



MASTERS OF MOBILE

Southeast Asia
Regional Report 2018



| Accenture Interactive

EXECUTIVE SUMMARY

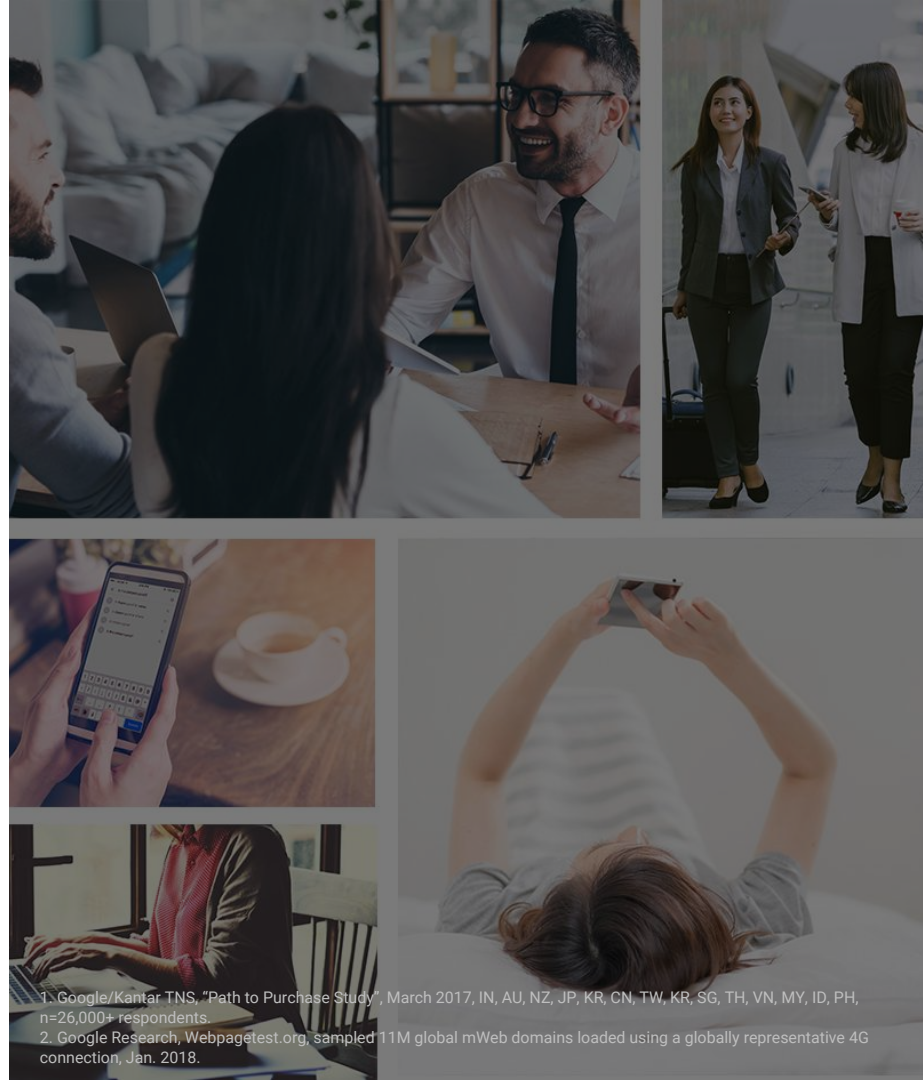
Consumers have high expectations of mobile sites, which play a critical role in their purchase decisions. 59% of consumers in Southeast Asia conduct pre-purchase research on smartphones¹, and 53% of them will abandon a mobile site that takes more than 3 seconds to load.²

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 Southeast Asia are to go from good to great. Most sites achieved average to above-average scores, doing best on product pages and worst on speed.

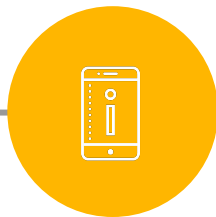
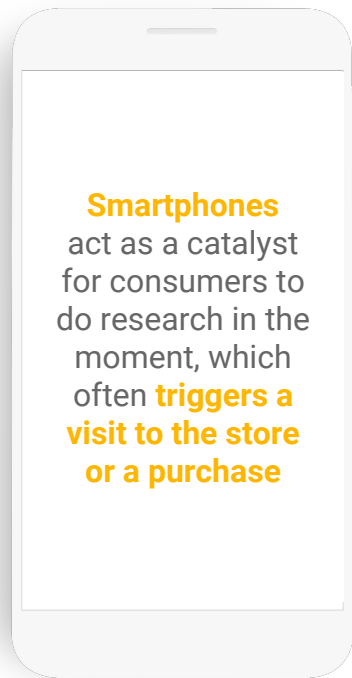
AEON (TH), iHerb (SG) and Expedia (SG) top their industries as mobile masters in the region. This report celebrates the top ten sites in each industry and showcases best practices.



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.

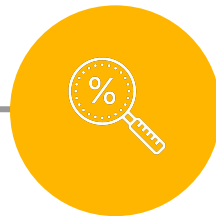
2. Google Research, Webpagetest.org, sampled 11M global mWeb domains loaded using a globally representative 4G connection, Jan. 2018.

