### For informed direction

eDigitalResearch

App Benchmark Study

Issue 2 October 2011





### App Benchmark introduction



The continued development of smart devices is facilitating a major change in consumer behaviour as we begin to witness the dawn of MEcommerce; a shopping revolution where the customer now has the power to shop when, where and how they want.

Our recent UK consumer research shows that 35% of all smart phone users already shop using their phones and 20% more intend to do so in the next year, reinforcing the importance of mobile applications to retailers, service providers and brands alike as yet another communication channel with consumers.

In April 2011 eDigitalResearch released the first comprehensive App benchmark study, to provide the insight and guidance for UK brands as they continue to take steps towards a full mobile offering.

Since the first study Android has overtaken Apple as the fastest growing App marketplace. However, this study looks exclusively at Apps available on Apple devices to allow comparison with the first study.

This is the second study of it's kind, benchmarking the customer journey of almost 70 of the leading Apps with UK consumers from eight different sectors, including the retail, travel and media industries.

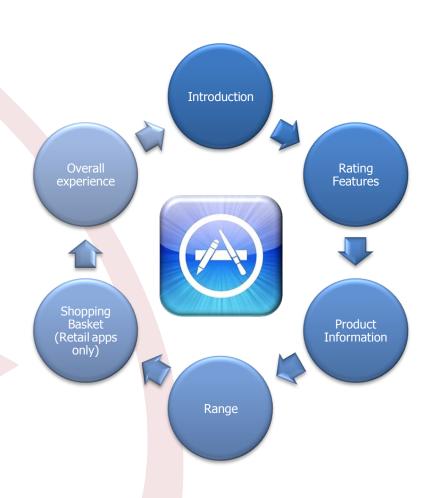
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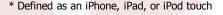
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### App Benchmark methodology

- An eMysteryShopper survey was conducted to compare the customer journey across 67 of the UK's most popular Apps via an Apple smart device\*.
- For each App, 20 surveys were completed by a panel of UK online shoppers.
- Depending on the nature of the App, each surveyor looked in detail at a combination of the following sections:
  - Introduction
  - Rating features
  - Product information
  - Range
  - Shopping basket
  - Overall experience
- Fieldwork was carried using a panel of UK eMysteryShoppers during August and September 2011.







### 'Norms' - allowing quantifiable benchmarking

### Openitions:

- **Excellent** Exceeds expectations at least as good as the internet best sites Special features that have surprised and delighted. 90%+ compares to top ecommerce sites.
- ➤ **Good** Just on par with other internet sites Elements are okay A reasonable experience but nothing special . Below 85% may also need attention.
- > **Average** mostly understood but not on par with the best should be investigated and has issues that require review.
- **Poor** Not available or not useful and difficult to follow. Difficult to use. Slow and contains mistakes. Will be adversely affecting user experience.
- **Very Poor** Did not work or has serious errors. Requires urgent attention if available.

### Scoring:

> The percentage score is calculated by taking the score given by surveyors for each question and dividing by the total possible amount for each question.

	Excellent	Good	Average	Poor	Very Poor
Benchmarking					
Score (approx)	90% or more	80%-89.9%	70%-79.9%	50%-69.9%	Less than 50%

### Technical Issues

Because of the nature of the way our technical issues are rated, 0% is actually the top score as this indicates 0% of respondents experienced technical issues, so the percentages for this category will be labeled in reverse for the colours (i.e. 0-10% would be excellent, 10.1-20% would be good etc).



### 67 Apps benchmarked across UK industries



















### Overall Key Findings

- Search and Find Travel Apps are the top performing sector achieving the highest average satisfaction rating of 83.3%. However the overall top scoring App in the entire study was Amazon scoring an excellent score of 90.0%.
  - Top performing Apps were found to be easy to use and navigate.
  - They also often provided clearly laid out information that was relevant and detailed, but also in easy to digest chunks.
- Food and Drink are the lowest performing category overall scoring an average satisfaction score of 73.0%.
  - Users often found the Apps were slow to load and only offered limited capabilities and information.
  - The Apps that performed particularly poorly were those that were difficult to navigate, took people to other apps/websites and were completely different to the company's website all leading to a less cohesive user journey.
  - In some cases users were unsure why the App even existed, finding key features were missing and unable to find a fit purpose for the App.
- © Consumers expect to have a wide range of products and information available to them through the App, and would not expect this to be less than what is available through the company's website.
- Users expect the App to reflect the company website still offering detailed information, but in easier to view and digest chunks.
- © Consumers expect functionality to remain on par with company website such as the ability to book tickets, check in, order food and find directions.
- Using mobile phone features such as location services is seen favourably by respondents, but they do not expect to have to go out of the app to turn this functionality on themselves.
- We generally see the Apps that met customer expectations 100% performed best for overall satisfaction as well as for recommendation.



