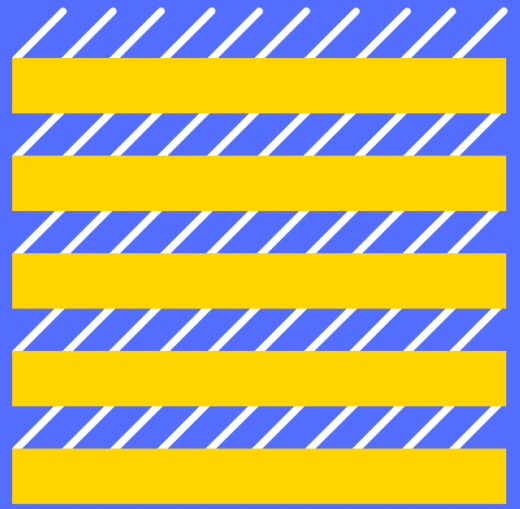
Mobile First or Mobile Only

Yanina Vidal ,
Industry Manager
Google UK



We love the web

Reach

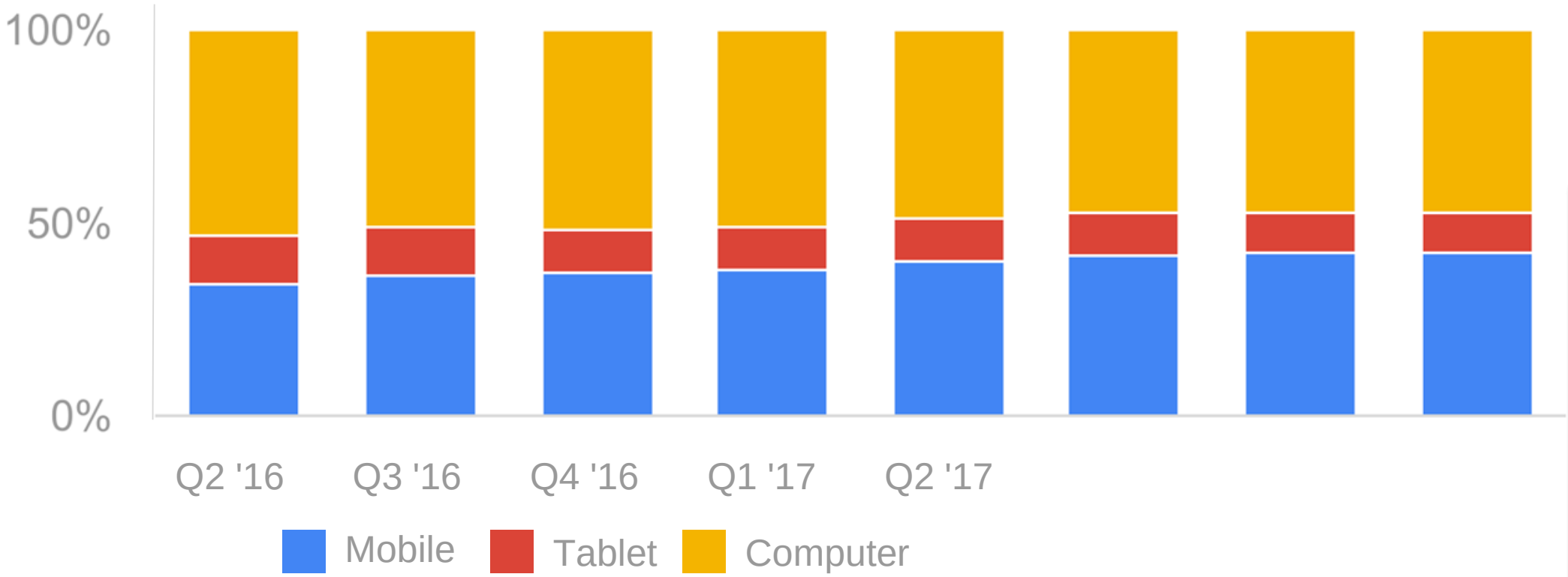
5B devices connected

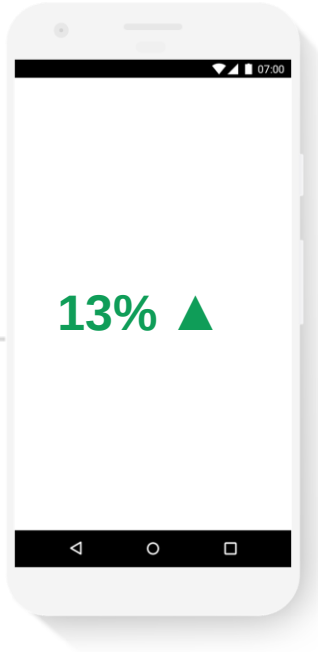
Open

Anyone can build an audience

Source: we are social

43% of Insurance Search is on Mobile...





...and across all categories

MOBILE (% Total Queries)

Car Insurance

device	2018_...
Mobile	52 %
Desktop and tablet	48 %

Home Insurance

device	2018_...
Desktop and tablet	65 %
Mobile	35 %

Travel Insurance

device	2018_...
Desktop and tablet	61 %
Mobile	39 %

Life Insurance

device	2018_...
Mobile	55 %
Desktop and tablet	45 %

Pet Insurance

device	2018_...
Mobile	50 %
Desktop and tablet	50 %

Energy

device	2018_...
Desktop and tablet	62 %
Mobile	38 %

Broadband

device	2018_...
Desktop and tablet	59 %
Mobile	41 %

Business Insurance

device	2018_...
Desktop and tablet	59 %
Mobile	41 %

Van Insurance

device	2018_...
Desktop and tablet	50 %
Mobile	50 %

Landlord Insurance

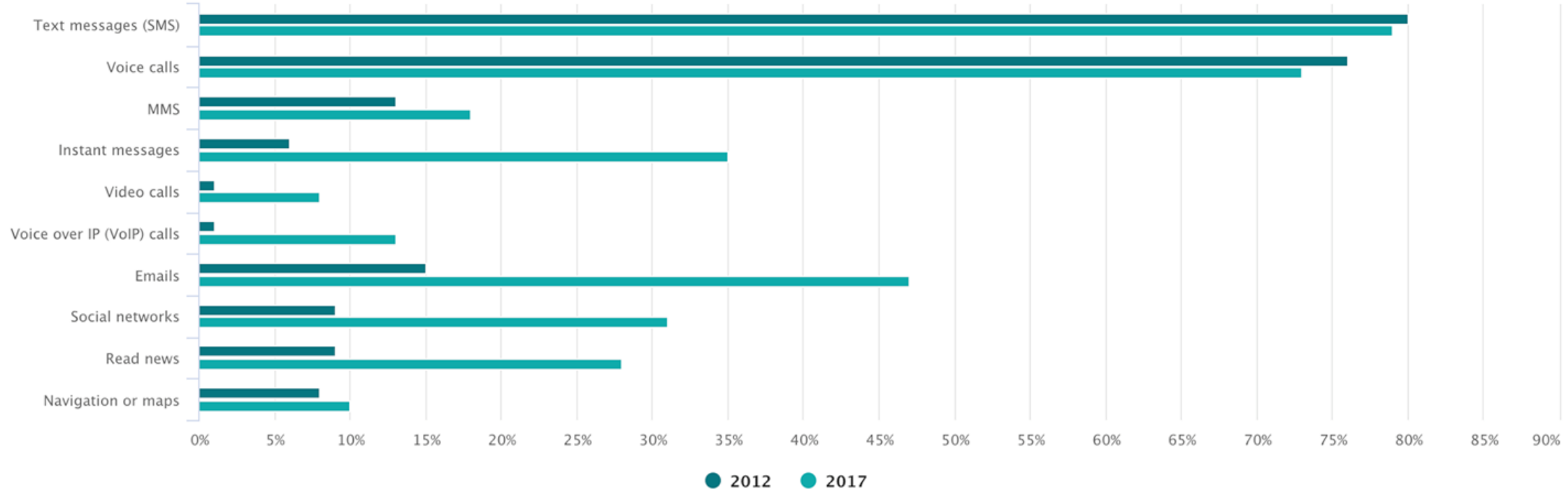
device	2018_...
Desktop and tablet	71 %
Mobile	29 %


The Mobile Trend
is Millenial only?

In the last five years, use of instant messaging applications/services among 55-75 year olds has increased by 29 percentage points.

Chart

Applications/services used on a weekly basis among 55-75 year olds, 2012 vs 2017



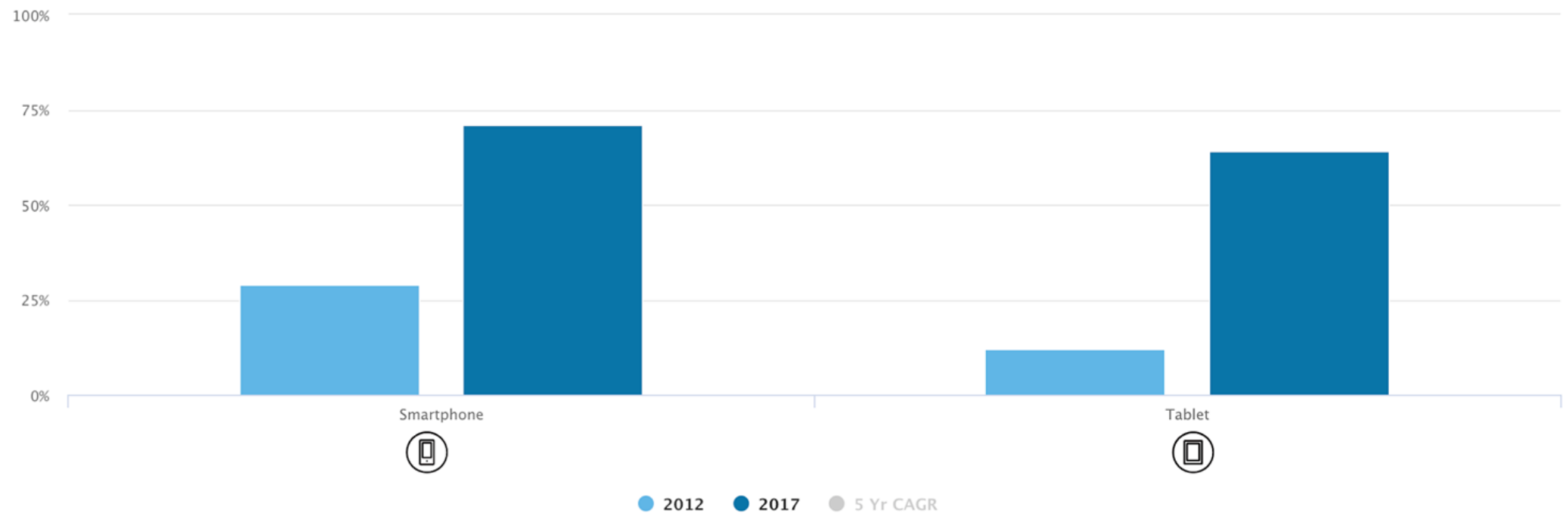
Note: The wording for 'MMS was 'Picture or video messages (MMS)' in the 2012 edition. The wording for 'Read news' was: 'News and sport websites' in the 2012 edition.
Weighted base (2012/2017): All phone owners aged 55-75 years (639/1,163)
Source: UK edition, Deloitte Global Mobile Consumer Survey, May-Jun 2012, May-Jun 2017

Smartphone penetration among 55-75 year olds has increased by 42 percentage points over the last five years.