MOBILE PLAYS A CRITICAL ROLE IN CONSUMERS' PURCHASE DECISIONS



59%

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



79%

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

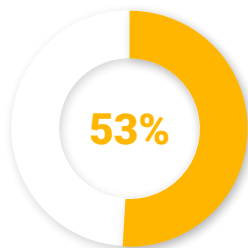


53%

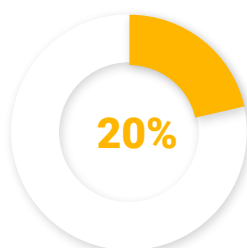
of consumers in Southeast Asia who purchase online prefer to do it on a smartphone.¹

AS A RESULT, CONSUMERS HAVE HIGH EXPECTATIONS FOR MOBILE SITES

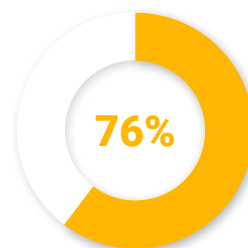
Brands that do not prioritise great mobile experience risk poor conversions.



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

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



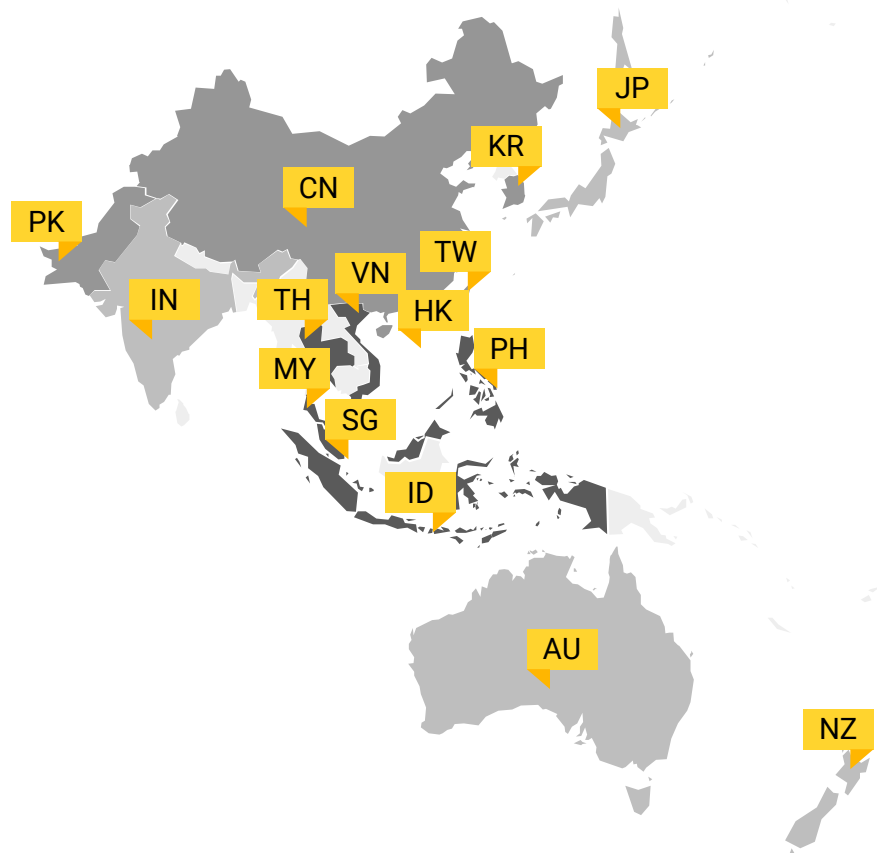
15 countries in **5** sub-regions covered



80 UX industry best practice guidelines used



45 specialists and engineers involved



WE EVALUATED 140 MOBILE SITES IN SOUTHEAST ASIA



FINANCIAL SERVICES

38 mobile sites assessed

- 29 banks
- 3 insurers
- 3 trading platforms
- 3 comparison sites | funds



RETAIL AND COMMERCE

57 mobile sites assessed

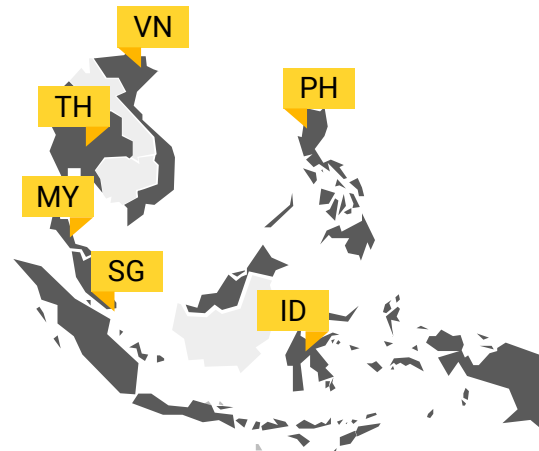
- 45 e-commerce firms
- 8 retailers
- 4 grocers



TRAVEL

45 mobile sites assessed

- 16 airlines
- 14 travel aggregators
- 8 hotels
- 5 bus / train sites
- 2 tour & activity 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 Southeast Asia with a great mobile experience



FINANCIAL SERVICES

1	AEON (TH)	86%
2	NTUC Income (SG)	83%
3	POSB Bank (SG)	82%
4	Phillip Securities (SG)	82%
5	DBS Bank (SG)	81%

65%
Industry Average



RETAIL AND COMMERCE

1	iHerb (SG)	89%
2	Thegioididong.com (VN)	89%
3	Qoo10 (SG)	88%
4	Bhinneka.Com (ID)	87%
5	Điện máy Xanh (VN)	87%

