A Billion Mobile Sites Spark No Joy

Responsive Retrofits Aren't Enough To Serve Customers In Their Mobile Moments Of Need

by Ted Schadler and Danielle Geoffroy
September 29, 2016

Why Read This Report

Everybody has their favorite apps. But can you name even three mobile websites you like? We can't. It's because responsive retrofits to 20-year-old desktop web designs fail to serve us in our mobile moments of need. That's a shame because even with lousy sites, web traffic around the world will be majority-mobile by 2019. eBusiness pros have a choice: Hand your mobile moments over to a bunch of apps you don't own, or do a radical reset of your mobile web strategy. This report carries the evidence to convince your company to make your mobile website a first-class citizen.

Key Takeaways

Smartphone Traffic Will Dominate The World Wide Web In 2019
Smartphones are becoming the first screen for the world's 1 billion websites. Akamai Technologies' data shows that in some markets, the web is already majority-mobile. Globally, we forecast that web traffic will be majority-mobile in 2019.

Sadly, Despite The Traffic, The Mobile Web Sparks No Joy
Everybody has a home screen full of their favorite mobile apps. And just four apps consume 72% of people's entire monthly budget of mobile moments. But with a billion websites out there, can you name three mobile websites you love? We can't. To find how to reinvent your website for mobile moments, we are interviewing 60 of the best digital businesses on the planet. In the meantime . . .

Take Pitchforks To Cupertino And Must-Have Feature Lists To Mountain View
In our interviews with major brands, tech vendors, and some brilliant web developers, it's become clear to us that Apple's slow adoption of mobile web technology is holding us all back. If you have a voice, you should be demanding that Apple join with Google, Microsoft, Opera, and Samsung to reinvent the browser for the mobile web.

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by Ted Schadler and Danielle Geoffroy
with Martin Gill, Julie A. Ask, Michael Facemire, Mark Grannan, Thomas Husson, Allison Cazalet, and Peter Harrison
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Notes & Resources

Forrester spoke with 53 companies and drew on data from Akamai Technologies, Cisco Systems, comScore, Forrester, and StatCounter for this report.

Related Research Documents

Brief: Embrace Responsive+ Web Design

Brief: Mobile-First Demands More Than Basic Responsive Web Design

The Future Of Mobile: From App Silos To Open Ecosystems

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Smartphone Traffic Will Dominate The World Wide Web In 2019

In three years, smartphone traffic will dominate the web. In some markets, it already does. If eBusiness professionals want to win, serve, and retain customers in their mobile moments of need, they need to help their firms embrace this mobile reality — and not just with an app. This report contains the evidence to convince your company to reinvent its website for mobile moments.

Smartphones are already in the hands of 70% of US online consumers and 40% of global consumers — and on the way to 64% global adoption in 2021.[1] Coupled with the rise of wireless and cellular networks, that opens the door to smartphones becoming consumers' first screen for the world's 1 billion websites.

› **In some markets, the web is already majority-mobile.** Akamai Technologies' data from mid-2016 shows that in the media and retail industries in some markets, more than 50% of web traffic is from smartphones (see Figure 1-1). In Japan, 70% of retail traffic is through mobile web, and 64% of Great Britain's media and entertainment traffic is via mobile web. What's your traffic? Is it limited by your audience? Or your mobile web experience? Even in markets like utilities and manufacturing, mobile web traffic is on the rise. Schneider Electric reports that making its website mobile-friendly lit a fire under smartphone traffic.

› **The global web will be majority-mobile by 2019.** Starting with StatCounter's data, we built a forecast for global website traffic from smartphones based on drivers like smartphone and wireless adoption, the availability of responsive websites, and the presence (or lack thereof) of PCs and broadband. We project that global web traffic from smartphones will reach 52% in 2019 on its way to 70% by 2025 (see Figure 1-2). (Note: This forecast doesn't include tablets, which would only increase the volume of web traffic from mobile devices.)

