netbiscuits

Enabling the mobile experience.

The Mobile Web Device Report

How Mobile Device Usage for Internet Access varies by Market, Industry, and Time

Table of contents

1 INTRODUCTION

Which devices really matter for your mobile Web strategy? This report will shed some light on current device usage trends on the mobile Web. Netbiscuits, the world's leading development and publishing platform for mobile Web sites and apps, has opened its logs from 2009 to early 2010 to provide statistical data about various industry verticals and markets around the world.

The following report represents segmented statistics from the 2.5+ billion mobile page requests that the Netbiscuits.com SaaS platform serves each month.

2 METHODOLOGY

All data presented in this report was generated exclusively from Web-enabled mobile devices that requested mobile Web sites delivered by Netbiscuits. Requests generated by bots, desktop browsers or mobile device emulators have not been included.

All data has been made anonymous so that the actual Web service and its provider cannot be identified. Monthly time frames always refer to an entire month, i.e. February first through the twenty-eighth, November first through the thirty-first, etc.

The statistics presented in this report may contain inconsistent naming over time for single devices. These inconsistencies result from the constant update of Netbiscuits device detection data base. Around 50 new device profiles are added to this proprietary data base on a monthly basis.

To break down the total number of unique mobile devices with regards to their relevance for mobile Web access this report uses a 50:50 percental split to separate the device "short tail", which refers to those devices that are predominately used for mobile Web access in a given case, from the "long tail" of all the other mobile devices that are also used for this purpose in that case.

3 About Netbiscuits

Netbiscuits operates the world's leading B2B Web software platform for the creation, operation and monetization of mobile Web sites and apps. It serves the mobile Internet programs for premium brands and publishers, global online, media and entertainment companies and leading retailers, agencies and advertisers. Globally Netbiscuits delivers more than 2.5 billion mobile page impressions each month. Founded in 2000, the company has 80 employees in the USA, Germany, UK and Singapore.

The award winning Netbiscuits platform is available as a cloud-based software service (SaaS). At www.netbiscuits.com all tools, interfaces and mobile enabling technologies are provided to develop, publish, monitor, and monetize professional mobile Web applications. Enabling browser-based mobile Web sites as well as hybrid apps for all mayor app stores and platforms, Netbiscuits allows customers to implement a 360 degree mobile strategy and achieve a faster path to profit from their mobile Internet programs.

Netbiscuits dramatically speeds up mobile Web site and app development. By providing the world's most advanced development platform to deliver rich end-user experiences to all mobile devices, Netbiscuits enables Web content and services to be created and delivered easily and efficiently worldwide. Our technology allows our customers to exploit the rich Internet capabilities of high-end mobile phones like Apple, Android or BlackBerry devices, and also guarantees optimized delivery to the less expensive but highly popular Web-enabled mass market feature phones as well.

To help our customers cover also the App side of the mobile Web universe, Netbiscuits created Hybrid Apps. Hybrid Apps integrate content processed by a mobile Web site into a platform specific client application. Netbiscuits Hybrid Apps are compliant with all requirements of the respective app platform and allow our customers to deliver their content and services into both directions in the fastest and most cost-efficient way. Hybrid Apps are available for all major app platforms, including Apple, Android, and Windows.

For in-house development Netbiscuits provides an integrated development environment comprised of APIs for mobile device management, content trans-coding, and the device-specific delivery of mobile applications. Our mobile serving technology dramatically improves the end-user experience of mobile Web applications and overcomes mobile hard- and software fragmentation. Being a multi-platform publishing solution, Netbiscuits enables its customers to publish any content to the diversity of Web-enabled devices, including gaming consoles, music players, e-readers, tablet computers, TV sets and – of course – smart and feature phones.

In October 2009 Netbiscuits won the internationally accepted ME Award for the „Best Mobile Publishing Platform“, Deloitte added Netbiscuits to the German Technology Fast 50, a list of the fastest growing tech companies, and Gartner rated Netbiscuits to soon become one of challengers among the major providers of mobile consumer application platforms worldwide.

4 NETBISCUITS GLOBAL DEVICE STATISTICS

Netbiscuits stores the profiles of 6,000+ different Web-enabled mobile devices from all over the world in its proprietary device detection database. This detection database allows us to optimize and deliver mobile Web sites to virtually any Web-enabled mobile device on this planet. Netbiscuits currently delivers over 2.5 billion page impressions to approximately 3,000 unique devices per month.

4.1 GLOBAL MOBILE DEVICE BREAKDOWN

Between February 2009 and February 2010 Netbiscuits handled page requests from between 2,500 and 3,000 unique devices per month, globally. In this period the number of unique devices that accounted for the first 50% of all site requests ranged between 11 and 18 while the number of those devices that accounted for the second 50% of all requests ranged between 1,721 and 2,912 unique Web-enabled mobile devices.

	Feb. 09	May 09	Aug. 09	Nov. 09	Feb. 10
Devices	1,736	1,961	2,225	2,930	2,508
Short Tail	15	11	11	18	12
Long Tail	1,721	1,950	2,214	2,912	2,496

Global Mobile Device Breakdown, Netbiscuits, Feb. 2009 – Feb. 2010 (© Netbiscuits, 2010)

This breakdown shows that by far the largest number of devices that are requesting mobile Web sites rest within the *long tail* of all Web-enabled mobile devices. Optimizing mobile Web sites only for the few devices that dominate a market means intentionally locking out the vast majority of all Web-enabled handsets and their users from your content and services.

4.2 Global Top 10 Devices

Among the global top 10 devices accessing mobile Web sites based on Netbiscuits the iPhone stood up for the pole position all time between February 2009 and February 2010. During the same time Apple's iPod Touch constantly took position two or three – a non-carrier device that has no voice capabilities and relies (like the iPhone) on a touch-based user interface that differs widely from the classical PC Web UI.