Chart

Smartphone and tablet penetration among 55-75 year olds (2012 vs 2017)

Q. Which, if any, of the following devices do you own or have ready access to?



Weighted base (2012/2017): All respondents aged 55-75 years (639/1,260)
Source: UK edition, Deloitte Global Mobile Consumer Survey, May-Jun 2012, May-Jun 2017

And… How are we doing?

We are not there yet, WHY?

Complexity

New architectures
& patterns

Awareness

Lots to learn &
more coming

ROI

Justifying the
dev investment

Poor performance = lost opportunity

53% Bounce

After 3 seconds

79% Abandon

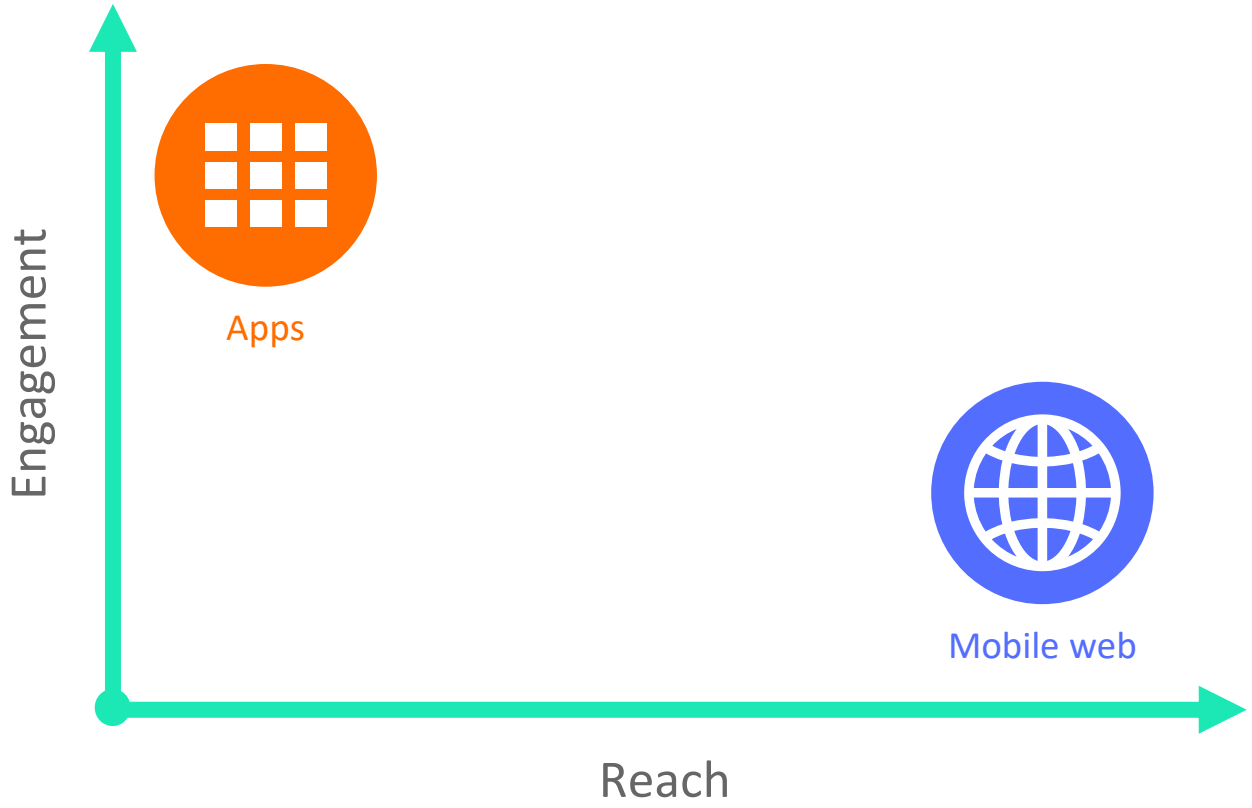
Sites with poor performance

7% Drop

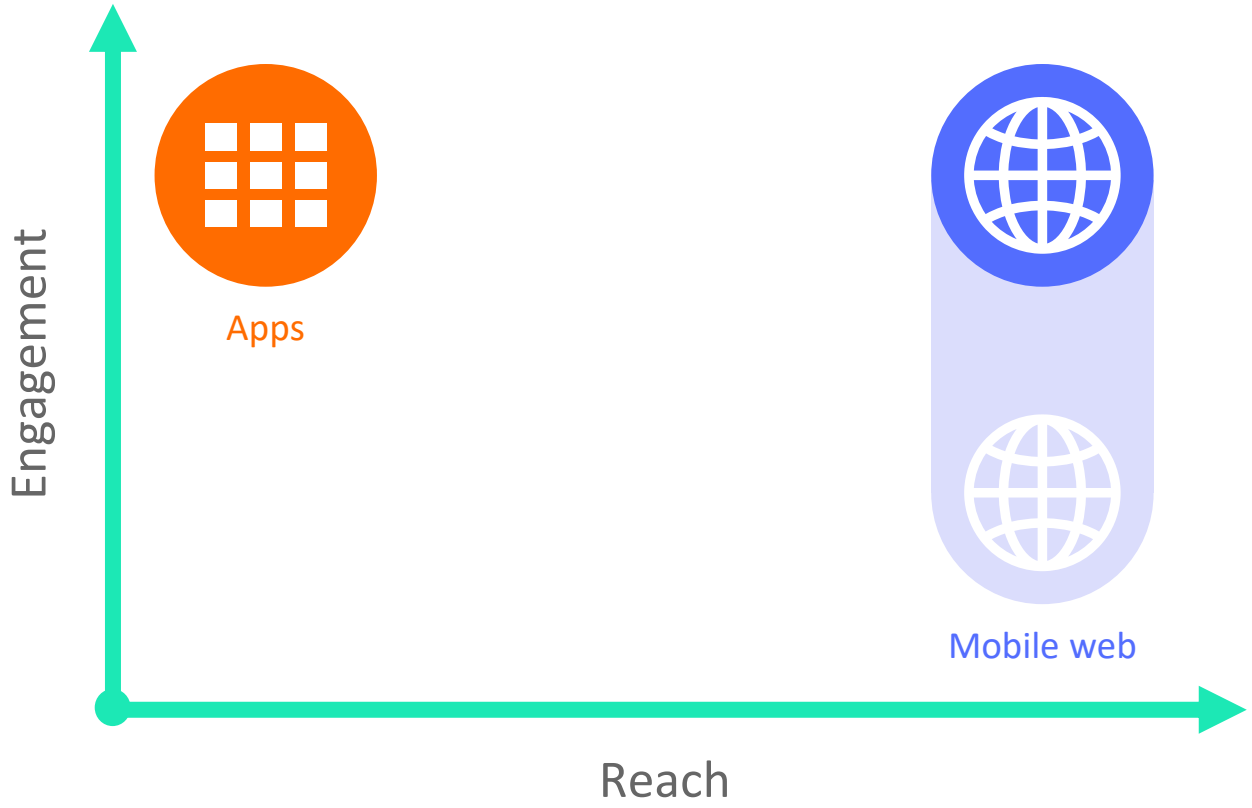
In revenue for every 1 second delay

Source: Doubleclick: "The need for mobile speed: How mobile latency impacts publisher revenue"

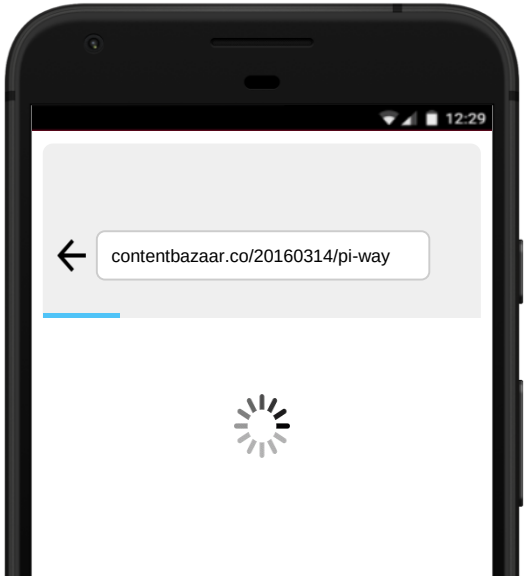
Historically, the web's reach has outmatched its engagement



But the tools now exist to ensure great engagement matches limitless reach



Pages Load Slowly



Scrolling Is Nonresponsive

Content Shifts Around

Doesn't Work on Flaky Connections

It is very important to create a

good mobile experience.

47% of

consumers expect sites to load in <2 seconds and will abandon if >3 seconds.

