

Nucleus Mobile Web Browsing Survey | Wave 6 | January 2014

Mobile Web Browsing Wave 6

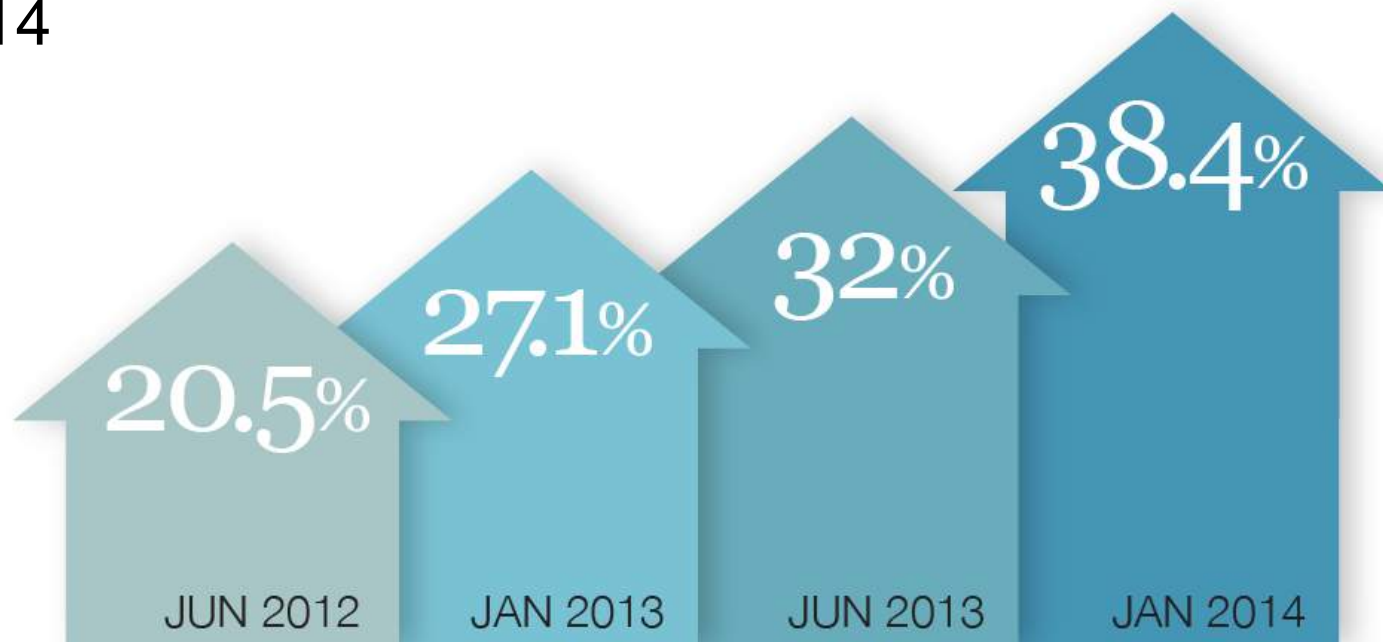
Mobile momentum approaches the tipping point...

March 2014

nucleus
transforming brand horizons

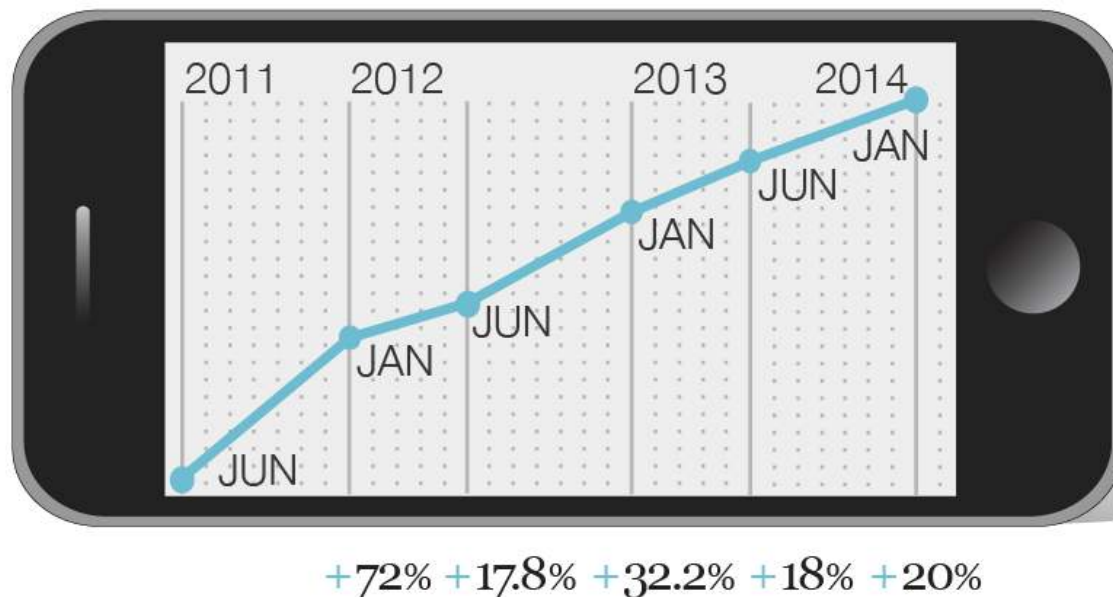
Nucleus Mobile Web Browsing Survey – Wave 6, January 2014
[survey summary; overview](#)

Mobile momentum approaches the tipping point as 38.4% of all traffic shifts to mobile devices in January 2014



Nucleus Mobile Web Browsing Survey – Wave 6, January 2014
rate of growth on track for majority share by early 2015

Mobile traffic growing at 42% year-on-year
and heading for the majority of all web traffic by
early 2015



Nucleus Mobile Web Browsing Survey – Wave 6, January 2014
Apple retains a stranglehold on web browsing