Apart from Apple devices, BlackBerry and Android handsets increased their quota of mobile Web site requests constantly between February 2009 and February 2010 while Nokia lost ground during the same period of time and disappeared completely from Netbiscuits' global top 10 devices listing in November 2009. In February 2010 Nokia was back and placed its 5800 XpressMusic on position five, now competing not only with Apple, BlackBerry and Android but also with new devices by Palm and Motorola that were explicitly optimized for mobile Web access.

	Feb. 09	May 09	Aug. 09	Nov. 09	Feb. 10
1	Apple/iPhone 3G	Apple/iPhone 3G	Apple/iPhone 3G	Apple/ iPhone; 3G; 3GS (Firmware 2.2-3.1)	Apple/ iPhone; 3G; 3GS (Firmware 2.2-3.1)
2	Apple/iPod Touch	Blackberry/8330 (Curve)	Blackberry/8330 (Curve)	Apple/iPhone 3G	Apple/iPod Touch (Firmware 2.2-2.2.1)
3	Nokia/N95	Apple/iPod Touch	Apple/iPod Touch	Blackberry/8330 (Curve)	Blackberry/8330 (Curve)
4	Nokia/E71	Blackberry/8310 (Curve)	Blackberry/9000 (Bold)	Apple/iPod Touch (Firmware 2.2-2.2.1)	Google Android/ Android Phone
5	Nokia/N95 8GB	Blackberry/8130 (Pearl)	Nokia/E71	Apple/iPod Touch	Nokia/5800 (XpressMusic, 5802)
6	Blackberry/9000 (Bold)	Blackberry/9000 (Bold)	Blackberry/8310 (Curve)	Blackberry/9000 (Bold)	Blackberry/9000 (Bold)
7	Nokia/E51	Nokia/E71	Blackberry/9500 (Storm, Thunder)	Blackberry/8310 (Curve)	Blackberry/9500 (9530, Storm, Thunder)
8	Blackberry/8310 (Curve)	Blackberry/9500 (Storm, Thunder)	T-Mobile/G1 (Android)	T-Mobile/G1 (Android, HTC Dream)	Motorola/A855 (Droid, Sholes, Milestone)
9	T-Mobile/G1 (Android)	Microsoft/PocketPC	Microsoft/PocketPC	T-Mobile/G1 (Android)	T-Mobile/G1 (HTC Dream)
10	Microsoft/PocketPC	Blackberry/8830	Apple/iPhone	Blackberry/8900 (Curve)	Palm/Pre (P101EWW, Russell)

Global Top 10 Devices, Netbiscuits, Feb. 2009 – Feb. 2010 (© Netbiscuits, 2010)

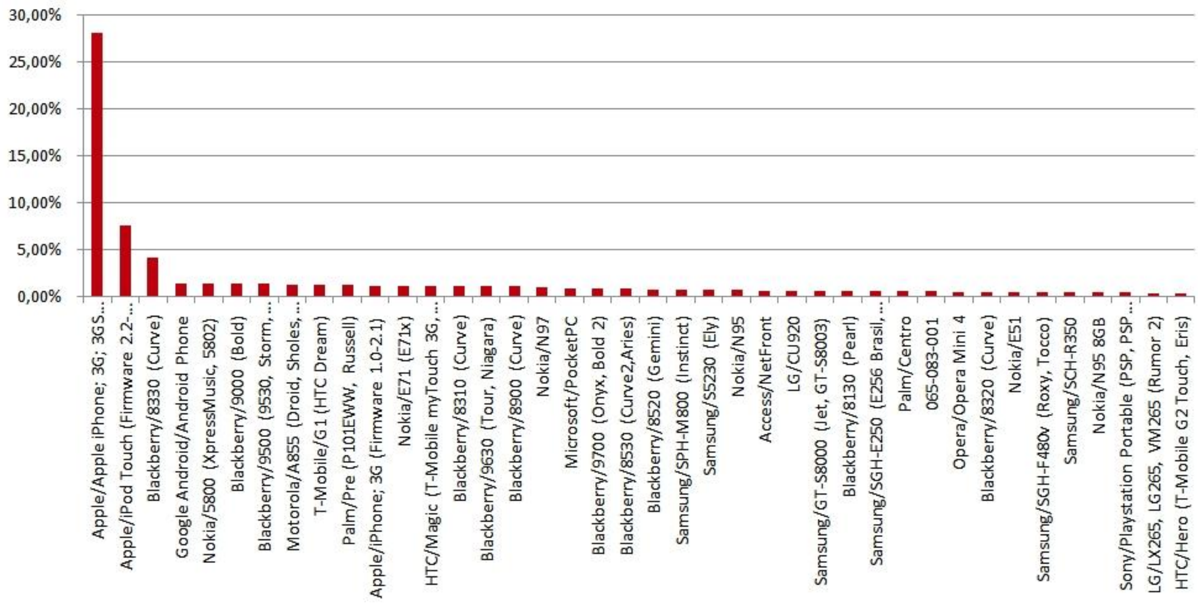
It is important to understand that Netbiscuits' global top 10 don't necessarily reflect general market trends as it is mainly driven by Netbiscuits' sucessful business development in certain markets.

4.3 GLOBAL DEVICE LONG TAIL

In February 2010 Netbiscuits recorded mobile Web site requests coming from 2,508 unique mobile devices worldwide. The graph below shows the traffic share of the top 40 devices in that month.

The first 12 devices along this graph accounted for 50.94% of all traffic on Netbiscuits. But only three of them had a remarkable share: iPhone 3G/3GS (28.03%), iPod Touch (7.53%) and BlackBerry 8330 (4.13%). Devices four to 16 had a traffic quota between 1.36% and 1.00%. Each of the other 2,492 devices that requested mobile Web pages via Netbiscuits in February 2010 only had a quota lower than 1.00%.

