



MASTERS OF MOBILE

India Regional Report



| Accenture Interactive

EXECUTIVE SUMMARY

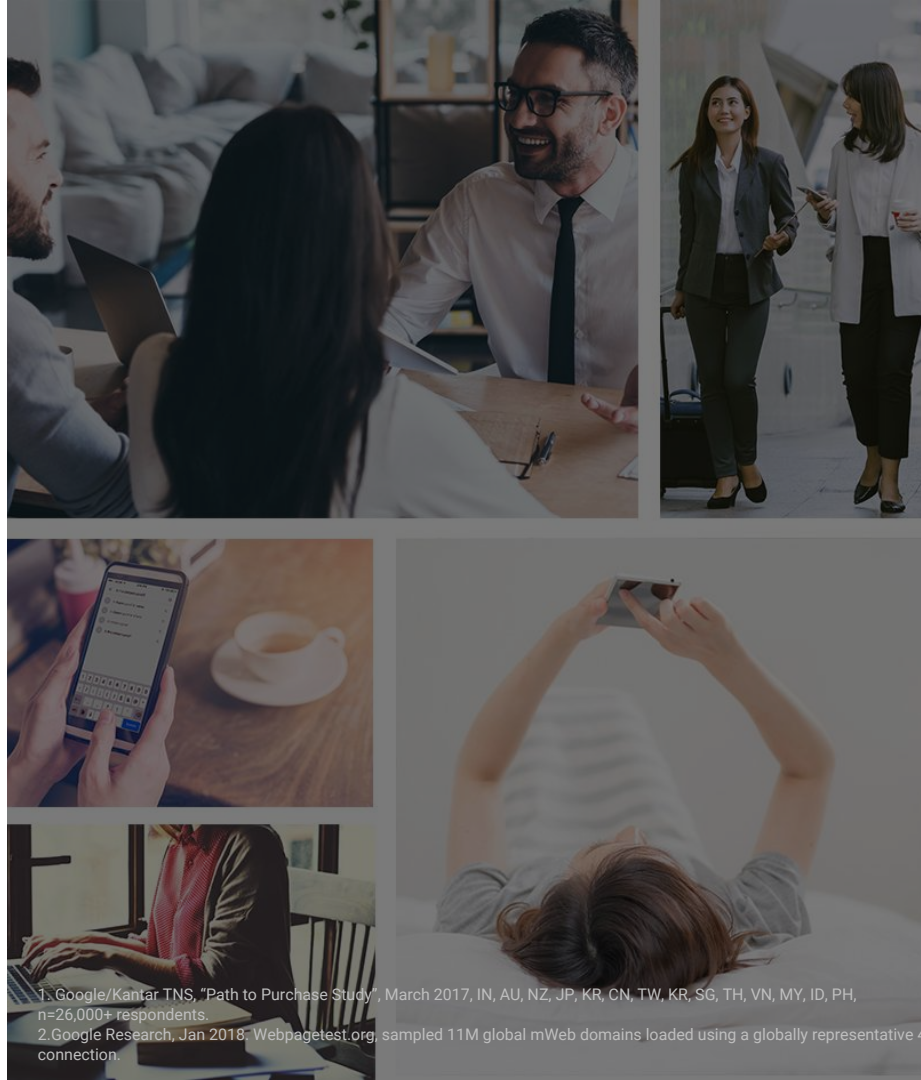
Consumers have high expectations of mobile sites, which play a critical role in their purchase decisions. 62% of Indian consumers conduct pre-purchase research on smartphones¹, and 53% of consumers will leave a mobile site that takes longer than three seconds to load.²

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.

In India, the main barriers for user experience are slow site speed. The region averages around 55% on speed.

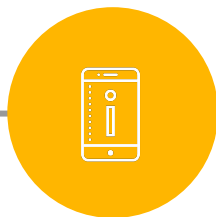
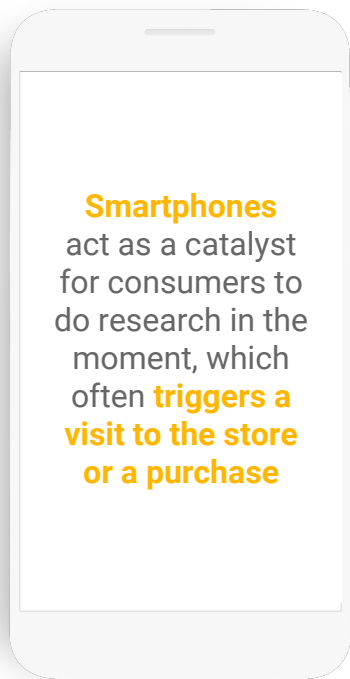
We've identified mobile masters in India that demonstrates exemplary performance for mobile web experience. This report further celebrates the top mobile sites in each industry and showcases best practices.