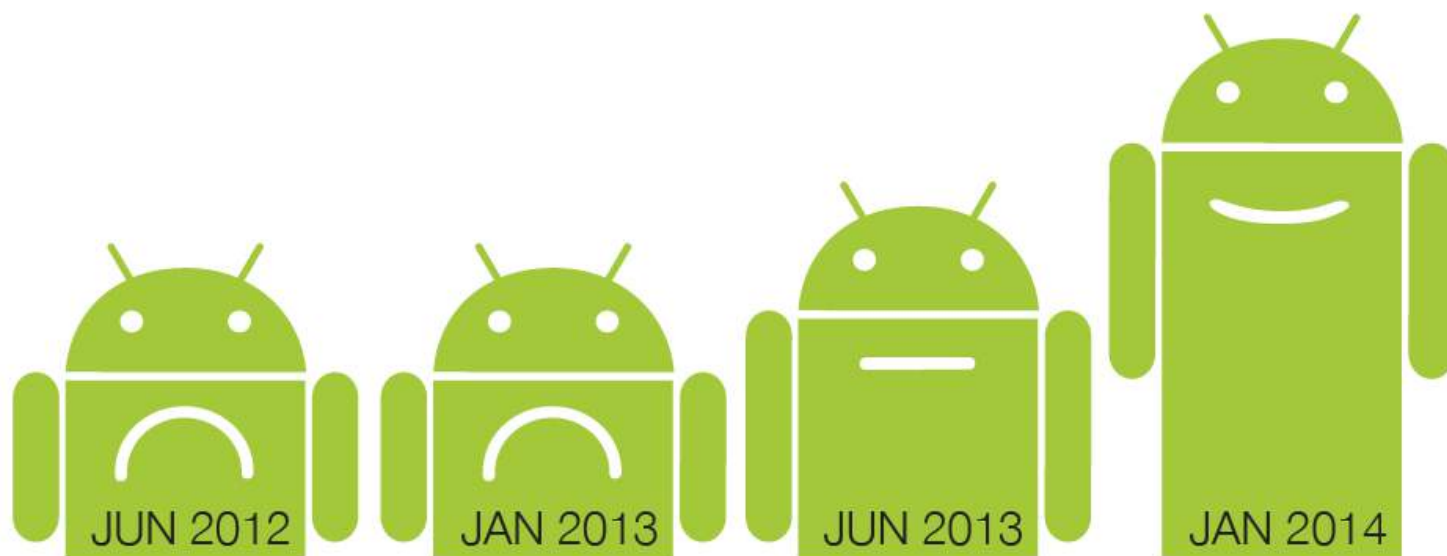
iOS remains dominant with 81.7% share
of mobile OS: iPad 52.1%; iPhone 29.3%;
iPod 0.3%



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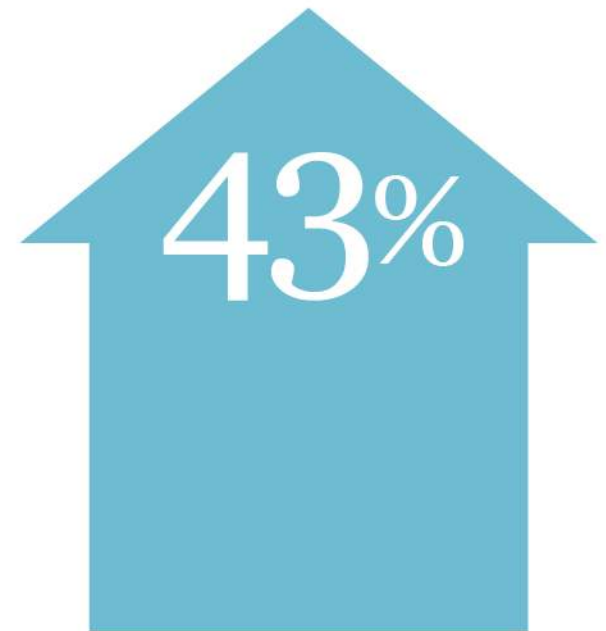
Android still a distant second

Android shows significant growth to 16.5% of mobile OS, largely at the expense of non-iOS operating systems



Nucleus Mobile Web Browsing Survey – Wave 6, January 2014
responsive mobile sites now essential for luxury brands

Luxury hotels with responsive websites show the highest mobile penetration to 43% and more



*Apologies to Christian Louboutin

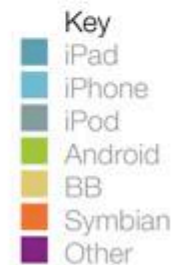
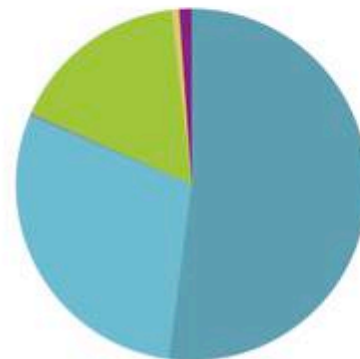
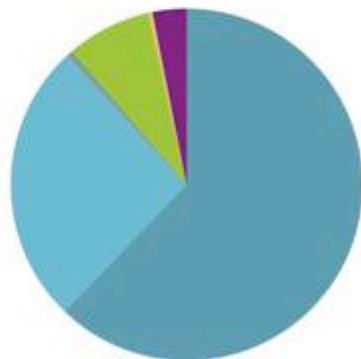
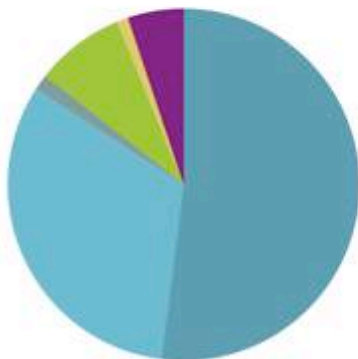
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survey summary; the inexorable rise of mobile browsing

