



MOBILE SOCIAL NETWORKING:

A Cross-Country Survey of myGamma Members

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Executive Summary

Less than three years ago, BuzzCity launched myGamma in three Southeast Asian countries. Today the mobile social networking service is accessed daily by some two million users from sixty countries on four continents.

While we have conducted market research and interviews with users before, this report documents our first simultaneous multi-country survey of myGamma members.

The results largely confirm our business model and reinforce our drive to offer users more ways of forming and interacting with communities on the mobile internet. Key take-home points are:

1. Across all markets, myGamma is accessed primarily by users via mobile devices.
2. But myGamma members are usually at home or at work when they go online. Even though they are using a mobile device, they are not on the move.
3. The most common reason for using myGamma is to communicate with friends.
4. myGamma members also extend their social networks across age groups and geographic boundaries.
5. Usage is spread throughout the day, but the most popular time to access myGamma starts in the early evenings and continues until past midnight. While the peaks vary by country, lunchtime is the least active period across the board.

6. More than 90 percent of those surveyed access myGamma on a daily basis. Half of our users go online more than five times a day.
7. Sixty percent of respondents spend thirty minutes or more on myGamma each time they log in.
8. While e-commerce is not the primary reason for using myGamma, 35 percent of our members have made a purchase online. Rich media content – games, ring tones, wallpaper images, etc. – is popular.
9. Virtual goods are a fast rising sales item. They are also a networking tool as users often purchase virtual goods as gifts for online friends.

Future versions of myGamma should feature more networking tools that enable members to build online communities and create links between them.

1. Background

myGamma is the world's largest mobile social networking service. More than two million members from 60 countries (as of November 2007) interact in moblogs, forums, testimonials and games. BuzzCity, a leading developer of global wireless communities and consumer services, initially deployed myGamma in Singapore, Malaysia and Thailand. Today, the service is also available in Africa, Europe, North America and the Middle East. On average, another two countries come online each month.

People who use myGamma generally have limited or no access to computers. These "unwired" consumers live in emerging markets or work in the blue collar sector in wealthier nations. Mobile phones provide their primary access to the Internet. Widespread and affordable wireless access has helped spark rapid growth in the number of people using the wireless Internet and the amount of time they spend on it.

BuzzCity originally conceptualized myGamma as a messaging tool for WAP media on mobile devices. The service has evolved to include community centric tools (discussion groups, blogs, photo albums etc) and in-session games and activities. Like other social networks, members interact via personal profiles, in games and chatrooms. Profile pages contain biographical information, friends' lists and postings.

daveyboy (online)

 UID: 1761888
 Country: South Africa
 Location: KwaZulu-Natal
 Gender: Male
 Race: White
 Age: 39
 Brief Intro: life is to short,so enjoy it and live it with all you have and with as many friends possible.
 Last Login: 1247pm
 Photo



[Add/Block](#)
[Chat with daveyboy](#)
[Who added him?](#)
[Testimonials \(19\)](#)
[Hall of Fame \(42\)](#)
[Life Level 4](#)
[Friend List](#)



Registered members enjoy the full use of the service. They can create wap sites, comment on each other's photos and blogs, join or start a discussion forum and play in-session games like Gammalife. Visitors meanwhile have more limited browsing access. They can view member-created wap sites, the Hall of Fame (a weekly picture voting activity) and portions of member-created discussion groups.

BuzzCity is committed to providing services that are relevant to myGamma's members and their lifestyles. This is particularly important as myGamma grows in existing markets and expand to new ones.

2. Objectives

The primary objective of this survey is to understand how members use social networking services and the activities that social networking motivates. This is the first multi-country survey of myGamma users undertaken by BuzzCity.

Previous surveys have been conducted in individual markets. However we believe a simultaneous multi-market survey was needed to

- Identify new membership trends and
- Enable direct comparisons between markets.

BuzzCity's engineering and design teams will use the survey results as a guide to construct the next version of our social networking platform, myGamma 2.0. With a better understanding of user behavior, BuzzCity can deliver services that are fresh and relevant to myGamma members.

3. Survey Methodology

The survey was kept short to cater to the media of choice, the mobile internet. Participants were asked eleven questions: ten multiple choice plus one open-ended response.

The survey was conducted in nine countries from September to November 2007. Text banners placed on various myGamma pages publicized the survey to members. When clicked, the banner ads directed users to the survey questionnaire. To minimize intrusion, the advertising server was set to ensure that a member saw the ad no more than five times.

Only myGamma members could participate. Each respondent was allowed a single response. No incentives were offered in exchange for participation. 875 myGamma members responded to the survey.

Critical in the data collection process was the selection of countries. myGamma is available to users in more than 60 countries and selection was influenced by several factors.

Thailand represents a long established market and together with South Africa presents a common known baseline of steady growth and heavy user participation with well observed usage patterns.

India was selected because it has the highest membership growth in absolute terms. During the survey period alone, 45,000 new members joined myGamma in India. If there are major changes in user behavior, we expect to see them first among Indian users.



Kenya, Nigeria, Romania, Tanzania, the United Kingdom and the United States were chosen for their economic and geographic diversity. These six countries are also all relatively new markets for myGamma and all are showing a strong uptake of the service.

The following table shows the countries where the survey was conducted, listed in order of membership size.

Country	Total Members	myGamma Launch Date	Number of Survey respondents
India	542,900	2005	131
South Africa	331, 100	2006	113
Thailand	110,700	2005	152
United States	61,900	Early 2006	82
Nigeria	49,500	2007	102
Kenya	49,500	2007	104
Romania	34,400	Q3 2006	106
United Kingdom	13,500	Early 2006	39
Tanzania	3,900	Early 2007	46

In the final qualitative analysis, results from previous lifestyle surveys have also been considered, as have semi-structured interviews and observations expressed by members to myGamma customer service personnel. When possible, survey responses have been corroborated with data from our servers.



Abstracts from previous surveys have been reported in pen profiles published in Gamma Life, BuzzCity's corporate blog (<http://gammalife.blogspot.com>).

4. Survey Results

How do you get online?

