



quxntcast

MOBILE

MOBILE AND SOCIAL ARE THE

NEW DRIVERS FOR CONTENT DISCOVERY

WHAT PUBLISHERS NEED TO KNOW

INTRODUCTION

For many content publishers, mobile has presented more questions than answers. What is the right mobile strategy, and what role should apps play? While both the App Store and Google Play boast over 1 million apps each, most people use just a few on a daily basis.

Meanwhile, the mobile web has continued to grow, becoming a critical gateway for content. Much of this growth is due to the success of social apps such as Facebook and Twitter. For some publishers, these social apps serve as the single most significant driver of referrals to their mobile content.

In this paper, we'll take a holistic approach to understanding content discovery today. We've divided our findings on this topic into three parts:

PART I THE CONTINUING GROWTH OF MOBILE DEVICES, APPS AND THE MOBILE WEB

PART II CONTENT DISCOVERY ON DESKTOP AND MOBILE

PART III IMPLICATIONS FOR PUBLISHERS

In each section, we'll take a deeper look at how smartphones and tablets have influenced mobile behaviors, how search and social networks are shaping the way users discover mobile content and what you as a publisher can do to increase the discoverability of your mobile content.

PART I

THE GROWTH OF MOBILE DEVICES, APPS AND THE MOBILE WEB

In 2007, the first iPhone was released, leaving an indelible mark on the mobile landscape. Even though other Internet-powered devices had come before it, the iPhone's sleek design and user-friendliness led millions globally to buy their first smartphones. Android entered the smartphone market a year later, and the operating system's open source platform has since resulted in thousands of devices across dozens of carriers. With smartphone shipments predicted to reach over 1 billion in 2014, it is clear that smartphones are quickly becoming ubiquitous.¹

UNDERSTANDING THE FULL STORY BEHIND MOBILE APPS

On our smartphones, apps have revolutionized the way we interact with online content. Some reports estimate that as much as 89 percent of the time that people spend on smartphones is spent in apps.² However, statistics on app usage are sometimes misleading as apps and mobile web can be conflated.

So how does this happen? When people explore content from an app — such as reading articles linked from a Facebook or Twitter post — this browsing activity is often counted as time spent in apps, not on the mobile web.

And the scale of this effect could be quite significant. Up to a quarter of mobile web pageviews today are from in-app browsing.³ And many of these pageviews come from social apps, which currently make up eight of the top 10 apps in the world.⁴

As for other app statistics, it is estimated that only 1,000 apps (or 0.1 percent of apps in either the App Store or Google Play) have over 50,000 users, and as many as 50 percent of people who download an app only use it once.⁵ On an individual level, while people often report having a large number of apps on their phones, 83 percent say they use 10 or fewer apps on a regular basis.⁶



¹Worldwide Smart Connected Device Market Crossed 1 Billion Shipments in 2012, Apple Pulls Near Samsung in Fourth Quarter, According to IDC. IDC.com. IDC, 26 Mar. 2013. Web. 25 Apr. 2014.

²An Era of Growth: The Cross-Platform Report. Nielsen, 5 Mar. 2014. Web. 25 Apr. 2014.

³Quantcast internal data, March 2014 (iOS only).

⁴Fox, Zoe. "The 10 Most Frequently Used Smartphone Apps." www.mashable.com. Mashable, 5 Aug. 2013. Web. 25 Apr. 2014.

⁵"Digital Diary: Are We Suffering From Mobile App Burnout?" www.nytimes.com. New York Times, 15 Feb. 2013. Web. 25 Apr. 2014.

⁶"How Many Apps Are Too Many? 80% of Tablet Apps Are Discovered through App Stores." www.emarketer.com. eMarketer, 22 Sept. 2011. Web. 25 Apr. 2014.

MOBILE WEB GROWING AT A HEALTHY RATE

In the meantime, there has been a large amount of growth in mobile web searching and browsing.

