



Always Connected

How Smartphones And Social Keep Us Engaged

An IDC Research Report, Sponsored By Facebook



In This Study

In this latest research study from IDC, sponsored by Facebook, we conducted an online survey of 7,446 18-44 year old iPhone and Android smartphone owners in the U.S. over the course of one week in March. We surveyed more than 1,000 people each day.

This study was designed to understand how smartphone owners use their phones over the course of a day and the week, with an emphasis on **social and communication** applications and services. Because of this, the applications list was not designed to be exhaustive of all mobile application categories.

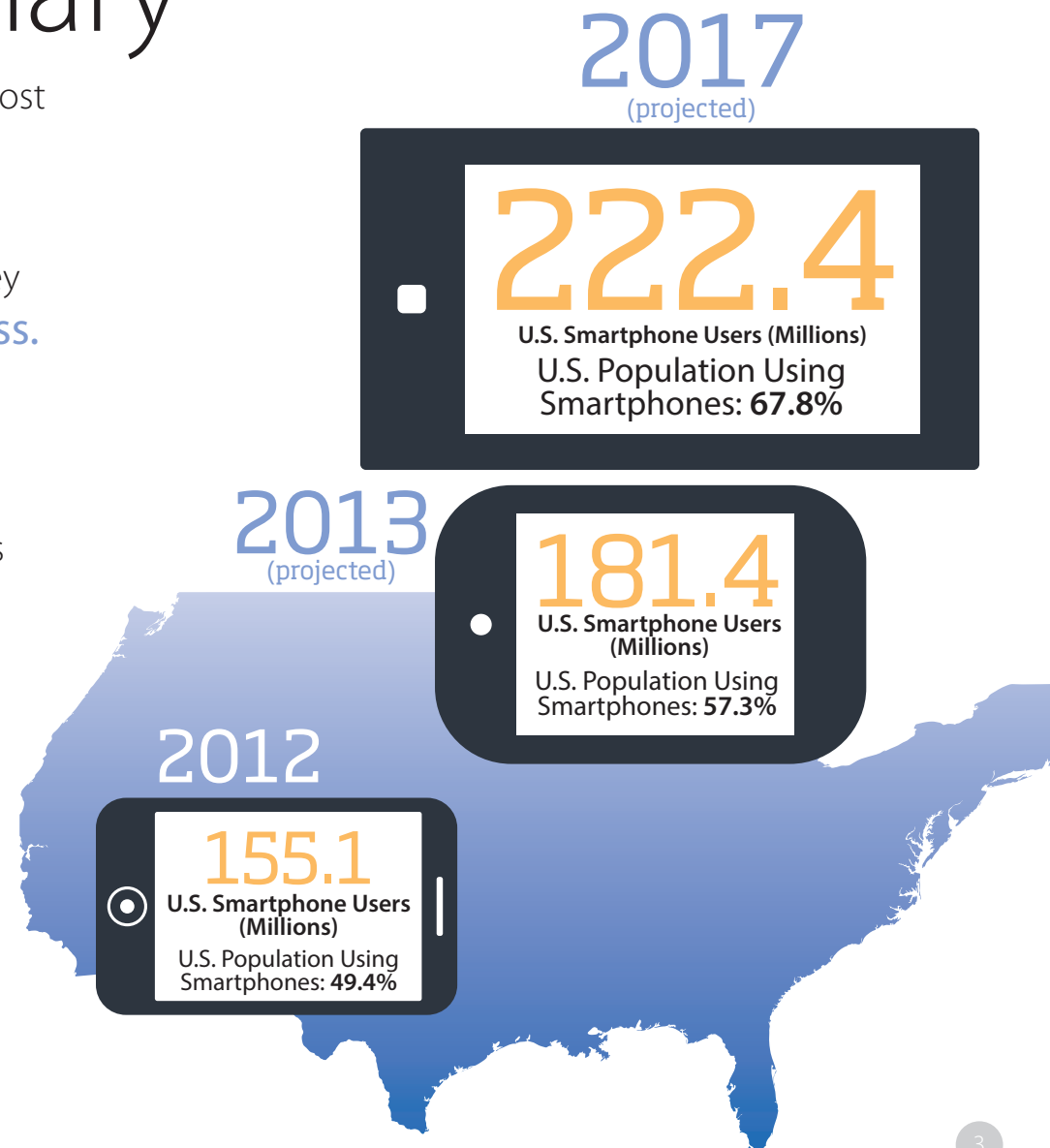


Executive Summary

Think about your typical day. When do you feel the most or least connected to people, information and the world around you?

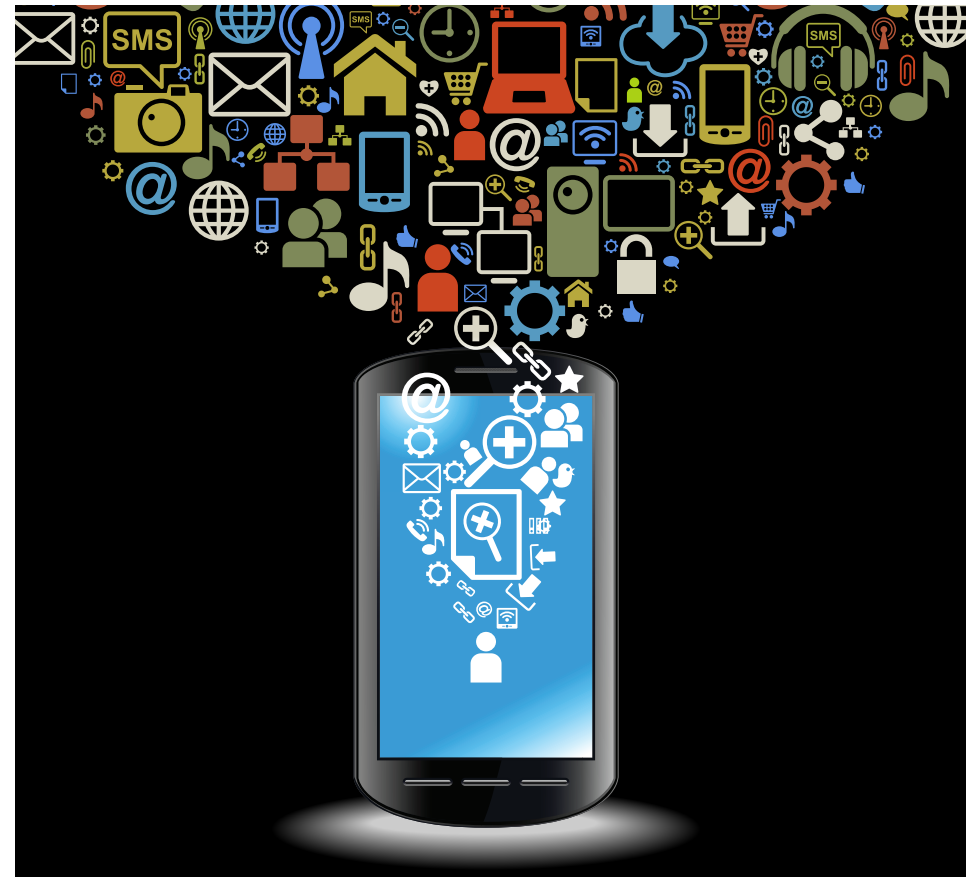
In this study from IDC, sponsored by Facebook, the key finding is that **mobile + social = connectedness**. Smartphones, coupled with rich applications and mobile data services, allow us to connect with our family, friends and community from the moment we wake up until the end of our day. Our research shows that, rather than feeling overwhelmed by it, we enjoy and value this increased social connectedness.

