



Meet the mobile masters

People increasingly expect mobile sites to be fast and easy to use. To help brands understand the best examples of mobile site usability and speed, **Google has reviewed 460 of the most trafficked Travel, Retail, and Finance sites** (*SimilarWeb*) across fifteen EMEA countries to determine who has mastered mobile and who still needs to improve. Here we summarise the findings for the Netherlands.

Average usability score

NL Retail

66%
NL average
1st out of 12 countries

Top performing country
Netherlands 66%

Top NL performers

CoolBlue 80%
Apple 76%
deBijenkorf 74%

NL Travel

73%
NL average
2nd out of 11 countries

Top performing country
France 75%

Top NL performers

Booking.com 86%
NS International 84%
Hotel Specials 80%
KLM 80%

NL Finance

76%
NL average
1st out of 10 countries

Top performing country
Netherlands 76%

Top NL performers

SNS Bank 85%
Alex 85%
Nationale-Nederlanden 85%



87%
Access the internet
by smartphone



70%
Use smartphone equal
to or more than tablet
or desktop for internet



28%
Try another website on
their smartphone if
usability is poor

Google worked in partnership with lead UX agency cxpartners and local agency ISM eCompany to review website experiences against a set of vertical-specific and locally-relevant usability best practices, developed especially for this project. Website speed was audited using Google's 'Lighthouse' testing tool.



NL retail usability benchmark

People increasingly expect mobile sites to be fast and easy to use. The 20 most trafficked retail websites in the Netherlands* were reviewed for their usability (including speed) and the top 10 scoring sites are summarised here.

Top 10 Retail brands

Coolblue	1	80%
Apple	2	76%
de Bijenkorf	3	74%
eBay**	4	73%
Gamma	5	71%
Zalando**	6	70%
bol.com	7	69%
Media Markt	8=	68%
AH	8=	68%
Beslist	10=	67%



Mobile visits have grown steadily during the past year to reach more than 50% of total traffic. Hence, improving the mobile site has been a focus of our UX and web development teams. Speed improved by 30%. The checkout process has been improved and we avoid asking unnecessary and time-consuming information. On the other hand, we look at the way pages are built and the work on the infrastructure is still ongoing.

Yannick Bouillon - CMO, Vanden Borre (BE)

Best in class usability

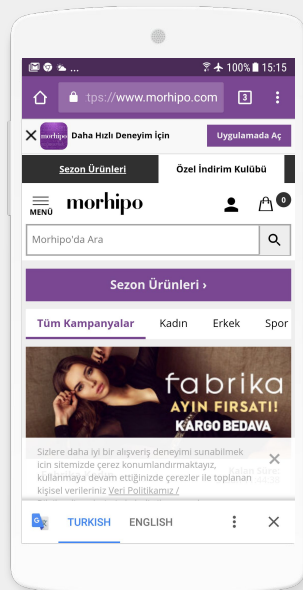
- Findability: Coolblue - 93%
- Product pages: Coolblue - 92%
- Registration & conversion: de Bijenkorf - 95%
- Mobile design: Zalando & Gamma - 100%

* See Appendix for how brands were selected

** Usability scores for some international brands have been taken from website reviews performed in another country

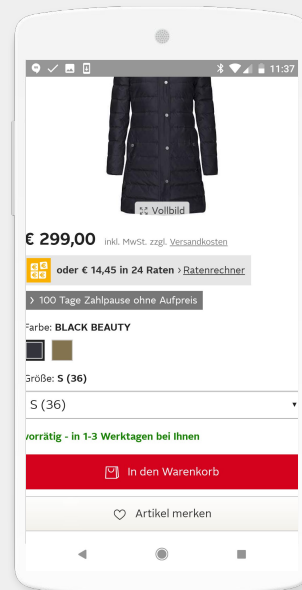
Leading brands illustration

Take a look at what the leading retail brands across EMEA are doing so well.



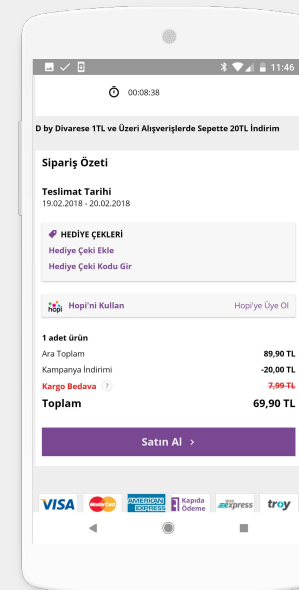
Findability (14/14)

morhipo.com (TR) offer excellent findability with autocomplete, spell correct and good next step guidance. Search results are easy to scan and helpful filtering is prominent and well designed.



