

June 2014

BrightEdge Mobile Share Report

The mobile opportunity: How to capture upwards of 200% in lost traffic



BRIGHTEDGE

You've likely heard that mobile website optimization is the next frontier, and you've probably heard that for quite some time. The truth is, we're already there. Mobile usage continues to climb, and BrightEdge data forecasts an estimated 50-percent growth in smartphone traffic in the coming year.

There is a shift happening in the search results as we speak. Sixty-two percent of the results on Google show different results on mobile devices compared to desktop. This is a new trend, and historically has not been the case.

With Google favoring sites in the search results that offer an excellent experience for mobile users, it's now more important than ever for a site's rankings that the mobile solution is implemented well. However, new BrightEdge research has revealed that nearly a third of websites studied have incorrectly implemented mobile solutions, leading to a severe loss of traffic opportunity.

That means, many brands are not only losing traffic to their competitors, but also potential revenue.

In this new research, BrightEdge found that on average, 27 percent of websites were misconfigured for smartphone searches, which resulted in an average 68-percent loss of smartphone traffic to those websites. If these mobile sites were to regain the full potential of their traffic, it would equal a 212-percent jump from what they currently experience.

■ ■ 27% of mobile sites are misconfigured, losing an average of 68% of smartphone traffic.

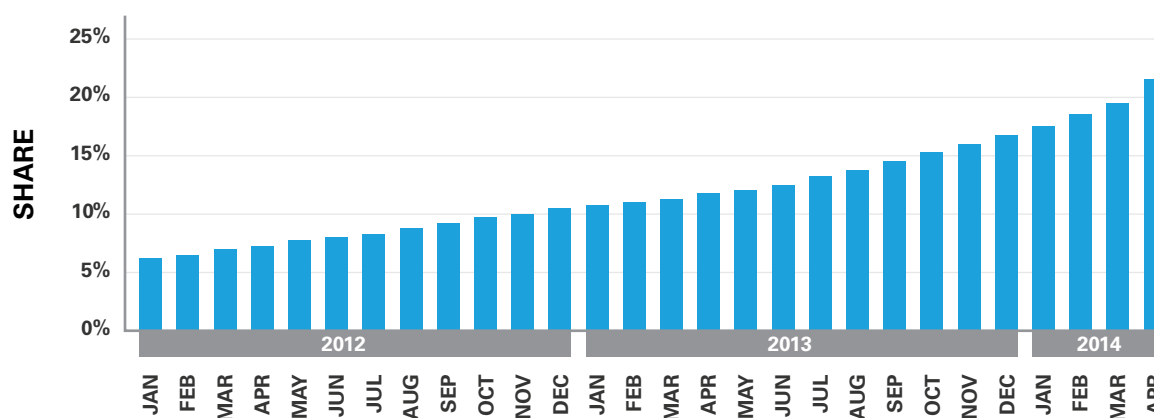
This research, derived from analysis of data found in BrightEdge's Data Cube, serves as a stark reminder that if website owners aren't doing mobile – and doing it well – their traffic suffers. Armed with the right knowledge, website owners can be better prepared for the opportunities that lie ahead in their mobile journey.

This paper will explore exclusive BrightEdge research on how the various approaches to mobile perform relative to one another, and common implementation errors and associated loss of traffic; it will also examine the types of mobile configurations available, the ways to determine which configuration to adopt for smartphone users, and the associated benefits and challenges of each type of configuration.

Smartphone traffic share expected to grow by 50% in coming year

iPhone and Android devices, now in their 7th year of existence, have 23 percent of the organic traffic share, according to information from BrightEdge’s Data Cube in April 2014. Smartphone growth is not expected to stop. BrightEdge forecasts total smartphone traffic share will grow at least 50 percent in 2014.

SMARTPHONE SHARE OF ORGANIC SEARCHES



[eMarketer data agrees](#) with the growth, showing 48.9 percent of mobile phone users worldwide, or 2.23 billion people, “will go online via mobile at least monthly in 2014, and over half of the mobile audience will use the mobile Internet next year.”

Tablets now make up a 12-percent share of organic traffic. Add smartphones and tablets together, and mobile devices now command a third of organic search traffic going to websites.

Smartphones and tablets together command 1/3 of organic search traffic.

Type of mobile configuration and related rankings

On average, 62 percent of organic searches show different results depending on whether the search was performed on a desktop or smartphone, according to BrightEdge data.

