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# MOBILE RETAIL REPORT

2015 UK Edition

Report analysing the mobile web experience offered by multi-channel retailers in the UK, based on the core tenets of multi-channel retailing on a mobile device.

# FOREWORD

## *Mobile Retail Report: 2015 UK Edition*

A mobile optimised website is no longer simply a box to be ticked, it is a channel to be tested, optimised and improved. The truth is, for the foreseeable future it may be difficult to directly attribute the mobile channel to purchases. But that doesn't mean it's a channel to give up on.

Anecdotally we hear retailers talk about increased traffic from mobile devices but lower conversion rates. Yes, mobile devices have smaller screens and 4G is not as prevalent as it should be yet in the UK. However, we can't blame the device for low conversion.

To utilise the mobile channel fully, retailers must begin to think about conversions differently. For example, it may be of equal or higher importance to get a customer for sign in, find a store or save a product for later rather than purchase through their mobile

device. Customers often don't complete a full shopping journey in one sitting or through a single channel. Especially on a mobile device when interruptions are inevitable. Retailers must make it easy for customers on mobile to pick up where they left off or save their session for later.

On a whole, retailers are actually doing mobile pretty well. Where there are pitfalls, it's not hopeless. This report's aim is to provide insight and a quantitative framework for measurement. We wish to aid in giving retailers actionable items to focus on.



**Darryl Adie**

Managing Director, Ampersand



# THE CRITERIA

We have defined a [multi-channel retailer](#) as those that sell online **and** in more than one physical store.

Because this is a report about multi-channel retailers, the retailers chosen for this report must have more than one physical branded store presence, not including concessions. We surveyed 163 retailers that fit the bill. The data in this Mobile Retail Report is based only on those 144 retailers that had a transactional mobile website.

The **Ampersand Mobile Retail Matrix** score for each retailer is based on the overall mobile web experience. We have considered a wide range of factors, all applicable to specialist multi-channel retailers. The Matrix identifies the best-performing multi-channel retailers in the UK, when compared by the mobile web experience.



# RETAILERS

Adidas	Corgi (Hornby)	Foyles (W&G Foyle)	Hornby	Lush Retail	Reebok	The Body Shop
American Golf	COS	Fred Perry	Hotel Chocolat	Majestic Wine	Richer Sounds	The Entertainer
Ann Summers	Cotswold Outdoor	French Connection	House of Fraser	Mamas & Papas	River Island	The Fragrance Shop
Anya Hindmarch	Crabtree & Evelyn	Furniture Village	Hughes Electrical	Manor Pharmacy	Robert Dyas	The Pen Shop Ltd
Aquascutum	Craghoppers	Game	Ikea	Maplin	Rowlands Pharmacy	The Perfume Shop
Argos	Crew Clothing	Gap	Interflora	Marc Jacobs	Ryman	The Whisky Shop
Armani	Currys	George	Jaeger	Marks and Spencer	Schuh	Thorntons
B&Q	D&G	Go Outdoors	JD Sports	Matalan	Screwfix	TJ Hughes
Barbour	Debenhams	Gucci	Jessops	Menkind	Scribbler	TK Maxx
Bathstore.com	Diesel	H&M	Jigsaw	Michael Kors	SCS	Top Shop
Bensons for Beds	Dior	Habitat	Jimmy Choo	Miu Miu	Selfridges	Toys R Us
BHS	Disney Store	Halfords	John Lewis	Molton Brown	Simply Be	Vodafone
Blacks Outdoor Division	Dune	Harrods	Karen Millen	Mothercare	Smyths	Waterstone's
Boots	Dunnes Stores	Harvey Nichols	Kiddicare	Mulberry	Smythson	WH Smith
Build A Bear	Early Learning Centre	Harveys Furniture	Kurt Geiger	Multiyork Furniture	Space NK	Whistles
Burberry	Estee Lauder	Hawkin's Bazaar	L'Occitane	New Look	Specsavers	Whittard of Chelsea
Carphone Warehouse	F Hinds	Hermes (GB)	Laithwaites	Nike	Speedo	Wickes
Chain Reaction Cycles	Fat Face	Hobbs	Laura Ashley	O2 UK	Sports Direct	Wiggle
Clarks	Field & Trek	Hobbycraft Group	Lego	Paperchase	Staples	Zara
Clinton Cards	Flannels	Holland & Barrett	Liberty	Paul Smith	Superdrug	
Coast	Fortnum & Mason	Homebase	Links of London	Prada	Tesco Direct	

# RESULTS / TOP

## HOUSE OF FRASER

88/100

**Lost points for** Mobile speed score.

**Excelled at** offering a persistent cart, offering wish listing, putting store locator link in a primary location, offering geolocation, good form usability.

## BURBERRY

83/100

**Lost points for** not offering wish listing or stock check in store.

**Excelled at** offering a persistent cart and save basket, putting store locator link in a primary location, offering geolocation, product zoom and good form usability.

