

Nucleus Mobile Web Browsing Survey | Wave 4 | January 2013

Wave 4

Web browsing leaps into the Mobile era

...and iPad drives iOS to highest ever share

January 2013

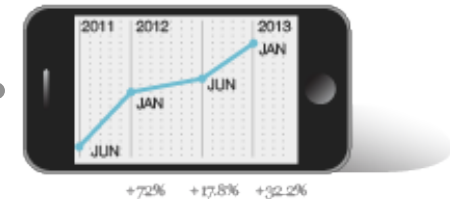
nucleus

transforming brand horizons

Nucleus Mobile Web Browsing Survey – Wave 4

Survey summary;

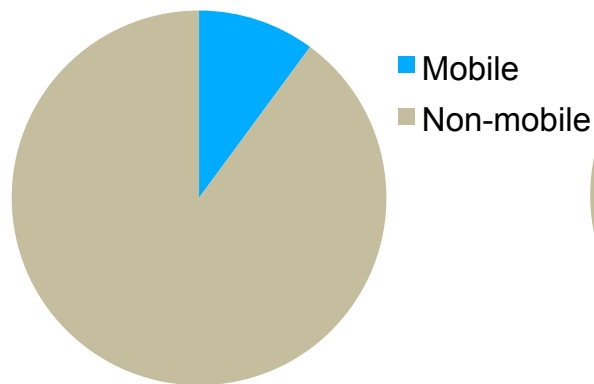
- Mobile browsing of travel websites **leaps to 27.1% of all traffic in January 2013**
- Growth rate **accelerates again, up 32.2%** on previous period
- **iPad drives iOS to all time high, with an 88.3% share of mobile browsing devices**, up from 84.9% six months earlier
- **iPad Mini** has reinforced iOS's dominant position; iPhone 5 impact less obvious
- **Android still failing to grow browsing share**, steady at 8% penetration
- **Luxury websites** show highest mobile traffic, with >30% average



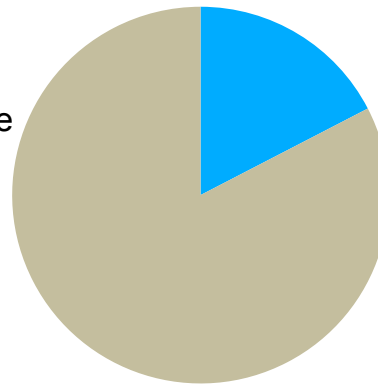
Nucleus Mobile Web Browsing Survey – Wave 4

Survey summary;

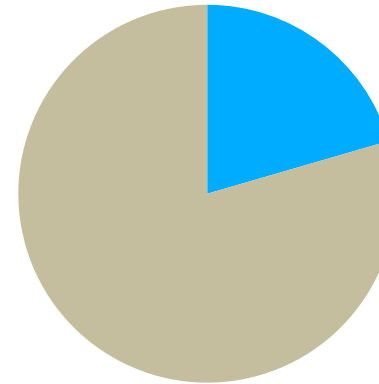
Wave 1: June 2011
Average 10.2% mobile traffic



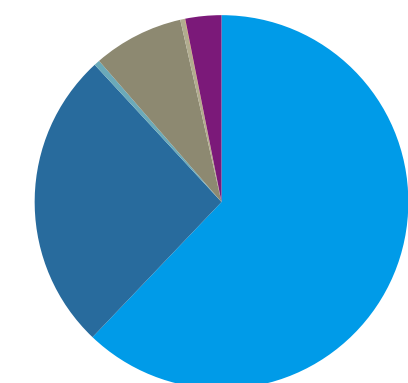
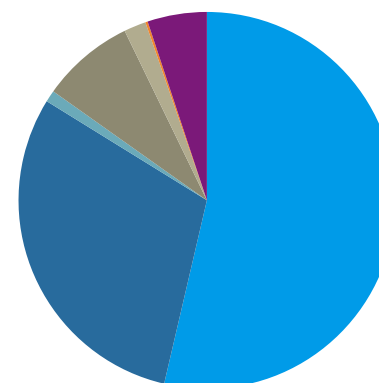
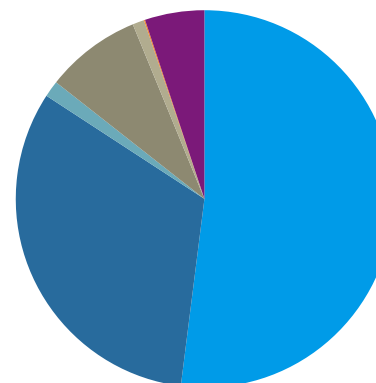
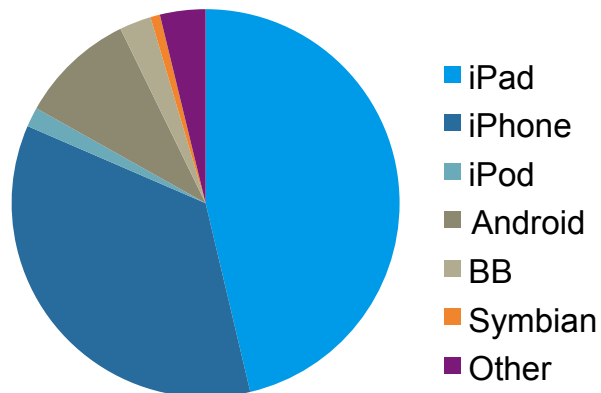
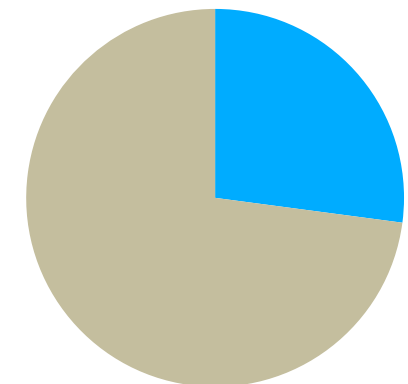
Wave 2: January 2012
Average 17.4% mobile traffic