Today, **half of the total US population** uses smartphones. The convenience of being able to interact with anyone, anytime, anywhere, makes the phone a more critical tool than ever before. >



◀ Given the very personal nature of our mobile phones, how we use them elicits various feelings. A **sense of being connected** is the strongest sentiment and it spans demographics and brands, services and applications used.

The services that drive the highest levels of connectedness across the largest number of people are *texting/messaging, talking on the phone, and direct messaging via Facebook*. What is most striking about the **top 3** is that they are **direct**, with a **specific person or group**, and require a more immediate **response** versus most other methods of social networking and communication. ▶



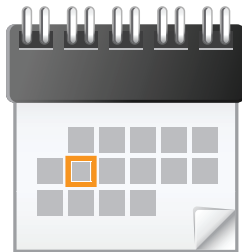
Percentage of respondents that feel connected when using these applications (top 3):



◀ People have a *universal* need to connect with others, especially those they care deeply about. This coupled with mass market adoption of smartphones means that social engagement via phones has become mainstream.

Device *pocketability* drives engagement throughout the day and when it's *most convenient* for each person. Over a week, we see the highest levels of engagement Friday through Sunday. These are the days we connect with those most important to us both online and in the physical world.

The **weekend is being redefined as social and mobile** allow for more fluid and asynchronous experiences throughout the day and from one day to the next. ▶



... the highest levels of engagement are Friday through Sunday, with the peak on Sunday.

Monday - Sunday

84%

of respondents' time is spent on phone communicating via text, email, social vs. only **16% on phone calls**

Average daily time spent communicating on smartphone: 132 minutes

.....

70% of respondents use Facebook on their phone; and of this group, **61% use it each day.**

.....

These are pocketable, personal computers– not phones.

◀ *Engagement on Facebook is multifaceted.* From lots of “snacking” on News Feeds and friends’ timelines, to connecting with others by commenting on their posts or photos, to privately messaging with individuals and groups, *engagement is broad and rich.*

33% of mobile Facebook users message their friends directly, privately each day. **Facebook’s messaging platform** enables highly valued interactions, making it a *top 3 social and communications service driving connectedness.*

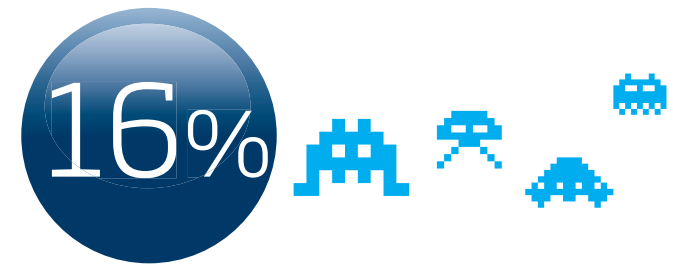
Beyond communication, Facebook drives engagement through games and application discovery. We expect application discovery on Facebook to grow as people share and as users seek simpler, more direct ways to find great applications and experiences.

Facebook & Mobile— Beyond Communication

Read my news feed	82%
Respond/post comments on friends’ updates	49%
Post status updates	38%
Visit friends’ timeline	37%
Message friends directly	33%
Play games	16%
Post pictures/videos	15%
Communicate in Facebook groups	12%
Find applications to use	7%



of daily users use Facebook
to find new applications



of daily users play
games on Facebook

Most Popular Activities On Smartphones

For those of us that own a smartphone, it comes as no surprise that these devices have become the central social, communication and information tool for so many Americans.

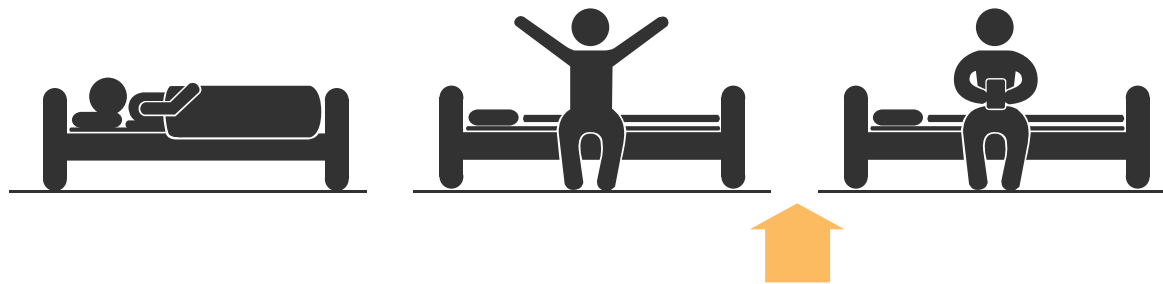
This list of the most commonly used applications/categories we asked about demonstrates this.

While the exact percentages and order vary slightly by segment, the top 7 activities are consistent among 18-44 year olds, males and females, Android and iOS, etc.

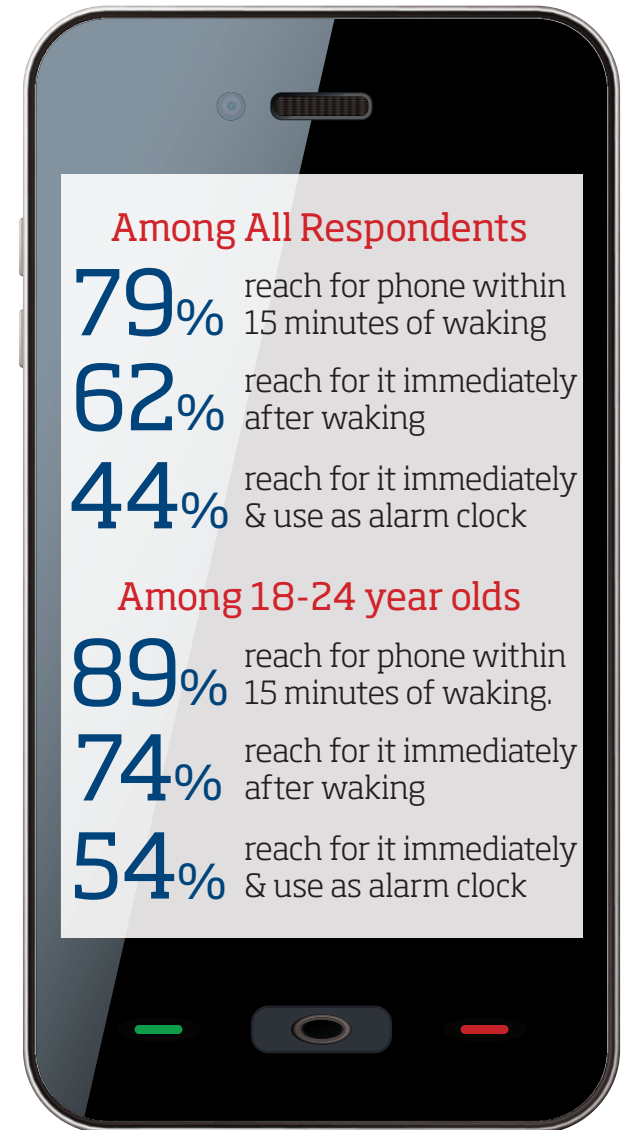


What Do You Do When You First Wake Up?