Wave 2: January 2012
Average 17.4% mobile traffic

Wave 4: January 2013
Average 27.1% mobile traffic

Wave 6: January 2014
Average 38.4% mobile traffic



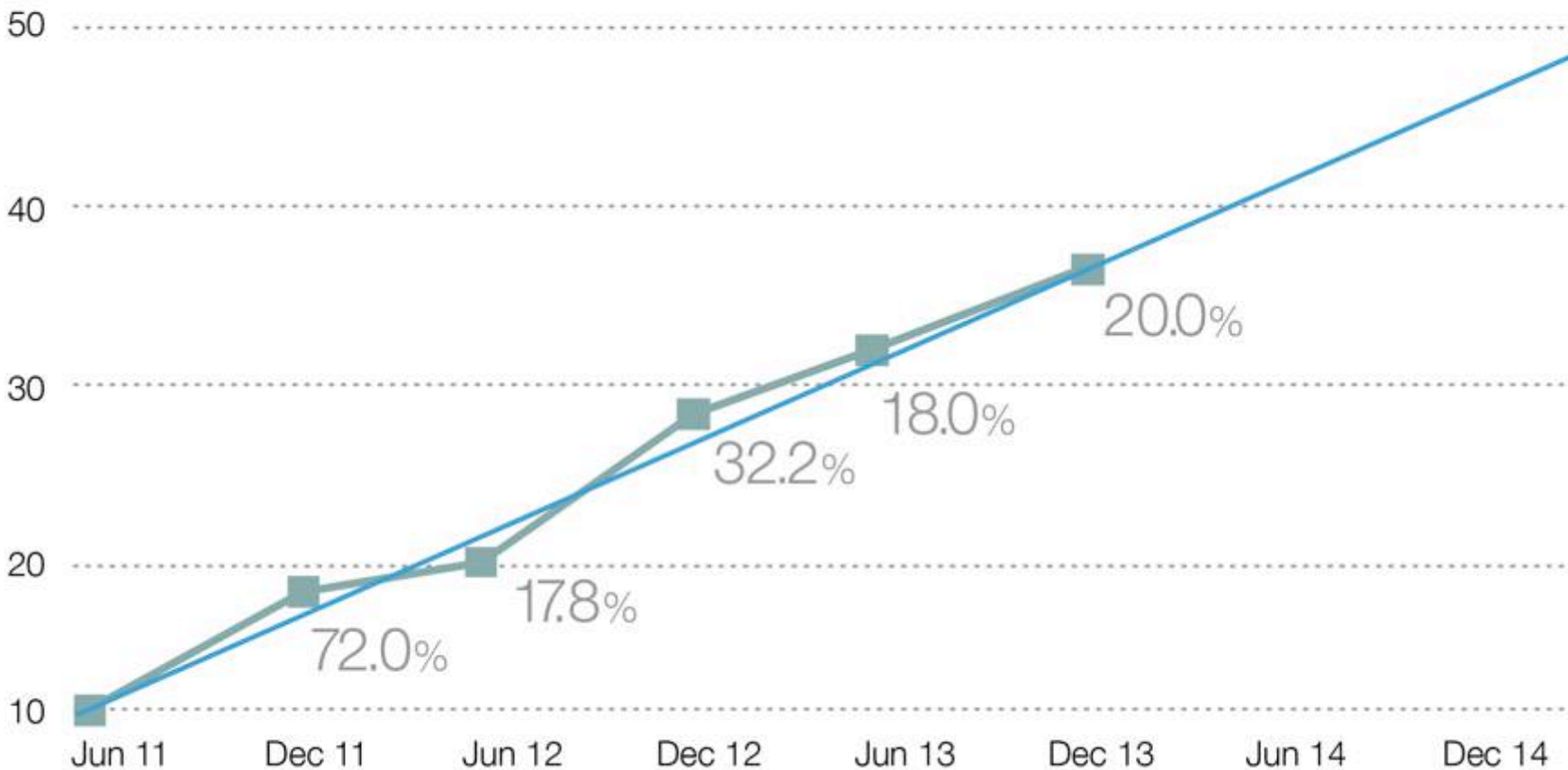
The Nucleus Mobile Web Browsing Survey studies 12 UK and international travel websites. Fieldwork for Wave 6 took place on 31st January 2014 with a total user base of 1.5m unique visitors in the month.

Nucleus Mobile Web Browsing Survey – Wave 6, January 2014

survey summary; mobile browsing on track for 50%+

Wave 6: Mobile browsing between June 2011 and January 2014

Average compound growth rate%

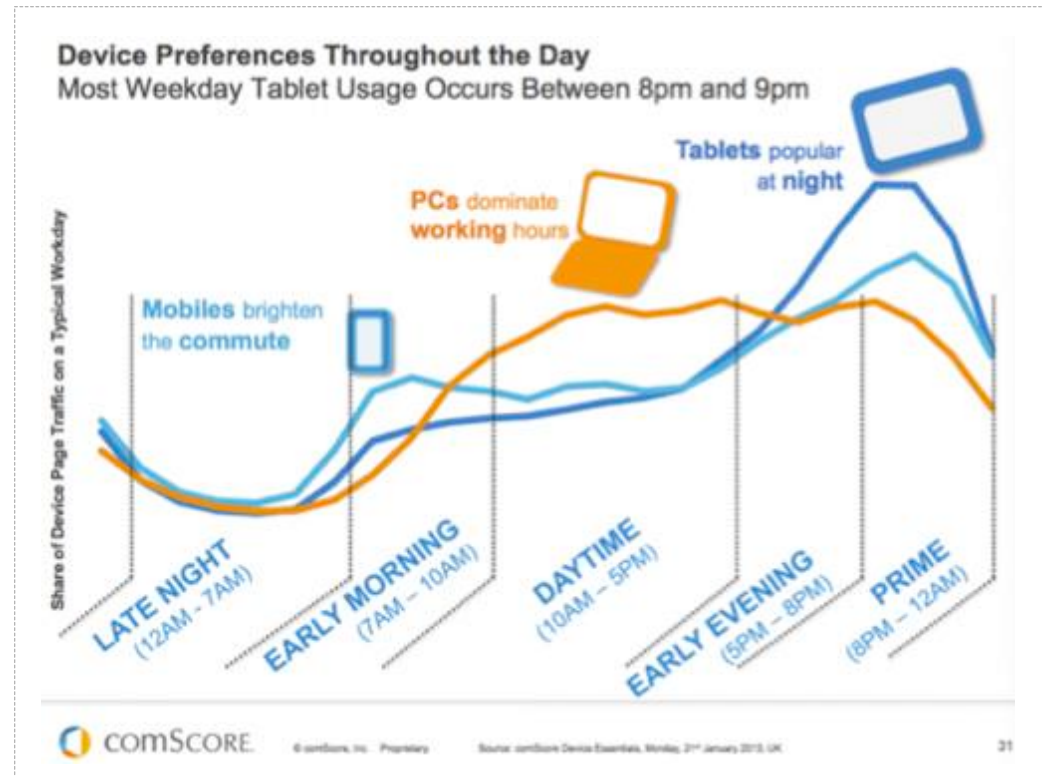


Nucleus Mobile Web Browsing Survey – Wave 6, January 2014 looking ahead...

