



Internet
Advertising
Bureau
UK

KANTAR MEDIA

IAB European Mobile Optimised site study UK, France, Germany, Italy and Spain

February 2014



Background

1. Study was first conducted in August 2012 (UK Only)
2. The first study of 2014 was conducted in partnership with Kantar Media, includes five countries, **UK, France, Germany, Italy and Spain**
3. This study looks at the growth from August 2013 – February 2014
4. Methodology
 - Checked manually on mobile phone
 - » Homepage Optimisation
 - Checked on desktop
 - » Responsive Design



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Mobile Optimisation

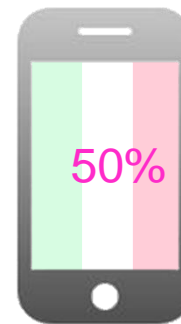
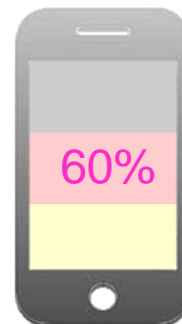
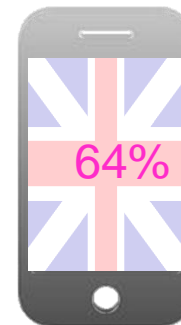
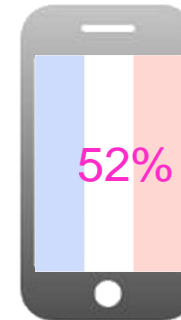
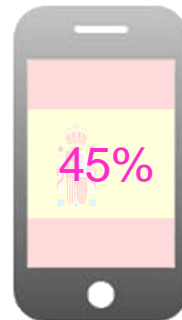


Optimised Design: Topline Findings

- In the UK, there is a **clear awareness of a need to optimise among Top 100 advertisers**; more of this year's Top 100 had an optimised site
- **The UK also demonstrated an average** score of 64% for optimisation across the nations tested
- The automotive industry scored highest as a pan-European average for optimisation (85%); FMCG sites performed lowest (37%). This could be attributable to the fact that **automotive sites are far more consumer facing**, whereas FMCG sites such as **less likely to be visited**.