Our interaction with each other through our phones begins as soon as we awake. Within the first 15 minutes of waking up, **4 out of 5** smartphone owners are checking their phones and among these people, nearly 80% reach for their phone before doing anything else. These statistics alone drive home the utility of and reliance on smartphones.

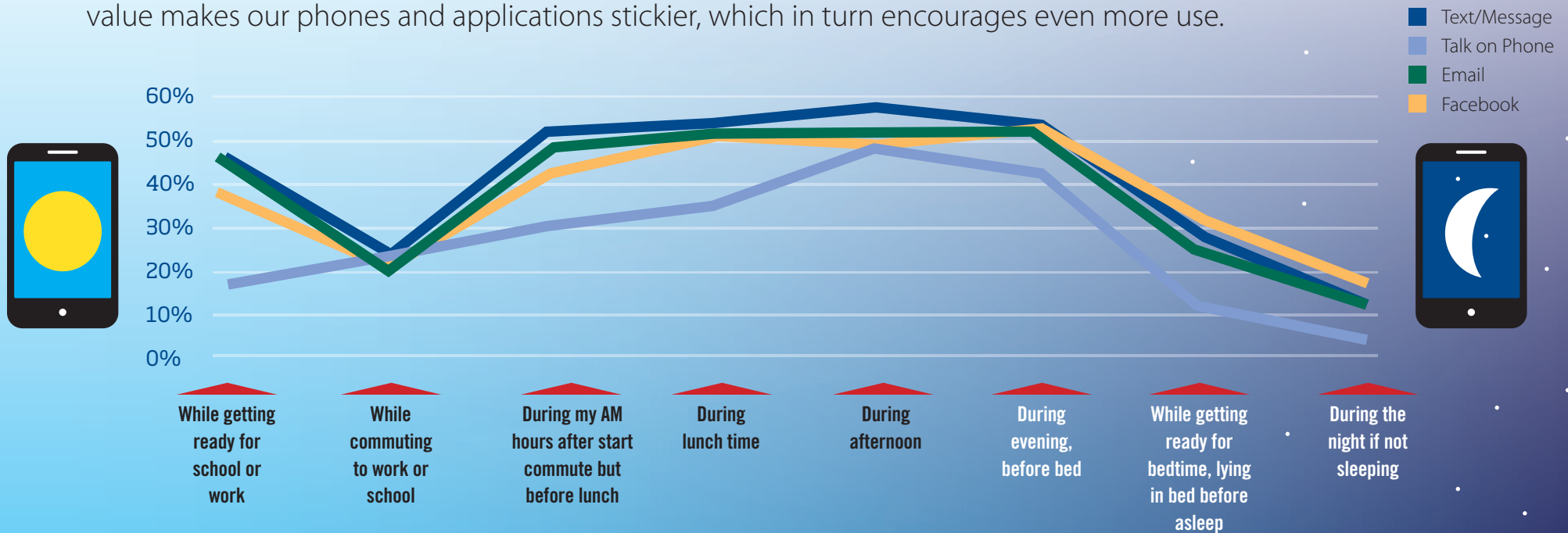


Within the **first 15 minutes** of waking up, **4 out of 5** smartphone owners are checking their phones.



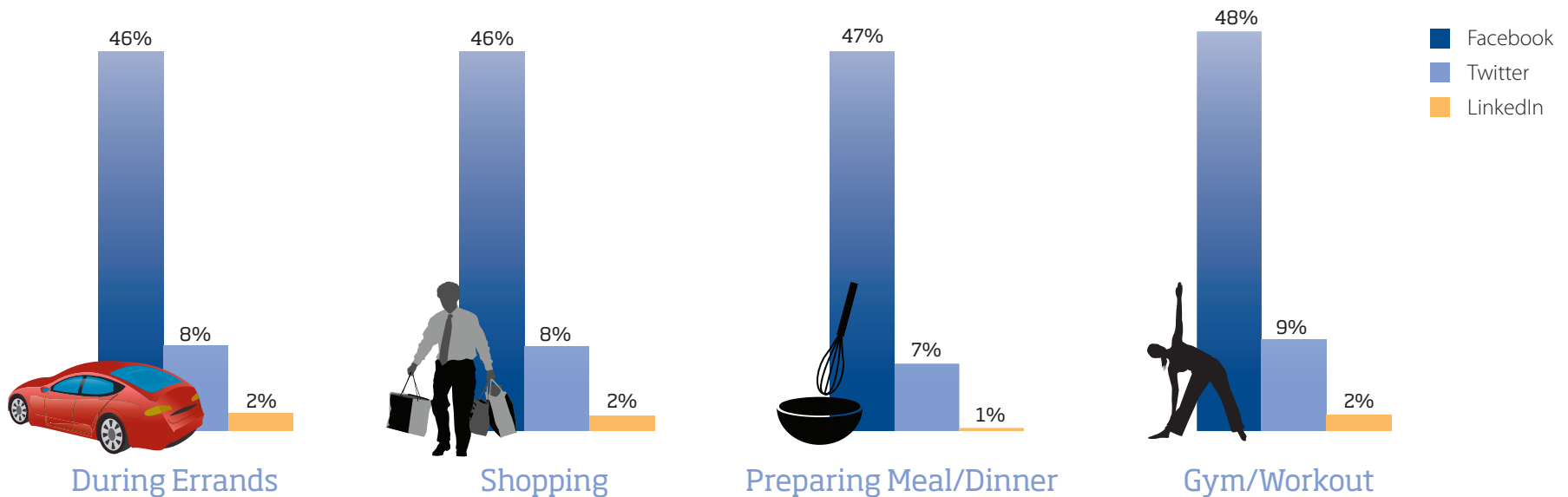
A Day In The Life Of Our Smartphones

79% of respondents have their phone on or near them for all but up to 2 hours of their waking day. This encourages a steady stream of interactions via our phones throughout the day. The more we use our phones to connect, be productive, etc. the more value is delivered to us. IDC believes this perceived value makes our phones and applications stickier, which in turn encourages even more use.



