

THE GLOBAL UX MAP

Localizing the eCommerce experience for international audiences

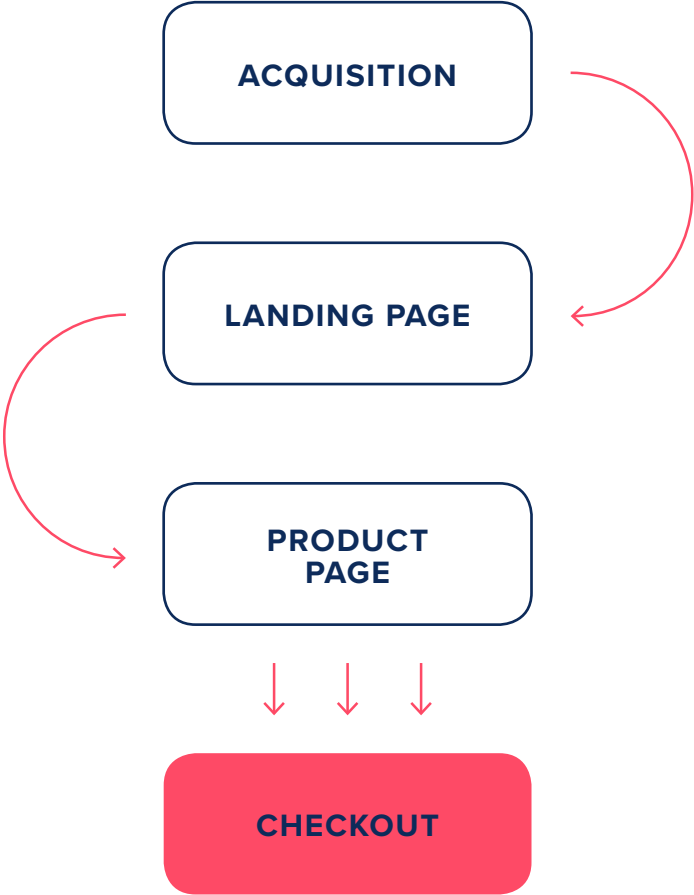


**EVERYTHING YOU
NEED TO KNOW
ABOUT DIGITAL
CONSUMER
BEHAVIOR IN**

US
UK
France
Germany
Italy
China
Japan

07	INTRODUCTION
08	METHODOLOGY
10	INTERNET USAGE WORLDWIDE
17	INTERVIEW WITH SANDRINE PLASSERAUD, FOUNDER AND CEO OF WE ARE SOCIAL FRANCE
20	COMPARING CUSTOMER ACQUISITION CHANNELS
28	DISTINCT BROWSING PATTERNS
36	MENU, SEARCH BAR, CAROUSEL: SEARCH VS. WINDOW SHOPPING
44	PRODUCT PAGE : KEEPING VISITORS ENGAGED AND CONFIDENT
52	CHECKOUT DATA PROTECTION LAWS AND PRIVACY CONCERNS
56	TAKEAWAYS : KEY BEHAVIORS BY COUNTRY
64	INTERVIEW WITH ALEXANDRE ANZO, HEAD OF DESIGN AT EMAKINA
68	INTERVIEW WITH ALEXANDRE CRAZOVER, CO-FOUNDER OF DATAWORDS
70	CONCLUSION

The customer journey at a glance





ACKNOWLEDGEMENTS

Special thanks to the following experts for their precious insights:



Sandrine PLASSERAUD,
Founder and CEO, We Are Social France



Alexandre ANZO,
Head of Design, Emakina



Alexandre CRAZOVER,
Co-Founder, Datawords Group



Fanny POURCENOUX,
Head of UX/UI Design, Contentsquare

Thanks also to Esther, Pierre, Jean-Marc, Alix, Geoffrey, Laure, Julie, Suzy, Juliette, and Solène, for their contributions.



“When In Rome...”

Let us imagine for a minute you are opening a store abroad.

The challenge is twofold: maintaining your brand's identity and integrity along with adapting the customer experience for global audiences. Consumers in China and the US, for example, will have a different set of expectations.