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FIGURE 1 Smartphone Traffic Will Dominate The World Wide Web In 2019

1-1   **Web traffic is already majority-mobile in many markets**

Percentage of web page views in the 12 months ending July 1, 2016, from smartphones for Akamai Technologies customers

	Australia	China	France	Germany	India	Japan	United Kingdom	United States
Total	46%	39%	34%	38%	35%	58%	51%	14%
Financial services	36%	43%	31%	27%	27%	43%	40%	23%
High tech	45%	19%	34%	34%	39%	28%	47%	34%
Hotel and travel	40%	28%	31%	32%	36%	51%	43%	37%
Media & entertainment	42%	41%	41%	47%	37%	49%	61%	49%
Retail	50%	45%	33%	36%	30%	70%	53%	42%
Consumer goods	69%	35%	37%	44%	25%	64%	58%	48%
Manufacturing	31%	19%	23%	23%	38%	25%	37%	47%
Automotive	34%	44%	30%	26%	29%	33%	31%	36%
Public sector	32%	11%	23%	26%	29%	23%	36%	26%
Business services	15%	47%	14%	15%	35%	17%	16%	19%
Software-as-a-service	10%	18%	11%	13%	21%	11%	10%	9%

Base: Akamai Technologies customers who have opted into tracking for the number of page views from smartphones
Source: Akamai Technologies

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FIGURE 1 Smartphone Traffic Will Dominate The World Wide Web In 2019 (Cont.)

1-2   **The global web will be majority-mobile in 2019**

Global smartphone adoption and mobile web traffic
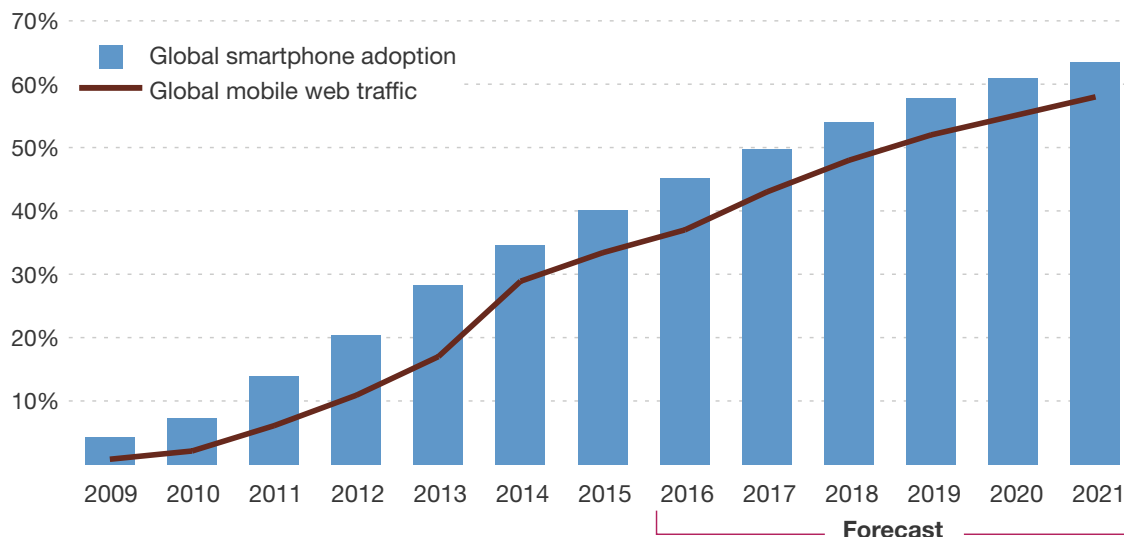
Source: Forrester Data
Source: StatCounter for global mobile web traffic from 2009 to 2015

Sadly, Despite The Traffic, The Mobile Web Sparks No Joy

Everybody has a home screen full of their favorite mobile apps. And just three apps consume 60% of people's entire monthly budget of mobile moments.[2] But with a billion websites out there, can you name three mobile websites you love? We can't. The evidence that the mobile web sparks no joy is powerful — and it depresses me:

> › **Even as the mobile web audience expands, the average time on mobile sites shrinks.**
> Forrester Data shows that app use is up from 2 hours per day in 2015 to 2.2 hours per day today.[3] But people spend 60% of their time in only three apps — and only 22% of that time across all mobile sites! And as comScore's data on the top 1,000 US websites shows, even as the mobile web audience grows, the average time people spend on those sites falls (see Figure 2-1). That's damning evidence that mobile websites en masse spark no joy.[4]