Using Social During Everyday Activities

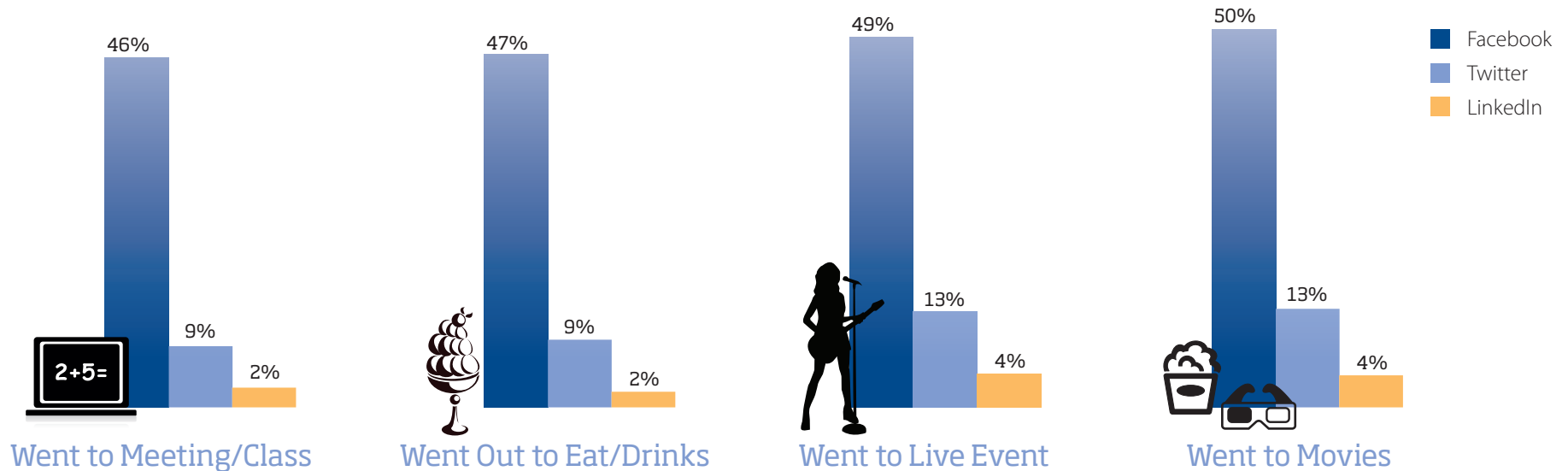
Social has become so engrained in our behavior that we engage with it even when doing every day activities. Using Facebook throughout the day *is a given* for most smartphone owners. The multitude of ways we use social, and specifically Facebook, (one-on-one, one-to-many, private, public, synchronous, asynchronous, etc.) allow it to fit easily and seamlessly throughout our days.



Social Apps Play Important Role During Social Events



Social begets social. The use of social applications is higher during events when we are out socially. This is related to the desire to share experiences, especially when we are with those we care most about. Social applications are designed with calls to action, like posting status updates and check-ins. This in turn drives more sharing, especially when we are out socializing.



A Week In The Life Of Our Smartphones

Minutes Spent Connecting Each Day

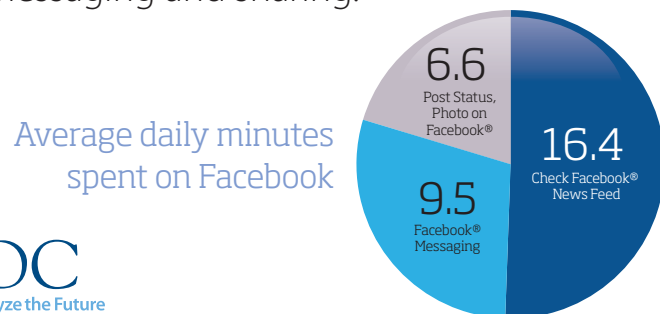
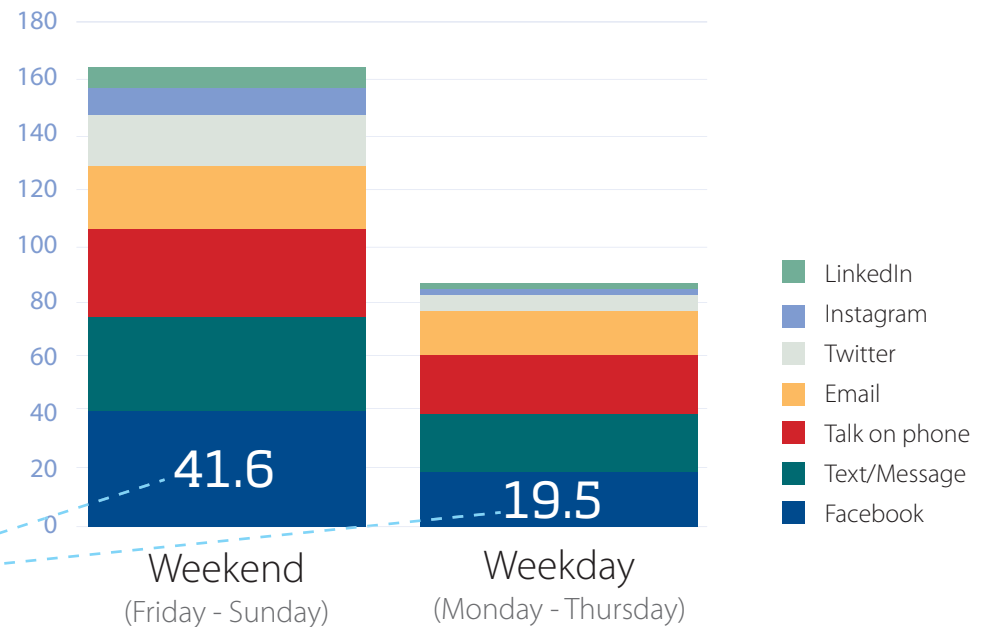


The weekend's 2x engagement demonstrates how critical these devices and applications are to our most important social relationships.

Of the total time spent on social and communications activities on a smartphone, **Facebook dominates**, making up *1 out of every 4 minutes*.

Facebook drives engagement through a multifaceted approach of consumption, private messaging and sharing.

Average daily time spent on Facebook: **32:51**
Average daily time spent communicating on smartphone: 131:43



Average daily minutes spent on Facebook

A Week In The Life Of Our Smartphones

Number of Times We Engage Each Day

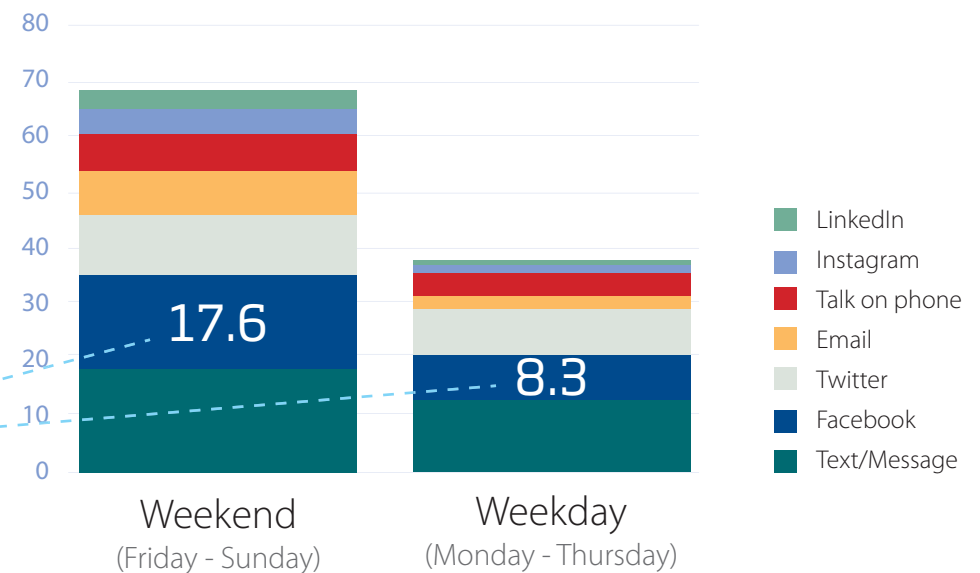
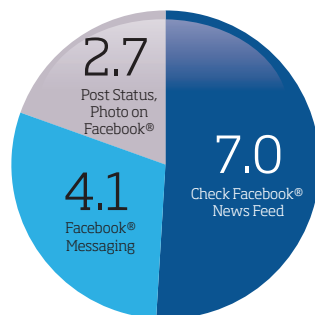


Social on mobile allows people to engage easily throughout the day, even when doing other things.

