

# MASTERS OF MOBILE

Japan Report  
2018

# EXECUTIVE SUMMARY

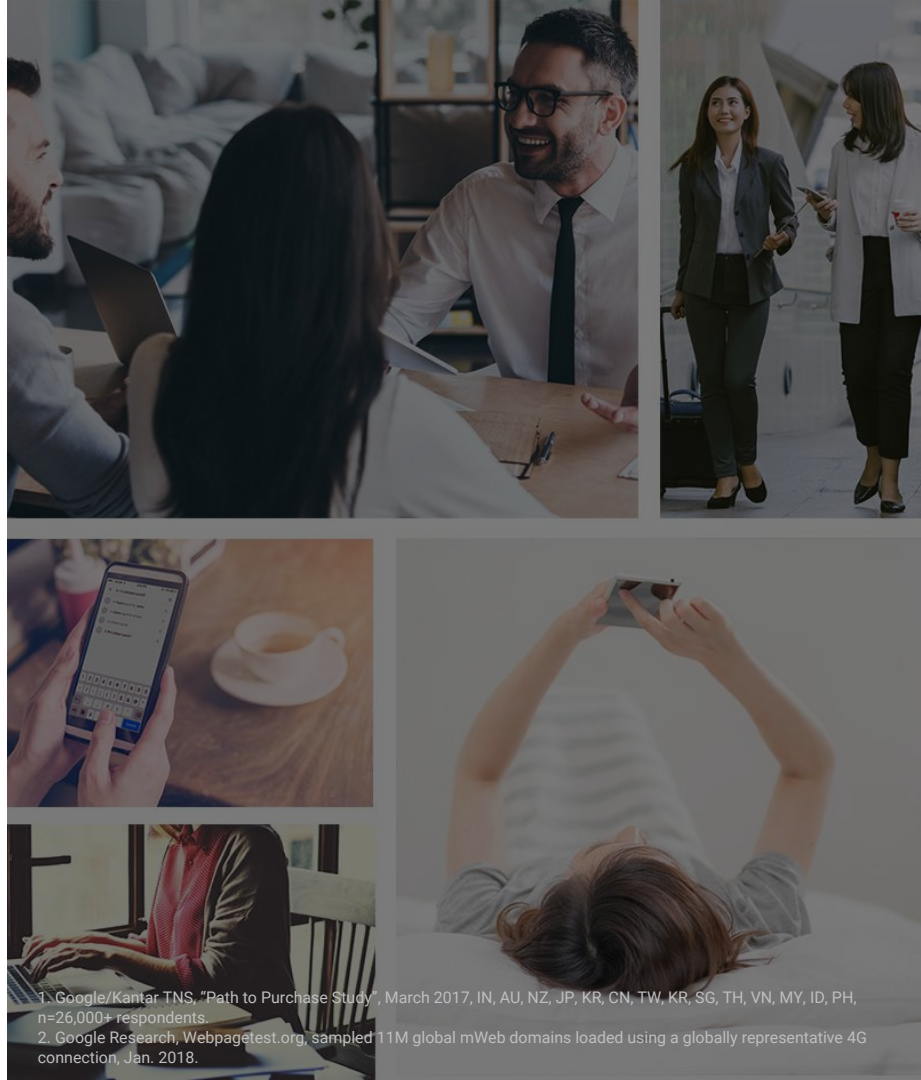
**Consumers have high expectations of mobile sites, which play a critical role in their purchase decisions.** 65% of Japanese consumers conduct pre-purchase research on smartphones<sup>1</sup>, and 54% of them will abandon a poorly designed mobile site for another that makes purchasing easy.<sup>2</sup>

**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 Japan for brands that optimize their site speed.** Mobile site speed is an issue in the region – most sites score below 50%, with the majority of sites taking too long to load.

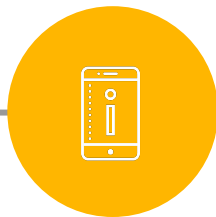
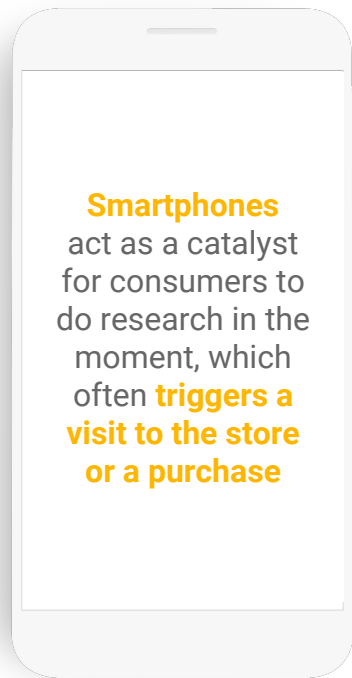
**Monex Securities, Amazon and Hotels.com top their industries as mobile masters.** This report celebrates the top ten sites in each industry and showcases what they do as best practices.