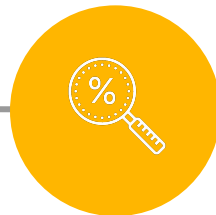
¹ Google/Kantar TNS, "Path to Purchase Study", March 2017, IN, AU, NZ, JP, KR, CN, TW, KR, SG, TH, VN, MY, ID, PH, n=26,000+ respondents.

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

MOBILE PLAYS A CRITICAL ROLE IN CONSUMERS' PURCHASE DECISIONS



62%
of consumers in India on average do pre-purchase research online using a smartphone



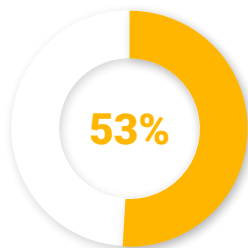
74%
of consumers in India will still look for information online, even at the point of sale in store.



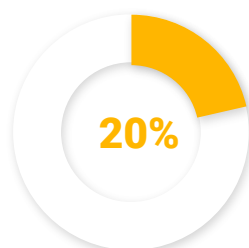
65%
of consumers in India who purchase online prefer to do it on a smartphone.¹

AS A RESULT, CONSUMERS HAVE HIGH EXPECTATIONS FOR MOBILE SITES

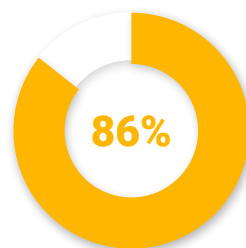
Brands that do not prioritise great mobile experience risk poor conversions.



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 Indian consumers are more likely to purchase from mobile sites that **make it easy to purchase or find answers**¹

1. All data in slide from: 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, Jan, 2018. Webpagetest.org, sampled 11M global mWeb domains loaded using a globally representative 4G connection.

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



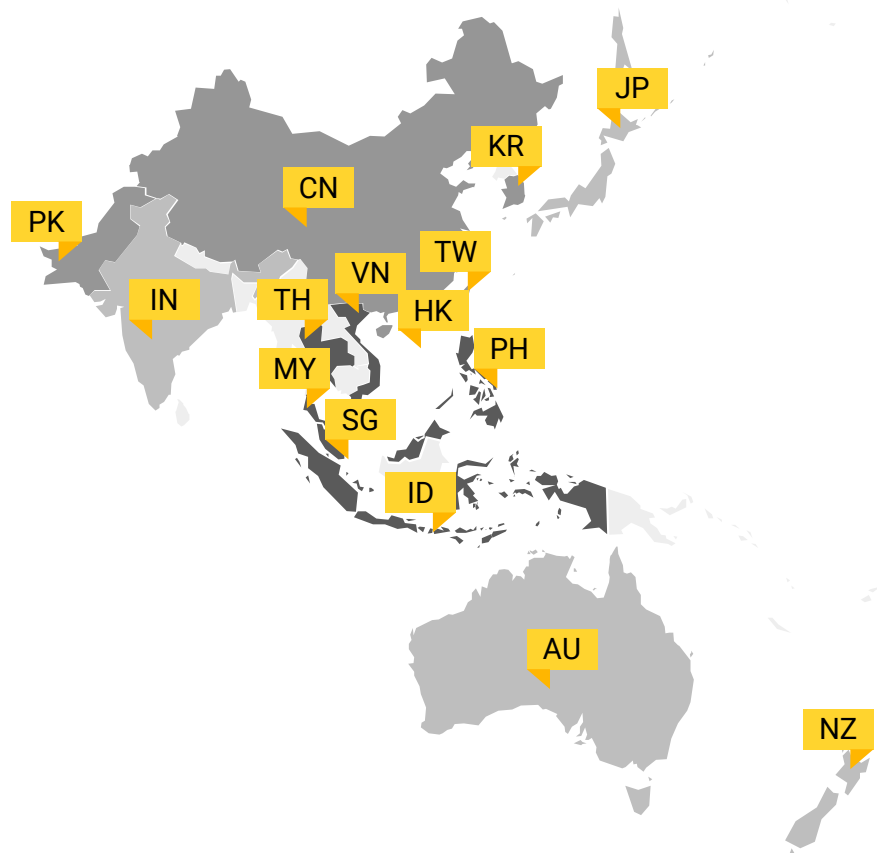
15 countries in **5** sub-regions covered