## John Lewis

83/100

**Lost points for** poor mobile speed score, no save basket functionality.

**Excelled at** offering a persistent cart, putting store locator link in a primary location, offering geolocation, product zoom and good form usability.

## SCREWFIX

83/100

**Lost points for** poor mobile speed score.

**Excelled at** stock check in store, offering a persistent cart, offering wish listing, putting store locator link in a primary location, offering geolocation, good form usability.

## TOPSHOP

83/100

**Lost points for** not offering wish listing.

**Excelled at** offering save basket, offering a persistent cart, store locator link in a primary location, offering geolocation, good form usability.

## BHS

79/100

**Lost points for** no wish listing, no save basket or check stock in store.

**Excelled at** putting store locator link in a primary location, offering geolocation, good form usability.



79/100

**Lost points for** no wish listing, save basket or geolocation functionality.

**Excelled at** offering reserve and collect same day, check stock in store, store locator link in a primary location, good form usability.

## Harveys

The Furniture Store

79/100

**Lost points for** no wish listing, no save basket.

**Excelled at** offering a persistent cart, check stock in store, store locator link in a primary location, offering geolocation, good form usability.

## JIMMY CHOO

79/100

**Lost points for** no check stock in store, average mobile speed score.

**Excelled at** offering wish listing, offering save basket, offering wish listing, store locator link in a primary location, offering geolocation, good form usability.

## SimplyBe

79/100

**Lost points for** no wish listing, no save basket.

**Excelled at** offering a persistent cart, check stock in store, store locator link in a primary location, offering geolocation, good form usability.

# 66%

of mobile menu links are located on the top left-hand side of the screen

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# 84%

of retailers require sign in to save products to wish list

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# 70%

of retailers display a store locator link in their main navigation menu

# RESULTS / BOTTOM

## The Fragrance Shop

21/100

**Lost points for** poor mobile speed score, no persistent cart, poor form usability, no geolocation.

**Excelled at** offering product zoom, and displaying store hours.



21/100

**Lost points for** no persistent cart, poor form usability, not offering wish listing.

**Excelled at** offering product zoom and geolocation.



17/100

**Lost points for** hiding store locator link in the footer, no persistent cart, poor form usability, no product zoom, no geolocation.

**Excelled at** mobile UX score of perfect 100 and offering wish listing.

## DUNNES STORES

17/100

**Lost points for** poor mobile speed score, no persistent cart, poor form usability, no product zoom.

**Excelled at** offering wish listing, displaying store hours and geolocation.



17/100

**Lost points for** not showing store hours, poor mobile speed score, no persistent cart, poor form usability, no product zoom.

**Excelled at** offering wish listing and geolocation.



13/100

**Lost points for** poor mobile speed score, no persistent cart, poor form usability, no product zoom, no geolocation.

**Excelled at** displaying store hours, above average UX score.



13/100

**Lost points for** hiding store locator link in the footer, no persistent cart, poor form usability, no product zoom (however images offered detail), no geolocation.

**Excelled at** displaying store hours, above average mobile speed score.



13/100

**Lost points for** hiding store locator link in the footer, no persistent cart, poor form usability, no product zoom, no geolocation.

**Excelled at** displaying store hours, above average mobile speed score.



8/100

**Lost points for** no visible store locator link, no persistent cart, poor form usability, no product zoom, no geolocation.

**Excelled at** Not much. Overall the design is tasteful. Shame about the services.



8/100

**Lost points for** no visible store locator link, no persistent cart, poor form usability, no product zoom, no geolocation.

**Excelled at** mobile speed score is above average, UX score is also good.

# 1. TECHNOLOGY

Out of the 163 retailers researched overall, surprisingly 11% still did not offer customers an optimised experience on mobile.

A mobile optimised website is not simply a box to be ticked, it is a channel to be tested, optimised and improved.

We used Google Developers PageSpeed Tool for scoring mobile page speed and UX. Speed continues to be a key area for improvement for most retailers. Just 2% of the 144 retailers with mobile optimised websites scored 75 or above out of 100 for mobile page speed. 34% of retailers scored between 51 and 75 and the average score was 57.

Clinton Cards and Barbour were the worst-performing on the mobile speed scale, scoring 11 and 25 respectively.

The highest score was an impressive 93, achieved by Staples, followed by 90 -- Speedo. For UX scoring, an impressive 84% of retailers scored 99 or above using the Google tool.



See how you compare. Download the Mobile Retail Matrix (Excel file).

[Click here](#)

# MOBILE SPEED

## Number of retailers, separated by mobile speed score

Mobile speed continues to be a key area for improvement for most retailers. 29% achieved scores below 50.