Source: "What users want most from mobile sites today"

Source: "How loading time affects your bottom line"

What is ~~speed~~?

the perception of speed

0.1s

Real-Time

Physical world interaction delay

Acceptable

Delay is noticeable, but acceptable

1s

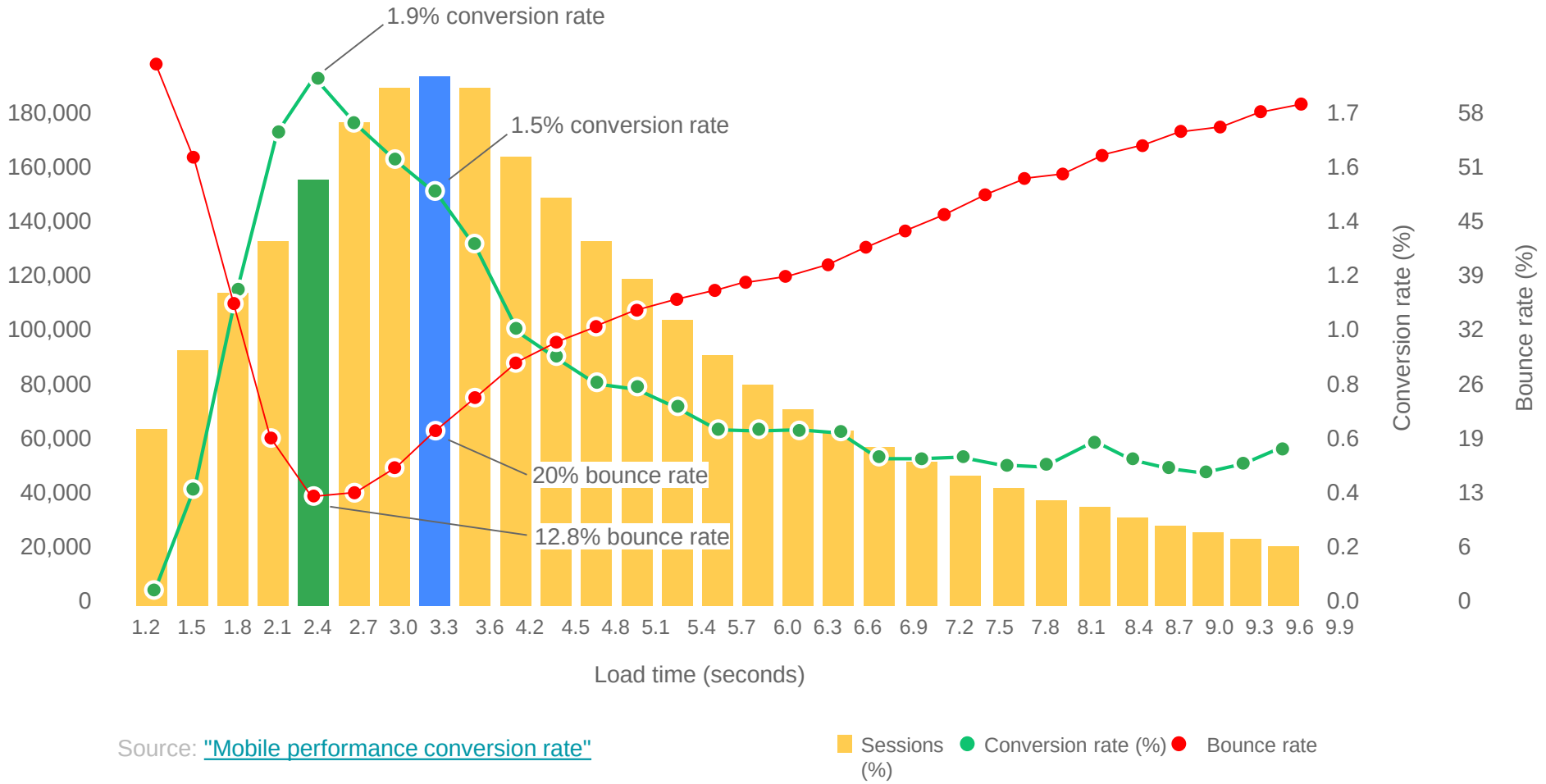
10s

Lost

Attention is re-focused elsewhere

Source: "Response Times: The 3 Important Limits"

Mobile pages that **load 1s faster** see up to **+27% CvR**



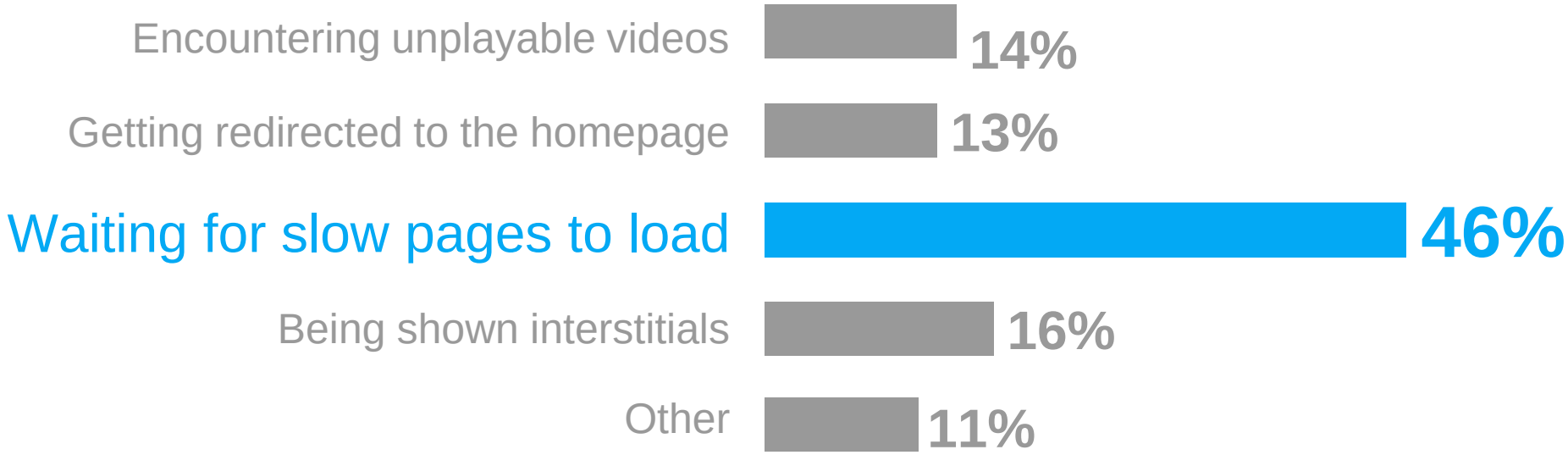
Source: "Mobile performance conversion rate"

Note: Some of pages with load times faster than 2.4 seconds experienced lower conversion rates.

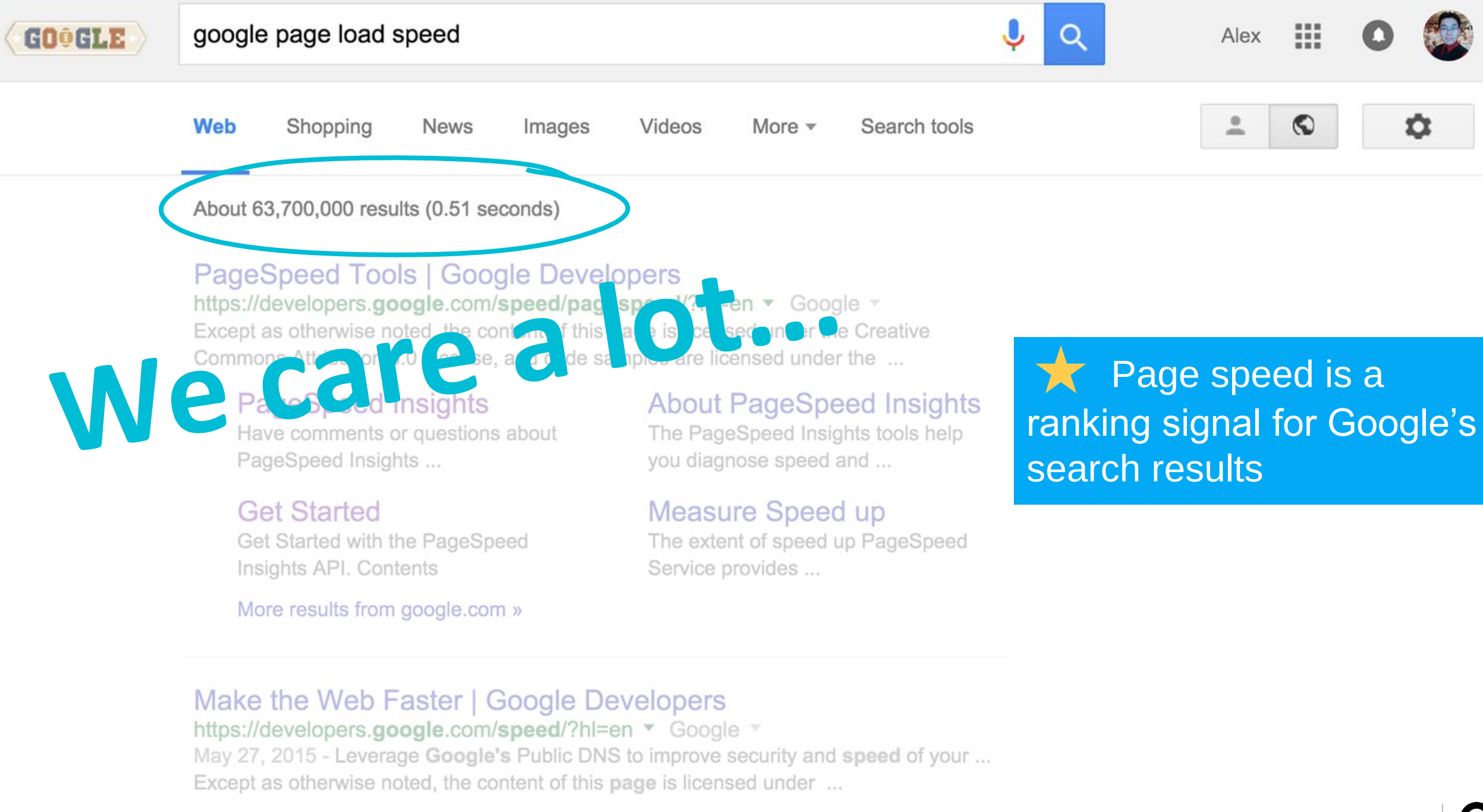
Those numbers may be influenced by faster response/page load times for 404s and other errors.

Google Poll:

"what do you dislike the most when browsing the web on your mobile device?"