80 UX industry best practice guidelines used



45 specialists and engineers involved



WE EVALUATED 110 MOBILE SITES IN INDIA



FINANCIAL SERVICES

39 mobile sites assessed

- 18 banks
- 8 insurers
- 7 trading platforms
- 6 comparison sites



RETAIL AND COMMERCE

39 mobile sites assessed

- 29 e-commerce firms
- 10 retailers



TRAVEL

32 mobile sites assessed

- 11 airlines
- 8 bus / train sites
- 5 hotels
- 8 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.

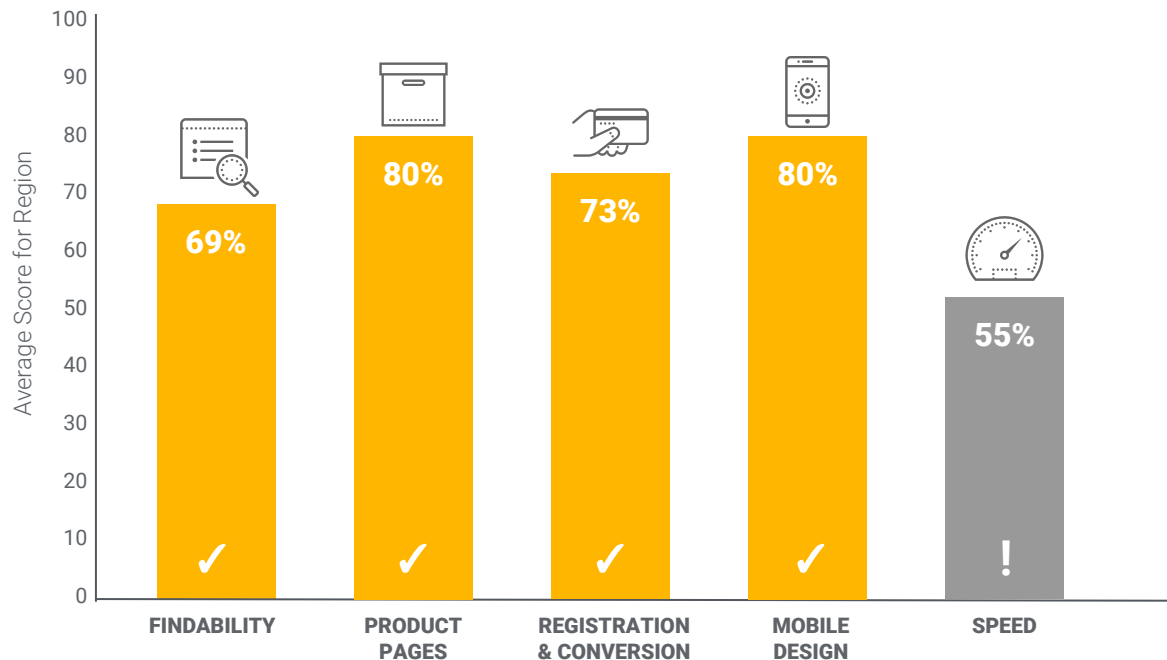
** Speed is measured through an automated process reviewed and managed by web speed performance engineers.