### Benchmark comparison

**Industry Comparison High & Low Satisfaction Scores** 

**Average Overall** Satisfaction for the entire App benchmark study is **78.5%**.

















Search and find-Travel 83.3%

Hotels 81.0%

Retail 80.5%

Search and find 80.3%

Home Services 77.3%

News and Media 77.1%

**Flights** 75.4%

Food and Drink 73.0%

















Apps Surveyed: 5 respondents already had the app: 9.0%



Apps Surveyed: 9 % of respondents already had the app: 20.6%

Apps Surveved: 11 % of respondents already had the app: 17.1%

Apps Surveved: 10 respondents already had the app: 20%

Apps Surveved: 11 % of respondents already had the app: 14.5%

Apps Surveved: % of respondents already had the app: 2.5%

Apps Surveyed: 11 respondents already had the app: 7.1%



## Using the richness of the verbatim we can gain a deeper understanding of what makes a top performing app

Search and find-Travel



- The map feature on this App was both easy to use and accurate.
- The App offered a good level of detail on the returned results included contact information, prices and opening hours.

Hotels



- Booking via this App was simple and straightforward to do.
- This App contained a wide range of features to satisfy user's needs.
- A good level of detail was offered in this App.

Search and find



- Very easy to use with accurate location based results.
- Users found their results being saved to history so they were easy to find.
- Images and layout used made the App both clear and fun feeling.

Retail



- This App had the same functionality and range of products and information as the website such as customer reviews which assisted users to make informed purchase decisions.
- Overall easy to use, including the barcode feature and adding items to the basket.

**Home Services** 



- Attractive layout and design with coloured drawing was refreshing for users.
- Simplicity users found it easy to navigate and enter meter reading into this App.
- Users enjoyed extras such as games and energy saving tips.

News and Media



- There is a large range of information available through this App.
- This App had clear categories and headlines and top stories were made clear to users.
- Users appreciated the up to date content and option to view live TV.

Flights



- A good looking App with a wide range of rich content and options available.
- Easy to make booking and check in via this App.
- People enjoyed the additional option to download aircraft images.

Food and Drink



- Users liked the way it surprised and delighted them with the pizza slot machine feature.
- It was very easy to use and was just as easy to order a pizza through it.
- Good quality images, clear information and easy to navigate.

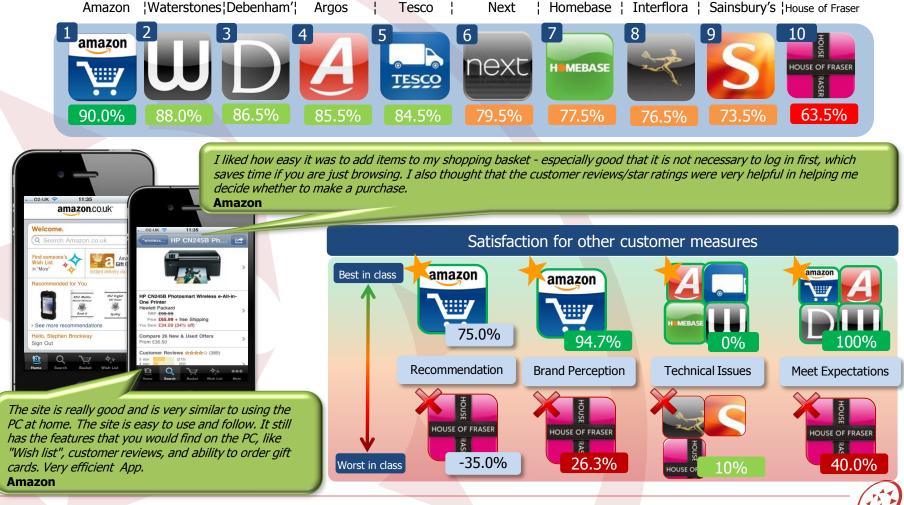


### Retail





### App Benchmark – Retail



**Overall Satisfaction** 



### Good points - Retail

Amazon topped the overall league table for the entire study with an easy to use App that contained relevant product information, including customer reviews, was transactional and mirrored the company's website.