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.

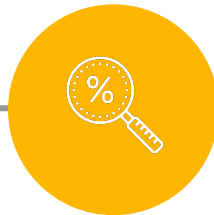
2. Google Research, Webpagetest.org, sampled 11M global mWeb domains loaded using a globally representative 4G connection, Jan. 2018.

# MOBILE PLAYS A CRITICAL ROLE IN CONSUMERS' PURCHASE DECISIONS



**65%**

of consumers in Japan on average do pre-purchase research online



**59%**

of Japanese consumers who purchase online make their purchases from retailers' websites

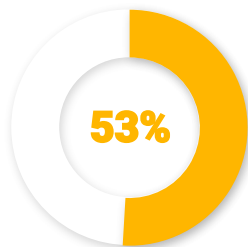


**53%**

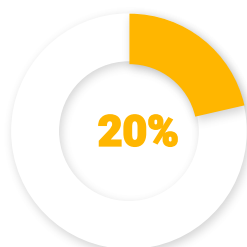
of Japanese consumers still look for information online, even at the point of sale in store.<sup>1</sup>

# 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 time<sup>2</sup>



of Japanese consumers will abandon a poorly designed mobile site for an alternative that **makes purchasing easy**<sup>3</sup>

# WHY THIS RESEARCH?

To help brands elevate their mobile site experience, Google commissioned Accenture Interactive 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



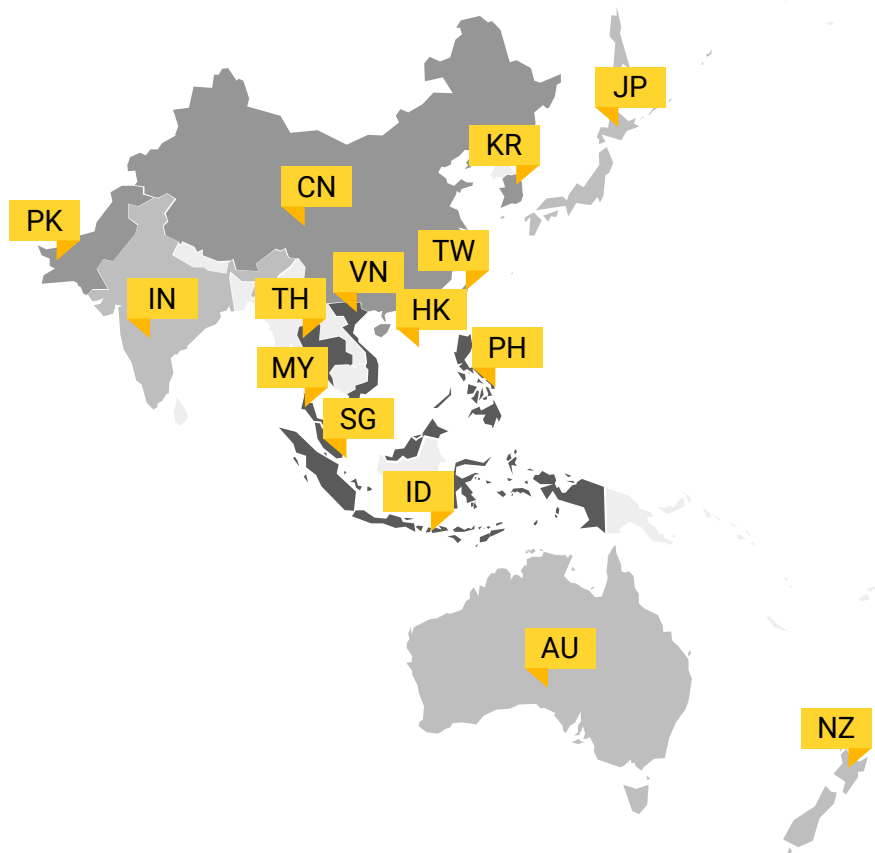
**15** countries in **5** sub-regions covered