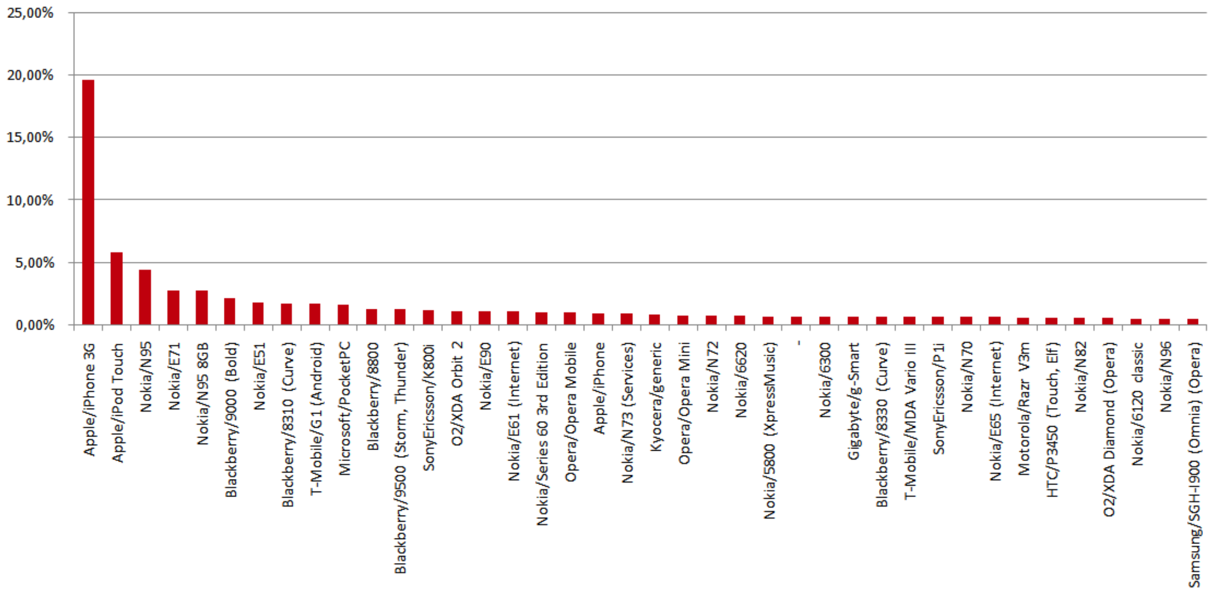
While the top three devices generated 39.69% of all mobile site requests the remaining 2,505 devices generated 60.31% of all traffic transfered by Netbiscuits in February 2010.



Global Top 40 Devices, Netbiscuits, February 2010 (© Netbiscuits, 2010)

One year before, in February 2009, the graph that shows the traffic share of the average top 40 devices looked different. Again, iPhone and iPod Touch lead the field, but both of them did not generate that amount of site requests that they achieved one year later. In February 2009 the iPhone "only" accounted for 19.60% and the iPod Touch generated "just" 5.77% of all mobile site requests on Netbiscuits.

Including iPhone and iPod Touch the number of devices that achieved a quota above or equal to 1.00% was 17 with seven of them manufactured by Nokia and four by BlackBerry. Together these 17 devices accounted for 52.14% of the overall requests. The other 1,719 devices, all with a share lower than 1%, generated 47.86% of all site requests.



Average Top 40 Devices, Netbiscuits, February 2009 (© Netbiscuits, 2010)

Today it is certainly not surprising that Apple provides very important devices for mobile Web access. But iPhone, iPod Touch, and now the iPad are not the only devices that matter in this realm.

Netbiscuits overall devices stats show that hundreds and thousands of other mobile devices from many different manufacturers are used for accessing the Web. Together these devices accounted for the major share of all mobile Web site requests via Netbiscuits between February 2009 and February 2010.

5 Device Breakdown by Market

The impact of any device on traffic statistics varies by region. Similarly, the destination site's industry vertical and the prospect customers of the service play an important role when it comes to the question which devices generate the biggest amount of page requests. Netbiscuits global device statistics should therefore not be confused with the metrics that a *specific* mobile Web site generates in a *specific* market.

USA	
Unique Device	1,689
Short Tail (57.27%)	2
Long Tail (42.73%)	1,687
Top 10 Vendors/Devices	**Share**
Apple/iPhone; 3G; 3GS (Firmware 2.2-3.0)	45.43%
Apple/iPod Touch (Firmware 2.2-2.2.1)	11.80%
T-Mobile/DASH	4.81%
Blackberry/8330 (Curve)	4.24%
Blackberry/9500 (9530, Storm, Thunder)	2.14%
T-Mobile/G1 (Android)	2.12%
Blackberry/9630 (Tour)	1.54%
Misc/Other Browser	1.48%
Blackberry/9000 (Bold)	0.96%
Samsung/SPH-M800 (Instinct)	0.90%

UK	
Unique Devices	1,220
Short Tail (51.37%)	9
Long Tail (48.63%)	1,211
Top 10 Vendors/Devices	**Share**
Apple/iPhone; 3G; 3GS (Firmware 2.2-3.0)	23.17%
Apple/iPod Touch (Firmware 2.2-2.2.1)	10.02%
Nokia/5800 (XpressMusic)	3.45%
Nokia/E51	3.39%
Blackberry/8900 (Curve)	3.09%
Samsung/SGH-F480v (Roxy, Tocco)	2.24%
Nokia/E71 (E71x)	2.06%
Nokia/N97	2.00%
Blackberry/8520 (Gemini)	1.95%
Blackberry/9000 (Bold)	1.69%

Germany	
Unique Devices	954
Short Tail (52.99%)	2
Long Tail (47.01%)	952
Top 10 Vendors/Devices	**Share**
Apple/iPhone; 3G; 3GS (Firmware 2.2-3.0)	28.64%
Nokia/6610i	24.35%
Apple/iPod Touch (Firmware 2.2-2.2.1)	7.08%
Nokia/5800 (XpressMusic)	2.47%
Nokia/N97	2.04%
Nokia/N95	1.51%
HTC/Magic (Pioneer)	1.44%
Samsung/SGH-F480v (Roxy, Tocco)	1.31%
Nokia/E71 (E71x)	1.00%
Samsung/GT-S8000 (Jet)	1.00%

