



Analyzing the Indian Subscriber Behavior Towards Mobile Social Media - A Data Monetization & Customer Engagement Perspective

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ABSTRACT

The Indian Mobile Services Industry is going through a paradigm shift in terms of their business model-moving away from a "Voice centric" business to a "Data focused" business. Mobile Operators are looking at new and innovative avenues to increase the data penetration or the contribution of non-voice revenue (currently hovering around 11%) with respect to their overall service revenue. A similar paradigm shift is also being witnessed in the manner in which communication and social interaction happens-with Social Media emerging as a front runner when compared to hitherto popular communication mediums: email and instant messaging service. The immense popularity of social media has attracted advertisers and enterprise users to effectively engage their prospective as well as existing customers using social media. In emerging markets like India, Social Media has been used for customer engagement and monetization.

Every day innovation in the mobile social media space is defining a win-win monetizing model for all the players in the value chain-device manufacturers, technology providers, telecom operators, and social media players. Operators are recognizing the need to investigate the subscriber behavior and aspirations relating to Mobile based Social Media. The extra-large investments in next generation high-bandwidth technologies like 3G & Broadband Wireless Access (BWA) will provide the required momentum to the mobile operators as subscribers resort to user generated content over social media. The paper analyzes the subscriber behavior to ascertain the avenues for customer engagement and monetization using this channel.

Keywords: Mobile Social Media, Social Media Monetization, Mobile Subscriber Engagement Using Social Media

INTRODUCTION

The hype and hoopla around social media and the disruption of the socializing framework has made the Mobile Industry awestruck. Global cues are indicative of the fact that the *web based* social revolution will transcend into the next generation *mobile based* model and the Indian online users have already gone head-over-heels to rewrite history in this space. As Indian Telcos struggle to increase the share of non-voice or data revenue; an effective social media monetization strategy might work to their advantage.

PARADIGM SHIFT IN COMMUNICATION

The popularity and growth of social media has impacted popular communication media like Email and Instant Messaging Service (IM). By 2011, Social Media has emerged as the preferred communication medium

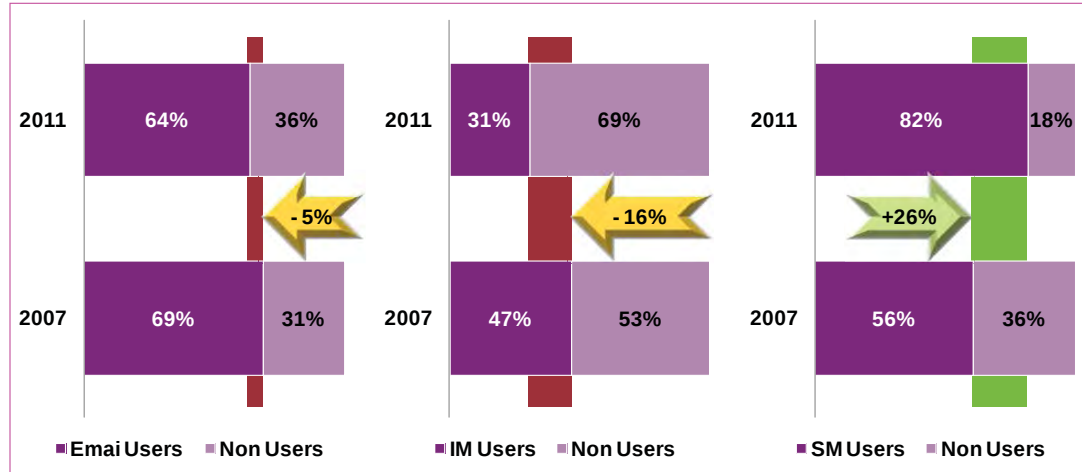
amongst the online users; in the process by uprooting Email from the number one position.

Like we witnessed in the past, that with the increasing popularity of emails, the username to register or sign-in to a new site transitioned from a generic user name to the email id of the user. Similar transition is now being seen with the present day online users who are using their social media username and password to register or login to new (and existing) sites and Apps. The key driver for this phenomenon has been the increase in mobile based social media sites or apps which has been resulted due to the growth of mobile Internet penetration.

Another paradigm shift which is being observed globally amongst the online user community is the preference for mobile devices like Smart Phones, Tablet PCs or gaming consoles as opposed to hitherto popular conventionally Desktops or Laptops. The easy and convenience provided by these mobile devices has enabled the present-day

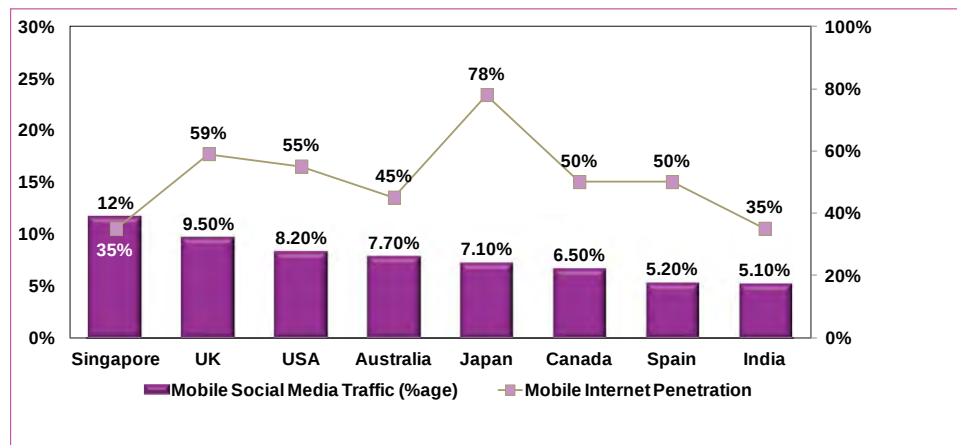


Chart 1: Paradigm Shift in the Preferred Communication Medium



Source: comScore Media Metrix, October 2011

Chart 2: Mobile Social Media Traffic & Mobile Internet Penetration



Source: comScore Device Essentials & Mobi Lens, December 2011

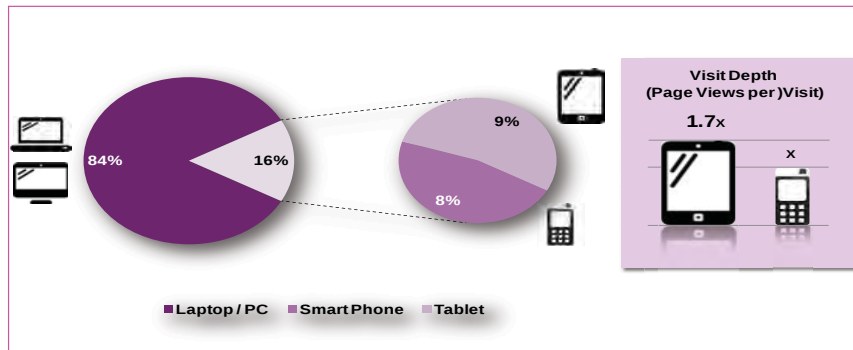
online users towards “*anytime, anywhere*” communication experience. On an average, 16% of the global data traffic is now being generated over mobile devices. While, Smart Phones are much more common; the tablet form factor makes it ideal for browsing. Tablet PCs drive more traffic because online users prefer them for more in-depth visits. Whether it is leisure surfing, watching an engaging video, or online shopping, online users view 70% more pages per visit when browsing with a tablet vs. a Smart phone.