**80** UX industry best practice guidelines used



**45** specialists and engineers involved



# WE EVALUATED 197 MOBILE SITES IN JAPAN



## FINANCIAL SERVICES

**64 mobile sites assessed**

- 22 banks
- 19 trading firms
- 13 credit card companies
- 7 insurance firms
- 3 comparison | others



## RETAIL AND COMMERCE

**79 mobile sites assessed**

- 58 e-commerce firms
- 21 retailers



## TRAVEL

**54 mobile sites assessed**

- 25 travel aggregators
- 14 hotels
- 8 airlines
- 7 bus | train sites





# 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 Japan with a great mobile experience



## FINANCIAL SERVICES

1	Monex Securities	88%
2	Saison Card	87%
3	Matsui Securities	85%
4	Idemitsu Card	85%
5	Daiwa Securities	85%

**69%**  
Industry Average



## RETAIL AND COMMERCE

1	Amazon	83%
2	Sanrio	83%
3	ToysRUs	82%
4	Softbank	81%
5	YAHUOKU!	81%

**67%**  
Industry Average



## TRAVEL

1	Hotels.com	83%
2	Toyoko-inn	82%
3	Expedia	81%
4	Tripadvisor	80%
5	Jalan	79%

**68%**  
Industry Average

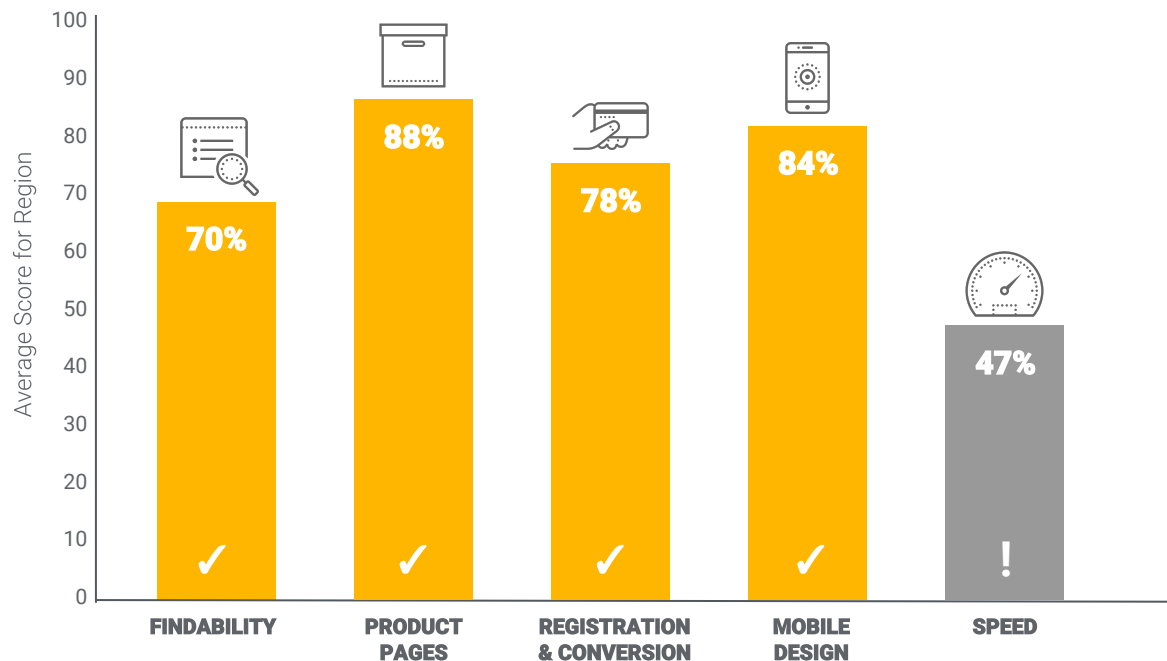


# REGION OVERVIEW

## JAPAN

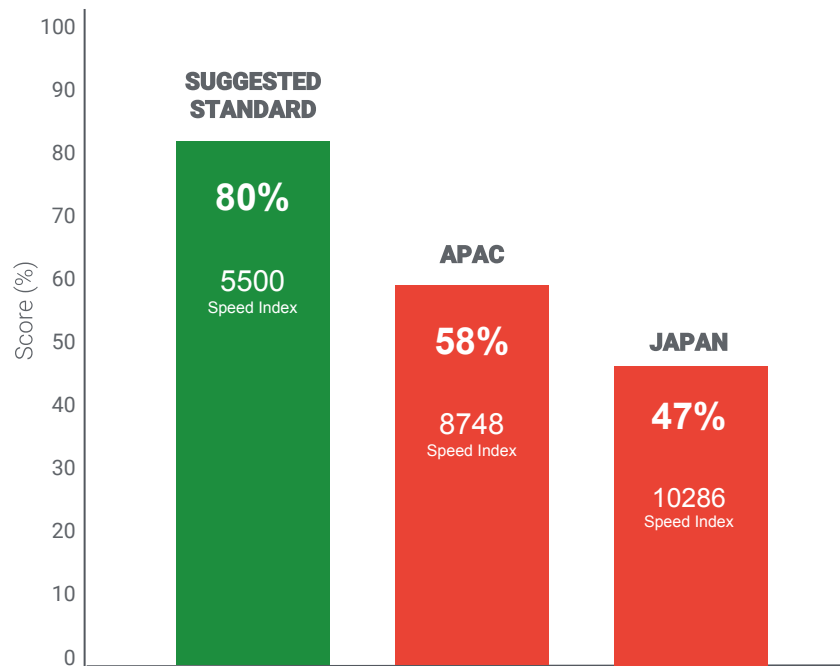
Mobile websites in this region score well in all categories except speed

Most mobile sites in this region **take too long to load** with a speed average of **47%**, the lowest in the Asia-Pacific region. On average, they score well in every other category.



# LOOKING INTO SPEED

How speed scores in Japan 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 Japan



**90%** of Japanese brands can improve speed by **compressing their content**

## 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, even on slower connections



**69%** of Japanese brands can improve **server response time**

## Identify and fix backend performance bottlenecks

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



**63%** of Japanese brands can improve speed by **caching content on the user's browser**

## 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.

# 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 64 most trafficked financial services websites in Japan for their user experience including speed, and list the top 10 scoring sites below.

1	Monex Securities	88%
2	Saison Card	87%
3	Matsui Securities	85%
4	Idemitsu Card	85%
5	Daiwa Securities	85%
6	Aeon	82%
7	Lake ALSA	82%
8	Cedyna	82%
9	Aflac	81%
10	Sumitomo Mitsui Card	81%
11 – 30 Average score of sites		77%
31 – 64 Average score of sites		60%