Wave 3: June 2012
Average 20.5% mobile traffic



Wave 4: January 2013
Average 27.1% mobile traffic



The Nucleus Mobile Survey of web browsing studies 10 UK and international travel websites. Fieldwork for Wave 4 took place on 31st January 2013 with a total user base of 1.7m unique visitors in the month.

Nucleus Mobile Web Browsing Survey – Wave 4

Executive summary

Mobile web browsing has taken another leap forward since our previous survey in summer 2012, with penetration up 32.2% **to 27.1% of all website traffic** in the survey and iPad firmly established as the favourite browsing device.

We are not alone in observing this trend. In her 2012 “Internet Trend Year-end Report” Mary Meeker has also covered the subject, reporting that **24% of all US online shopping on Black Friday 2012 (the day after Thanksgiving) was made via smartphones and tablets**, up from 6% just two years ago.

She also spotted the Android anomaly – why, with so many Android devices sold, hasn’t Android grown its share of browsing since our first survey in 2011? While iOS increases its operating system share to a staggering 88.3%, Android is stranded on 8%

Winners – Apple’s iOS still dominates the market, averaging 88.3% of all mobile traffic to the 10 websites surveyed, but iPad is the real winner with share up 15.3%, following the launch of the new iPad Mini. iPad now represents **61.9% of all mobile browsing**. iPhone traffic however has shown a -14% decline despite the launch of the iPhone 5

Steady Eddies – While Android browsing has risen on the more price sensitive mass market websites, the average penetration of website browsing has remained at a steady 7-8%... contd

Nucleus Mobile Web Browsing Survey – Wave 4

Executive summary, continued

Losers – iPod, Blackberry and Symbian smartphones together represent less than 1% of mobile browsing, with Symbian on it's death bed

Nokia must also be worried as Microsoft's Windows Mobile 7 operating system has yet to register significantly in the survey.

Will the launch of the Blackberry 10 be enough to pull iOS users from their platform? Or will it be a case of too little, too late? Web browsing on existing Blackberry devices is not a great experience...

Nucleus Mobile Web Browsing Survey – Wave 4

iPad – winner takes most

Despite being outsold by Android, **Apple's iOS grows its share of mobile browsing to 88.3%** on the back of sustained iPad success, with even higher penetration on luxury websites

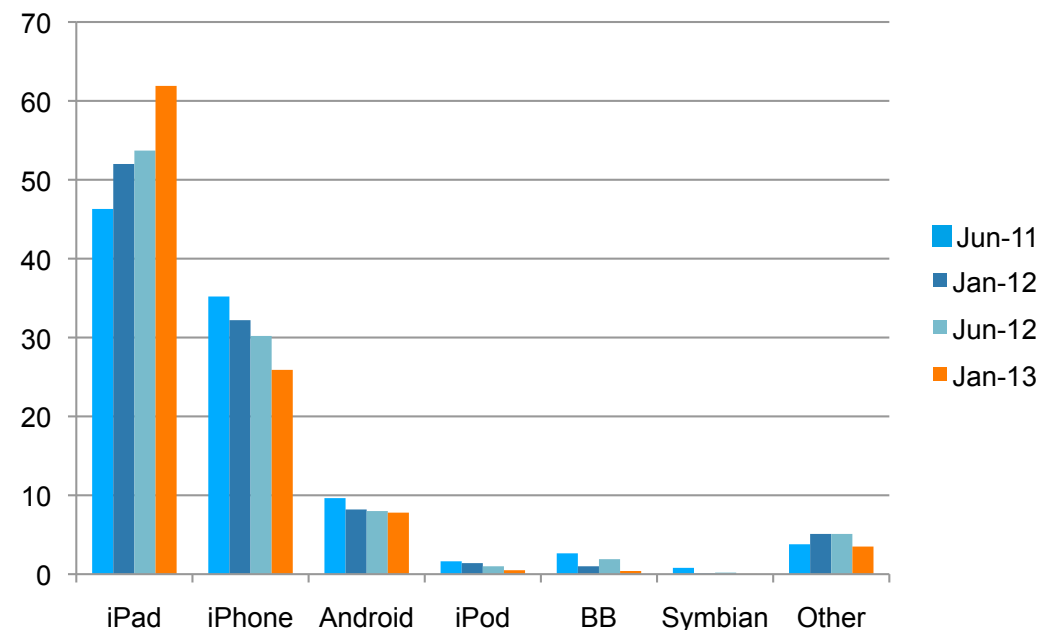
Microsoft is going nowhere, BB's share plunging, Symbian heads for oblivion...