Over the week, texting/messaging and using Facebook are the most popular interactions we conduct on our smartphones.

Average number of daily sessions on Facebook: **13.8**
Average session length: 2:22

Average daily sessions spent on Facebook

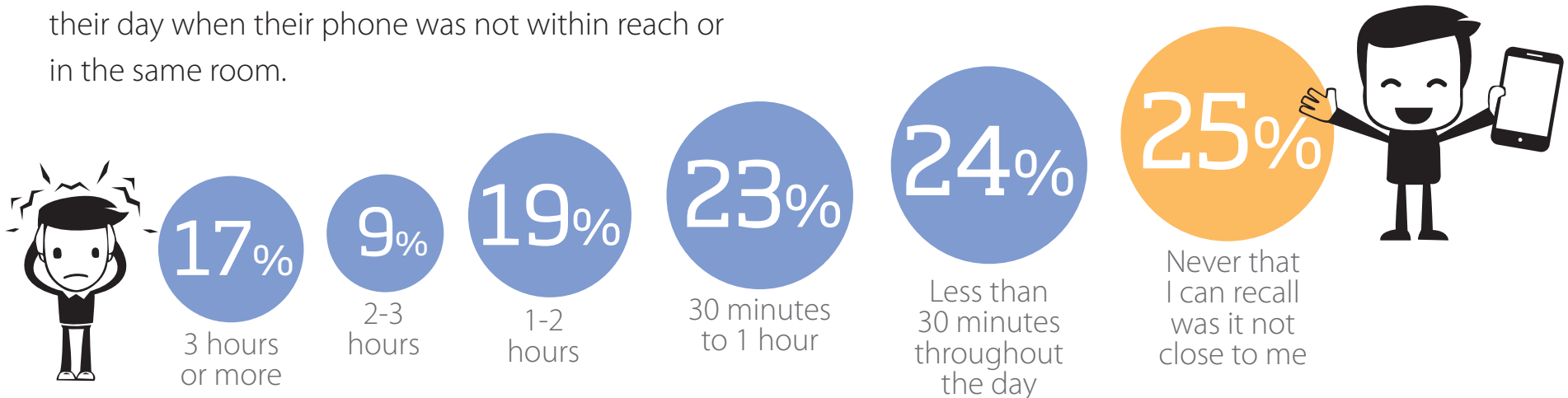


Can You Recall The Last Time Your Phone Was **Not** Within Ear Shot?

63% of smartphone owners keep their phone with them *for all but an hour of their waking day*. 79% keep it with them for all but two hours of their day.

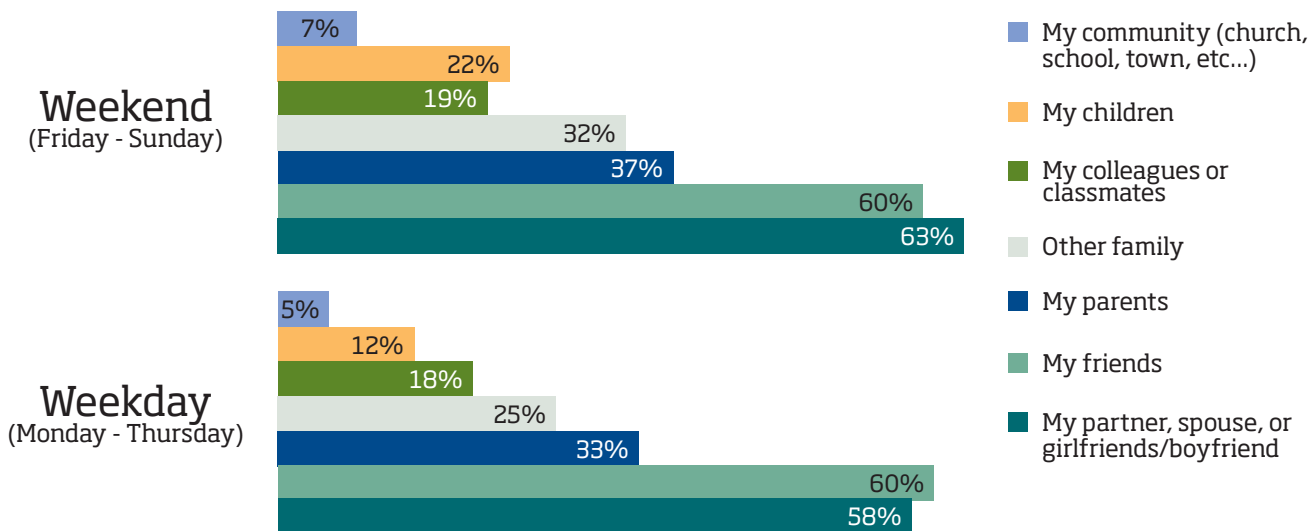
1 out of 4 of all respondents didn't recall a time in their day when their phone was not within reach or in the same room.

Whether it is a weekday or weekend, the amount of time away from one's phone didn't vary—it is a *critical tool* for connecting with friends, family and colleagues *every day*.



