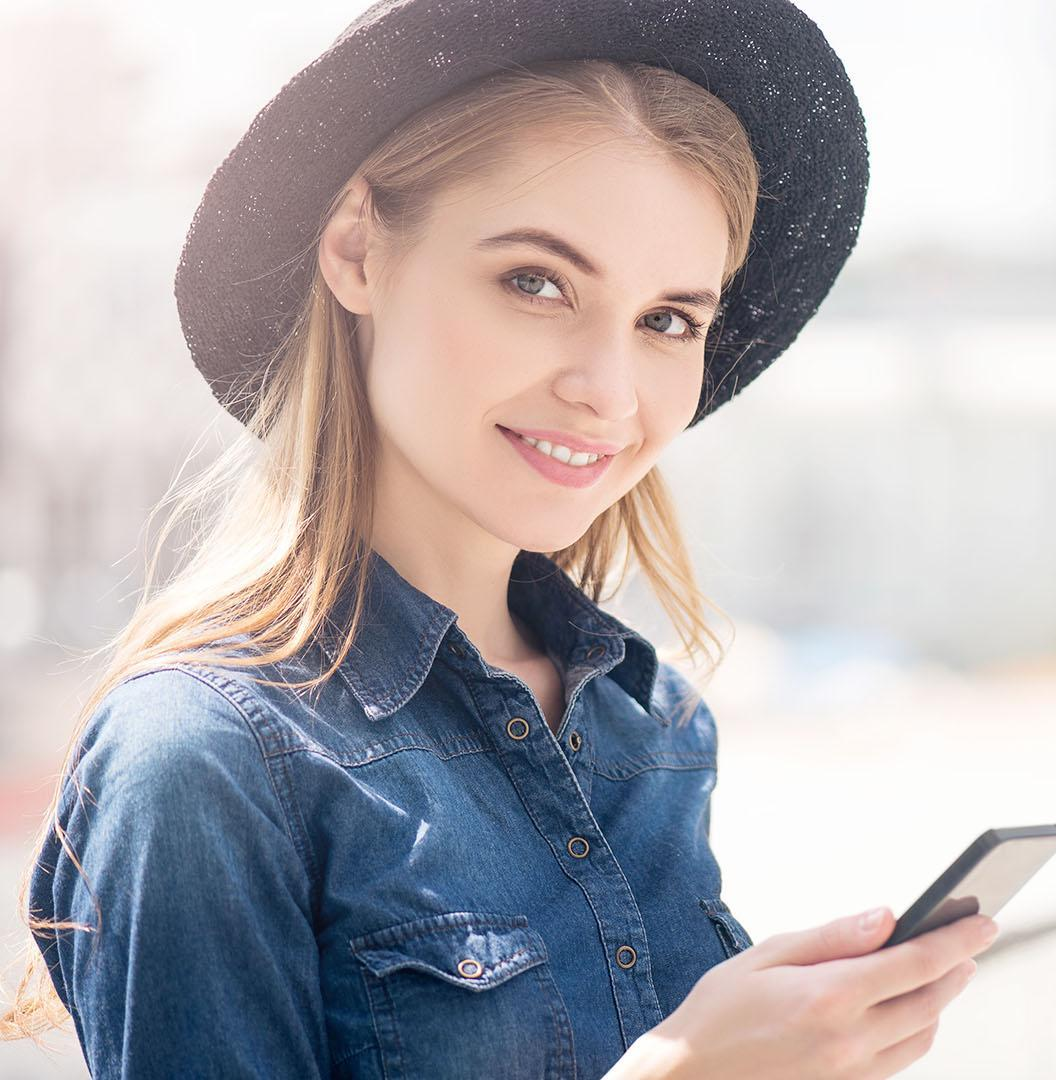




MASTERS OF MOBILE

Australia | New Zealand
Regional Report 2018



| Accenture Interactive

EXECUTIVE SUMMARY

Consumers have high expectations of mobile sites, which play a critical role in purchase decisions. 84% of Australian consumers conduct pre-purchase research on smartphones¹, and 65% of them will abandon a poorly designed mobile site for another that makes purchasing easy.²