> › **Performance, content, and lousy layouts plague mobile web experiences.** Consumers turn to the mobile web for quick-hit tasks like searching, researching, and price shopping, but they are often disappointed as poor performance, unfriendly content, lousy layouts, and crappy data

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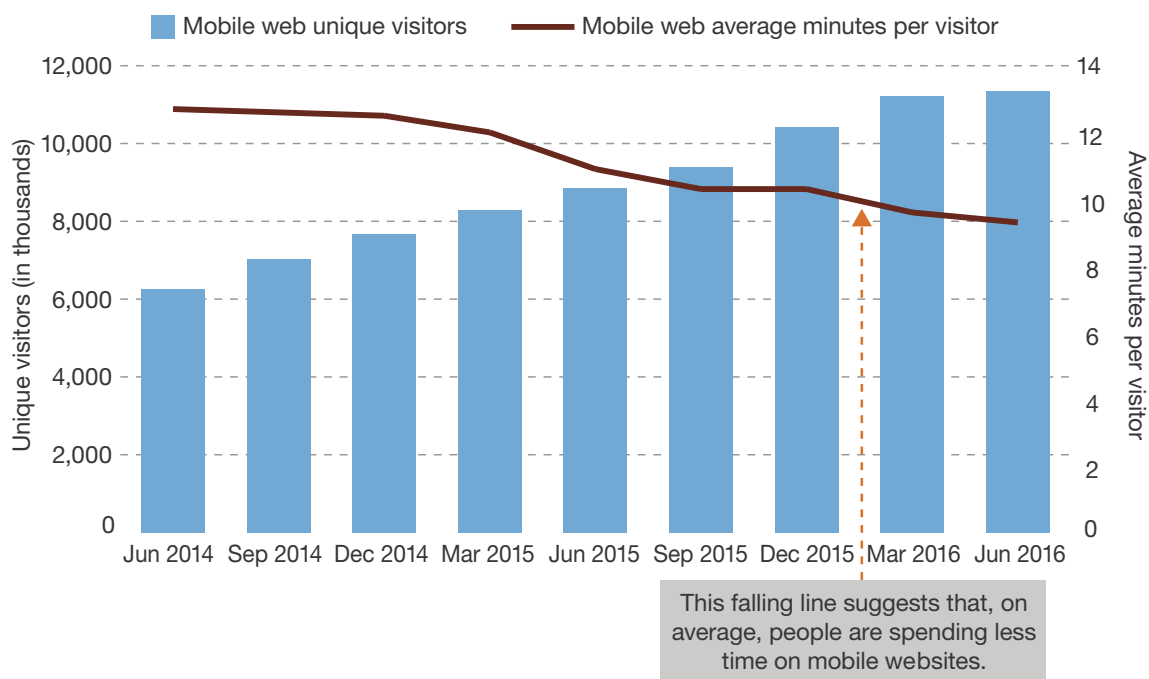Responsive Retrofits Aren't Enough To Serve Customers In Their Mobile Moments Of Need

entry plague mobile web experiences (see Figure 2-2).[5] To be fair, 38% of consumers report none of these problems, which makes joyless mobile web experiences more like a sore throat than the swine flu — a tyranny of low expectations.

› **Far too often, companies lose out on mobile web moments.** The impact of a joyless web experience is defection (see Figure 2-3). Consumers diligent in pursuing their task turn to the desktop web. But most abandon the field. In almost every case, you have lost yet another mobile moment. That can't be good for your business — or for humankind. Jeremy Lockland, head of mobile at Razorfish, stated this simply: "Allowing your customers to start a workflow on their phone but not ensuring they can complete it without jumping through mobile-unfriendly hoops — that's an awful customer experience."