Device shares:

- iPad **+15.3%**
- iPhone: -14.1%
- iPod: -56.7%
- Android: -1.6%
- BB: -79.7%
- Symbian: -85%

Note: 'Other' contains many small OS platforms including Wii and Xbox.

Wave 4: Growth in mobile device share between June 2011 and January 2013 (%)



Nucleus Mobile Web Browsing Survey – Wave 4

Implications for brands, digital marketing and design

3 out of the 10 websites in the sample are now showing mobile traffic levels of more than 30%. 8 out of 10 have 25%+ mobile traffic.

Luxury brands attract the highest levels of mobile browsing and also the highest level of iOS users – online conversion must now be addressed for mobile users, especially iPads.

Providing **mobile-friendly web browsing brand experiences** is now key for all website owners, especially in the travel and ecommerce sectors, where online conversion is already vital for business.

Brand owners need to decide whether to develop a single website that responds or adapts to different devices (responsive design like www.toppingrothouse.com) or separate smartphone websites with simplified content (www.haven.com).

However, the challenge is about to get even more complex with connected tv due to become mainstream from later in 2013, posing designers with the challenge of designing websites that scale from 4.5 inch screens to more than 10x that size.

For details of Nucleus' mobile and digital capabilities please visit www.nucleus.co.uk or call us on +44 208 398 9133 to discuss opportunities with our mobile team.

Nucleus Mobile Web Browsing Survey – Wave 4

Study methodology and sample

This is our 4th wave, six-monthly snapshot study of mobile browsing of travel websites.

The sample comprised 10 travel websites from mass market to high-end luxury, including both UK and international brands with global audiences.

Total unique visitor sample for the 10 websites was 1.7m unique visitors during fieldwork for the month of January 2013, compared to 2.2m in June 2012.

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 4

Website 1

Insight 1:

Mobile traffic up over 100% in last 12 months to 25.73% of all traffic, showing a massive 285% increase in 18 months

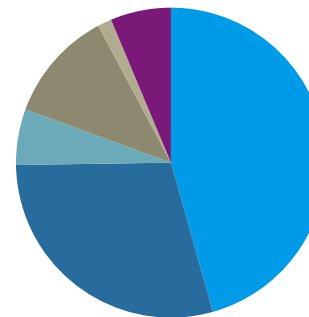
Insight 2:

iPad browsing soars to 66.5% of all mobile traffic, whilst all other devices (bar Android) show a decline in browsing share

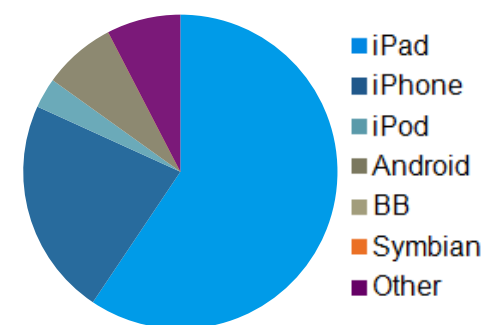
Insight 3:

Android traffic grows 20%, but from a low base. iOS devices account for 82.6% of this site's mobile traffic

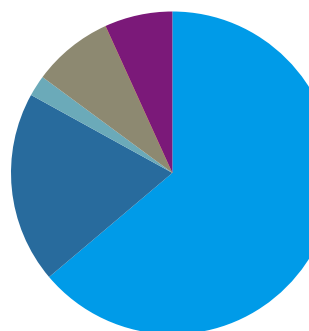
Wave 1: June 2011
(6.69% mobile traffic)



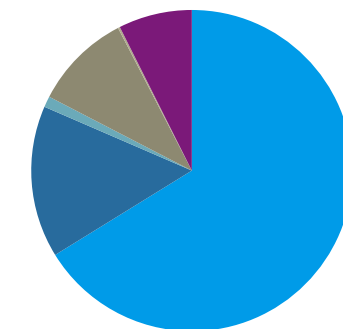
Wave 2 : January 2012
(12.69% mobile traffic)



Wave 3 : June 2012
(16.18% mobile traffic)



Wave 4: January 2013
(25.73% mobile traffic)



Website 1 appeals to an older age profile than the sample average but shows an above average increase in mobile traffic in the period. For the fourth time running, iPad is the favoured and fastest growing browsing device.