Australia	
Unique Devices	807
Short Tail (53.07%)	4
Long Tail (46.93%)	803
Top 10 Vendors/Devices	**Share**
Apple/iPhone; 3G; 3GS (Firmware 2.2-3.0)	36.76%
Apple/iPod Touch (Firmware 2.2-2.2.1)	8.60%
Nokia/N97	3.98%
Blackberry/9000 (Bold)	3.73%
Nokia/E71 (E71x)	3.39%
Nokia/E63	2.28%
Nokia/N95	2.24%
Nokia/N95 8GB	2.20%
Samsung/SGH-F480v (Roxy, Tocco)	1.94%
Motorola/Q700 (Sidekick Slide)	1.62%

Device Breakdown by Market, International Case, January 2009 (© Netbiscuits, 2010)

The tables above shed a light on the device usage with regards to a specific mobile service that is live on the Web in four different markets – the USA, UK, Germany and Australia. All data refer to January 2010.

It is evident at first sight that the total number of unique devices that were accessing the mobile service in each of the four markets differed widely. The USA showed the widest distribution of devices (1,689), followed by UK (1,220) while Germany (954) and Australia (807) showed significantly lower numbers of unique devices. Generally Netbiscuits statistics show that the number of mobile devices used for accessing the Web grows over time in any market and for any service that is marketing its mobile Web offerings successfully.

With regards to specific devices it is obvious that Apple took a great chunk again. But Apple's quota differed significantly between the four markets. While in the US iPhone and iPod Touch accounted for a stunning 57.23% of all traffic, the two devices represented "only" 31.19% in UK and 35.72% in Germany. In Australia Apple did better and transfered 45.36% of all mobile Web site requests for this specific service in January 2010.

Down the top 10 list of devices we find significant differences for each market. In the US the services was predominately accessed via Apple and BlackBerry devices. Only one Windows Mobile, one Android and one Samsung device added into the mix.

In UK Nokia was still the strongest follower of Apple with four devices in the top 10 for January 2010. BlackBerry was also quite popular and again one device from Samsung made it into the top 10.

In Germany Nokia even displaced the iPod Touch from position two and came remarkably close to the iPhone's share. With five devices among the top 10 and a traffic quota that accounted for 31.37% Nokia devices were almost equally important as Apple devices in January 2010. BlackBerry devices did not show up in the German top 10 at all.

In Australia Nokia also placed five devices within the top 10. But compared to Apple their combined traffic share was much lower. BlackBerry, Samsung and Motorola added one device each to the Australian top 10 of the discussed service in January 2010.

Again, in all four markets several hundreds of other devices besides the top 10 generated a huge amount of traffic. To get a clue about which mobile devices are used for accessing a mobile service in a certain market, metrics from all devices in the market are required on a daily basis.

6 Device Breakdown over Time

The impact of any device changes over time as new devices are constantly introduced to the market. Throughout the last three years the iPhone inspired a whole new class of devices that are primarily optimized for accessing the Web. A growing number of these devices are successfully gaining ground against Apple's iconic handset. So it should be clear that any device statistic presented here is a snap shot taken from a process of constant change.

6.1 USA, Search & Information Industry

May 2009	
Unique Devices	1,052
Short Tail (53.35%)	5
Long Tail (46.65%)	1,047
Top 10 Vendors/Devices	**Share**
Blackberry/8330 (Curve)	20.40%
Apple/iPhone 3G (Firmware 1.0-2.1)	17.39%
Blackberry/8130 (Pearl)	6.02%
Blackberry/8310 (Curve)	5.67%
Blackberry/8830	3.88%
Blackberry/9500 (Storm, Thunder)	3.11%
Palm/Treo 690 (Centro)	2.91%
Samsung/SPH-M800 (Instinct)	2.82%
Blackberry/8320 (Curve)	2.66%
T-Mobile/G1 (Android)	2.64%

August 2009	
Unique Devices	1,050
Short Tail (52.58%)	4
Long Tail (47.42%)	1,046
Top 10 Vendors/Devices	**Share**
Apple/iPhone 3G (Firmware 1.0-2.1)	25.15%
Blackberry/8330 (Curve)	19.03%
Blackberry/8310 (Curve)	4.23%
Blackberry/8130 (Pearl)	4.18%
Blackberry/9500 (Storm, Thunder)	3.76%
T-Mobile/G1 (Android)	3.41%
Blackberry/8830	2.58%
Palm/Treo 690 (Centro)	2.44%
Blackberry/8320 (Curve)	2.16%
Samsung/SPH-M800 (Instinct)	1.79%

November 2009	
Unique Devices	1,252
Short Tail (51.96%)	6
Long Tail (48.04%)	1,246
Top 10 Vendors/Devices	**Share**
Blackberry/8330 (Curve)	16.30%
Apple/iPhone 3G (Firmware 1.0-2.1)	14.03%
Apple/iPhone; 3G; 3GS (Firmware 2.2-3.1)	13.49%
Blackberry/8310 (Curve)	3.04%
Blackberry/8130 (Pearl)	2.69%
T-Mobile/G1 (Android, HTC Dream)	2.42%
T-Mobile/G1 (Android)	2.41%
Apple/iPod Touch (Firmware 1.0-2.1)	2.33%
Apple/iPod Touch (Firmware 2.2-2.2.1)	2.14%
Blackberry/9500 (Storm, Thunder)	1.73%

