

KARGO

verto

# WEB VS APP

2019

WHICH MOBILE PLATFORMS OFFER THE MOST VALUE AND POTENTIAL FOR ADVERTISING?



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## ABSTRACT

Mobile devices are now the single most-used platform for media consumption with nearly 4 hours of use per day, just ahead of television.<sup>1</sup> Along with the rapid increases in usage, advancements in mobile technology are driving shifts in content creation, distribution, and consumption. How have these changes impacted marketers and advertisers looking to reach their audiences on mobile? Has this affected consumers' platform usage within mobile - specifically, consumer engagement in-app? And, where can advertisers achieve the best value on mobile in 2019?

## BACKGROUND

In 2017, Kargo published its landmark study, *Web vs. App*, which debunked many of the myths surrounding consumer interactions with the most common apps. The research found that as much as 20% of the time consumers spent on mobile was within mobile web, nearly equaling the time consumers spent on Facebook, the most commonly used app at the time.

Two years later, mobile is now uniformly recognized by brand marketers not simply as a discretionary platform for advertising, but rather as a key component to a brand's overall marketing strategy. Yet the question remains: How much budget should brand marketers allocate to mobile web vs in-app?

To get a better understanding of the current state of consumer mobile traffic and browsing behaviors, this study set out to answer the following:

- 1 How has app usage changed over the past two years?
- 2 How do consumers interact with the myriad categories of apps?
- 3 When and where are consumers accessing mobile web content?
- 4 What is mobile web's place in the overall mobile landscape?

## METHODOLOGY

Kargo partnered with Verto Analytics to measure how consumer consumption behavior differs across mobile web and mobile app. Data was collected from Verto Analytics' opt-in Cross Platform Smart Panel, which passively tracks and reports consumer device usage. Web traffic and in-app web usage was measured by traffic calls through a VPN on the user's device. The panel data was weighted and projected to represent the US online A18+ population and then averaged and aggregated into specific metrics of interest on a monthly basis. This study was designed to expand upon the company's 2017 study, also titled *Web vs. App*. Data for the 2019 study was tracked over a three-month period from December 2018 through February 2019 to replicate the same calendar cycle as the 2017 study.

<sup>1</sup> eMarketer, April 2019; "US Average Time Spent per Day with Mobile"

# KEY FINDINGS

1

## MOBILE WEB HAS THE POTENTIAL TO REACH THE MOST CONSUMERS

Mobile web benefits from its accessibility and reaches 85% of all mobile device users in any given month. Consumers access the web on average seven sessions for 33 minutes of use per day.

In comparison, the next most-used platform is Facebook, which reaches 68% of all mobile users and accounts for about 27 minutes of use per day.

Out of all apps in the mobile ecosystem, only the top ten apps reach at least 20% of mobile users, and only some offer opportunities for advertising.