Nucleus Mobile Web Browsing Survey – Wave 4

Website 2

Insight 1:

Top 3 in terms of the mobile penetration in our sample of 10 travel websites

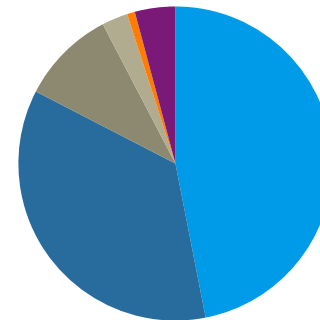
Insight 2:

iPad traffic accounts for over 77% of total mobile traffic to this site

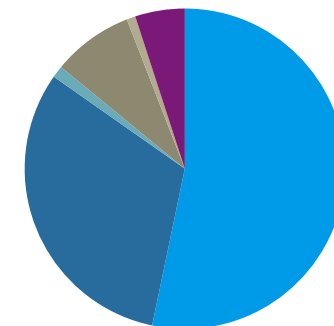
Insight 3:

Blackberry, iPod and Symbian browsing at very low levels and Android only registers 4.8%

Wave 1: June 2011*
(10.1% mobile traffic)

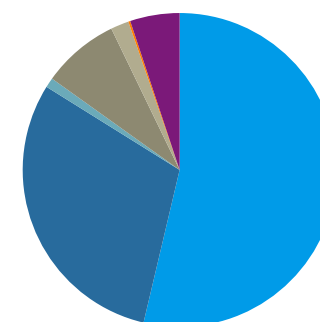


Wave 2: January 2012
(17.4% mobile traffic)

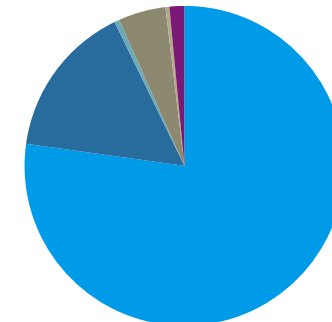


- iPad
- iPhone
- iPod
- Android
- BB
- Symbian
- Other

Wave 3: June 2012
(20.5% mobile traffic)



Wave 4: January 2013**
(30.1% mobile traffic)



The year-on-year figures are not representative as this site joined the survey in January 2013, so Wave 1-3 figures are an average for all sites. Nevertheless, this site shows the second highest iPad browsing in our sample, perhaps owing to the slightly older demographic than the sample average

Nucleus Mobile Web Browsing Survey – Wave 4

Website 3

Insight 1:

Mobile traffic up 27.8% since August 2012 and 144.8% increase since August 2011

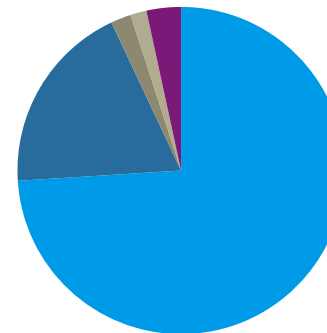
Insight 2:

iOS browsing has remained steady at 86%. iPad shows a slight decline, but iPhone grows steadily, representing 31.2% of all mobile browsing

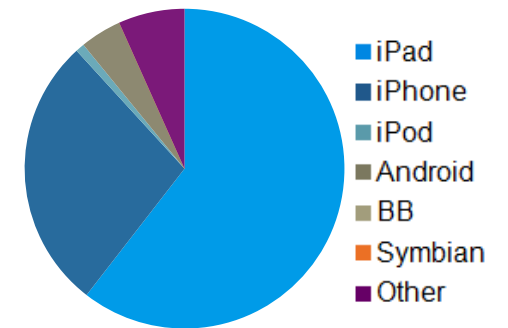
Insight 3:

Android's mobile share showing growth to 7.2% due to Samsung tablets

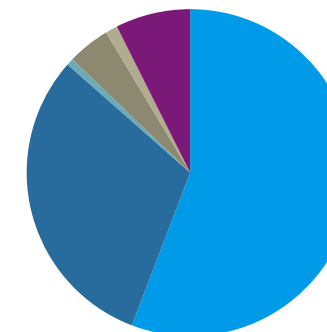
Wave 1: June 2011
(10.1% mobile traffic)



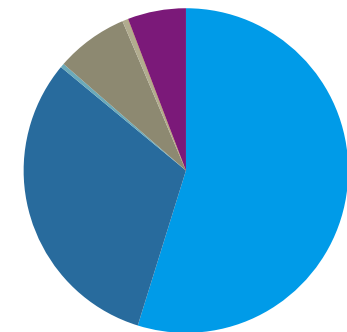
Wave 2: January 2012
(17.3% mobile traffic)



Wave 3: June 2012
(19.34% mobile traffic)



Wave 4: January 2013
(24.72% mobile traffic)



Website 3 illustrates how smartphones, particularly iPhones are critical for luxury websites and demonstrates why luxury brands in particular need to offer optimised websites for smaller touchscreen devices.