FIGURE 2 Evidence Mounts That The Mobile Web Sparks No Joy

2-1   **Mobile web reach is growing even as average mobile web time is shrinking**

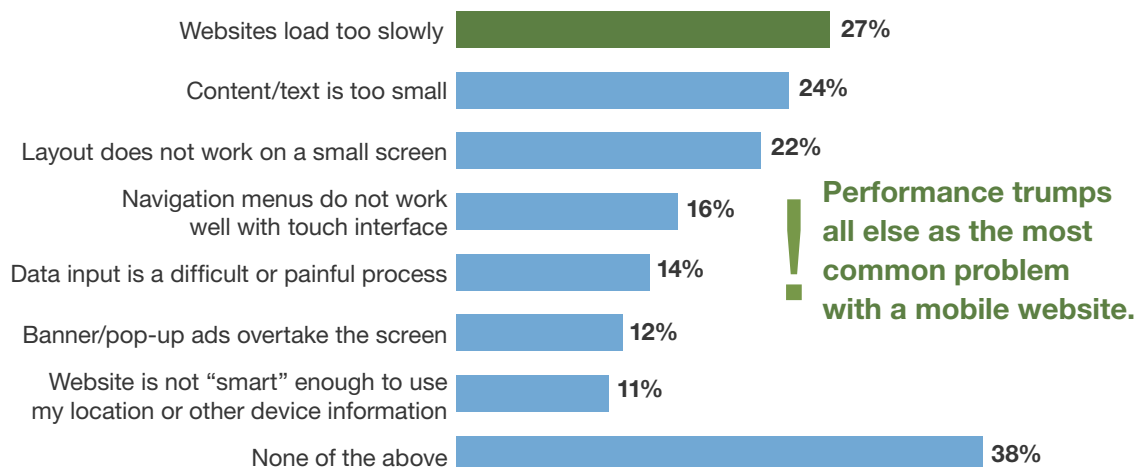**Top 1,000 mobile web properties: average audience and time spent**

Source: comScore Mobile Metrix, US, ages 18+

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FIGURE 2 Evidence Mounts That The Mobile Web Sparks No Joy (Cont.)

2-2   Performance, content, and lousy layouts plague mobile web experiences

"While using your mobile web browser, what are the most common problems that you encounter?"
(Select all that apply)

Websites load too slowly	**27%**
Content/text is too small	**24%**
Layout does not work on a small screen	**22%**
Navigation menus do not work well with touch interface	**16%**
Data input is a difficult or painful process	**14%**
Banner/pop-up ads overtake the screen	**12%**
Website is not "smart" enough to use my location or other device information	**11%**
None of the above	**38%**

Performance trumps all else as the most common problem with a mobile website.

Base: 3,035 online adults

Source: Forrester's North American Consumer Technographics® Devices And Telecom Online Benchmark Recontact Survey, 2015

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FIGURE 2 Evidence Mounts That The Mobile Web Sparks No Joy (Cont.)

2-3   Companies are losing the mobile web moments they should be winning

"When you encounter problems accessing the web from your mobile browser, what are you most likely to do as a result?"

Base: 1,884 online adults who have had a problem with a mobile website
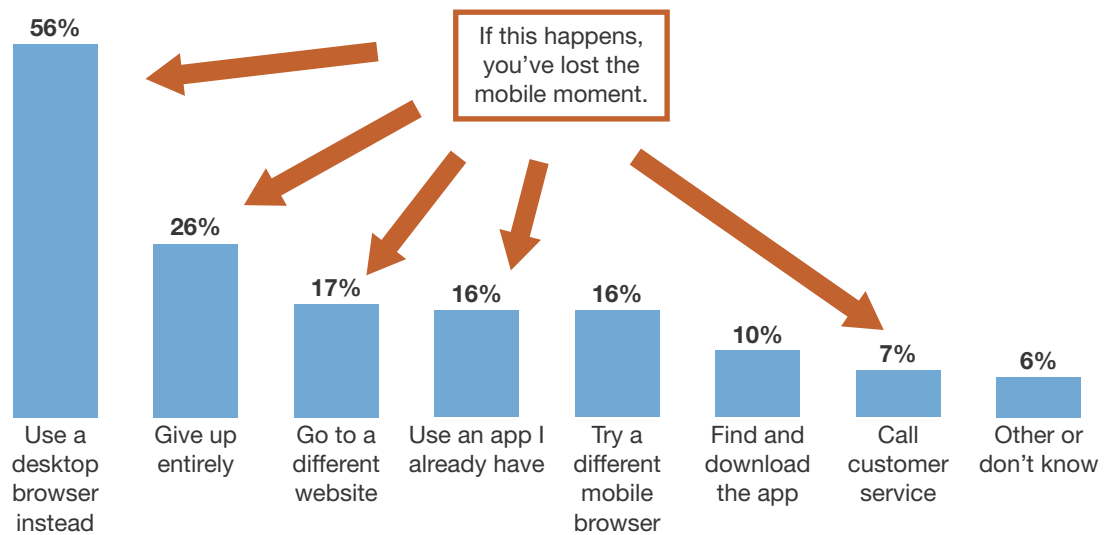
Source: Forrester's North American Consumer Technographics® Devices And Telecom Online Benchmark Recontact Survey, 2015

