STATE OF MOBILE WEB

US

FEBRUARY 2018
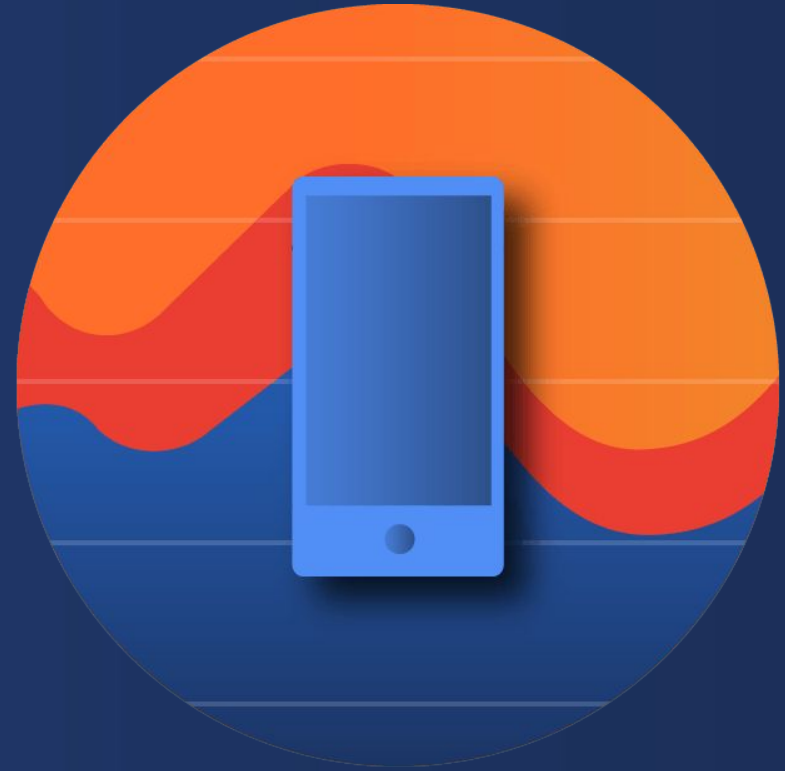
CONTENTS

Methodology

This whitepaper looks at the share of mobile traffic to the top 100 websites in the United States in 2017. Delving deeper, we look at the top 100 sites in each of three industry verticals:

- Shopping
- Travel
- Finance

The top sites are determined by the average monthly volume of traffic combined over desktop and mobile. In each instance we looked at the relative share of mobile traffic to desktop traffic and the sources of that traffic.

Mobile traffic refers to visits to the mobile-enabled version of a website and does not include mobile apps.

INTRODUCTION

Patterns of mobile web behavior in the US vary across different industry categories. As the distribution of traffic sources and the levels of engagement differ, so too do the challenges and opportunities for mobile success.

KEY TAKEAWAYS

1. Most sites now receive the majority of their traffic on mobile rather than desktop. As this trend continues, engagement of mobile users is the key battleground for sites in all categories.

2. Direct traffic on mobile is less valuable as an indication of brand strength due to different user behavior. Instead, the relative proportions of branded and non-branded search reveal strategies for branding and user acquisition.

3. Optimized search is vital for building an engaged mobile audience. Identifying the right non-branded keywords for paid and organic search helps to improve user engagement.

4. While paid search has long been a valuable acquisition channel for high-value products and services, mobile referrals are increasing, potentially overtaking desktop referrals as a source.
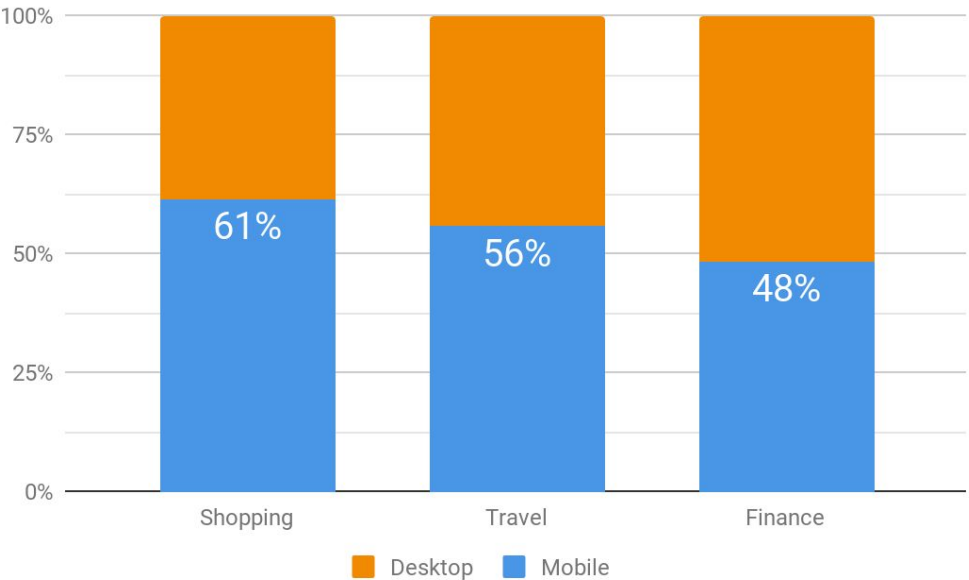
Mobile vs. Desktop

