MASTERS OF MOBILE

Greater China
Regional Report 2018

Google | **Accenture** Interactive

EXECUTIVE SUMMARY

Consumers have high expectations of mobile sites, which play a critical role in their purchase decisions. 66% of consumers in Greater China conduct pre-purchase research on smartphones[1], and 53% of them will abandon a mobile site that takes more than 3 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.

The next steps for many sites in Greater China are to go from good to great. Most sites achieved average to above-average scores, doing best on product pages and worst on speed.
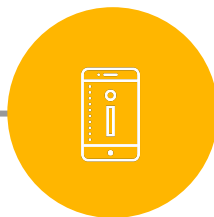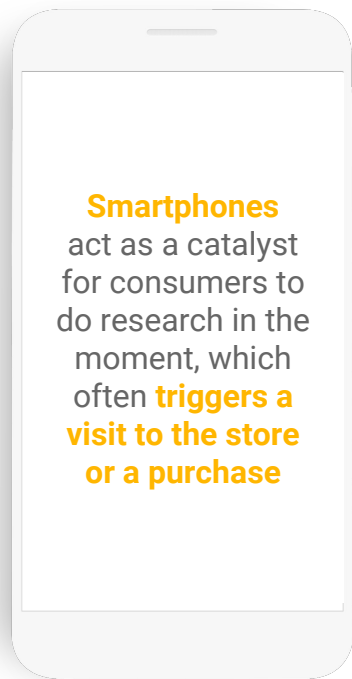
IG Group, iHerb and HK Express top their industries as mobile masters in the region. This report celebrates the top five sites in each industry and showcases what they do as best practices.
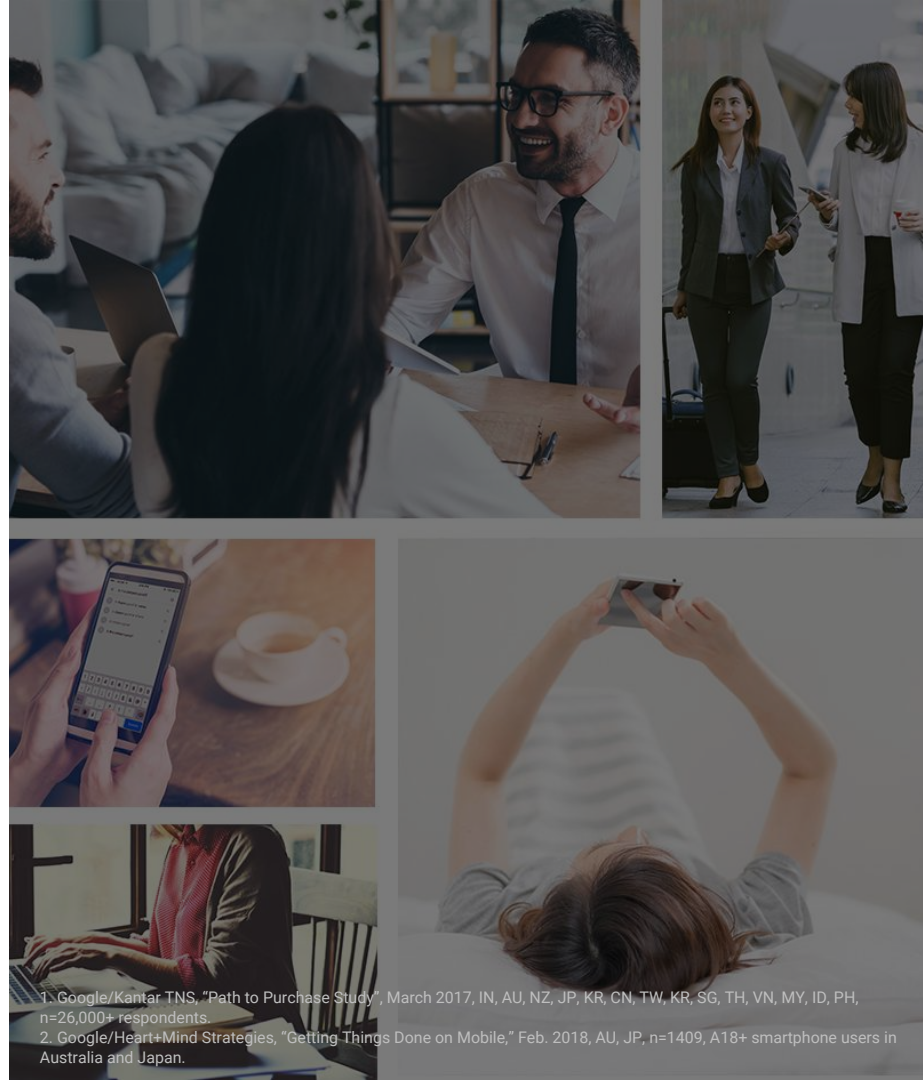
1. Google/Kantar TNS, "Path to Purchase Study", March 2017, IN, AU, NZ, JP, KR, CN, TW, KR, SG, TH, VN, MY, ID, PH, n=26,000+ respondents.
2. Google/Heart+Mind Strategies, "Getting Things Done on Mobile," Feb. 2018, AU, JP, n=1409, A18+ smartphone users in Australia and Japan.