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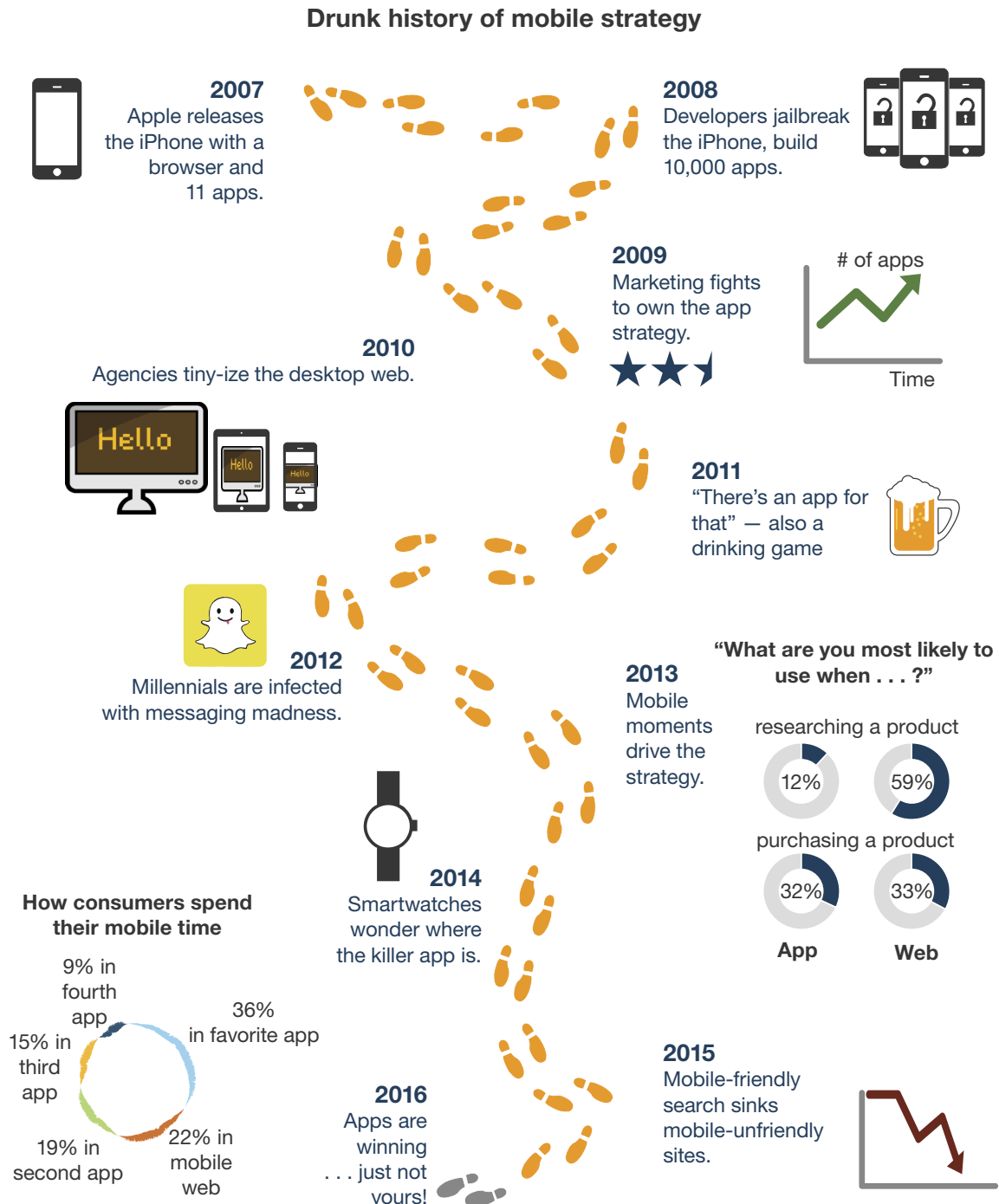## A Drunk History Of Mobile Strategy