Ninety-one percent of respondents typically use a mobile device as their primary means to access myGamma and the mobile internet. The 9% who access myGamma from a PC are mainly from Nigeria, South Africa, Tanzania and the United States. This result is consistent with previously surveyed users and is also reflected in our server logs. The key finding here is that **mobile internet users and fixed-line internet users do not belong to the same demographic.**

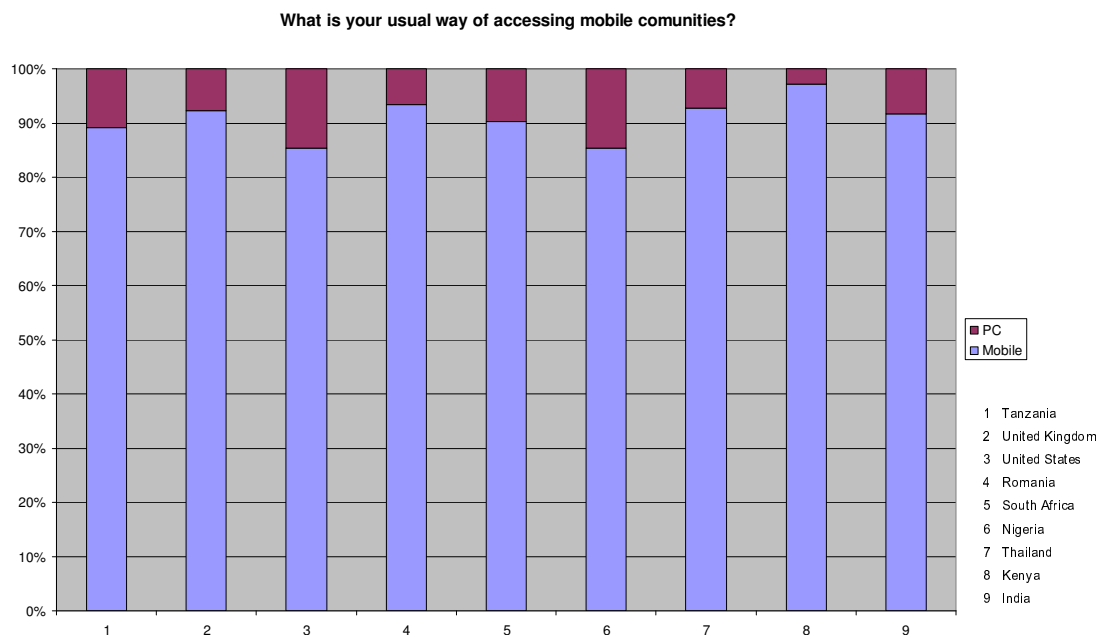


Chart 1

How often?

In each market, more than 90% of those surveyed use mobile social networking at least once a day. More than 50% are engaged in mobile social networking more than 5 time a day. This corresponds to previous observations of member behavior. Members return regularly throughout the day to check messages left by friends. The frequency of access also explains the shorter session lengths observed in Chart 3 (see next page).

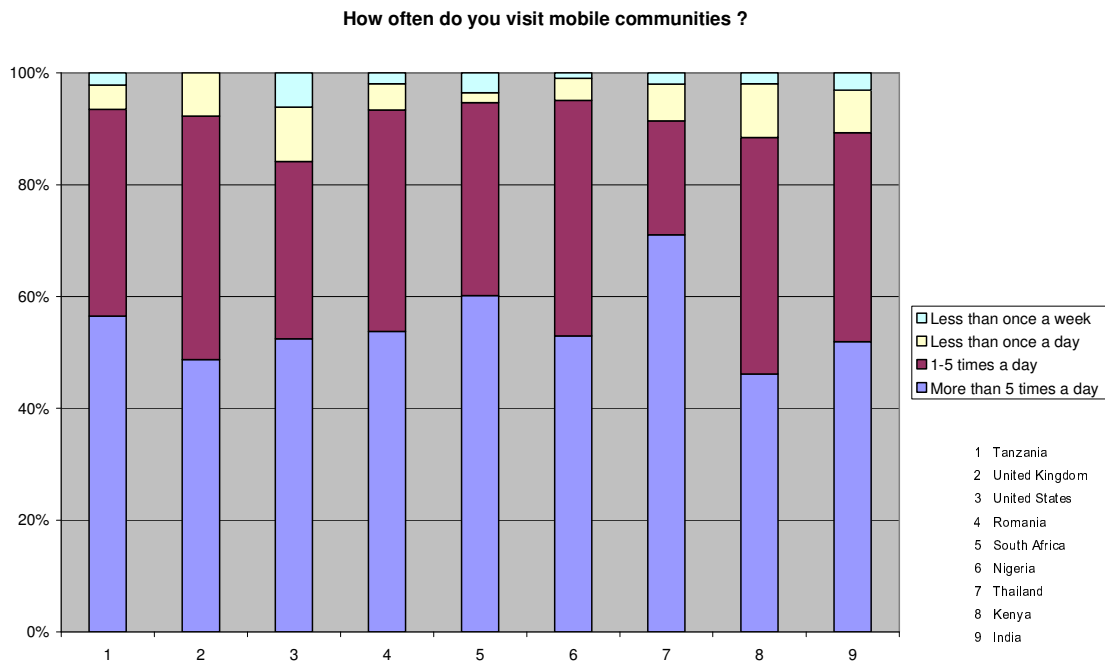


Chart 2

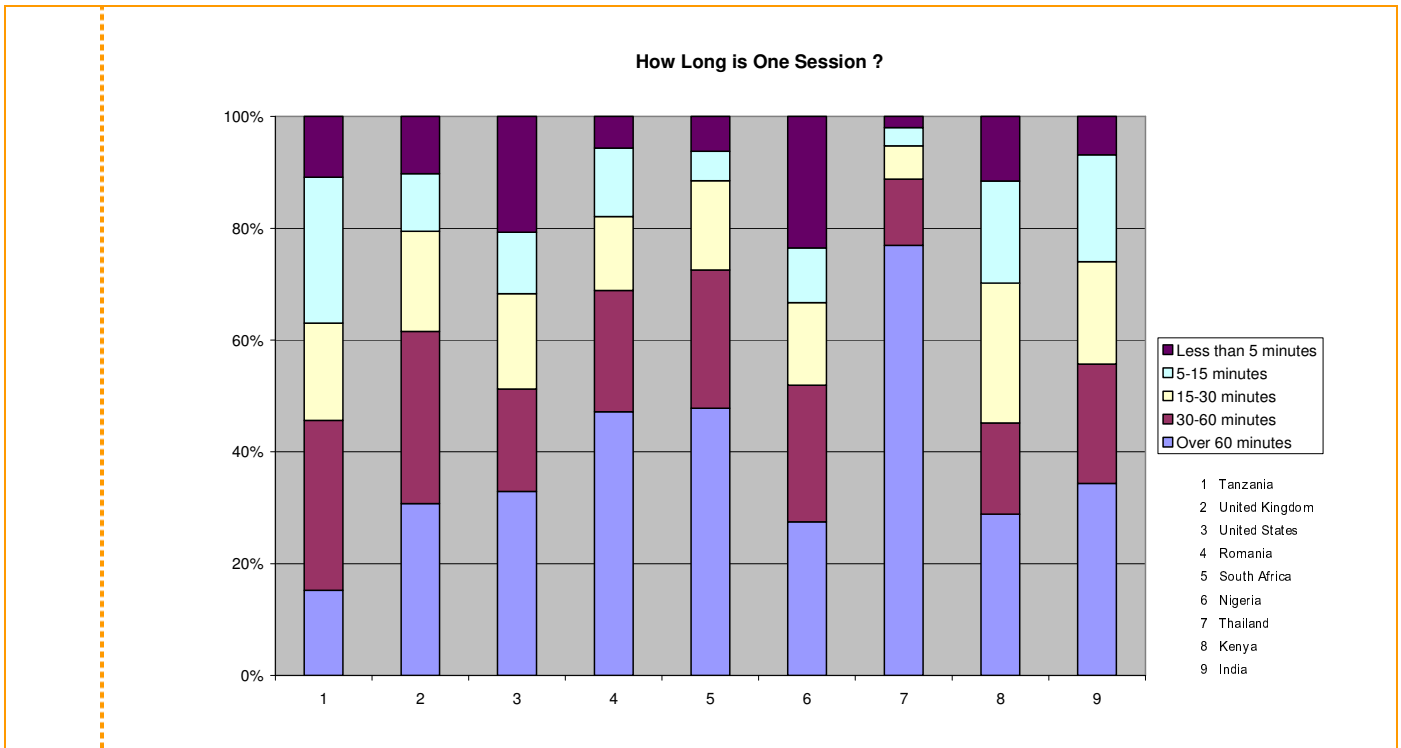


Chart 3

How long?