MOBILE PLAYS A CRITICAL ROLE IN CONSUMERS' PURCHASE DECISIONS

Smartphones act as a catalyst for consumers to do research in the moment, which often **triggers a visit to the store or a purchase**

66% of consumers in Greater China on average do pre-purchase research online using a smartphone
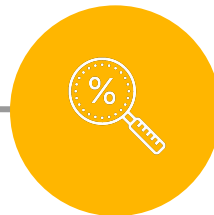
88% of consumers in Greater China will still look for information online, even at the point of sale in store.
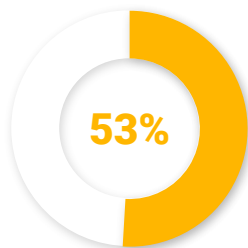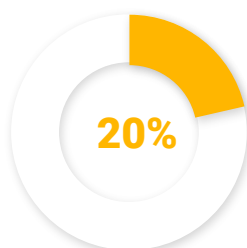
56% of consumers in Greater China who purchase online prefer to do it on a smartphone[1]

AS A RESULT, CONSUMERS HAVE HIGH EXPECTATIONS FOR MOBILE SITES

Brands that do not prioritise great mobile experience risk poor conversions.[2]

53%

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

20%

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

72%
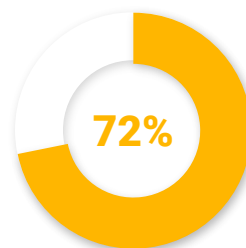
of consumers in Greater China are more likely to purchase from mobile sites that **make it easy to purchase or find answers**

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.

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:
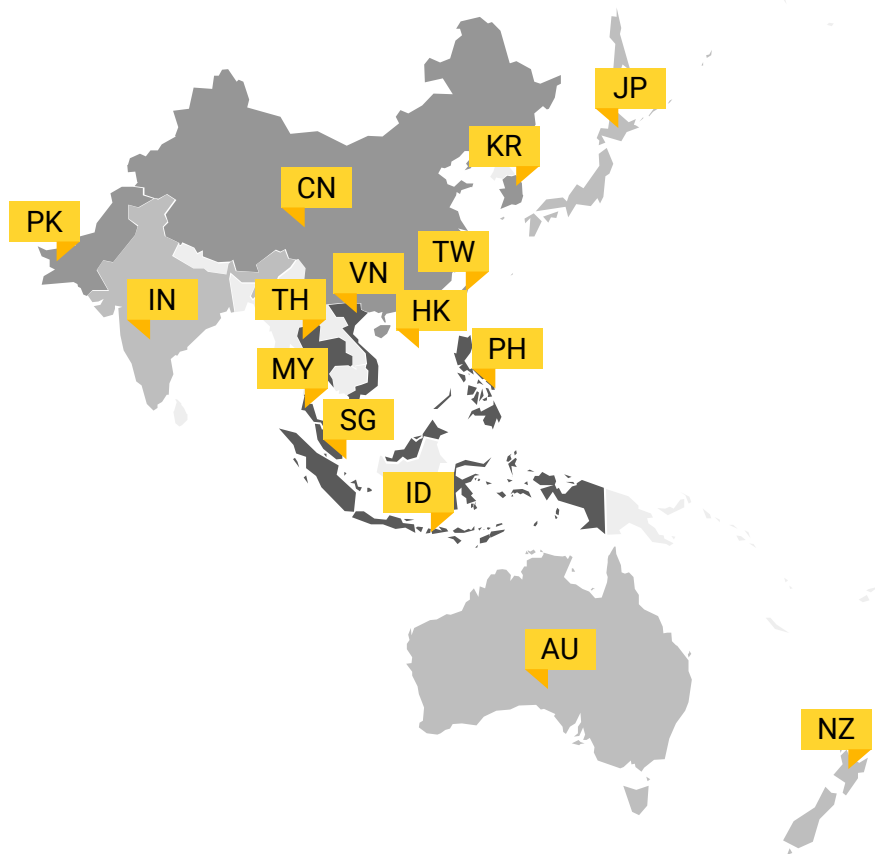
720+ mobile sites assessed