Nucleus Mobile Web Browsing Survey – Wave 4

Website 4

Insight 1:

Despite this luxury site not being a good mobile experience, penetration remains above the 30% mark, at 31.1% - our highest figure to date

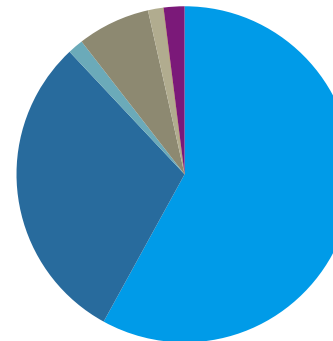
Insight 2:

iPad browsing dominates with huge 84.7% share and iOS taking 94.9% of all mobile traffic...

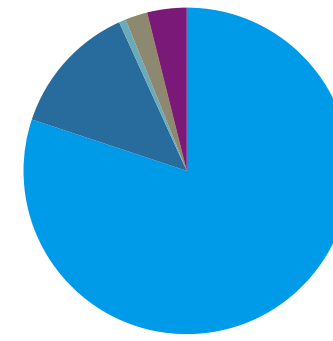
Insight 3:

Android grows from 1.6 to 2.6% of total mobile browsing, but still only accounting for a tiny percentage of mobile users

Wave 1: June 2011
(10.9% mobile traffic)

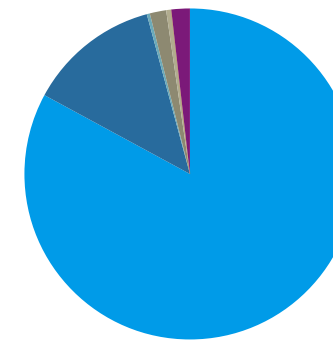


Wave 2: January 2012
(17.95% mobile traffic)

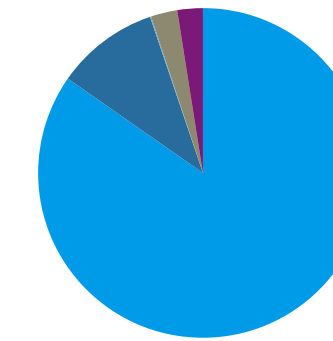


- iPad
- iPhone
- iPod
- Android
- BB
- Symbian
- Other

Wave 3: June 2012
(22.05% mobile traffic)



Wave 4: January 2013
(31.09% mobile traffic)



This luxury brand has yet to optimise itself for mobile, retaining Flash for its maps and video players. Even so, the growth in mobile traffic is hugely significant, especially for the luxury leisure market. Time to tune the experience for mobile users!

Nucleus Mobile Web Browsing Survey – Wave 4

Website 5

Insight 1:

Mobile traffic up 182% since our first study and over 50% in 12 months to 25.69% of all traffic

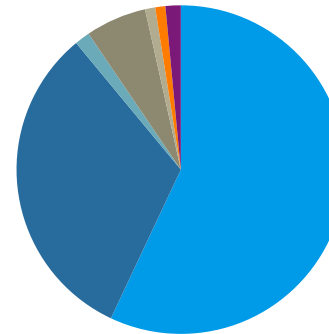
Insight 2:

iPhone browsing down -25% since August but iPad showing a steady 15.7% increase

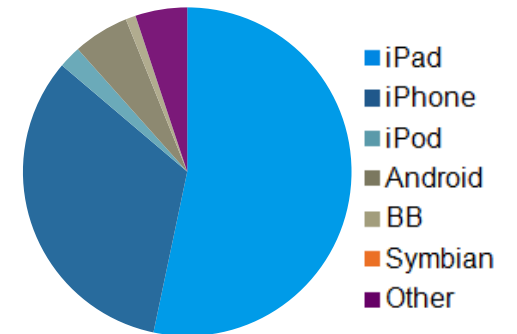
Insight 3:

Android share has doubled to 7.8%, but is still miles behind iOS devices, which together account for 88.2% of mobile traffic

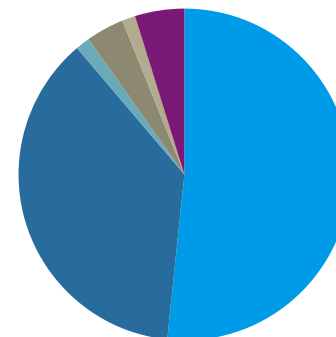
Wave 1: June 2011
(9.1% mobile traffic)