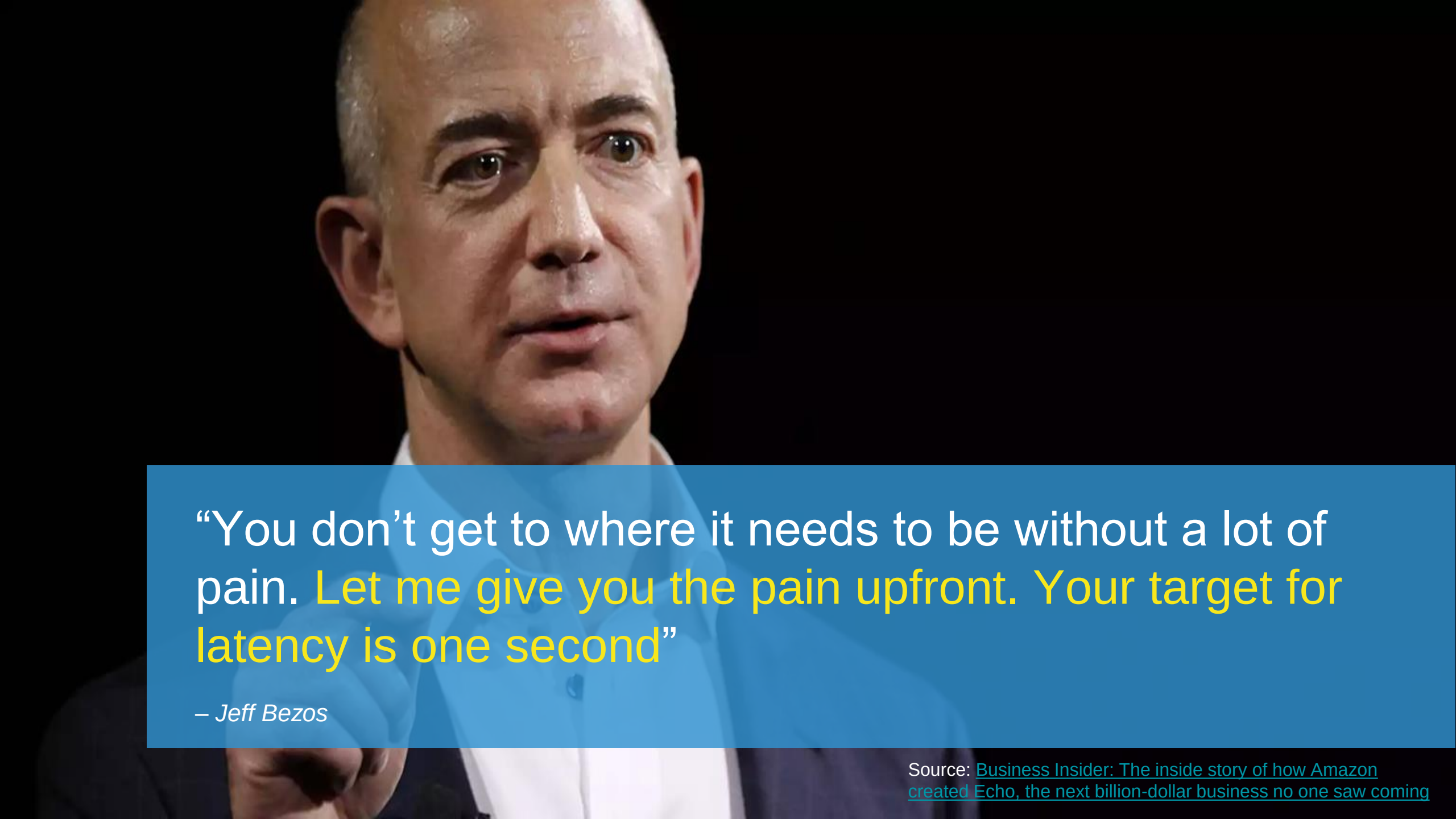
Source: "Google Webmaster Central Blog: "#MobileMadness: a campaign to help you go mobile-friendly" (posted: Monday, April 27, 2015)"



We care a lot...

★ Page speed is a ranking signal for Google's search results

Source: "Using site speed in ranking"

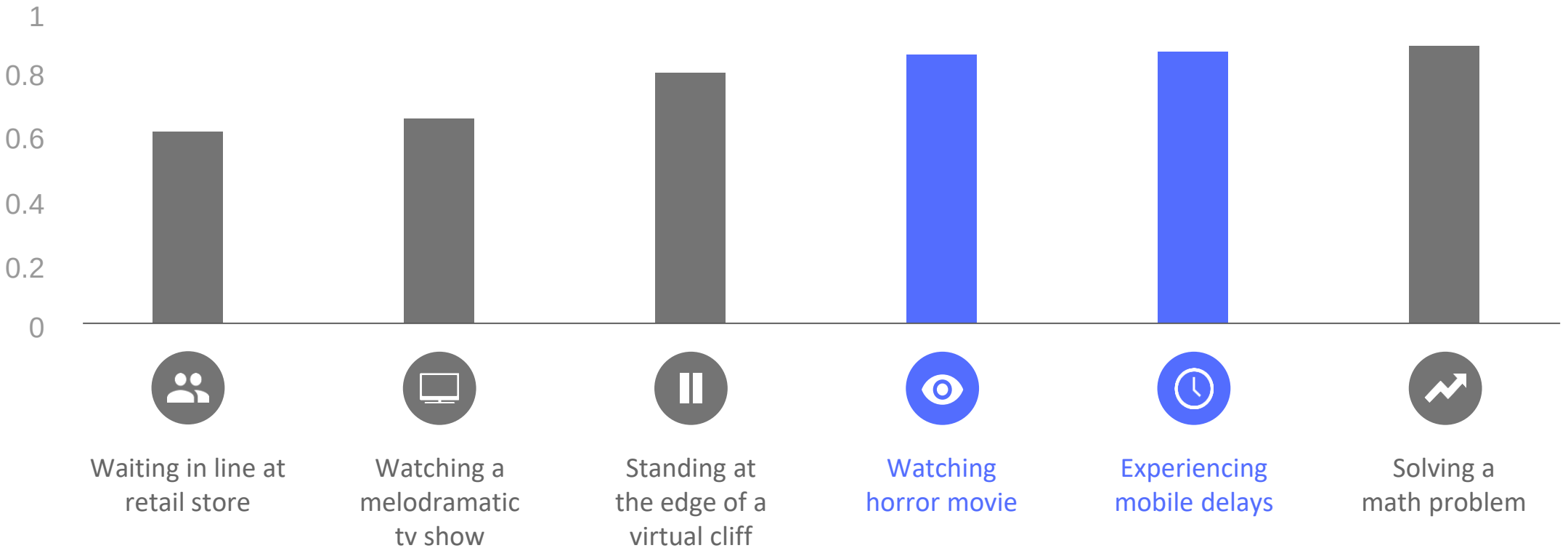


"You don't get to where it needs to be without a lot of pain. Let me give you the pain upfront. Your target for latency is one second"

– Jeff Bezos

Source: Business Insider: The inside story of how Amazon created Echo, the next billion-dollar business no one saw coming

Mobile delay stress = horror movie stress



Source: Ericsson ConsumerLab, Neurons Inc, 2015

How do we reduce people stress?

https://www.pexels.com/photo/photography-of-a-woman-meditating-906097/

AMP & PWA

The AMP Project

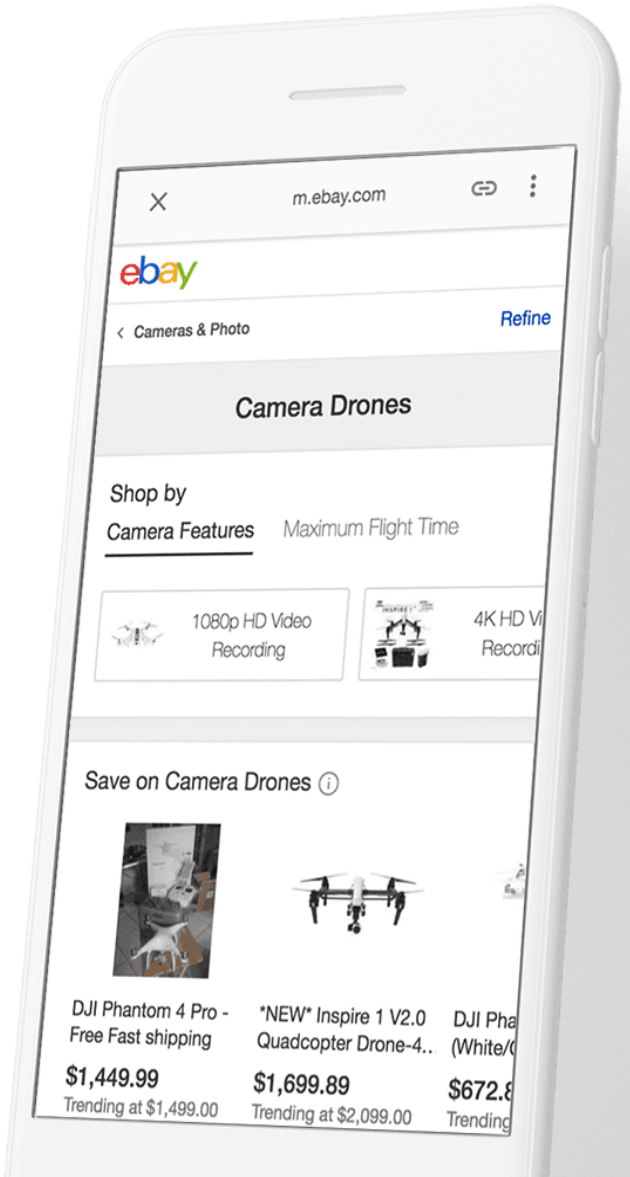
An open source initiative to enable a better web, with sites that are fast, beautiful, and monetize well