## 2. CUSTOMER JOURNEY

The popularity of the 'hamburger' menu icon style has risen greatly over the last few years. Most (77%) of retailers displayed some form of this icon. Of those that did, 13% displayed the icon along with the word 'menu', 82% placed it on the left-hand side, 11% placed it in the middle and 7% placed it on the right-hand side.\*

The mobile customer journey should cater for interruptions such as a customer getting a phone call, a text or simply losing service. Because of that, retailers must make it easy for customers to pick up their journey where they left off. Just under a quarter (23%) of retailers did not offer a persistent cart across devices, a function that we believe is fundamental to a good cross-channel customer journey.

Wish listing products is one of those micro-conversions retailers should be optimising and measuring, however 59% of retailers surveyed did not offer this functionality. Of those that did, 84%

of retailers forced customers to sign in immediately.\* Offering saving or sharing basket functionality could also improve a mobile strategy and cater for interruptions, yet only 3% of retailers offer this.\*

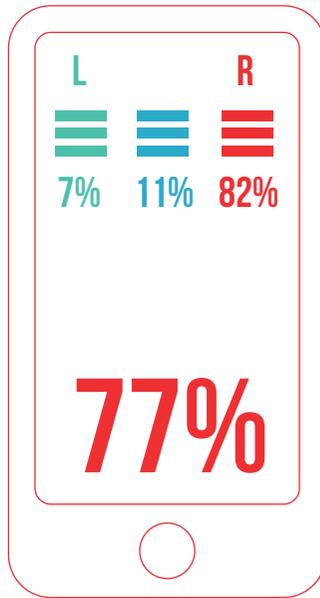
Most (69%) retailers display the store locator link in a prominent location within their mobile websites, i.e. The top or hamburger menu. However, a shocking 6% of retailers didn't display a store locator link on their mobile websites at all.

A transaction on mobile may not be the most important conversion. Simply saving a product, signing in or finding a store on a mobile device could be as or more important than buying.

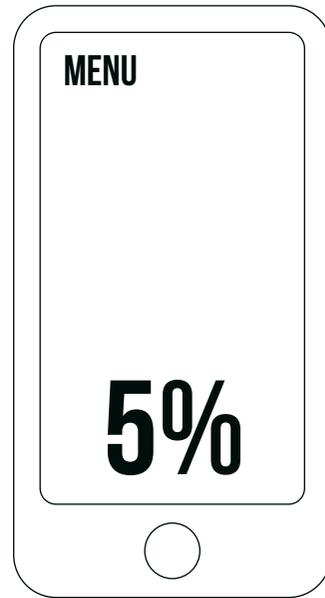
\* While these criteria do not count towards the retailers' Mobile Retail Matrix ranking, they are interesting to highlight.

# MENU NAVIGATION

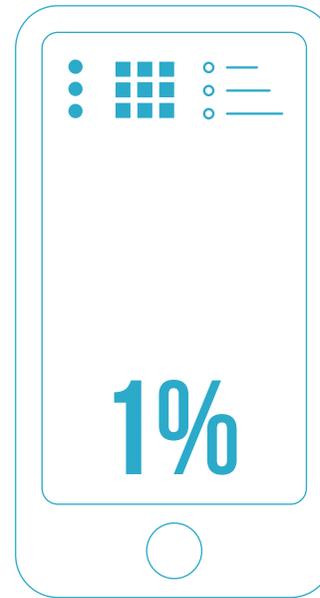
Placement and type of menu navigation



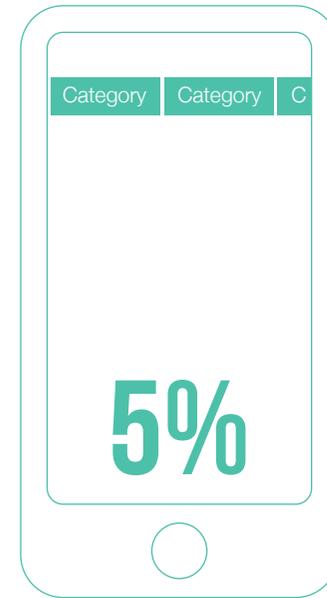
Burger icon



Word 'Menu'