Nearly 62 percent of respondents spend thirty minutes or more on myGamma each time they log in. This is true in four of the nine countries (Romania, South Africa, UK and Thailand.) In Thailand, three-quarters of the respondents spend more than one hour online at a time.

Where are you?

myGamma members are generally NOT on the go when they access myGamma, even though they use a mobile device to get online.

In eight of nine countries surveyed, more than 60 percent of respondents are at home when they access mobile communities. More than 80 percent are at home, at a desk or at work.

Only 8 percent are in transit when they go online. Romanians, Thais and Kenyans are the least likely to surf on the go. In India, Nigeria, South Africa and the UK, 11% access the service while mobile. Access from internet cafes meanwhile accounts for less than one percent of all activity.

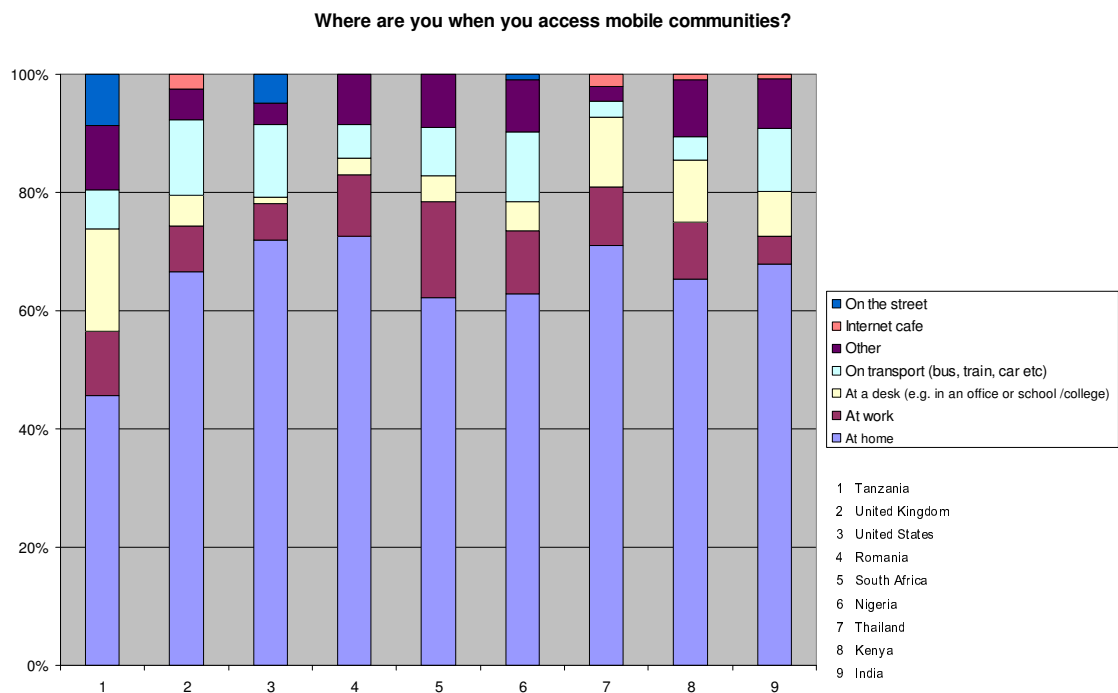


Chart 4

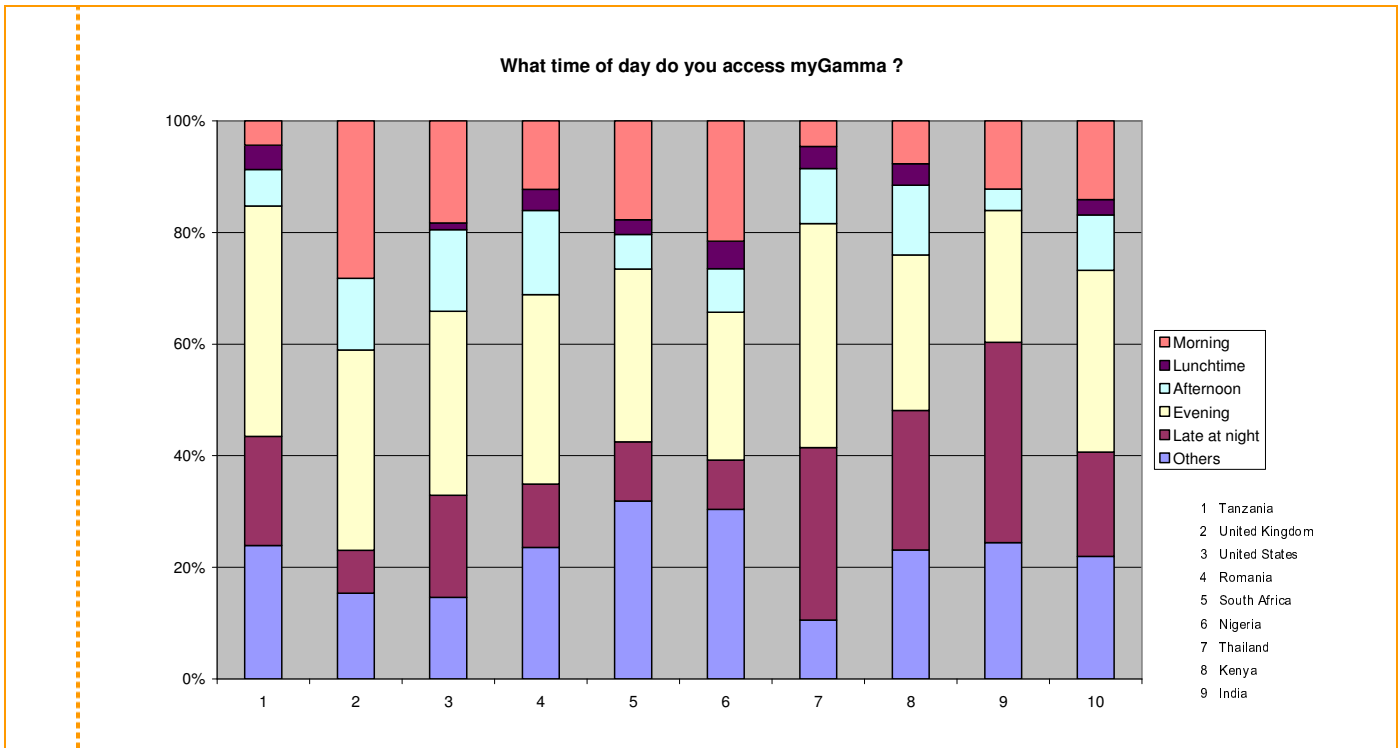


Chart 5

What time of day do you go online?