AMPs load on avg in 0.5 seconds from Google Search

AMP HTML

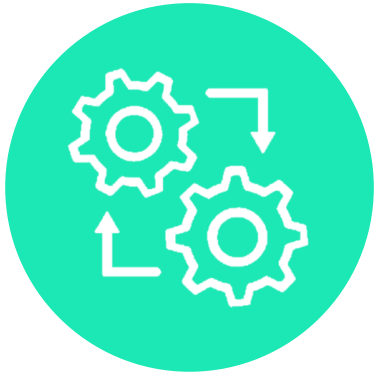
AMP JS

AMP Cache



Progressive Web Apps

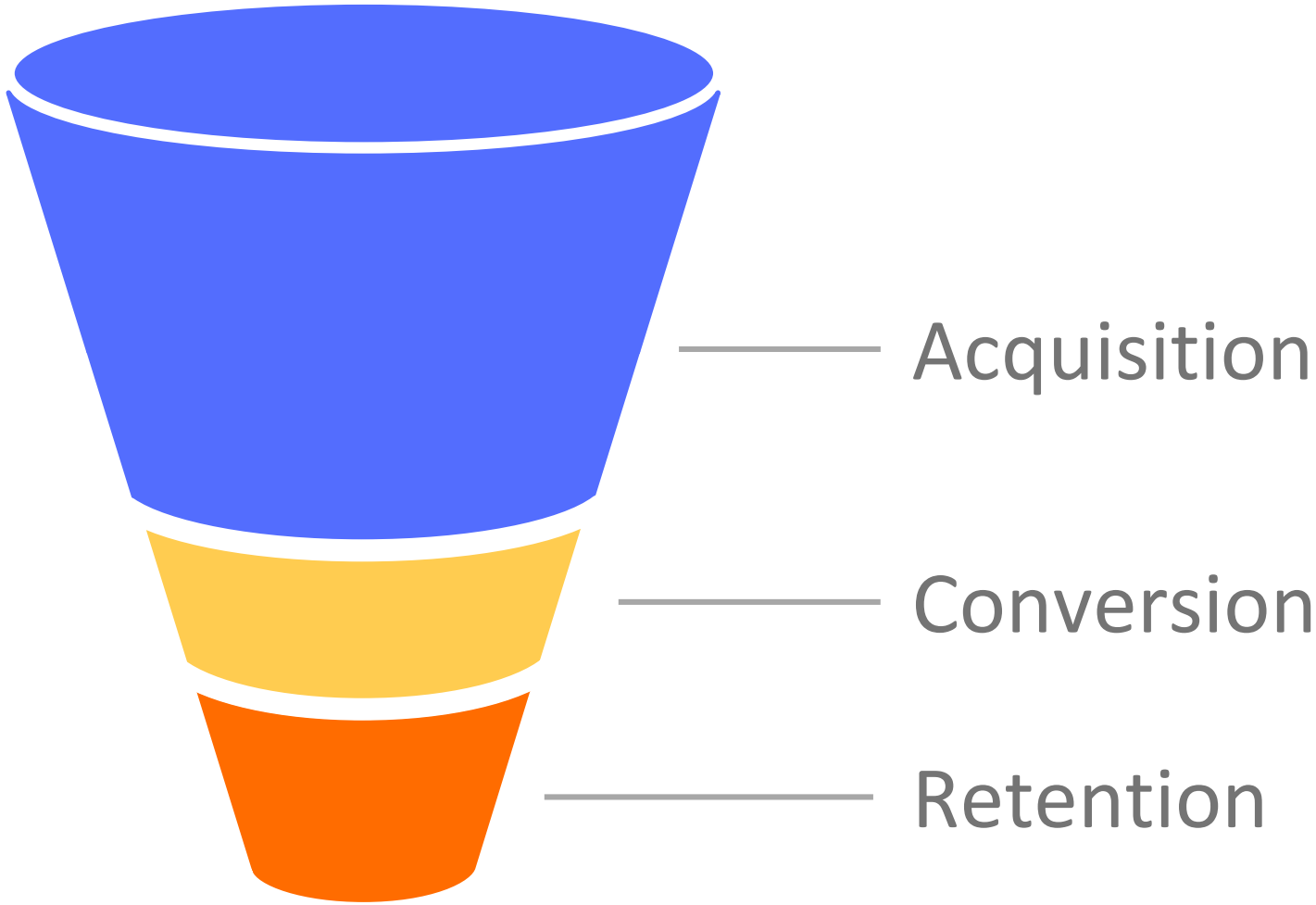
Fast

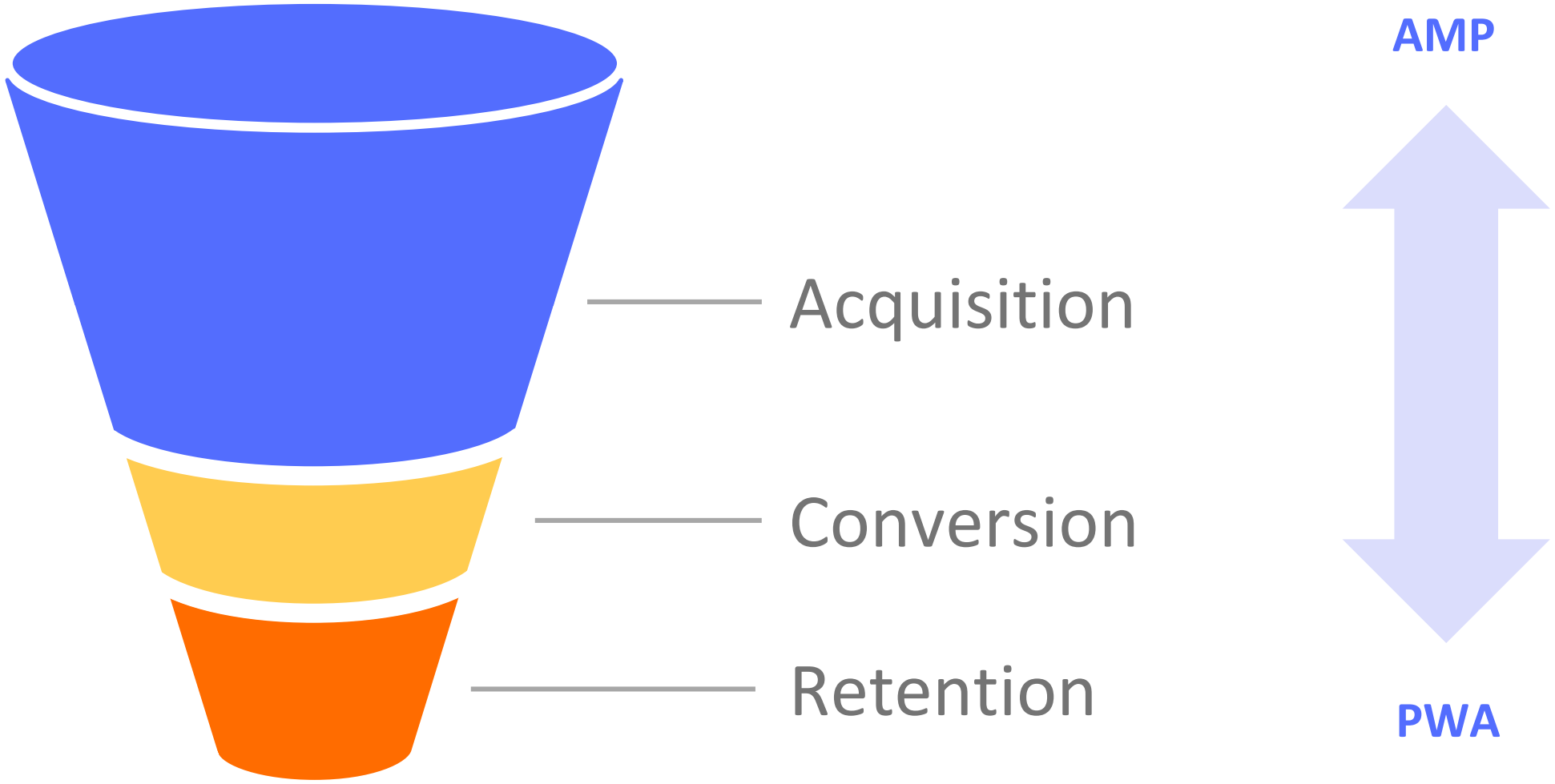


Integrated

Reliable

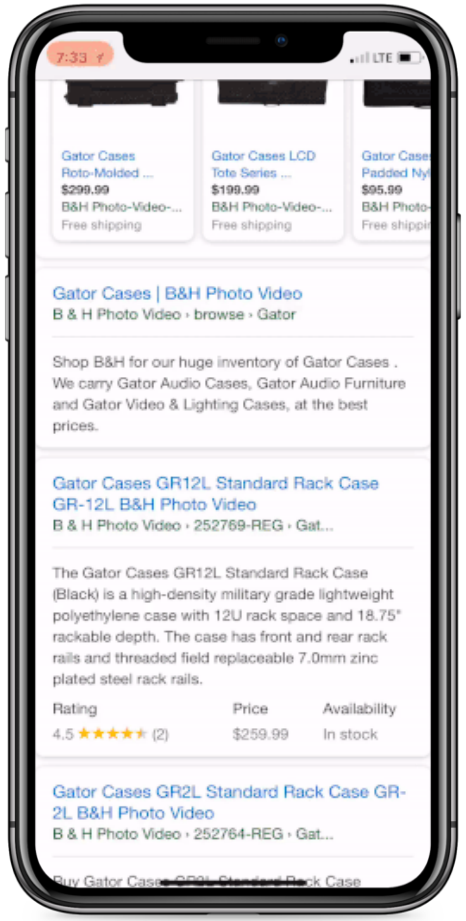
Engaging


Acquisition
Conversion
Retention

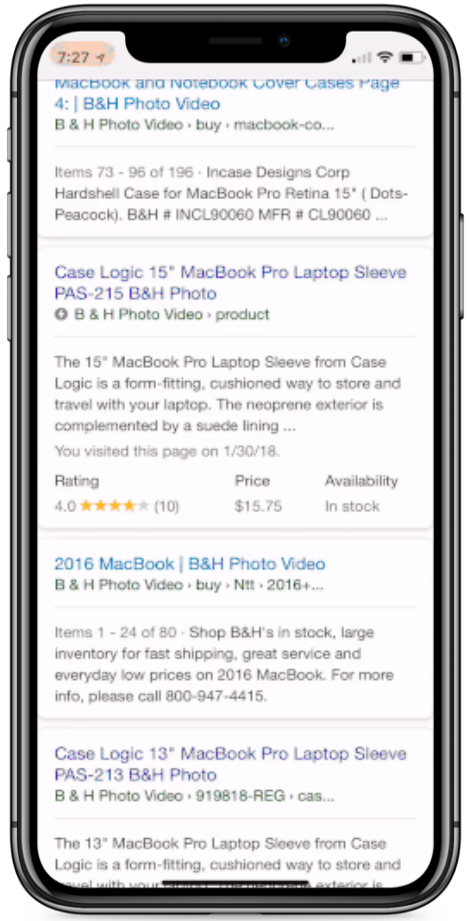

Acquisition
Conversion
Retention
AMP
PWA

Speed is the differentiator

Speed is the differentiator

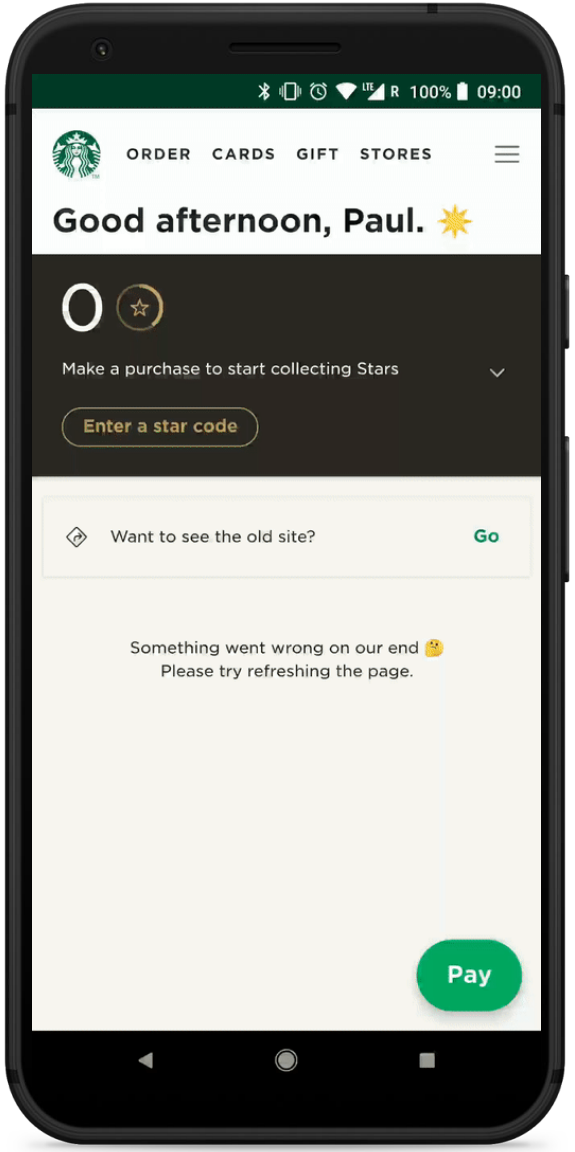


Non-AMP



AMP

Starbucks saw **2x daily & monthly active users** with PWA



Some features missing

AMP

Low-effort