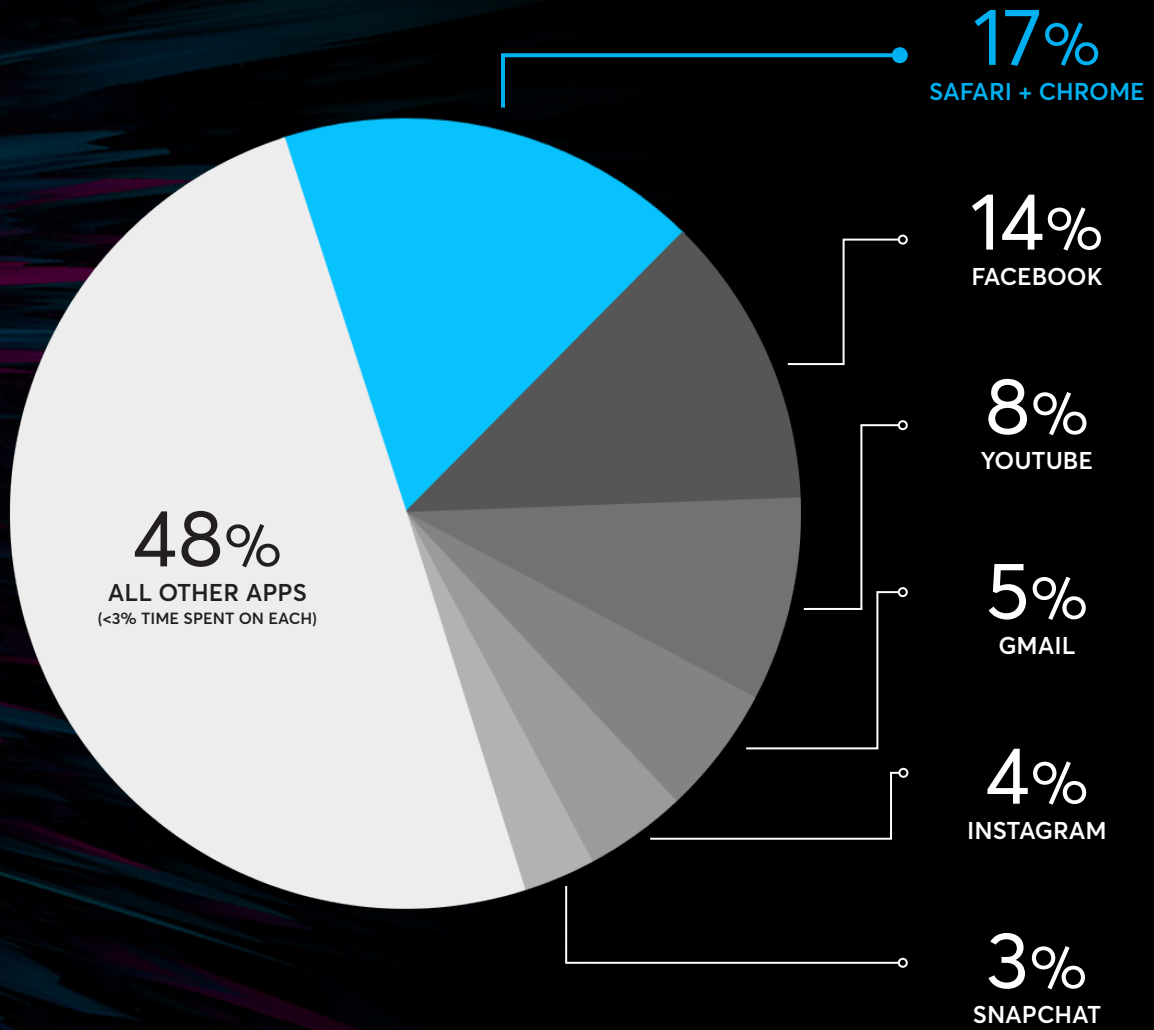
	REACH	AVERAGE SESSIONS PER DAY	AVERAGE TIME SPENT PER DAY
TOTAL MOBILE WEB	85%	7.2	32.7
----- BASED ON APP ACCESS -----			
FACEBOOK	68%	5.4	26.7
YOUTUBE	59%	1.5	15.7
GOOGLE MAPS	53%	0.8	3.9
AMAZON	48%	0.6	1.9
GMAIL	47%	3.8	6.3
INSTAGRAM	38%	3.2	10.3
TWITTER	25%	2.2	7.0
GOOGLE CALENDAR	23%	0.6	0.8
SNAPCHAT	23%	3.9	7.2
NETFLIX	20%	0.4	7.1

# 2

## TIME SPENT PER PLATFORM IS DIVERSIFYING BUT MOBILE WEB HOLDS THE LEAD

In Kargo's 2017 study, Web vs. App, mobile web represented about a quarter of all time spent on mobile, just behind Facebook. Now, the mobile ecosystem has become more fragmented and consumers are spending a higher proportion of time in apps like YouTube, Gmail, and Instagram.

Consequently, mobile web and Facebook share of time spent have each declined as a proportion of total time spent. Mobile web is now the single most-used platform, representing approximately 17% of all time spent on mobile. Facebook accounts for 14%, and YouTube is close behind accounting for 8% of time spent. This time spent becomes increasingly insignificant outside of the top ten apps, averaging less than a fraction of daily usage per the millions of long-tail apps available.