As the volume of traffic to the top US sites continues to increase, the key source of that growth in the past few years has been mobile rather than desktop. Of the three categories we looked at, only Finance still receives the majority of visits on desktop by a small margin.

As consumers become more comfortable searching and purchasing on mobile, sites must optimize their mobile user experience to equal and surpass the experience on desktop to match demand.

Traffic to the Top 100 Sites

MOBILE ENGAGEMENT

Traditionally, mobile sites have seen lower engagement than their desktop counterparts, but each industry vertical faces a different set of obstacles.

Despite having the lowest proportion of mobile traffic, Finance sites enjoy lower bounce rates than Shopping or Travel sites. This may be due to a higher proportion of direct traffic vs. search traffic as consumers arrive at a Banking, Insurance or Personal Financial Management site knowing exactly what they are looking for. But low bounce rate to Finance sites is coupled with fewer pages per visit and less time on site per visit than other verticals, suggesting that there is plenty of room to improve engagement in this space.

Bounce Rate by Vertical - Mobile vs. Desktop
2017
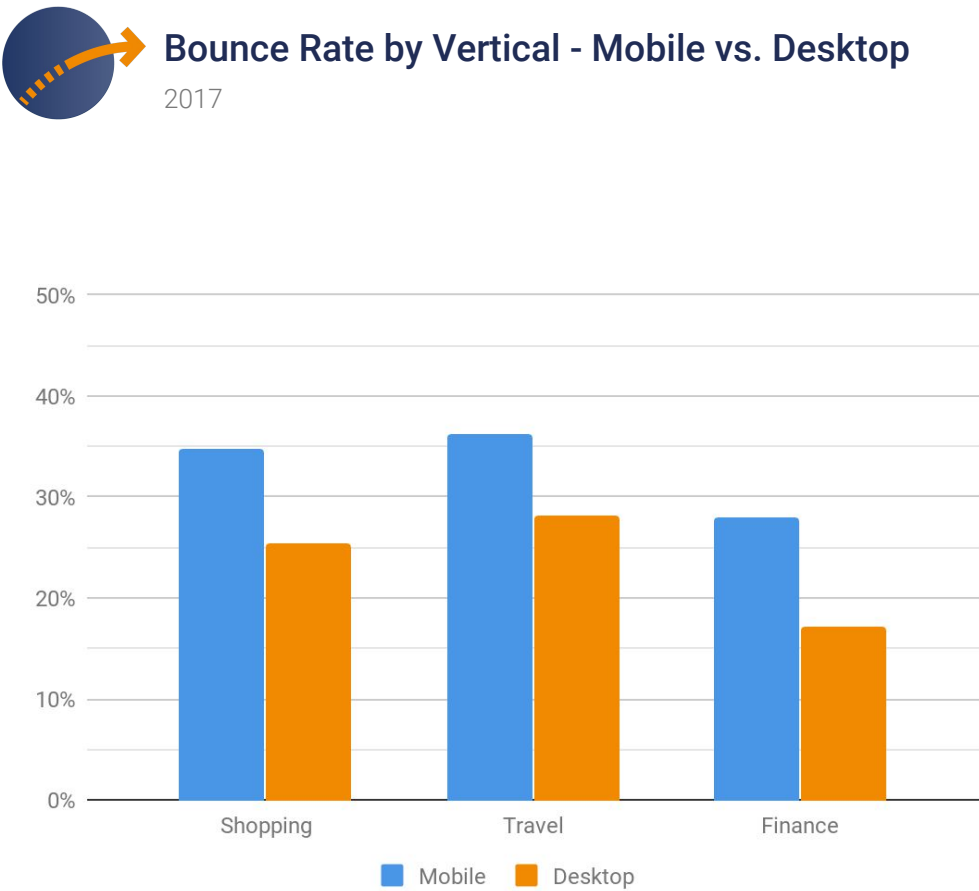
Case Study #1
JCPENNEY

JCPenney may have been founded 115 years ago, but it is fully invested in modern day strategies for digital excellence. Having adopted an omnichannel approach to selling, an estimated 77% on online orders in 2016 touched a physical store.