72%
Industry Average



TRAVEL

1	Expedia (SG)	87%
2	Hotels.com* (SG)	86%
3	Klook (SG)	84%
4	Travelbook (PH)	83%
5	Traveloka (ID)	82%

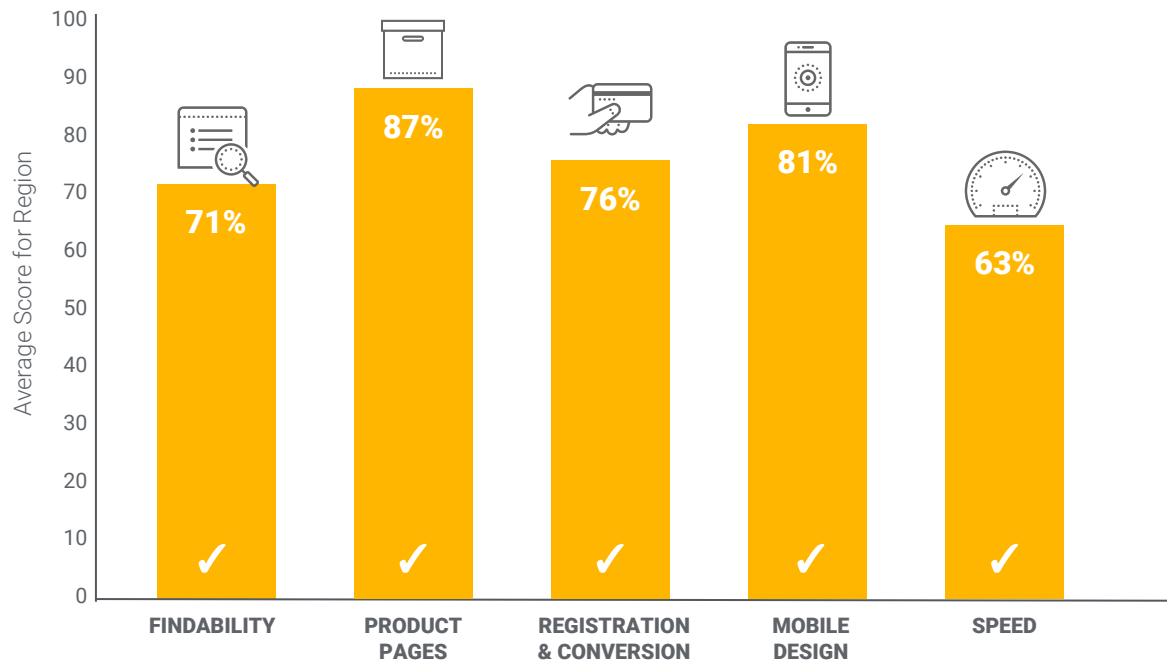
69%
Industry Average

REGION OVERVIEW

SOUTHEAST ASIA

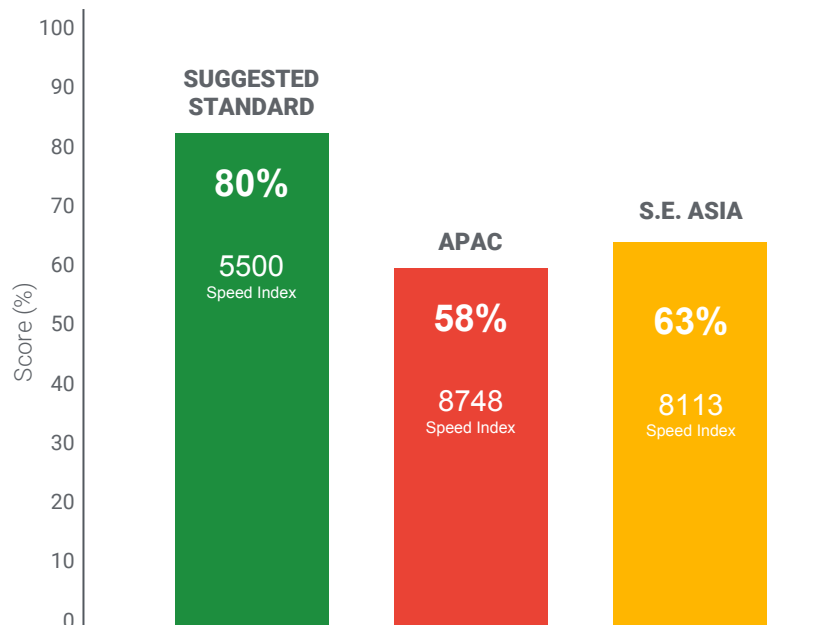
Mobile websites in this region could focus on speed to take their sites from good to great

Most sites in this region achieved average to above average scores. For many sites, one way they can go **from good to great** is to focus on **speed**, which scored the lowest of all the categories.



LOOKING INTO SPEED

How speed scores in Southeast Asia 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 Southeast Asia



87% 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



63% 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.



61% 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 38 most trafficked financial services websites in Southeast Asia for their user experience including speed, and list the top 10 scoring sites below.