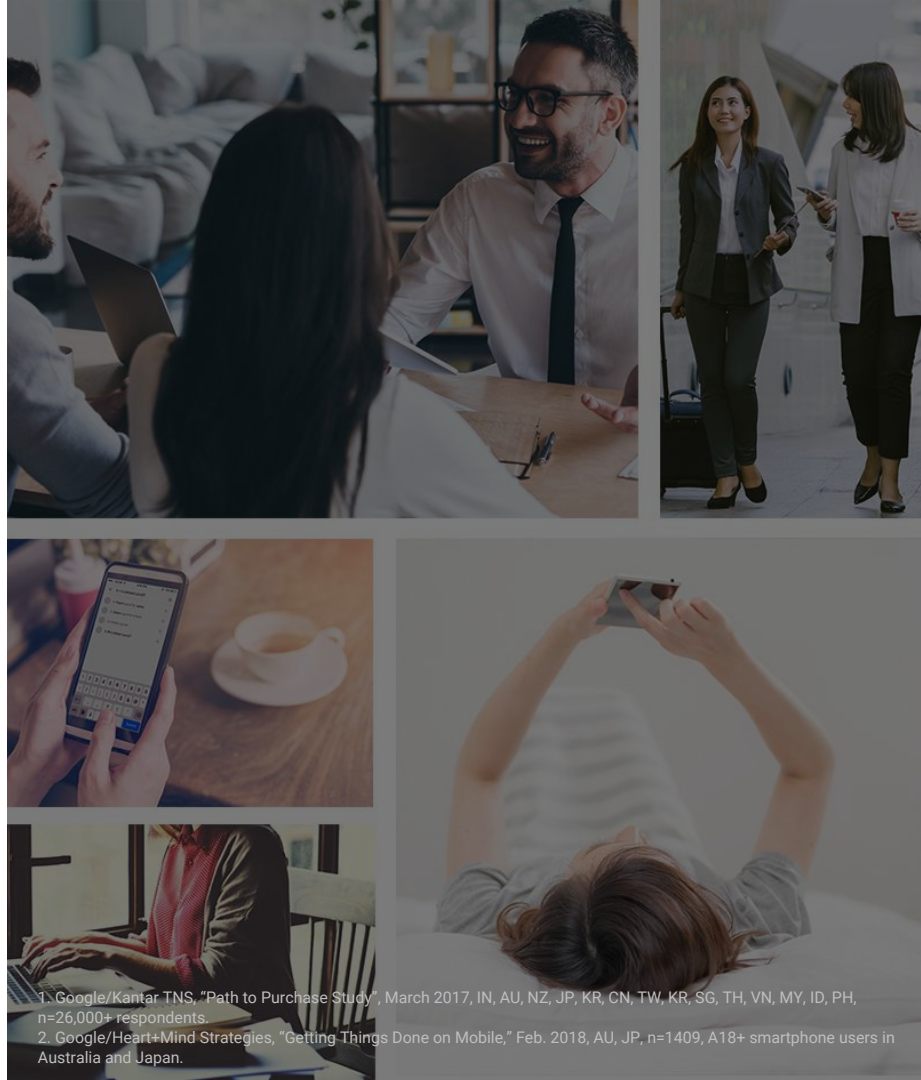
Google commissioned Accenture Interactive to benchmark the user experience of the highest-trafficked mobile sites in APAC.

The research assessed over 720 mobile sites across three industries – financial services, retail and commerce, and travel – in 15 countries across Asia Pacific.

There's a huge opportunity for breakout performance in Australia and New Zealand for brands that optimize their site speed.

Brands are rating high on 4 out of 5 key categories and the issue lies in slow mobile site speed – site speeds average 55%.

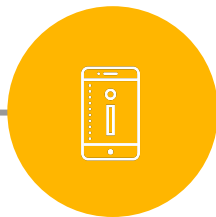
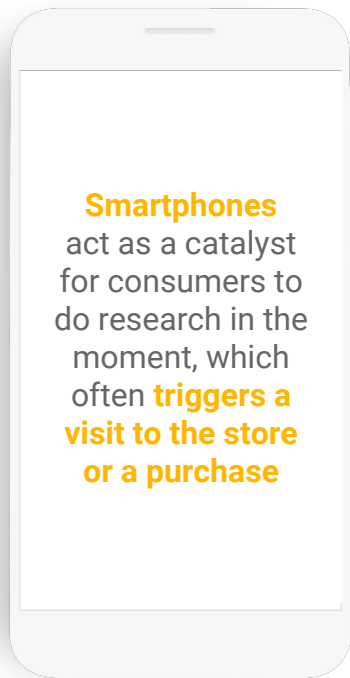
BankSA, The Warehouse and Viator top their industries as mobile masters in the region. This report celebrates the top five sites in each industry and showcases what they do as best practices.



1. Google/Kantar TNS, "Path to Purchase Study", March 2017, IN, AU, NZ, JP, KR, CN, TW, KR, SG, TH, VN, MY, ID, PH, n=26,000+ respondents.

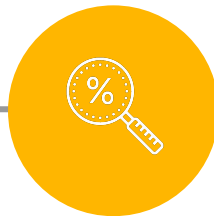
2. Google/Heart+Mind Strategies, "Getting Things Done on Mobile," Feb. 2018, AU, JP, n=1409, A18+ smartphone users in Australia and Japan.