With over 67% of all traffic to jcpenney.com coming from mobile rather desktop, the site is committed to driving mobile engagement and optimizing the experience for every visitor.

Bounce Rate on Mobile and Desktop
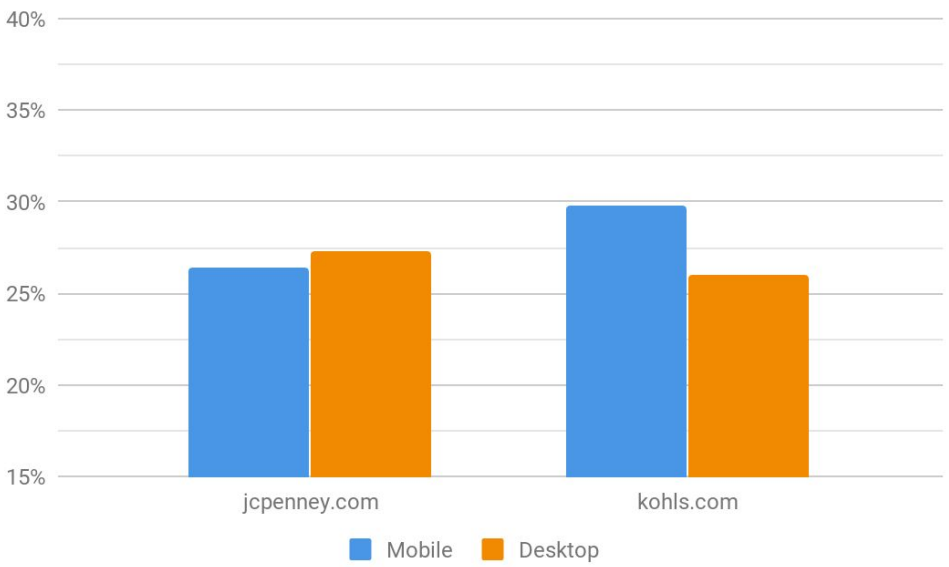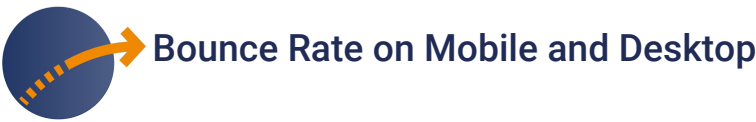
MOBILE SEARCH

Both jcpenney.com and kohls.com see more traffic on mobile than desktop. In both cases the proportion of that traffic coming from paid and organic search is higher on mobile than on desktop. The key difference between their strategies is the proportion of that mobile search traffic which is branded vs. non branded.

At kohls.com 80% of mobile search traffic comes from branded keywords, like *kohls*, *kohls coupons* and *kohls credit card*. In contrast, Over half of all mobile search terms to jcpenney.com are non-branded, including *nike shoes*, *liz claiborne* and *wedding guest dresses*. This investment in targeted search contributes to broad user acquisition and increased engagement for each visitor.
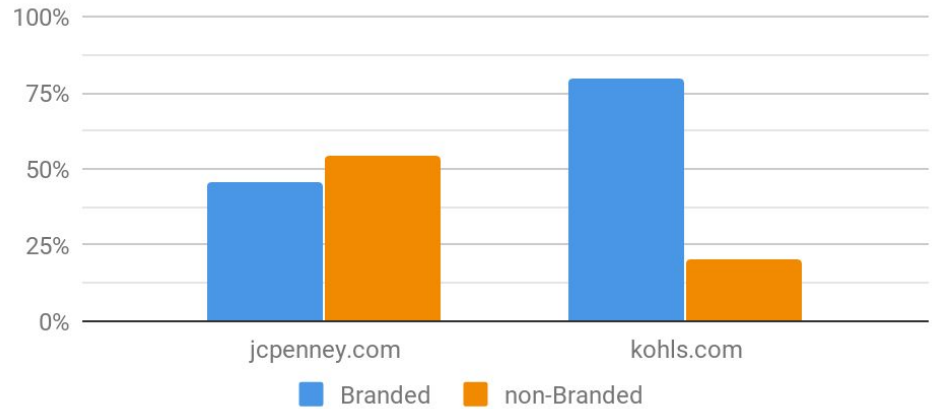
JCPenney Search Share on Mobile and Desktop
(2017)