Other icon



Categories list

# SAVING PRODUCTS

Retailers' wish listing offering, separated by cached and requiring sign in

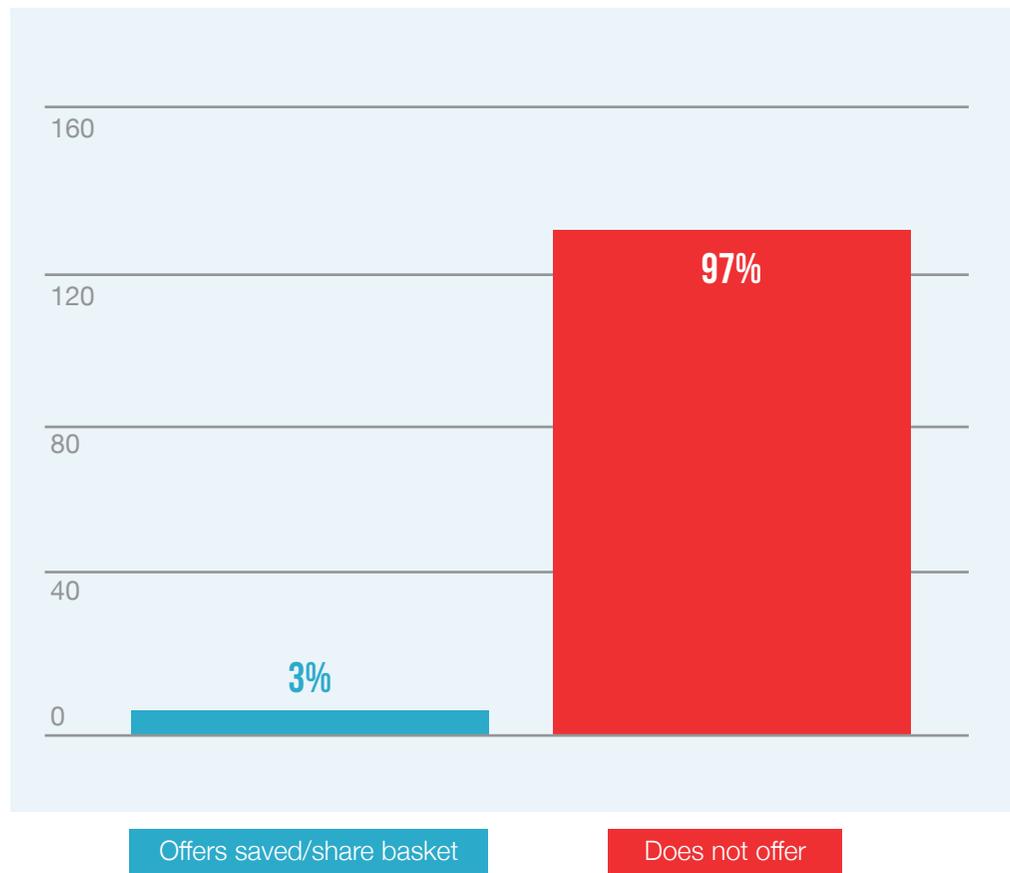
Most retailers offering wish listing require login, which is not surprising. Login may be just as important a conversion on mobile as checking out.



# SAVE A BASKET

## Retailers' share or save basket offering

When designing for interruptions that are inevitable on a mobile device, a surprising amount of retailers did not offer a way to share, save or recover a basket.



# 3. USABILITY

A small development oversight can create huge mobile usability problems for retailers. In a consumer survey of 2,044 GB adults by YouGov and commissioned by Ampersand, two things put consumers off buying or researching goods on a small device: It's difficult to type (40%), and it's difficult to see products properly (34%).

Specific keyboards should be used for specific inputs to make it easy for a customer to type numbers and email addresses while using their mobile. Making this update is simple for a developer, yet over 40% of retailers did not optimise forms for mobile in this way.

Consumers also cite that it's difficult to see products on a small screen, yet nearly half (49%) of retailers did not offer product

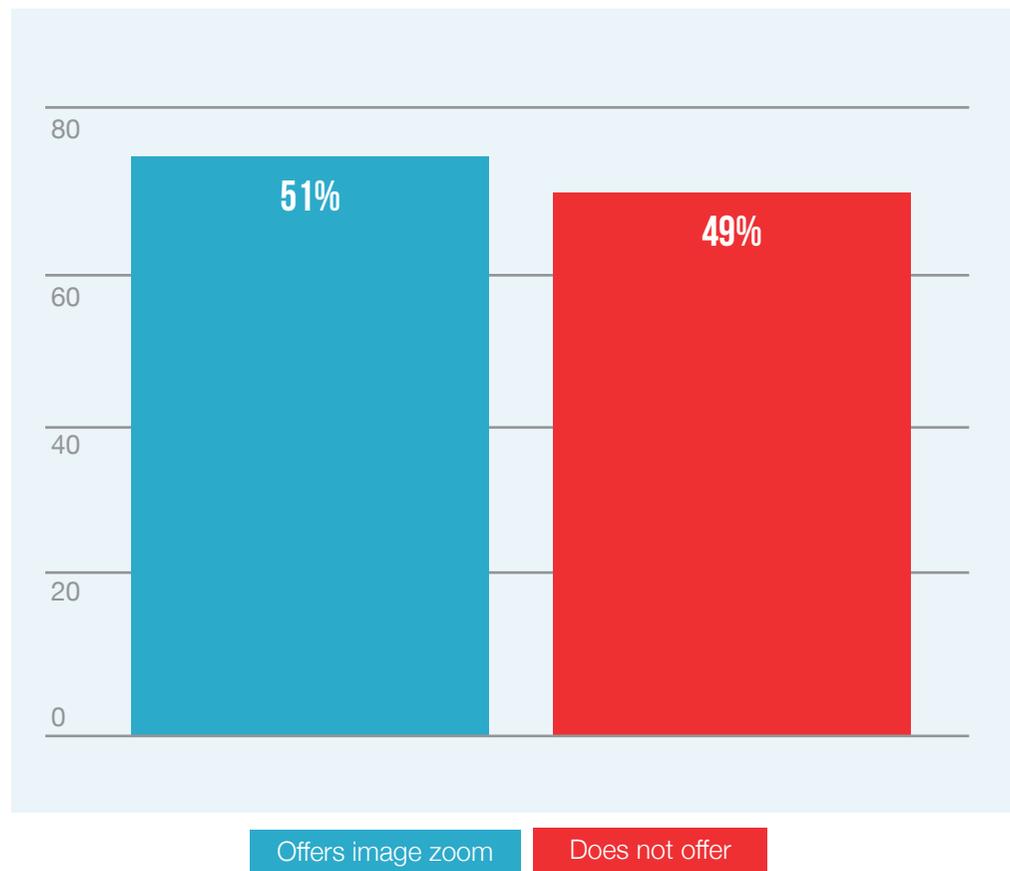
zoom. In addition, many retailers have not displayed retina optimised imagery.