REGION OVERVIEW

INDIA

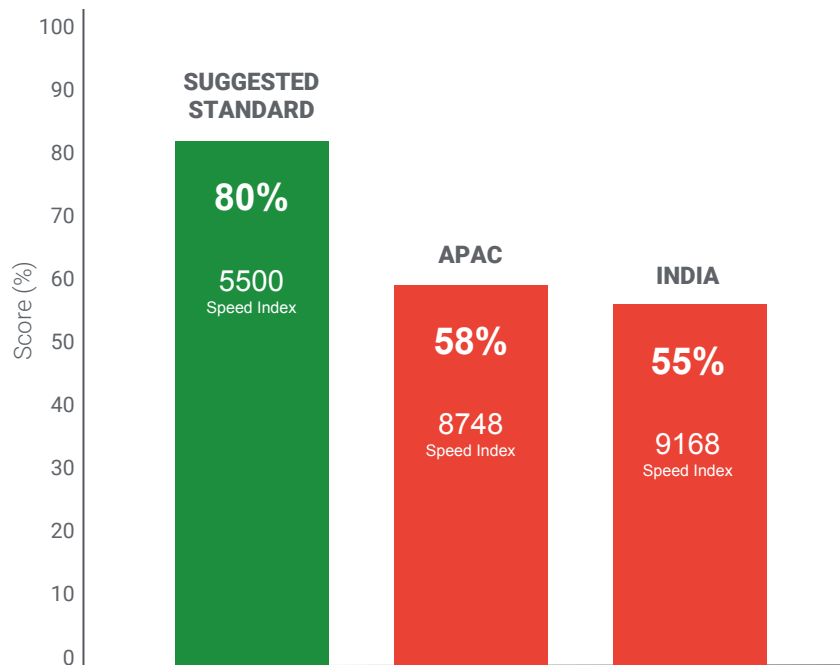
Mobile websites in this region score well in all categories except speed

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 India 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 the region



70% of mobile sites surveyed in India 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, even on slower connections



43% of Indian mobile sites surveyed in India 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.



42% of Indian mobile sites surveyed in India can improve their speed this way:

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.

MEET THE MOBILE MASTERS

These are some best in class brands that provide consumers in India a great mobile experience*



FINANCIAL SERVICES

BankBazaar
IIFL
Kotak Mahindra Bank
Max Life Insurance

63%
Industry Average



RETAIL AND COMMERCE

Amazon
CaratLane
Flipkart
Shoppers Stop

70%
Industry Average



TRAVEL

Cleartrip
Jet Airways
redBus.in
Yatra

65%
Industry Average

INDUSTRY INSIGHTS

FINANCIAL SERVICES



HERE'S HOW THE MOBILE MASTERS DO IT

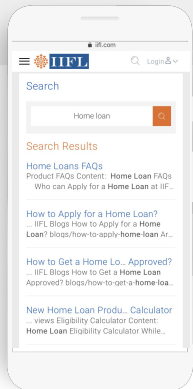


Take a look at how the leading financial services firms in your region are doing so well



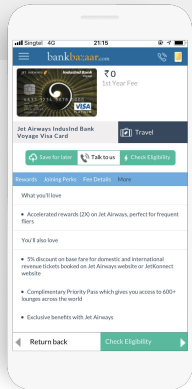
FINDABILITY

IIFL's on-site search helps users get to the next step in their browsing journey with relevant and helpful search results.



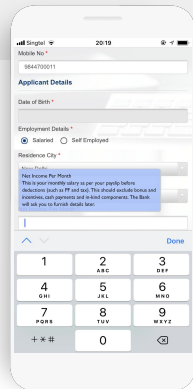
PRODUCT PAGES

BankBazaar uses consistent layouts and reduces information into easy-to-read points, making it a breeze to compare complex products.



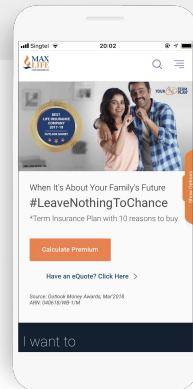
REGISTRATION AND CONVERSION

Kotak Mahindra Bank's application exemplifies good form design by using the appropriate keyboard type and providing clear instructions.



MOBILE DESIGN

Using clear headings, not cluttering pages and avoiding pop-ups makes the Max Life Insurance site look professional and mobile-ready.



HOW TO BE A MOBILE MASTER



Our top recommendations for financial service sites for your region



72% 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.



44% of sites surveyed can improve **findability** this way:

Ensure that on-site search is visible above the fold on all pages

On-site search shortens conversion journeys when potential customers already know what they're looking for and don't need to browse through the menu system. Making users manually look for the search adds unnecessary friction to this process.



36% of sites surveyed can improve **mobile design** this way:

Avoid displaying desktop pages on mobile browsers

On pages that have not been mobile-optimised, text and buttons are much smaller and users must often re-frame the page themselves. At best, this disrupts users' progress. At worst, it could frustrate them enough to make them leave the site.