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

80 UX industry best practice guidelines used

45 specialists and engineers involved

PK · IN · CN · TH · VN · TW · KR · JP · HK · PH · MY · SG · ID · AU · NZ

WE EVALUATED
153 MOBILE SITES IN GREATER CHINA

FINANCIAL SERVICES

51 mobile sites assessed
41 banks
4 trading firms
3 mutual funds
2 insurance firms
1 comparison site

RETAIL AND COMMERCE

55 mobile sites assessed
41 e-commerce firms
9 retailers
4 car marketplaces
1 grocer

TRAVEL

47 mobile sites assessed
26 travel aggregators
13 hotels
5 airlines
3 other travel sites

CN

TW

HK

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 is 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 Greater China with a great mobile experience

FINANCIAL SERVICES

1	IG Group (HK)	86%
2	DBS Bank (HK)*	82%
3	China Construction Bank (CN)	81%
4	CIB (CN)	77%
5	Lakala (CN)	77%

64%
Industry Average

RETAIL AND COMMERCE

1	iHerb (HK)*	88%
2	ASUS (TW)	87%
3	JD.com (CN)	86%
4	Huawei (HK)	85%
5	Qichedaquan (CN)	82%

73%
Industry Average

TRAVEL

1	HK Express (HK)	90%
2	Hotels.com (TW)*	86%
3	Klook (HK)*	85%
4	Expedia (HK)*	84%
5	Airbnb (TW)*	84%

76%
Industry Average

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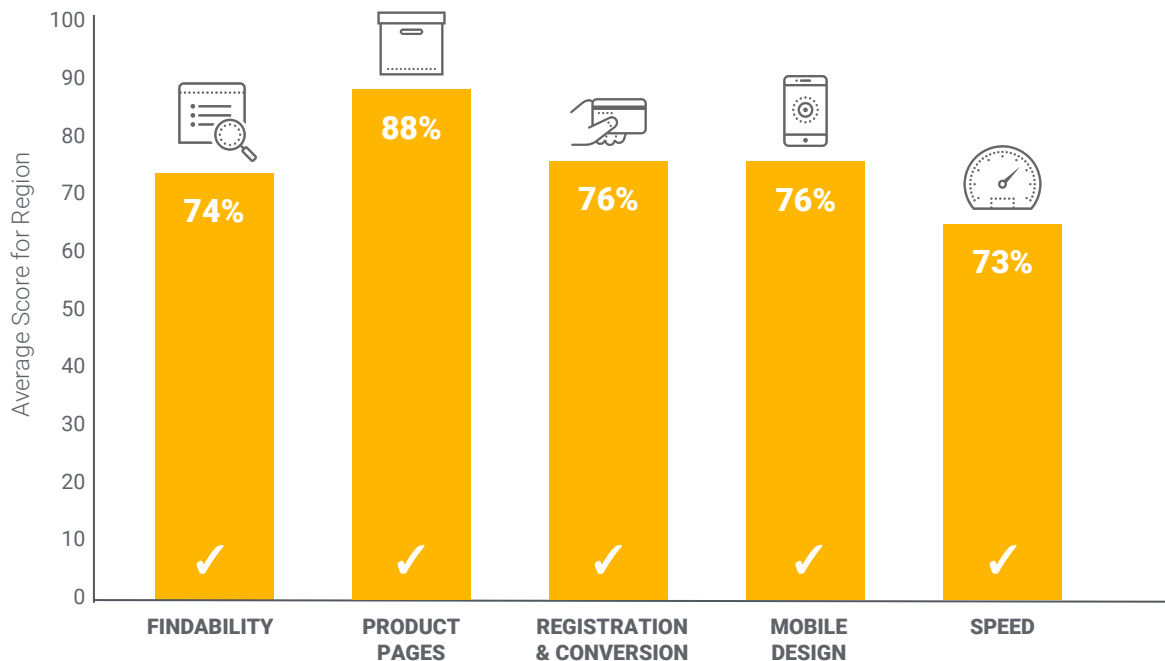
REGION OVERVIEW
GREATER CHINA

Mobile websites in this region score average to well across all categories.