“ The fact that customers are increasingly engaging with businesses primarily through mobile is no exception for our company. Page speed was especially important to us. For this reason, we tried AMP on some mobile pages. We achieved great results after the release and look forward to expanding the scope of AMP Pages in the future. ”



Fumiya Sasaki, Head of Integrated Marketing Department,  
Sumitomo Mitsui Card

### BEST IN CLASS: CATEGORY\*\*



**Findability – Top in class (100%)**  
Saison Card



**Product pages – Top in class (100%)**  
Aeon, Aflac, Cedyna, Daiwa Securities, Idemitsu Card,  
Lake ALSA, Matsui Securities, Sumitomo Mitsui Card,  
Monex Securities and Saison Card



**Registration and conversion – Top in class (100%)**  
Aflac, Cedyna and Daiwa Securities



**Mobile design – Top in class (100%)**  
Monex Securities and Saison Card

\*\* 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.

# HOW TO BE A MOBILE MASTER



Our top recommendations for financial service sites for your region



**75%** of sites surveyed can improve **mobile design** this way:

## **Avoid carousels, or at least let users control them**

It can be difficult and annoying to process information on moving images. If a carousel must be implemented, it should not auto-rotate and users should be able to see that they can control it (e.g. arrow buttons, dots to indicate multiple images).



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

## **When there are no matching search results, provide some next steps or guidance**

Dead ends in a shopping journey can leave users lost. Suggestions, guidance or at least a message telling users what went wrong give potential customers an idea of what they can do next to continue.



**33%** of sites surveyed can improve **mobile design** this way:

## **Ensure that all pages are served over HTTPS**

Data security and privacy is important to customers and this is especially so with financial websites. Ensuring that pages are served over HTTPS assures customers that the brand is aligned with modern website security standards.

# 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

On the search page of Mitsui Sumitomo Card, users can select multiple filter conditions to help them quickly find the best card for them.



## PRODUCT PAGES

Daiwa Securities uses high-resolution images and a clear layout to display product information in an easily readable and understandable way.