MOBILE PLAYS A CRITICAL ROLE IN CONSUMERS' PURCHASE DECISIONS



84%

of consumers in Australia on average do pre-purchase research online using a smartphone



74%

of Australian consumers act on this search, often visiting a store or making a purchase



53%

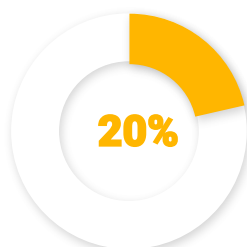
of Australian consumers will still look for information online, even at the point of sale in store.¹

AS A RESULT, CONSUMERS HAVE HIGH EXPECTATIONS FOR MOBILE SITES

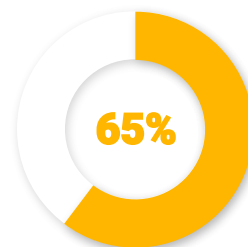
Brands that do not prioritise great mobile experience risk poor conversions.



of consumers will leave a mobile site that takes longer than **three seconds to load**



drop in conversions experienced for **every second of delay** in mobile page load time²



of Australian consumers will abandon a poorly designed mobile site for an alternative that **makes purchasing easy**³

WHY THIS RESEARCH?

To help brands elevate their mobile site experience, Google partnered with Accenture to seek out the top-performing mobile sites in financial services, retail and commerce, and travel across Asia Pacific and to celebrate what make these sites great.

SCALE OF THIS RESEARCH:



720+ mobile sites assessed



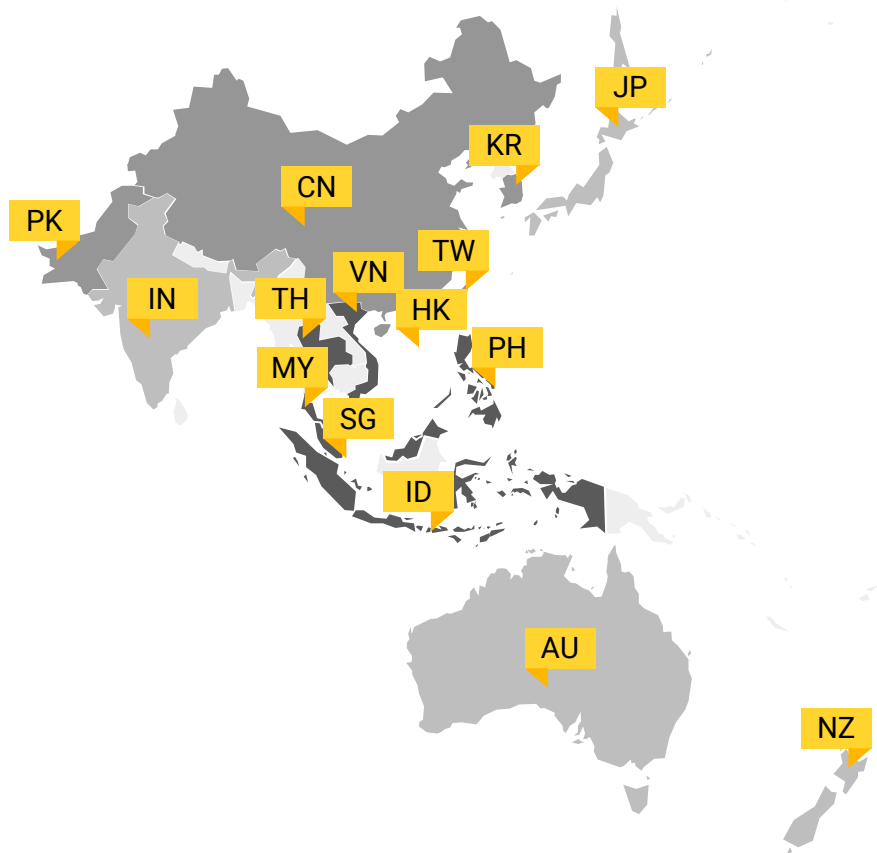
15 countries in **5** sub-regions covered



80 UX industry best practice guidelines used



45 specialists and engineers involved



WE EVALUATED 104 MOBILE SITES IN AUSTRALIA AND NEW ZEALAND



FINANCIAL SERVICES

36 mobile sites assessed

28 banks

4 insurers

4 trading firms | others



RETAIL AND COMMERCE

39 mobile sites assessed

33 e-commerce firms

6 retailers



TRAVEL

29 mobile sites assessed

15 airlines

7 hotels

7 travel aggregators | others



HERE'S HOW WE MEASURE A GREAT MOBILE EXPERIENCE

We define mobile experience score as the percentage of best practices passed in and weighted equally across the categories below. We hail sites as **Masters of Mobile** if they rank in the top 5 of their respective industries.

MOBILE EXPERIENCE SCORE



FINDABILITY*

Does the on-site search and relevant features (e.g. filter) help users quickly find the right product?



PRODUCT PAGES*

Is key written and visual product information presented clearly and consistently? Are there prominent calls to action?