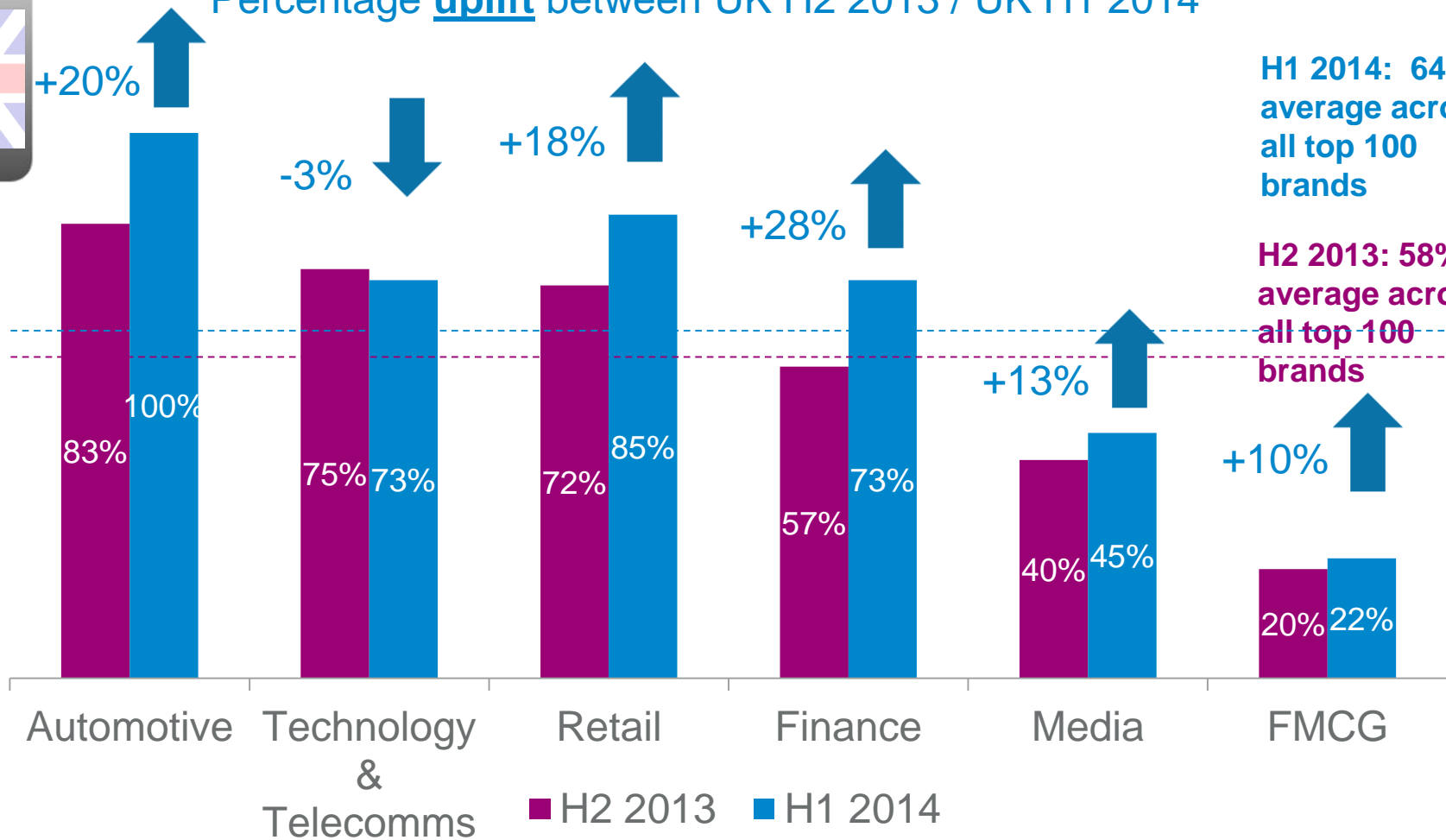
Homepage - % Mobile Optimised





Summary % Homepage Optimised by Sector in 2014 - UK

Percentage uplift between UK H2 2013 / UK H1 2014



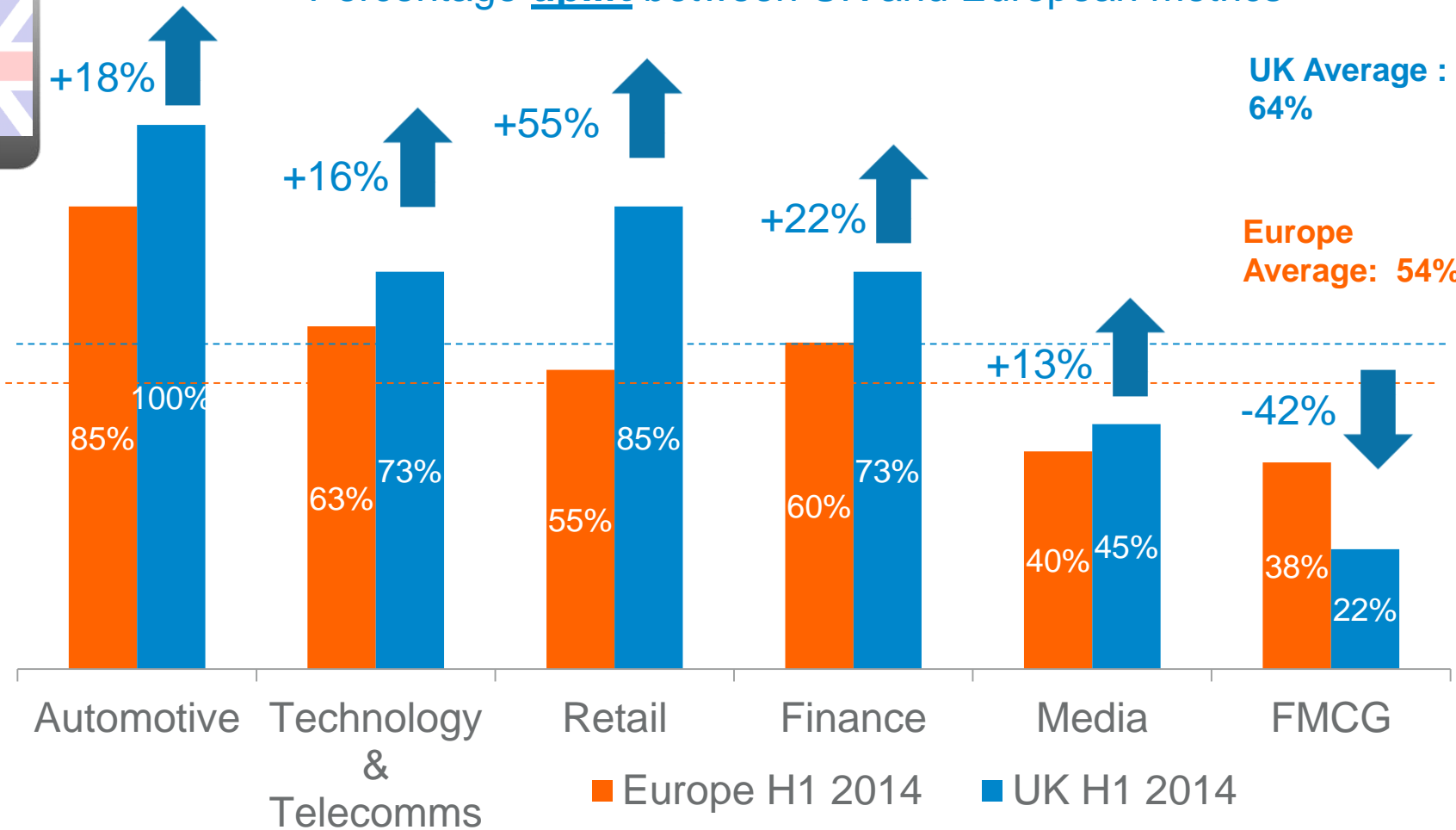


Comparison by sector UK Vs. EU

Percentage uplift between UK and European metrics

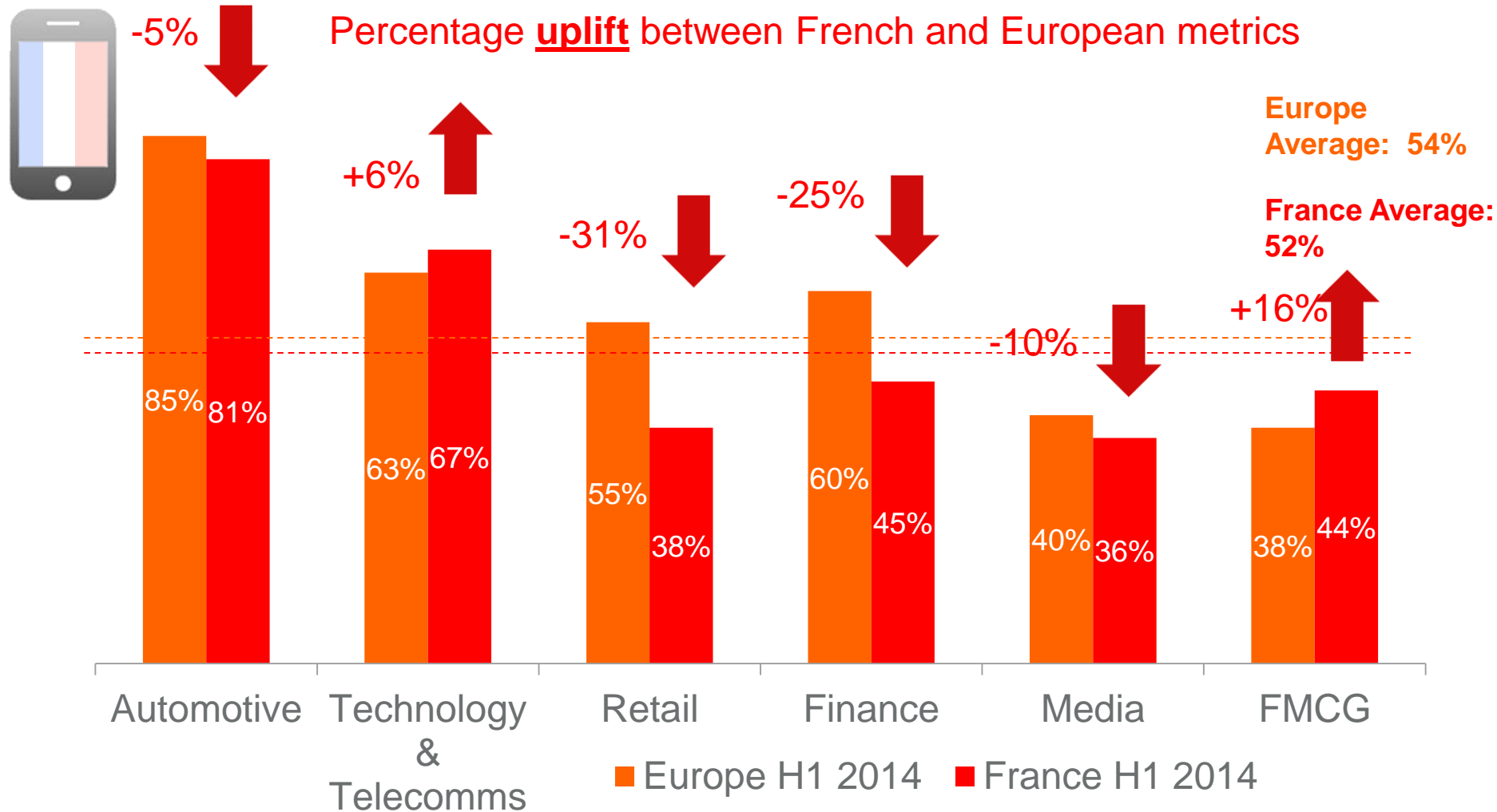
UK Average : 64%

Europe Average: 54%