How did we get here? Why do the responsive retrofits we've done deliver such joyless experiences? We've been questing for mobile success for almost 10 years. But in retrospect, it feels like we've all been on a drunken quest, too often chasing fads. First, pinch-and-zoom web. Then jailbroken apps. Then more apps — mostly unused. Then one-size-fits-all responsive web. Then messaging. Then watches. You and your customers have been whipsawed in the drunk history of mobile strategy, including these milestones (see Figure 3):[6]

› **2008: "There's an app for that."** Savvy developers jailbroke the first iPhone so they could build apps. Apple then launched the Apple App Store and rewarded developers for radically reinventing mobile experiences as mobile moments. The app gold rush was on as every Tom, Dick, and Harry took a swing at an app. A pub game called "there's an app for that" seized the imagination of mobile strategists. Apple trademarked it. The result was app chaos and disjointed digital experiences.

› **2010: Responsive retrofits tiny-ize websites but miss the mobile moment.** Agencies and creative developers swooped in to magically morph brands' giant desktop websites into "mobile-friendly" websites. But it was usually a one-size-fits-all strategy, and it failed to meet consumers' needs in a mobile moment.[7] This is the unspoken crisis of the mobile web: Responsive alone is not enough. Rare is a company like United Airlines that builds one web experience for smartphones and another for desktops.[8]

> Apps are winning . . . just not yours.

› **2016: Apps are winning . . . just not yours.** Consumers used 26 apps last year and 26 apps this year.[9] Millennials use only 28 apps. Consumers have enough apps — they don't want more. What's worse, they spend 72% of their total mobile time (web and app) in only four apps — owned mostly by Facebook and Google. It turns out that apps are only for your best customers, and even then, only when they need you a lot. Even Amazon has only 19% of online American consumers using its app, while 40% of them use its mobile website.[10]

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FIGURE 3 A Drunk History Of Mobile Strategy

Drunk history of mobile strategy

2007 Apple releases the iPhone with a browser and 11 apps.

2008 Developers jailbreak the iPhone, build 10,000 apps.

2009 Marketing fights to own the app strategy.

# of apps / Time

2010 Agencies tiny-ize the desktop web.

2011 "There's an app for that" — also a drinking game

2012 Millennials are infected with messaging madness.

2013 Mobile moments drive the strategy.

"What are you most likely to use when . . . ?"
researching a product — 12% App, 59% Web
purchasing a product — 32% App, 33% Web

2014 Smartwatches wonder where the killer app is.

How consumers spend their mobile time
36% in favorite app
22% in mobile web
19% in second app
15% in third app
9% in fourth app

2016 Apps are winning . . . just not yours!

2015 Mobile-friendly search sinks mobile-unfriendly sites.

Source: "Master Your Customers' Mobile Pathways" Forrester report and "Your Customers Will Not Download Your App" Forrester report

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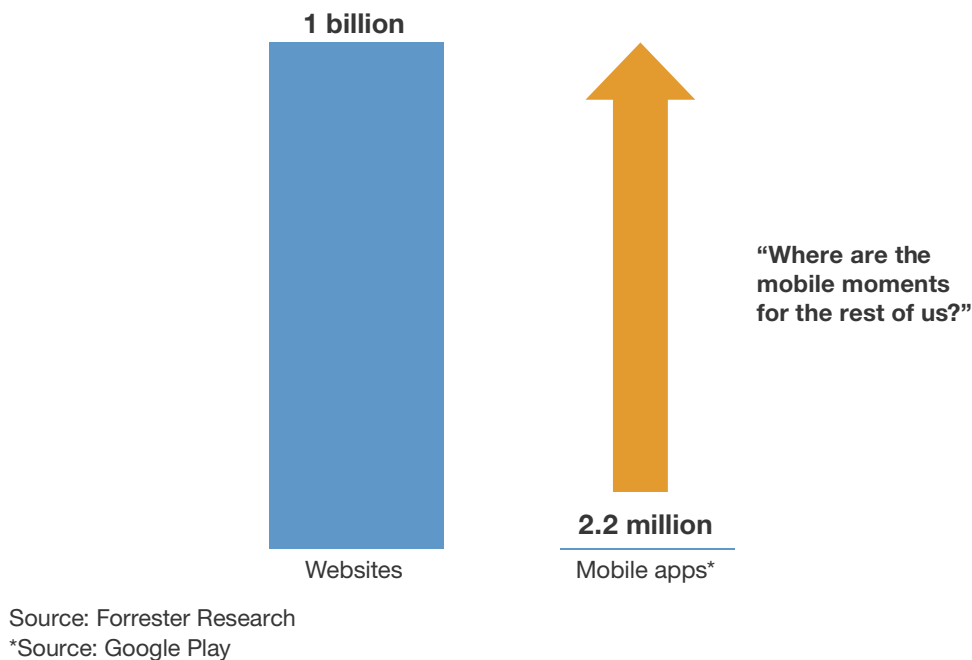
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The Result Is Apps Customers Don't Want — And A Billion Joyless Websites

