Methodology

Report based on aggregate and anonymous data across retail, media, entertainment, financial service, and travel websites.

Behavioral data from Adobe Marketing Cloud solutions; website traffic trends via Adobe Analytics and mobile app usage patterns from Adobe Mobile Services.

- 18+ billion visits to U.S. consumer facing websites in June, 2014.
- More than 1 trillion visits since 2008.
- 700 million mobile app use sessions.
- 10,000+ US websites and apps under measurement.

Survey (Sentiment) Data:

- Over 3000 mobile users spread across US, Canada, UK, France & Germany.
- Over 100 mobile marketers working for US companies.
Key findings

1. iPhone screen size has to increase: Without the introduction of a larger phone, Apple’s browser share will decline further. Consumers prefer to browse on phones with 5” or larger screens. Browsing on 4” devices fell by 11% YoY.

2. Pinterest is the most mobile social network: Outpacing Facebook, Pinterest is the most mobile social network with 64% of its referred traffic coming from mobile browsers. Tumblr referrals produce the highest revenue per visit (RPV) from mobile devices – well ahead of Facebook.

3. iMessage sharing up 259%: Users of digital magazine apps use person-to-person article sharing via text messaging twice as often as sharing via Social. While iMessage sharing is up, sharing via Facebook is down 43%.

4. Cellular networks on decline: For the first time, more than 50% of web browsing via smartphones and 93% of browsing via tablets come from wi-fi.

5. Bounce rates high on mobile: Bounce rates for referrals from social networks are much higher on mobile devices than desktops – 61% vs. 53%. Marketers are cautioned to track mobile ad bounce rates.
Screen size and browsing share

Without larger screen phone, Apple's browser share will further decline.

- Phones with larger screens (>4") drive higher web traffic than ever before.
- Browsing on smaller phones (≤4") down over 11% YoY.

Tablet browsing has flattened.

- A year ago, tablet browsing surpassed smartphones and was expected to continue to outpace smartphones.
- Consumers choose to browse more on bigger screen phones now than tablets.

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MOBILE WEB

Mobile browsers

Chrome has grown at the expense of Safari and Android Browser.

- Chrome's share up 5.7%.
- Safari’s share fell by 2.6%.
- Android Browser’s share fell 0.9%.

Safari still drives more traffic than all other mobile browsers combined.
MOBILE WEB

Browsing share by device manufacturer

Apple still drives the majority of mobile visits to U.S. websites.
• iPhone drives 54% of smartphone traffic.
• iPad drives 80% of tablet traffic.

Samsung is #2 for both smartphone and tablets.
• Besides Apple, Samsung users browse more than all other smartphone users combined.

3rd place is up for grabs.
• Amazon tablets are the third most popular with 5% of visits.
• For Smartphones, LG follows Apple and Samsung.
MOBILE WEB

Mobile and social networks

- 64% of Pinterest’s referred traffic comes from mobile browsers, ahead of Facebook.
- 62% of Twitter referrals are from tablets and smartphones.
- 36% of all social referred visits to retailers come from a tablet or smartphone.

Tumblr referrals produce highest revenue per visit (RPV) from mobile devices.

Bounce rates for referrals from social networks are higher on mobile devices than desktops (61% vs. 53%).
MOBILE APPS

Content sharing

Personalized content sharing (text messaging, email) is more popular than group sharing via Social – 70% vs. 30%.

- iMessage sharing up 259%.
- Pinterest sharing up 131%.
- Email sharing up 5.2%.
- Facebook sharing down 42.6%.
- URL link sharing down 26.8%.
- Twitter sharing down 22.6%.
Cellular vs. wi-fi

As cell data charges increase, more consumers choose to browse via wi-fi.

- Over 50% of smartphone browsing now comes from wi-fi.
- 93% of tablet browsing uses wi-fi rather than cellular data.
MOBILE SURVEY

Mobile geo targeting trends

iBeacons and Geo targeting are becoming mainstream.

- iBeacons: 18% of mobile marketers already use Apple iBeacons (Expected to double in '15 to 36%).
- Geo targeting (GPS): 49% of marketers already use device position to deliver content (37% plan to add it over next 12 months).

“Mobile Elite” user trends.

- 22% used mobile wallets in last 3 months (14% of average mobile users).
- 13% used apps with augmented reality in last 3 months (9% of average mobile users).
- 36% used mobile assisted in-store shopping (33% of average mobile users).
MOBILE SURVEY

Mobile app publishing trends

- 53% of companies have 1-10 mobile apps (17% have 40+ mobile apps for download).
- iOS apps lead with 67% of respondents publishing to the Apple App Store (Google Play 61%).
- Only 3% of companies admit to only refreshing mobile apps annually or less often.

On average, mobile marketers spend:

- $5.5 million/year on mobile app.
- $4.9 million/year on mobile websites.