SOCIAL MEDIA EVOLUTION

Social Media refers to the platform which enables digital interaction amongst users in which they create, share,

value add, and exchange information and ideas in virtual networks or communities. A trend that is sweeping all the popular social media sites is the phenomenon to “*Go Mobile*”. The global mobile penetration rate is daring to go beyond the 91 per cent (14 per cent of all mobile users come from India) mark; and has adopted a pace greater than that of the PC penetration. Within a span of 5 years, the preferred choice of communication device (measured based on unit shipments in a quarter) has changed twice: From Personal Computers (PCs) to Laptops to Smart Phones. In 2013, yet another shift maybe observed with the growth of Tablet PCs expected to take-over global sales of Smart phones.

Chart 3: Paradigm Shift in the Preferred Communication Devices



Source: Adobe Digital Index, Global Traffic Share, February 2013

Figure 1: Changing Communication Device Popularity



Source: Reuters (January, 2009), Canalsys (December, 2012) and NPD DisplaySearch (January 2013)

Initially, there were two basic types of mobile social media networks:

- The first is companies that partner with wireless phone carriers to distribute their communities via the default start pages on mobile phone browsers, an example is JuiceCaster.
- The second type is companies that do not have any such carrier relationships (also known as “off deck”) and rely on other methods to attract users.

While mobile web, evolved from proprietary mobile technologies to a full grown mobile Internet access, the distinction has changed for the following two types – the former is referred to as “web based social media networks being extended for mobile access” through mobile browsers and Smartphone Apps. While, the latter is referred to as “native mobile social media networks” with dedicated focus on mobile use while leveraging the

benefits of the mobile technologies and hence are more suited for the carriers. The web based social networks have an edge for having amassed a larger group of users; who may easily be enticed over the mobile platform. The evolution path of social media may be defined across the following generations:

- **First Generation (1G):** Web based Social Media developed over Web2.0 technology
- **Second Generation (2G):** Mobile based Social Media developed over Mobile2.0 technology
- **Third Generation (3G):** Location based Mobile Social Media developed over Location based service technology
- **Future:** The future of the social media is expected to target connect devices and machines and enable a platform for information exchange and interaction.

Figure 2: Social Media Evolution: 1st, 2nd and 3rd Generation



The present generation is also referred to as **SoLoMo** (pronounced as “sow-low-moe”), a portmanteau of Social-Local-Mobile, which represents the convergence in social, local, and mobile media, especially in the context of smart phones, tablets, and/or other mobile computing

devices. To a marketer, SoLoMo is a complete paradigm shift—instead of pushing messages to a user, either through a TV commercial, radio, or online ad, the message is pulled in near to real time as a result of the user’s current location and activity on social media site/apps.

Social media has also emerged as an unavoidable media for customer engagement. Effective customer engagement strategy over social media promotes brand loyalty, enables 2-way communication and feedback mechanism, customer stickiness and retention as also increased sales.

OPPORTUNITIES IN MOBILE SOCIAL MEDIA IN INDIA

India is the second most populous country as well as the second largest mobile industry in terms of subscriber base (next to China on both accounts). However, on the Internet infrastructure front India is a laggard and has to run a mile

Chart 4: Social Media Graph-Worldwide, Asia and India

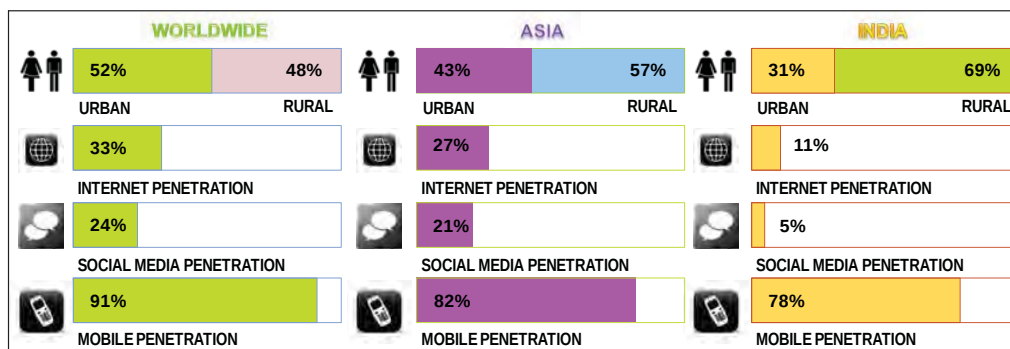
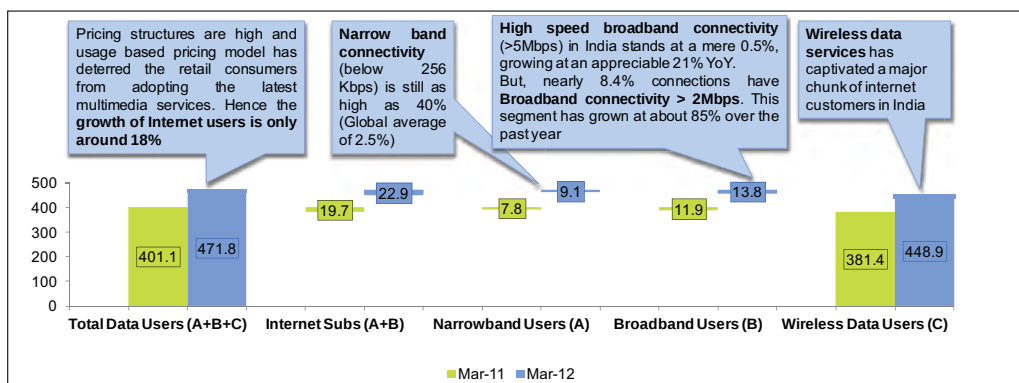
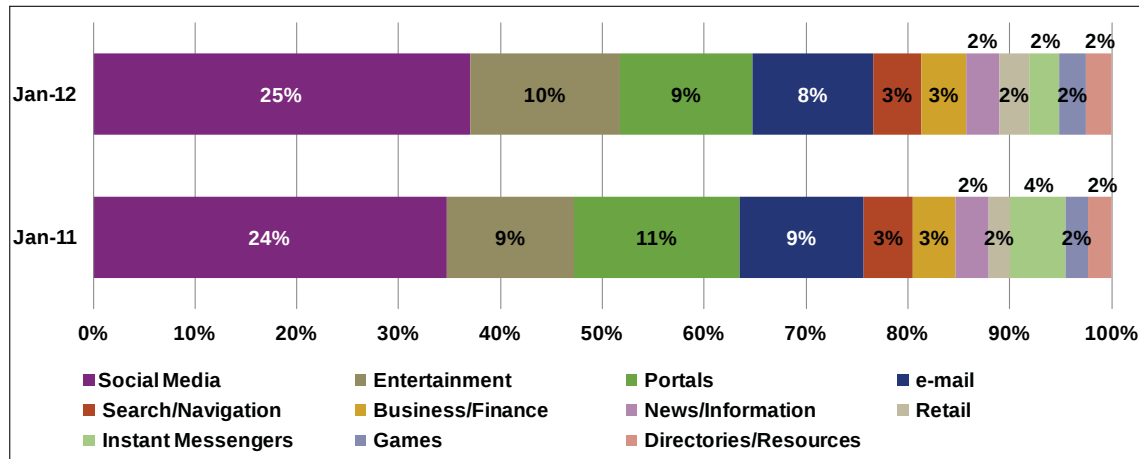