You wouldn't use the same marketing strategy to target consumers in France and in Japan. And consumers in the UK and Germany might have different ideas of what a successful in-store experience looks like.

It's one thing to adapt the brick-and-mortar experience to different audiences, **but how do you do this online? Are browsing patterns really that different from one region of the world to another? And if so, what is the best approach?**

While some brands lead the way when it comes to adapting to local consumer markets, others are more hesitant, citing a lack of data, a poor understanding of global markets, or confusion over how to best localize their strategy.

These are the challenges we will address in this report, which will provide guidance on the concrete actions brands can take to craft successful experiences for international audiences.

Methodology

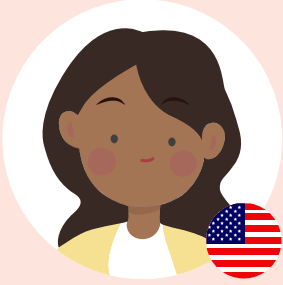
This report offers a comparison of digital consumer behaviors in the following countries: China, France, Germany, Italy, Japan, the UK and the US.

**3
billion**

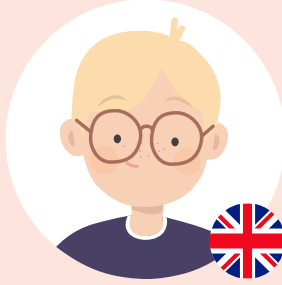
number of clicks analyzed
between January and
February 2019

We analyzed more than **35 million visitor sessions** from January and February 2019, on **11 luxury sites**, surveying brands with both an offline and online presence in each of the **7 countries** we studied — that's **150 million pageviews and 3 billion clicks**.

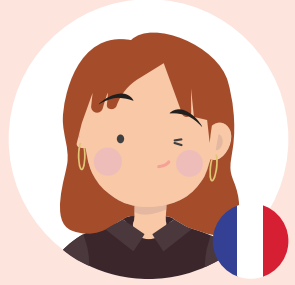
Meet our global consumers



Samantha, US



Craig, UK



Juliette, France



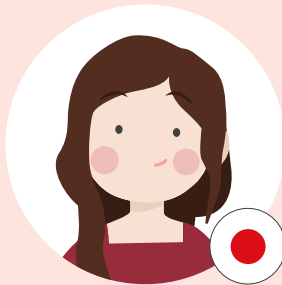
Hanz, Germany



Gianni, Italy



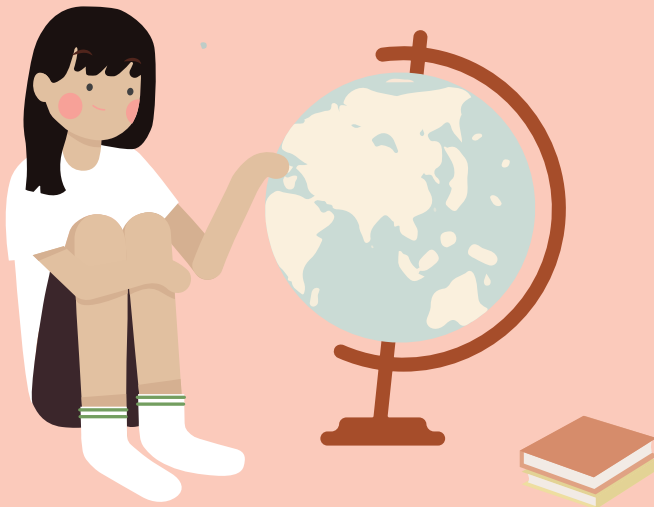
Xin, China



Toshi, Japan

1. Internet usage worldwide

While you wouldn't be wrong to think that most people in the world are connected to the internet, access rates remain uneven. Here's what you need to know about global internet usage and eCommerce today.



GLOBAL VILLAGE - THE SPECS

Universal internet access (well, almost)

With an average internet penetration rate around 90%, the 7 countries included in our research are rather well-connected, although China still has some way to go to ensure universal internet access, with a 54% penetration rate.

54%

Internet penetration in China.