It is just like their website, but in some ways easier to manipulate on the App, e.g. the shopping basket. I liked the simplicity of it and ease of use.

Amazon

The App looked good and was very easy to use. It offered me the ability to shop online, as well as many features, such as the current special offers and new releases. I could access my account on this App, as well as being able to see what the stock levels were on products, and their ratings from other customers.

**Waterstones** 

Very easy to use. If the wrong icon was pressed, it was easy to go back to where you were before making the error, by pressing home.

**Argos** 

- Top apps are fully transactional, offering users the same product ranges as online.
- Top apps have similar visual style to their website counterparts, helping to increase consumer confidence when shopping and browsing across new channels.
- It is important that it is very clear from the outset how to use the App and navigate between product categories and sections easily.
- Product information is reduced for usability purposes, but users find there is still enough information to be useful.



### Pitfalls – Retail

House of Fraser's Gift Finder App cam bottom in the overall league table as shoppers became increasingly confused by the limited range and functionality (such as not being able to search for items), and reinforces the notion that users prefer retail apps that are transactional.





The description of products is very brief, and there is no search function. This implies that this App is predominantly for finding gifts and not general shopping.

**House of Fraser** 

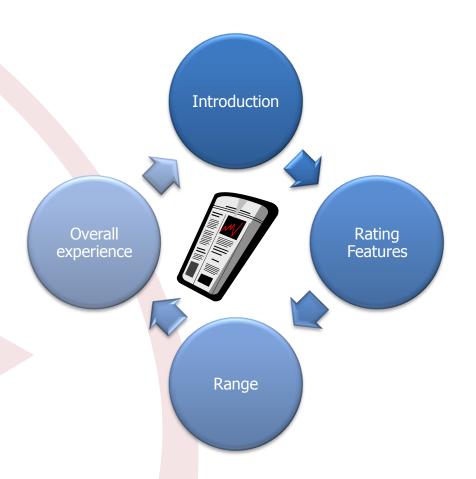
I found this App quite confusing. I wasn't sure whether I could, or could not, purchase items online via the mobile device, or whether it was simply directing me to their website. I found navigating the site very difficult, and I didn't find it enjoyable or easy to browse.

Sainsburys

- There was a general feeling among customers that retailers should only release an App if purchases can be made through it.
- Some Apps appear to show a smaller range on the App than on their websites and stores, which some customers disliked.
- Some Apps were not seen to have retained enough product information as the brand's website.
- Customers getting easily lost in some Apps, not being able to go back to a previous page or viewing the basket were a big turn off.



### **News and Media**





### **App** Benchmark – News and Media

#### Overall Satisfaction







Live video news is very good on this App, as is the latest news.

Sky Sports News

I liked how the App was easy to navigate around. How the App offered live TV. There was a good choice of categories, and they were laid out excellently .

Sky Sports News

# Satisfaction for other customer measures Best in class Sky NEWS NT 70.0% Recommendation Brand Perception Technical Issues Meet Expectations







Worst in class

-40.0%

### Good points – News and Media

Sky Sports News was the top scoring App because users had the option to watch live TV, view live updates and found the App simple to use.







App is attractive and very interactive. Easy to use and catch live news while reading something else.

BBC News

The latest news is very up-to-date. The menu system is simple to browse through. The 'live' news feed is clear and of a good resolution.

**Sky News** 

It was simple to use the App - I could see the top stories clearly, and other sport categories were easy to find. The information was accurate and regularly updated. It was good to see the live TV and radio features.

**Sky Sports News** 

- Top scoring Apps provided high quality live video feeds, images and a wide range of content was available to users.
- Having Apps that have clear layouts, clear category labels and are easy to navigate enhances the user experience.
- Bringing consistently up-to-date news is key for Apps in this category.
- Other key features include user tutorials, the ability to view content offline and a variety of supporting photos with stories.



### Pitfalls – News and Media

Elle was the lowest scoring App in this sector due to its lack of content and confusing navigation system.







I found the design of the home page difficult to navigate, and the content of the entire app was very poor. Based on this experience, I would never use it again.

Elle

The latest top news story was updated an hour previously, which seems very old considering it was supposed to be a live feed. There was also no link to social networking, live news feed, or ability to submit news. I also found it very slow to load.