Fast-loading

Out-of-the-box UX

First load not as fast

PWA

Advanced platform features

Fast-loading repeat visits

Reliability / Offline

~~Some features missing~~

~~First load not as fast~~

AMP + PWA

Low-effort

Fast-loading

Out-of-the-box UX

Advanced platform features

Fast-loading repeat visits

Reliability / Offline

Measurement & Attribution

Google Partners

Let’s think about Measurement

Full Funnel Measurement

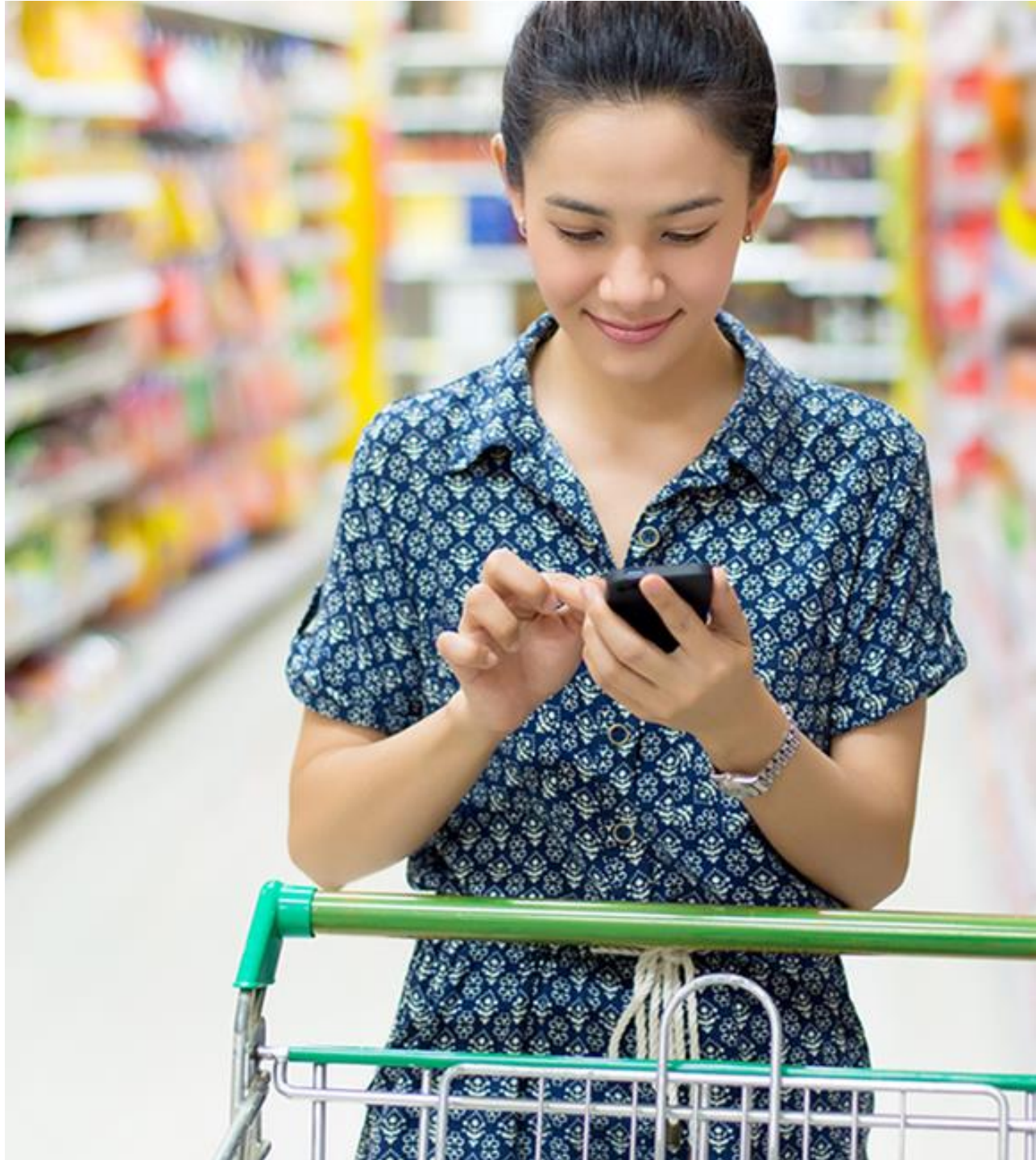
Last Click

Full Funnel Measurement

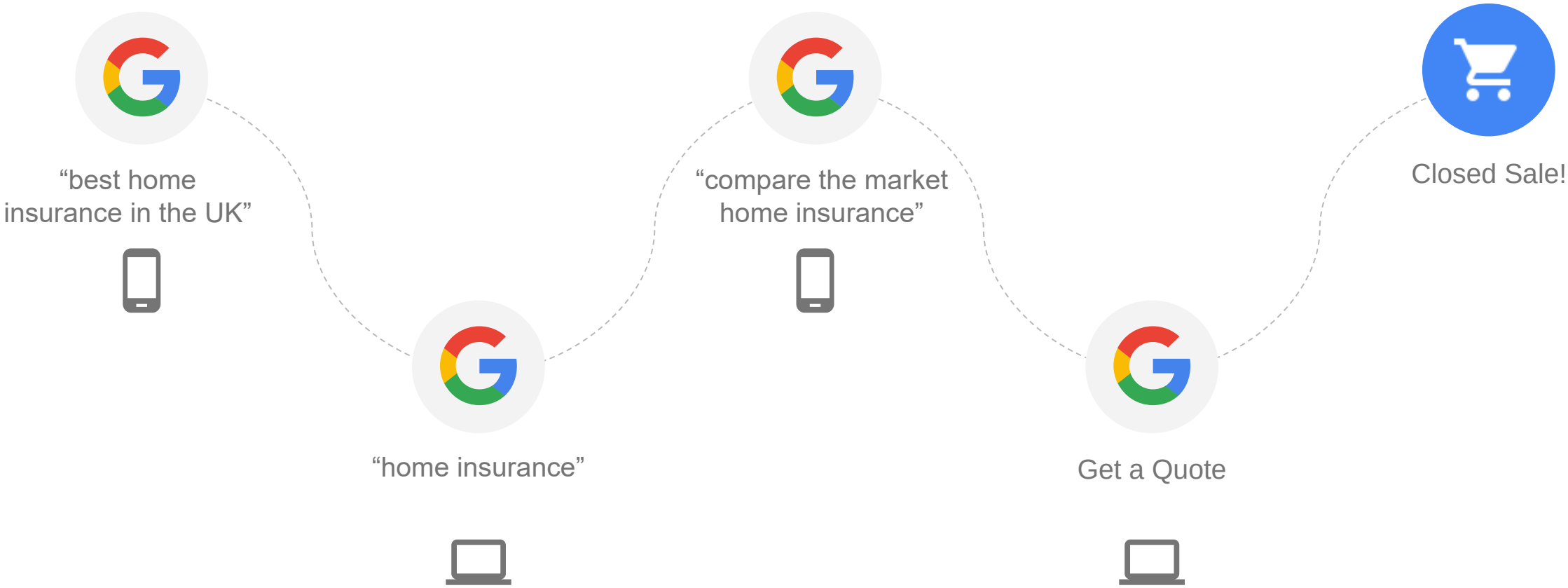
Last Click

We Need BOTH

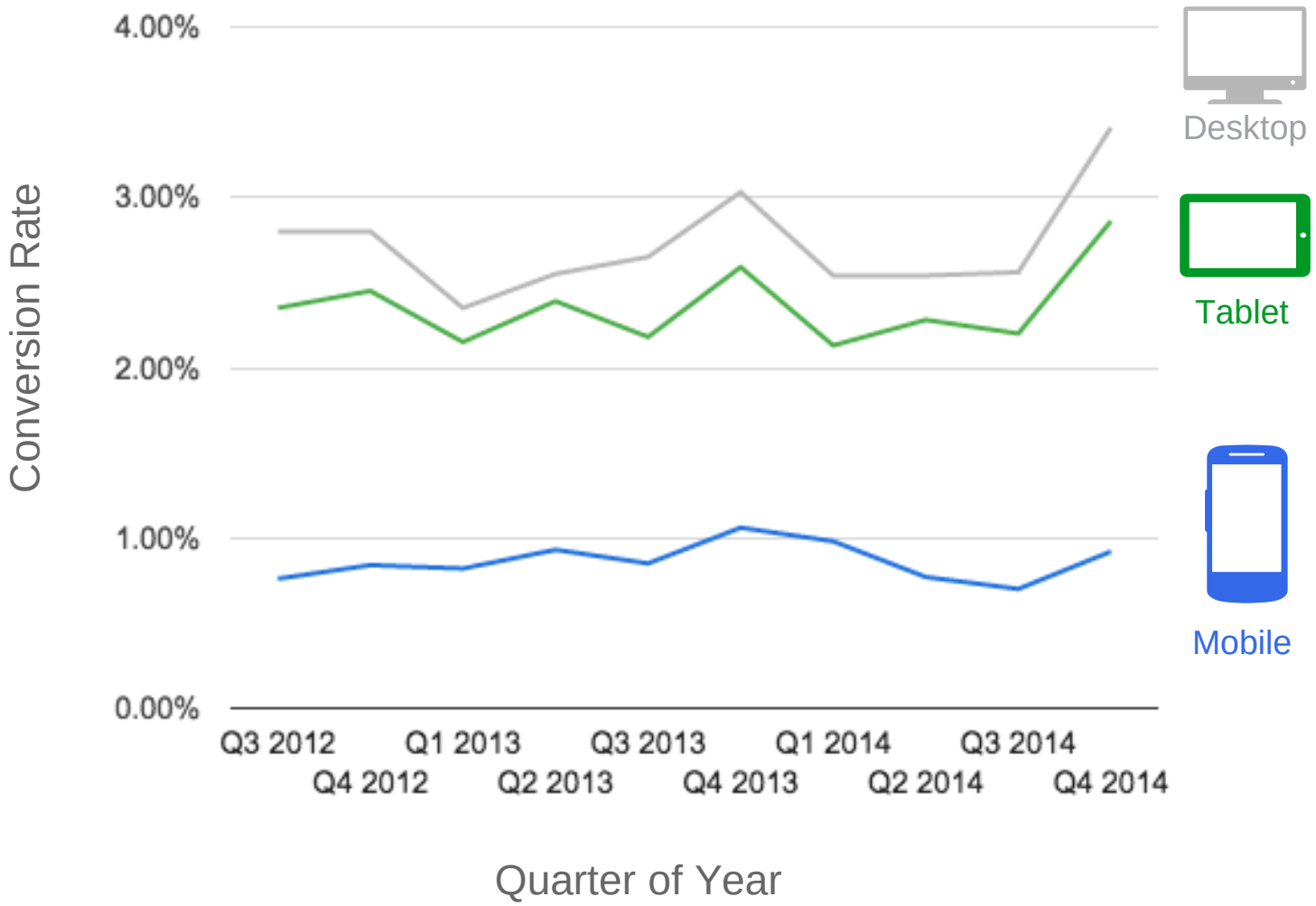