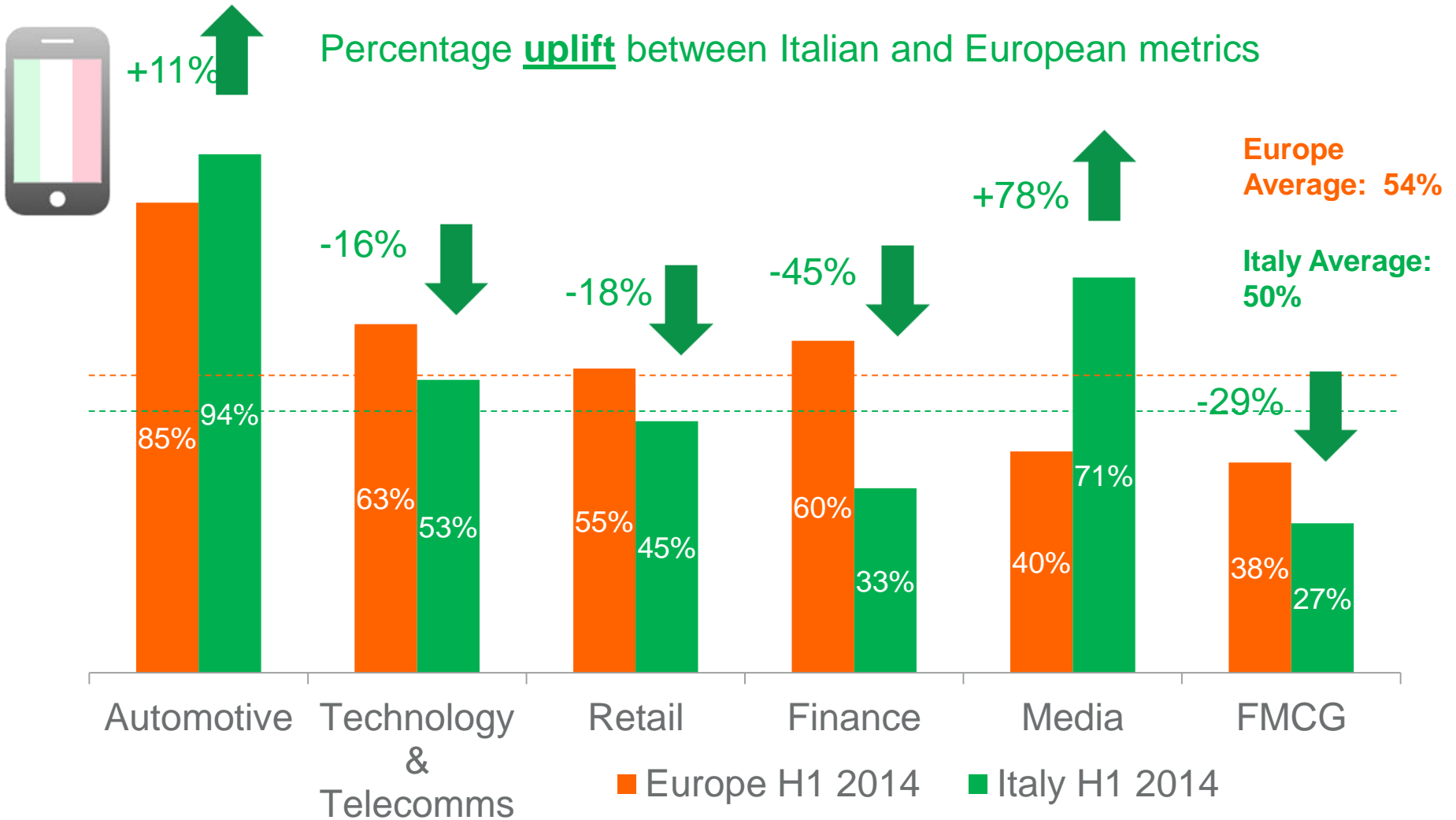


Summary % Homepage Optimised by Sector in 2014 – France





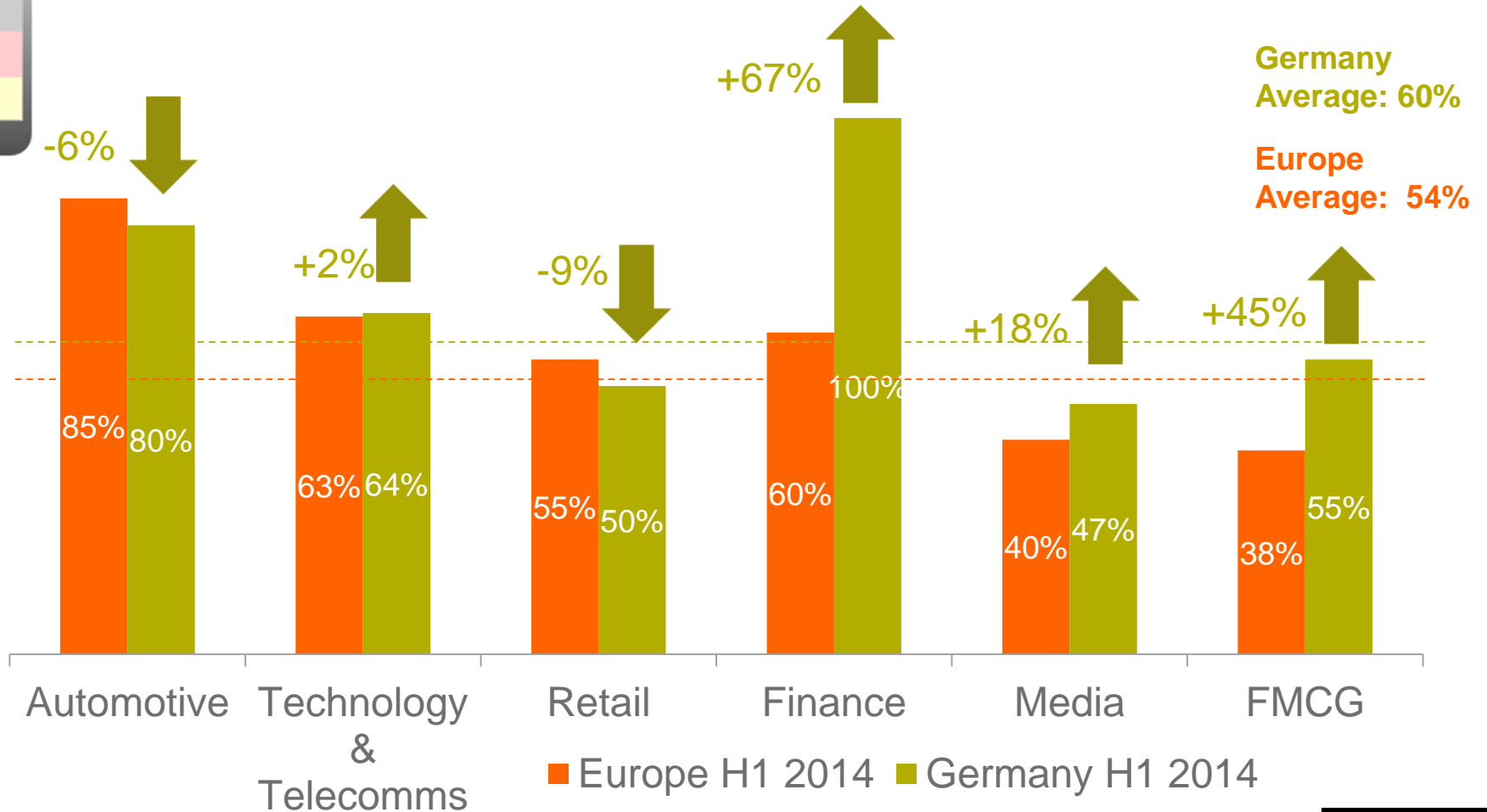
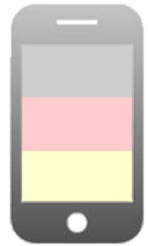
Summary % Homepage Optimised by Sector in 2014 – Italy





Summary % Homepage Optimised by Sector in 2014 – Germany

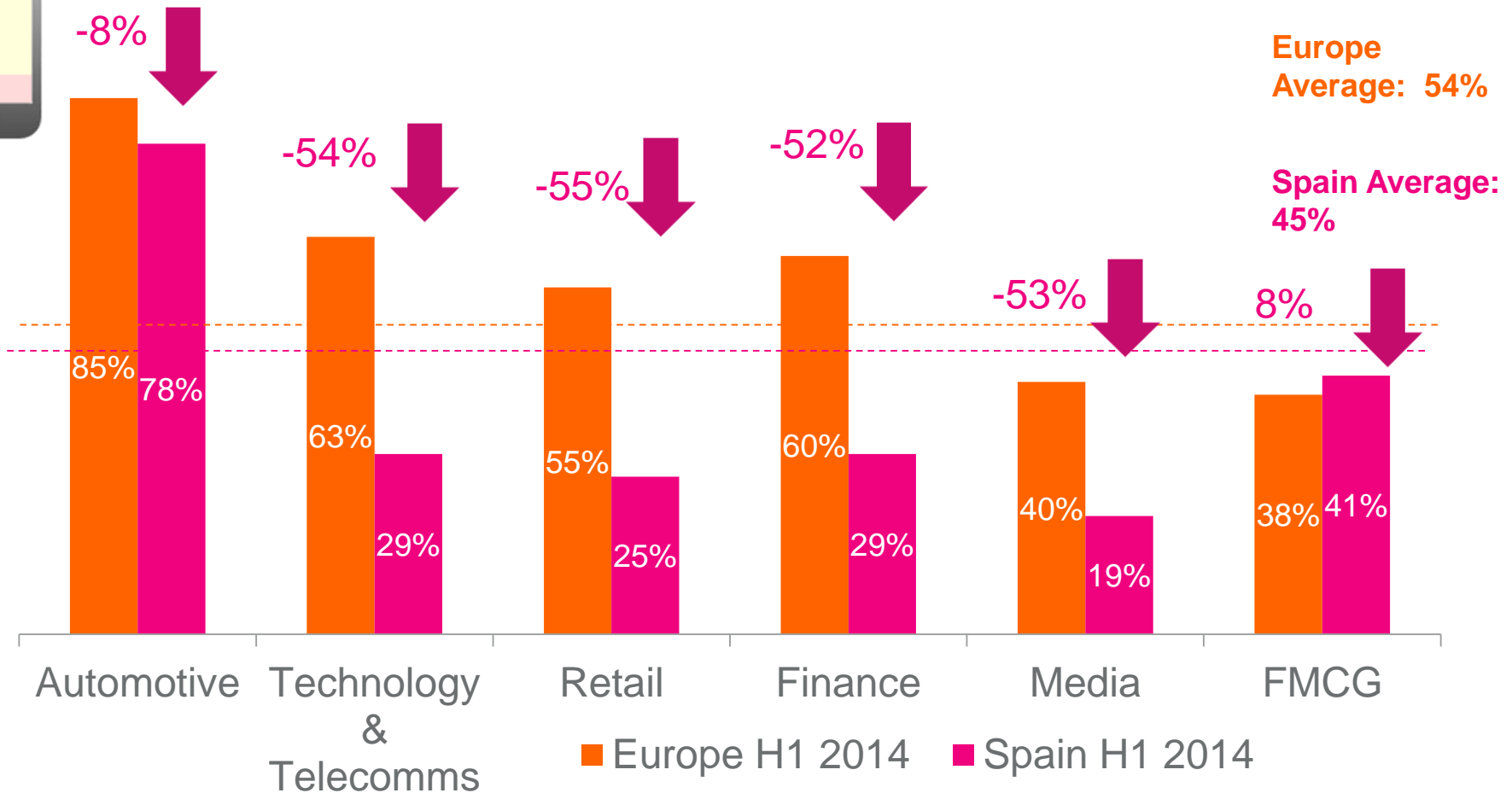
Percentage uplift between German and European metrics