1	AEON (TH)	86%
2	NTUC Income (SG)	83%
3	POSB Bank (SG)	82%
4	Phillip Securities (SG)	82%
5	DBS Bank (SG)	81%
6	Standard Chartered (SG)	78%
7	Citibank (TH)	77%
8	Maybank (MY)	77%
9	AIA (SG)	75%
10	KTC (TH)	74%
11 – 20 Average score of sites		69%
21 – 38 Average score of sites		53%

“ UX is key in our digital acquisition strategy. During the design process, we engage real users for user research to gain insights from them directly we validate our solutions through UX lab testing. Once the site is launched, we then utilize Google Analytics to analyze our customers’ digital footprint and Optimize 360 to optimise users’ experience further and drive online conversions. ”



Saffry Hoo, Marketing Manager at NTUC Income

BEST IN CLASS: CATEGORY**



Findability – Top in class (87%)

AEON, Citibank, DBS Bank, Phillip Securities and POSB Bank



Product pages – Top in class (100%)

AEON, AIA, Citibank, DBS Bank, Maybank, NTUC Income, POSB Bank and Standard Chartered



Registration and conversion – Top in class (92%)

POSB Bank and Standard Chartered



Mobile design – Top in class (92%)

NTUC Income and Standard Chartered

** 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

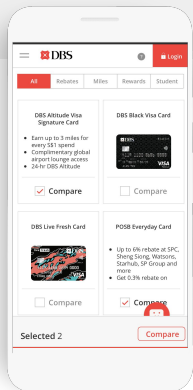


Take a look at how the leading financial services firms in your region are doing so well



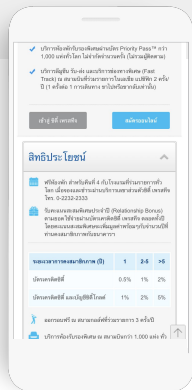
FINDABILITY

DBS Bank provides an easy-to-use, mobile-friendly comparison tool to help potential customers find the credit card that's best for them.



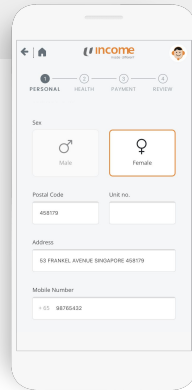
PRODUCT PAGES

Citibank (TH) uses tables and bullet points make it easy for potential customers to learn about and compare complex financial products.



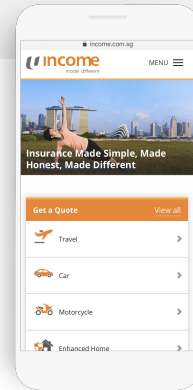
REGISTRATION AND CONVERSION

NTUC Income's application forms ask only for what is necessary and looks up addresses automatically based on postcode, making conversion easier.



MOBILE DESIGN

NTUC Income makes their site feel easy to use by avoiding visual clutter, having appropriately large touch targets and by labelling icons.



HOW TO BE A MOBILE MASTER



Our top recommendations for financial service sites for your region



87% 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.



58% 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).



47% of sites surveyed can improve **findability** this way:

Provide an interactive tool or calculator to help users find the right product for them

Financial products are often complex and difficult to assess and compare. Without tools or calculators, customers either would have to spend a lot more effort finding the product best suited or may be left lost.

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 57 most trafficked retail and commerce websites in Southeast Asia for their user experience including speed, and list the top 5 scoring sites below.

1	iHerb (SG)	89%
2	Thegioididong.com (VN)	89%
3	Qoo10 (SG)	88%
4	Bhinneka.Com (ID)	87%
5	Điện máy Xanh (VN)	87%
6	Amazon (PH)	87%
7	Joybuy (SG)	84%
8	Vatgia.com (VN)	84%
9	BliBli.com (ID)	83%
10	eBay (TH)	82%
11 – 30	Average score of sites	78%
31–57	Average score of sites	62%

“ We understand how important website loading speed is for conversion rate and that we’re living in mobile era. Therefore, we set a challenging KPI for our IT team to optimize loading speed to under 2.5 seconds, both on PC and mobile. We also spread our mobile-first mindset in every activity to make sure everything displays fast and well on mobile devices. ”



Tung Nguyen E-Commerce Director at Điện máy Xanh

BEST IN CLASS: CATEGORY**



Findability – Top in class (89%)

Bhinneka.Com, BliBli.com, Điện máy Xanh, iHerb, Joybuy and Vatgia.com



Product pages – Top in class (93%)

Amazon, iHerb, Qoo10, Thegioididong.com and Vatgia.com



Registration and conversion – Top in class (95%)

iHerb and Qoo10



Mobile design – Top in class (100%)

Bhinneka.Com, Điện máy Xanh, Thegioididong.com

** 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

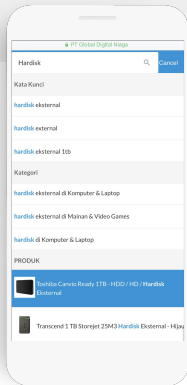


Take a look at how the leading retail & commerce brands in your region are doing so well



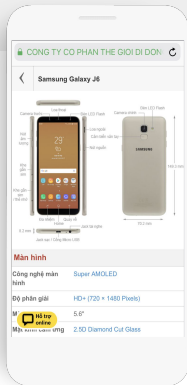
FINDABILITY

BliBli.com suggests popular similar search terms, categories and products to get users more quickly to where they want to be.



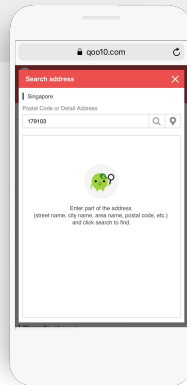
PRODUCT PAGES

Thegioididong.com uses sharp, product images and presents product details in easy-to-read tables to make product comparison effortless.



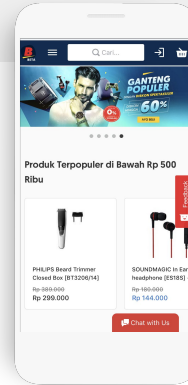
REGISTRATION AND CONVERSION

Qoo10 offers multiple ways to help users enter their delivery address, including postcode search and using the user's current GPS location.



MOBILE DESIGN

Bhinneka.com's mobile site design gives a consistent experience across devices, lets users control carousels and avoids overly cluttering pages.