An attribution model is the rule, or set of rules, that determines how credit is assigned to touchpoints along the conversion path



Which interaction is responsible for the final purchase?



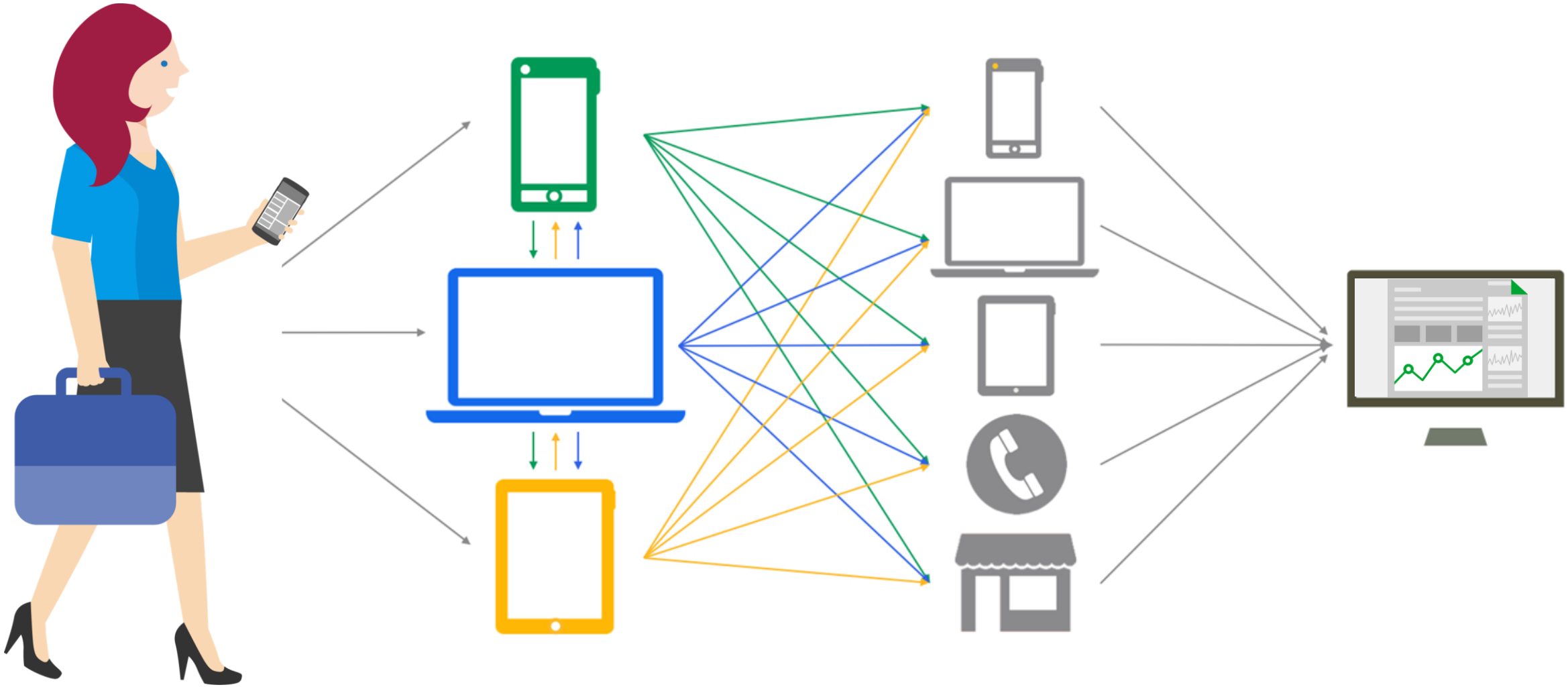
On Paper, Mobile Seems to be Underperforming



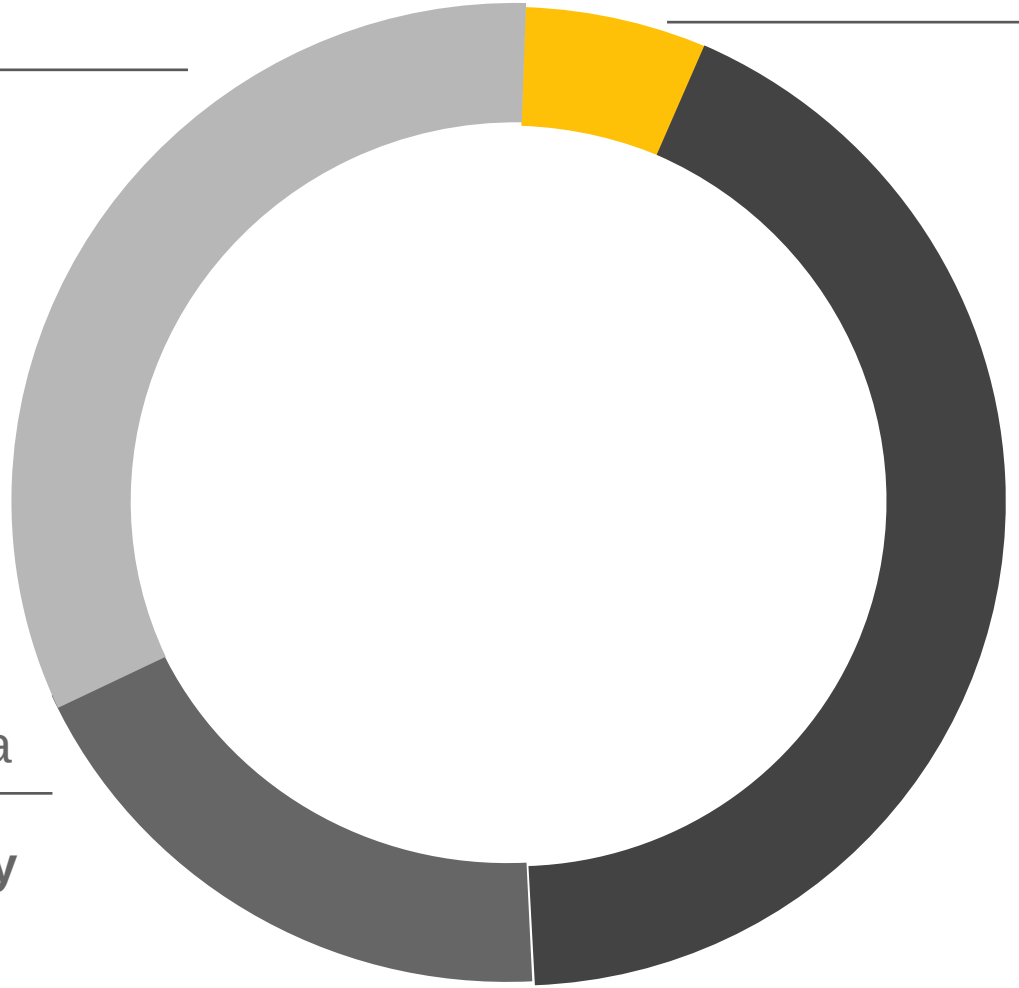
Source: Monetate Ecommerce Quarterly - http://www.monetate.com/resources/research/

Source: Google / Ipsos Connect, March 2016, GPS Omnibus, n=2,013 US online respondents 18+

Understanding Performance in a Multi-Device World is Complicated



Marketers Worldwide who have a single view of customers/prospects across devices and touchpoints