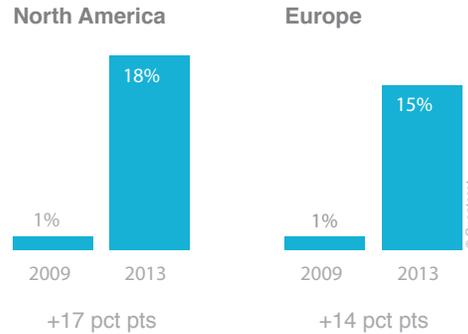
If we look to just a few markets for mobile web growth trends, we see North America's mobile share of online traffic has increased from one percent in 2009 to 18 percent in 2013. During the same period, Europe's mobile share of online traffic jumped from 1 percent to 15 percent.⁷ Overall, mobile traffic accounts for 17 percent of all traffic globally, with some countries experiencing rates far ahead of this trend.⁸

HIGHLIGHTS

Asia leads other continents with 17% mobile web share of traffic.

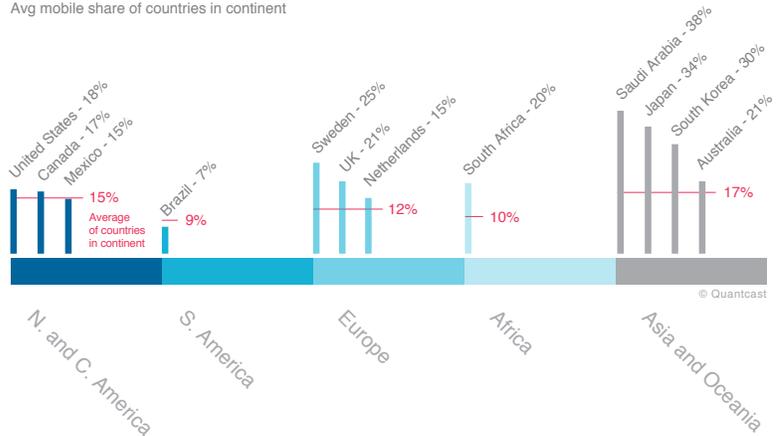
Growth of Mobile Web Share of Traffic

Pageviews of Publishers using Quantcast Measure



Mobile Web Share of Traffic by Continent

Pageviews of Publishers using Quantcast Measure, last 12 months ending January 2014
Avg mobile share of countries in continent



⁷Quantcast internal data, 2009, 2013.
⁸Quantcast internal data, 2013 – 2014.

FAST ADOPTION FOR TABLETS

A few years after the launch of smartphones, came a second major mobile disruption: the launch of the iPad. Today, the tablet market includes five generations of iPads, two generations of iPad minis, countless Android tablets as well as devices from smaller players.

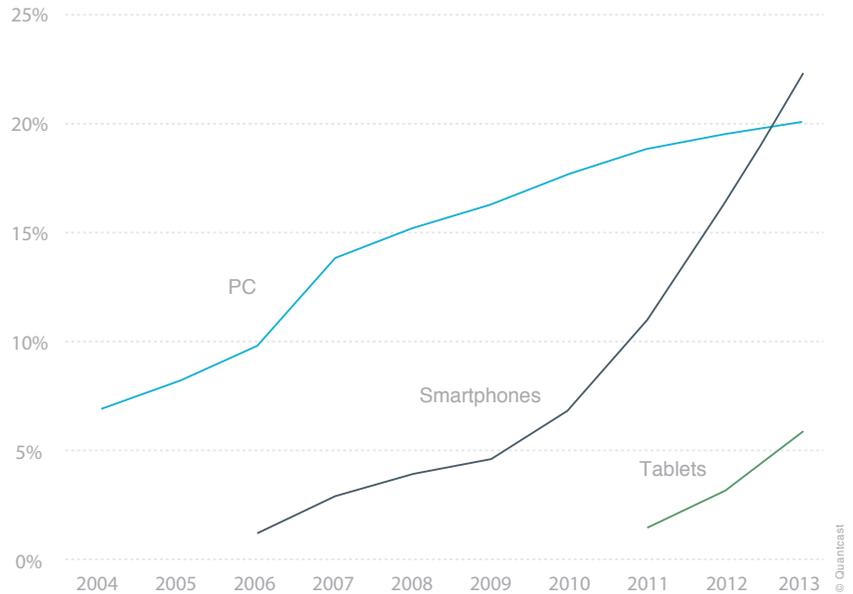
Tablets are showing even faster adoption rates than those of smartphones. It took smartphones four years after introduction to reach six percent penetration, and tablets accomplished that feat after just two years.⁹ By the end of 2014, almost 240 million tablets are projected to be shipped globally.¹⁰