February 2010	
Unique Devices	1,211
Short Tail (51.26%)	4
Long Tail (48.74%)	1,207
Top 10 Vendors/Devices	**Share**
Apple/ iPhone; 3G; 3GS (Firmware 2.2-3.1)	26.65%
Blackberry/8330 (Curve)	13.27%
Apple/iPod Touch (Firmware 2.2-2.2.1)	5.62%
Blackberry/9630 (Tour, Niagara)	3.11%
Motorola/A855 (Droid, Sholes, Milestone)	2.62%
Blackberry/9500 (9530, Storm, Thunder)	2.56%
Google Android/Android Phone	2.27%
Blackberry/8310 (Curve)	2.14%
T-Mobile/G1 (HTC Dream)	2.11%
Blackberry/8530 (Curve2,Aries)	1.81%

Device Breakdown over Time, USA, Search & Information Industry Case (© Netbiscuits, 2010)

The tables above show the top 10 devices for a US-based mobile service from the search and information industry which is mainly targeted at business users. Between May 2009 and February 2010 we can see a battle going on between BlackBerry and Apple devices with regards to the top mobile Web access device for this mobile business service.

In May 2009 BlackBerry was in the lead position with a share of 20.40% for its 8330 Curve device. The iPhone 3G followed in position two with 17.39%. While Apple was only able to place one device among the top 10 at that time, BlackBerry devices were found six times among the top 10, accounting for a combined traffic share of 41.74%. It is obvious that in May 2009 BlackBerry devices were by far the most relevant channel for this mobile Web service.

In August 2009 the situation had changed slightly. Now the iPhone led the field with 25.15% and the BlackBerry 8330 Curve followed with 19.03%. But still BlackBerry was able to place six devices among the top 10 that generated 35.94% of all page requests. While BlackBerry was still number one, Apple certainly stake its claim in Q3 2009 for this service.

In November 2009 the new iPhone 3GS and an updated firmware for Apple devices (launched at the end of June) had penetrated the market. Even though BlackBerry was back in the pole position, the picture had changed dramatically. Suddenly Apple was able to place four devices among the top 10 with the iPod Touch showing up for the first time. Apple's combined traffic share rose up to 31.99% while BlackBerry fell back with only four devices among the top 10 and a combined share of 23.76%.

In February 2010 Apple devices consolidated their mobile Web page request quota at a combined 32.27% with the iPhone being back at the top again. BlackBerry lost slightly again and ended up with five devices among the top 10 accounting for 22.89% of all requests. Within one year the BlackBerry quota was cut into half while Apple devices managed to double their share during the same period of time.

Besides the general BlackBerry vs. Apple battle it is interesting to notice how single devices lost and gained relevance over time. Palm's Treo 690 and Samsung's SPH-M800 lost their top 10 positions well before the end of 2009, while Android devices successfully entered the market. Also remarkable is the success of Motorola's A855 that jumped to position five among the top 10 in February 2010. Most remarkable besides the unique success story of Apple's mobile devices is the long-standing success of BlackBerry's 8330 Curve device. Throughout one year it held position one or two among the Top 10 of this specific mobile Web service and always managed to deliver 2-digit traffic shares.

With regards to the future it will be interesting to monitor if the decline that happened to BlackBerry last year might happen to Apple in the years to come.

6.2 Germany, Publishing Industry

The following tables show how the top 10 devices changed between May 2009 and Februar 2010 accessing a mobile news service from Germany.

May 2009	
Unique Devices	996
Short Tail (51.89%)	9
Long Tail (48.11%)	987
Top 10 Vendors/Devices	**Share**
Apple/iPhone 3G	23.75%
Nokia/E71	6.75%
Blackberry/9000 (Bold)	4.55%
Nokia/E51	3.29%
Nokia/N95	3.12%
Blackberry/8310 (Curve)	3.07%
Apple/iPod Touch	3.00%
Nokia/5800 (XpressMusic)	2.21%
Blackberry/8800	2.17%
Microsoft/PocketPC	2.14%

August 2009	
Unique Devices	1,042
Short Tail (51.70%)	7
Long Tail (48.30%)	1,035
Top 10 Vendors/Devices	**Share**
Apple/ iPhone; 3G; 3GS (Firmware 2.2-3.1)	23.31%
Misc/Other Browser	10.04%
Nokia/E71 (E71x)	5.89%
Blackberry/9000 (Bold)	4.29%
Nokia/5800 (XpressMusic, 5802)	2.95%
Apple/iPod Touch (Firmware 2.2-2.2.1)	2.67%
Nokia/E51	2.55%
Nokia/N95	2.21%
Microsoft/PocketPC	2.04%
Blackberry/8310 (Curve)	2.00%

November 2009	
Unique Devices	1,037
Short Tail (51.08%)	7
Long Tail (48.92%)	1,030
Top 10 Vendors/Devices	**Share**
Apple/ iPhone; 3G; 3GS (Firmware 2.2-3.1)	26.70%
Nokia/E71 (E71x)	5.95%
Misc/Other Browser	4.70%
Blackberry/9000 (Bold)	4.34%
Nokia/5800 (XpressMusic, 5802)	3.65%
Apple/iPod Touch (Firmware 2.2-2.2.1)	3.10%
Palm/Pre (P101EWW, Russell)	2.64%
Nokia/N97	2.26%
Nokia/E51	2.25%
Nokia/N95	1.82%

February 2010	
Unique Devices	1,036
Short Tail (50.77%)	7
Long Tail (49.33%)	1,029
Top 10 Vendors/Devices	**Share**
Apple/ iPhone; 3G; 3GS (Firmware 2.2-3.1)	29.80%
Apple/iPod Touch (Firmware 2.2-2.2.1)	4.11%
Nokia/E71 (E71x)	4.05%
Blackberry/9000 (Bold)	3.95%
Nokia/5800 (XpressMusic, 5802)	3.20%
Palm/Pre (P101EWW, Russell)	3.17%
Nokia/N97	2.49%
Blackberry/8900 (Curve)	2.08%
Nokia/E51	1.75%
Samsung/GT-S8000 (Jet, GT-S8003)	1.72%

Device Breakdown over Time, Germany, Publishing Industry Case (© Netbiscuits, 2010)

With regards to the overall number and the short tail of devices, this German news service showed continuity between May 2009 and February 2010. Round about 1,000 unique devices requested the site per month. In average 7.5 devices placed the first 50% of all site requested, while an average 1020.25 devices formed the mobile device *long tail*, responsable for the second 50% of all site requests.