Most mobile sites in this region **score average or better** in every category. For most, their next steps should focus on taking their sites experience **from good to great.**

Average Score for Region

| FINDABILITY | PRODUCT PAGES | REGISTRATION & CONVERSION | MOBILE DESIGN | SPEED |
| 74% | 88% | 76% | 76% | 73% |

LOOKING INTO SPEED

How speed scores in Greater China compare to the APAC average and the suggested industry standard
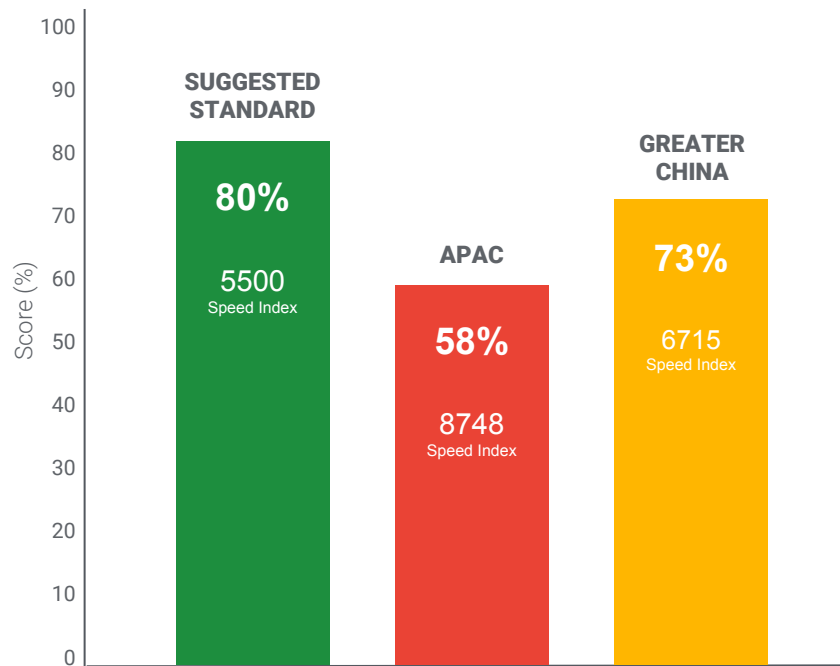
What do these scores mean?

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 measures 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%)**

Chart data:

	SUGGESTED STANDARD	APAC	GREATER CHINA
Score (%)	80%	58%	73%
Speed Index	5500	8748	6715

HOW TO IMPROVE SPEED

Our top speed recommendations for Greater China

72% of Chinese 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

60% of Chinese 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.

54% of Chinese 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.
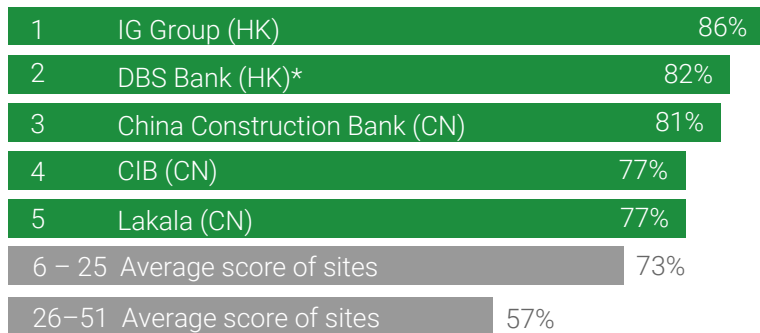
INDUSTRY INSIGHTS
FINANCIAL SERVICES

FINANCIAL SERVICES
MEET THE MOBILE MASTERS

Consumers increasingly expect mobile sites to be fast and easy to use. We reviewed the 51 most trafficked financial services websites in Greater China for their user experience including speed, and list the top 5 scoring sites below.

1	IG Group (HK)	86%
2	DBS Bank (HK)*	82%
3	China Construction Bank (CN)	81%
4	CIB (CN)	77%
5	Lakala (CN)	77%
6 – 25	Average score of sites	73%
26–51	Average score of sites	57%

BEST IN CLASS: CATEGORY**

Findability – Top in class (87%)
Citibank, DBS Bank and IG Group

Product pages – Top in class (100%)
Cathay Bank, China Construction Bank, Citibank, Cnfol.com, DBS Bank, IG Group and Tai Shin Bank

Registration and conversion – Top in class (92%)
China Construction Bank, CIB, IG Group

Mobile design – Top in class (92%)
IG Group

* 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 financial services firms in your region are doing so well

FINDABILITY

Cathay Bank's on-site search shows relevant results first and provides powerful filtering tools to get users where they want to go quickly.