REGISTRATION AND CONVERSION*

Are registration and payment forms easy to complete? Is the user offered simple, safe options to transact?



MOBILE DESIGN*

Are the site pages designed for mobile? Do they provide clear headings and well laid-out content? Is branding consistent?



SPEED**

Is the site performance optimised for mobile? Do pages load quickly enough to not disrupt the site experience?

* The first four mobile categories are assessed by UX specialists based in this region.

** Speed is measured through an automated process reviewed and managed by web speed performance engineers.

MEET THE MOBILE MASTERS

These are the top 5 brands that provide consumers in Australia and New Zealand with a great mobile experience



FINANCIAL SERVICES

1	BankSA	84%
2	ME Bank	84%
3	Westpac	81%
4	RACQ	81%
5	ANZ	81%

68%
Industry Average



RETAIL AND COMMERCE

1	The Warehouse	87%
2	Target	83%
3	PB Tech	80%
4	Banggood*	79%
5	David Jones	78%

71%
Industry Average



TRAVEL

1	Viator	85%
2	Singapore Airlines	85%
3	Hotels.com	84%
4	lastminute.com.au	83%
5	Booking.com	83%

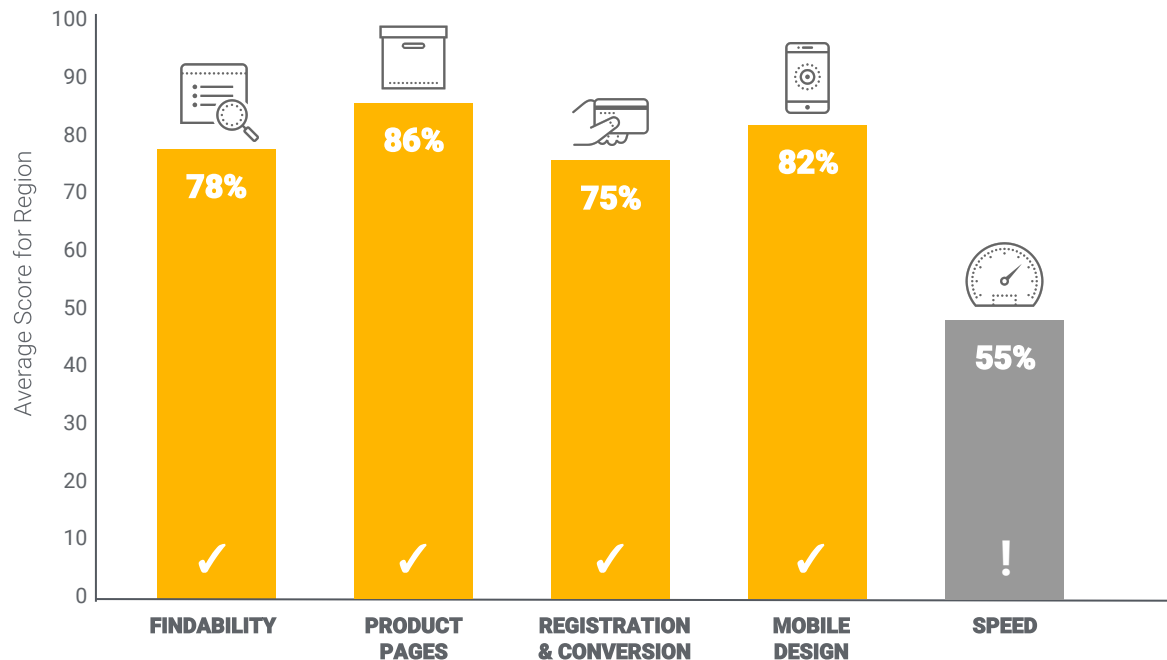
70%
Industry Average

REGION OVERVIEW

AUSTRALIA AND NEW ZEALAND

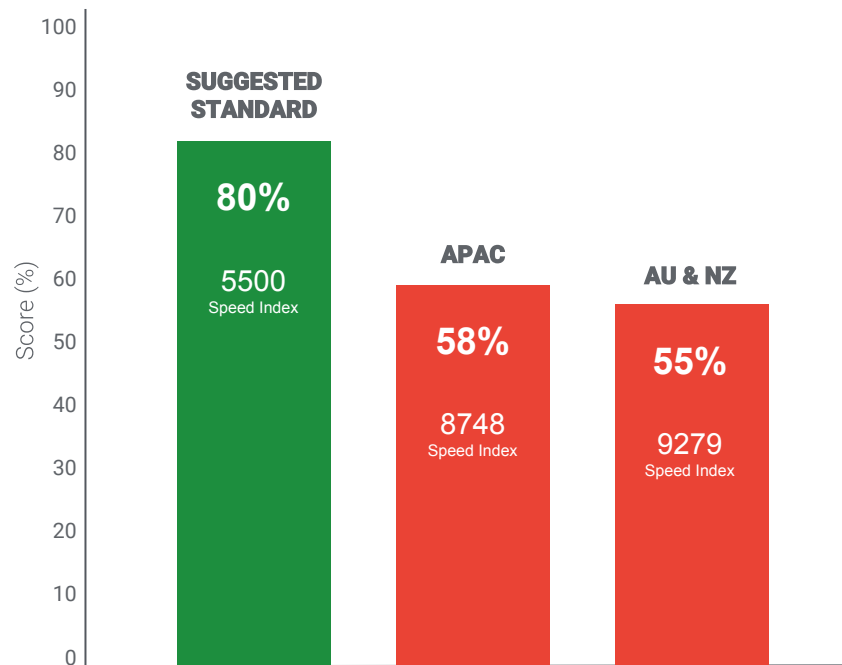
Mobile websites in this region score well in all categories except speed