HIGHLIGHTS

Tablet shipments are expected to surpass PC shipments by 2015.¹¹

Global Device Penetration Per Capita

BII estimates, Gartner, IDC, Strategy Analytics, company filings, World Bank 2013



⁹Heggestuen, John. "One In Every 5 People In The World Own A Smartphone, One In Every 17 Own A Tablet." <http://www.businessinsider.com/>. Business Insider, 15 Dec. 2013. Web. 25 Apr. 2014.

¹⁰Worldwide Smart Connected Device Market Crossed 1 Billion Shipments in 2012, Apple Pulls Near Samsung in Fourth Quarter, According to IDC. IDC.com. IDC, 26 Mar. 2013. Web. 25 Apr. 2014.

¹¹IDC Press Release, Sept 11 2013 <http://www.idc.com/getdoc.jsp?containerId=prUS24314413>

SMARTPHONES STILL DOMINATE THE MOBILE WEB

One might think that tablets' larger screens would lend themselves to more mobile web searching and browsing, but this isn't the case — at least not yet. Smartphones still make up the majority (66 percent) of web browsing activity from mobile devices.¹²

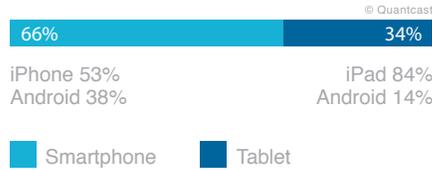
And even if tablet sales continue to rise, this would not be a guarantee of rapid mobile web growth. One reason for this is Android. While Android has captured 40 percent of the market (compared to 51 percent for iPad), the platform only accounts for 14 percent of mobile web pageviews from tablets.¹³ If Google and its hardware partners can increase this percentage, however, it could become a serious boon for mobile web usage.

HIGHLIGHTS

Per device, smartphones generate 53% more pageviews than tablets.

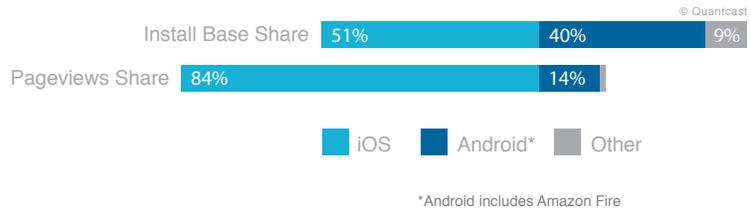
Mobile Traffic by Device

Pageviews of US Publishers using Quantcast Measure, last 12 months ending January 2014



Tablet Usage by Platform

Pageviews of US Publishers using Quantcast Measure, last 12 months ending January 2014.
Installed base from ABI Research; Pew Research



¹²Quantcast internal data, 2013 – 2014.

¹³Quantcast internal data, 2013 – 2014.

PART II

CONTENT DISCOVERY ON DESKTOP AND MOBILE

Now that more consumers have mobile devices within arm's reach, it seems natural that they use these devices to find new content.