HOW TO BE A MOBILE MASTER



Our top recommendations for retail & commerce sites across your region



93% 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.



51% 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



TRAVEL

MEET THE MOBILE MASTERS

Consumers increasingly expect mobile sites to be fast and easy to use. We reviewed the 45 most trafficked travel websites in Southeast Asia for their user experience including speed, and list the top 5 scoring sites below.

1	Expedia (SG)	87%
2	Hotels.com* (SG)	86%
3	Klook (SG)	84%
4	Travelbook (PH)	83%
5	Traveloka (ID)	82%
6	Easybook (MY)	80%
7	Airbnb (SG)	80%
8	Malaysia Airlines (MY)	79%
9	Booking.com* (TH)	79%
10	Airy Rooms (ID)	77%
11–30	Average score of sites	73%
31–45	Average score of sites	58%

“ Using AMP as our campaign destination pages saw a significant improvement in load times and resulting conversion rates, particularly from the always-on paid marketing channels. We’ll continue to expand the AMP presence throughout the rest of our mobile web presence as a key driver to improve conversions and lower our acquisition costs. ”



Peter Pohlschmidt, Head of Digital at Malaysia Airlines

BEST IN CLASS: CATEGORY**



Findability – Top score (100%)
Travelbook



Product pages – Top score (92%)
Airbnb, Booking.com, Expedia, Klook, Malaysia Airlines and Traveloka



Registration and conversion – Top score (95%)
Airbnb, Airy Rooms, Booking.com and Easybook



Mobile design – Top score (100%)
Travelbook

* 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

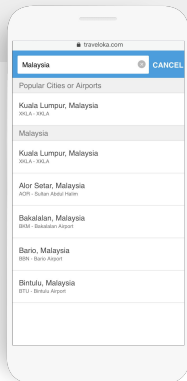


Take a look at how the leading travel brands in your region are doing so well



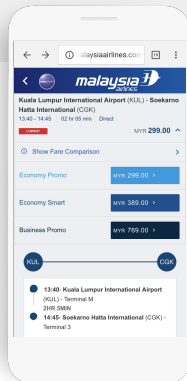
FINDABILITY

Traveloka provides suggestions for popular searches and allows users to search both by both country and city, so they do not miss out on options.



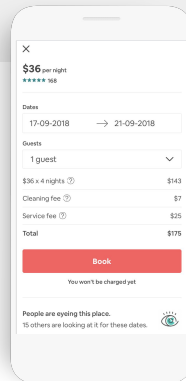
PRODUCT PAGES

Malaysia Airlines makes it painless to compare flights, by displaying what is most important first while keeping other information easily accessible.



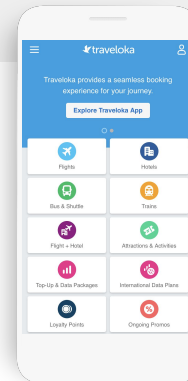
REGISTRATION AND CONVERSION

Airbnb provides the final cost and breakdown upfront, so customers can make purchase decisions with confidence and without price shocks.



MOBILE DESIGN

Traveloka uses a clearly labelled icons and appropriately sized buttons for its services to get users where they want to go with minimal fuss.



HOW TO BE A MOBILE MASTER



Our top recommendations for travel sites across 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.



69% of sites surveyed 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 they see unexpected search results.



51% of sites surveyed can improve **mobile design** this way:

Ensure that phone numbers are tappable to make calls

When phone numbers are not tappable, potential customers have to leave the browser and go through a troublesome and multi-step process to contact support. With less tech-savvy users, this can be even more of a challenge.

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 April 7 - August 30, 2018. Speed measurements were conducted between July 16 - July 25, 2018.