Several retailers, such as Laura Ashley, Paperchase and Links of London, have not catered for how hovers will work on a touch screen mobile device, leaving a customer to tap twice in order to click. However, it is encouraging to see some retailers valuing usability over branding, replacing the company logo with either the category name (BHS, Top Shop) or a back to top link (COS) once a customer is a few steps into their browsing journey.

Another design pattern trending amongst retailers with mobile optimised websites is 'add to basket' buttons that stick to the bottom of the mobile viewport. Retailers such as H&M, Zara and B&Q display call to actions in this way.

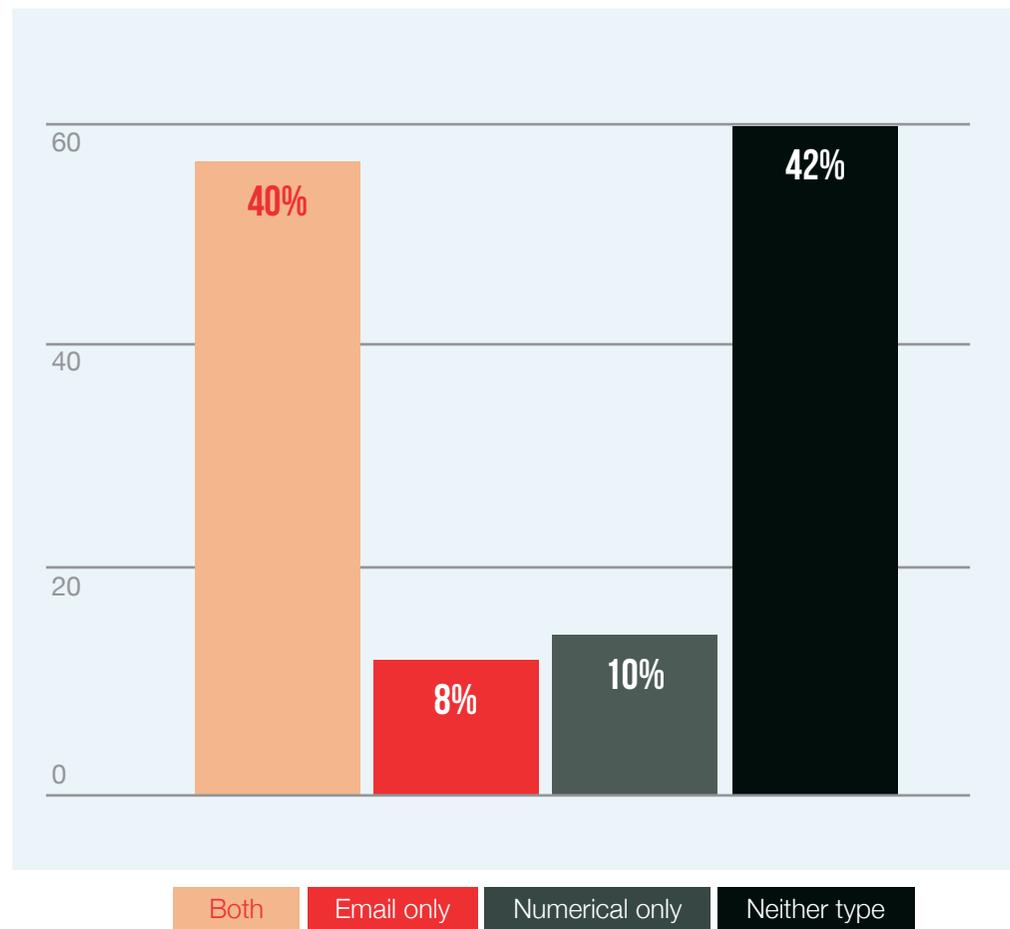
# PRODUCT ZOOM

Retailers' product image zoom offering



# KEYBOARDS

Retailers' offering of different types of input-specific keyboards



# 4. MOBILE SERVICES

For multi-channel retailers, physical stores are their primary assets. Consumers using a mobile device are most likely to look up location or opening hours of a retailer, even over purchasing and researching products for purchase later, according to our YouGov consumer survey. Therefore, a retailer's store locator should be prominent and simple to use on mobile.