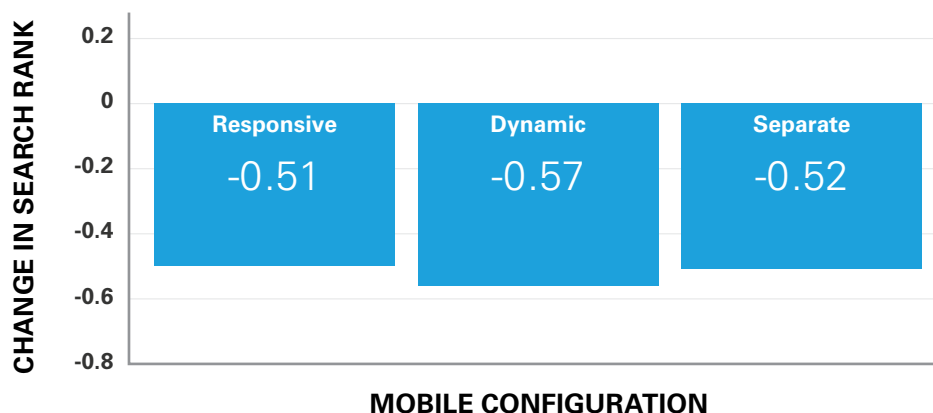
In its research, BrightEdge wanted to know if the *type* of mobile configuration had an impact in mobile rankings, or if it was the *implementation* of the mobile configuration that had more of an impact.

Right now, Google supports the following [three mobile configurations](#):

- **Responsive web design.** This is when a website serves the same URL and same HTML to all devices, using CSS to change how the page is rendered on the device. Google has stated this is its recommended mobile configuration.
- **Dynamic serving.** This is when websites serve the same set of URLs to all devices, but the HTML and CSS changes depending on the device (in other words, the content is different, URL is the same).
- **Separate mobile sites.** This is when a website has a separate mobile experience from its desktop version, and the URLs are different – be it an entire site or specific pages within a site.

Data from BrightEdge’s Data Cube shows that for a given keyword, on average, a website’s rank for smartphone users varies only slightly based on the type of mobile configuration a website has implemented.

So, for example, if a site is ranked No. 3 on a desktop, it would rank 3.5 (on average) on a smartphone device. This data represents the average across billions of keywords studied.



Overall, mobile ranks were half a position lower than desktop ranks across all three mobile approaches; competition from local results is most likely the cause for the slightly lower mobile ranks. For example, if you're on the go and search for pizza, you might get local results that push the rank down, whereas you might not see those same results on a desktop.

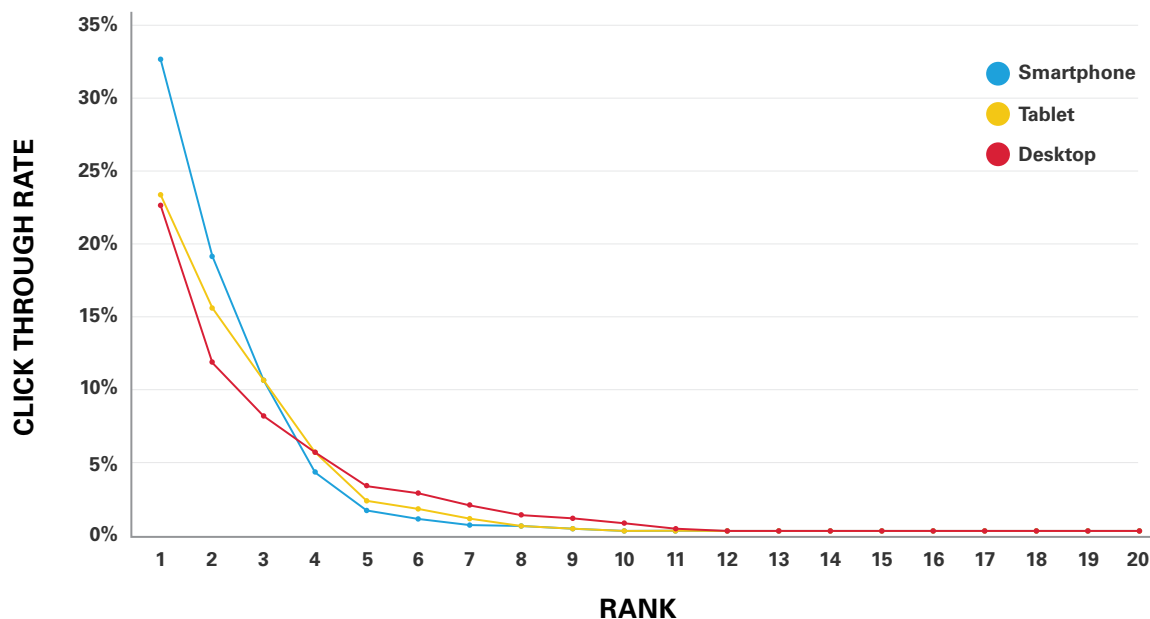
Responsive design did perform slightly better than the other approaches, with the lowest drop in rank at .51 positions, although the difference was not statistically significant.