APPENDIX: COUNTRY BENCHMARK

MOBILE MASTERS: SINGAPORE



FINANCIAL SERVICES

1	NTUC Income	83%
2	POSB Bank	82%
3	Phillip Securities	82%

68%
Industry Average



RETAIL AND COMMERCE

1	iHerb	89%
2	Qoo10	88%
3	Amazon	87%

76%
Industry Average



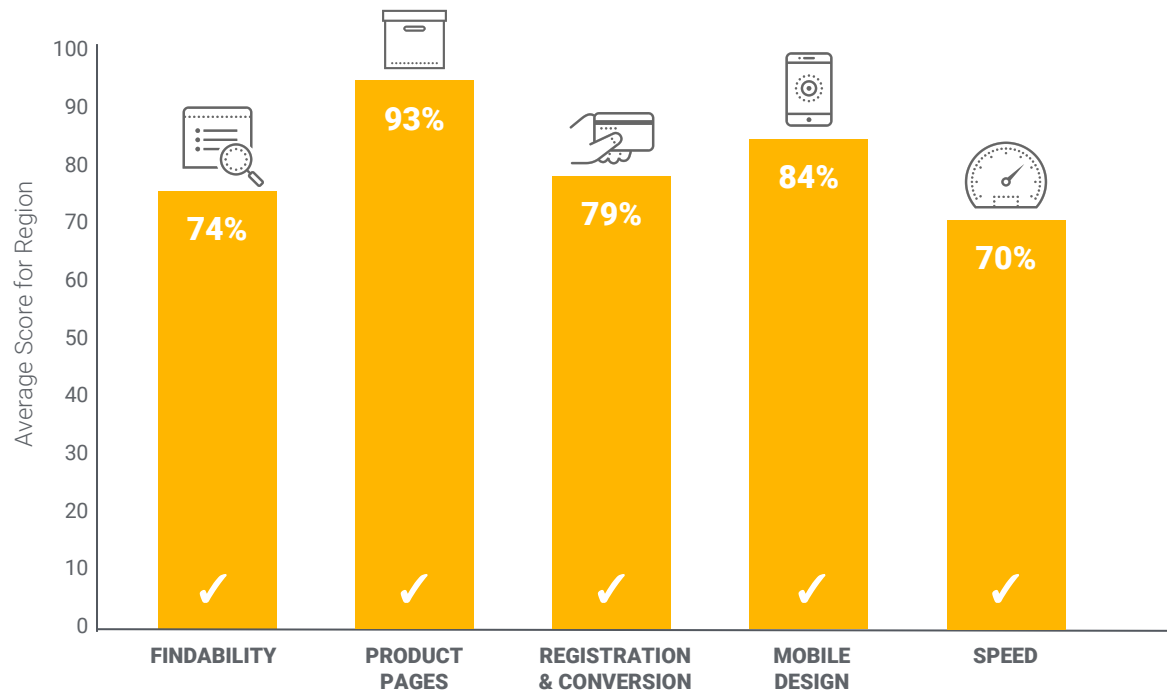
TRAVEL

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

74%
Industry Average

APPENDIX: COUNTRY OVERVIEW

SINGAPORE



APPENDIX: COUNTRY BENCHMARK

MOBILE MASTERS: MALAYSIA



FINANCIAL SERVICES

1	Maybank	77%
2	Hong Leong Bank	71%
No further brands scoring above 70%		

56%
Industry Average



RETAIL AND COMMERCE

1	Shopee*	78%
2	Lazada*	77%
3	11STREET	73%

65%
Industry Average



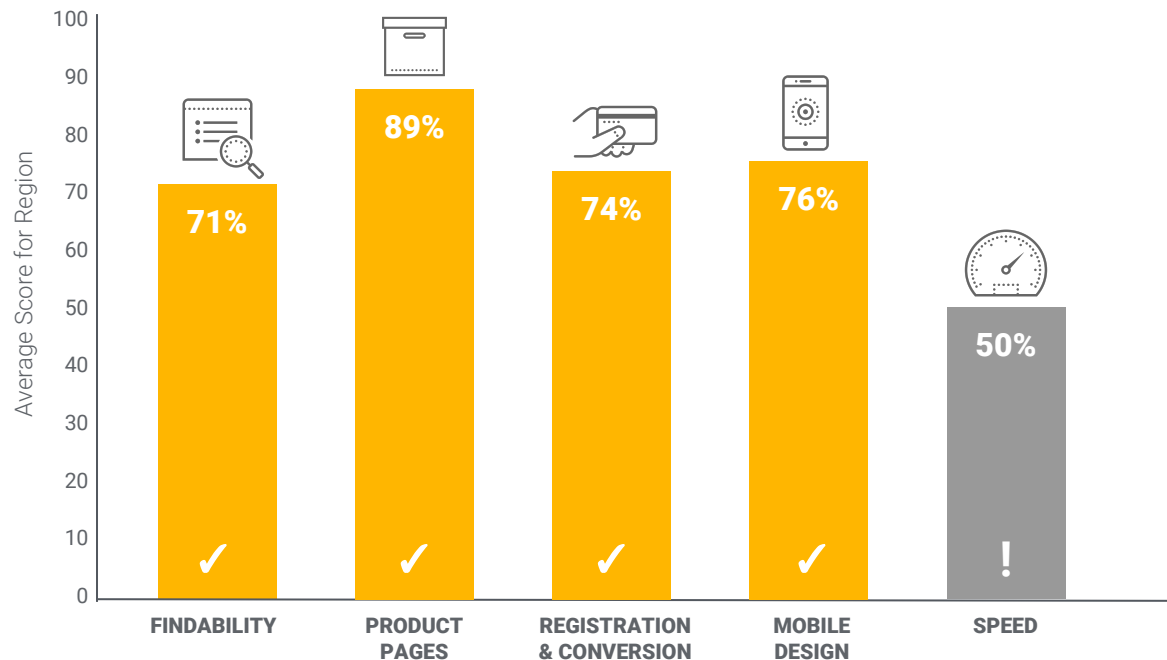
TRAVEL

1	Expedia*	88%
2	Traveloka*	84%
3	Easybook	80%

74%
Industry Average

APPENDIX: COUNTRY OVERVIEW

MALAYSIA



APPENDIX: COUNTRY BENCHMARK