Looking at specific devices, Apple, Nokia and BlackBerry were dominating the top 10 device list with Apple in the undisputed pole position again. In February 2010 the aggregated traffic share of Apple devices was three times bigger than the share of Nokia, the second best device manufacturer in this top 10 list.

While Apple was able to increase the share of its devices from 26.75% in May 2009 to 33.91% in February 2010 the other two manufacturers lost ground. Nokia decreased from 15.37% to 11.48% and BlackBerry from 9.97% to 6.03% in the same period of time, not only because of Apple's lasting success, but also because new devices from Palm and Samsung optimized for mobile Web access entered the German market successfully throughout 2009. Together those two devices claimed just under 5% of all page requests on this site in February 2010.

Also worth a note is the fact that the iPod Touch jumped from position six to position two between November 2009 and February 2010, showing once more that non-carrier devices are an increasing factor for mobile Web access.

7 The Mobile Web without the iPhone

What would the world look like without the iPhone? This mobile Web portal integrated on-deck with one of the US carriers besides Apple partner AT&T gives a clue. All data refer to February 2010.

Most striking at first sight: No device is able to secure an outstanding traffic share. There is a leader, of course, but the followers are not "miles away" like in many other cases that involve the iPhone.

The device *short tail* (12) is much longer than "normally" in the US and the decline in share per device is much smoother than it would be, if the iPhone was involved. Alltogether 26 devices are able to realize a traffic share higher than 1%.

These figures prove the exceptional status that Apple's iPhone has today.

Without it nobody would ever think about the question, if it could be sufficient to optimize and deliver mobile Web sites and services for one device only.

Key Indicators	
Report Period	Feb. '10
Unique Devices	749
Short Tail (50.33%)	12
Long Tail (48.77%)	737

Top 20 Vendors/Devices	**Share**
Samsung/SPH-M800 (Instinct)	9.59%
LG/LG840	6.27%
Samsung/SCH-R350	5.62%
LG/LX265, LG265, VM265 (Rumor 2)	5.22%
Access/NetFront	4.03%
Sanyo/SCP-2700	3.49%
Samsung/SGH-E250 (E256 Brasil, E250L)	3.02%
Microsoft/PocketPC	2.74%
Samsung/SPH-M550 (Exclaim)	2.65%
Blackberry/8330 (Curve)	2.62%
Samsung/SPH-M540 (Rant)	2.57%
Samsung/SPH-A900	2.51%
Samsung/SPH-M520	2.13%
Samsung/generic	1.99%
LG/260 (Rumor)	1.58%
LG/LX370	1.56%
Sanyo/SCP-3800 (Katana LX)	1.49%
LG/LX600 (Lotus)	1.44%
Motorola/V950	1.38%
Samsung/SPH-M560 (Reclaim)	1.32%

Mobile Web without iPhone, USA, case integrated on-deck with a US carrier other than Apple partner AT&T (© Netbiscuits, 2010)

8 What would your Device Breakdown look like?

If your business is part of the media and entertainment industry, this section might be of special interest for you. It provides the top 40 device listings for mobile Web portals from the media and entertainment industry in three different markets around the world. Following reports will shed a light on other industries.

8.1 Malaysia, Media & Entertainment Industry

The mobile device breakdown of this media and entertainment site from Malaysia differs widely from the global device statistics of the Netbiscuits platform.

Its overall number of unique devices (723) was significantly lower while its device *short tail* (26) was more than twice as long as the global Netbiscuits device *short tail* in February 2010.

The top 10 devices were dominated by Nokia exclusively, the leading device manufacturer in Malaysia and many other Asian markets. BlackBerry and Apple showed up in position 15 and 16 for the first time. The first Android device held position number 90.

Unlike in other cases mentioned earlier in this report, the top 3 devices of this mobile site did not claim a major traffic share. In fact there was not even a device with a two-digit quota of all site requests in February 2010.

Only one device had a share above 5% and the top 3 devices accounted for only 15.65% of all traffic. Not fewer than 22 devices had a quota higher than 1%. Together they made up 47.11% of all traffic.

Key Indicators	
Report Period	Feb. '10
Unique Devices	723
Short Tail (50.48%)	26
Long Tail (49.52%)	697

Top 30 Vendors/Devices	**Share**
Nokia/N73 (Services)	6.66%
Nokia/N70	4.77%
Nokia/5800 (XpressMusic, 5802)	4.22%
Nokia/N95	3.32%
Nokia/N95 8GB	2.74%
Nokia/N82	2.48%
Nokia/E71 (E71x)	2.16%
Nokia/5130 XpressMusic	2.13%
Nokia/3110 classic	1.72%
Nokia/E63	1.55%
Nokia/6120 classic (6122c)	1.51%
Nokia/N97	1.51%
Misc/Maui Wap Browser	1.45%
Nokia/N81	1.44%
Blackberry/8520 (Gemini)	1.36%
Apple/Apple iPhone; 3G; 3GS (Firmware 2.2-3.1)	1.25%
Nokia/N72	1.25%
Nokia/N96	1.16%
Nokia/6300	1.15%
Nokia/2700 classic	1.13%
Blackberry/9700 (Onyx, Bold 2)	1.13%
Blackberry/9000 (Bold)	1.04%
SonyEricsson/W910i	0.88%
Nokia/N79	0.86%
Nokia/N78 (Galaxy)	0.81%
Microsoft/PocketPC	0.81%
Samsung/GT-S5233	0.81%
Nokia/E51	0.79%
Samsung/GT-S8000 (Jet, GT-S8003)	0.78%
Nokia/E72	0.76%

Device Breakdown, Malaysia, Media & Entertainment Industry Case (© Netbiscuits, 2010)

8.2 GERMANY, MEDIA & ENTERTAINMENT INDUSTRY

Compared to the previous case, the following media and entertainment site from Germany shows similarities as well as differences with regards to Netbiscuits' global device breakdown in February 2010.