Peak hours vary by country, but most users tend to go online from the early evening to past midnight. Usage is spread throughout the day, but there is a distinct break at lunch time.

Clearly, the lunch hour is for eating, not surfing. In Nigeria and the UK, users are more likely than others to start surfing in the mornings. There are more night owls in Kenya, India, Tanzania and Thailand.

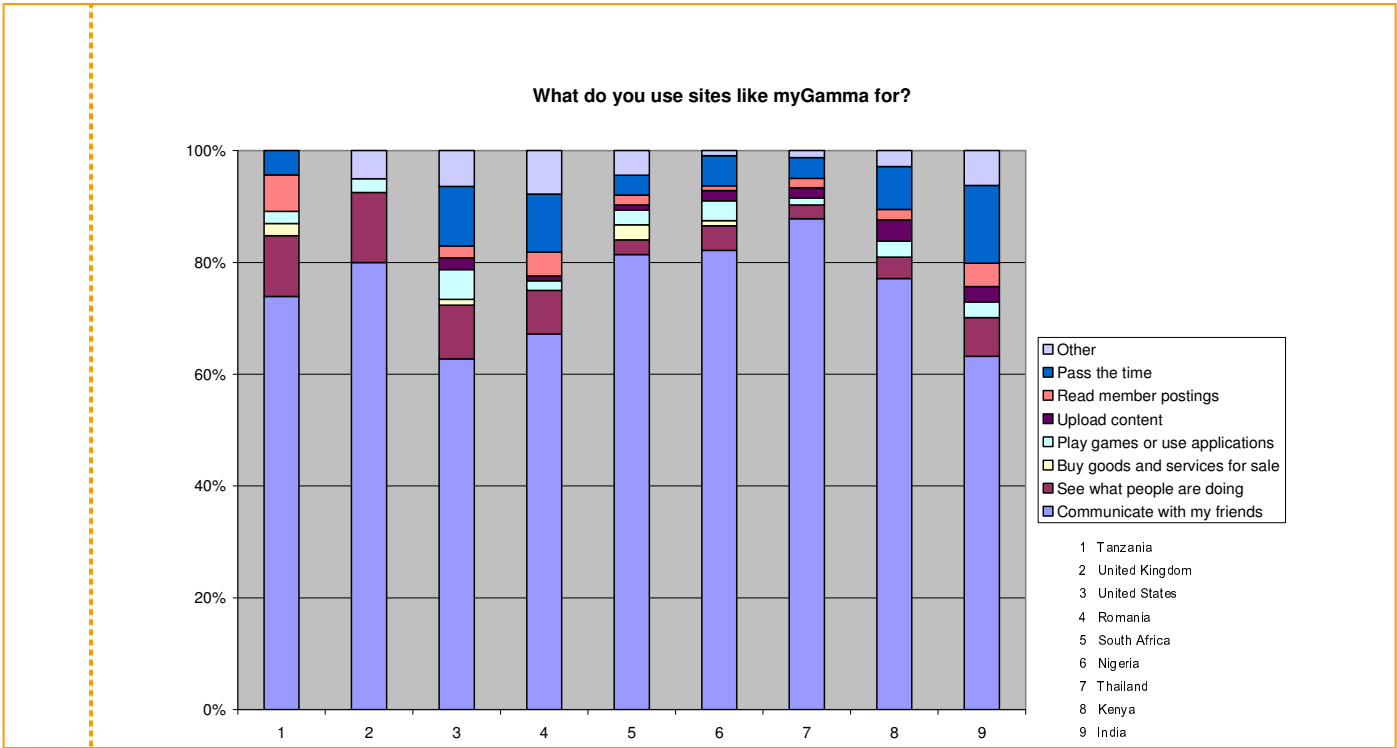


Chart 6

What do you like to do online?

By far, the most popular reason members use our mobile social network is to communicate with friends. Seventy-five percent of respondents said that “communicating with my friends” is why they go online. Other replies include “see what people are doing” (7%) and “pass time” (7%). These results are re-affirmed in our server logs where users participate heavily in networking-related functions (chat, discussion groups, searching for friends, browsing profiles and checking myGamma messages). Otherwise, members generally spend idle time uploading content, reading member posts or playing games.

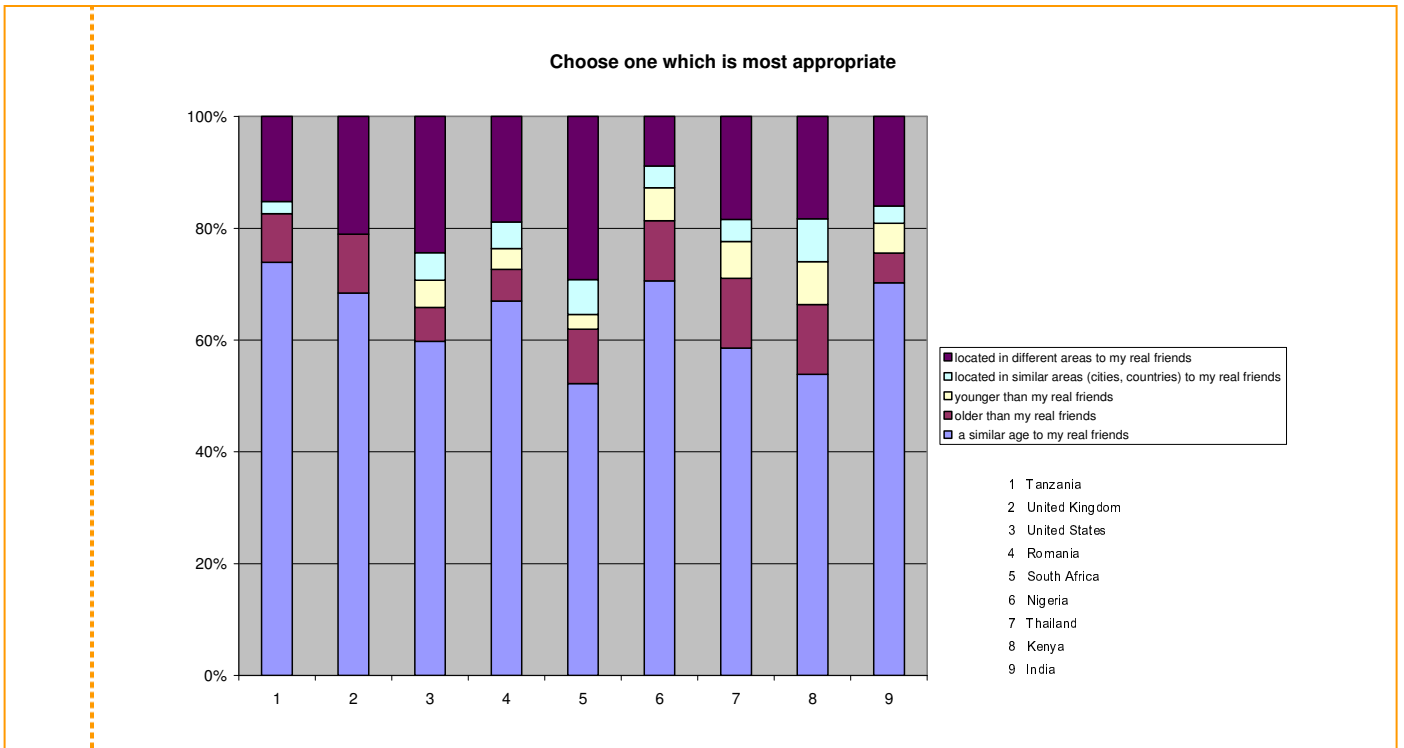


Chart 7

What's the relative age and location of your myGamma friends?