## REGISTRATION AND CONVERSION

SMBC Card helps users complete forms by bringing up the number keypad for numeric input fields and highlighting mistakes in real time.



## MOBILE DESIGN

Aflac labels icons, uses easy-to-read font and colours and ensures that touch targets are large enough to make its mobile site easy to navigate.





# INDUSTRY INSIGHTS

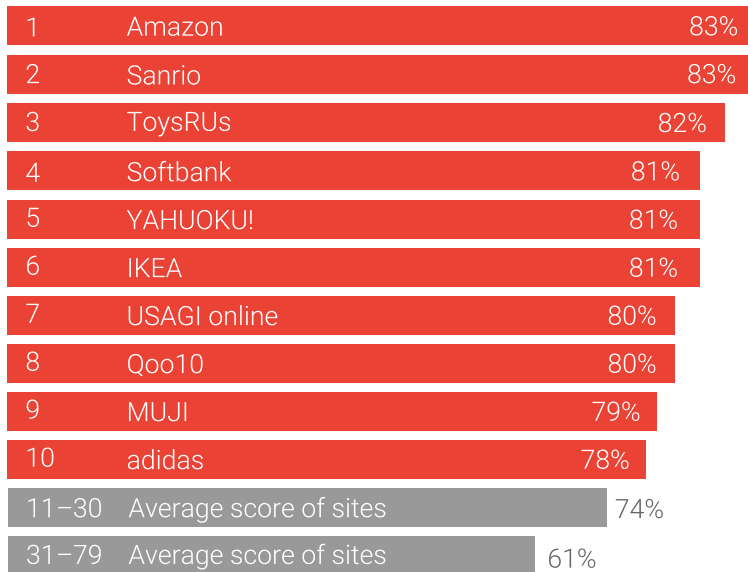
## RETAIL & COMMERCE



# RETAIL & COMMERCE

## MEET THE MOBILE MASTERS

Consumers increasingly expect mobile sites to be fast and easy to use. We reviewed the 79 most trafficked retail and commerce websites in Japan for their user experience including speed, and list the top 10 scoring sites below.



“ As a global company, we have been continuously improving our user experience based on customer behavior in Japan while keeping in alignment with our global style guide. Beyond that, we also focus on improvement of omni-channel purchasing experiences, from store pickup service, to payment, to customer data standardization. ”



Tomoko Iwasaki, Senior Director of Direct to Consumer, adidas Japan

### BEST IN CLASS: CATEGORY\*\*



**Findability – Top in class (89%)**  
MUJI and YAHUOKU!



**Product pages – Top in class (100%)**  
Qoo10 and USAGI Online



**Registration and conversion – Top in class (95%)**  
Softbank



**Mobile design – Top in class (100%)**  
Amazon and IKEA

\*\* 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.

# HOW TO BE A MOBILE MASTER



Our top recommendations for retail & commerce sites across your region



**84%** 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.



**58%** of sites surveyed can improve **findability** this way:

## Allow users to apply multiple filters at once without reloading the page

Users can have multiple criteria for products they want. If a mobile site reloads every time a new filter is added, it can be disruptive to the user experience and can unnecessarily slow down the shopping journey.



**46%** 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.

# 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



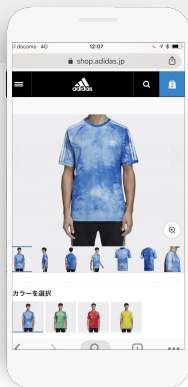
## FINDABILITY

YAHUOKU! helps users get where they need to faster, with autocomplete suggestions for searches based on relevant keywords.



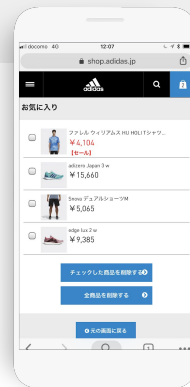
## PRODUCT PAGES

The adidas site facilitates browsing by letting users browse and choose different product colors and materials on the same page.



## REGISTRATION AND CONVERSION

On the adidas site, users can narrow down their favorite products into a guest wishlist, without forcing users to register or login.



## MOBILE DESIGN

MUJI's mobile design is clean, uses high-quality, professional-looking images and has no visual clutter. The site and branding are consistent across devices.