Most mobile sites in this region **take too long to load** with a speed average of **55%**. On average, they score well in every other category.



LOOKING INTO SPEED

How speed scores in Australia and New Zealand compare to the APAC average and the suggested industry standard



What do these scores mean?

Percentage scores have been calculated by normalizing [Speed Index](#) measurements of all brands that are part of this study.

Speed Index (read in milliseconds) helps measure how visually available a particular page is to the customer when loaded. The lower the score, the faster the page is rendered and the content is visually made available to the customer, even if the rest of the page is not ready yet.

APAC LEGEND

- Good <5500 (>80%)
- Average 5500 - 8500 (60-80%)
- Poor >8500 (<60%)

HOW TO IMPROVE SPEED

Our top speed recommendations for Australia and New Zealand



94% of mobile sites surveyed can improve their speed this way:

Ensure textual and image contents are compressed

- Use gzip compression for transferring compressable responses
- Compress and pick the right settings for your images including format, quality and size and more
- Use Progressive JPEGs to improve perceived performance



72% of mobile sites surveyed can improve their speed this way:

Enable caching on the browser side

- All server responses should specify a caching policy to help the client determine if and when it can reuse a previously fetched response.



62% of mobile sites surveyed can improve their speed this way:

Identify and fix backend bottlenecks

- Inspect existing infrastructure using application performance management tools
- Fix performance bottlenecks
- Implement a monitoring solution to alert for any anomalies.

INDUSTRY INSIGHTS

FINANCIAL SERVICES



FINANCIAL SERVICES

MEET THE MOBILE MASTERS

Consumers increasingly expect mobile sites to be fast and easy to use. We reviewed the 36 most trafficked financial services websites in Australia and New Zealand for their user experience including speed, and list the top 5 scoring sites below.

1	BankSA	84%
2	ME Bank	84%
3	Westpac	81%
4	RACQ	81%
5	ANZ	81%
6 – 20 Average score of sites		74%
21–36 Average score of sites		58%

“ Every interaction we design starts on a mobile screen and adapts to a larger device. It forces us to question what’s important, what people really need to see, and how we can make it simpler. ”



Tony Jones, UX Lead at ME Bank

BEST IN CLASS: CATEGORY**



Findability – Top in class (100%)

ASB Bank, BankSA, Bankwest, ME Bank and Westpac



Product pages – Top in class (100%)

ANZ, BankSA, Bankwest, BNZ, Latitude Financial, ME Bank, and Westpac



Registration and conversion – Top in class (100%)

Latitude



Mobile design – Top in class (92%)

BankSA, BNZ, ME Bank, RACQ

** Individual speed ranks are omitted in this report as poorly designed sites can load very quickly. For this report, speed should be considered a function of overall user experience.

HERE'S HOW THE MOBILE MASTERS DO IT

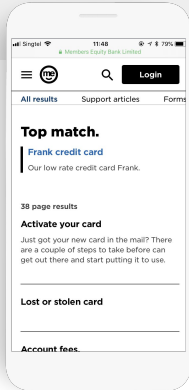


Take a look at how the leading financial services firms in your region are doing so well



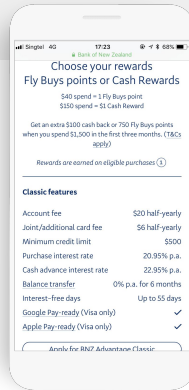
FINDABILITY

ME Bank's on-site search experience is top-notch—search is always easy to find and results are organised and easily scannable.



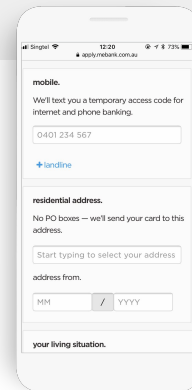
PRODUCT PAGES

On BNZ's, skimming complex products is a breeze when important information and benefits are presented clearly and consistently.