PRODUCT PAGES

DBS Bank's product pages list important benefits first and uses bullet points to make the layout consistent. CTAs are prominent and visible.
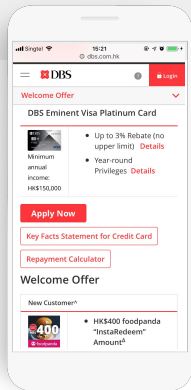
REGISTRATION AND CONVERSION

Tai Shin Bank's application forms are easy to complete, only ask for what is needed and provide clear instructions and progress indication.

MOBILE DESIGN

Cathay Bank exemplifies good mobile site design by having clear labels and headings, a clean layout and a consistent experience across devices.

HOW TO BE A MOBILE MASTER

Our top recommendations for financial service sites for your region

86% 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.

84% 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.

55% of sites surveyed can improve **mobile design** this way:

Ensure that all pages are served over HTTPS

Data security 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 and their data is being protected by the brand.
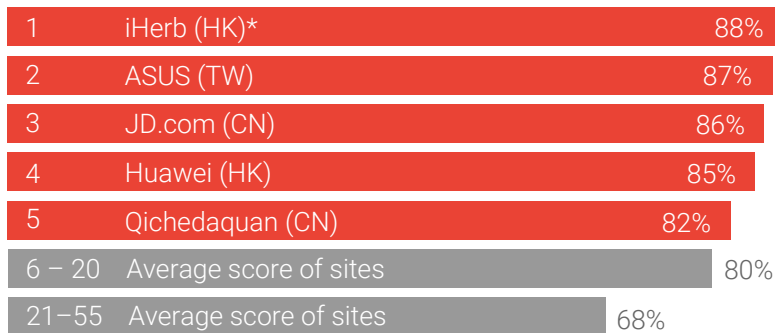
INDUSTRY INSIGHTS
RETAIL & COMMERCE

RETAIL & COMMERCE
MEET THE MOBILE MASTERS

Consumers increasingly expect mobile sites to be fast and easy to use. We reviewed the 55 most trafficked retail and commerce websites in Greater China for their user experience including speed, and list the top 5 scoring sites below.

1	iHerb (HK)*	88%
2	ASUS (TW)	87%
3	JD.com (CN)	86%
4	Huawei (HK)	85%
5	Qichedaquan (CN)	82%
6 – 20	Average score of sites	80%
21–55	Average score of sites	68%

" For an e-commerce, excellent UX design can effectively improve user experience, order conversion rate and sales. And especially critical is the design of the core purchasing process. One misstep is an opportunity cost of millions of dollars. Our product team strives to be the industry's benchmark and places high importance on constant iteration and measurement of our website experience. "

Yinong Guo, Product Director, JD.com

BEST IN CLASS: CATEGORY**

Findability – Top in class (94%)
JD.com and Ruten

Product pages – Top in class (100%)
ASUS

Registration and conversion – Top in class (95%)
Huawei and iHerb

Mobile design – Top in class (93%)
ASUS, eBay and Etsy

* 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

JD.com suggests popular searches to make its on-site search more powerful. Search results are also easy to skim and filter.

PRODUCT PAGES

JD.com's product pages help decision-making with consistent layouts, prominent CTAs, detailed and useful information, and helpful related recommendations.
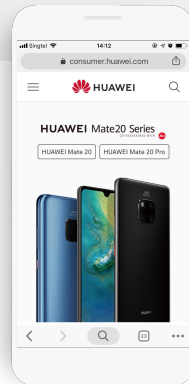
REGISTRATION AND CONVERSION

Weipinhui's checkout process uses autofill for all form fields to reduce input errors and to help users fill out mobile forms more quickly.

MOBILE DESIGN

Huawei exemplifies good mobile site design by using a clean layout that is consistent across devices, high quality images and HTTPS across all pages.

HOW TO BE A MOBILE MASTER

Our top recommendations for retail & commerce sites across your region

69% 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.

63% 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.

62% 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).

INDUSTRY INSIGHTS
TRAVEL

TRAVEL
MEET THE MOBILE MASTERS

Consumers increasingly expect mobile sites to be fast and easy to use. We reviewed the 47 most trafficked travel websites in Greater China for their user experience including speed, and list the top 5 scoring sites below.