# INDUSTRY INSIGHTS

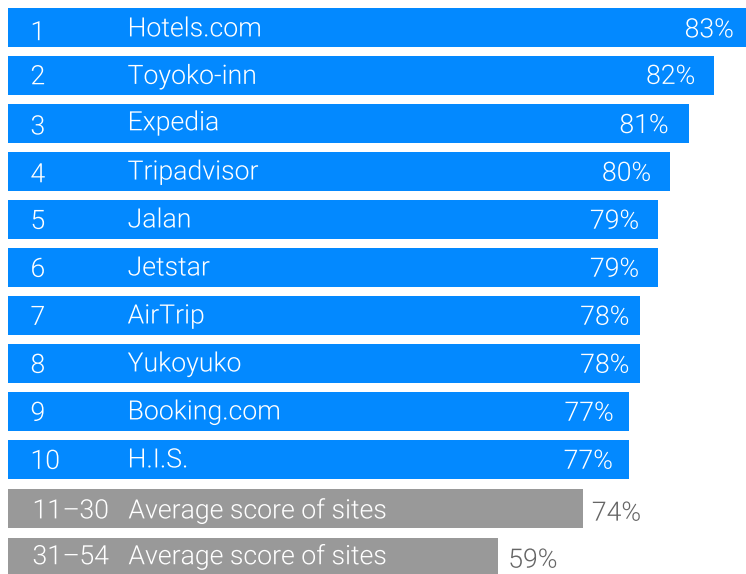
## TRAVEL



# TRAVEL

## MEET THE MOBILE MASTERS

Consumers increasingly expect mobile sites to be fast and easy to use. We reviewed the 54 most trafficked travel websites in Japan for their user experience including speed, and list the top 10 scoring sites below.



“ We have been working to improve our customer experience by providing a stress-free booking experience. We focused on the hotel pages especially, improving customer engagement by providing necessary and sufficient information in a format that is easy to compare, and by crafting a design that’s focused on ease of reservation. ”



Syuhei Yoshida, Vice President, Yukoyuko

### BEST IN CLASS: CATEGORY\*\*



**Findability – Top score (95%)**  
Hotels.com



**Product pages – Top score (100%)**  
AirTrip, Hotels.com, Toyoko-inn, Yukoyuko



**Registration and conversion – Top score (89%)**  
Expedia, Hotels.com, Jetstar, Yukoyuko



**Mobile design – Top score (93%)**  
Jetstar, Toyoko-inn and Tripadvisor

\*\* 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.

# HOW TO BE A MOBILE MASTER



Our top recommendations for travel sites across your region



**63%** of sites surveyed can improve **findability** this way:

## Make it easy to clear or reset filters for search results

A booking journey often involves trying out different options and filtering criteria. Not making it easy to clear or reset filters in search results slows down this journey and may even add unnecessary frustration for potential customers.



**52%** of sites surveyed 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.



**35%** of sites surveyed can improve **mobile design** this way:

## Avoid unrequested pop-ups or interstitials

With limited screen space, mobile sites need to provide clear and unambiguous paths to conversion without competing calls for their attention. Unwanted pop-ups or interstitials cause distraction or annoyance, especially if they cannot be minimised or removed.



# HERE'S HOW THE MOBILE MASTERS DO IT

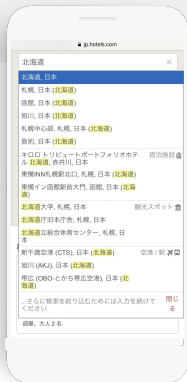


Take a look at how the leading travel brands in your region are doing so well



## FINDABILITY

When searching on Hotels.com, the site provides autocomplete suggestions across several categories, showcasing the breadth of options available.



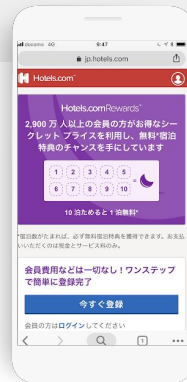
## PRODUCT PAGES

Hotels.com uses a consistent layout for accommodation information, making it straightforward for users to compare their options.



## REGISTRATION AND CONVERSION

Hotels.com encourages people to register by explaining the benefits of creating an account with them in an easy-to-understand way.



## MOBILE DESIGN

Airtrip labels its icons, uses easily readable font and colours and ensures that touch targets are large enough to make its mobile site easy to navigate.



# 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.<sup>3</sup> 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 May 21 - August 31, 2018. Speed measurements were conducted between July 16 - July 25, 2018.

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