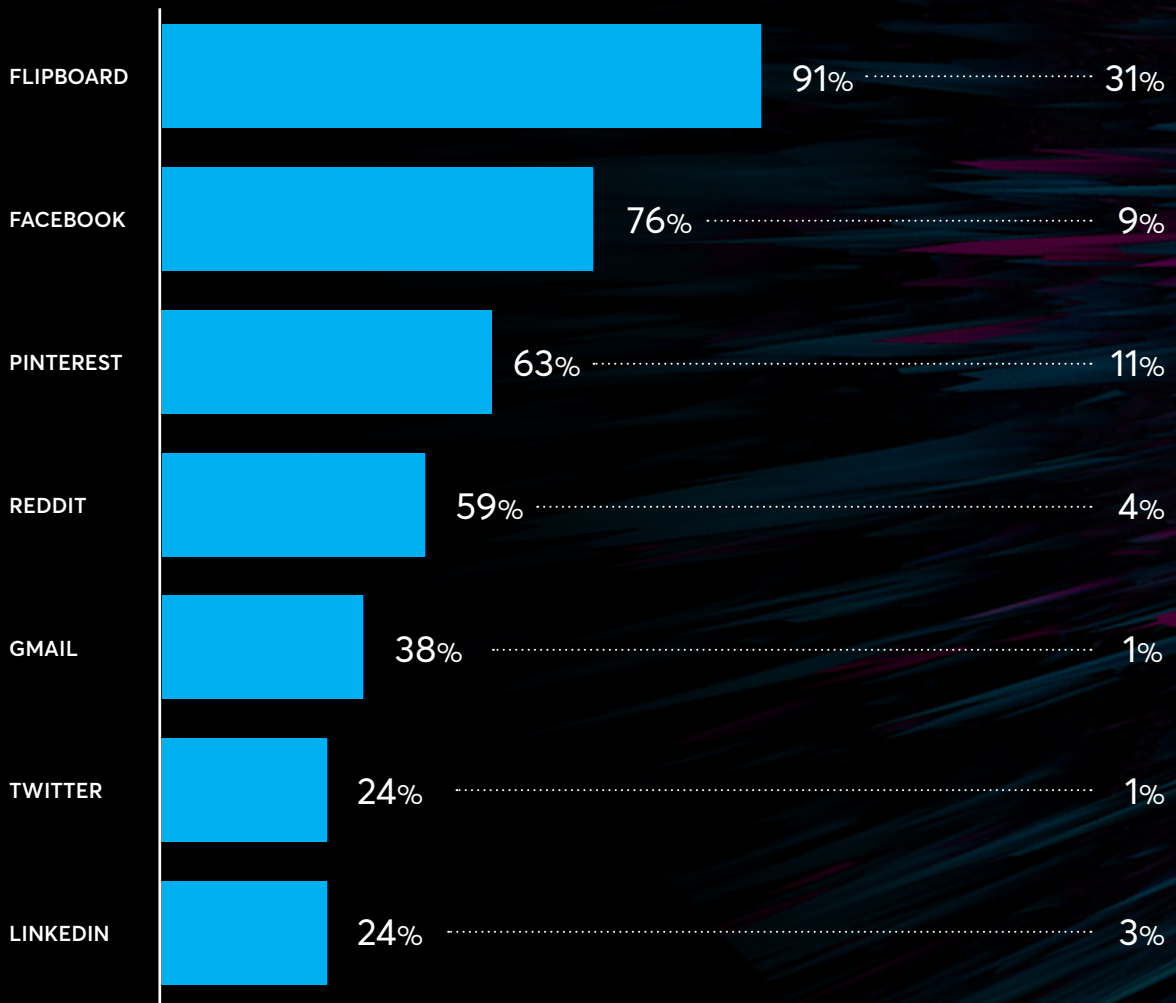
# 3

## IN-APP WEB USAGE IS A SIGNIFICANT CONTRIBUTOR TO TIME SPENT WITHIN MANY TOP APPS

Unbeknownst to many, much of in-app content consumption actually occurs on the web when links are clicked inside the app and the content is opened within an embedded browser. This time spent is not negligible – in many cases, the research found that a majority of users actively consume web content while in-app, as was the case with Flipboard and Facebook. Approximately 30% and 10% of the total time spent on Flipboard and Facebook, respectively, can be attributed to time allocated to browser usage while in the app.