The relatively similar performance in the search results rankings across all three mobile configurations makes sense, because search engines have stated they are not partial to one approach or the other.

Mobile sites are rarely configured perfectly

While the ranking outcome of a correctly implemented mobile configuration is virtually the same regardless of the type (e.g., responsive, dynamic, separate URLs), an incorrectly implemented site resulted in a drop in smartphone rank by almost two positions (1.82 on average).

This drop in the search rankings may not seem like much, but click-through rates are highly sensitive to rank. Thus, this drop in rank leads to a 68-percent drop in traffic.



This stat is derived from the fact that misconfigured sites receive only 7 percent on average of smartphone traffic, versus sites that have correctly implemented a mobile configuration and see 23 percent of traffic coming from smartphones.

Due to the varying technical requirements of each type of configuration, the configuration a website owner chooses can greatly increase the related risks of errors and ongoing maintenance costs.

In its research, BrightEdge observed the following error rates for each type of mobile configuration:

Approach	% with errors
Separate	72%
Dynamic	30%
Responsive	Negligible

Separate mobile URLs experienced the most implementation errors. Those errors are detailed in the following table:

Error	Dynamic	Separate
No HTTP Vary	82%	41%
Wrong Canonical		35%
No Canonical		35%
Wrong Alternate		2%
No Alternate		61%
Disallow Robots on Mobile subdomain robots.txt		16%
Redirecting all pages to mobile home page		12%

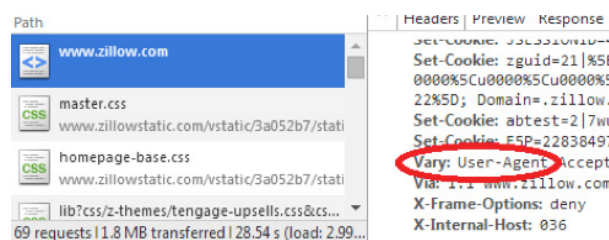
Common mobile errors explained

For separate mobile URLs, there are a handful of common mistakes made in implementation. BrightEdge research showed that no HTTP Vary header was a common mistake amongst two approaches: dynamic serving (82 percent) and separate mobile URLs (41 percent). And among the separate mobile URL approaches, not having an alternate URL tag was the most common error 61 percent of the time.

No HTTP vary

No HTTP Vary means that the website did not indicate through the HTTP Vary header that the content should be different for each “user-agent” (for example, a smartphone user).

An example of the correct usage is pictured in the following image:



Wrong or no canonical

A wrong or no canonical tag means that the website did not have the correct canonical URL listed in the HTML of the smartphone-optimized URL. When a separate mobile experience exists apart from desktop, the separate URLs are the mobile equivalent of the desktop URLs, and annotations need to be made for the search engines to understand that through the canonical tag. A correct canonical has the full subdomain and domain in the URL.

An example of a correct canonical tag is provided in the following screenshot, which shows <http://www.1800flowers.com/valentinesday>:

```
<title>Valentine's Day Flowers & Gifts | 1-800-FLOWERS.COM-10183</title>
<meta name="description" content="Valentine's Day flowers and gifts express how much you care! Send fresh flowers, tr
<meta name="keywords" content="valentines day, valentine, Valentine's day gifts, valentines day flowers, Valentine's day
<link rel="canonical" href="http://www.1800flowers.com/valentinesday" />
<link rel="alternate" media="only screen and(max-width:640px)" href="http://m.www.1800flowers.com/valentinesday" />
```

Wrong or no alternate

Similarly, wrong or no alternate tag means that the website did not have the correct alternate URL in the HTML of the canonical URL.

An example of a correctly implemented alternate URL is shown in the previous screenshot, showing <http://m.www.1800flowers.com/valentinesday>.

Disallow robots

When a webmaster incorrectly uses the “Disallow” directive for robots.txt on a mobile subdomain, it usually looks something like this:

```
User-agent: *  
Disallow: /
```

Using the disallow directive prevents search engines from crawling the separate, mobile-optimized URLs entirely.