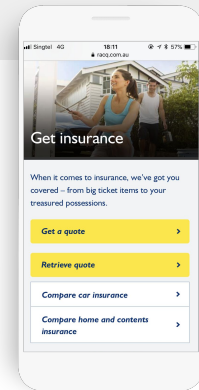
REGISTRATION AND CONVERSION

ME Bank's application forms are simple, only ask for what is needed, give clear instructions and reasons for requesting private information.



MOBILE DESIGN

RACQ showcases good mobile business site design by having clear headings, a clean layout and serving all pages over HTTPS.



HOW TO BE A MOBILE MASTER



Our top recommendations for financial service sites for your region



75% of sites surveyed can improve **registration and conversion** this way:

Ensure that input boxes in forms are correctly tagged for autofill

Form entry is generally more troublesome and inconvenient on a mobile device. By not implementing autofill or doing it incorrectly, sites increase the hassle and inconvenience for users and create barriers to conversion.



61% of sites surveyed can improve **findability** this way:

Use autocomplete to suggest popular searches

New visitors may not always know what the most appropriate search terms are or how the site is organised, so autocomplete provides valuable assistance. Typing is also error-prone on mobiles and autocomplete helps mitigate this, saving valuable time.



42% of sites surveyed can improve **registration and conversion** this way:

Provide responsive support in application forms

Applications and conversions are when support is often the most critical, particularly with complex financial services. Not having responsive support available means that users have to leave the conversion process and spend additional effort getting help.

INDUSTRY INSIGHTS

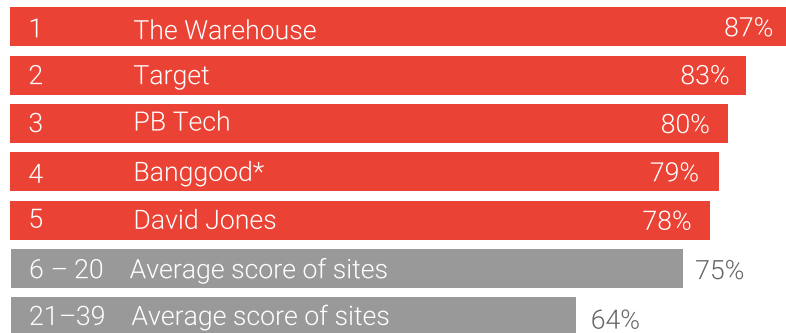
RETAIL & COMMERCE



RETAIL & COMMERCE

MEET THE MOBILE MASTERS

Consumers increasingly expect mobile sites to be fast and easy to use. We reviewed the 39 most trafficked retail and commerce websites in Australia and New Zealand for their user experience including speed, and list the top 5 scoring sites below.



“

Our top-rated mobile app and made-for-mobile sites are part of our relentless focus to deliver the best version of The Warehouse to our customers, so no matter where they live, they can easily access the quality products they need at our everyday low prices. Mobile is now an essential platform, both for instore and distance shopping, and ease of use and great functionality are key to positive customer experiences. ”



Jonathan Waecher, CMO at The WareHouse Group

BEST IN CLASS: CATEGORY**



Findability – Top in class (94%)
Target



Product pages – Top in class (93%)
Banggood, Etsy, Target



Registration and conversion – Top in class (95%)
Target and The Warehouse



Mobile design – Top in class (100%)
The Warehouse

* For these global brands, scores (with the exception of speed) were taken from reviews conducted in another country.

** Individual speed ranks are omitted in this report as poorly designed sites can load very quickly. For this report, speed should be considered a function of overall user experience.

HERE'S HOW THE MOBILE MASTERS DO IT

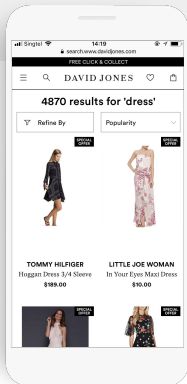


Take a look at how the leading retail & commerce brands in your region are doing so well



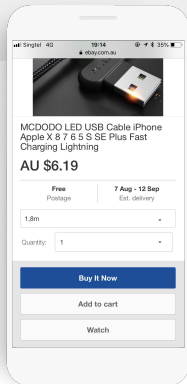
FINDABILITY

Search results on David Jones are nice to skim, with high-quality images to showcase products. Search filters are also easy to use.



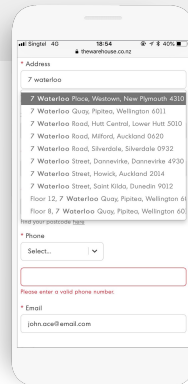
PRODUCT PAGES

eBay's product pages make it easy for customers to make quick decisions, with essential information upfront and prominent calls-to-action.



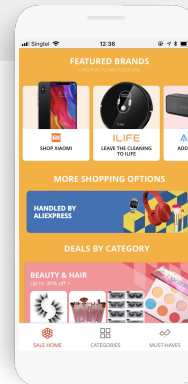
REGISTRATION AND CONVERSION

The Warehouse's checkout process makes filling out mobile forms quicker by providing address suggestions and real-time feedback for errors.