There was a time when we thought apps were the future for every mobile interaction for every customer. It's now clear that mobile apps are for your best customers — and their expectations for what those apps should do for them are growing.[11] But most companies don't have customers that loyal, and many customers can't be bothered to download your app.

It's time to stop denying that your customers deserve great mobile web moments, too.

It's time to stop denying that your customers deserve great mobile web moments, too (see Figure 4). The evidence is clear. People vote with their clicks. They might hit your website on their phone, but they mostly don't stay there. Instead, they dive into a favorite app like Facebook or Instagram or WeChat or YouTube instead of engaging with your disappointing mobile website.

FIGURE 4 Where Are The Mobile Moments For The Rest Of Us?

1 billion

Websites

2.2 million

Mobile apps*

"Where are the mobile moments for the rest of us?"

Source: Forrester Research
*Source: Google Play

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What It Means

It's Time For A Radical Web Reset

I don't want to live in a world with a billion joyless websites. Do you? You have a choice: Hand your mobile moments over to a bunch of apps you don't own, or do a radical reset of your mobile web strategy, and make your mobile website wildly successful. To find how to reinvent your website for mobile moments, we are interviewing 60 of the best digital businesses on the planet. We will bring you their best practices for building a contextual web: one optimized for each person on each device on each touchpoint on his or her journey. Until then, eBusiness professionals should start laying the strategic anchors to:

› **Prepare for majority-mobile.** As an eBusiness professional, you will have to engineer a mobile mind shift for your entire company. We will say a lot more about this in our next report. But we'll tantalize you with a quote from a fabulous omnichannel retailer: "Our reality is that mobile web is as big as our entire eCommerce business was a few years ago. We are excited about this, but we need to shift internally to support it."

› **Plan to spend twice as much as you do today.** Frankly, we've been horrified at the disparity between the leadership and funding for the web team and for mobile apps in most companies. Talk to any digital pure play: Web and mobile are two vital arrows in the quiver, and each gets the funding and executive attention it needs. That probably means doubling your digital customer experience budget. If your CEO isn't thinking digital customer strategy, you could be a dead company walking.[12]

› **Take pitchforks to Cupertino and must-have browser feature lists to Mountain View.** When Apple launched the iPhone in 2007, it was the world's biggest web promoter. But Apple's service business today is built on apps.[13] In our interviews with major brands, tech vendors, and some brilliant web developers, it's become clear to us that Apple's slow adoption of mobile web technology is holding us all back.

If you have a voice, you should be demanding that Apple join with Google, Microsoft, Opera, and Samsung to reinvent the browser for the mobile web to deliver app-like experiences. The mobile web needs a "Google Maps" moment — when it became clear that the desktop web could be as good as an installed application. A set of technologies called "progressive web apps" promises to make that reality one step closer.[14]

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Supplemental Material

Survey Methodology

Forrester's North American Consumer Technographics® Devices And Telecom Online Benchmark Recontact Survey, 2015, is an online survey fielded in July 2015 of 4,632 US individuals ages 18 to 88. For results based on a randomly chosen sample of this size, there is 95% confidence that the results have a statistical precision of plus or minus 1.4% of what they would be if the entire population of US online adults (defined as those online weekly or more often) had been surveyed. Forrester weighted the data by age, gender, income, broadband adoption, and region to demographically represent the adult US online population. The survey sample size, when weighted, was 4,616. (Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in online panels.) Please note that respondents who participate in online surveys generally have more experience with the internet and feel more comfortable transacting online.