While many publishers are now seeing a significant portion of their pageviews coming from mobile devices, top publishers are seeing an even more pronounced effect. Of the top 250 US publishers using Quantcast Measure, 13 percent see more than half of their traffic coming from the mobile web.¹⁴

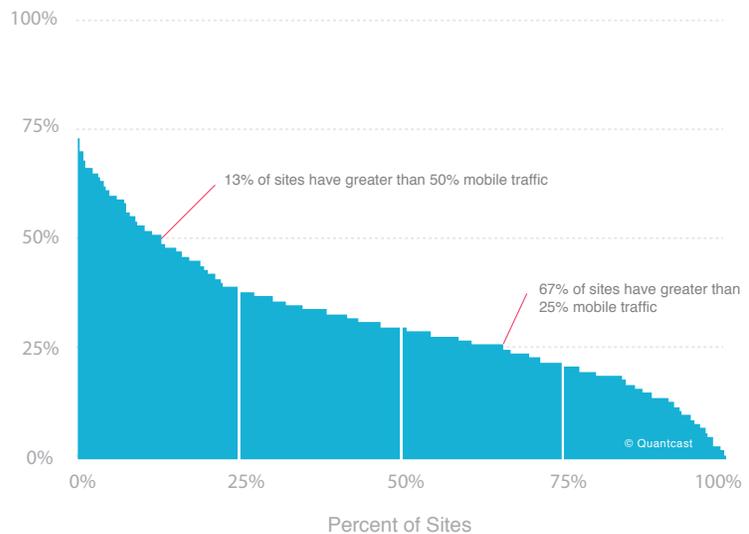
MOBILE GROWTH = SOCIAL GROWTH

Social is also influencing mobile content discovery. Social apps as a category have the highest regular usage rate among US consumers — greater than even maps or games. Research shows that 63 percent of Facebook users, 57 percent of Instagram users and 46 percent of Twitter users use these services daily.¹⁵

And people on these social networks are increasingly mobile with as much as 75 percent of Facebook and Twitter users accessing these networks from their smartphones and tablets.¹⁶ Networks that are entirely mobile-based such as Instagram and Snapchat are also on the rise.

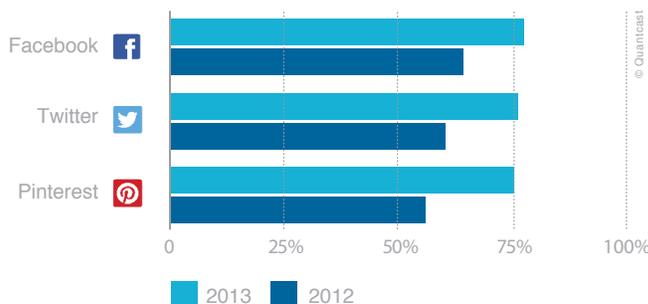
Mobile Web Share of Pageviews by Site

Top 250 US Publishers using Quantcast Measure, last 12 months ending January 2014



Percentage of Social Network Visitors Using Mobile Devices

Reported by Facebook, Twitter and Pinterest



¹⁴Quantcast internal data, 2013 - 2014.

¹⁵Duggan, Maeve, and Aaron Smith. Frequency of Social Media Use. Rep. Pew Research Internet Project, 30 Dec. 2013. Web. 25 Apr. 2014.

¹⁶Quantcast internal data, 2013 - 2014.

SEARCH, SOCIAL AND THE TOP 250 PUBLISHERS

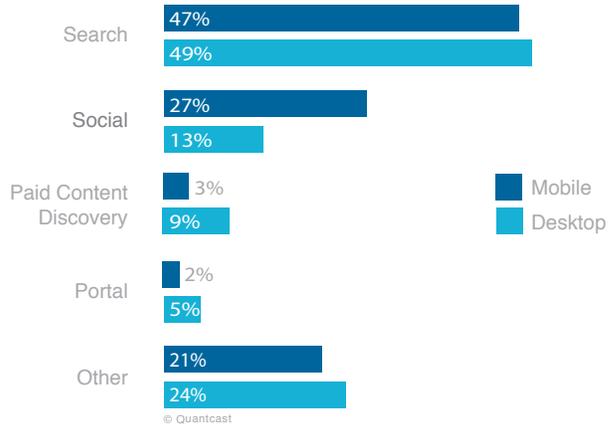
These general content discovery trends are echoed in the statistics for the same set of top 250 US publishers mentioned above. We can see that while search is a top referral source, social plays a comparatively larger role for driving content discovery on the mobile devices versus desktop. We can also note that paid content discovery is much less significant on mobile than on desktop.