Like in the Malaysian case its overall number of unique device requesting the site (729) was significantly lower while its device *short tail* (3) was much shorter than the global Netbiscuits device *short tail* in February 2010.

The top 10 devices were dominated by Apple, Nokia and Samsung with Android, LG and SonyEricsson being the closest followers. A BlackBerry device showed up in position 20 for the first time.

With regards to the number of site requests Apple devices clearly trumped all other manufacturers accounting for an added share of 50.96%. The top 3 devices even added up to 52.88%. Only 10 other devices had a quota higher than 1%. Together all 13 devices generated 68.58% of all site requests.

766 other devices stayed below the 1.00% quota. Together they accounted for 31.42% of all mobile Web site requests for this service in February 2010.

Key Indicators	
Report Period	Feb. '10
Unique Devices	779
Short Tail (52.88%)	3
Long Tail (47.12%)	776

Top 30 Vendors/Devices	**Share**
Apple/ iPhone; 3G; 3GS (Firmware 2.2-3.1)	35.59%
Apple/iPod Touch (Firmware 2.2-2.2.1)	13.96%
Nokia/5800 (XpressMusic, 5802)	3.33%
Nokia/N95	2.34%
Opera/Opera Mini 4	1.99%
Samsung/SGH-F480v (Roxy, Tocco)	1.98%
Samsung/S5230 (Ely)	1.73%
Samsung/GT-S8000 (Jet, GT-S8003)	1.63%
Nokia/N97	1.42%
Apple/iPhone; 3G (Firmware 1.0-2.1)	1.41%
HTC/Magic (T-Mobile myTouch 3G, Pioneer)	1.11%
LG/KP500 (Cookie)	1.09%
SonyEricsson/K800i	1.00%
SonyEricsson/W995	0.93%
Nokia/N95 8GB	0.89%
Nokia/E71 (E71x)	0.87%
Samsung/GT-I6410 (M1)	0.71%
LG/HB620-T (Obigo)	0.69%
Nokia/6300	0.68%
Blackberry/9000 (Bold)	0.60%
LG/KM900 (Arena)	0.60%
SonyEricsson/P100 (Satio, Idou, Kokoro)	0.60%
Blackberry/9500 (9530, Storm, Thunder)	0.50%
SonyEricsson/U10i (Aino, SARA)	0.50%
SonyEricsson/C905 (Shiho, C950)	0.49%
Nokia/N70	0.46%
LG/KU990	0.45%
Nokia/Series 60 3rd Edition	0.44%
Blackberry/8900 (Curve)	0.43%
Nokia/E51	0.42%

Device Breakdown, Germany, Media & Entertainment Industry Case (© Netbiscuits, 2010)

8.3 USA, Media & Entertainment Industry

The third media and entertainment case that we want to highlight here comes from the USA. It shows some remarkable differences compared to the sites from Malaysia and Germany.

First of all, its total number of unique devices (1.390) was nearly twice as high in February 2010 compared to the other two cases. Media and entertainment lovers in America use a wider variety of devices to access the mobile Web than the same kind of users in Malaysia or Germany.

More remarkable than this is the fact that the No. 1 device was Apple's iPod Touch and No. 3 was Sony's Playstation Portable. This is not typical, but it shows that for the mobile Web it is absolutely necessary to optimize content and services for more and other devices than mobile phones only, if the needs of specific target groups should be met.

With regards to the number of site requests, the top 10 was dominated by BlackBerry (3) Apple (2), and Android (2) devices. Only nine devices had a share higher than 1%, including one device from Motorola and one from Nokia. Together these nine devices generated 61.85% of all traffic.

1.381 other devices stayed below the 1.00% share. Together they accounted for 38.15% of all site requests in February 2010.

Key Indicators	
Report Period	Feb. '10
Unique Devices	1,390
Short Tail (50.01%)	3
Long Tail (49.99%)	1,387

Top 30 Vendors/Devices	**Share**
Apple/iPod Touch (Firmware 2.2-2.2.1)	22.57%
Apple/ iPhone; 3G; 3GS (Firmware 2.2-3.1)	16.68%
Sony/Playstation Portable (PSP, PSP go)	10.76%
Blackberry/8330 (Curve)	2.94%
Motorola/A855 (Droid, Sholes, Milestone)	2,47%
Google Android/Android Phone	1.92%
Blackberry/9500 (9530, Storm, Thunder)	1.88%
T-Mobile/G1 (HTC Dream)	1.55%
Nokia/5130 XpressMusic	1.09%
Blackberry/8520 (Gemini)	0.86%
Access/NetFront	0.85%
Blackberry/9630 (Tour, Niagara)	0.85%
HTC/Magic (T-Mobile myTouch 3G, Pioneer)	0.83%
Blackberry/9000 (Bold)	0.81%
Opera/Opera Mini 4	0.78%
Blackberry/8900 (Curve)	0.75%
Microsoft/PocketPC	0.72%
Blackberry/8530 (Curve2,Aries)	0.66%
Misc/Maui Wap Browser	0.65%
Samsung/SGH-A877 (Impression)	0.63%
Blackberry/9700 (Onyx, Bold 2)	0.59%
Palm/Pre (P101EWW, Russell)	0.57%
Nokia/2700 classic	0.57%
Nokia/5800 (XpressMusic, 5802)	0.57%
LG/CU920	0.56%
Samsung/A887 Solstice	0.48%
Samsung/SGH-A867 (Eternity)	0.44%
Nokia/E71 (E71x)	0.41%
Blackberry/8130 (Pearl)	0.41%
Nokia/Series 60 3rd Edition	0.41%

Device Breakdown, USA, Media & Entertainment Industry Case (© Netbiscuits, 2010)

9 Pick of the Month

Sometimes our findings are surprising, even for Netbiscuits. In this section we will highlight one example that we found highly remarkable in February 2010.