A surprisingly high number of retailers (39%) did not offer geolocation services on their store locator. Even more surprising is that more than a few retailers such as IKEA, River Island, Zara and H&M required customers to choose their country from a list before even being able to access the mobile website.

While most retailers (82%) displayed store opening times on their store pages, 12% did not.

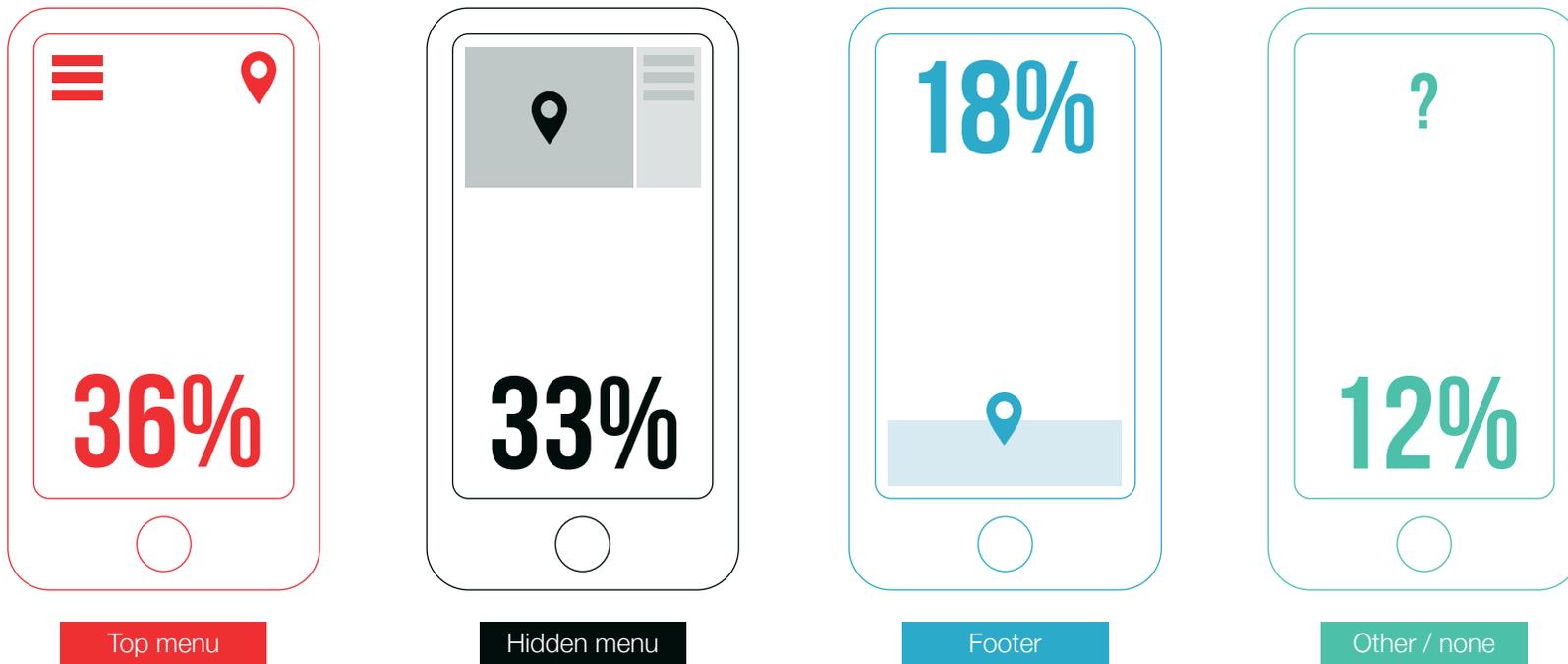
The key to cross-channel stock management is data integration.

For many retailers, stock data is handled in a different way between online and offline channels, making unification almost impossible without fundamental changes. For this reason, it's not surprising that only 22% allow customers to check stock levels in store.

Following John Lewis' announcement that it will charge for collection orders under £30, the chatter has been loud in the media about free click and collect becoming unmanageable for retailers. This news has also sparked debate around collection services, including reserve and collect. Only 7% of retailers are currently offering reserve and collect, however 80% of those that do, offer it same day including Hobbs, Schuh, Maplin and Go Outdoors.