Uneven (but acceptable) connection speeds

The quality of connection varies from country to country, but the 7 we included in this report have average speeds of 9 Mbps and higher — fast enough to provide a smooth browsing experience on most web and mobile sites.



The Great Firewall

While upload speeds of 9 Mbps or higher are generally considered good, the Great Firewall of China has been known to significantly slow down load times for foreign sites (up to 7 times slower in some cases).

A product page that takes 1.7 seconds to load in Japan will have a 3.7 second load time in China. With 53% of mobile visitors abandoning a site that takes more than 3 seconds to load, slow speeds can often translate to high bounce rates.

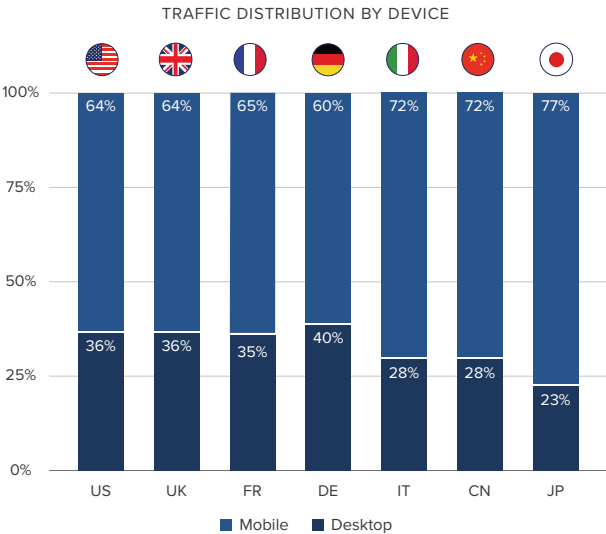
53%

The percentage of mobile visits cut short when the load time exceeds 3 seconds.

Mobile traffic in China

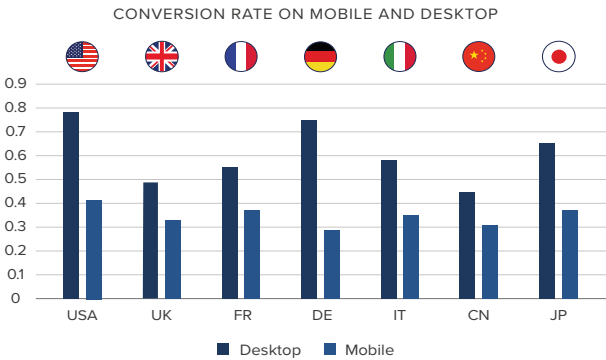
Mobile drives the lion's share of traffic in all countries, including in China, where 77% of all traffic comes from mobile devices.

Aside from Italy, mobile traffic is even across Europe and in the US. Mobile traffic dominates in China and Japan.

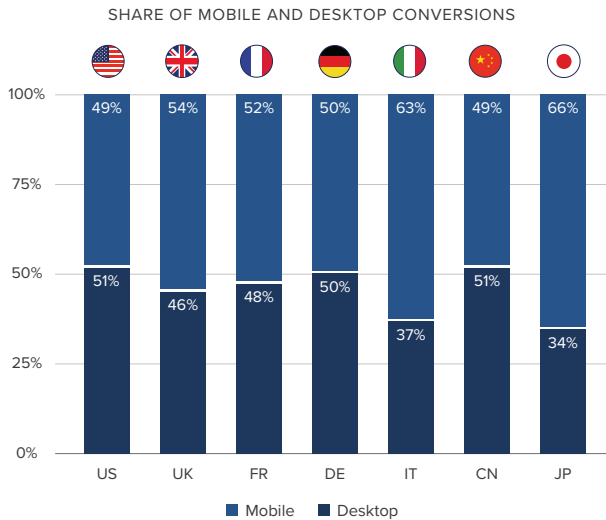


UNLOCKING THE MOBILE OPPORTUNITY

Mobile eCommerce is on the rise (and is predicted to soon account for 73% of luxury purchases). And yet, mobile conversions are still lagging (42% lower than desktop conversion rates, on average).