Respondents say that virtual friends tend to be from the same age group but often from a different geographic area as themselves.

How often do you communicate with your myGamma friends?

Members have an active "virtual" life. Nearly 59 percent communicate with myGamma friends as much or more often than with their "real" friends. In Nigeria, Romania and the UK, the percentages are slightly lower. About 44 percent of users in these three markets say they spend less time with their online friends than with real ones.

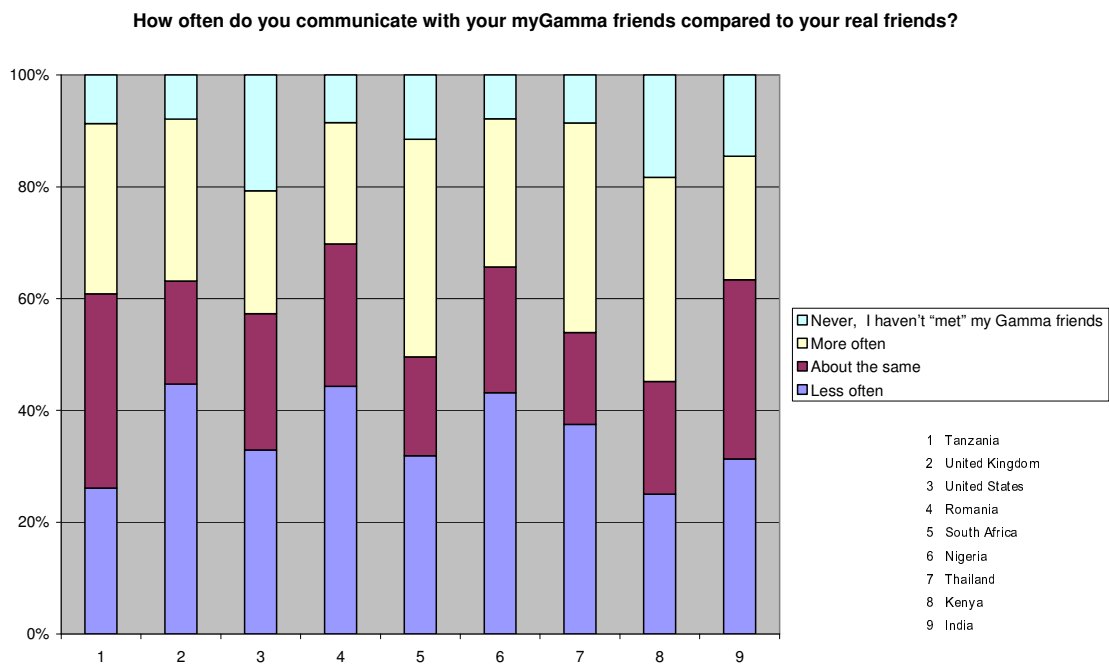


Chart 8

Based on our interviews with members, we know that there is also an overlap between virtual and real-life friends. myGamma users often communicate online with people they already know.

What do you buy?

Thirty-five percent of respondents have bought products online. South African and Thai members are particularly active buyers. This likely reflects the ease of WAP billing in these markets (rather than the propensity or lack thereof for making purchases in other locales.)

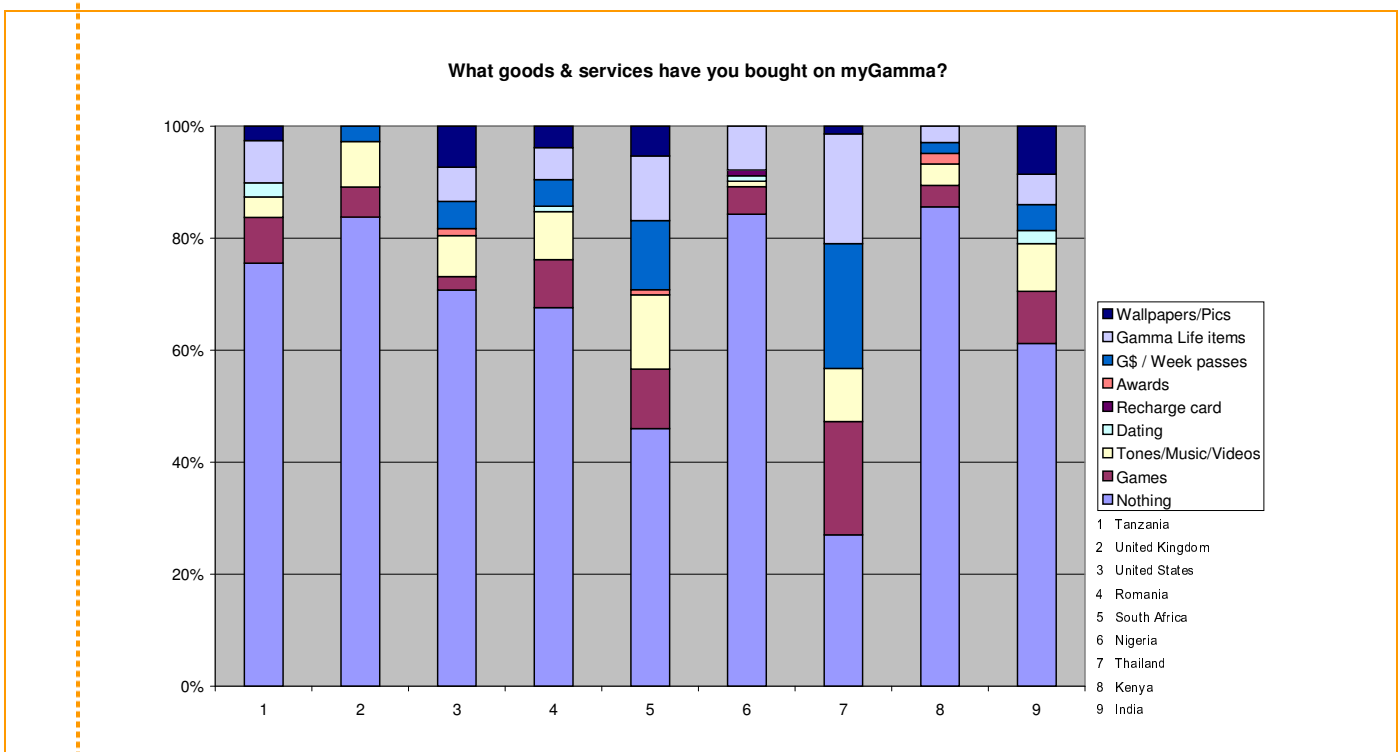


Chart 9

Virtual items – like Gammalife shoes, clothing and accessories - are the single most popular purchase. In Gammalife, these virtual goods are not only a consumer product; they’re also a networking tool as they are primarily purchased as gifts for online friends.