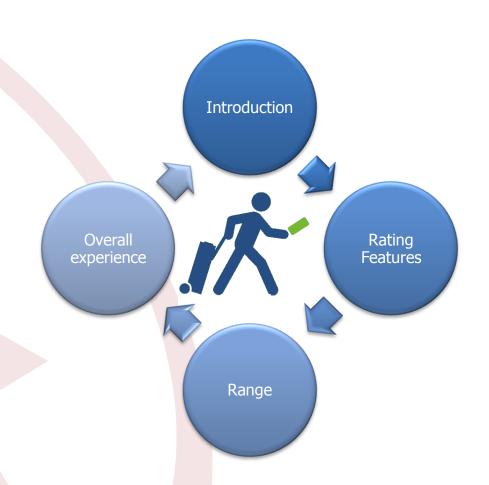
The Independent

Can look a bit amateurish.
The Sun (Biz)

- Low scoring Apps in this sector were difficult to navigate and didn't live up to their traditional channel counterparts.
- Low scoring apps also scored low on intuitiveness with Elle at 67.1% and the Sun (Biz) scoring 67.5% and were commented on as being 'amateurish'.



# Search & Find - Travel





### **App** Benchmark – Search and Find – Travel







The App is very easy and quick to use, and all the National Trust sites had very clear descriptions and photos.

**National Trust** 

The app is very comprehensive, easy to use, and offers everything you could possibly need. Details for locations are excellent - with hours, prices, contact details and directions. Superb App!

National Trust





### Good points - Search and Find - Travel

Overall National Trust were the winner for search and find travel because they have an easy to use App, that focused on people's current location to help give a more personalised app experience. The App was fun and interesting to use, with many features on it. I could search for local things going on in my area, and upcoming events.

**National Trust** 







Wasn't sure what to expect from this App, and wasn't sure what use it was actually going to be, but I was pleasantly surprised. I liked how the App showed all the National Trust places on a map and focused on my current location, so I could see the nearest places. Overall, the App worked well and contained just the right amount of information - it would definitely encourage me to visit a National Trust place.

**National Trust** 

I liked the 'near me' search, the information and tours offered, and the way you could personalise your account.

Viator

- Top scoring Apps were easy to use, with simple navigation and clear information.
- Users enjoyed the ability to book through the App and found this process easy to use in our top scoring Apps.
- All features to help personalise the experience were received well such as 'near me' location based searches and filters such as pet or family friendly.
- Users should be able to access exactly the same information on the App as they can on the webbsite.



### Pitfalls – Search and Find - Travel

Trip Advisor came bottom in this sector because it was slow to load, less easy to navigate and directed people to other locations outside of the App leading to an non-unified process.

The booking process takes me to a website-type page, which is very fiddly to browse and use. **Trip Advisor** 







I disliked that the App leads you to believe that you can make a reservation using it when, in fact, you can't. In order to make a reservation you have to download a second App.

Kayak

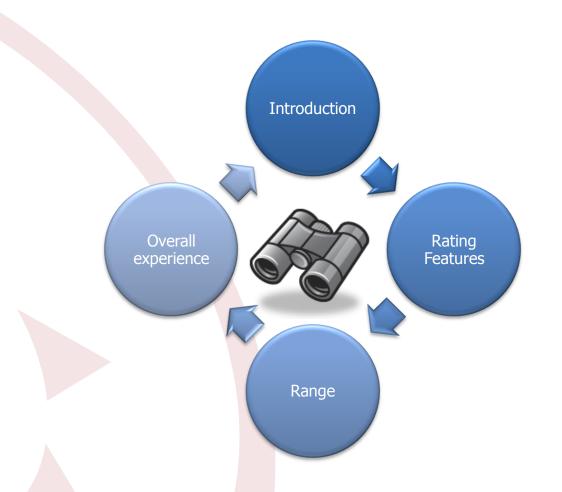
There could be a clearer help facility.

English Heritage

- Low scoring Apps were slower to load and unclear on how to navigate to certain areas.
- Misleading information and the inability to book through the App led to a frustrating user experience.
- A lack of information on these lower scoring Apps were a problem, including failure to find contact information and directions to the locations that they were showing.
- Being directed to a website/another App made the overall process more complex and less cohesive.