Rank	Site	Score
1	HK Express (HK)	90%
2	Hotels.com (TW)*	86%
3	Klook (HK)*	85%
4	Expedia (HK)*	84%
5	Airbnb (TW)*	84%
6 – 20	Average score of sites	81%
21–47	Average score of sites	71%

"Customer centricity is our core mission and we look to build meaningful customer experiences through insight driven marketing and constant innovation. So many of our consumers are on digital, web and mobile everyday so it's a no-brainer to ensure we offer the best experience online possible. It's only good for business."

Eric Thain, Brand Development GM, HK Express

BEST IN CLASS: CATEGORY**

Findability – Top score (95%)
Expedia, Hotels.com and Qunar

Product pages – Top score (100%)
HK Express

Registration and conversion – Top score (100%)
HK Express and Booking.com

Mobile design – Top score (93%)
Fliggy and Klook

* 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
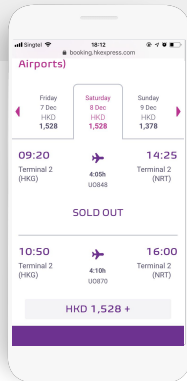
FINDABILITY

Airbnb's on-site search uses autocomplete to suggest popular searches. Search results are relevant and easy to skim, filter and compare.

PRODUCT PAGES

HK Express uses a clean, consistent layout for trip options. Users can easily change dates and see if a trip is sold out. CTAs are prominent and visible.

REGISTRATION AND CONVERSION

HK Express' booking process is clean of unnecessary links and clearly indicates progress through each step of the booking journey.
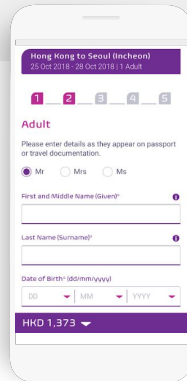
MOBILE DESIGN

Klook's well-designed mobile site pages use high-quality images and reasonably spaces out content to ensure that there is no clutter.

HOW TO BE A MOBILE MASTER

Our top recommendations for travel sites across your region

74% of sites surveyed can improve **product pages** this way:

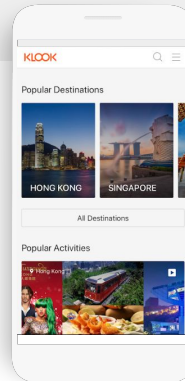## Allow users to save travel options to a guest wishlist

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.

51% 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.

36% of sites surveyed can improve **findability** this way:

Provide a map view of accommodation options

A map view of accommodation options help potential customers to quickly narrow down a sometimes overwhelming number of results to ones that are near on in key areas These maps can be more convenient than traditional filters built for the same purpose.

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.[3] 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 7 - August 28, 2018, 2018. Speed measurements were conducted between July 16 - July 25, 2018.

3. Google I/O 2014 - Design principles for a better mobile web. June 2014. http://bit.ly/2vaNrIK

APPENDIX: COUNTRY BENCHMARK
MOBILE MASTERS: CHINA

FINANCIAL SERVICES

1	China Construction Bank	81%
2	CIB	77%
3	Lakala	77%

65%
Industry Average

RETAIL AND COMMERCE

1	JD.com	86%
2	Qichedaquan	82%
3	Weipinhui	82%

74%
Industry Average

TRAVEL

1	Alitrip	85%
2	Qunar	83%
3	Lvmama	83%

76%
Industry Average

APPENDIX: COUNTRY BENCHMARK
MOBILE MASTERS: HONG KONG

FINANCIAL SERVICES

1	IG Group	86%
2	DBS Bank*	82%
3	China Construction Bank	78%

65%
Industry Average

RETAIL AND COMMERCE

1	iHerb	88%
2	Huawei	85%
3	Ruten	85%

72%
Industry Average

TRAVEL

1	HK Express	90%
2	Hotels.com*	86%
3	Klook*	85%

77%
Industry Average

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

APPENDIX: COUNTRY BENCHMARK
MOBILE MASTERS: TAIWAN

FINANCIAL SERVICES

1	Cathay Bank	75%
2	Tai Shin Bank	75%
No further brands scoring above 70%		

59%
Industry Average

RETAIL AND COMMERCE

1	ASUS	87%
2	Ruten	81%
3	Amazon	80%

72%
Industry Average

TRAVEL

1	Eva Air	87%
2	Hotels.com*	86%
3	Expedia*	85%

75%
Industry Average

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

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. 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