The State of Mobile Benchmark

Adobe Digital Index
Mobile’s on the move

Mobile devices have changed the way consumers interact with businesses. Marketers should understand the trends, strengths, and weaknesses of both tablets and smartphones in order to present the right experience to the different mobile customers.

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In just three years, tablets have overtaken smartphones in the amount of traffic they drive.

The findings:
- Globally, websites are getting more traffic from tablets than smartphones.
- Internet users view 70% more pages per visit when browsing on a tablet vs. a smartphone.

The opportunity:
While tablet and smartphone consumers are both mobile users, they behave very differently. Tablet users actually behave more like PC users in the way they browse and engage.
Consumers all over the world are trying tablets for the first time. Internet users in western countries have adopted tablets rapidly, while their counterparts in Asia prefer to browse via smartphone.

The findings:
- Smartphone traffic is similar between the U.S. and the U.K., but tablet traffic is much higher in the U.K.
- U.K. Internet surfers are more likely to browse through both a tablet and smartphone than their German and French counterparts.
- In Japan and China, smartphones remain the browsing device of choice.

The opportunity:
Consumers use their various mobile devices differently. You need to optimize your site for both the smartphone and tablet experiences.
Consumers’ preferences for tablets versus smartphones vary depending on the type of site they’re visiting. When shopping on retail and e-commerce sites, users prefer tablets. Telecom and media sites tend to be frequented more often by smartphone users.

The findings:
- Retail websites get the most tablet traffic followed by auto and travel & hospitality sites.
- Conversely, consumers prefer their smartphone when visiting both telecom and media & entertainment sites.

The opportunity:
As tablets get smaller and smartphones get bigger you’ll need to rely less on screen size and more on other cues like connection type (Wi-Fi vs. cellular) and referral source to determine the best web experience to offer.
Mobile browsing

Smartphone operating system by country

Android and iOS are becoming more dominant around the world. Other competing platforms account for only a small percentage of the traffic.

The findings:
- Android™ and iOS account for nearly 90% of smartphone browsing in all six of the countries we observed.
- RIM and Symbian® maintain their strongest footholds in the U.K. and China.
- Android share is largest in Japan.
- iOS is the leading operating system in the U.S., U.K., and France.

The opportunity:
As the market consolidates around iOS and Android, focus your mobile experience on these two major players.

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**SHARE OF VISITS BY SMARTPHONE OPERATING SYSTEM**

**FEBRUARY 2013**

- iOS
- ANDROID
- RIM
- SYMBIAN
- OTHER*
Even as sales of Android devices increase, iOS has reemerged as the operating system most often used for browsing in the U.S.

**The findings:**
- Today, iOS accounts for 49% of smartphone browsing in the U.S.
- Android accounts for 45% of smartphone browsing.
- Over the last 12 months, RIM slid from a 5% to a 1% share of visits in the U.S., and Windows® maintained its 1% share.
Mobile browsing
Smartphone manufacturers by country

In five of the six countries we featured, Apple and Samsung devices accounted for the majority of smartphone website traffic. Japan was the only outlier.

The findings:
• From February 2012 to February 2013, the share of online visits from Samsung devices has grown at the expense of other manufacturers who produce Android-based devices.
• No manufacturer besides Samsung and Apple has gained more than a 1% market share in the U.S. in the last year.
• In Japan, its DoCoMo, not Samsung, that accounts for significant percentage of mobile visits, closely rivaling Apple.
Mobile browsing

Tablet operating systems by country

When it comes to browsing on tablets, Apple has a commanding lead in all six of the countries we featured.

The findings:

- iOS dominates tablet browsing with over 77% of the share in the six countries measured, and continues to increase its share of tablet visits.

- In the U.S., iOS grew by nearly 10% year-over-year with the release of the iPad 3 in March 2012, and iPad 4 and Mini in November 2012.
Publishers of digital print content are enjoying steady growth in readership due in part to release of new devices and further adoption of digital magazines.

The findings:

• From August 2012 to February 2013, there was a 200% average growth in readers of digital publishing apps.
Most digital magazine consumers read with tablets. Tablet use leads to more frequent, in-depth, and longer reading sessions compared to smartphones.

The findings:
- Seventy-five percent of reading sessions occur on tablets, and 23% on smartphones. When compared to smartphone readers, tablet readers:
  - Open their app twice as often per month
  - Read three times as many pages each time they read

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Mobile reading
Engagement by device type
Mobile video consumption is on the rise. By Q4 2012, mobile video starts—including both smartphones and tablets—have tripled year over year and currently account for over 10% of total digital video starts.

The findings:
- Video starts on smartphones tripled year over year from 2011 to 2012.
- Tablet video consumption slightly outpaced smartphones in video starts.

The opportunity:
The growing mobile audience provides incremental engagement and revenue opportunities for advertising. Tablet viewers, in particular, are early adopters who typically spend more money, book more trips, and consume more media content. Publishers can capitalize on this target audience with high CPMs and incremental impressions.
Mobile social media

Engagement on mobile devices

Mobile accounts for a growing share of social media engagement. Mobile consumers like the strides Facebook is making to improve the user experience on smartphones and tablets.

The findings:
- One third of all likes on Facebook now occur via a mobile device.
- After a slight dip at the end of 2012, the mobile share of Facebook “likes” jumped 56% between December 2012 and January 2013.