Chart 5: Data Subscriber Growth in India (in Millions)



Source: TRAI (2012), Voice & Data (2012)

Chart 6: Top Online Categories in India by Share of Total Minutes



Source: comScore, Media Metrix, June 2012

to catch the average penetration rates worldwide and even at the Asian level.

Indian mobile subscribers contribute more than 14.5% to the worldwide mobile population; while the social media user population is 3.5% to that of the worldwide social media users.

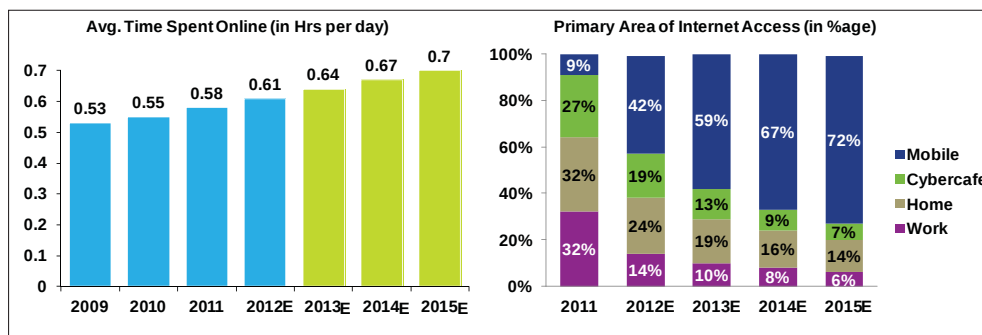
Internet connections in the country have grown at about 16% over 2011, and 85% of the Broadband access is through DSL and merely 4% is through wireless. Wireless data segment has witnessed a high growth of around 18%, somewhat propelled by the increasing data focus and 3G launches in the country. The growing adoption of mobile technology, coupled with data or Internet services, offers a great potential in the mobile social media space. The shift in the online user preference to explore social media over mobile devices makes this a game-changer: an opportunity both for the social media player as well as the mobile operator.

Social media players need to focus their design and strategy around the right device which would be the device of the future. The shift in the device popularity is also evident and Tablet PCs and Smart Phones are set to rule the next generation of technology savvy subscribers around the globe. In India, the smart phone penetration stands around 3% and a smart phone user on an average spends 2.7 hours daily on their devices. As per Nielsen Mobile Insights, every 3 out of 4 smart phone user in India access social media sites. In terms of online usage over home and work locations (excluding mobile Internet

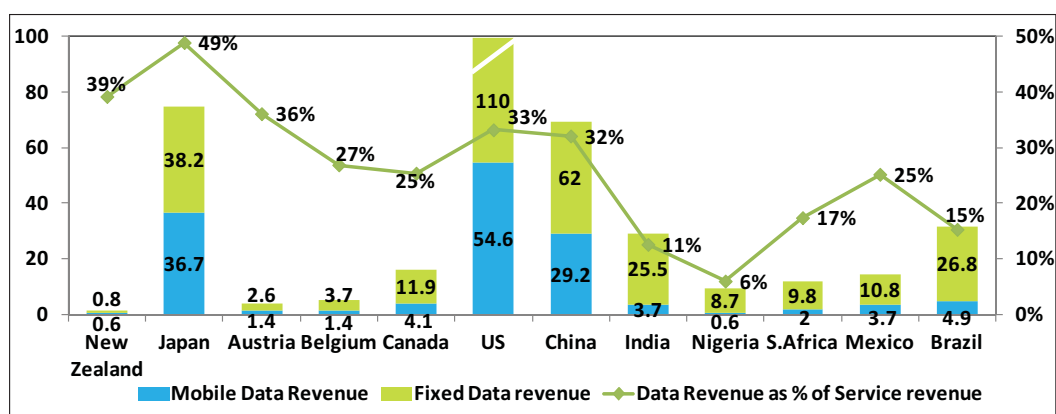
usage), one in four Online Minutes is spent on Social Media sites. This milestone makes India a prospective and valuable destination when it come to social media, as the comparative global figures stand at one in every five minutes of online usage.

The average time spent online per Internet user per day (in Hours) in other countries such as Japan, China and US are 2.9, 2.8, and 2.3 hours respectively; however the same is expected to rise for Indian online user by 27%. The overall time spent online would therefore increase the time spent on social media (taking the present ratio of 1:4). Also a marked difference is being observed in the primary area of Internet access amongst the India online community. As per IMAI I-cube Report 2010-11, the primary access media which used to be the Home and Office Desktops or Laptops, is now transitioning into mobile devices. Increasing Internet usage over the mobile platforms i.e. "Internet on the go" is expected to bring a new wave in usage and applications being accessed especially social media.