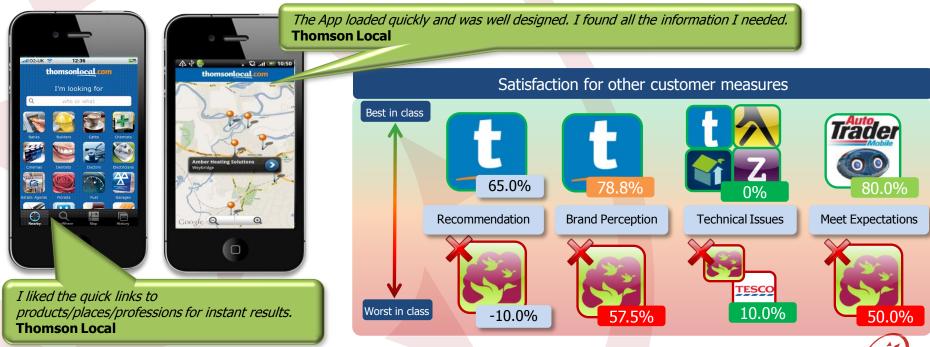
### **Search & Find**





### **App** Benchmark – Search and Find







### Good points – Search and Find

Thomson Local were our overall top scorers because of their clear categories, easy to use features and clear written and displayed information. I like that places that have been looked at on the App are saved in to the history section so that they're easy to find again. The main page makes it clear what categories of places can be found. It's easy to select a city/location where you want to search.

**Thomson Local** 







I found the App easy to use. Search results were returned relatively quickly and presented in a way that made them very easy to view on a mobile device. I felt the App had the full functionality of the main website - for example, in terms of filter options and property descriptions.

**Right Move** 

Very easy and intuitive to use, with searches very easy to complete, and result displayed in a way easy to understand. The map feature is very useful, as are the standard categories on the home page, e.g. taxis, pizza, pubs, etc.

Yell

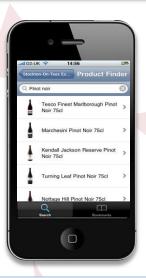
- Top scoring Apps provided were easy to use and delivered quick, but also accurate results.
- Allowing users to easily retrieve previous places/searches was a valued feature on the top scoring Apps.
- Clear information and relevant results are a must for Search and Find Apps.
- The same level of information should be available in the App as on the brand's website



### Pitfalls – Search and Find

Find A Property came low because of its small range of search options, unfavoured layout of results and larger number of click throughs to details of results.







It would be useful if there were more search options available, like number of bedrooms, budget etc. Also, there were not a lot of relevant results in my area. Find A Property

The App was quite time-consuming to use, and it did take a while to get used to. I feel the instructions could be clearer.

Tesco

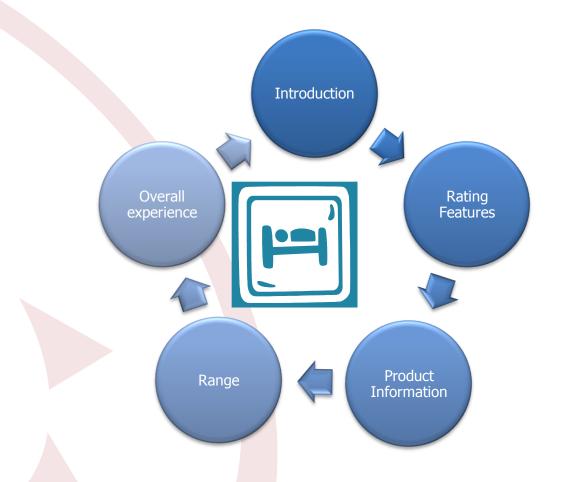
The length of time to load the results. Also, 2 houses on my road for sale don't show in the results. Not sure I trust it very much.

Zoopla

- The lower scoring Apps were slower to load than other Apps, and users experienced a larger amount of technical errors.
- Users don't want to use an App that is time consuming this experience can become lengthened when barcode scanners within the Apps don't appear to work correctly.
- There is also a trust issue with some of the lower scoring Apps people are unsure how up-to-date their results are and feel not all the available search results are being shown to them in some cases.



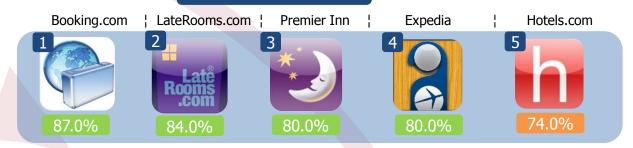
### **Travel - Hotels**





### **App** Benchmark – Hotels

### **Overall Satisfaction**







The App contained all the features you would need on a hotel booking App. It was quick and easy to use, without any technical issues. **Booking.com** 

Very easy to search and find suitable hotels. Also very quick to generate search results that were accurate. I also liked the hotel and location description. **Booking.com** 

# Satisfaction for other customer measures Best in class Best in class Recommendation Brand Perception Technical Issues Meet Expectations 10.0%



### Good points - Hotels

Booking.com came top overall for the Hotel sector as it worked equally as well as the company's website. People were happy to book through it and it generated accurate and detailed results.