PERCENTAGE OF iOS APP USERS WHO VISITED WEB CONTENT IN-APP

PERCENTAGE OF TIME SPENT IN-APP ON WEB CONTENT

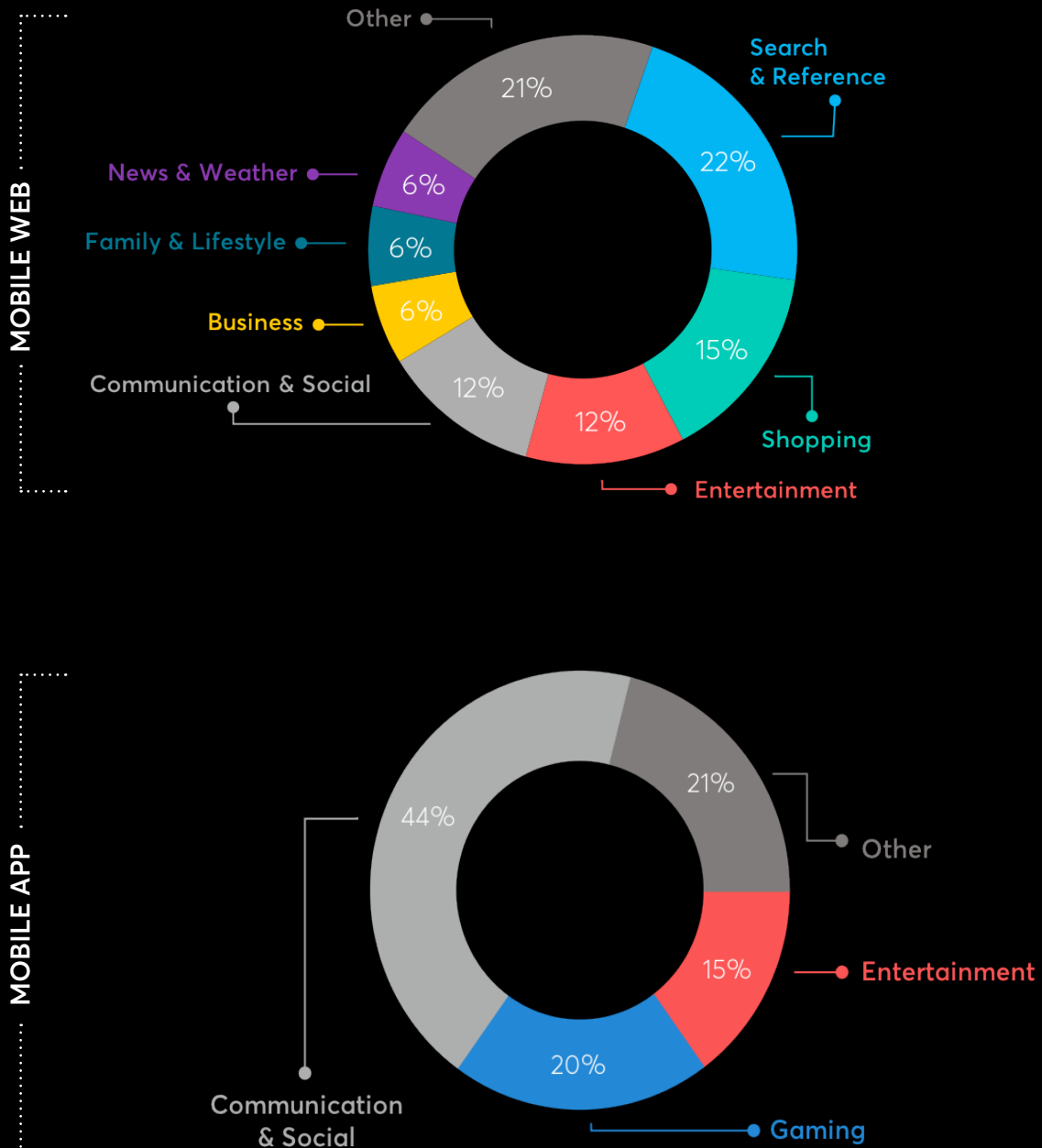


# 4

## EACH PLATFORM IS USED FOR DIFFERENT CATEGORIES OF CONSUMPTION

Mobile web and mobile apps each have unique purposes. Apps are generally used for three categories: entertainment (e.g. YouTube, Netflix), games (e.g. Pokemon Go, Candy Crush), or social (e.g. Facebook, Gmail, Instagram). Conversely, mobile web usage spans across more than eight categories including search & reference, shopping, & entertainment.