Mobile Operators on the other end are facing a paradigm shift in their business model from an earlier Voice driven to Data focused business. Voice and messaging services are facing increased competition and regulatory pressure worldwide (low to negative growth); and the data services are expected to be a key lever for future growth. Global mobile data services revenue; despite lower ARPU is expected to surpass fixed data revenue due to its larger user base.

Chart 7: Average Online Usage and Primary Access Area for Internet in India

Source: IMAI (I-cube report 2010-11), Avendus (India goes Digital, 2011)

Chart 8: Mobile and Fixed Data Revenue Contribution (in USD Billion)

Source: BofAML Global Research estimates, 2012

Across the mobile economies of the world the number of operators in India is the highest (10-14 per operating circle); making it a highly competitive and price driven market. The mobile revenue per minute is one of the lowest (INR 0.20 per minute) and Minutes of Usage (MOU) is on the decline (owing to increased non active subscribers). The shrinking voice revenue is still the maximum contributor (40-50%) towards the overall mobile revenue; the required differentiation in the revenue figures can best be achieved by increasing the percentage contribution from non-voice revenue (currently 11%). Most of the operators therefore participated in the 3G auction in 2010; while others opted for the Broadband Wireless Access (BWA) auction.

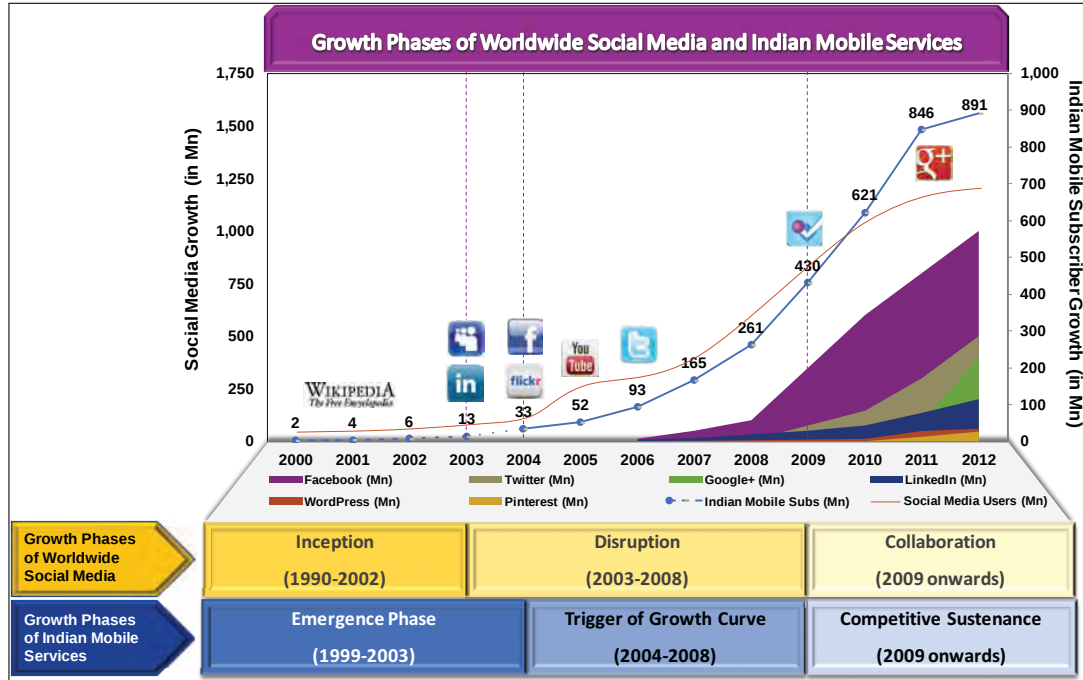
A phased rollout of 3G Services is being carried out by the licensed operators while near 4G (LTE) deployments have also been started simultaneously in select cities by few operators using the BWA license. Wireless is therefore

poised to play a major role in increasing broadband and Internet penetration in India driven by growing popularity of value added services, social media content, enhanced multimedia smart-phones and affordable mobile devices.

MONETIZATION & CUSTOMER ENGAGEMENT STRATEGIES FOR MOBILE SOCIAL MEDIA

It is interesting to note that both social media and Indian mobile service industry are entering the “maturity curve”. Indian mobile services has entered a phase of “competitive sustenance” going past the emergence and growth curve phases; while social media has entered the “collaboration” phase after disrupting the social interaction model across online users (individual as well as organization level).

Figure 3: Growth Phases of Worldwide Social Media and India Mobile Services



Social Media Growth Phase	Description
I: Inception (1990s to 2002)	Inception of Social Media sites using the concepts of Web 2.0 (a term coined in 1999 and closely associated with Tim O'Reilly)
II: Disruption (2003-2008)	Disruption of socializing model both at an individual as well as organization level
III: Collaboration (2009 onwards)	Collaborative business models or technologies to introduce content & other services

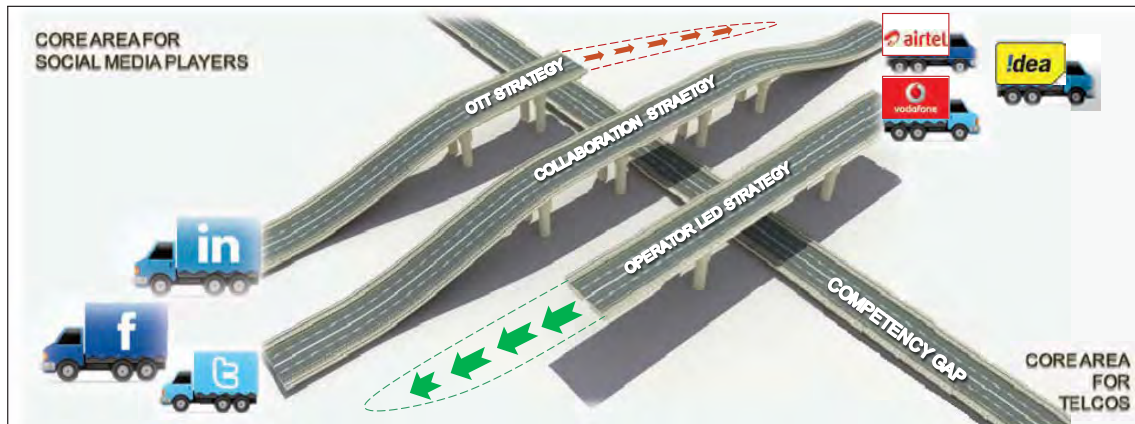
Indian Mobile Service Growth Phase	Description
I: Inception (1992-1998)	Liberalization of Telecom market and introduction of Mobiles Services in the country
II: Emergence (1999-2003)	Increase in competitive environment and market driven low-tariff pricing
III: Trigger of the Growth Curve (2004-2008)	Dominance of mobile services and momentous growth in national Tele-density
IV: Competitive Sustenance (2009 onwards)	Emergence of unified service providers for growth of telecom infrastructure within the country