The opportunity:
Mobile and social go hand in hand. Use mobile specific offers on social media channels to reinforce this natural affinity.
Mobile shopping

Conversion by mobile device type

When shopping online, consumers use tablets like a PC to compare products and make the purchase. They use smartphones for quick references like price checks and finding store locations.

The findings:
- Conversion rates on tablets are three times greater than on smartphones.
- Tablet conversion rates still don’t match those of PCs.

The opportunity:
Differences in conversion rates point to the use cases shoppers have in mind when they choose to use a tablet or a smartphone. Retailers should not treat all mobile visits the same.
Glossary

- **Average Reader Growth**: Unique visitors by month divided by August 2012 unique visitors.
- **Download Completion Rate**: Download starts divided by download completes.
- **Consumption**: Time spent divided by month.
- **Conversion Rate**: Orders divided by visits.
- **Engagement (Reading)**: Pages divided by reading session.
- **Frequency (Reading)**: Reading sessions divided by month.
- **Like Share**: Likes divided by total likes.
- **Page Views Share**: Page views divided by total page views.
- **Video Start Share**: Video starts divided by total video starts.
- **Video view rate**: Video starts divided by visits.
- **Visit Share**: Visits divided by total visits.
Methodology

The data for The State of Mobile report was pulled from:

- Mobile browsing statistics were based on analysis of more than 150 billion visits to 1,500+ websites worldwide between January 2012 to February 2013.
- Mobile reading statistics were based on analysis of 223.5 million reading sessions to 100 digital magazine apps between January 2012 to February 2013.
- Mobile viewing statistics were based on analysis of 19.6 billion video starts on 50 media websites in 2012.
- Mobile shopping statistics were based on analysis of 500+ retail websites in December 2012.

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Ask a question or make a suggestion:
digindex@adobe.com
### U.S. Smartphone Share of Visits by Operating System

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<tr>
<th>Month</th>
<th>Apple</th>
<th>Samsung</th>
<th>HTC</th>
<th>Motorola</th>
<th>Nokia</th>
<th>DoCoMo</th>
<th>Sony Ericsson</th>
<th>LG</th>
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<th>T-Mobile</th>
<th>RIM</th>
<th>Sony</th>
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### U.S. Tablet Share of Visits by Operating System

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<th>Samsung</th>
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<th>Acer</th>
<th>RIM</th>
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### U.S. Tablet Share of Visits by Manufacturer

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### Tablet manufacturers share of visits: February 2013

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<th>MS</th>
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### Smartphone manufacturers share of visits: February 2013

<table>
<thead>
<tr>
<th>Country</th>
<th>Apple</th>
<th>Samsung</th>
<th>HTC</th>
<th>Motorola</th>
<th>Nokia</th>
<th>DoCoMo</th>
<th>Sony Ericsson</th>
<th>LG</th>
<th>Huawei</th>
<th>ZTE</th>
<th>T-Mobile</th>
<th>RIM</th>
<th>Sony</th>
<th>Xiaomi</th>
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### Smartphone OS share of visits: February 2013

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<tr>
<th>Country</th>
<th>iOS</th>
<th>Android</th>
<th>Windows</th>
<th>RIM</th>
<th>Linux</th>
<th>Symbian</th>
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<tr>
<td>US</td>
<td>49.5%</td>
<td>45.5%</td>
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</tr>
<tr>
<td>UK</td>
<td>53.5%</td>
<td>37.2%</td>
<td>14.4%</td>
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<td>0.0%</td>
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</tr>
<tr>
<td>Germany</td>
<td>44.9%</td>
<td>46.9%</td>
<td>13.1%</td>
<td>0.4%</td>
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<td>0.0%</td>
<td>0.4%</td>
<td>0.0%</td>
</tr>
<tr>
<td>France</td>
<td>51.0%</td>
<td>41.2%</td>
<td>10.1%</td>
<td>1.5%</td>
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<td>0.3%</td>
<td>1.2%</td>
<td>3.8%</td>
</tr>
<tr>
<td>Japan</td>
<td>36.3%</td>
<td>60.9%</td>
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<tr>
<td>China</td>
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<td>49.6%</td>
<td>0.9%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.3%</td>
<td>12.2%</td>
</tr>
</tbody>
</table>

### Tablet OS share of visits: February 2013

<table>
<thead>
<tr>
<th>Country</th>
<th>iOS</th>
<th>Android</th>
<th>Windows</th>
<th>RIM OS</th>
<th>Linux</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td>77.8%</td>
<td>20.5%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.7%</td>
</tr>
<tr>
<td>UK</td>
<td>84.2%</td>
<td>13.8%</td>
<td>0.0%</td>
<td>14.0%</td>
<td>0.1%</td>
<td>0.4%</td>
</tr>
<tr>
<td>Germany</td>
<td>81.8%</td>
<td>17.5%</td>
<td>0.0%</td>
<td>0.00%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>France</td>
<td>77.6%</td>
<td>22.0%</td>
<td>0.0%</td>
<td>0.2%</td>
<td>0.2%</td>
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<tr>
<td>Japan</td>
<td>77.2%</td>
<td>22.4%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
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</tr>
<tr>
<td>China</td>
<td>81.6%</td>
<td>17.3%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.5%</td>
</tr>
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</table>