PERCENTAGE OF TOTAL TIME SPENT BY CATEGORY



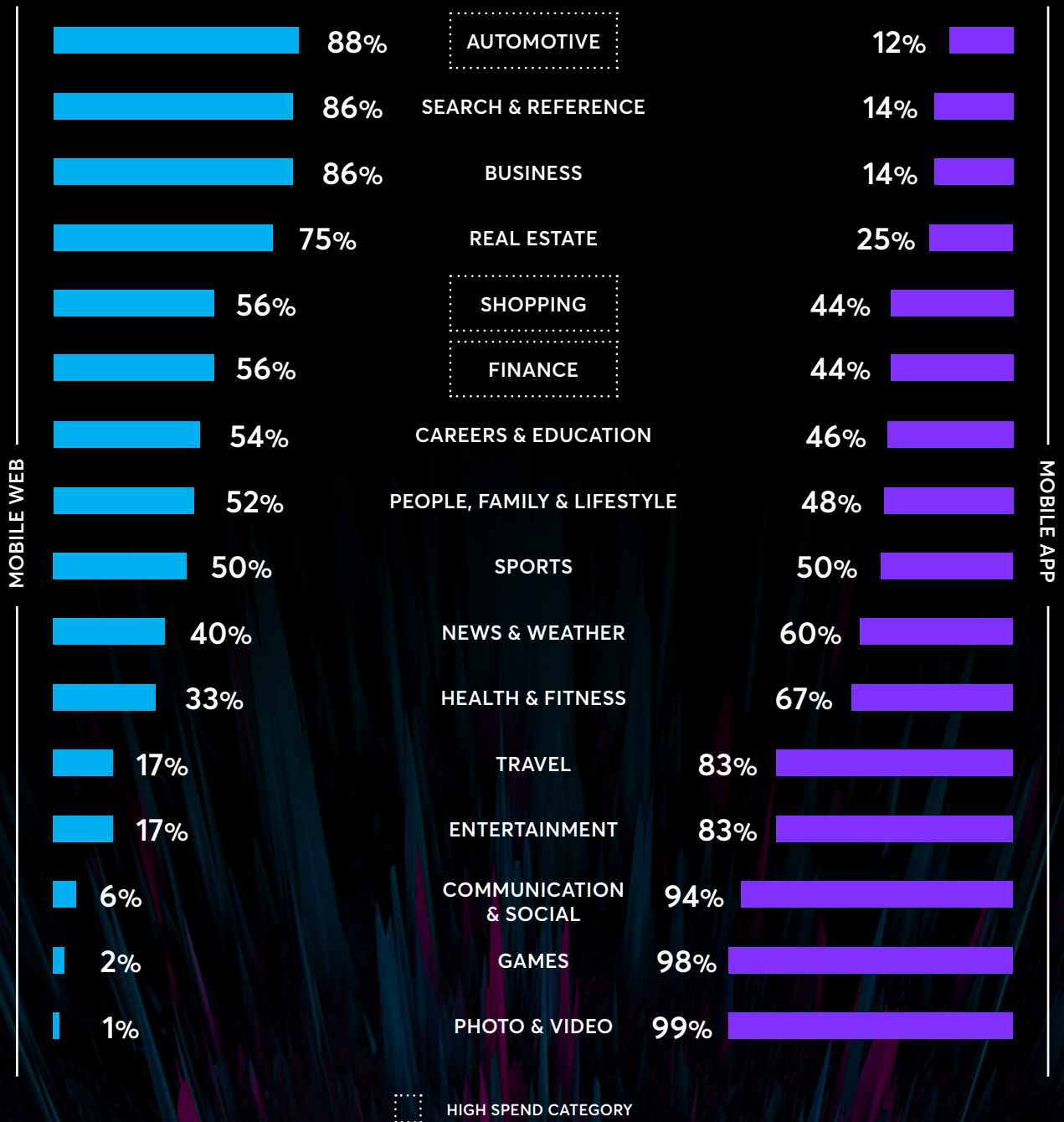
# 5

## EACH CATEGORY OFFERS UNIQUE VALUE TO ADVERTISERS

When comparing the proportion of time consumers spend within each category by platform, there are also disparate differences in how each is used. Consumers use apps almost exclusively for photo & video, games, or social content, whereas mobile web is preferred for categories related to automotive, search & reference, business, & real estate.

When strategizing where to advertise, consider which platform offers the most relevance for the brand. Apps offer a multitude of social content and games while mobile web offers relevance in high-value advertising categories.

PERCENTAGE OF TIME SPENT ON EACH CATEGORY BY PLATFORM





# EXECUTIVE SUMMARY



## WEB IS THE NUMBER ONE SOURCE OF TIME SPENT ON MOBILE

While mobile usage has increased over the past two years, app use preferences have changed. Average time spent on Facebook has declined, and consumers are splitting time amongst other top apps, leaving mobile web as the dominant single platform.



## IN-APP WEB USAGE STILL ACCOUNTS FOR A SIGNIFICANT AMOUNT OF TIME SPENT IN APP

About 9% of Facebook app usage is spent on consuming web content while some apps, such as Flipboard, facilitate even more web traffic.



## MOBILE WEB OFFERS UNIQUE AND HIGH VALUE ADVERTISING OPPORTUNITIES

App usage is primarily limited to social, entertainment (e.g. video), and gaming content. Contrarily, mobile web usage spans all categories of content, including high-value categories such as automotive, shopping, and finance.