HIGHLIGHTS

For content publishers, social media's share of referrals is twice as large on mobile as on desktop. On the other hand, paid content discovery's share of referrals is three times larger on desktop.

Referral Sources for Content Publishers

Top 250 US Publishers using Quantcast Measure, last 12 months ending January 2014



MOBILE CONTENT DISCOVERY METHODS VARY ACCORDING TO VERTICAL

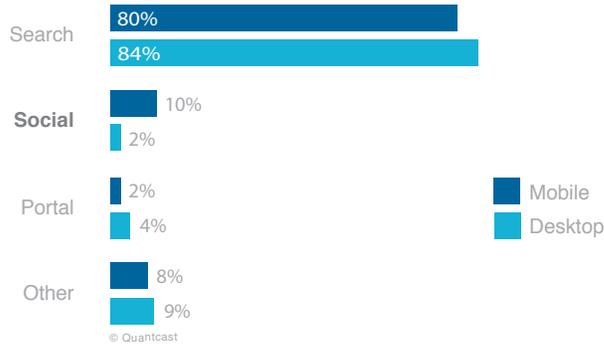
Interestingly, methods for content discovery vary significantly according to vertical. For reference sites such as informational and educational sites, for example, search tends to be a key driver on both desktop and mobile devices. This makes intuitive sense, as people are actively seeking information about a known topic. Except for specific How-To sites, social is not a significant referral source.

HIGHLIGHTS

Which search engine is most mobile in terms of referrals to Reference sites? It's Yahoo, which has a 2:1 ratio of share of mobile referrals to share of desktop referrals.

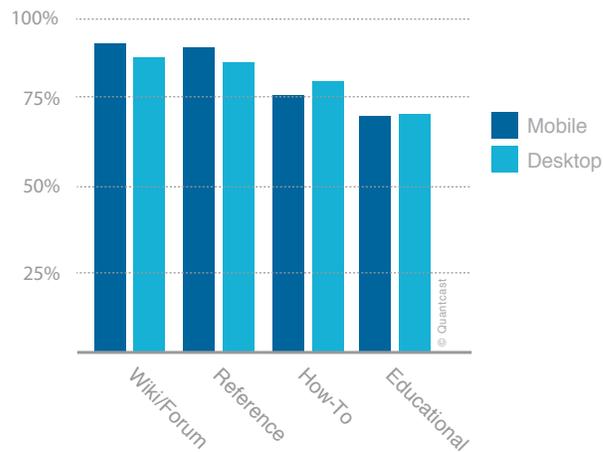
Referral Sources for Reference Sites

Top 250 US Publishers using Quantcast Measure, last 12 months ending January 2014
Paid content discovery not a significant source



Search Referral Share for Reference Sites

Top 250 US Publishers using Quantcast Measure, last 12 months ending Jan 2014



On News and Entertainment sites, we see a completely different trend. For these verticals, social, at 34 percent, is the largest single source of mobile referrals — overtaking even search.

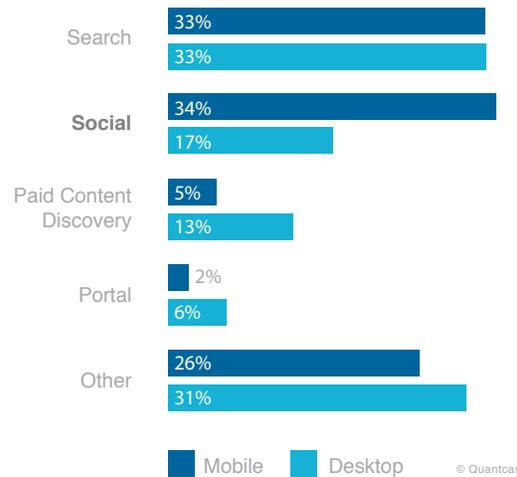
One reason for this is that social networking apps play a large role in aggregating content on mobile. For example, 52 percent of Twitter users and 47 percent of Facebook users use these sites for news consumption.¹⁷ While desktop users also get some of their news content from social sources, they also get much of this content through browsing.