Growth is driven by
**dramatic changes in
consumer behaviour**

Mobile browsing
already ahead of PCs
at certain times
of the day

2014 will mark the **end
of the PC era**

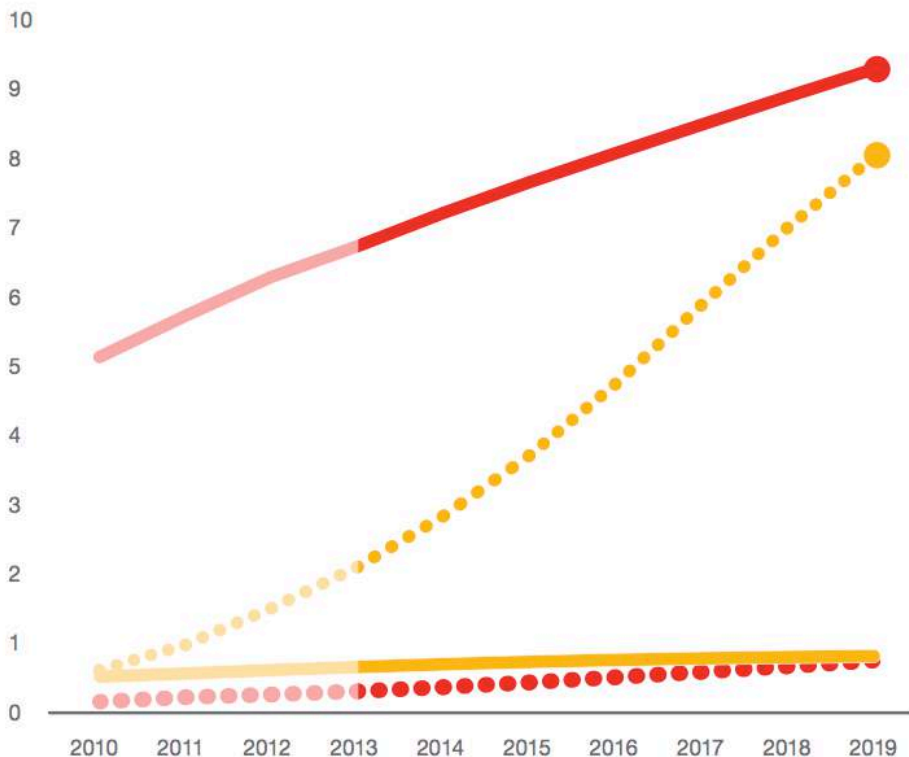


© ComScore 2013

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looking ahead...smart mobile devices will dominate the web

Subscriptions/lines (billion)



9.3 BILLION

mobile subscriptions by the end of 2019

4X

growth in mobile broadband subscriptions between 2013 and 2019

- Mobile subscriptions
- Fixed broadband subscriptions
- Mobile broadband subscriptions
- Mobile PCs, tablets and mobile router subscriptions

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so what's the travel industry's response to this opportunity?

More than a third (34 per cent) of the UK's top travel brands do not have any kind of mobile presence, with just one in five offering a “seamless purchase path”...

Less than half (48 per cent) of the UK's top travel brands have a mobile app, with only 56 per cent (14) of these offering fully transactional services...



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what should travel brands do?

Three **must-dos** for all brands:

1. Take mobile **really seriously**
2. Plan a mobile-first integrated strategy with a **seamless customer experience across all devices**
3. Invest in **responsive design** and mobile media

...it's still not too late to create **competitive advantage** in the Mobile era.

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responsive web design

Responsive web design is a technique that provides the user with an optimal web browsing experience across a wide range of devices, from smartphones to tablets, laptops and desktops – and in future HD TVs

At Nucleus we have used RWD for several years and our designers and developers are now adept at harnessing the fluid, proportion-based grids and flexible images to create compelling, engaging brand experiences

Unlike separate smartphone sites, RWB sites benefit from a single content repository, which make content management and enhancements much simpler and more efficient, especially across multi-lingual websites

Examples of Nucleus's responsive and mobile sites in the travel sector:

www.cvvillas.com

www.regenthotels.com

www.toppingrothouse.com

www.stjamescourt.com

Nucleus Mobile Web Browsing Survey – Wave 6, January 2014

study methodology and sample

This is Nucleus' 6th wave, six-monthly snapshot of mobile browsing on travel websites.

The sample comprised 12 travel websites from mass market to high-end luxury, including both UK and international brands with global audiences.

Total unique visitor sample for the 12 websites was 1.5m unique visitors during fieldwork for the month of January 2014, compared to 1.3m in June 2013.

Android market share includes specific Android devices plus 'unspecified devices' which may inflate the statement of Android OS share.

Some analytics packages, such as Google Analytics, include various 'mobile' devices in its mobile tracking, such as Xbox and Wii. These and all minor mobile operating systems and devices, of which there are many, are consolidated in 'other.'