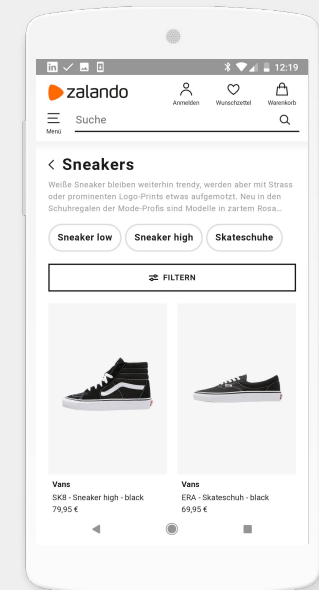
Product pages (13/13)

otto.de (DE) offer all the necessary information in a clear and concise way. Colour variants are shown, sold out sizes can not be selected in the menu, and items can be added to a guest wishlist.



Conversion (19/19)

morhipo.com (TR) provide an excellent guest checkout with a clear breakdown of costs illustrating savings made and real time error messages to guide users in the form fields.



Mobile design (14/14)

zalando.de (DE) have excellent mobile design with clear headings, well laid out content, good sized touch targets and clearly labelled icons.



NL travel usability benchmark

People increasingly expect mobile sites to be fast and easy to use. The 20 most trafficked travel websites in the Netherlands* were reviewed for their usability (including speed) and the top 10 scoring sites are summarised here.

Top 10 Travel brands

Booking.com	1	86%
NS International	2	84%
HotelSpecials	3=	80%
KLM	3=	80%
Easyjet**	5	78%
Kras	6=	77%
Landal	6=	77%
Corendon	6=	77%
TravelBird	9	76%
Roompot	10=	75%



Our customers expect an awesome mobile experience from us so mobile is where our attention lies

Vanja Mlaco - Lead CRO Transavia (Air France KLM Group)

Best in class usability

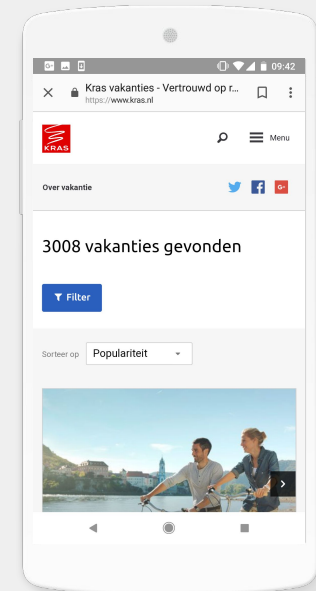
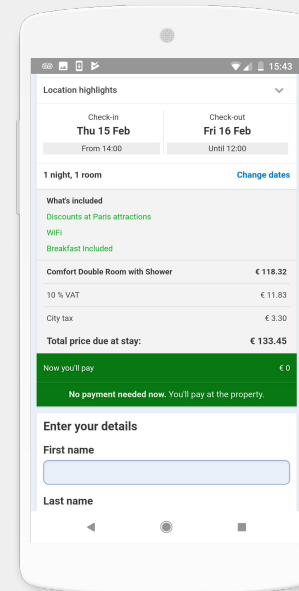
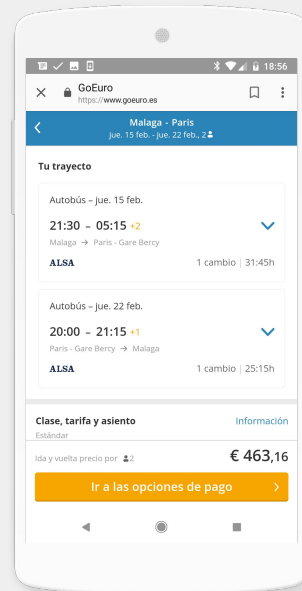
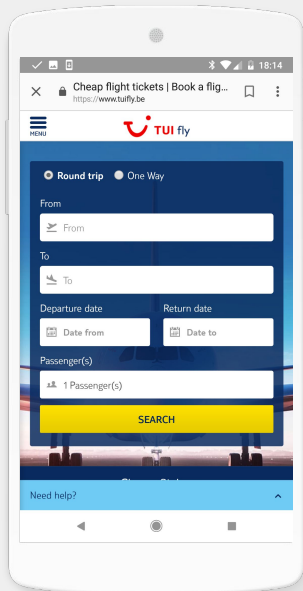
- 🔍 Findability: KLM - 94%
- 📄 Product pages: Booking.com - 91%
- 📝 Registration & conversion: Booking.com - 95%
- 📱 Mobile design: Kras & Corendon - 100%

* See Appendix for how brands were selected

** Usability scores for some international brands have been taken from website reviews performed in another country

Leading brands illustration

Take a look at what the leading travel brands across EMEA are doing so well.