MOBILE MASTERS: THAILAND



FINANCIAL SERVICES

1	AEON	86%
2	Citibank	77%
3	KTC	74%

70%
Industry Average



RETAIL AND COMMERCE

1	Amazon*	87%
2	eBay	82%
3	Lazada*	80%

73%
Industry Average



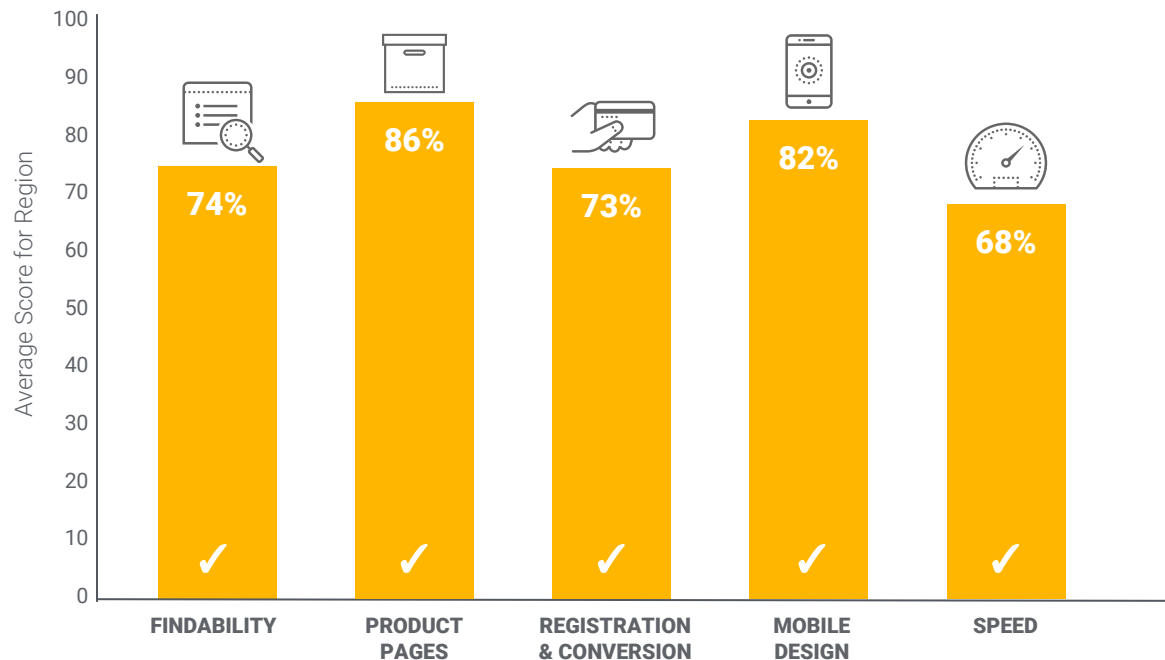
TRAVEL

1	Hotels.com*	86%
2	Expedia*	86%
3	Traveloka*	83%

69%
Industry Average

APPENDIX: COUNTRY OVERVIEW

THAILAND



APPENDIX: COUNTRY BENCHMARK

MOBILE MASTERS: VIETNAM



FINANCIAL SERVICES

Financial service sites were not assessed in this country.



RETAIL AND COMMERCE

1	Thegioididong.com	89%
2	Điện máy Xanh	87%
3	Amazon	87%

74%
Industry Average



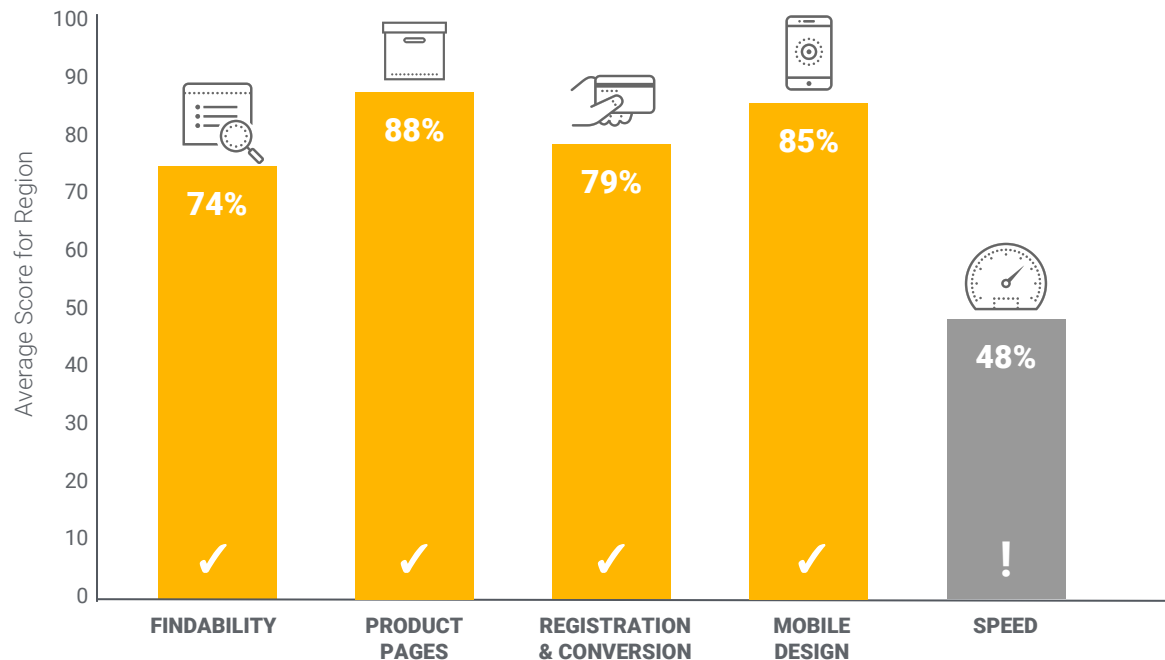
TRAVEL

1	Expedia*	88%
2	Traveloka*	78%
3	Mytour	75%

70%
Industry Average

APPENDIX: COUNTRY OVERVIEW

VIETNAM



APPENDIX: COUNTRY BENCHMARK

MOBILE MASTERS: INDONESIA



FINANCIAL SERVICES

Financial service sites were not assessed in this country.