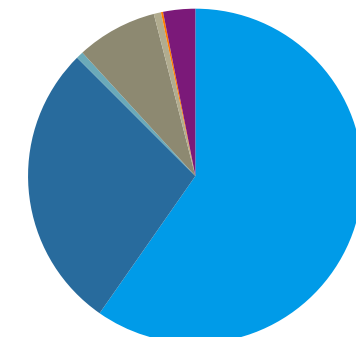
Wave 2: January 2012
(17.1% mobile traffic)



Wave 3: June 2012
(23.12% mobile traffic)



Wave 4: January 2013
(25.69% mobile traffic)



In the past 12 months mobile traffic to this luxury website has grown from 9.1% to 25.69% with a high proportion of international traffic and iOS particularly dominant

Nucleus Mobile Web Browsing Survey – Wave 4

Website 6

Insight 1:

Mobile traffic up 36.4% in the period, and up 155% since August 2011

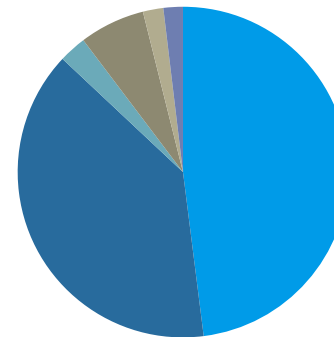
Insight 2:

iPad share grown only slightly, now accounting for 61.8% of all mobile traffic

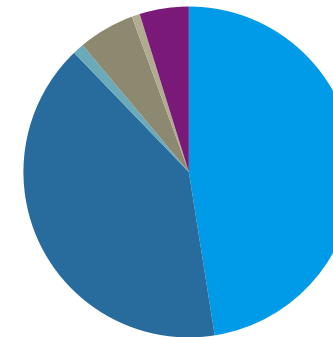
Insight 3:

iPad dwell times higher than average for PCs

Wave 1: June 2011
(10.1% mobile traffic)

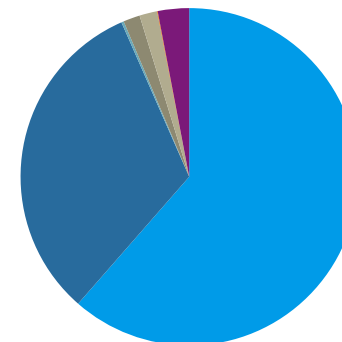


Wave 2: January 2012
(21.4% mobile traffic)

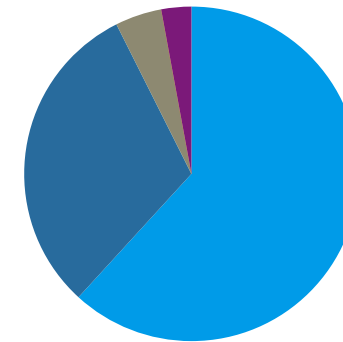


- iPad
- iPhone
- iPod
- Android
- BB
- Symbian
- Other

Wave 3: June 2012
(18.88% mobile traffic)



Wave 4: January 2013
(25.75% mobile traffic)



.....
This iPad 'native' site shows an above average increase in mobile traffic in the period

Nucleus Mobile Web Browsing Survey – Wave 4

Website 7

Insight 1:

This luxury hotel site has the oldest demographic in the survey, yet it accounts for the second highest mobile penetration in our sample

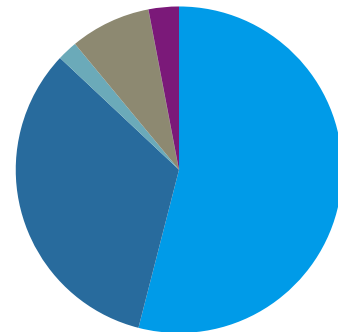
Insight 2:

iOS dominates again with a total of 86% of all mobile browsing from these devices

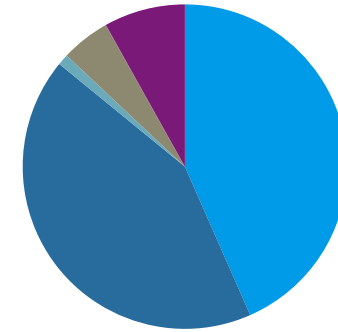
Insight 3:

Android achieves an above average 11.5%, perhaps due to a high percentage of US users and/or Samsung tablets

Wave 1: June 2011
(15.3% mobile traffic)

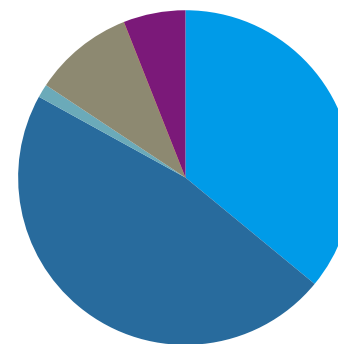


Wave 2: January 2012
(24.2% mobile traffic)