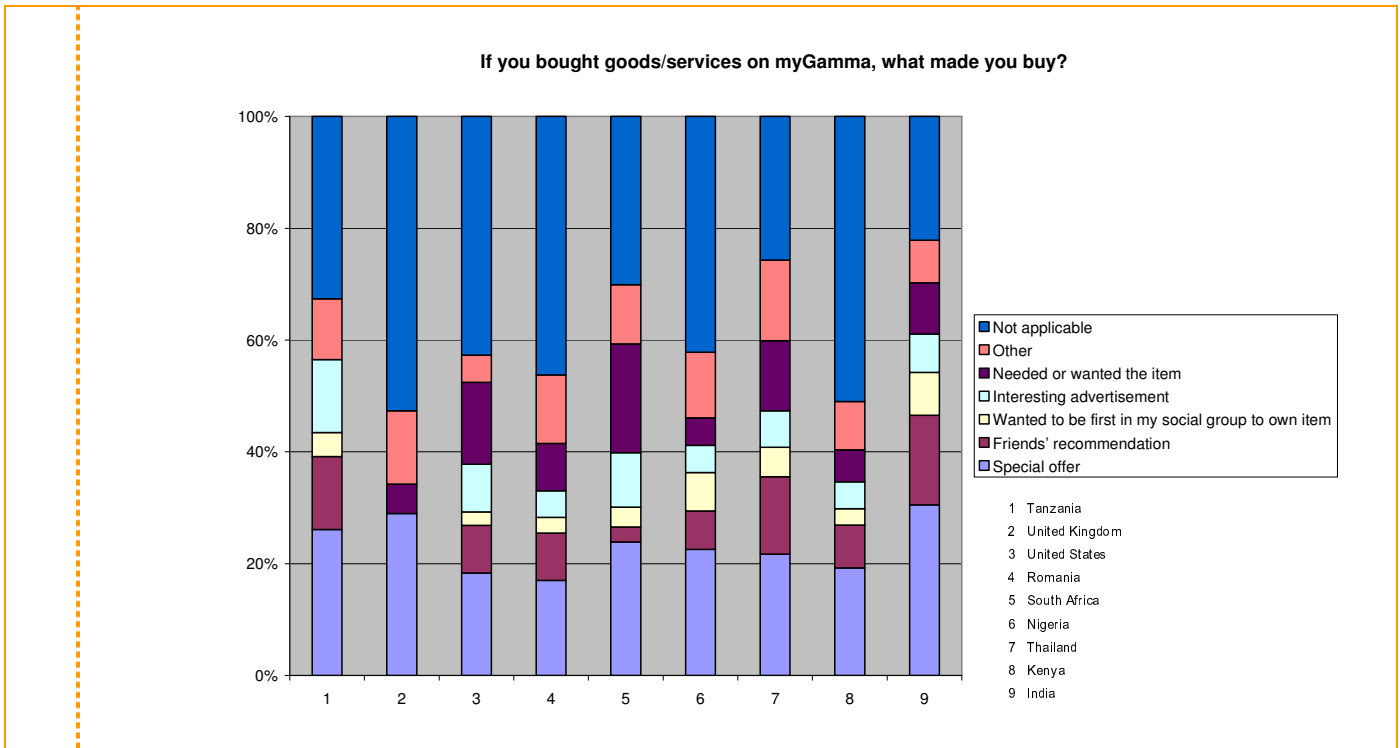


Chart 10

What encouraged you to buy?

Members in all countries are responsive to special offers. Twenty-three percent of respondents say they made a purchase as a result of a special offer. Other factors influencing purchases are need (10%), friends (9%) and advertisements (7%).

What else do you like to do?

Twenty-three percent of respondents say that outside of myGamma they spend most of their time watching TV and films. Twenty percent list offline social activities like sports and meeting friends. Nearly one-third of members though say that they spend most their time at work or school.