Website by website

Nucleus Mobile Web Browsing Survey – Wave 6, January 2014

Website 1

Insight 1

Mobile traffic up 64% in last 12 months to 42.2% of all traffic

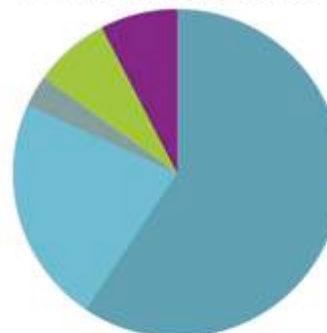
Insight 2

Tablet traffic outweighs smartphones by more than 3 times, with the iPad accounting for 64% of total mobile traffic

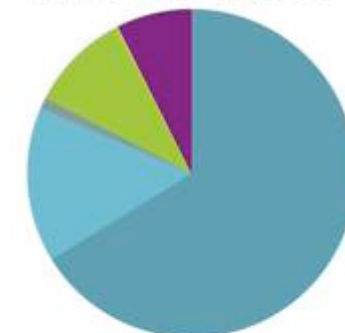
Insight 3

The only website in our sample showing higher Android than iPhone browsing, 22.9% against 11.8% respectively, but much of the Android traffic uses Samsung tablet devices

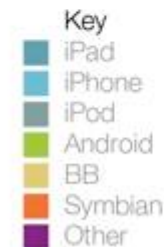
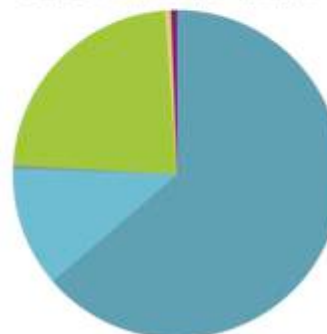
Wave 2: Jan 2012
12.7% mobile traffic



Wave 4: Jan 2013
25.7% mobile traffic



Wave 6: Jan 2014
42.2% mobile traffic



Website 1 targets an older age profile than the sample average but still shows a 30% increase in mobile traffic since June '13. iPhone browsing declined as a %, probably due to non-optimised user experience, but iPad remains the favoured browsing device, with Samsung tablets also popular.

Nucleus Mobile Web Browsing Survey – Wave 6, January 2014

Website 2

Insight 1

Mobile traffic up by almost a third in the last period for this responsive-designed website

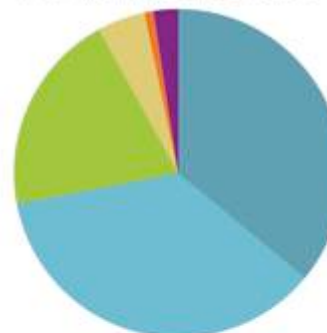
Insight 2

Tablet browsing accounts for two thirds of total mobile browsing, with iPad as the mobile device of choice

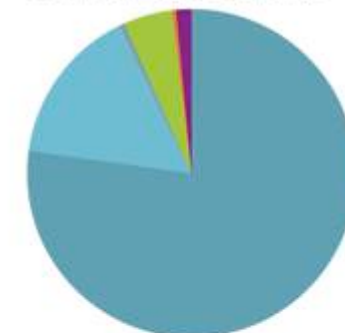
Insight 3

Lowest Android browsing in our sample, with iPad accounting for a huge 69.1% share. Furthermore, iOS devices together account for almost 90% of this site's mobile traffic

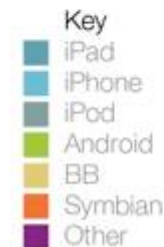
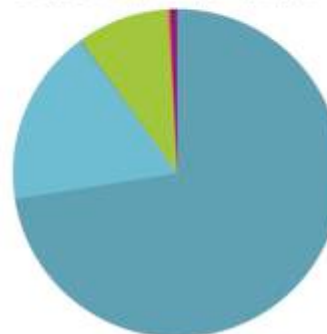
Wave 2: Jan 2012*
14.7% mobile traffic



Wave 4: Jan 2013**
30.1% mobile traffic



Wave 6: Jan 2014
39.2% mobile traffic



The year-on-year figures are only representative for one year as this site joined the survey in January 2013, so Wave 2 figures are an average for all sites. Nevertheless, this site shows the highest iPad browsing in our sample, perhaps owing to the slightly older demographic than the sample average

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Website 3

Insight 1

One of three sites to show increased smartphone browsing to tablet traffic overall

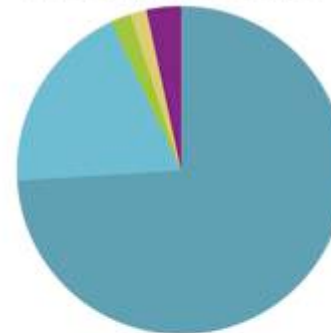
Insight 2

Android traffic increased share to 15.7% of total traffic, representing an 83% increase on the previous period

Insight 3

iPad accounts for 46.7% of traffic. iOS devices remain dominant with 82% of total mobile traffic but, surprisingly, iPhone traffic grows despite the site being non-optimised for smartphones

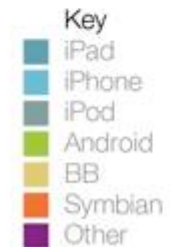
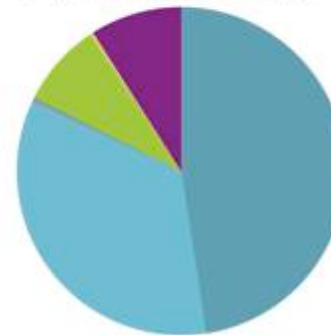
Wave 2: Jan 2012
17.3% mobile traffic



Wave 4: Jan 2013
24.7% mobile traffic



Wave 6: Jan 2014
34.7% mobile traffic



Website 3 illustrates how smartphones are critical for luxury websites, even when they are not optimised for smaller screens. With a mobile-friendly site due later in the year, we expect this 5 star site to benefit exponentially

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Website 4

Insight 1

Despite this site not offering a good mobile experience, mobile traffic has still grown by 15% in the period

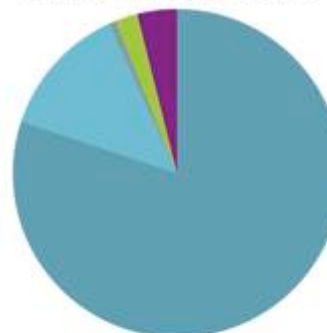
Insight 2

Above average iPad penetration, accounting for 63.4% of total mobile browsing

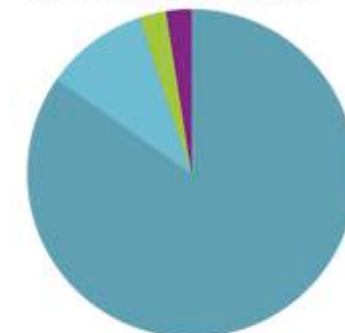
Insight 3

Android traffic continues to grow, showing a 31% increase over the past 6 months. Nevertheless, iPhone browsing continues to increase at least as quickly