Netbiscuits delivers a broad variety of mobile search and information services in many different markets around the world. This search and information service from Germany stands out as it showed an unusually high traffic share transferred via mobile gaming devices in February 2010.

Three gaming devices made it into the Top 10. Sony's Playstation 3 even claimed the pole position among all mobile Web access devices, followed by Nintendo Wii (No. 4) and Sony's PSP (No. 8). Together these three devices transferred 15.14% of all mobile page requests.

Compared to these devices Apple's iPhone transferred only a minimal share.

This result is even more amazing as the mobile search and information service discussed is not explicitly targeted at a very young or very gaming oriented target group.

This example once more gives evidence that real world customers find their way into "the mobile Web" via a broad array of different mobile devices, including gaming consoles, music players, e-readers, tablet computers and, of course, also via smart and feature phones.

Netbiscuits' award-winning multi-platform publishing solution enables you to deliver an optimized end-user experience to all these different devices.

Key Indicators	
Report Period	Feb. '10
Unique Devices	611
Short Tail (50.12%)	18
Long Tail (49.88%)	593

Top 30 Vendors/Devices	**Share**
Sony/Playstation 3	9.59%
Nokia/5800 (XpressMusic, 5802)	6.07%
Nokia/N97	3.30%
Nintendo/Wii	3.24%
HTC/Magic (T-Mobile myTouch 3G, Pioneer)	3.20%
Apple/Apple iPhone; 3G; 3GS (Firmware 2.2-3.1)	2.92%
Motorola/A855 (Droid, Sholes, Milestone)	2.38%
Sony/Playstation Portable (PSP, PSP go)	2.31%
Nokia/E71 (E71x)	2.27%
Blackberry/9000 (Bold)	1.97%
HTC/Hero (T-Mobile G2 Touch, Eris)	1.82%
Nokia/N95	1.82%
T-Mobile/G1 (HTC Dream)	1.77%
Palm/Pre (P101EWW, Russell)	1.71%
Samsung/GT-S8000 (Jet, GT-S8003)	1.69%
Nokia/E51	1.39%
Samsung/SGH-F480v (Roxy, Tocco)	1.34%
Samsung/S5230 (Ely)	1.33%
Microsoft/PocketPC	1.28%
Nokia/N95 8GB	1.23%
SonyEricsson/C905 (Shiho, C950)	1.10%
Blackberry/8900 (Curve)	1,10%
SonyEricsson/W995	1.09%
Opera/Opera Mini 4	1.05%
Nokia/5800 (XpressMusic, 5802) (Opera Mini)	1.00%
Nokia/N82	0.96%
Nokia/N97 mini	0.88%
Nokia/E71 (E71x) (Opera Mini)	0.84%
Blackberry/9500 (9530, Storm, Thunder)	0.84%
Google Android/Android Phone	0.84%

Device Breakdown, Germany, Search & Information Industry Case (© Netbiscuits, 2010)

10 TAKE AWAYS

- By far the largest number of devices that are requesting mobile Web sites rest within the *long tail* of all Web-enabled mobile devices. Optimizing mobile Web sites only for the few devices that dominate a market means intentionally locking out the vast majority of all Web-enabled handsets and their users from your content and services.
- Besides the few devices that dominate there are always hundreds and thousands of other mobile devices from many different manufacturers that are used for accessing the Web. Taken together, the numerous devices that make up the long tail accounted for the major share of all mobile Web site requests via Netbiscuits between February 2009 and February 2010.
- The impact of any device on traffic statistics varies by region. Similarly, the destination site's industry vertical and the prospect customers of the service play an important role when it comes to the question which devices generate the biggest amount of page requests.
- There are always hundreds of devices that are used to access a mobile Web site. To get a clue about which mobile devices are used for mobile Web access in a certain market, metrics from all devices in the market are required on a daily basis. Generally Netbiscuits statistics show that the number of mobile devices used for accessing the Web grows over time in any market and for any service that is marketing its mobile Web offerings successfully.
- The impact of any device changes over time as new devices are constantly introduced to the market. The iPhone inspired a whole new class of devices that are primarily optimized for accessing the Web. A growing number of these devices are successfully gaining ground against Apple's iconic handset.
- In markets or carrier networks that are not penetrated by the iPhone there is no single device that accounts for the mayor amount of site requests. The quota of requests per unique device declines much smoother and the number of devices that account for the first 50% of all requests is much higher than if the iPhone was involved.
- In Asian markets Nokia is still the leading device manufacturer. Apple, BlackBerry and Andoid devices are playing an inferior role.
- Real world customers find their way into the mobile Web via a broad array of different mobile devices, including gaming consoles, music players, e-readers, tablet computers and, of course, also via smart and feature phones. Netbiscuits' award-winning multi-platform publishing solution enables you to deliver an optimized end-user experience to all these devices.

11 CONTACT

If you want to get in touch with Netbiscuits please visit our Web site at www.netbiscuits.com or contact one of our three offices.

Europe

Netbiscuits GmbH
Europaallee 10
67657 Kaiserslautern
GERMANY

Phone: +49 631 68036-100
E-Mail: sales_emea@netbiscuits.com

North & South America

Netbiscuits, Inc.
1760 Reston Parkway, Suite 304
Reston, VA 20190
USA

Phone: +1 703 435 9008
E-Mail: sales_america@netbiscuits.com

Asia

Netbiscuits Pte Ltd
#02-01 The Aquarius
21 Science Park Road
Singapore 117628

Phone: +65 6777 8337
E-Mail: sales_apac@netbiscuits.com