Who Our Smartphones Connect Us To

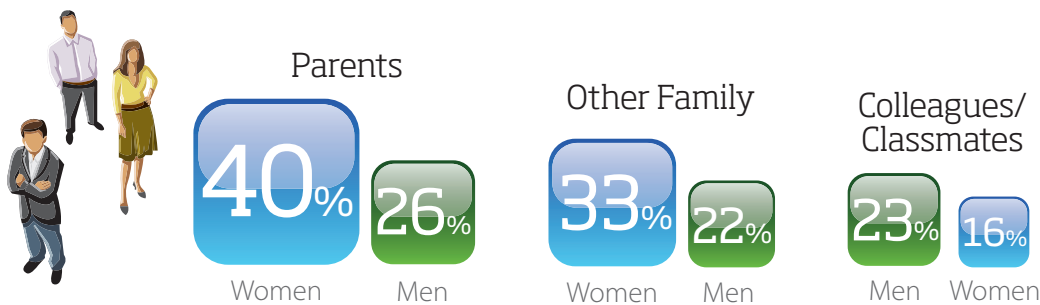
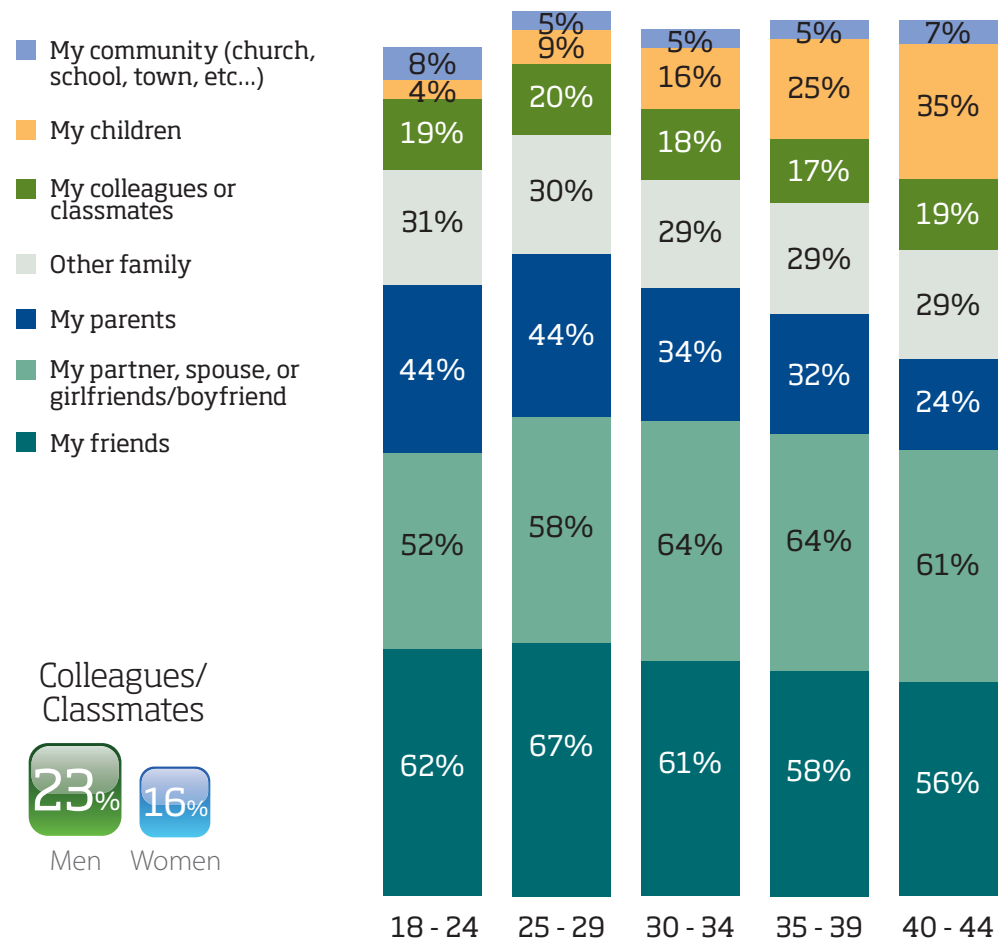
Over the weekend, we have a stronger sense of connectedness with the important people in our lives as we interact with them more in the physical world and through social media on our phones. Even our interactions with colleagues/classmates is higher over the weekend — another indication of the ever increasing fluidity of time and schedules given our nearly non-stop connected lifestyle.



A Closer Look At Who We Connect With Through Our Smartphones

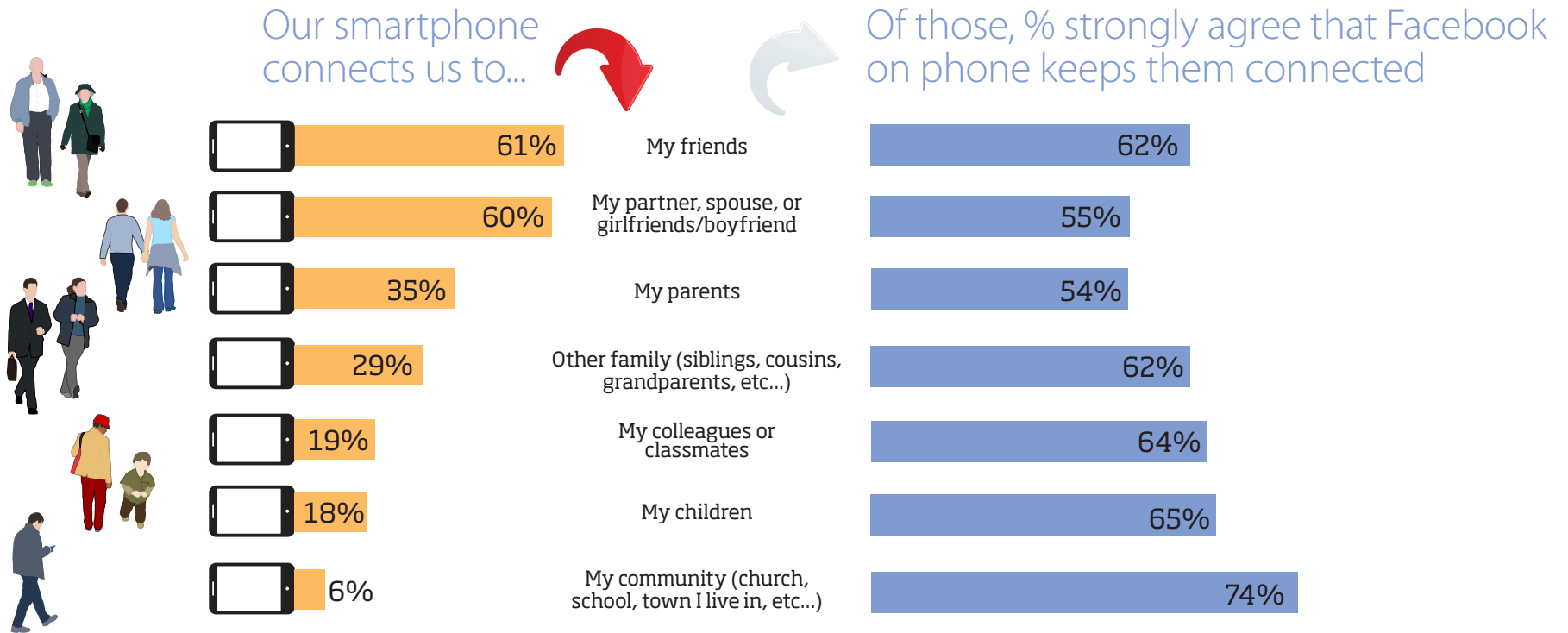
Looking at the differences across age groups yields both telling and expected results. The inverse of those that selected "My Parents" vs "My Children" is directly related to age, generation and life stage.

Both men and women feel connected to their friends, significant others and children at similar levels. Strong differences exist when examining other relationships:



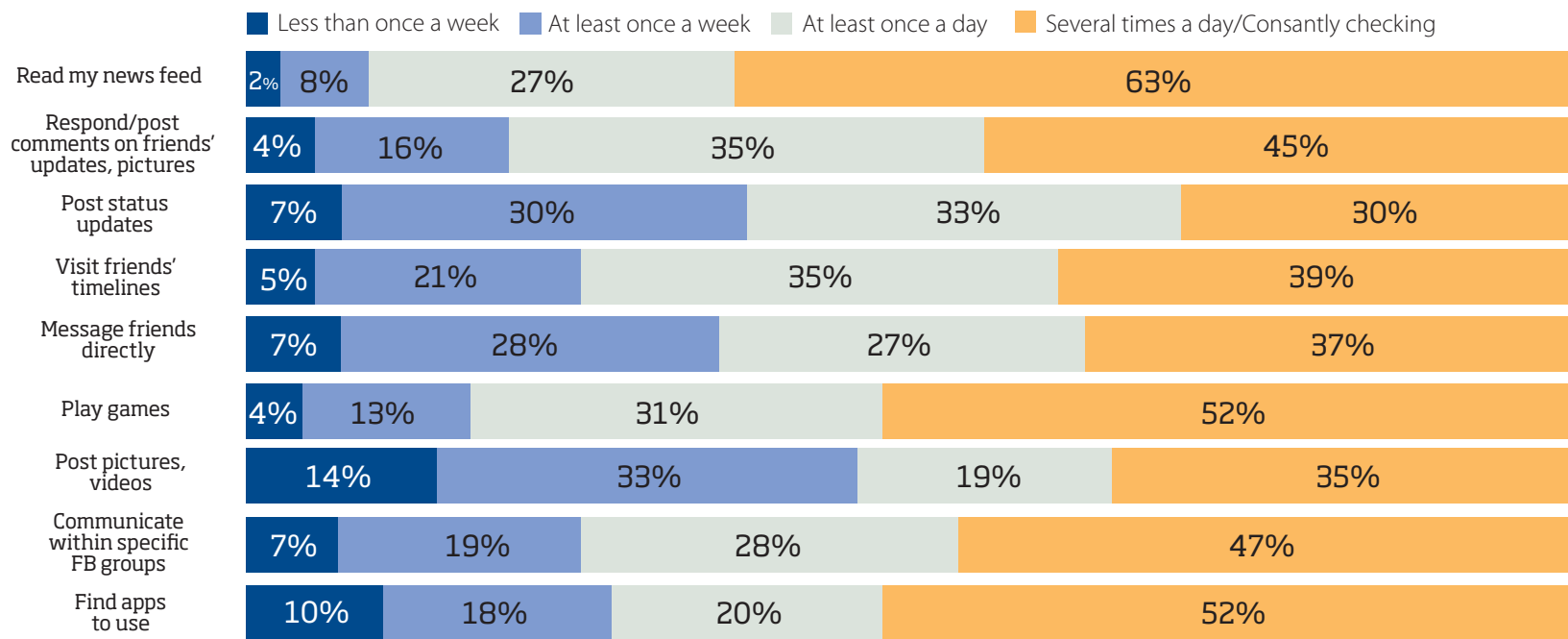
Who We Are Most Connected To Smartphones + Facebook


While only a modest percentage use Facebook to connect to their community, those that do agree most strongly that the social network plays a very important role in doing this. This demonstrates the growing opportunity for Facebook Pages to connect people and various communities, organizations and brands.




Facebook Usage On Smartphones

Beyond using Facebook’s various methods of connecting with our friends, Facebook drives engagement through games and application discovery.



 **75%** Men are 75% more likely than women to seek out applications on Facebook

 **2x** 18-24 year olds are 2x more likely to seek out applications on Facebook than 40-44 year olds

 **30-34**
40-44 30-34 & 40-44 year olds are most likely to play games on Facebook



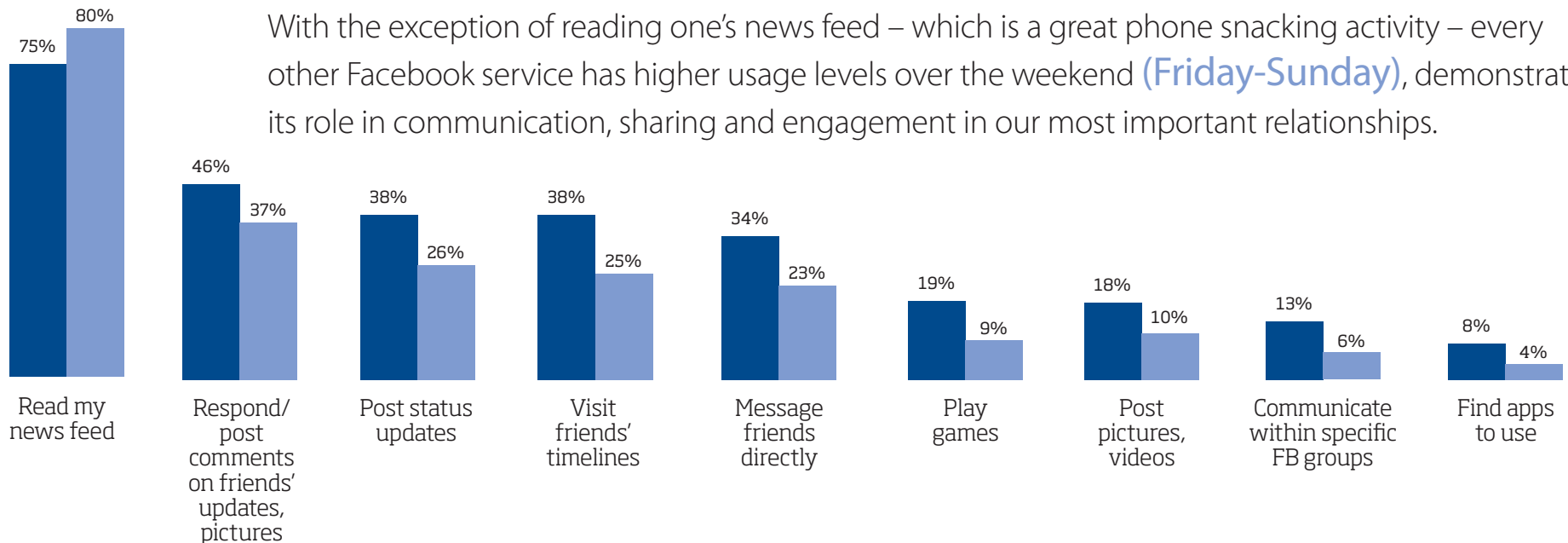
Using Facebook Helps Us Connect & Stay Connected

Facebook ranks as a top 3 activity done on smartphones. **70%** of respondents use it. Among these Facebook people, **61%** use it each day. Reading one's news feed is the top activity at **77%**.

18-24 year olds use more services on Facebook, especially directly messaging with individuals and groups and sharing pictures and videos.

With the exception of reading one's news feed – which is a great phone snacking activity – every other Facebook service has higher usage levels over the weekend (**Friday-Sunday**), demonstrating its role in communication, sharing and engagement in our most important relationships.

■ Weekend
■ Weekday



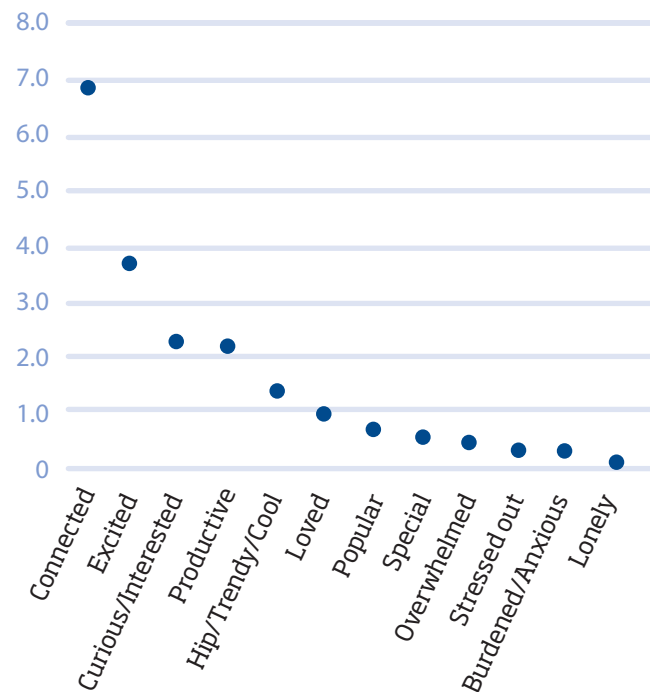
How We Feel With Constant Communications In Hand



We asked smartphone owners how an array of social and communication activities on their phones made them feel. Given most of these people use **7.4** social/comms applications on their phones, we may expect that many respondents would feel overwhelmed with the flurry of activity, alerts and notifications.