I love the booking.com App and this is an App that I use frequently. This is how apps should be: a copy of the company's website.

**Booking.com** 

Very easy to search and find suitable hotels. Also very quick to generate search results that were accurate. I also liked the hotel and location description.

**Booking.com** 

The range available to view was good, I also appreciated the information that was available regarding facilities in the hotel and near it. This would be useful when making a booking decision.

Laterooms.com

- Top scoring Apps provided detailed and relevant searches, with ability to easily see hotel facilities.
- Detailed and applicable reviews, combined with clear information and photos enhance the user experience.
- The booking process on Apps should be similar to that on a brand's website.
- Extra features such as 'hotels near me', room availability checks and location guides were well received.



### Pitfalls – Hotels

A lack of contact information, photos and special deals placed Hotels.com at the bottom of the Hotel App category.







I couldn't find info on the area or whether conference facilities were provided.

Hotels.com

Although navigation was pretty easy, it did feel a bit slow and clunky.

Hotels.com

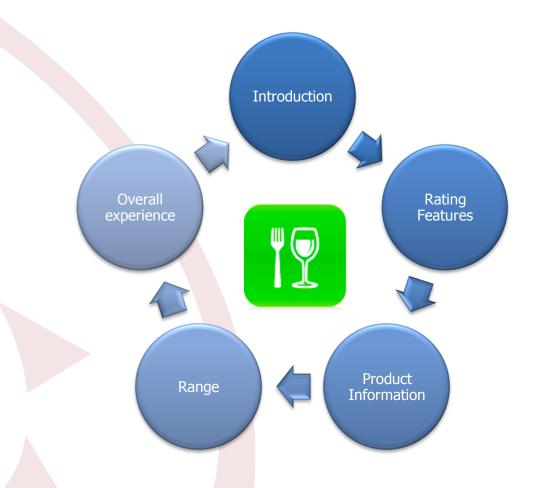
Most hotels only have one or two photos, I know from experience that more are displayed on Expedia's website.

**Expedia Hotels** 

- Bottom scoring Apps provided a lack of detailed information, such as standard hotel facilities.
- Users became increasing frustrated by a lack of search results, especially when they did not match the range available on the company's website.
- More clarity is needed in the booking process to ensure users know whether their booking is complete.
- It was noted a few times that users wished to see clear contact information on the Apps.



### **Food & Drink**





### **App** Benchmark – Food and Drink

### **Overall Satisfaction**









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### Good points – Food and Drink

Domino's was the top scoring App because it provided easy navigation, strong functionality and surprised and delighted surveyors with the additional Pizza Slot Machine feature.







I liked the menu information, and the fact that everything was priced. It was easy to make a booking, and I got an email confirmation straight away.

**Pizza Express** 

The app was easy to use, it looked very modern, and it had a good range of features on it. I liked how you could instantly get a voucher code and didn't have to print anything off to take with you to the restaurant.

Prezzo

I found it simple to look for restaurants and select the one I wanted to order from. I liked that a specific time could be selected, and it was easy to place an order.

Wagamama

- Top performing Apps were those that included the largest variety of features and functions.
- Users like the fact that they can browse menu options and locate their nearest restaurant but also want to be able to place an order, book a table or download voucher codes.
- Top scorers had modern and simple layouts that assisted in the easy navigation for users through the App.



### Pitfalls – Food and Drink

Shakeaway is badly designed with poor functionality. Surveyors found that key features were missing and features that did exist didn't always work correctly.







I dislike everything about the App. It's completely useless. The locator doesn't work. It's slow and got stuck everywhere. You can't order anything, you can just pick combinations. It doesn't satisfy to be an App, should be able to do something at least, not just sit there and look pretty.

**Shakeaway** 

I was disappointed that the application was very slow to load, and that there were no prices shown.