HIGHLIGHTS

Which is the most mobile social network in terms of referrals to News and Entertainment sites? While Facebook has a 2:1 ratio of share of mobile referrals to share of desktop referrals, Twitter's ratio is 5:1.

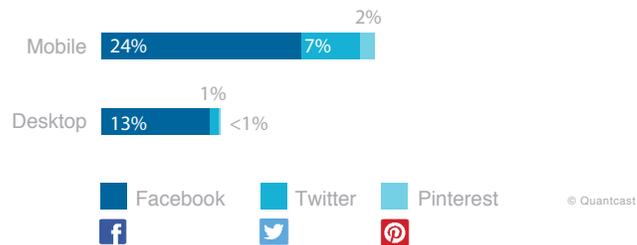
Referral Sources for News and Entertainment Sites

Top 250 US Publishers using Quantcast Measure, last 12 months ending January 2014



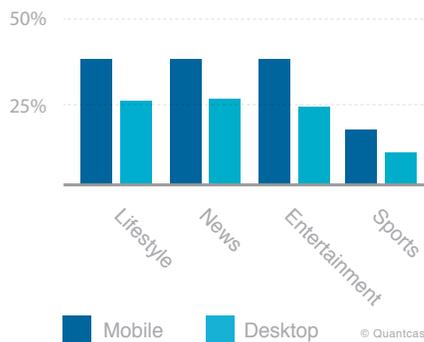
Referral Share by Social Network to News and Entertainment Sites

Top 250 US Publishers using Quantcast Measure, last 12 months ending January 2014



Social Referral Share for News and Entertainment Sites

Top 250 US Publishers using Quantcast Measure, last 12 months ending January 2014



¹⁷Holcomb, Jesse, Jeffrey Gottfried, and Amy Mitchell. News Use Across Social Media Platforms. Rep. Pew Research Internet Project, 14 Nov. 2013. Web. 25 Apr. 2014.

PART III

IMPLICATIONS FOR PUBLISHERS

In Part II, we talked about how social is a growing source of mobile referrals for publishers — particularly for those in the News and Entertainment verticals. While many publishers are already getting a lot of social referrals, not everyone is capitalizing on the full potential of this opportunity.

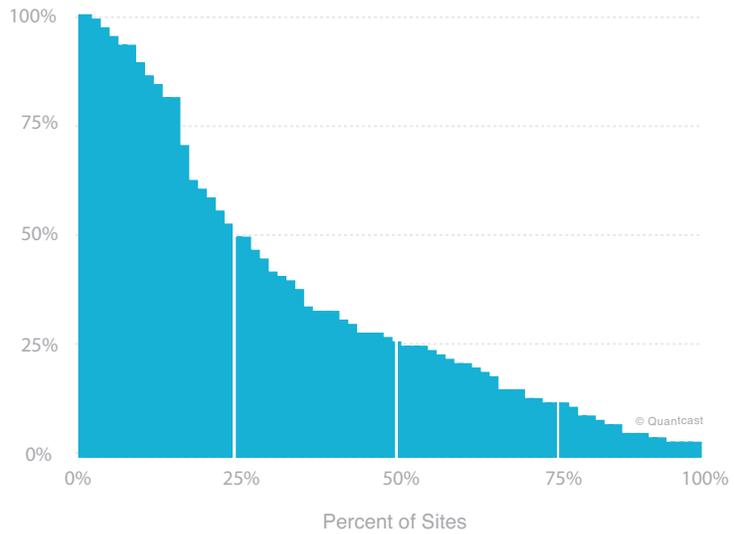
Luckily, there are a number of concrete actions you can take to increase these referrals even further.

HIGHLIGHTS

Even for publishers with similar content, there's a wide range in share of mobile referrals from social. While 26% of News and Entertainment sites have more than half of their mobile referrals from social media, 48% see only a quarter or less of mobile referrals from social.