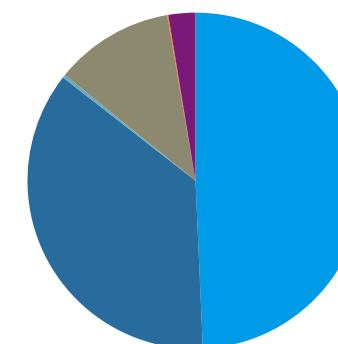


- iPad
- iPhone
- iPod
- Android
- BB
- Symbian
- Other

Wave 3: June 2012
(26.55% mobile traffic)



Wave 4: January 2013
(30.13% mobile traffic)



Overall mobile traffic to this site has nearly doubled from 15.3% in June 2011 to 30.13% in January 2013, representing a 96.9% increase in mobile browsing since the first study. With 11.5% of mobile users browsing on Android devices, Samsung may be making some inroads with the latest devices

Nucleus Mobile Web Browsing Survey – Wave 4

Website 8

Insight 1:

Total mobile traffic up 38%, averaging 29.83% of web browsing from mobile devices

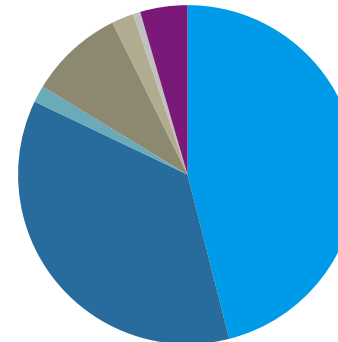
Insight 2:

Android's 14.5% share of mobile traffic in August has declined somewhat to 9.8% of mobile traffic in January 2013

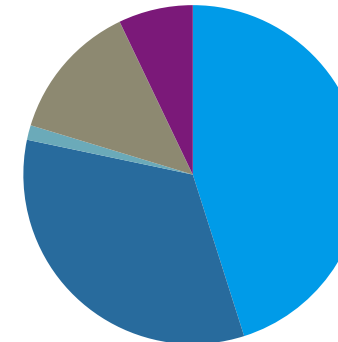
Insight 3:

BlackBerry and iPod penetration have almost fallen off the chart, and Symbian in death throes

Wave 1: June 2011*
(9.6% mobile traffic)

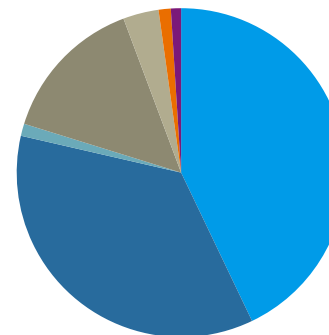


Wave 2: January 2012
(17.9% mobile traffic)

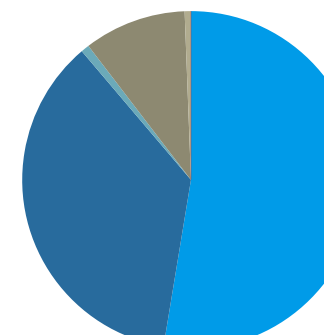


- iPad
- iPhone
- iPod
- Android
- BB
- Symbian
- Other

Wave 3: June 2012
(21.62% mobile traffic)



Wave 4: January 2013
(29.83% mobile traffic)



Overall mobile traffic to this site has grown by 38% in 6 months. The year-on-year figures are not representative as this site joined the survey in January, so Wave 1 figures are an average for all Wave 1 sites.

Nucleus Mobile Web Browsing Survey – Wave 4

Website 9

Insight 1:

This site has the lowest mobile penetration in the survey once again, but is still over 20% of all traffic

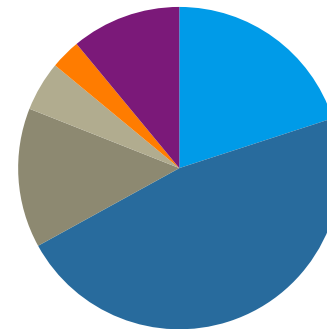
Insight 2:

iOS devices account for 'only' 77.5% of mobile browsing, with the iPad accounting for over half of all mobile traffic

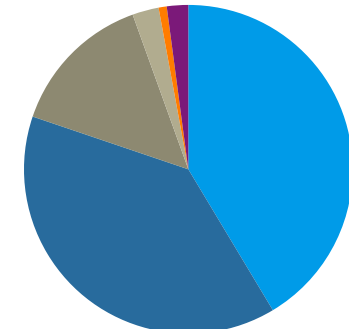
Insight 3:

Android traffic share up from 9.8% to 14.1% while BB has yet again shown significant decline, now down to just 1%

Wave 1: June 2011
(8.9% mobile traffic)