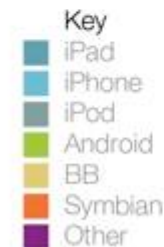
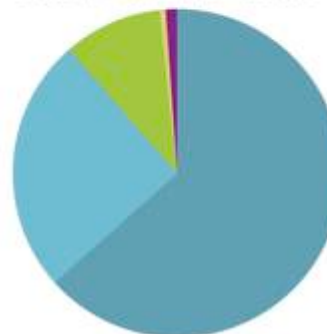
Wave 2: Jan 2012
18.0% mobile traffic



Wave 4: Jan 2013
31.1% mobile traffic



Wave 6: Jan 2014
38.5% mobile traffic



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This website offers a poor mobile experience for users, but the mobile browsing figures are still bang on average for the period, highlighting the overwhelming need for all brands to offer a good mobile user experience. A new responsive site will certainly positively impact this brand's online performance

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Website 5

Insight 1

Mobile traffic has grown 113% in the past 2 years, to 36.5% of total browsing

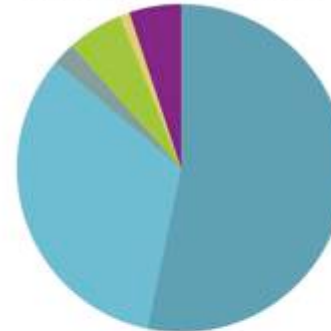
Insight 2

iPad remains far and away the largest mobile player, accounting for a hefty 62.8% of all mobile traffic

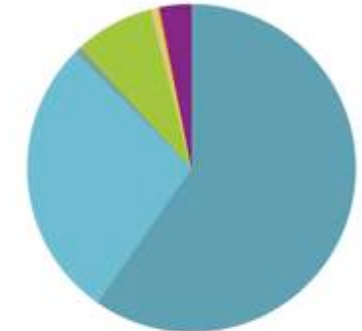
Insight 3

Android share is up almost 100% in 6 months, from 6.8% to 13.5% of total mobile traffic. However, total iOS share remains dominant at 85%...

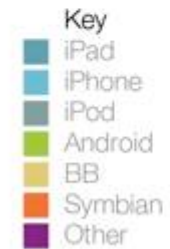
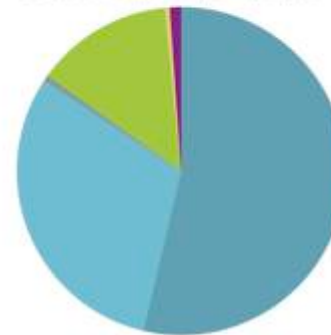
Wave 2: Jan 2012
17.1% mobile traffic



Wave 4: Jan 2013
25.7% mobile traffic



Wave 6: Jan 2014
36.5% mobile traffic



Since our first study in June 2011, mobile traffic to this luxury hotel website has grown from 9.1% to 36.5% with a high proportion of international traffic, iOS remains consistently dominant, despite Android's recent growth spurt

Nucleus Mobile Web Browsing Survey – Wave 6, January 2014

Website 6

Insight 1

iOS dominates with 90.9% of total mobile browsing for this luxury website and high penetration of iPhone

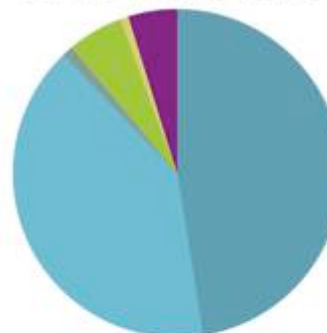
Insight 2

Despite a slight decrease over the past 6 months, iPad remains the leading mobile device, accounting for 53.3% of all mobile traffic

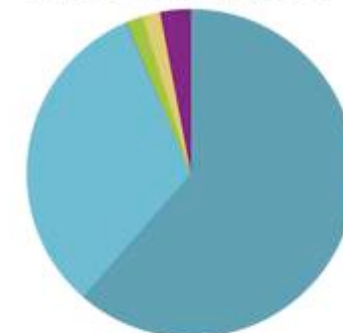
Insight 3

Android traffic grows by 43.6%, but still only accounts for 7.9% of total mobile browsing, a figure far below average for the period

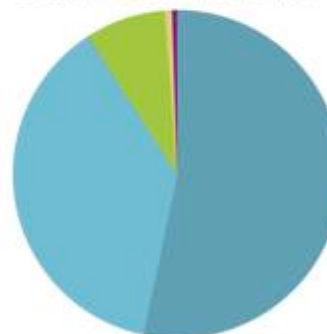
Wave 2: Jan 2012
21.4% mobile traffic



Wave 4: Jan 2013
25.8% mobile traffic



Wave 6: Jan 2014
36.1% mobile traffic



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This luxury, iPad 'native' site shows an above average iOS share representing 90.9% total browsing

Nucleus Mobile Web Browsing Survey – Wave 6, January 2014

Website 7

Insight 1

Mobile traffic now accounts for 42.9% of all website browsing again demonstrating the important match of mobile with luxury

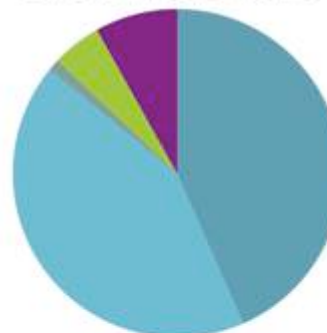
Insight 2

Mobile penetration has grown by an impressive 181% since the start of the study

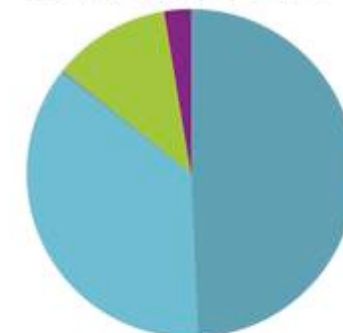
Insight 3

Android achieves an above average 18% share, perhaps due to a high percentage of international users adopting newer Samsung tablets