Social media players have to adopt the mobile route to innovate and expand their services and active users. Mobile operators on the other hand are looking at avenues to increase the data usage amongst their existing subscribers. Both these players may look forward to three strategies from a future growth perspective:

- Over-the-Top (OTT) Strategy:** The term OTT or "over-the-top" refers to the delivery of content or services over an infrastructure that is not under the administrative control of the content or service provider. Typically quality of service and bandwidth is

not controlled in the OTT setup and it is also location and technology agnostic. An OTT customer is free to access services from any location, at any given time and over any access technology. OTT players today wield immense power in the market and include household names in content (YouTube, Netflix, Hulu, myTV), advertising (Google), communications (Skype, Viber, Facebook, Whatsapp), commerce (Amazon and eBay) and device platforms (Apple, Microsoft). As evident, the Social media players have also taken the OTT route to

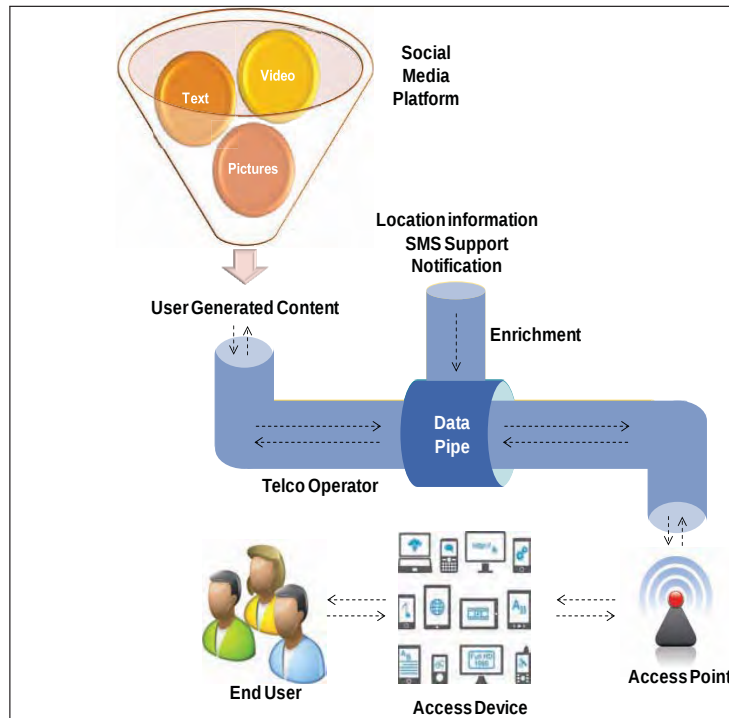
Figure 4: Mobile Social Media Monetization Strategy



provide varied services to their customers. The OTT model raises fundamental challenges on the Mobile Operator's front, namely:

- **Revenue Realization:** OTT players have entered the conventional service zones of mobile operators - Voice, Messaging and Video amongst other services. This has certainly impacted the operators in terms of revenue realization. It is estimated that OTT players in 2012 siphoned SMS revenue to the tune of \$23 billion across the globe. Operators on the other hand have introduced "unlimited data usage" plans to attract customers towards their data services (3G/Wi-Fi/4G); which in turn is cannibalizing their voice and messaging revenue owing to the free ride being provided by OTT Players.
- **Customer Loyalty & Relevance:** The popularity of OTT players amongst the mobile subscribers is on the rise. This maybe correlated to the innovative services being introduced by their preferred social media players (like Facebook introducing Facebook messenger service) or the cost effective interaction channel being offered by the OTT Players (like Skype, Whatsapp, Apple Facetime). OTT players with their wide portfolios of services can erode customer loyalty to the operator's brand.
- **Social media players can piggy bag on the operator's data pipe and generating revenue from advertisers as well as customers and in the process penetrating into the operator's service domain.**
- **Operator Led Strategy:** The growth in the user-generated content and success of cost effective OTT service has forced the mobile operator to re-think their delivery strategy. Up until yesterday, the operators were content with the increase in user generated content and delivering it over their data pipes using advanced high-bandwidth technologies (3G/4G) bundled with the lucrative "unlimited data usage" plans. But the operators realized that their customer acquisition strategy would eventually back fire on their hitherto traditional services. To continue their control on traditional services, operators' are thus left with limited options to counter OTT Players:
- **Confrontation:** Operator's may choose to block the OTT Service (if allowed by the regulator) over their data pipes. Though the same would be the worst option to choose from, however, it is being tried by South Korean operators' whose SMS revenue got wrecked by the popular KakaoTalk OTT player.
- **Constriction:** Operator's can restrict the popularity or adoption of OTT services by applying higher tariff for OTT services or reduce their own tariff relative to the OTT Player. Yoigo, a Spanish operator controlled by Sweden's TeliaSonera, introduced charges for using Mobile VOIP over their network. KPN, AT&T and Verizon are also not far behind to introduce new pricing schemes to counter OTT Players. Application based charging might be another approach where special tariff vouchers (STVs) maybe extended to the subscribers who are willing to subscribe to specialized content or service like "24 hour pass for unlimited video".

Figure 5: Mobile Social Media Delivery Model



Both the above-mentioned approaches may turn out to be counter-productive and impact customer experience or loyalty towards the operator. They are therefore getting attracted to go for an “own it all” business strategy:

- **Service Innovation:** GSMA, the mobile operators’ industry body, is promoting a collective response, formally titled Rich Communication Suite-enhanced (RCS-e) but marketed as “joyn”. Initially joyn will offer messaging, “rich” calls allowing simultaneous sending of pictures and video, and file-sharing. GSMA is also convincing all leading handset manufacturers to embed joyn within the handsets software, so that it comes as a pre-installed application.
- **Become OTT:** Operator’s are developing OTT services to own and operate this segment. Telefónica Digital has introduced TU Me, a message, VOIP and photo-sharing app that has 600,000+ users so far. The apps have got popularity beyond Spain into markets far away like India and US. While, the apps may cannibalize Telefónica’s revenues; but may also earn additional revenue from overseas market.

The operator’s have been compelled to try and test new business strategies because of the impending treat being posed by OTT Players and resorted to these “operator led model”.