Faulty redirects

When a website redirects smartphone users to a mobile home page instead of the mobile version of the URL the person is trying to access, it creates a bad user experience. In addition, a single mobile home page cannot rank well for all the queries related to multiple pages of desktop content – especially if the mobile home page does not contain any of that content.

Pick your mobile solution well

Now that we’ve gone through the common mistakes associated with the various types of mobile configurations, it’s time to start deciding which mobile experience is right for you. Choosing a mobile path starts with the intent of the user and the goals of the site.

Here are two common scenarios for smartphone users interacting with a site that can help determine the mobile configuration to choose:

- 1. Smartphone users have the same intent as desktop users.** The experience should be optimized for the different screen sizes (responsive).
- 2. Smartphone users have different intentions than desktop users.** The website should be configured for those different use cases (separate mobile URLs or dynamic serving).

How do you know which scenario fits your smartphone user? Site owners can use a variety of methods to uncover intent including keyword data by device (if available) and the pages smartphone users visit most, as well as surveying customers to ask them directly what they would want in a mobile experience.

Part of this decision-making process lies within the intel that a marketing team or site owner already has about what people want in a mobile experience. One scenario where a person could make assumptions about mobile intent is if, for example, a nationwide retailer sold clothing online and also in local brick-and-mortar stores.

Those coming from a desktop are likely looking to perform research and to buy clothes online; whereas those coming from smartphones are likely looking for the location and contact information of a local store.

The following graph represents the types of website configurations based on varying needs like:

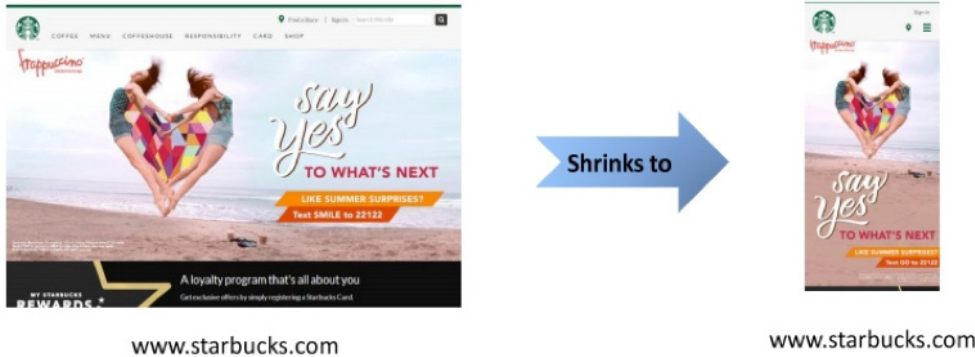
- Same HTML/Same URL
- Different HTML/Same URL
- Different HTML/Different URL

Advanced Mobile SEO Matrix	Same URL	Different URL
Same HTML	Responsive	
Different HTML	Dynamic Serving	Separate

Responsive

Responsive websites are created with the assumption that content should be the same across all devices. It is not the content (or HTML) of the Web page that changes, but the presentation of that content that changes based on the device and size of the browser.

Here is an example using the Starbucks website demonstrating desktop to mobile experience:



This is implemented through the media attribute of the HTML link element and/or media queries in CSS. The URL of the content is also the same regardless of the attributes of the browser or device.

For the last several years, responsive Web design has emerged as a popular choice. That movement was validated in April 2012 when Google officially recommended responsive design as the mobile configuration of choice.

Dynamic

Dynamic websites are created with the assumption that the content (HTML) presented to the user should vary by device. The URL remains the same.

Here is an example using the Zillow website demonstrating the desktop versus dynamic experience:



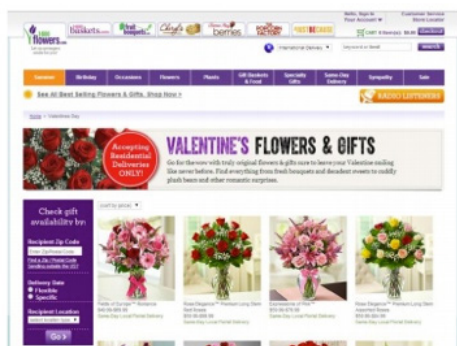
A word of warning: Because the URL of the content is the same regardless of browser or device, the customization of the HTML could be reminiscent of Black Hat “[cloaking](#)” when not implemented well.

The difference between cloaking and dynamic serving is that dynamic serving actively signals that the content is customized through the use of the HTTP Vary header.