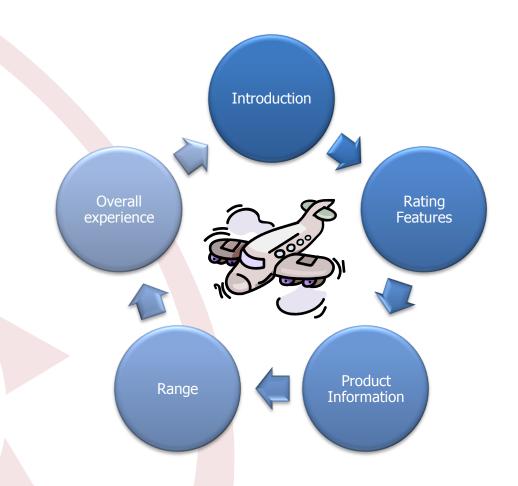
**McDonalds** 

I know that KFC doesn't deliver, but at least one should be able to make an order for collection. It doesn't even have prices of the items so one can make an estimate of cost. It's quite a waste of money. Other Apps having more functions come free, it's a shame this one comes at a price and doesn't offer half as much. Apart from nutritional information, which is outstanding, it doesn't offer much. **KFC** 

- Losing Apps in this category were slow loading and had a high number of technical issues.
- A disappointing lack of information and offers on some Apps is what really let users down, it gave a sense that there wasn't much point to the App.
- It seemed users were disappointed if they could not order food through the App (where applicable), and felt if this feature was unavailable there wasn't much more you could do.



### **Travel -Flights**





### **App** Benchmark – Flights

### Overall Satisfaction





A nicely designed App that is easy to navigate and simple to browse. I felt it offered everything I would need to check and manage a flight. **Lufthansa**  The features on the App are very good, and there is a large range. It's easy to see how to make a booking, check flights, check in etc. **Lufthansa** 

### Satisfaction for other customer measures Best in class

78.9%



atlantic

0%



62.5%

**Meet Expectations** 



Worst in class

30.0%

-20.0%

Recommendation

### Good points – Flights

Lufthansa was the winning App in this category as it was easy to use, gave a suitable amount of information and check in/booking features were simple to use.







The App was easy to use and made good use of the iPhone technology.

Lufthansa

There is a large range of features available on this App, and they're all easy to use. It's clear how to make a booking, check a booking and log in to your account. It's also possible to get flight information.

**KLM** 

The App looks really good and works really well on my phone. The app contains plenty of content, which is both helpful and informative. The App is very simple to navigate.

**American Airlines** 

- Top scoring Apps were easy to use and navigate, and were aesthetically pleasing with a simple layout.
- Quick loading pages and a smooth browsing process made the overall user experience more efficient and unified.
- Users trust they can complete important flight processes, including booking and check in, successfully on these top Apps.



### Pitfalls – Flights

Air France were the lowest performers with their App because it was difficult to navigate, dull, lacked key features and had some technical issues.







I was disappointed that there did not seem to be the ability to book flights from within the application.

British Airways

I found it quite difficult to initially navigate through the app. It is a very "dry" App, with a lack of colour and visuals.

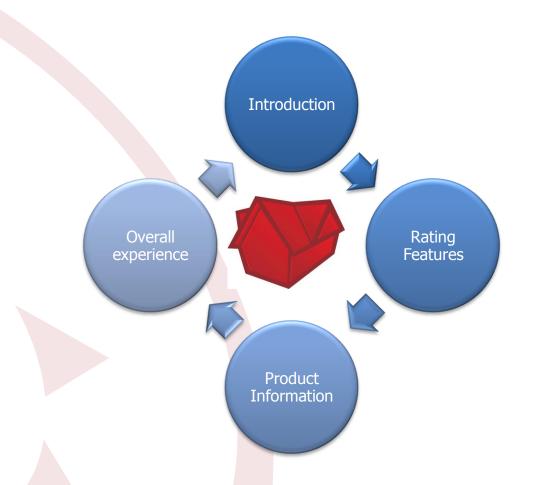
**Air France** 

It would be better if you could make a booking through the app.
Virgin Atlantic

- Lower scoring Apps were slower to load and generally more difficult to navigate.
- Having more special offers and promotions could help improve these Apps.
- To improve user experience these Apps need more features available such as flight bookings and check in.
- It was noted that these Apps had more boring layouts, and it put people off using the Apps.