- **Collaboration Strategy:** The inflexion point may soon be reached between social media and mobile operators; where they look forward to a collaboration strategy. The social media players have the gift of innovation; whereby new and attractive services be provided to the end user over a seemingly free and technology neutral platform. Operator’s on the other hand the technological know-how to deliver these services and even provide value addition and enhancement like location-based services. Operators have a larger say when it comes to telecom equipment manufacturing especially on the mobile device front.

OTT players have also tried to disintegrate the traditional service delivery model (illustrated below) so as to enter the operator controlled domain. Two instances to substantiate this are:

- **Access Device:** Google launched Nexus One mobile phones though with the prime intention of

challenging Apple's iOS dominance; however it also aimed at promoting the usage of Google services.

- **Access Points:** VOIP Player Skype launched Skype Access service by means of partnership with Wi-Fi hotspot providers throughout the globe for a pay-as-you-go voice and video calling on the move.
- **Data Pipe:** Search giant Google unveiled the Fiber to the Home pilot service in Kansas City brand named as Google Fiber. It aims at providing up to 1Gbps speed to the end user. Not surprisingly it also comes with product bundles like Google Tablet and/or Google TV which comes with local channels, integration with YouTube and Netflix.

OTT players are dependent on the Quality of Service (QoS) provided by the network operator so as to facilitate a better user experience for the end users. Skype voice or voice calls, for instance, are only appreciated by the end user if high quality real-time experience without lag and interruption is realized. To cater to the enterprise segment, OTT players will definitely have to tie-up with network operators to provide high availability, security and desired QoS.

These “double infrastructure building” approach may not be long term and the financial feasibility maybe questionable from a sustenance point of view. Both social media players and mobile operators might have to join hands and synchronize their core-competency areas for

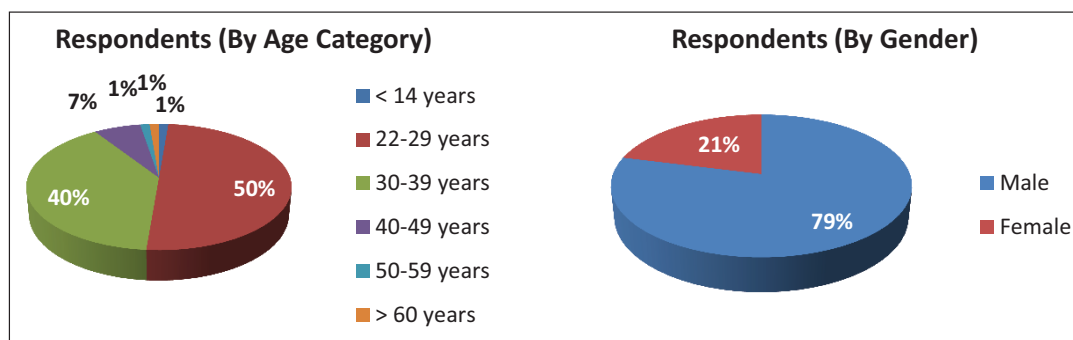
mutual collaboration and growth.

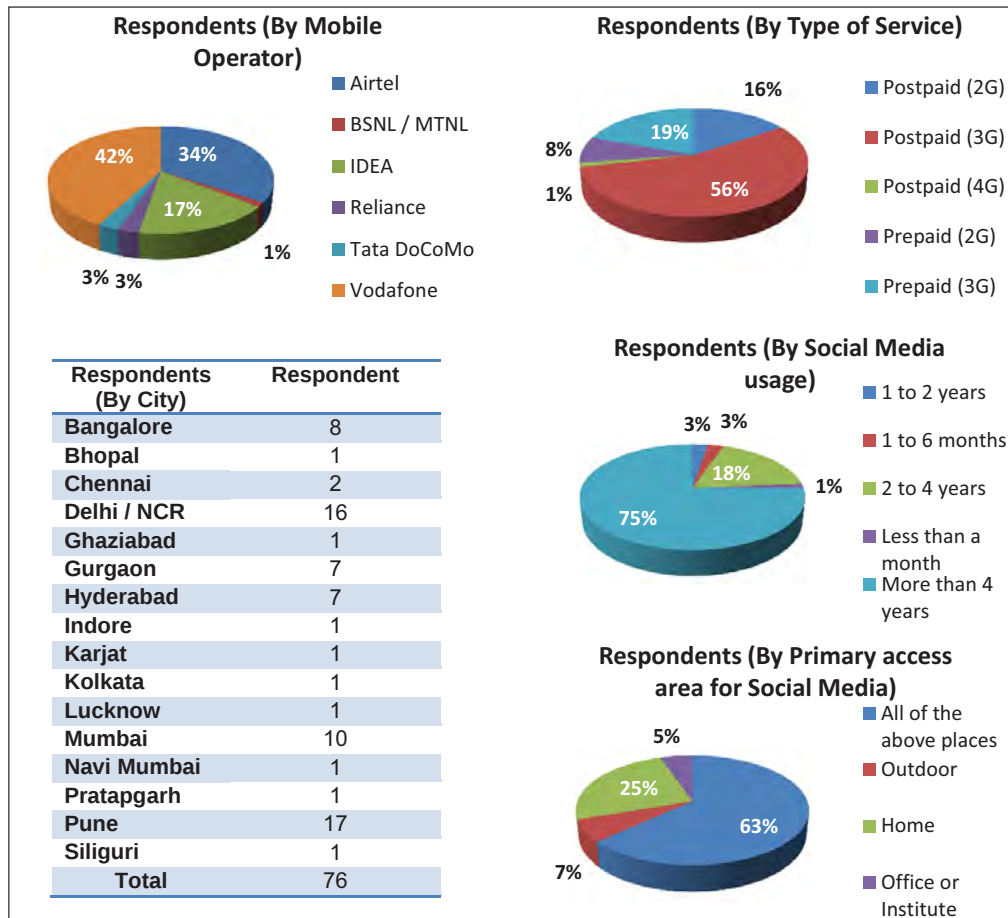
On the customer engagement side, Telcos have a task of not just selling but also to make sure they are engaging well with their customers. Social Media has changed how business is done globally. The need for customer engagement is propelled by the empowered customers who are demanding value for their money (*Yu et al, 2011*). Companies are increasingly keen to use social media for business purposes, in particular, as part of their communication, marketing and recruitment strategy (*Allen & Overy, 2012*). Social media is a cost-effective method for marketing activities (*Paridon & Carraher, 2009*). Social Media can be effective and cost effective in sales, service, marketing, insights and customer retention.