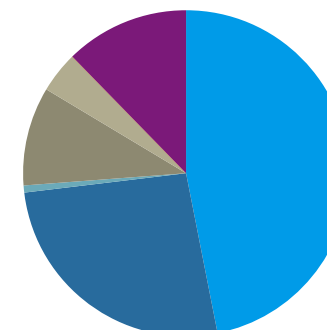


Wave 2: January 2012
(10.89% mobile traffic)

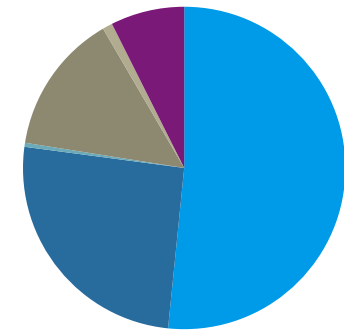


- iPad
- iPhone
- iPod
- Android
- BB
- Symbian
- Other

Wave 3: June 2012
(15.1% mobile traffic)



Wave 4: January 2013
(20.3% mobile traffic)



This hotel group has an international business and leisure audience, which may explain the higher penetration of Android and Blackberry browsers and the, relatively, lower iOS share.

Nucleus Mobile Web Browsing Survey – Wave 4

Website 10

Insight 1:

42.8% growth in mobile browsing since Wave 3 in summer 2012, now 27.6% of all traffic

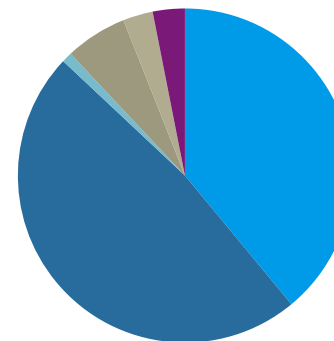
Insight 2:

iPhone share rises to 30.5% of all traffic. iOS share dips a bit but still over 90% of all mobile traffic

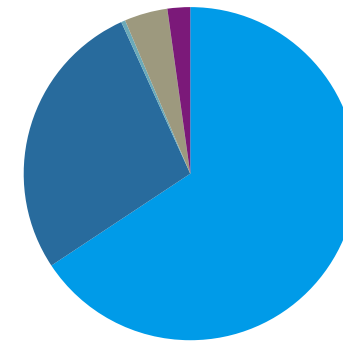
Insight 3:

Android up from 4.25% to 6.1%, but results still no higher than in Wave 1

Wave 1: June 2011
(10.3% mobile traffic)

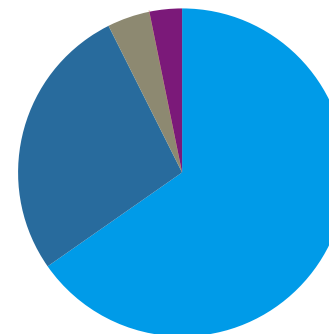


Wave 2: January 2012
(19.9% mobile traffic)

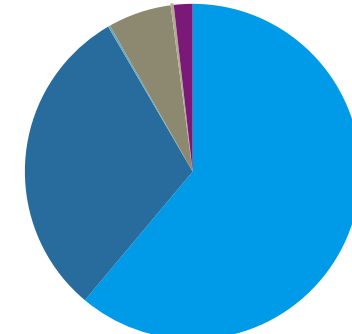


- iPad
- iPhone
- iPod
- Android
- BB
- Symbian
- Other

Wave 3: June 2012
(19.3% mobile traffic)



Wave 4: January 2013
(27.6% mobile traffic)



Huge 91.8% iOS share is consistent with a luxury leisure target audience and a premium browsing experience.

Nucleus Mobile Web Browsing Survey – Wave 4

Conclusions

Mobile website browsing has leapt once more as previously forecast, now accounting for an average of 27.1% of total browsing. This is an increase of 32.2% since June 2012 and accelerating over the previous 6 months.

Apple's iOS platform has never been stronger with **iPad becoming the web browsing device of choice, accounting for an average of 62% of all mobile devices** and has demonstrated that the new iPad and iPad Mini have a commanding lead in the tablet market, which even Samsung is unable to make significant inroads on.

As anticipated, 3 of the luxury brands in our study have recorded **more than 30% of all traffic coming from mobile devices**, on track for >50% penetration by end-2014.

Clearly, we now live in the Mobile era.

Nucleus Mobile Web Browsing Survey – Wave 4
Nucleus mobile website capabilities

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

With leading-edge experience of 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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List of references

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(Notable quotes: 'mobile is not an option; it's an inevitability'; Mark Zuckerberg talks of building 'really good **mobile-first experiences**'... 'the torch has been passed to a **new generation of computing** at Facebook, and it doesn't involve the traditional PC')

Mary Meeker's Internet Trends Report – Year-end 2012

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The birth of the Mobile era...

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