RETAIL AND COMMERCE

1	Qoo10	89%
2	Bhinneka.Com	87%
3	Amazon*	86%

77%
Industry Average



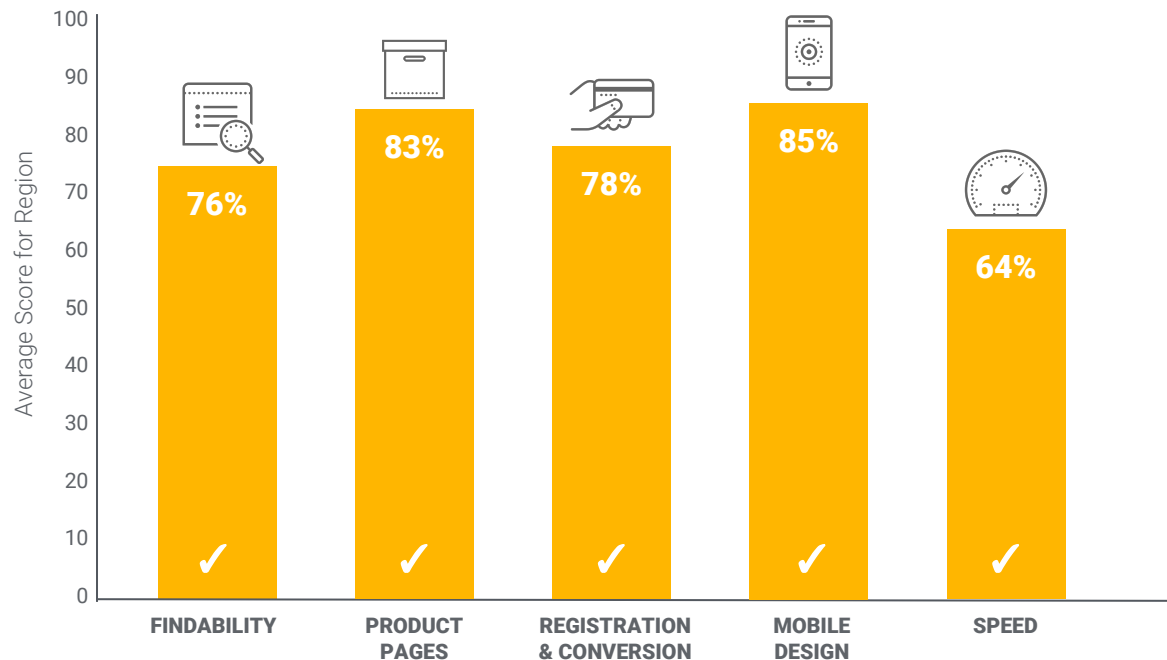
TRAVEL

1	Traveloka	84%
2	Booking.com*	82%
3	Airy Rooms	80%

68%
Industry Average

APPENDIX: COUNTRY OVERVIEW

INDONESIA



APPENDIX: COUNTRY BENCHMARK

MOBILE MASTERS: PHILIPPINES



FINANCIAL SERVICES

Financial service sites were not assessed in this country.



RETAIL AND COMMERCE

1	Amazon*	87%
2	Apple*	80%
3	Globe*	80%

69%
Industry Average



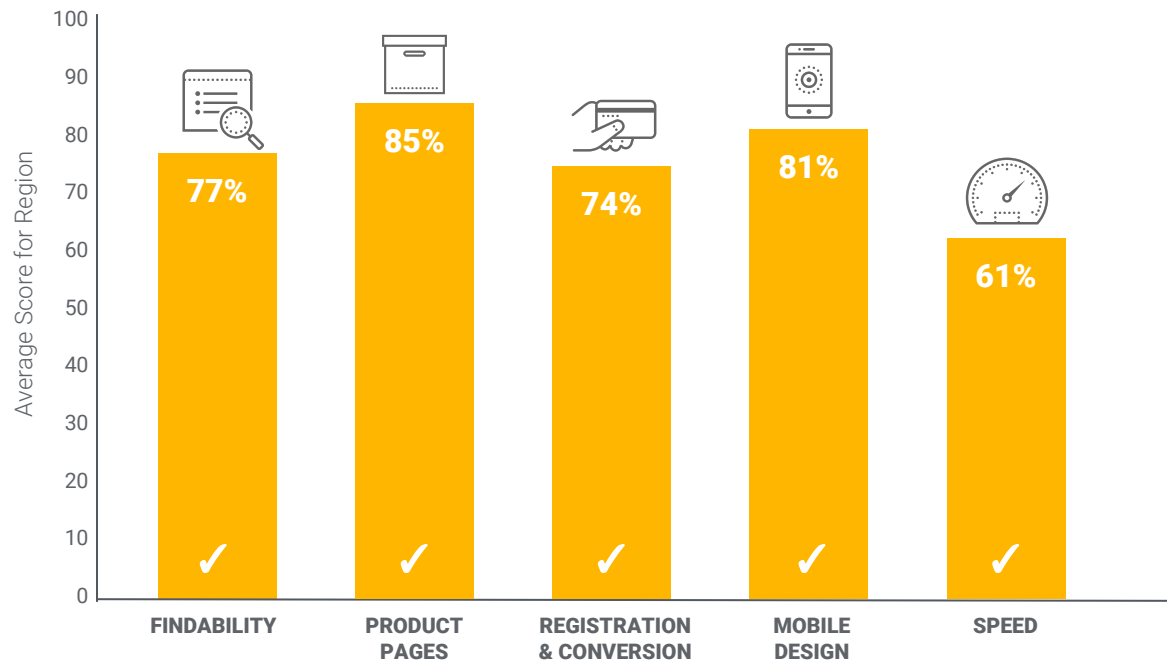
TRAVEL

1	Hotels.com*	88%
2	Travelbook	83%
3	Booking.com*	82%

71%
Industry Average

APPENDIX: COUNTRY OVERVIEW

PHILIPPINES



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