Summary % Homepage Optimised by Sector in 2014 – Spain

Percentage uplift between Spanish and European metrics





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Responsive Web Design



Responsive Design

- Methodology;
 - Dragged corner of desktop website to see if the site content responds dynamically to resizing browser window
 - Used Google Chrome
- Why?
 - To understand advertiser uptake of responsive website design

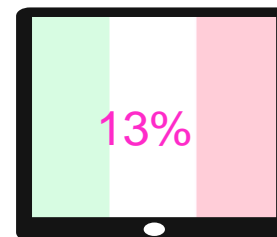
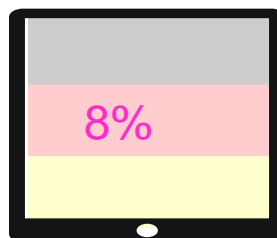
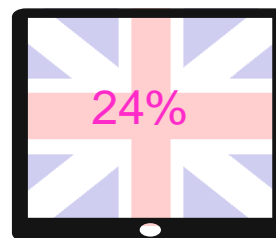
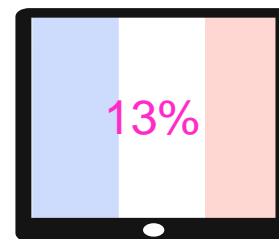
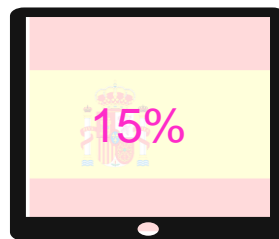
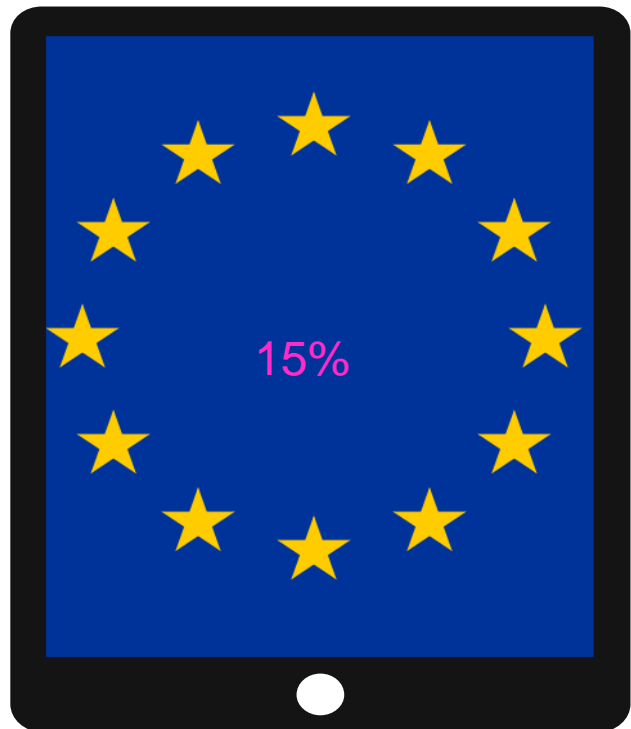


Responsive Design: Topline Findings

- **The UK** demonstrated an average of 24%, and was the only nation to perform **above** the European average
- This was a result of an **increase** in UK Top 100 brands with responsive design, in comparison to 2013 (11%)

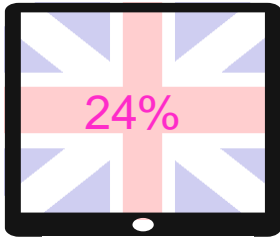


% Optimised Using Responsive Design





Brands that have Responsive Design - UK



churchill™



MORRISONS



KIA MOTORS

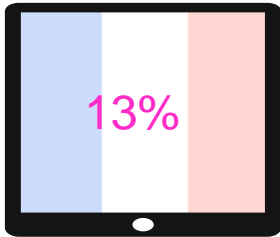


PEUGEOT



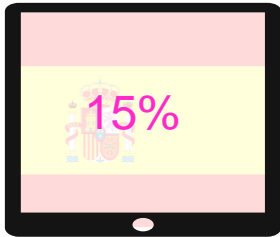


Brands that have Responsive Design - France





Brands that have Responsive Design - Spain



PEUGEOT

CHEVROLET

ING



Generalitat de Catalunya

HONDA
The Power of Dreams



SONY

Christian Dior
PARFUMS

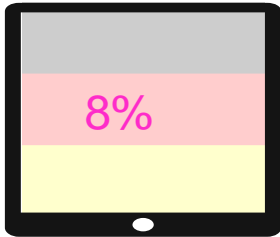


vodafone

NOKIA



Brands that have Responsive Design - Germany



Microsoft

Coca-Cola



SEVENSENSES
THE CULTURE OF HAIR & BEAUTY

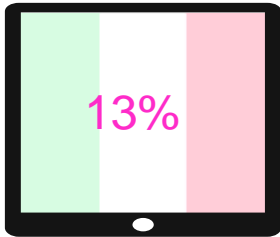


real

REWE



Brands that have Responsive Design - Italy



Microsoft



CoGeDi
International SpA



CALZEDONIA

CHEVROLET

ING



CHANEL



McArthur
Glen
Designer Outlets
TM

SCAVOLINI

Chateau d'Aix

TELECOM
ITALIA





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Page Speed



Speed Test

- Methodology;
 - Tested desktop and mobile homepage using Google's PageSpeed Insights tool (<https://developers.google.com/speed/pagespeed/insights/>)
- Why?
 - To measure the quality of the consumer experience based on page loading time.