Mobile may drive the biggest share of digital traffic, but conversion rates remain underwhelming in most regions of the world. However, our research shows a fairly even breakdown of purchases across desktop and mobile in China, where **49 out of every 100 purchases are completed on a smartphone**. In Japan and Italy, around two thirds of eCommerce sales are attributed to mobile.



The majority of eCommerce transactions are completed on mobile. In Japan, 66% of conversions are attributed to mobile.

HOW CHINA IS WINNING AT MCOMMERCE

In China, mobile apps dominate the mCommerce market, surpassing other mobile sites. With its 980 million users and the rise of social commerce, the platform WeChat is a force to be reckoned with (WeChat Social Commerce Report 2018). In the second half of 2018, the number of transactions facilitated by the platform increased by 132%.

980 million

number of WeChat users.

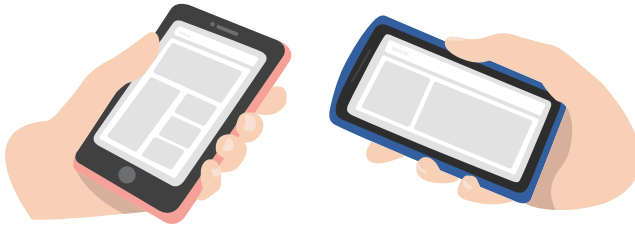


Recommendations



CHINA : PRIORITIZE MOBILE BRAND AWARENESS

Mobile first is definitely the way to go. In China, where consumers browse first and foremost on their smartphones. Instead of building your site for desktop and making it mobile-friendly, take the opposite approach and start from the mobile end.



US, CHINA, FRANCE AND JAPAN: REMOVE OBSTACLES TO MOBILE CONVERSION



With mobile driving a substantial share of traffic, losing out on conversions can prove rather costly.



There are several things you can do to shrink the mobile conversion gap:

- **Streamline customer journeys** by adding sticky call to actions (add to cart, for example).
- **Eliminate unnecessary steps at checkout** by simplifying forms and integrating third party payment providers (Google Pay, Apple Pay, AliPay, WeChat Pay, PayPal...).
- **Include information on delivery and returns** info on the checkout page.
- **Make guest checkout the default option.**



ALL COUNTRIES (BUT ESPECIALLY CHINA): LOAD TIME CAN MAKE OR BREAK THE UX

The faster your page loads, the more likely visitors are to see your content — especially in China, where the Great Firewall can make pages up to 7 times slower to load.

Consider the following methods: optimize and minify CSS, HTML & JS files, minimize redirects, use a CDN to speed up content delivery, regularly audit the performance of your servers, and routinely optimize images and visuals.

ASK AN EXPERT

“If your site is content-rich, it can be hard to ensure speedy load times. As well as optimizing your website speed, keep users engaged with skeleton screens that indicate content is loading (blank pages progressively populated with grey or neutral shapes). This technique will shorten the perceived load time much more effectively than a blank or load screen.”



**Fanny Pourcenoux is the Head of UX/UI
Design at Contentsquare**





Interview



Sandrine PLASSERAUD, President and Founder of We Are Social France, started her career at French auto manufacturer Renault but switched career paths when blogging and social media exploded onto the scene. A blogger herself, she helped the car manufacturer define its messaging for these new platforms before joining the London branch of We Are Social in 2007. In 2010, she launched the company's Paris-based agency.

Contentsquare: People often talk about “mobile first,” but can you identify the main behavioral trends associated with mobile usage?

Sandrine PLASSERAUD: If you read our latest digital report for 2019, you'll see that everything looks rosy for mobile, whether that's mobile penetration (67% of the global population now owns a smartphone), mobile connectivity, or connection speed (+18% compared to 2018).



Nonetheless, there are major disparities between countries, particularly between developed and developing countries. As an example: 3G and 4G are available on 100% of the Australian continent versus only 2% in Cuba!

With almost 6 billion smartphones in circulation in the world, the mobile app market is booming. Not only that — apps are a lucrative business, with consumers spending an average \$17 more on them each year. This increase in app usage goes hand in hand with the significant increase in the quantity of mobile data we consume.

CS: Mobile also seems to be gaining ground in eCommerce: are we seeing the same momentum all over the world?