Findability (17/17)

tuifly.be (BE) use a strong search design pattern with autofill for locations and a calendar which defaults to return dates once an outbound date has been selected.

Product pages (11/11)

goeuro.es (ES) have product pages that follow the same pattern and provide all the necessary information. The main call to action is prominent and stays at the bottom of the screen.

Conversion (18/19)

booking.com (NL) display the full price as soon as possible and throughout the checkout. A progress bar is prominent and users can navigate back and forth without losing details.

Mobile design (13/14)

kras.nl (NL) have excellent mobile design with clear headings, well laid out content, good sized touch targets and clearly labelled icons.



NL finance usability benchmark

People increasingly expect mobile sites to be fast and easy to use. The 20 most trafficked financial services websites in the Netherlands* were reviewed for their usability (including speed) and the top 10 scoring sites are summarised here.

Top 10 financial services brands



Being mobile is being accessible. Inherently the web is an accessible place, but we tend to impose it with many constraints. In my view, our mobile journey is a journey toward becoming increasingly agnostic about devices and screen sizes, making our products and services accessible everywhere at any time

Claus Stadel- Senior UX designer, Jyske Bank A/S (DK)

Best in class usability

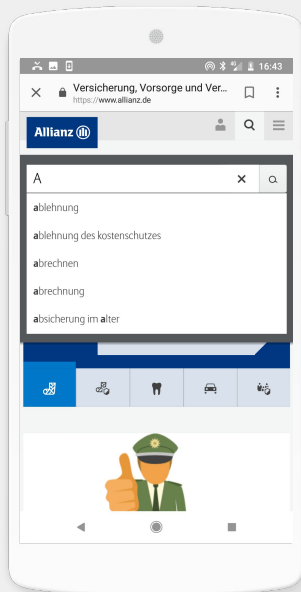
- Findability: Alex - 100%
- Product pages: Nationale-Nederlanden - 100%
- Registration & conversion: Ohra - 91%
- Mobile design: SNS Bank - 100%

* See Appendix for how brands were selected



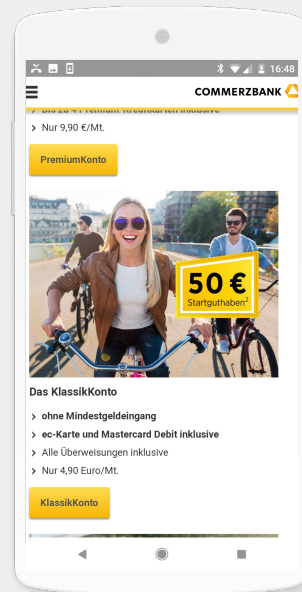
Leading brands illustration

Take a look at what the leading financial services brands across EMEA are doing so well.



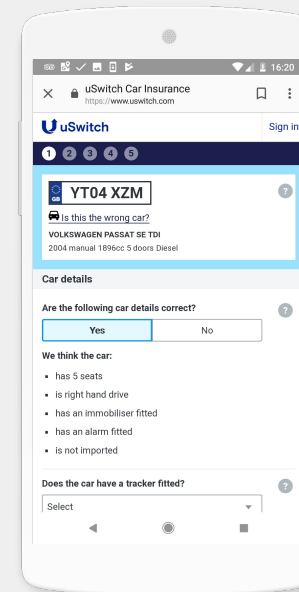
Findability (12/12)

allianz.de (DE) present key actions clearly on the homepage and group products in an intuitive way. Users are also supported with search autocomplete and spelling correction.



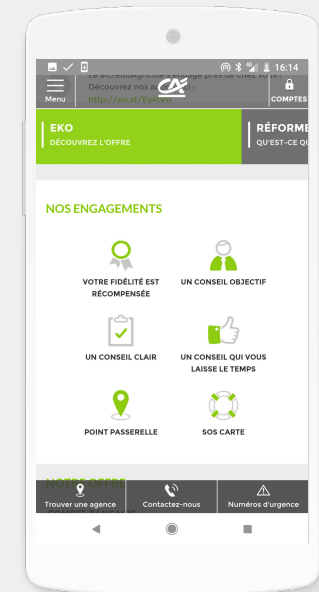
Product pages (5/5)

commerzbank.de (DE) present key product information in a clear and scannable way with prominent calls to action. Compelling high quality images are also used well.