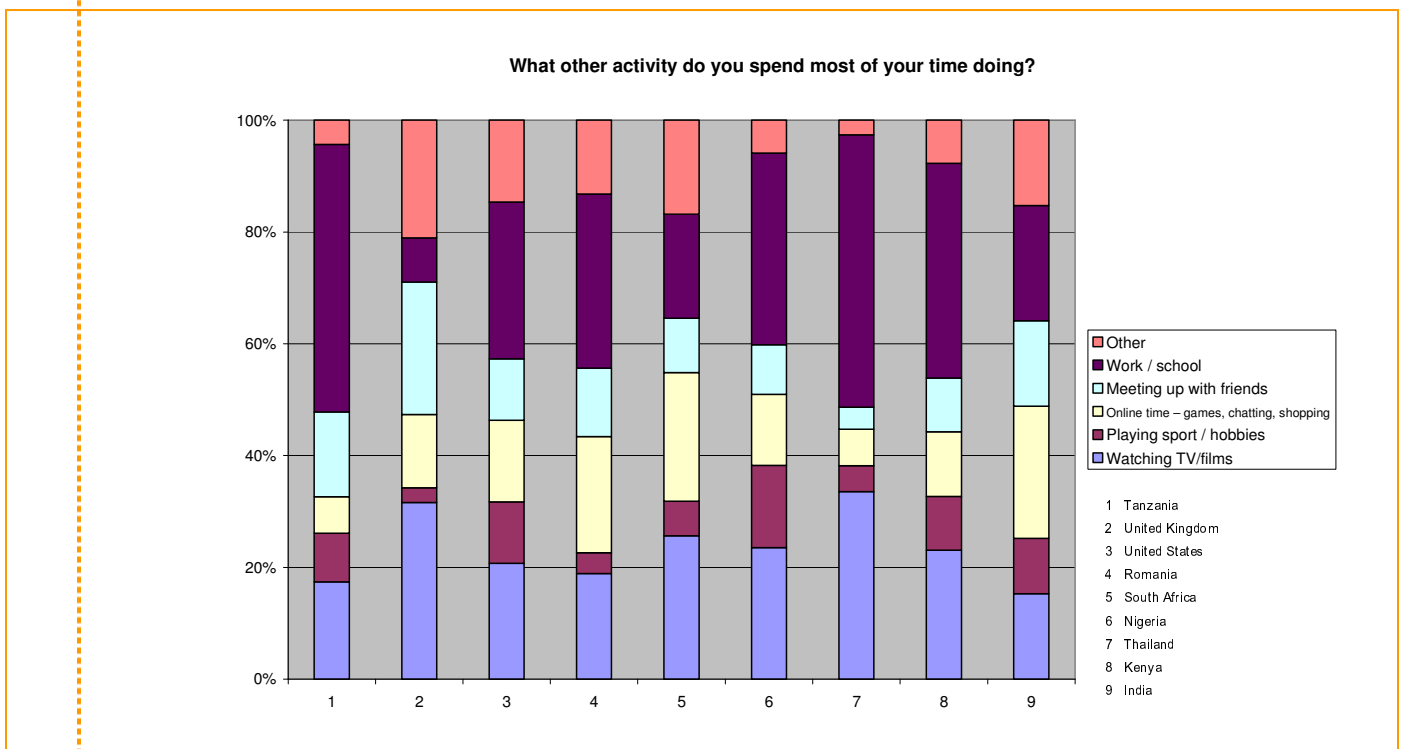


Chart 11

Country Profiles

Kenya

- Almost all Kenyans connect from a mobile device. Only 3 percent use a computer to access myGamma.
- 54% connect less than 30 minutes.
- 86% have never bought anything on their mobile.
- Kenyans have less free time than users in other countries. 38 percent list work/school as their main activity, as opposed to 28 percent on average elsewhere.

Perspective: The low level of online commerce is likely due to the lack of a reliable billing method.

India

Indians most perfectly fit the image of an average mobile social networker. The only major difference is that more respondents list “passing time” as a reason to go online (14% vs. 7% on average).

Nigeria

- 95% of Nigerian users connect at least once a day.
- But they’re online for a shorter period (47% connect for less than 30 minutes).
- 35% connect during the day (compared to 25% on average elsewhere).

- 82% go online to communicate with friends.
- Virtual friends are the same age as real life ones.
- But Nigerians spend more time communicating with friends offline than on.
- Only 16% have bought an item online.

Romania

- 72% of Romanian users stay online for more than 30 minutes.
- 71% connect from home.
- 33% connect during the daytime.
- Meeting friends is their main goal (65%).
- But 11% go online to pass time (higher than the average elsewhere.)
- 20% of Romanian users spend more time communicating with online friends.
- But 44% communicate more with their offline pals.

South Africa

- 96% of South African users connect everyday to myGamma.
- 72% spend more than 30 minutes online.
- Online time is almost as important as watching TV or films.
- They spend equal amounts of time with online and offline friends.
- And they spend more time on the mobile internet than on their “regular life” activities (work/school).

Tanzania

- Only 45% of Tanzania users spend more than 30 minutes per session
- Tanzanians connect more from a desk, at work and school than in other countries (17% vs. 9% on average).
- 74% connect with people of the same age.

Thailand

- 95% of Thai users stay online for more than 15 minutes
- 76% are online for more than one hour.
- 71% connect from home after work.
- Survey respondents say they spend more time communicating with online friends than offline ones. Virtual friends are often a different age than real life friends.
- Thai users remain active despite heavy work and school commitments. 49% say work/school is the activity they spend the most time on (as compared with 27% on average elsewhere.)
- 73% have purchased an item online.

Perspective: Reliable billing methods make it easy for Thai users to purchase items online.

United Kingdom

- Users in the UK are the most likely to connect “on the move”
- But 87% of respondents are still at a fixed place when they go online.
- 80% connect for more than 15 minutes per session.
- 28% go online in the morning, the highest figure in our survey.

United States

- US users are the most likely to connect to myGamma from a computer (15%)
- 72% connect from home (as compared to 62% on average elsewhere).
- 20% of US users connect for less than 5 minutes
- 10% use myGamma to pass time (as compared to 7% elsewhere)

5. Conclusions / Recommendations

While this survey was conducted across a variety of markets – in Africa, Asia, Eastern Europe, North America and Western Europe – there are a number of trends that are consistent across all markets:

1. Mobile internet users prefer to use mobile phones to access the internet.
2. Usage of the service is regular and daily. And for 40 percent of myGamma users, session lengths last for an hour or more.
3. Even though myGamma members are using mobile phones to connect to the Internet, their access patterns are similar to PC users – they connect at a desk, at work and at home.
4. The most popular reason for accessing myGamma is to communicate with friends and extend social networks, mainly but not exclusively with people of a similar age and geographic location.
5. More than one-third of myGamma users have made a purchase online. Over twenty percent of these online consumers were enticed by a special offer.
6. Online purchases are highest in countries where WAP billing is available and relatively simple.

Recommendations:-

1. Introduce additional engagement options – like featured content, featured members, community forums, etc. – that help members extend their online social networks.
2. As most users access myGamma from a fixed location for an extended period of time, games and other content do not have to be designed for users on the go.
3. The most popular activity for users outside of myGamma is watching films and TV. So entertainment moblogs and forums should be popular.
4. Explore more WAP billing options in all markets.
5. Introduce more gifting options, including branded virtual merchandise. Encourage and enable members to give virtual gifts to expand and solidify their mobile communities.

Appendices

Typical User Profiles - Pen profiles from gammalife.blogspot.com entries derived from previous surveys.

SHALOM and MABUHAY! October 31, 2007

Almost all of the myGamma users in Israel are migrant workers. And most of the Israeli-based users are women from The Philippines. Thirty-one year old Sandy from Philippines, works as a caregiver in the home of an elderly Israeli who lives alone in Tel Aviv. Sandy has been a myGamma member for almost a year. She particularly enjoys group chats, testimonials (she has 70+) and rankings like the myGamma Hall of Fame.



BETTING ON MOBILE TO WIN, PLACE AND SHOW June 21, 2007



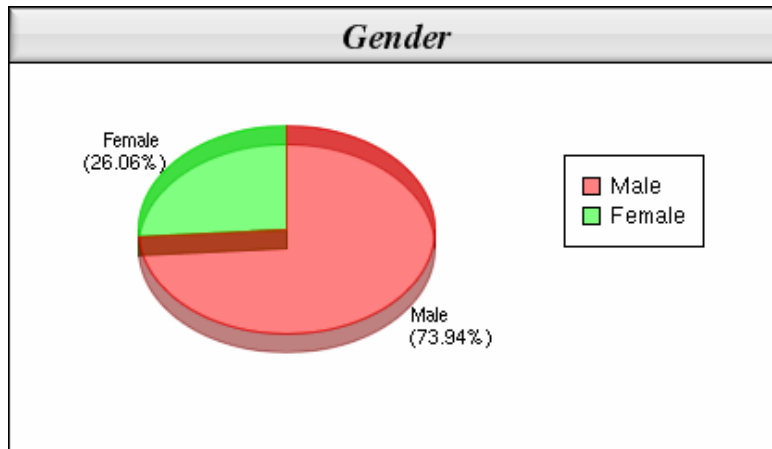
Fifty-year old "Alanleic" is a bit older than most myGamma users, but in many ways he is a typical member of the mobile community. He works as a crossing-keeper, opening gates for cars to pass through, in England's East Midlands.