The research shows that the *overwhelming sentiment* from all this mobile activity is one of **connectedness**, rated at **6.9** on the Relative Sentiment Scale. Excitement is a distant second at **4.1** and after that, the next most common feelings were curiosity and productivity, each hovering around 3, or less than half of the level of feeling connected.

Relative Sentiment Index

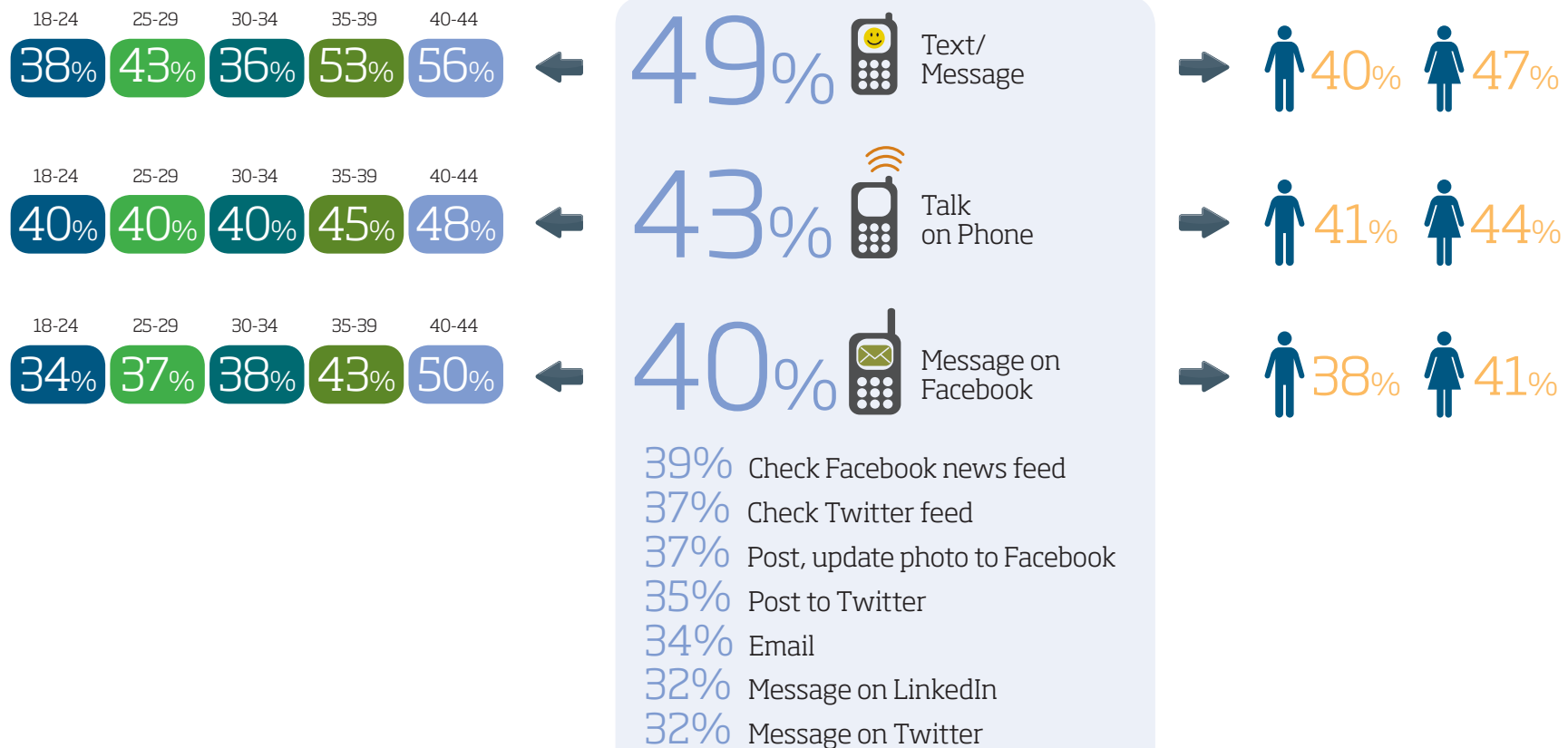


How We Feel

Smartphones Are Important Tools for Keeping Us **Connected**

Most of the activities we asked about generated relatively high rates of connectedness vs other sentiments.

The top ten activities that generated the highest levels of connectedness are:



How We Feel: Smartphones Are Important Tools For Keeping Us Connected

After connectedness, the next strongest sentiments we feel are: Excitement, curiosity, and productivity. Social networks drive these feelings more than traditional means of communication.



Excitement

- Post photo on Instagram 34%
- Post update on LinkedIn 27%
- Direct message via Twitter 26%



Curiosity

- Check Facebook news feed 25%
- Check Twitter feed 22%
- Check Instagram feed 20%



Productivity

- Calendar 34%
- Email 27%
- Text/Message 16%

In Conclusion

The mass market has embraced smartphones and social media and we expect adoption to continue. Facebook is used by 70% of Android phone and iPhone owners, dominates time spent communicating on the phone, and drives the greatest levels of connectedness among the popular social networks.

While some differences clearly exist across demographics, the value smartphones and specifically social on smartphones delivers is universal.

Smartphones have revolutionized how we communicate, socialize, share and connect. The immediacy and intimacy we have with our phones enable much more fluid and near-constant social interactions, whether these are short snacking sessions where we read our news feeds or more engaged private

messaging conversations between two people or among a group.

These exchanges are driving very high levels of connectedness among smartphone users and with those they care most about. This increased sense of connectedness is the primary reason we use these technologies with the frequency and duration that we do.

As more mobile devices—even beyond smartphones—are adopted, social, sharing and communications will expand even further than where we are today, enabling people to engage, discover and interact in wholly new ways.



Methodology

IDC conducted an online survey of 1,000+ 18-44 year old iOS and Android smartphone owners in the U.S. each day for 1 week (Friday-Thursday) in March 2013, for a total number of respondents of 7,446.

This study was designed to understand how smartphone owners use their phones over the course of a day, with an emphasis on social and communication applications and services. While we asked about broader application categories the respondent used on their smartphone, most questions focused on a subset of communications and social applications and services. In various instances, we combined activities to assess those that are more active (creation) vs those that are more passive (consumption) or combined various activities by social network.

IDC found that during Tuesday through Thursday, 18-24 year old respondents were underrepresented. In order to correct for this, as well as to have our study reflect the current installed base of smartphones, we've weighted the data by both age and operating system.

Contact Information

IDC

Danielle Levitas

dlevitas@idc.com

650.350.6487