Mobile Desktop
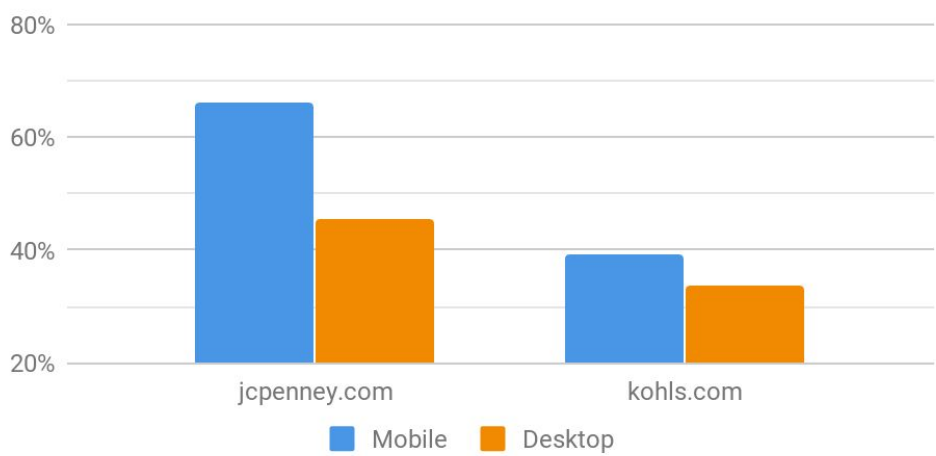
JCPenney Mobile Search - Branded vs. Non-branded
(2017)

Branded non-Branded

Case Study #2
BOOKING.COM

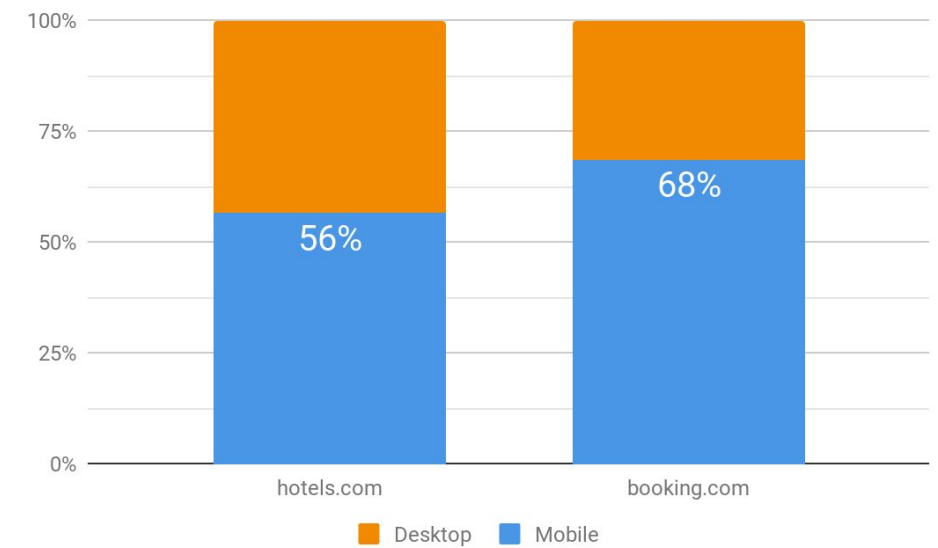In 2005 the Priceline group purchased booking.com for around $130M. Last year it was estimated that booking.com generated over $8B in annual revenue, around 85% of Priceline's revenue.

In the US, the top 100 Hotels & Accommodation sites average a 60% mobile share of all traffic. For booking.com the mobile share is 68%.

Hotels.com and Booking.com Mobile Share
(2017)

MOBILE ENGAGEMENT:
BOOKING.COM VS. HOTELS.COM

Both booking.com and hotels.com posted engagement metrics that outperformed the top 100 site in the Hotels & Accommodation category. At hotels.com the bounce rate for mobile traffic was lower than for desktop traffic but both sites came in below the 42% average for the category.

