use

Challenges

Data concerns persist, especially over cloud services

The consumer also wants a secure environment—70 percent of the mobile Internet users surveyed had concerns about the security of their data. These concerns ranged from losing personal data, hacking of personal data to viruses harming mobile devices in the case of 80 percent of those using or considering the use of cloud services.

Network quality is critical—consumers are looking for ubiquitous coverage

Consumers want ubiquitous coverage—a network that follows them everywhere and provides compelling usage experience anywhere.

The importance of all these criteria (which more than half of the respondents find crucial to their decision on network selection) implies that network providers will need to pay special attention to two basic things: constantly upgrading their network and offering innovative subscription packages. Significant investments in upgrading network quality and coverage would indeed be a critical driver in driving mobile Internet usage.

Cost of mobile Internet access perceived to be higher than expected

While the subscriber's primary criterion in selecting a service provider is the quality of network, the cost of data connection falls just outside the top three network selection criteria, possibly because such costs have stabilized

Ad banners and advertising through texting considered to be annoying

Additionally, companies across the communications, media and technology value chain will need to take note of a finding that reiterates the annoyance factor associated with online advertising. About 38 percent of the respondents considered add banners as annoying and while just as many found advertising through texting irritating. However, 66 percent were favorable to information on coupons and promotions—with 46 percent viewing it as informative and 20 percent as amusing. This again brings to light the growing challenge for advertising and marketing companies to develop innovative ways to reach out to their target audience. Service providers and content developers will need to explore opportunities to collaborate with marketing and advertising companies to overcome this barrier.

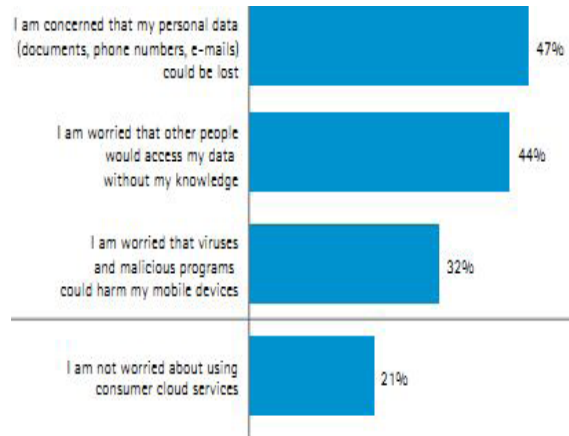


Fig 5 . Main concerns you have about consumer cloud services

Conclusion

- A majority of Internet users connected to the Internet with a mobile device in the past one year, with smartphones emerging as the most popular mobile Internet access medium.
- A growing number of mobile Internet users are using their mobile devices to receive and send e-mails, connect on online communities or for instant messaging.
- The survey identifies usability and mobile apps as the primary drivers of mobile Internet use, with a higher proportion of users having downloaded programs and apps on their mobile devices in the past one year.
- Consumers are now more willing than ever before to pay for pre-

mium services. The survey also identifies mobile payments as a significant growth avenue with growing use and awareness of these services.

A key driver of mobile Internet usage has been significant improvements in network quality and coverage over the years—the user's primary criterion in selecting a service provider. The survey highlights how consumers are increasingly looking for superior Internet experience on their mobile devices, similar to what they are used to on their computer or television.

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