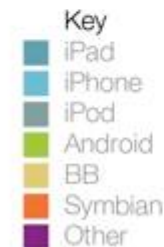
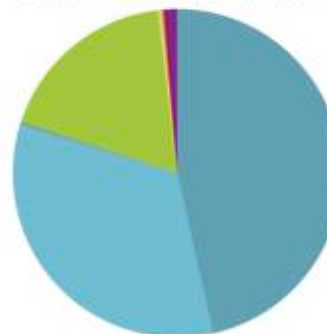
Wave 2: Jan 2012
24.2% mobile traffic



Wave 4: Jan 2013
30.1% mobile traffic



Wave 6: Jan 2014
42.9% mobile traffic



Overall mobile traffic to this site has almost tripled since June 2011, representing a 181% increase in mobile browsing since the first study. Android continues to make some inroads with the latest devices, representing a 56.5% increase in browsing since January 2013

Nucleus Mobile Web Browsing Survey – Wave 6, January 2014

Website 8

Insight 1

This website has an above average Android share, accounting for 23.9% of total mobile penetration

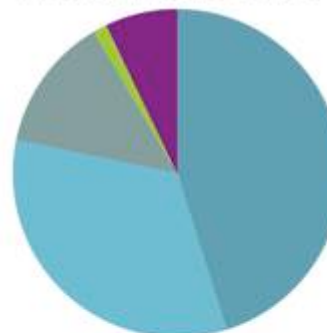
Insight 2

iOS share has only shown a very slight increase, from 72.1% in June 2013, to 72.6% in January 2014

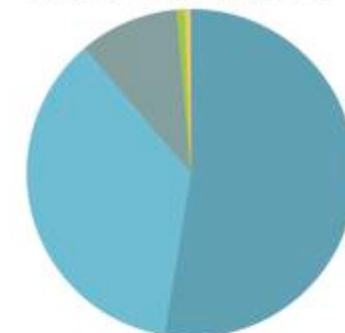
Insight 3

iPad browsing exceeds iPhone by only a small margin, showing a 37.6% and 34.6% share respectively

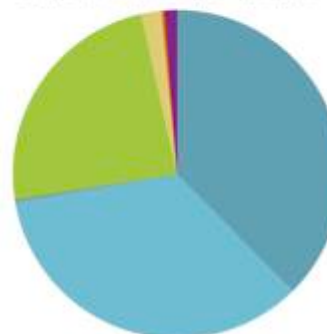
Wave 2: Jan 2012
17.9% mobile traffic



Wave 4: Jan 2013
29.8% mobile traffic



Wave 6: Jan 2014
37.0% mobile traffic



For this Asian-based brand iPhone is very quickly catching up with iPad traffic while Android is gatecrashing Apple's party in spectacular style, possibly due to the rapid growth of Android in Asia

Nucleus Mobile Web Browsing Survey – Wave 6, January 2014

Website 9

Insight 1

Tablet and mobile browsing to this website are very evenly spread, with tablet traffic just exceeding mobile by ½ percentage point

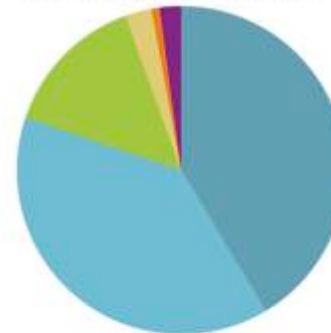
Insight 2

Below average iOS share, accounting for ‘only’ 73.9% of mobile browsing, with the iPad accounting for less than half of all mobile traffic

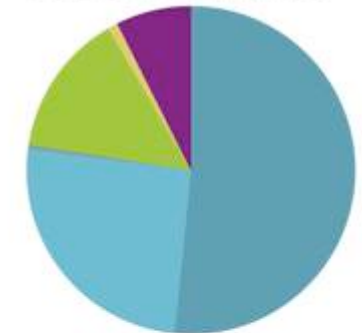
Insight 3

Android traffic has shown a slight decline between Wave 5 and 6, from 26.3% to 23%, but still above average figures across the sample

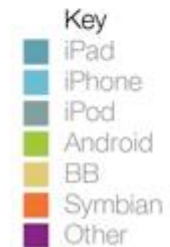
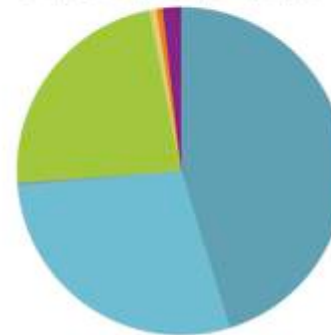
Wave 2: Jan 2012
10.9% mobile traffic



Wave 4: Jan 2013
20.3% mobile traffic



Wave 6: Jan 2014
34.2% mobile traffic



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This hotel group has an international business and leisure audience, with a range of 4 and 5 star hotels, which may explain the higher penetration of Android and subsequent lower iOS share.

Nucleus Mobile Web Browsing Survey – Wave 6, January 2014

Website 10

Insight 1

At 33.4%, this site has the lowest mobile penetration in the survey, yet still represents over a third of all traffic

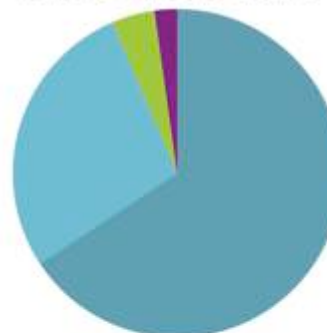
Insight 2

91.8% iOS mobile traffic, with iPad representing a 65.8% share of mobile browsing