MOBILE DESIGN

AliExpress' mobile site uses quality graphics and crisp formatting. The result is no visual clutter, despite the amount of information on the page.



HOW TO BE A MOBILE MASTER



Our top recommendations for retail & commerce sites across your region



88% of sites surveyed can improve **product pages** this way:

Allow users to save products to a guest wishlist

On sites with a wide selection of products, guest wishlists prevent choice paralysis by letting users narrow down to and compare a select few. Not having a guest wishlist is a missed opportunity to help users along their purchase journey.



56% of sites surveyed can improve **registration and conversion** this way:

Showcase the tangible benefits of creating an account

There's no shortage of account benefits for most retail sites. But not making potential members aware of these means that new users may miss out on why they should take the additional steps to create an account, losing many sites an opportunity to convert.



41% of sites surveyed can improve **product pages** this way:

Let users customise product options within the same page

Allowing users to choose colours and customise products is part of the fun and personalisation of a shopping journey. But forcing users to leave a page to do so makes this a hassle and can also leave users unaware of the variety of choices available.

INDUSTRY INSIGHTS

TRAVEL



TRAVEL

MEET THE MOBILE MASTERS

Consumers increasingly expect mobile sites to be fast and easy to use. We reviewed the 29 most trafficked travel websites in Australia and New Zealand for their user experience including speed, and list the top 5 scoring sites below.

1	Viator	85%
2	Singapore Airlines*	85%
3	Hotels.com	84%
4	lastminute.com.au	83%
5	Booking.com	83%
6 – 20	Average score of sites	72%
21–29	Average score of sites	57%

“ We understand that a complete mobile experience is very important to travelers and that's why we are aggressively investing in innovation and an optimized product for our mobile-savvy customers. ”



Murari Gopalan, VP Marketing at Expedia
(parent of lastminute.com.au & Wotif)

BEST IN CLASS: CATEGORY**



Findability – Top score (95%)
Hotels.com and Wotif



Product pages – Top score (100%)
Singapore Airlines and Wotif



Registration and conversion – Top score (100%)
Singapore Airlines



Mobile design – Top score (100%)
Air New Zealand and Flight Centre

* For these global brands, scores (with the exception of speed) were taken from reviews conducted in another country.

** Individual speed ranks are omitted in this report as poorly designed sites can load very quickly. For this report, speed should be considered a function of overall user experience.

HERE'S HOW THE MOBILE MASTERS DO IT

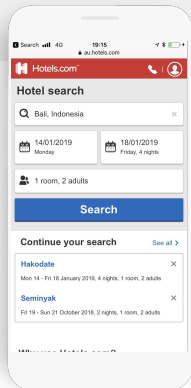


Take a look at how the leading travel brands in your region are doing so well



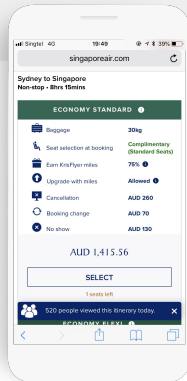
FINDABILITY

Hotels.com saves previous searches for return visitors and provides smart search suggestions based on country or city.



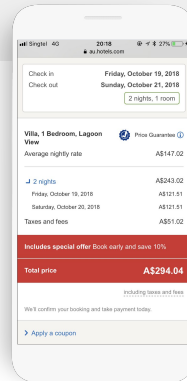
PRODUCT PAGES

Singapore Airlines drives faster conversions by making it easy to compare tickets and emphasising when a trip is in high demand.



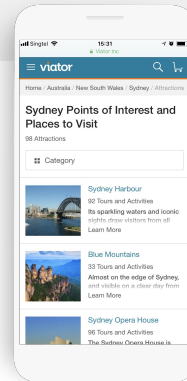
REGISTRATION AND CONVERSION

Hotels.com doesn't hide costs and lets users know when they are paying, so customers can book with confidence and without unpleasant surprises.



MOBILE DESIGN

Viator's pleasant-to-use and clean design has clear headings, no visual clutter and consistent branding between desktop and mobile.



HOW TO BE A MOBILE MASTER



Our top recommendations for travel sites across your region



59% of sites can improve **findability** this way:

Use visible spell-correct in site searches

It's easy to make spelling mistakes on smartphone keyboards. Not providing automatic and visible spell-correct means that potential customers may not realise what happened and how to fix the issue if the system is giving them unexpected search results.



52% of sites can improve **registration and conversion** this way:

Provide simplified payment options at checkout

For users, manually filling in their credit card and billing information can be an error-prone hassle. Simplified payment options (credit card autofill, fast and trusted third party checkouts, card scanning technology) help everyone shorten that final conversion process.