32%

We have **not yet implemented a solution** to achieve a single view of our customers

6%

Our current solution provides an **adequate single view** of our customers

19%

We have implemented a solution but its **shortcomings severely limit its practical effectiveness**

47%

We have a solution in place but it still has **gaps in coverage** of devices, touch-points and data

Source: Signal, “Preparing for Cross-Channel Success: Solving the Identity Puzzle” , March 2015

Cross-Device is ~~Not~~ For Everyone

Moving beyond cookies

User Log-In or *Deterministic*

Track users who **log-in to a service** on multiple devices

Statistical Linking or Probabilistic

Algos based **on non-PII public info** (e.g., device type, IP address) to approximate device links; *does not create persistent ID*

Fingerprinting

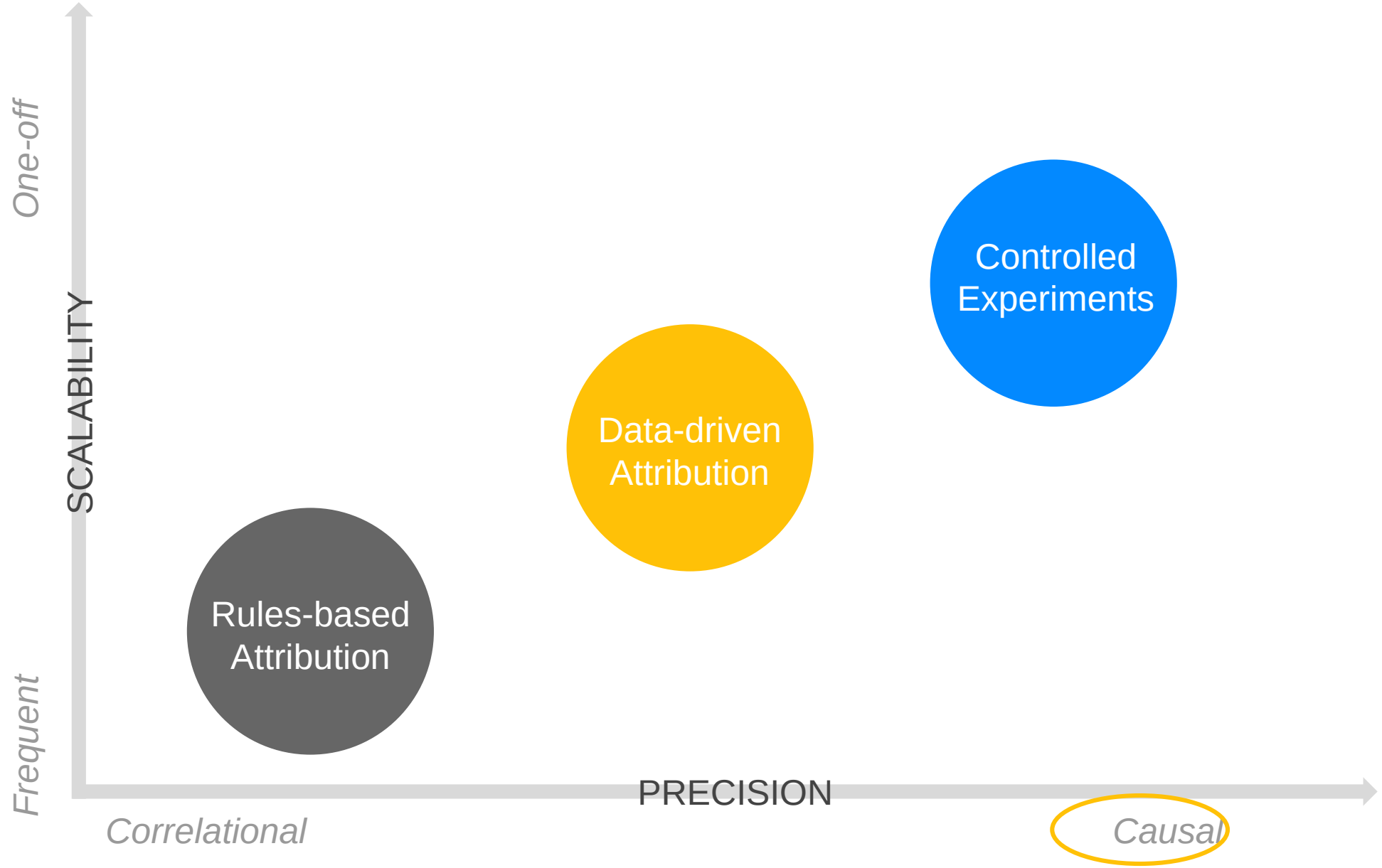
Uses identifiers that a **user cannot control or reset** - e.g., fonts, screen resolutions - to create a *persistent*, unique ID for that device

Last Click

Cross Device

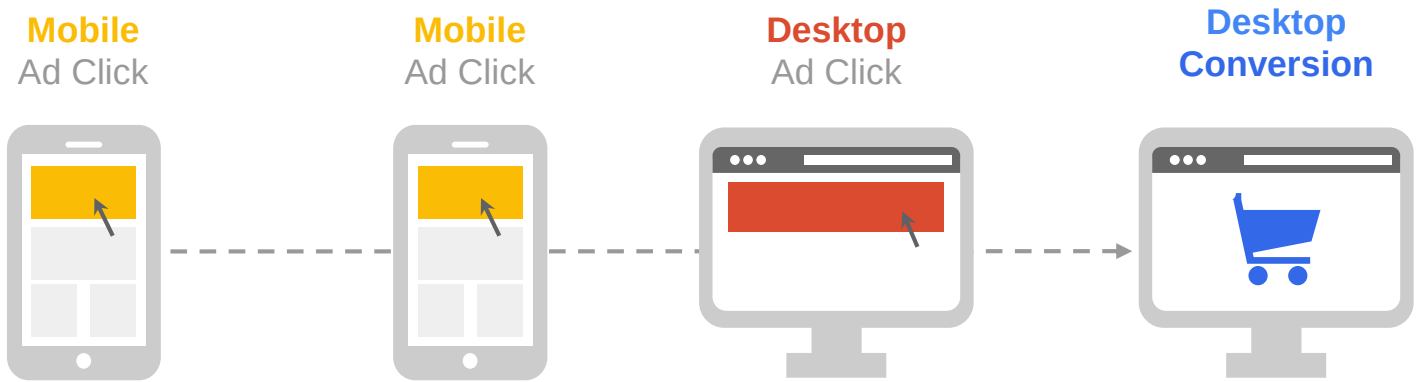
Attribution

Attribution



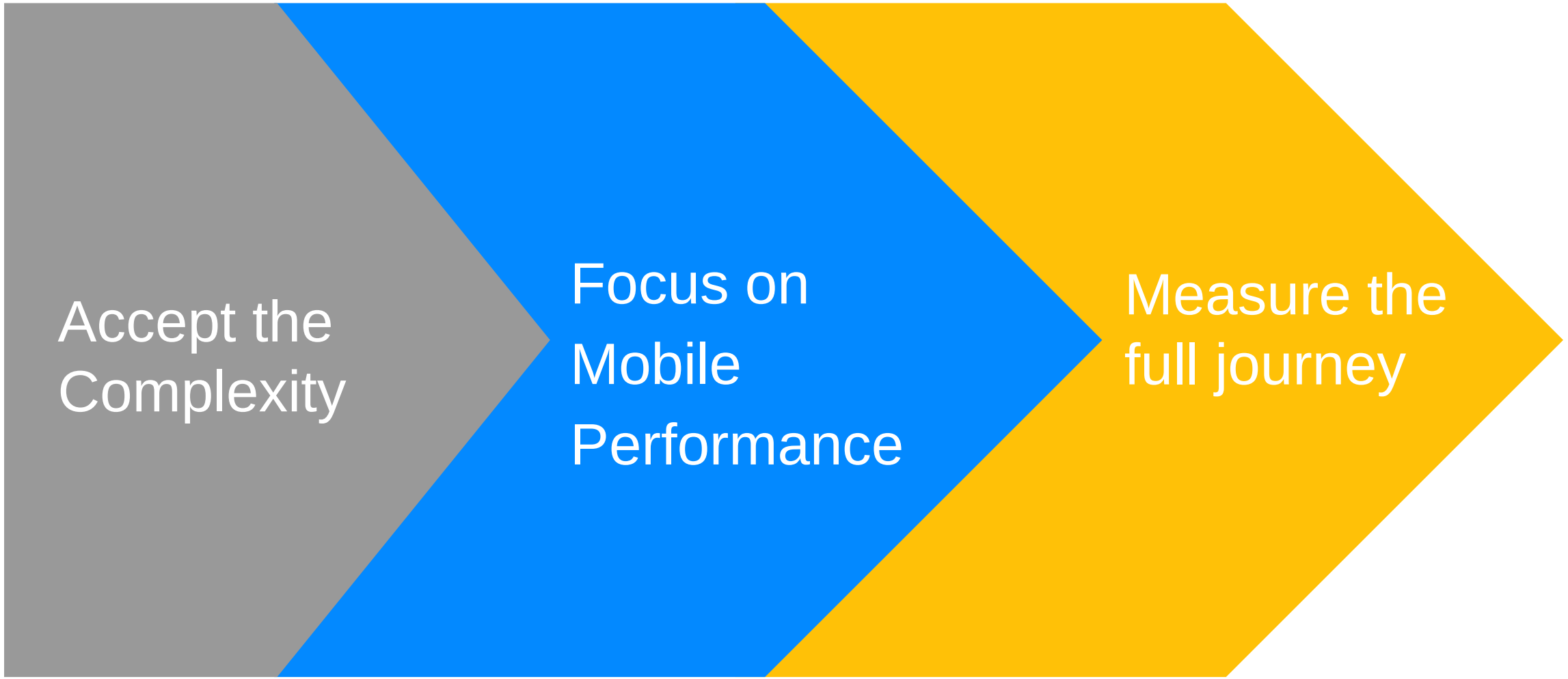
Data Driven Attribution

Path w/ Last Ad Click on Converting Device



Attribution Model	Mobile	Mobile	Desktop
Last Click Model DEFAULT TODAY	**0** *(Ignored)*	**0** *(Ignored)*	**1 Conversion**
Data Driven Attribution	**0.3 Conversion**	**0.1 Conversion**	**0.6 Conversion**

In Summary


Accept the Complexity
Focus on Mobile Performance
Measure the full journey

THANKS