INDUSTRY INSIGHTS

RETAIL & COMMERCE



HERE'S HOW THE MOBILE MASTERS DO IT

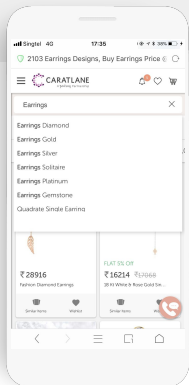


Take a look at how the leading retail & commerce brands in your region are doing so well



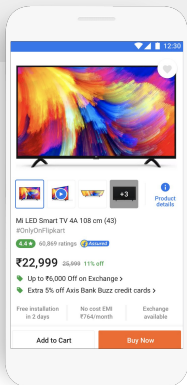
FINDABILITY

CaratLane suggests search terms based on similar popular searches, helping potential customers quickly find what they want.



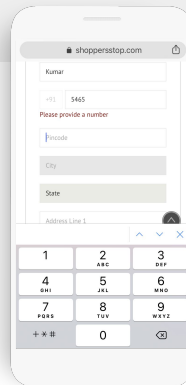
PRODUCT PAGES

Flipkart's product pages use quality images, present important information first and always keeps the purchase CTA within easy reach.



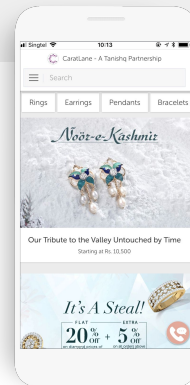
REGISTRATION AND CONVERSION

Shoppers Stop speeds up checkout forms by bringing up the number pad for numeric fields and indicating form entry mistakes in real time.



MOBILE DESIGN

CaratLane's elegant site design uses easily readable font, headings and buttons and uses quality images to create a positive brand experience.



HOW TO BE A MOBILE MASTER



Our top recommendations for retail & commerce sites across your region



74% 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 retail sites. But not making new users aware of these mean that they may miss out on why they should take these additional steps, losing many sites an opportunity to convert.



59% of sites surveyed can improve **registration and conversion** this way:

Allow users to purchase products as guests

Making accounts mandatory for checkout adds friction to the conversion process, as it requires additional decision-making and effort from potential customers. This increases the likelihood that users will not complete their purchase.



44% 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 unnecessarily slow down the shopping journey.

INDUSTRY INSIGHTS

TRAVEL



HERE'S HOW THE MOBILE MASTERS DO IT

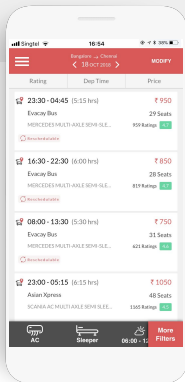


Take a look at how the leading travel brands in your region are doing so well



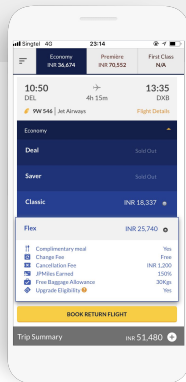
FINDABILITY

Clean formatting and carefully selected content makes redBus.in's search results painless to scan. Filters are also well-implemented.



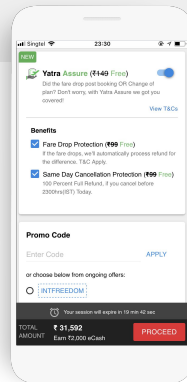
PRODUCT PAGES

Jet Airways condenses key information into concise points to easily compare different fare types without leaving the search results.



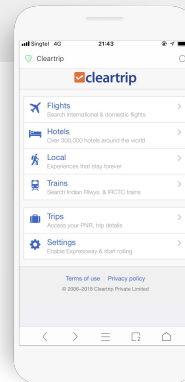
REGISTRATION AND CONVERSION

Yatra's checkout process encourages booking completion by reinforcing selling points and displaying a timer. It also shows the final price at all times.



MOBILE DESIGN

Cleartrip's straightforward design and consistent branding makes the site easy to use on any device, even with a wide range of services.



HOW TO BE A MOBILE MASTER



Our top recommendations for travel sites across your region



78% 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.



75% of sites surveyed can improve **product pages** this way:

Allow users to save travel options 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.



47% of sites surveyed can improve **registration and conversion** this way:

Indicate progress on every page of a booking process

Progress indicators let potential customers know where they are in a booking process and can be a motivator for some to finish. If users are not sure how far along they are in a longer booking process, it can feel endless and users may abandon it out of impatience.

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 26 - August 15, 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 Research (2018, Jan). Webpagetest.org, sampled 11M global mWeb domains loaded using a globally representative 4G connection.
3. 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>