Looking at visit duration, time spent at booking.com exceeded time on hotels.com by 11%, but visits to both sites were around two minutes longer than the category average.
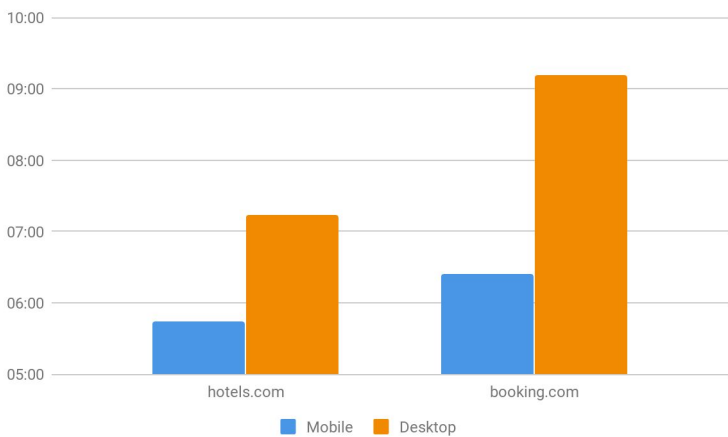
Bounce Rate
Mobile and Desktop

Avg. Visit duration
Mobile and Desktop

MOBILE SEARCH

Both booking.com and hotels.com see a higher proportion of traffic from search on mobile rather than desktop. But they have each implemented different strategies for their search traffic.

Mobile search to hotels.com comprises 62% non-branded keywords. At booking.com this figure rises to 93% indicating a highly sophisticated keyword strategy that optimizes mobile search for diverse terms such as *cheap hotels*, *motels near me* and *las vegas hotels* to deliver an engaged audience with higher purchase intent.
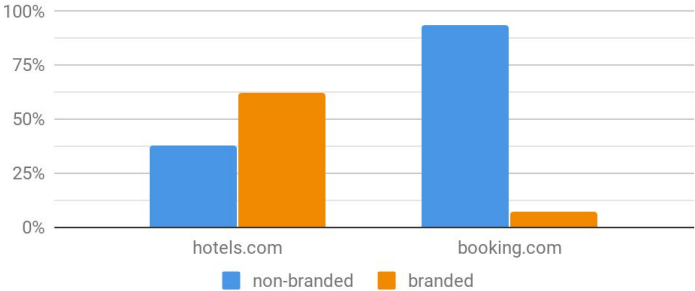
Search vs. Referrals on Mobile
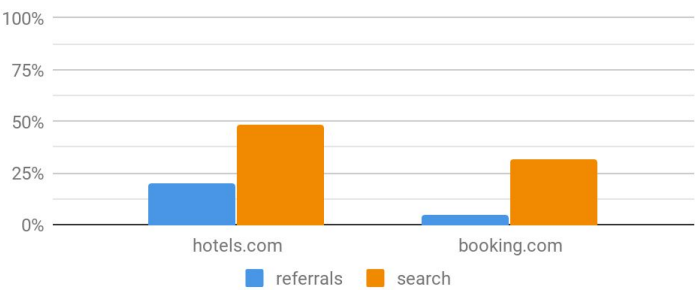
Search vs. Referrals on Desktop
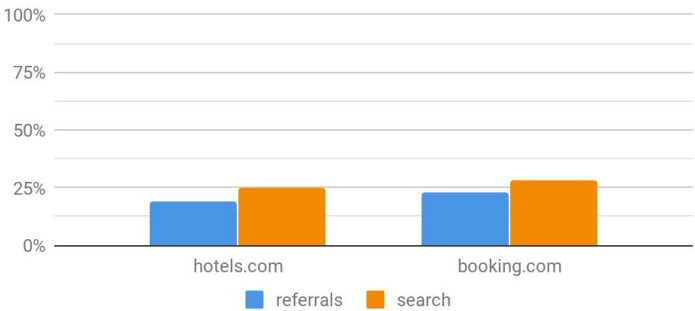
Branded vs. Non-branded Keywords

About
SIMILARWEB

SimilarWeb is the standard for understanding the digital world. With the largest international online panel consisting of hundreds of millions of devices, SimilarWeb provides granular insights about any website or app across industries. Global brands such as Google, HSBC, eBay, and adidas rely on SimilarWeb to understand, track and grow their digital market share.

Knowing your market means knowing your competitors. SimilarWeb offers breadth and depth of digital market intelligence.

Contact Us
To arrange a live demo with a SimilarWeb Consultant
www.similarweb.com | info@similarweb.com