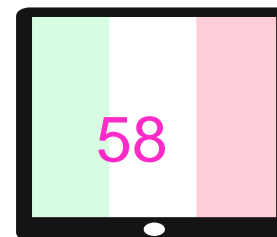
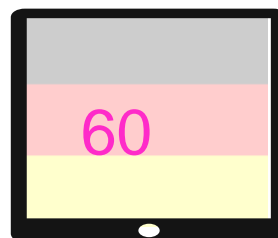
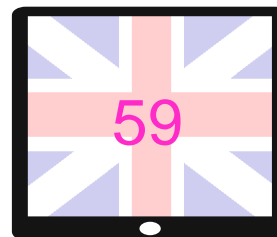
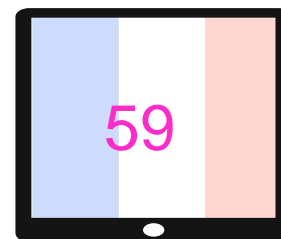
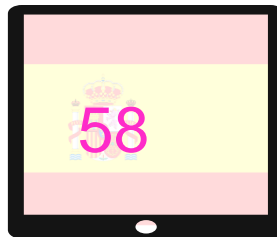


Pagespeed: Topline Findings

- There was **little variance** in average PageSpeed scores between nations at a topline level, with no country deviating more than 1 point from the pan-European average
- The UK metric remains stable
- Across sectors, Technology & Telecomms had the highest average desktop speed (71), and automotive had the highest average mobile speed (62)