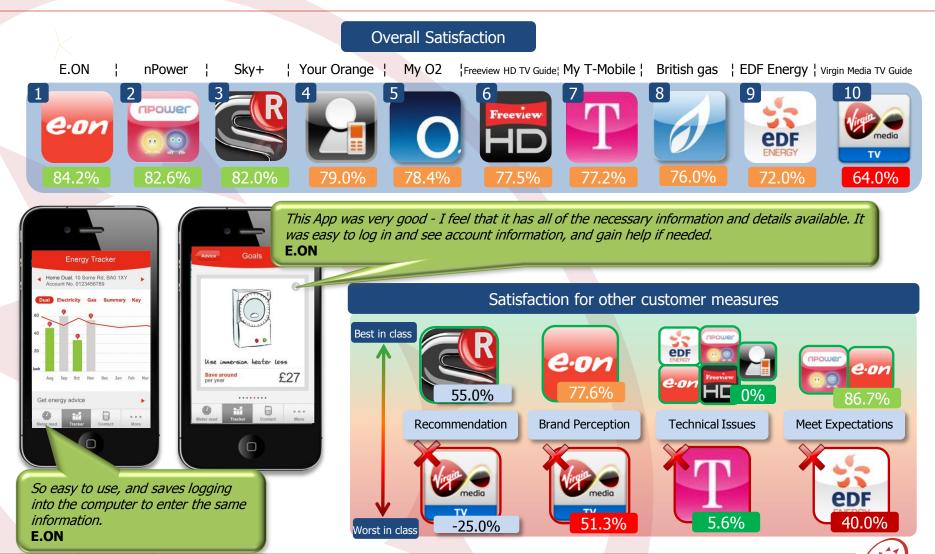


### **Home Services**





### **App** Benchmark – Home Services





### Good points – Home Services

E.ON topped the overall league table for this sector, as they offered easy to find and understand meter reading information along with a bright, aesthetically pleasing design.

Very easy to navigate, and it offered everything I needed to manage my account. I also liked the help articles, which I felt were well written and informative. Your Orange







Well laid out, clear information provided, showed all the necessary information I required regarding my account and mobile phone usage.

My 02

It offered everything I need to quickly and easily manage my gas and electric account.

nPower

- Top scoring Apps had no technical problems and were easy to use, as well as quick to access
- They provided useful and clear information in a simple layout, that meant it was easy for users to find contact details, helpful tips and hints and just generally navigate around the App.
- It was highlighted in shopper comments that the top scoring Apps are well designed, with high quality images and fun pictures as well as the ability to view your usage in an easy to interpret graph.



### Pitfalls – Home Services

Virgin Media was the lowest scoring App with slow to load pages and too much information crammed onto the homepage, making it difficult for users to navigate around and find the information they needed.







I would like to be able to do more with this app, like upgrade, or change my tariff.

My 02

This App didn't really have much else going for it apart from being able to provide a reading. I would have expected to be able to view my account .information/bills etc. This is the kind of App you would quickly forget about using as it does so little.

**EDF Energy** 

Some screens take a long time to load or refresh. **Sky+** 

There was nothing to like about the App. There is a lot to improve. It is very difficult to go ahead from the home page, because it is not an easy to understand App. There was nothing to guide me as a new user.

Virgin Media TV Guide

- Lowest scoring Apps were difficult to navigate and were over crowded with information/adverts.
- These Apps were slow to load and are the ones that experienced technical errors.
- People found it difficult to find key contact numbers and terms and conditions, and in some cases were unable to view their account information.
- The design of these Apps were less appealing in terms of colour and overall layout.



### Information about eDigitalResearch



### eDigitalResearch - Who are we and what we do

We are one of the leading providers of digital market research

- established in 1999 by current directors/owners
- self funded, financially secure, clear ethics
- own system with outstanding technical support
- team of research professionals
- company partners MRS and ESOMAR

We are migrating traditional market research to digital methodologies

- reducing costs fixed pricing model
- faster results real time results
- improving accuracy no response or panel limits

We are developing and introducing innovative research solutions

- social networking (digital communities)
- maximising respondent engagement
- industry norms/benchmarking
- mCommerce/mResearch



### **Product Overview**

### **eMysteryShopper**

- 'Closed group' researchUsability &'end to end' experience
  - Benchmarking

### ePanelManager

- Omnibus research
  - Client panel management
  - Media panels



### eDigitalCommunities

- Web 2.0
- 3 way dialogue from profiled users
  - Product ratings
    - Net chats

### eDigitalSurvey

- 'Open' user research
- Visitor/user opinion
  - Key performance indicators
  - Brand advocacy

### eBuzzBox

- Automated qual-to-quant text analysis
- •Full reporting of verbatim comments across any digital medium



### **Contact details**

If you would like a bespoke presentation of results, to be included in the next App Benchmark report or to discuss how eDigitalResearch can help you develop your mobile strategy, please get in touch with the business development team:

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