Separate

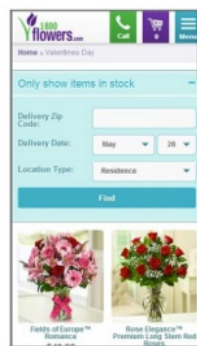
Separate mobile URLs or websites are created as if the desktop and mobile websites are two completely separate entities and experiences. The URLs are different and the content and HTML are different.

Here is an example using 1-800-FLOWERS.COM to show the desktop versus separate mobile experience:



www.1800flowers.com/valentinesday

≠



m.www.1800flowers.com/valentinesday

Tips for implementing mobile

Once you’ve chosen your configuration strategy, and you understand the common errors associated with each type, it’s time to implement. Even if your mobile solution is correctly configured today, with each website release, the configuration needs to be verified again.

Here are some tips on how to get the most from each type of mobile configuration:

- **Responsive:** Make sure to implement conditional loading correctly for fast page load time. Reduce the number of asset files to download, and reduce the file size of large images or video asset files.
- **Dynamic:** Ensure the site is not perceived to be cloaking; indicate “user-agent” in the HTTP Vary header. Also, remember to optimize your mobile URLs and content for on-page SEO, just as you did for desktop content.
- **Separate URLs:** Ensure the site is compliant with HTTP Vary usage, so that search engines know why smartphone users are being redirected to a different URL. Make sure search engines also know how to combine link equity by using canonical and alternate tags and URLs in the HTML. Also, make sure search engines are able to crawl the mobile pages by properly configuring the robots.txt.

What’s next for mobile optimization?

As enterprises cater to the growing mobile market, BrightEdge data shows that all three approaches to mobile website configuration rank about the same for a given keyword if implemented correctly. We believe many brands will take on responsive design as their choice of mobile configuration, but what we’ve found in talking with customers is that one mobile configuration is not necessarily a one-size-fits-all solution.

There is an evolution in how brands are approaching mobile right now. One type of mobile configuration is not always a one-size-fits-all solution.

Jim Yu, Founder and CEO, BrightEdge

Some brands aren't exclusively choosing responsive or dynamic, for example. Some brands will experiment with responsive, but implement dynamic serving of content on the most important pages within the website.

If you're a CMO or site owner, you have some big choices to make in mobile. The mobile configuration itself varies in the degree of risk in potential errors. Layer on top of that multiple mobile approaches, and you have some serious technical considerations.

Being that incorrect implementation results in an average loss of about two-thirds of smartphone traffic, according to BrightEdge data, ensuring mobile configuration is implemented well requires the right tools during the process.

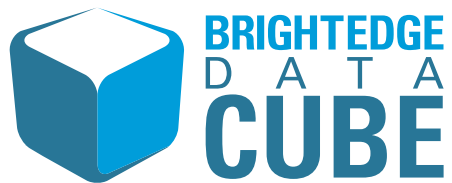
BrightEdge's SEO platform offers the most comprehensive mobile SEO technology on the market to help marketing and development teams succeed before, during and after the mobile implementation.

BrightEdge's site audit recommendations assist during implementation to make sure you get it right, and then mobile analytics and rankings reports track the impact of your mobile investment over time; the mobile "share of voice" takes it a step further to help you understand and monitor the competition after you've launched your mobile experience, so you can tweak your marketing strategy in real time.

“ For Marriott, we definitely need to make sure that we're on top of our game from a mobile perspective — BrightEdge visibility definitely helps us do that.”

Luisa Escobar, Director of Search Engine Optimization, Marriott International

To learn more about tracking mobile search performance, and mobile content and optimization, join us at [Share14](#), BrightEdge's premier digital marketing conference, taking place August 20 to 22, 2014, in San Francisco. More than 1,000 digital marketing leaders are attending to discuss the latest trends in not only mobile, but also content marketing and organic search.



Methodology and notes

Unless otherwise indicated, all BrightEdge data comes from the analysis of information found in BrightEdge's [Data Cube](#) -- the industry's most complete data set, which process more than 100 terabytes of data per week, and includes billions of pieces of content and keywords for analysis.

In all instances where applicable, "mobile" rank and traffic refers to both smartphone and tablet devices combined, whereas references to "smartphone" rank and traffic refer to that device only.

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BrightEdge is the essential SEO and content marketing platform that transforms online content into tangible business results such as traffic, revenue and engagement. BrightEdge's S3 platform is powered by a sophisticated big data analysis engine and is the only company capable of Web-wide, real-time measurement of content engagement across all digital channels, including search, social and mobile. BrightEdge 8,500+ customers include global brands such as 3M, Microsoft, Netflix and Nike.

The company is based in San Mateo, Calif., with offices in New York City, Chicago and London.

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