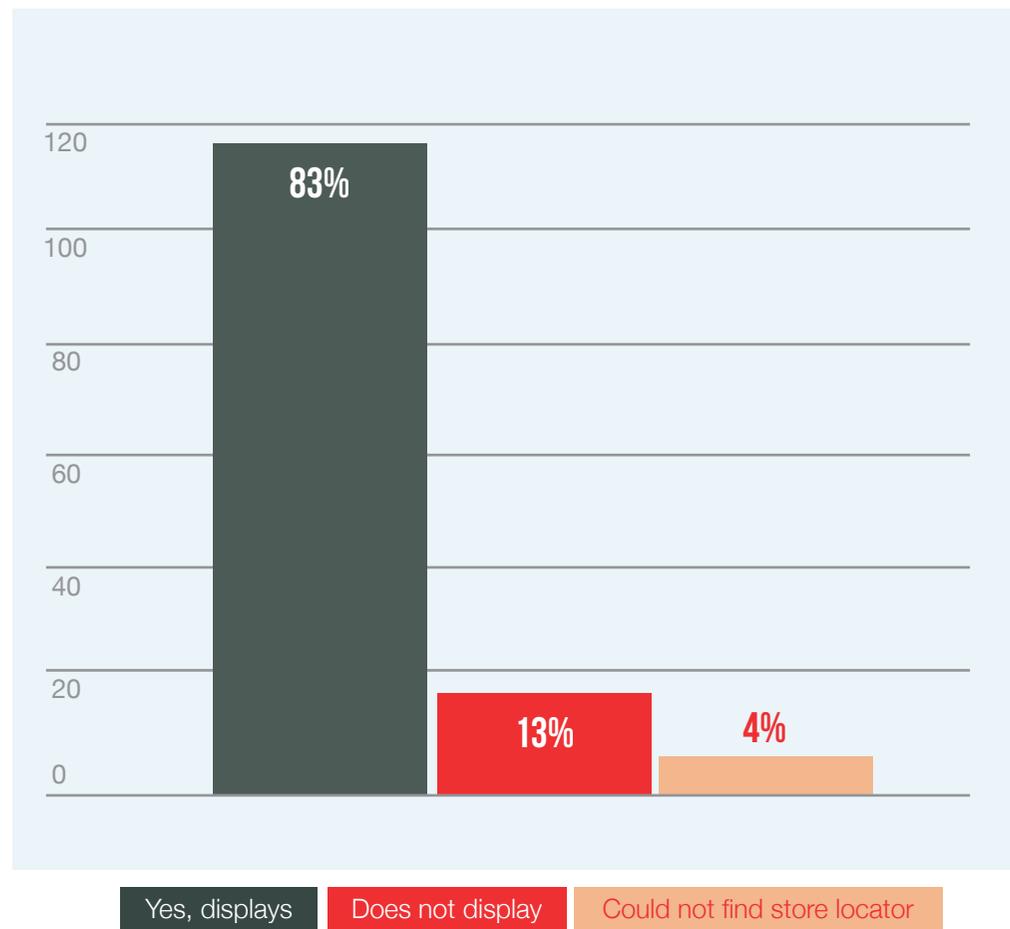
# STORE LOCATOR

Primary placement of store locator link on retailers' mobile websites



# STORE OPENING HOURS

Number of retailers offering store information, such as opening hours



# RESULTS / BENCHMARKING

Comparing Mobile Retail Matrix scoring by sector



See how you compare. Download the Mobile Retail Matrix (Excel file). [Click here >](#)

69

Median score  
**Department**

Department stores are leading the way, by far, in mobile retail web innovation and usability.

54

Median score  
**Fashion**

Fashion retailers come second, but not quite as close to department stores as expected.

50

Median score  
**Non-Fashion**

This signifies that non-fashion retailers are going equally well and poorly on the mobile web.

# DO THIS NOW

Many of the things that put consumers off mobile shopping are easily fixable with minimal development. Retailers who make their mobile websites easier to use are sure to win loyal customers across all channels.

Firstly, make sure that consumers can really see your products. Optimise your mobile website for retina devices and use product zoom on product detail pages or display many product images, including a few for detailed view.

Secondly, if you have stores, flaunt them. Display your store locator link in a primary location on your mobile website and make sure that automatic geolocation is enabled to allow customers to use their current location to find your stores.

Lastly, for customers who want to purchase on mobile, make it easy for them to do so by utilising the correct numerical and email specific keyboards.

While it may not be possible to achieve everything you want to on mobile immediately, creating a development roadmap will help ensure future plans are kept front of mind. Ampersand understands the common pain points established high street retailers face when navigating the complexities of multi-channel retail.

Let's talk.



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# METHODOLOGY

To create the list of retailers used in this research, we first aggregated various existing lists. We used IMRG financial rankings, web traffic data from Hitwise and Sitemorse's usability list. This gave us over 2,000 companies to research. We eliminated retailers that did not have a UK presence, had no ecommerce presence, no transactional mobile website and no physical stores. The final list comprises 144 multi-channel retailers.

The Ampersand Mobile Retail Matrix criterion represents the core tenets of retailing online, specifically using the mobile web to shop on a mobile device.

The remaining retailers were split into their appropriate sectors.