Share of Mobile Referrals from Social Media for News and Entertainment Sites

Top 250 US publishers using Quantcast Measure, last 12 months ending January 2014



SOCIAL SHAREABILITY FINDINGS FOR NEWS AND ENTERTAINMENT SITES

For News and Entertainment publishers, we found a few key differences between those sites with higher and lower social referrals. While this is just one category, many of these findings can be applied to other verticals.

HIGHLIGHTS

Examples of socially-engaging mobile experiences.

Social Shareability Differences for News and Entertainment Sites

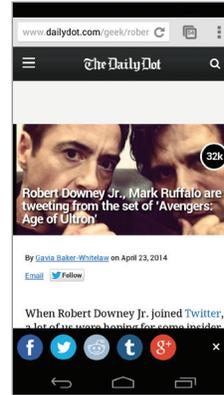
Presentation

High share of social referrals

- Large buttons for sharing and navigation
- Content is streamlined with limited unique elements on the screen

Low share of social referrals

- Site is not mobile optimized
- Site is cluttered with too many elements on the screen



Large buttons



Streamlined content

Headline

High share of social referrals

- Emotionally-engaging — whether funny, mysterious, cute, sparking outrage, or life-affirming

Low share of social referrals

- Intellectual, factual, snarky, or highly-negative



Emotionally-engaging headline

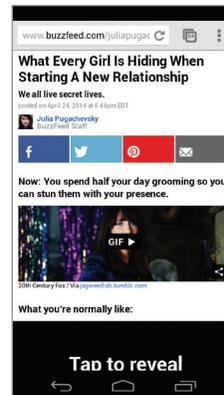
Advertising

High share of social referrals

- Limited to one ad unit

Low share of social referrals

- Multiple ad units
- Full-page takeovers
- Off-site content recommendations



Limited advertising

THREE PLACES TO START

If you want to start attracting more mobile social visitors now, here are three places where you can start.

1. ENSURE THAT YOUR WEBSITE IS MOBILE OPTIMIZED

Out of the top 250 Quantcast Measure publishers, 79 percent of those in the News and Entertainment vertical and 61 percent of those in the Reference vertical have mobile-optimized websites. Having a mobile-optimized website — particularly one that is optimized for smartphones — is correlated with a higher share of mobile pageviews. By offering your users a mobile-optimized site, you can reach customers where they increasingly are: on their mobile devices.

2. MAXIMIZE YOUR MOBILE SOCIAL OPPORTUNITY

While a quarter of Quantcast's top 250 US News and Entertainment publishers receive more than 50 percent of mobile referrals from social media, nearly half have less than 25 percent of their referrals coming from social sources. This means that these publishers — and you — have a large opportunity to increase your mobile referrals and traffic. Evaluate your mobile web experience and make sure you're doing what you can to encourage mobile referrals and traffic. As mentioned above, simple changes such as including large social sharing buttons, minimizing distracting, non-essential content and experimenting with headlines can make a large difference for your business. View our examples above to see how top mobile social publishers are already doing this.

3. MEASURE YOUR MOBILE PROPERTIES

While mobile has historically been a fraction of content publishers' traffic, mobile traffic and referrals are growing all the time — today, 17% of global web traffic is from mobile devices. For the top 250 US Quantcast Measure publishers, 67 percent of them get at least a quarter of their traffic from mobile devices — and that number is growing. As mobile is likely going to be a more significant part of your business as time goes on, ensure you're correctly measuring all your mobile properties to get credit for your total audience reach.

SUMMARY

As mobile devices of all kinds continue to enter the market, we see that people are not only spending more time in apps, but also consuming more mobile web content. We expect this trend to continue as consumers increasingly choose mobile devices over desktop for searching and browsing.

On both desktop and mobile devices, search and social continue to be key drivers of content discovery. However, social plays a much more prominent role on mobile than on desktop for most content categories other than Reference sites.

We've listed a few simple ways to make your content more mobile and social ready. Publishers who prepare now for mobile and social-enabled content discovery will be those that reap the most benefits in our increasingly mobile world. To learn more about how Quantcast can help, contact us at inquiries@quantcast.com.

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