RESEARCH METHODOLOGY

A pilot survey was conducted using email and social media channels (URL: <http://goo.gl/Po0E2q>). Web questionnaire was designed to execute the primary survey. Each question was substantiated with examples, for the used to have a better understanding of the intent and objective of the question. The analysis and finding were derived based on the inputs provided by 76 respondents (post validation of responses) in the primary survey. Majority of the respondents (75%) have been active social media users for more than 4 years. A holistic survey would eventually be conducted using random sampling of active mobile subscribers:

Chart 9: Demographic & Psychographic Profile of Respondents

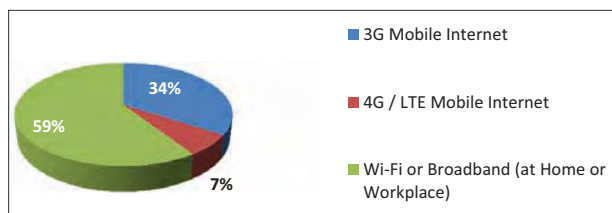




KEY FINDINGS

Based on the primary survey, key behavioral attributes were derived of the social media users. The same is mentioned here-under:

Chart 10: Technology that Provides the Best Social Media Experience

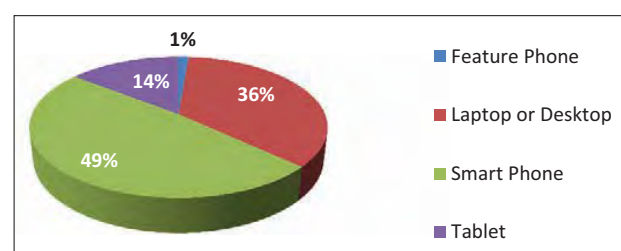


Key Behavioral Attribute

Majority (~60%) of the respondents believe that “Wi-

Fi or Broadband” provides the best experience of social media. The same can be attributed to the fact that Wi-Fi or Broadband provides higher speed and bandwidth compared to Mobile Internet. The perception of 4G/LTE as a superior data technology is still to be established within the consumer.

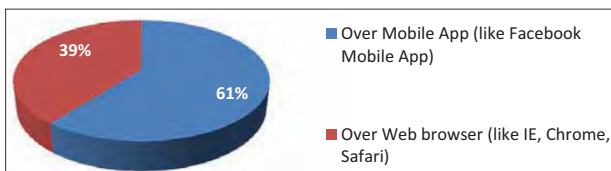
Chart 11: Device that Provides the Best Social Media Experience



Key Behavioral Attribute

Respondents believe that a Smart Phone provides a more holistic experience of social media. Close to 64% of the respondents chose new age mobile devices over desktop and laptop. There is a clear shift in terms of the subscriber usage from earlier communication devices on which the popular social media sites were launched.

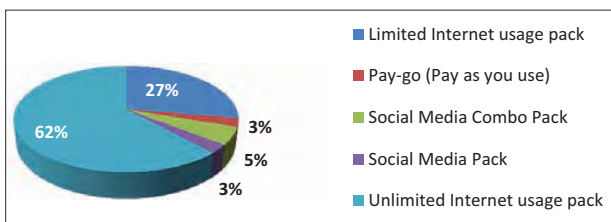
Chart 12: Popular Medium for Accessing Social Media



Key Behavioral Attribute

Similar to the device behavior, subscribers have started to prefer Mobile based Apps (or applications) over Web browsers like Safari, Chrome or Internet Explorer.

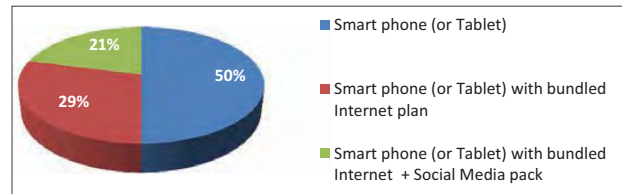
Chart 13: Technology that Provides the Best Social Media Experience



Key Behavioral Attribute:

At the extreme ends of the spectrum the respondents desire “unlimited usage pack” (62%) over “pay go” (3%). “Limited usage pack” is next preferred option by the respondents (27%). Operators have not been able to promote the “social media pack” successfully though.

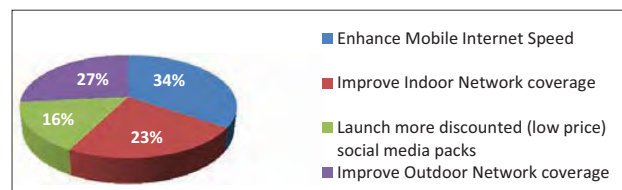
Chart 14: Choice of Next Device Purchase by Respondent



Key Behavioral Attribute:

Majority of the respondents highlighted that their next purchase would be a smart phones or devices (100%). 29% of the respondents wish to make this purchase with bundled mobile Internet pack; while 21% preferred the smart phone or device to be bundled with Mobile Internet as well as Social Media pack.

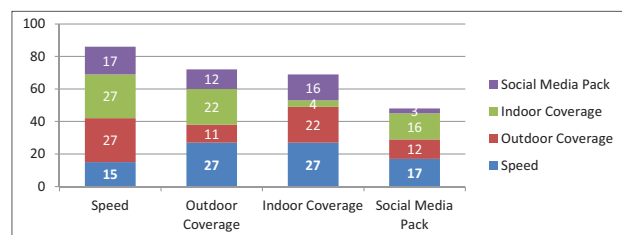
Chart 15: Key ask from the Mobile Operator to Improve the Social Media Experience (Individual)



Key Behavioral Attribute:

Speed is the primary parameter as per the respondents, (34%) that impacts the social media experience. While, discounted pricing isn't so much of concern for the consumers; however they certainly want better outdoor coverage (27%) as also better indoor connectivity (23%).

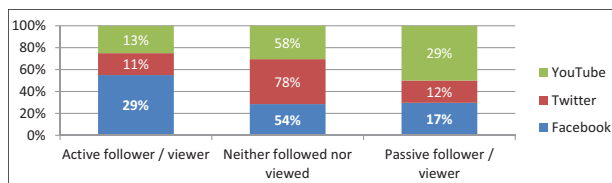
Chart 16: Key ask from the Mobile Operator to Improve the Social Media Experience (Cumulative)



Key Behavioral Attribute

Higher (and equal) no. of respondents voted for “outdoor and indoor coverage” along with the number one parameter i.e. Speed.