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This survey is part of our North American Online Benchmark Recontact System. Respondents who participated in both of our online benchmark surveys (part 1 and part 2) are invited to also participate in a series of follow-up recontact surveys that cover topics in greater depth and detail. The data from both online benchmark surveys (part 1 and part 2) is appended to each recontact survey's data set so that data cuts can be performed across benchmarks and the recontact itself. Ultimately, this recontact system provides a more holistic view of consumer behavior and allows for more data cutting opportunities than a standalone survey provides.

Endnotes

[1] Source: Forrester Data Mobile, Smartphone, And Tablet Forecast 2016 To 2021 (Global).

[2] For more on the distinction between mobile web and apps, see the "The Great Debate: Mobile Websites Or Apps?" Forrester report.

[3] For more on how to improve marketing tactics, find mobile brand friends or foes, and optimize direct mobile engagement, see the "Master Your Customers' Mobile Pathways" Forrester report.

[4] There are two other contributing reasons why, en masse, people would spend less time on average on websites: 1) Folks are getting exactly what they want in less time. (But does your experience confirm that hypothesis? Ours doesn't.) Or, 2) as audiences grow, later adopters are less enthusiastic users than early adopters, so they spend less time on the mobile web. We'd bet on the second reason, which does not let website builders off the hook.

[5] For more on the distinction between mobile web and apps, see the "The Great Debate: Mobile Websites Or Apps?" Forrester report.

[6] For more on how to improve marketing tactics, find mobile brand friends or foes, and optimize direct mobile engagement, see the "Master Your Customers' Mobile Pathways" Forrester report.

For more on learning how to develop a strategy to borrow, barter for, or buy mobile moments, see the "Your Customers Will Not Download Your App" Forrester report.

[7] For more on how to delight and serve customers in their mobile moments of need, see the "Brief: Mobile-First Demands More Than Basic Responsive Web Design" Forrester report.

[8] For more on why traditional definitions of responsive and adaptive web design are limiting, see the "Brief: Embrace Responsive+ Web Design" Forrester report.

[9] US smartphone owners use 26 apps every month — the same number as last year. For more on how to improve marketing tactics, find mobile brand friends or foes, and optimize direct mobile engagement, see the "Master Your Customers' Mobile Pathways" Forrester report.

[10] For more on the distinction between mobile web and apps, see the "The Great Debate: Mobile Websites Or Apps?" Forrester report.

[11] For more on the future of mobile for eBusiness professionals, see the "The Future Of Mobile: From App Silos To Open Ecosystems" Forrester report.

[12] For more on how to transform your customer experience, see the "Customer Experience Drives Revenue Growth, 2016" Forrester report.

[13] Apple made $19.9 billion on "services" in 2015. Much of that revenue is from apps and content consumed in apps. We believe little or none of it is from websites. So there's a clear financial incentive for Apple to improve apps but little financial incentive to improve the browser. However, Apple has announced that it will support Apple Pay in

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Safari in the fall, so at least that payment service revenue will start to motivate development of a better Safari. And to be fair, an Apple evangelist has tweeted that some key new web technologies, including manifests and service workers, are on the "consideration list" for Safari (and we also hope for WebKit, so other browser makers can run their advanced browsers on iPhones). Source: "Form 10-K," Apple Investor Relations (http://investor.apple.com/secfiling.cfm?filingid=1193125-15-356351&cik=320193).

[14] "Progressive web apps" is a label for a new set of browser technologies that improve mobile web experiences. They are a work in progress — not yet a standard — but Forrester believes these technologies hold promise for enabling developers to build more app-like web experiences. Source: "Progressive Web Apps," Google Developers (https://developers.google.com/web/progressive-web-apps/).

If you have time, spend the hour with co-creator Alex Russell to learn what's behind progressive web apps. Source: "Progressive Web Apps with Alex Russell," YouTube, February 19, 2016 (https://www.youtube.com/watch?v=x7cfLDFVyHo).

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