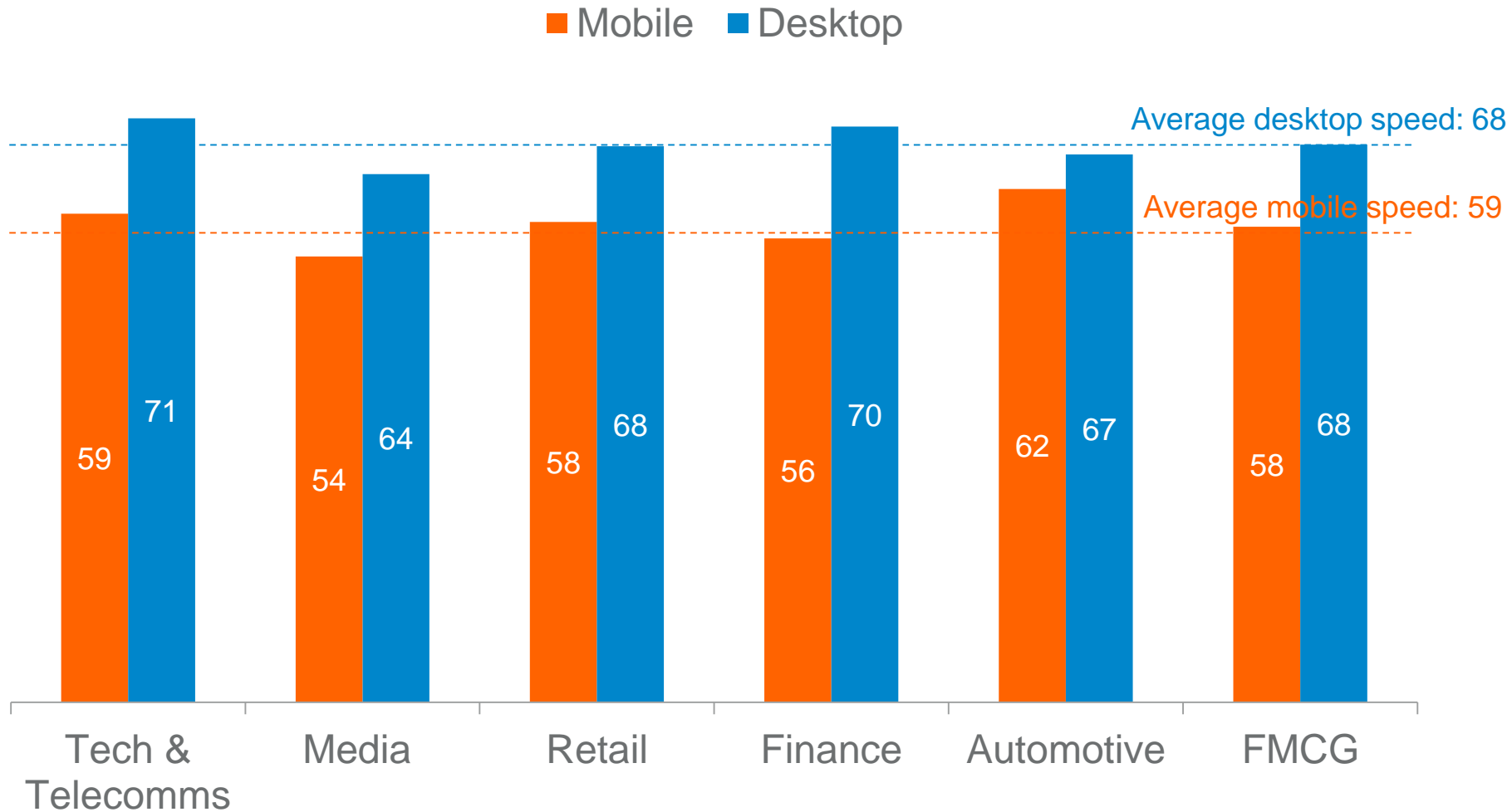


Average Mobile PageSpeed Score



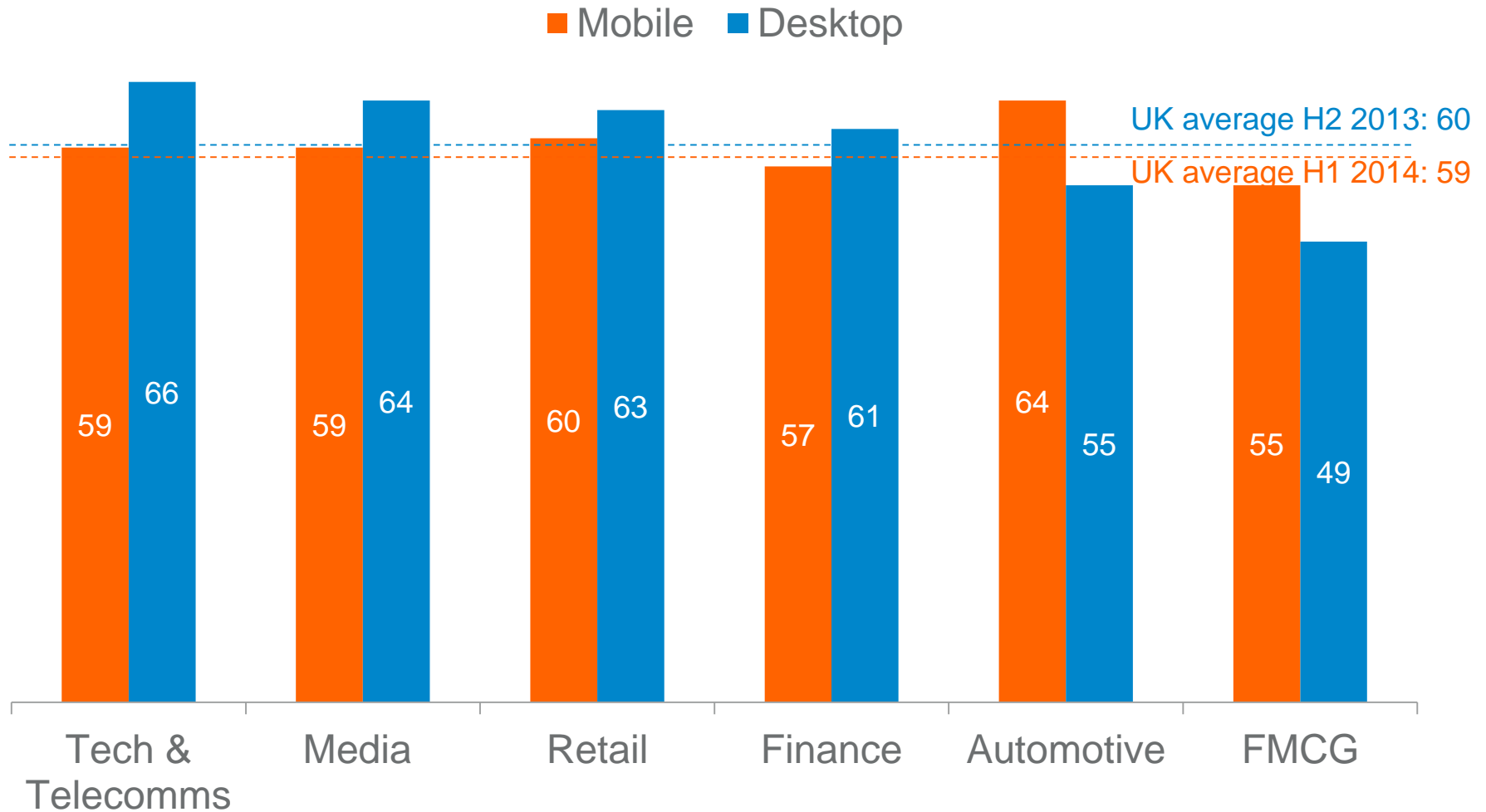


Average mobile and desktop PageSpeed score across sectors – Europe



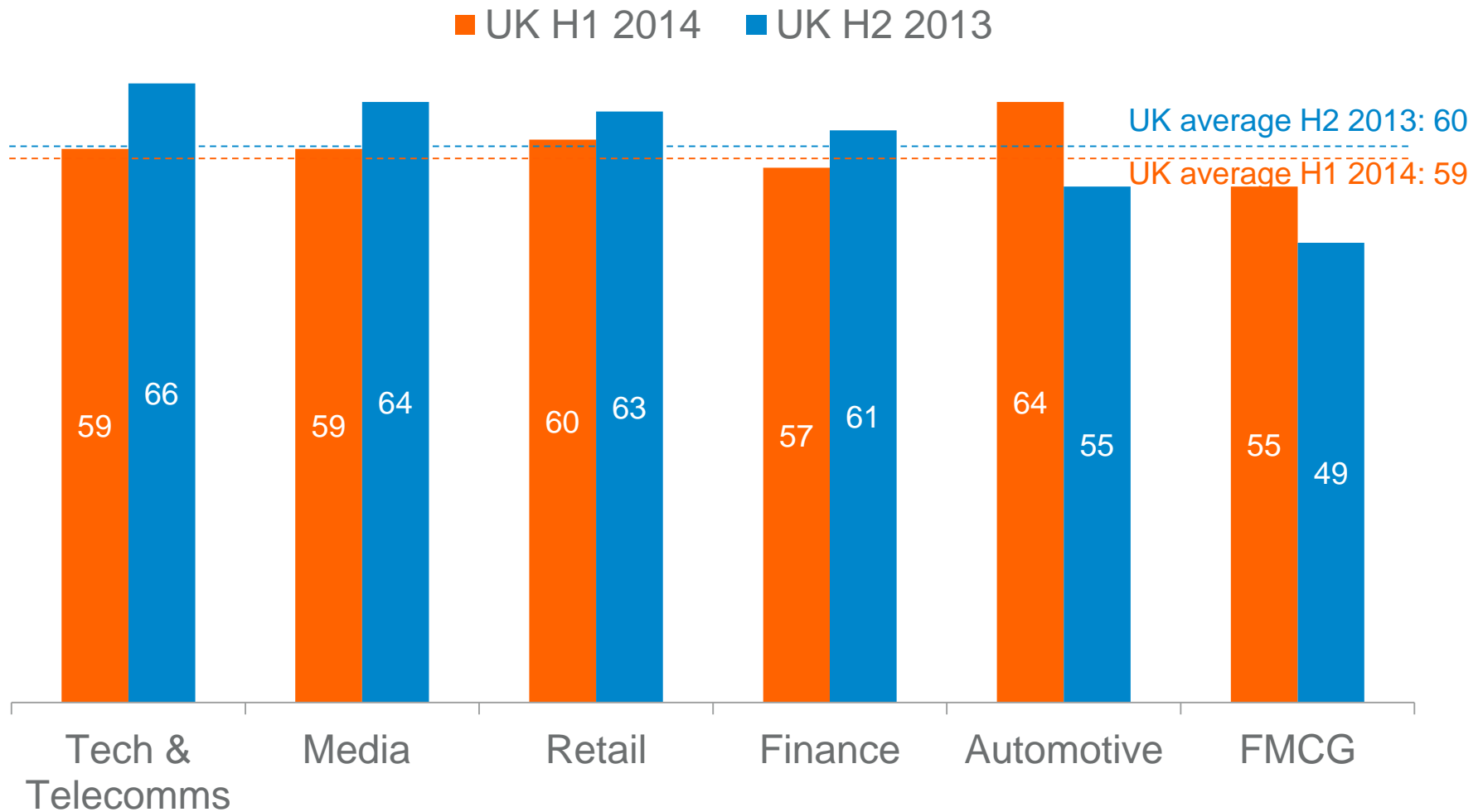


Average mobile PageSpeed score across sectors – UK



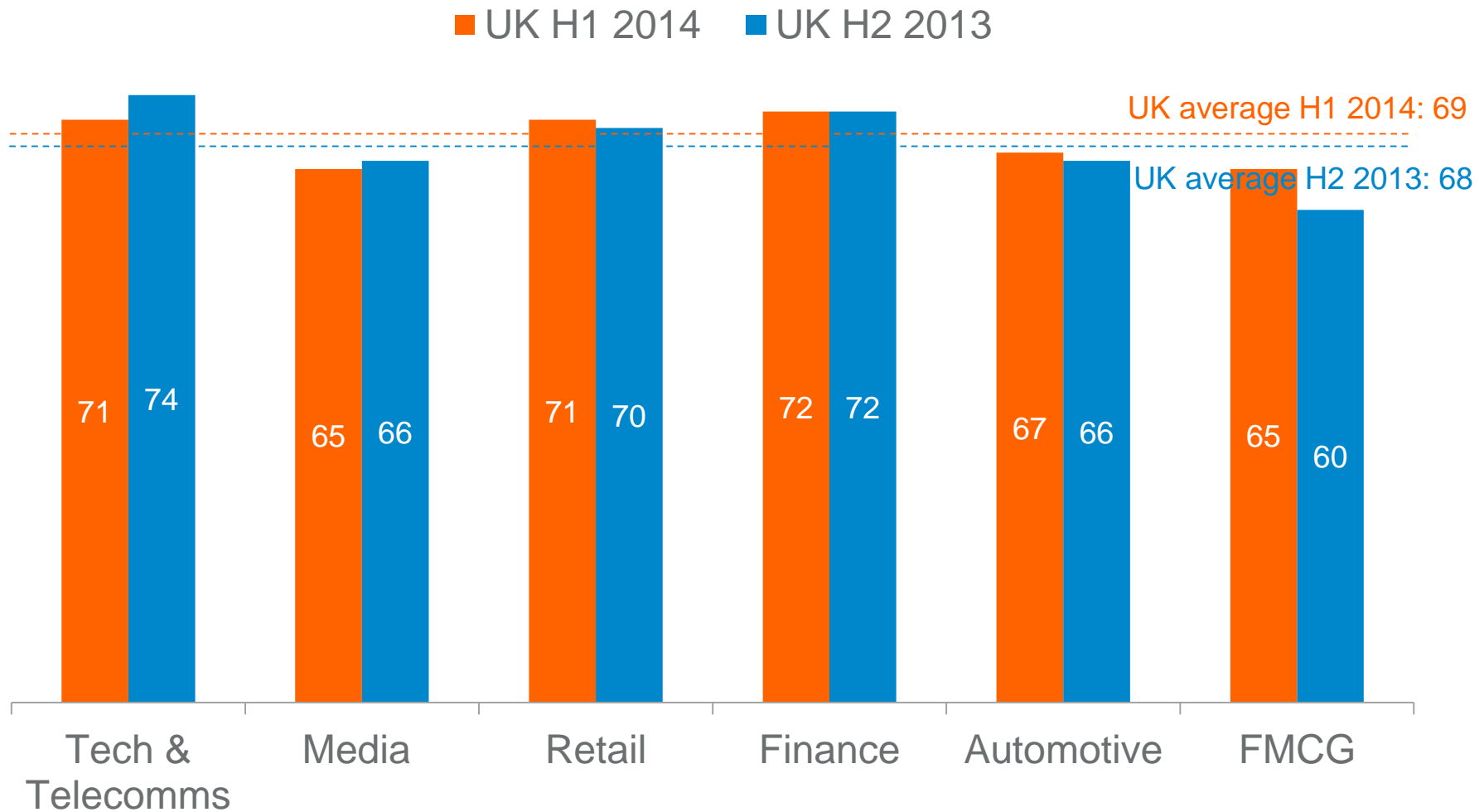


Average mobile PageSpeed score across sectors – UK



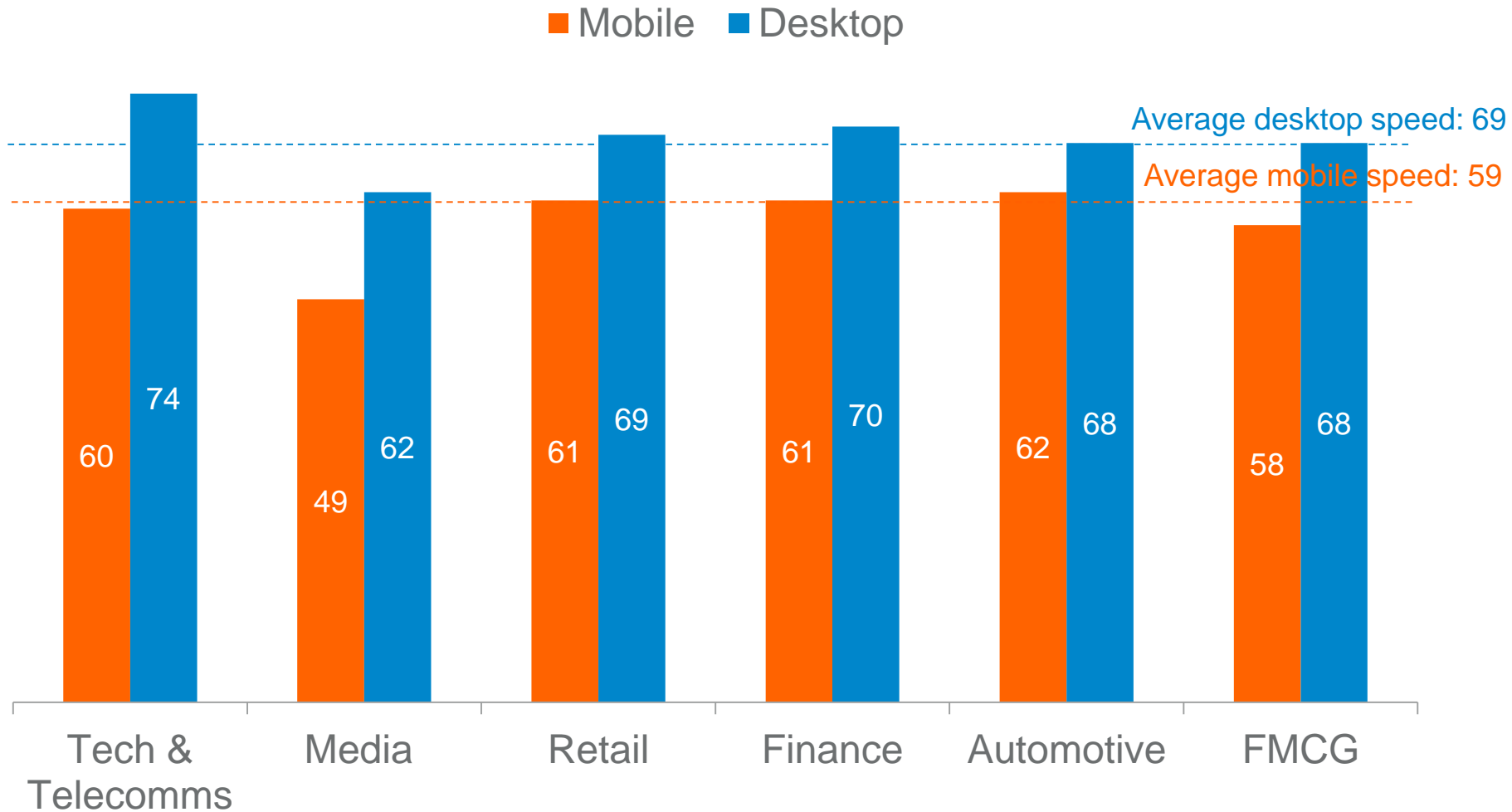