DEMOGRAPHICS March 30, 2007

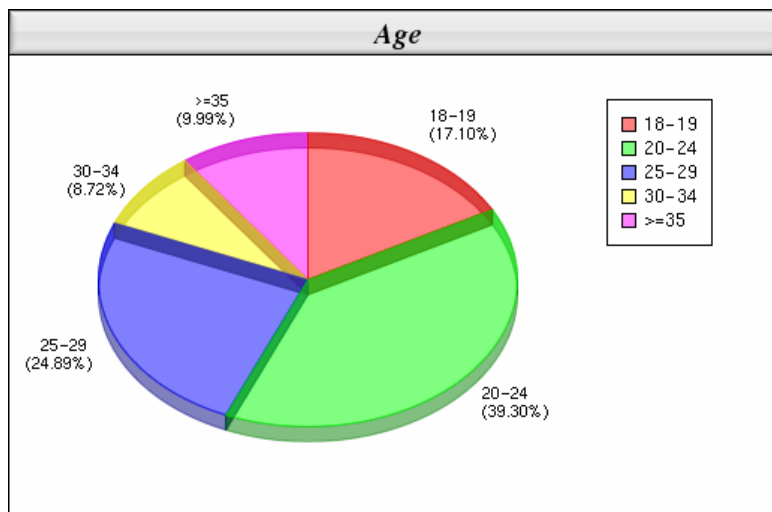
“27-year old “Liton” is a typical myGamma member. He works as an Airport Signal Man at the Sylhet Osmani International Airport in northeast Bangladesh. While Sylhet is a popular tourist destination, there are not a lot of flights in and out of the city each day. So when he’s not directing aircraft, Liton chats on myGamma.



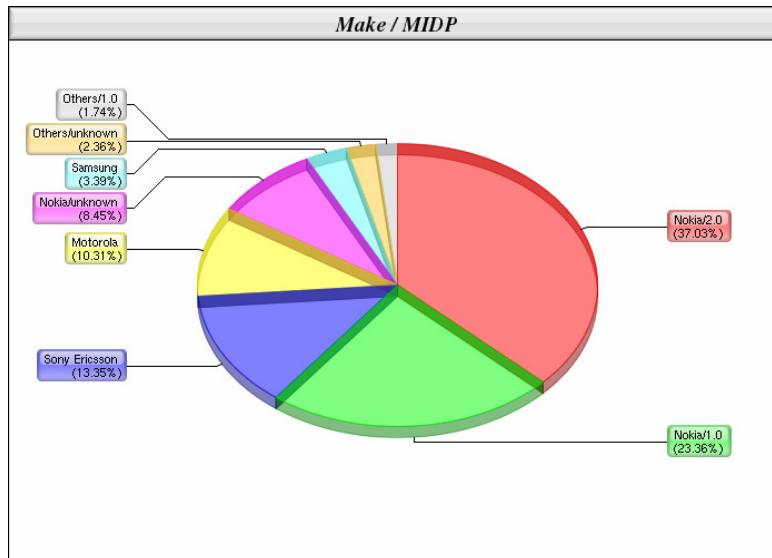
Gender:



Age distribution :-

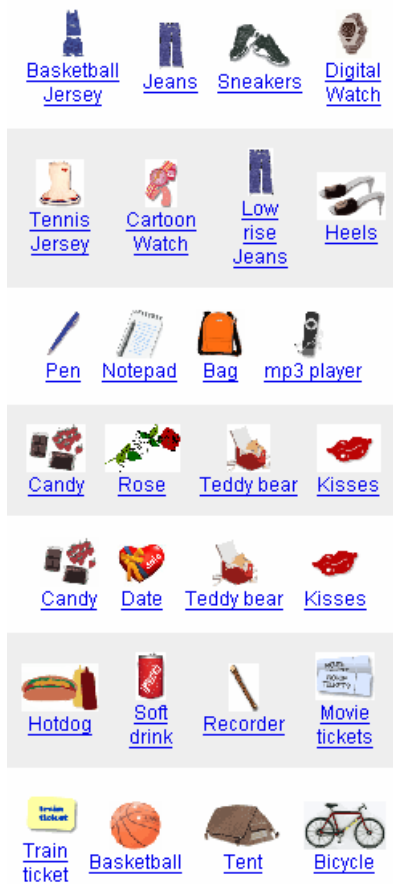


Members access the mobile internet with:-



Gammalife Virtual Gifts

Gammalife is a multi-player online role-playing game that encourages members to interact and trade. At each stage, a player needs to collect five to six virtual goods to advance to the next level. These virtual goods are priced in our virtual currency, Gamma Dollars. Some items are plentiful; others are in short supply. The real trick to Gammalife is that you can't buy anything for yourself. Players also need several friends to advance because at each level another player can only give you two items. Players often team up to advance quickly, but as with reality television, these alliances can shift.



Survey Questions

- Q1 What is your usual way of accessing mobile communities (e.g myGamma)?
PC
Mobile
- Q2 How often do you visit mobile communities?
More than 5 times a day
1-5 times a day
Less than once a day
Less than once a week
- Q3 How long is one session?
Over 60 minutes
30-60 minutes
15-30 minutes
5-15 minutes
Less than 5 minutes
- Q4 Where are you usually when you access mobile communities?
On transport (bus, train, car etc)
On the street
At a desk (e.g. in an office or school /college)
At work
At home
Internet cafe
Other
- Q5 What time of day do you usually access myGamma?
Morning
Lunchtime
Afternoon
Evening
Late at night
Others
- Q6 What do you use sites like myGamma for (select all that apply)?
Communicate with my friends

See what people are doing
Buy goods and services for sale
Play games or use applications
Upload content
Read member postings
Pass the time
Other

Q7 Please read the statements below. Choose the one which is most appropriate. My friends on myGamma are:-
a similar age to my real friends
older than my real friends
younger than my real friends
located in similar areas (cities, countries) to my real friends
located in different areas to my real friends

Q8 How often do you communicate with your myGamma friends compared to your real friends?
Less often
About the same
More often
Never, I haven't "met" my Gamma friends

Q9 If you have ever bought goods and services on myGamma, what have you bought? (#)
Nothing
Games
Tones/Music/Videos
Dating
Recharge card
Awards
G\$ / Week passes
Gamma Life items
Wallpapers/Pics

Q10 If you have bought goods or services on myGamma, what made you buy?
Special offer
Friends' recommendation
Wanted to be first in my social group to own item

Interesting advertisement
Needed or wanted the item
Other
Not applicable

Q11 What other activity do you spend most of your time doing?

Watching TV/films
Playing sport / hobbies
Online time – games, chatting, shopping
Meeting up with friends
Work / school
Other



About BuzzCity

BuzzCity is a developer of global wireless communities and consumer services. Established in 1999 in Singapore, BuzzCity today operates the world's largest wireless community - mygamma.com - for two distinct audiences: the newly connected emerging middle class in developing markets and the blue collar sector in developed regions. These "unwired" consumers are accessing the mobile Internet on their phones due to widespread and affordable wireless access.

BuzzCity provides marketers with unprecedented opportunities to reach this audience via its far-reaching advertising, merchant and publisher programs. Additional information can be found at www.buzzcity.com.