Chart 17: Follower of Operator’s Social Media Presence

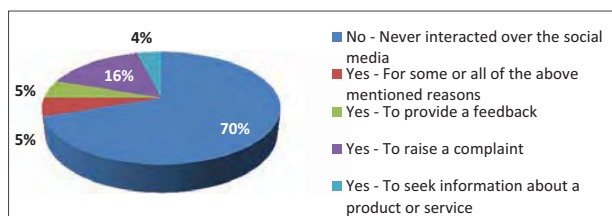


Key Behavioral Attribute

Facebook is the active social media space where most of the respondents have a good following for their Operator. YouTube is a passive social media space where the Operator’s engagement with the respondents was established. Twitter on the other hand showed less penetration with the respondents (with 78% non-followers). Out of the total respondents – active and passive followers across 3 popular social media sites are as follows:

- Facebook: 46%
- Twitter: 22%
- YouTube: 42%

Chart 18: Interaction with Operator using Social Media



Key Behavioral Attribute:

The uptake of social media as a tool for customer engagement is still limited as evident from the voice of the respondents (70% have never interacted with their Operator using social media). On one hand, there

is huge scope and potential to leverage social media to engage with the subscribers especially who are net savvy. However, on the other hand – the operator needs to manage and promote these channels intelligently in order to curtail any negative sentiments which can potentially go viral. As evident from the response, more than 16% of the social media users have used this channel to raise a complaint with their Operator.

CONCLUSION

Interesting insights were derived based on the primary research, the key ones are highlighted below:

- **Mobility** is a key facet of social media today. Data users prefer anywhere-anytime social media access and the same are brought about by smart devices and mobile based applications (Over-the-top applications).
- **Smart Devices:** The above phenomenon also reiterates the shift away from the popular access medium viz. desktop/laptop to mobile smart phones or devices.
- **High speed data technology** provides the best mobile social media experience to the users. There has been a growing demand for 3G services; however Wi-Fi or Broadband is perceived as the best data technology to access social media.
- **Social Media Monetization** is a potential area that the Operators should focus on and provide valuable product propositions to their subscribers in terms of bundled social media packs. It would be interesting to explore the consumer behavior toward such packs from users who do not have access to Wi-Fi or broadband (which forms the majority of the mobile subscribers today). The need for ubiquitous mobile Internet services may be driven partially from the popularity of social media.
- **Data Experience** is paramount for mobile social media users. Majority prefer adequate data speed and coverage (both indoor as well as outdoor) over discounted social media packs.
- **Customer Engagement Over Social Media** is still at inception stage. The operators have not been able to draw the net savvy customers (using 2G, 3G or 4G data services) on to their social media sites (like Facebook, Twitter or YouTube). The traffic to the operator’s social media sites is primarily from

a service point of view; and not so much from the marketing or branding perspective. This surely is an opportunity loss for the Operators who are investing on social media and digital strategy. The effectiveness of twitter as a channel for customer engagement is questionable and further investigation should be made to understand the lower penetration / affiliation to this channel over Facebook and YouTube.

SUMMARY

A paradigm shift is being witnessed in the manner in which communication and social interaction happens with social media emerging as new front runner when compared to hitherto popular email and instant messaging service. This shift has been propounded by mobile technology and the increasing use of mobile devices like Smart Phones and Tablet PCs.

Social media has witnessed a distinct evolution over the last decade, progressing from the web-based access model to mobile led model. Location based service is another feather in the cap of social media. Contextual and location-targeted advertising, combined with premium services and virtual goods may provide a means of effectively monetizing this medium of social media. While mobile technologies and devices are providing a new fillip to this wave of socialization; location-based features have opened up a bouquet of services that maybe offered through the social media players.

The immense popularity of social media has attracted advertisers and enterprise users to effectively engage their prospective as well as existing customers using social media. This has added the commercial aspect to the social media platform. While providing innovative services to the end users, social media players have collaborated with business users to promote their products or services in the most non-intrusive fashion.

In India, the social media revolution is following the footsteps of developed economies like US and UK. The social revolution has really peaked in the sub-continent in the last 5 years. Indians are spending one-fourth of their online time accessing social media sites which is considerably higher than the average figures for the rest of the world. Notwithstanding the fact that the Internet penetration is lower than the world average; the above statistics hints of an opportunity of further growth in this area. The mobile growth is providing the much needed momentum to carry forward this phenomenon as the bulk

usage of Internet is shifting from home & office PCs or Laptops to mobile devices like Smart Phones and Tablet PCs.

Innovation in the mobile social media space has defined a win-win monetizing model for all the players in the value chain-device manufacturers, technology providers, telecom operators, as well as social media players. Mobile operators, who are transition from the voice led model to a data driven strategy, are finding avenues to increase the share of non-voice revenue (viz. currently hovering around 11% in India). The mega investments in next generation high-bandwidth technologies like 3G/ BWA will provide the required momentum to the mobile operators as subscribers resort to user generated content over social media.

In terms of evolution curve, social media has entered into the collaboration phase; while Indian Mobile Service has stepped into a competitive sustenance mode. It would be interesting to see if the hype and hoopla around mobile social media would become a passé or it would emerge as the next big revenue earner for mobile operators as well as social media players. While, the operators were content with the sudden spurt of data revenue, innovative communication and content services were eroding the revenue from voice and messaging services. With the introduction of Over-the-top (OTT) players and over enthusiasm shown by mobile operators on the data business; they opened their data pipe for cannibalization of conventional services. Both, social media players and mobile operators are wary of each other as they wear the competitor's hat. OTT players try several avenues to increase revenue at the cost of mobile operators; the mobile operators in turn are resorting to confrontation and constriction approaches. Some operators have gone overboard to become OTT service provider. Such approaches might not last forever, and both these players would have to shake hands eventually and define a win-win collaborative business model.

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GLOSSARY:

3G	Third Generation Mobile Services	OTT	Over-the-Top
4G	Fourth Generation Mobile Services	PC	Personal Computers
A-GPS	Assisted Global Positioning System	QoS	Quality of Service
BWA	Broadband Wireless Access	RCS-e	Rich Communication Suite - Enhanced
DSL	Digital Subscriber Line	SM	Social Media
Gbps	Gigabit per second	SMP	Social Media Player
GPRS	General Packet Radio Service	SMS	Short Messaging Service
GPS	Global Positioning System	SoLoMo	Social-Local-Mobile
GSMA	Global System for Mobile Communication Association	STV	Special Tariff Vouchers
IAMAI	Internet & Mobile Association of India	TV	Television
ID	Identification	UK	United Kingdom

IM	Instant Messaging Service	US	United States of America
LBSM	Location based Social Media	VAS	Value Added Services
LTE	Long Term Evolution	VOIP	Voice Over Internet Protocol
MOU	Minutes of Usage	Wi-Fi	Wireless Fidelity

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