The Ampersand Retail Matrix criterion are our view of the core tenets of multi-channel retailing on a mobile device.

The criteria includes: Whether the retailer has a mobile optimised, transactional website.

Page load speeds and performance mobile using Google Developers PageSpeed Tools

Where retailers placed the link to their Store Locator and whether or not store hours were displayed

Whether or not the retailer offered product zoom on product pages

GPS/location information – whether customers can find the nearest store by using geolocation

Whether or not the retailer offered easy to use numerical and email input keyboards within checkout

Retailers were then scored against the criteria and with a weighted formula, ranked in the Retail Matrix.

To calculate the base score marked out of 24 possible points from 15 criteria, a retailer was awarded 1 point if it scored positively for each of the criteria mentioned above, with these specifics:

- Offering reserve and collect same day
- Mobile Speed >71
- UX Score >99

We awarded 4 total points for the following criteria, chosen after getting back the results of the YouGov consumer survey:

- Placing the store locator in a prominent location
- Persistent cart
- Using both numerical and email keyboards
- Featuring keyboard zoom

We then calculated the final score to be out of 100:  
 $=100/24*SCORE.$

All research was completed in Manchester, UK on an iPhone 6 Plus using the Google Chrome browser on iOS8 between 20 June 2015 and 2 July 2015.

All desk research on retailers is copyright Ampersand Commerce Ltd. YouGov surveyed 2044 respondents in June 2015, on behalf of Ampersand Commerce Ltd.

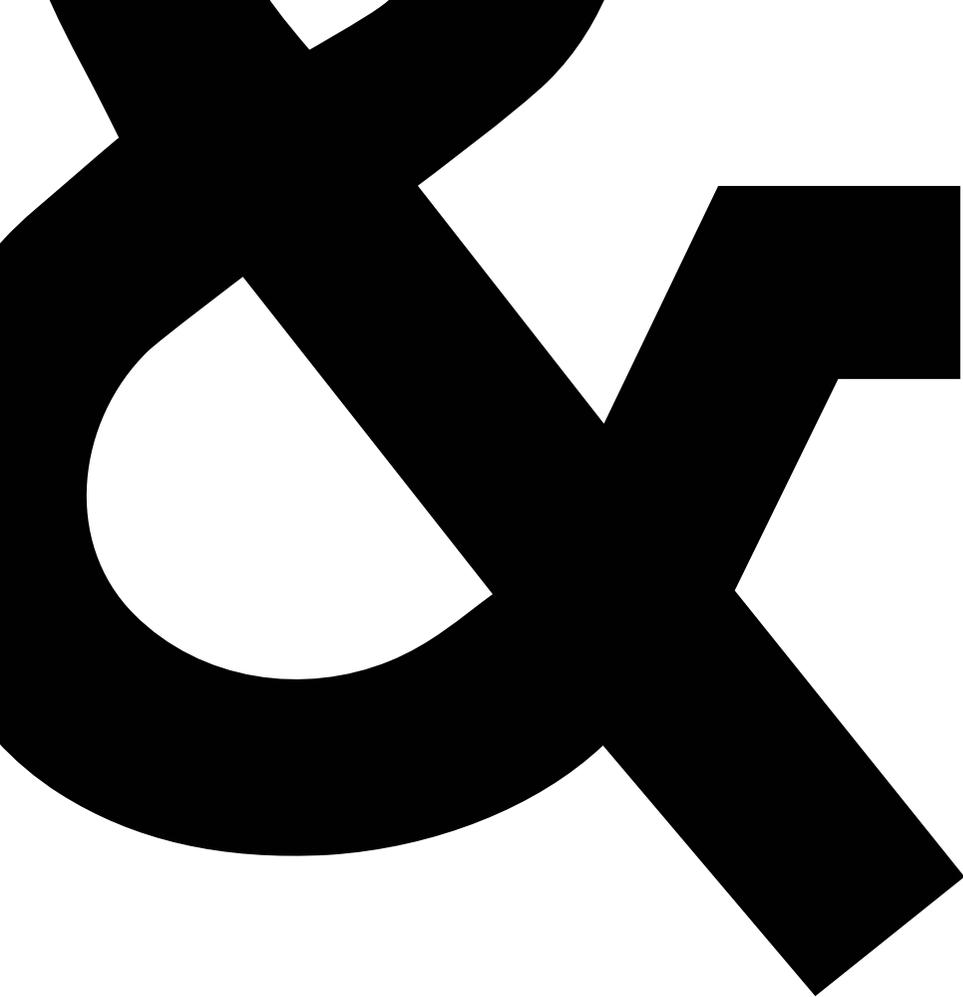
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For press enquiries, please contact [ampersand@mww.com](mailto:ampersand@mww.com).



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Ampersand is an award-winning commerce agency that helps established high street retailers build better online stores. Ampersand works with multi-channel retailers, such as Harvey Nichols, Poundland and Bensons for Beds to help increase conversion and efficiency through the strategic use of technology.