Conversion (11/11)

uswitch.com (UK) clearly explain why key information is required in the application form and display errors in real time. Users can return to the previous step without losing pre-filled data.



Mobile design (12/12)

credit-agricole.fr (FR) have excellent mobile design with clear headings, well laid out content, good sized touch targets and clearly labelled icons.



Next steps

Could your mobile site be better? Are you interested in how leading brands are doing it? Hopefully these resources will help.

How do you compare?

[Use our Heuristic framework to assess your own site](#)

Lighthouse Test Conditions

[Replicate the speed test on your own site](#)

Need inspiration & guidance?

[View our Best practice archive for inspiration, illustration & guidance](#)



How Primera reduced page load times by 362% resulting in a 10% drop in bounce rate and a 4% increase in conversion rate for their mobile site.

‘For us, each optimisation has a small impact and it’s the sum of all the improvements together that really makes the difference.’

[SEE RETAIL CASE STUDY](#)



How finance aggregator money.co.uk improved site speed and applied space saving design and UX to lower their load times significantly and lower bounce rate by 52%.

‘To simplify means to eliminate the unnecessary so that the necessary may speak.’

[SEE FINANCE CASE STUDY](#)



With Google Optimize 360 Transavia cut mobile homepage bounce rate by 77%, reduced time spent on analysis by 70%, and achieved a 5% higher conversion rate on mobile.

‘Our customers expect an awesome mobile experience from us so mobile is where our attention lies.’

[SEE TRAVEL CASE STUDY](#)



EMEA top brand performers

These are the top 10 performers for each vertical from across all the sites tested in the study

Retail

1	Coolblue* (BE)	83%
2=	Bokus (SE)	78%
2=	Coop (DK)	78%
2=	Leroy Merlin* (FR)	78%
5=	GittiGidiyor (TR)	77%
5=	Litres (RU)	77%
5=	Namshi (AE/SA)	77%
5=	NetOnNet (SE)	77%
9=	Apple** (NL)	76%
9=	Morhipo** (TR)	76%
11-60		71%
61-181		67%

Travel

1	Booking.com* (DE)	88%
2	Swebus (SE)	87%
3	Saudia (AE/SA)	86%
4	SAS (SE)	85%
5=	Etstur (TR)	84%
5=	Kayak* (ES)	84%
5=	Lufthansa (DE)	84%
5=	NS International (NL)	84%
9=	Air France** (FR)	83%
9=	Lastminute.com** (FR)	83%
11-60		78.5%
61-122		68%

Finance

1	Bank Norwegian (NO)	96%
2	Garanti (TR)	91%
3=	AIG (IL)	89%
3=	Linea Directa (ES)	89%
3=	Storebrand (NO)	89%
6=	Crédit Agricole (FR)	87%
6=	Confused.com (UK)	87%
8	SBAB (SE)	86%
9=	SNS Bank** (NL)	85%
9=	Nationale-Nederlanden** (NL)	85%
11-60		80.5%
61-160		63.5%

*Where the same brand trades in multiple countries, we used the score from the country where they got their best overall score (including speed).

**Where large numbers of sites share the same score, local sites are prioritised and shown

Methodology, score calculation and brand selection

Custom usability heuristics

A custom set of heuristics (best practices) were developed for the evaluation of mobile websites within specific verticals. These were originally derived from a large scale mobile website usability evaluation led by Jenny Gove for Google in 2014.

Feedback from applying this framework in the 2016 Mobile UX report led to a more 'vertical specific' approach in 2017, with custom sets being developed for retail, travel and finance.

User journeys to review and compare

An appropriate user journey was provided to establish the reason a customer would use the site, detailing:

- Context of completing the task
- Reason they were performing that task
- Task for the user to complete

Speed metrics

Google's Lighthouse browser automation tool

was used to conduct synthetic testing of website speed on WiFi. Lighthouse measures the following metrics to determine website speed:

- First meaningful paint
- First interactive (beta)
- Consistently interactive (beta)
- Perceptual Speed Index
- Estimated Input Latency

Score calculation

Of the overall score, 70% is derived from vertical specific usability heuristics and 30% from site speed. While the heuristics have been broken into categories for ease of digestion, the score is based on the total result across all categories.

Brand selection

Brands were selected based on data provided by [SimilarWeb](#) which identified the most visited websites in each country in the year up to 30th September 2017. 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 journey online on that site - including quotes from financial aggregators)

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. Meta-search engines which drive conversions on other sites
3. Branding sites where the bulk of visits are for non-transactional purposes
4. Local transit sites for commuters

Cover slide statistics

www.consumerbarometer.com



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