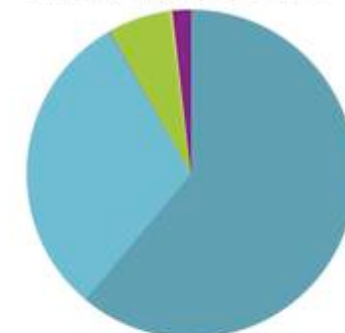
Insight 3

Below average Android browsing, accounting for just 7.6% of browsing, and representing a -1.2% decline on the previous period

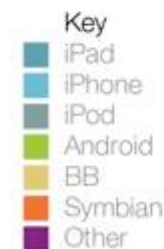
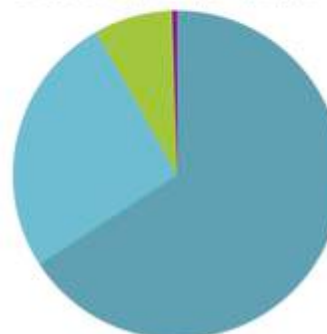
Wave 2: Jan 2012
19.9% mobile traffic



Wave 4: Jan 2013
27.6% mobile traffic



Wave 6: Jan 2014
33.4% mobile traffic



iOS remains the significant leader in this segment, consistent with a long haul leisure target audience and a premium browsing experience, although overall mobile share reflects non-optimised site design and long haul destination where more planning is required, favouring PCs

Nucleus Mobile Web Browsing Survey – Wave 6, January 2014

Website 11

Insight 1

Significant increase in Android browsing, from 4.3% in June 2013 to 20.1% in January 2014

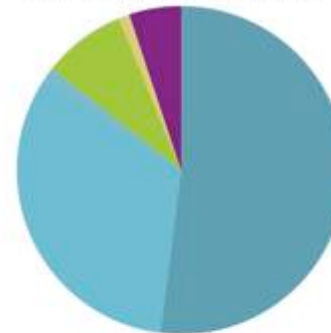
Insight 2

With the highest mobile share in the survey, this responsive designed site saw mobile traffic account for 43.4% in January 2014

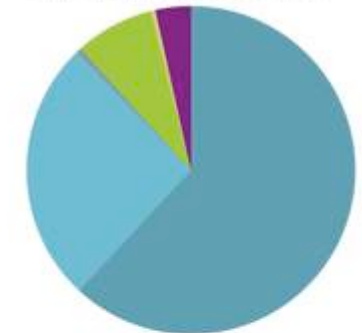
Insight 3

Smartphone browsing exceeds tablet, accounting for 26.5% of total mobile browsing over tablet's 16.9%

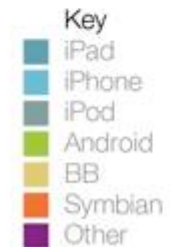
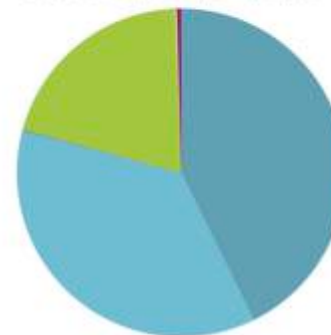
Wave 2: Jan 2012*
17.4% mobile traffic



Wave 4: Jan 2013*
27.1% mobile traffic



Wave 6: Jan 2014
43.4% mobile traffic



Huge 376% increase in Android browsing in the period, for this luxury hotel and highest smartphone use, demonstrating value of responsive design.

*Year-on-year figures are only representative for 2013/14 as this site joined the survey in June 2013

Nucleus Mobile Web Browsing Survey – Wave 6, January 2014

Website 12

Insight 1

This new responsive website shows the second highest mobile penetration in our survey, accounting for 43% of total website traffic

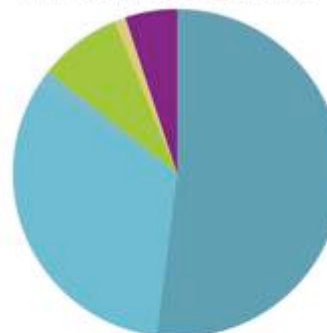
Insight 2

One of only two websites in the sample to show iPhone browsing exceed iPad traffic in the period, with figures at 26.4% and 16.6% respectively

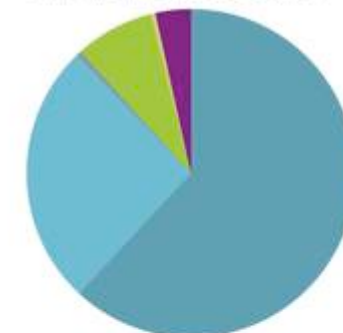
Insight 3

Android traffic is over 10 percentage points above the average figure accounting for 27.1% of total mobile browsing

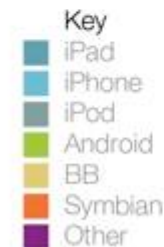
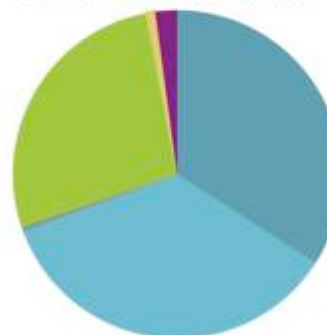
Wave 2: Jan 2012*
17.4% mobile traffic



Wave 4: Jan 2013*
27.1% mobile traffic



Wave 6: Jan 2014
43.0% mobile traffic



*The year-on-year figures are not representative as this new site joined the survey in January 2014, so Wave 1-Wave 5 figures are an average for all Wave 1-5 sites. The high penetration of smartphones demonstrates the benefits of responsive design optimised for smaller screens

Nucleus Mobile Web Browsing Survey – Wave 6, January 2014
Nucleus mobile website capabilities

Nucleus is the world's first integrated brand+digital+intellectual property consultancy, specialising in creating and capturing value from integrated brand projects in the travel, luxury and financial services sectors.

With leading-edge experience of responsive design and mobile websites and apps, Nucleus can provide insight and advice on digital strategy, brand experience and mobile development.

For more information, please contact Ella Matthews on +44 (0)208 398 9133 or ematthews@nucleus.co.uk

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Nucleus Mobile Web Browsing Survey – Wave 6, January 2014

List of references

Previous Nucleus surveys and articles:

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Wave 6

Mobile momentum approaches
the tipping point...

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