Average desktop PageSpeed score across sectors – UK



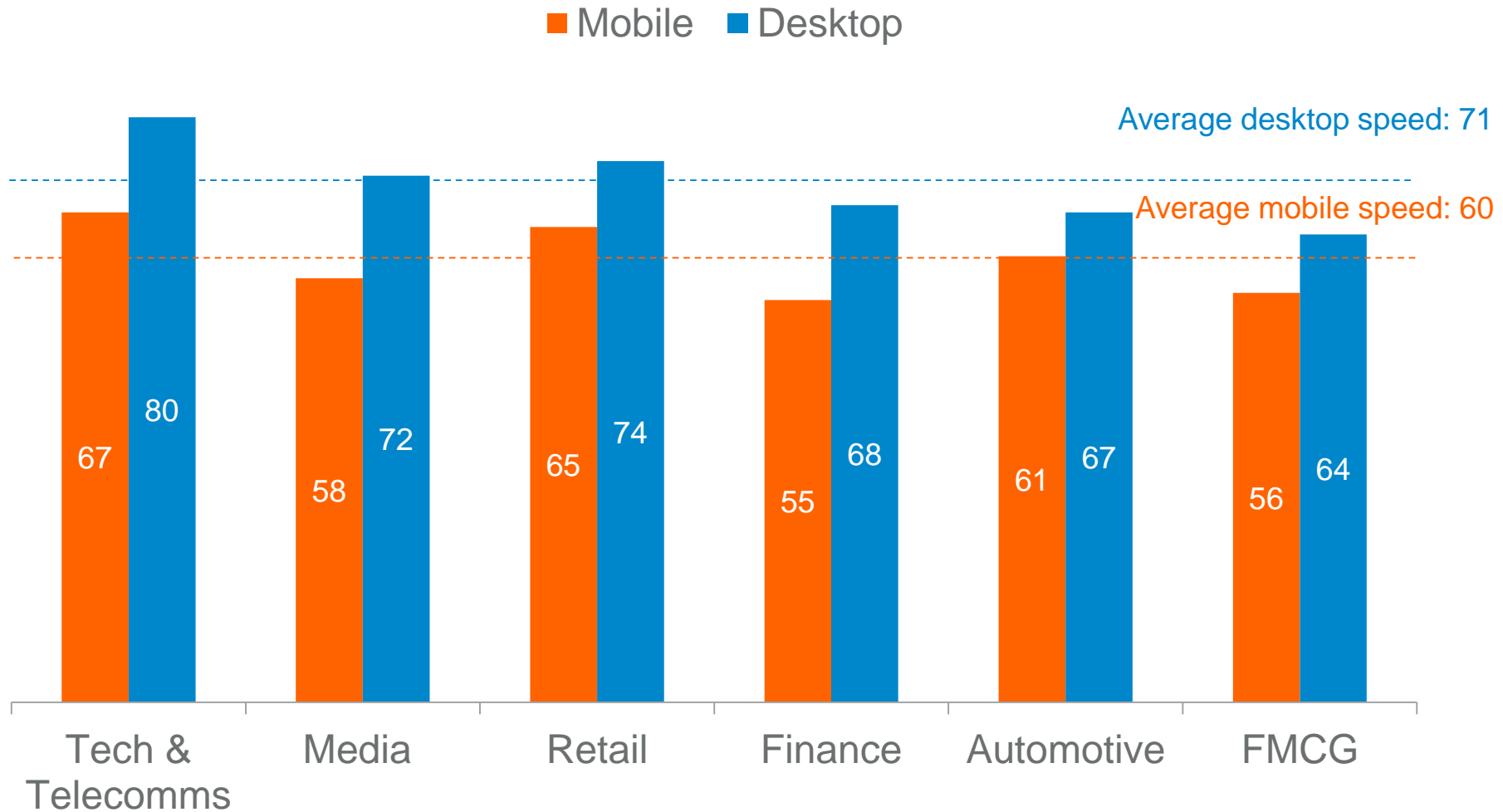


Average mobile and desktop PageSpeed score across sectors – France



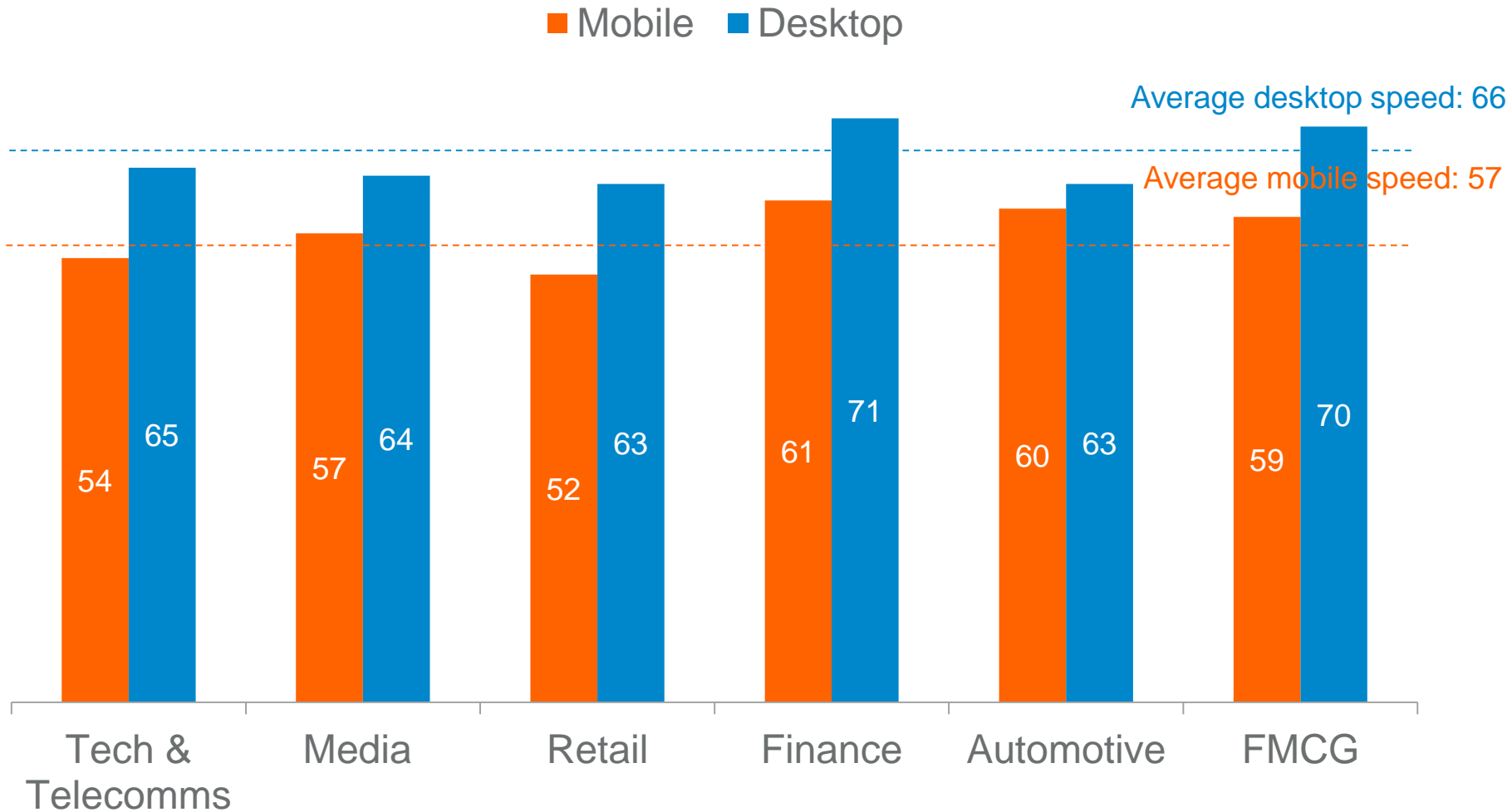


Average mobile and desktop PageSpeed score across sectors – Germany



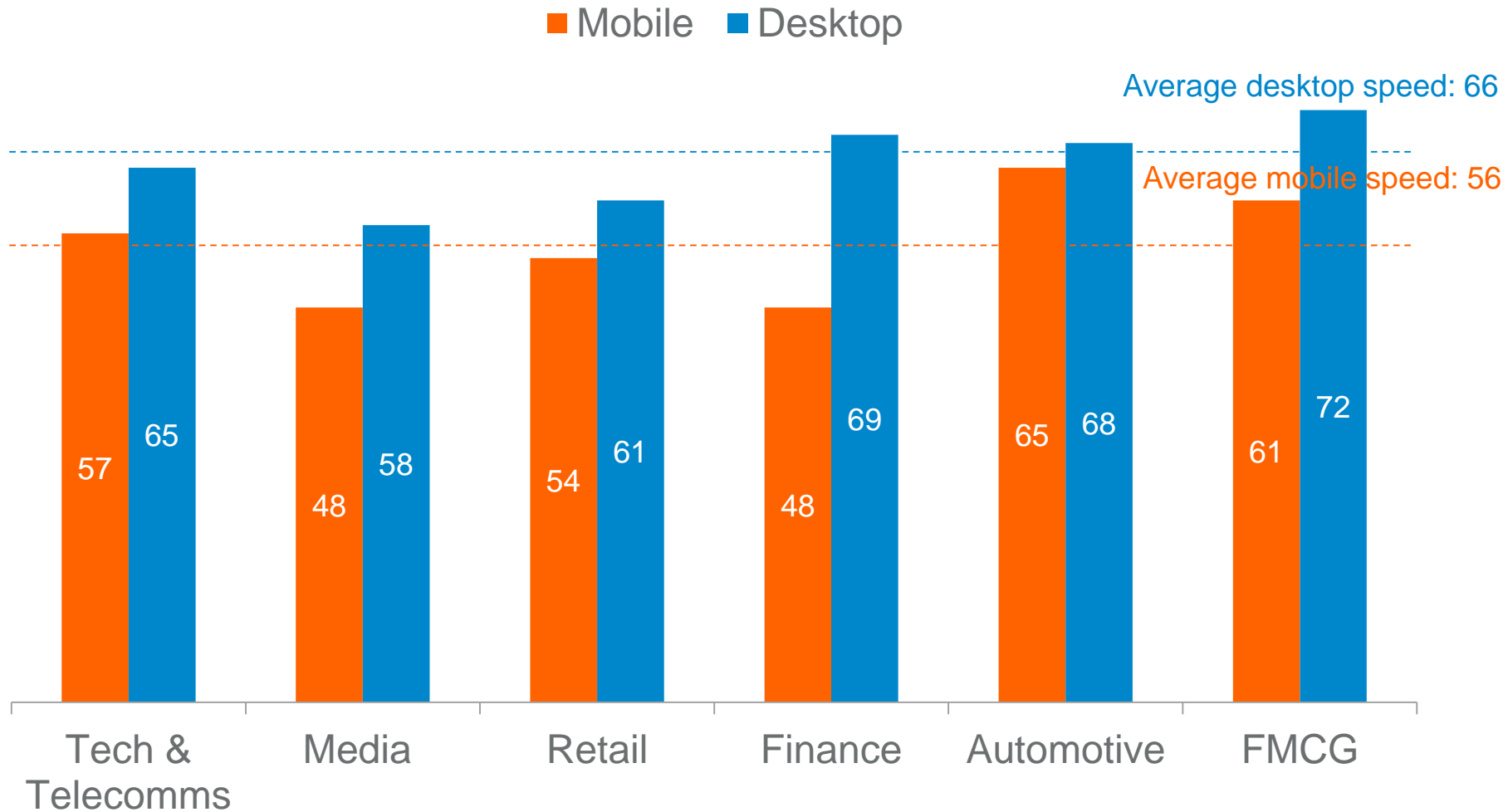


Average mobile and desktop PageSpeed score across sectors – Spain





Average mobile and desktop PageSpeed score across sectors – Italy





Summary

- **The UK Top 100 have the most optimised sites** of the countries we researched; levels across Europe vary
- More Top 100 UK advertisers are also **utilising responsive design** than last year – far more than their European counterparts.
- **PageSpeed** scores are in line across Europe – the UK's metric remains stable in comparison to August 2013



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Questions?
Patricia@iabuk.net