38% of sites can improve **registration and conversion** this way:

Clearly highlight mistakes in booking forms in real time

Form entry mistakes are unavoidable on smartphones—not highlighting errors to users in real time adds the friction of only discovering and having to search for errors when users try to proceed with the next stage in their booking or checkout.

WHAT'S NEXT?



UNCOVER CUSTOMER INSIGHTS

Identify areas where customers typically drop off on their user journey through quantitative analyses like web analytics reports and qualitative analyses.

Engage in user testing to understand common customer pain points within the five user experience categories.



DESIGN AND IMPLEMENT SOLUTIONS

Set goals and prioritize fixing these gaps in your user experience.

Identify solutions to help you get started. The [Web Fundamentals](#) site is a great place for usability inspiration, the latest tools and technologies and guidance on how you can leverage them to solve customer pain points.



TEST AND LEARN

Commit to continuous testing and improvements to your website. Delighting your users with great user experience is never a one-off process!

Monitor your mobile site's speed regularly with Webpagetest or through your analytics reports.

APPENDIX

METHODOLOGY

CUSTOM USABILITY HEURISTICS

We developed a custom set of best practices for this evaluation. These were originally derived from a large scale mobile website usability evaluation led by Jenny Gove for Google in 2014.⁴ Over the last four years, these have been updated to reflect changing best practices and to include specific customisations for retail, travel and financial websites. In addition, the version used for this study has customised guidelines specific to the APAC region, which has unique regional cultural variations for usability. Usability scores for Findability, Product Pages, Registration & Conversion, and Mobile Design are displayed using the mean.

USER STORY TO REVIEW

An user story was provided to help users assess the site from the customer's perspective, detailing:

- A core task for the user to complete
- The reason for performing that task
- The wider context for the task

SPEED METRICS

WebPageTest was used to conduct synthetic tests of website speed on emulated mobile network conditions. The metric "[Speed Index](#)" was selected to determine the brand's performance score. Once WebPageTest gathered the the speed index measurements for your website, a scoring logic converts the speed index into a speed score between 0 and 100 which is normalised against APAC region. The score is calculated for 4 key pages for a particular website (which includes the homepage, search page, product detail and registration/signup page). As speed metrics tend to be skewed, Speed Index scores are displayed using the median.

BRAND SELECTION

We selected the highest trafficked sites in each country up to 27th December 2017 ([SimilarWeb](#)) To qualify for inclusion, websites needed to:

1. Be a B2C site
2. Be a transactional site (i.e. possible for the user to complete a conversion/financial quotation journey online on that site).

BRAND EXCLUSION

Some recognised brands may be missing from this study because they did not meet the criteria for inclusion. Examples include:

1. Sites which only drive conversions offline through a phone call or visit to store/branch
2. Sites that redirect to another brand that is already included
3. Meta-search engines which drive conversions on other sites
4. Branding or informational sites without conversion journeys
5. Local transit sites for commuters and government service websites
6. Cryptocurrency websites
7. Telecommunications brands that only sell contracts.

DATES OF ASSESSMENT

Usability reviews for your region were conducted between April 25 - August 13, 2018. Speed measurements were conducted between May 28 - June 9, 2018.

APPENDIX: COUNTRY BENCHMARK

MOBILE MASTERS: AUSTRALIA



FINANCIAL SERVICES

1	BankSA	84%
2	ME Bank	84%
3	Westpac	81%
4	RACQ	81%
5	Bankwest	78%

68%
Industry Average



RETAIL AND COMMERCE

1	Target	83%
2	Banggood*	79%
3	Etsy	78%
4	eBay	78%
5	David Jones	77%

69%
Industry Average



TRAVEL

1	Viator	85%
2	Singapore Airlines	85%
3	Hotels.com	84%
4	lastminute.com	83%
5	Booking.com	83%

69%
Industry Average

APPENDIX: COUNTRY BENCHMARK

MOBILE MASTERS: NEW ZEALAND



FINANCIAL SERVICES

1	ANZ	81%
2	BNZ	79%
3	ASB	79%

68%
Industry Average



RETAIL AND COMMERCE

1	The Warehouse	87%
2	Apple	80%
3	PB Tech	80%

76%
Industry Average



TRAVEL

1	Expedia*	88%
2	Wotif	85%
3	Hotels.com	84%

73%
Industry Average

REFERENCES

1. Google/Kantar TNS (2017, March). Path to Purchase Study. IN, AU, NZ, JP, KR, CN, TW, KR, SG, TH, VN, MY, ID, PH, n=26,000+ respondents.
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3. Google Research (2018, Jan). Webpagetest.org, sampled 11M global mWeb domains loaded using a globally representative 4G connection.
4. Gove, J. (2014, June 27). Google I/O 2014 - Design principles for a better mobile web. Google. <https://www.google.com/events/io/io14videos/95a7ccd2-38bf-e311-b297-00155d5066d7>