SP: Today, more than half of consumers (55%) make purchases on their phones. This average hides deep disparities between countries. In Southeast Asian countries like Thailand, and in certain developing economies (such as Indonesia, India or Vietnam), the percentage is much higher than the global average. On the other hand, places like France, Belgium and many other European countries are at the bottom of the table, way below the global average.

The mobile experience has obviously transformed buyer behavior, and brands must fully meet consumer expectations in order to deliver an optimized mobile experience for their clients and prospects.

CS : The concept of “social commerce” is trending right now: can you tell us a bit more about it?

SP : Social Commerce, often considered to be eCommerce's little brother, is flourishing and is changing the rules of the game in retail. Today we no longer use social platforms merely to communicate, share news or opinions, but also to browse products and services. Social networks have been adapting to this new trend and are making it easier to buy online thanks to social commerce functionalities such as marketplaces, purchase buttons, etc.

Startups that sell directly to consumers on social media without a partner vendor have shown that it is possible to build a brand around a strong product by mastering social: Glossier is the perfect example. More traditional brands like Nike, Decathlon or Ikea, which often have competing marketing and sales imperatives, have also adapted to this new consumer trend. They have found a subtle

balance between the two, while striving to communicate in a way that is authentic and meaningful in the long term.

As for the future, it is very likely that brands will continue to spend more and more on advertising and influencer marketing. But celebrity is no longer enough: with an increasing number of products and services available through social, brands are developing their own, unique vision of Social Commerce. Over the next few years we will witness the emergence of new ways to browse, experience and recommend products and services— not just complete transactions.

**we
are
social**

We Are Social is a global creative agency born in the age of social web. We deliver world-class creative campaigns for forward-thinking brands. We're focused on creating ideas powered by people, not platforms and we believe in the power of social insights to generate value. This is what we call Social Thinking.

We have more than 750 collaborators working from 13 offices in 11 countries and on 5 continents (New York, London, Paris, Madrid, Milan, Munich, Berlin, Dubai, Singapore, Shanghai, Peking, Hong Kong, Sydney). We work with a wide variety of brands, including Adidas, Netflix and Old Navy. wearesocial.fr

2. Comparing customer acquisition channels

It's not always easy to compete with the huge acquisition budgets of Fortune 500 companies. But before you lose too much sleep (and money), it's worth knowing which channels are the most effective in each country.



We analyzed 12 acquisition channels in 7 countries on mobile and desktop. **For each country, we asked the following questions:**

Do consumers prefer free or paid channels?
How do they get to your site:
independent research or recommendation?



FREE OR PAID ACQUISITION CHANNELS, THAT IS THE QUESTION

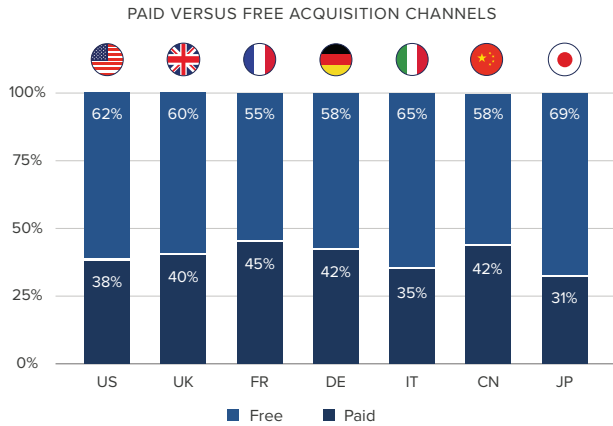
What are we talking about when we refer to “free” channels? Simply put, **acquisition channels that don’t cost brands a thing**. These include:

- **Organic** (SEO)
- **Direct traffic**
- **Free social** (unsponsored content)
- **Referral traffic**

Paid channels involve a direct cost for brands, and include:

- **Paid Search** (SEA/PPC)
- **Paid Social** (sponsored content)
- **Display** (advertising)
- **Affiliate Marketing**
- **Emailing**
- **Brandzone** (Baidu)
- **Retargeting**
- **Key Opinion Leader influencer marketing** (for example in China, on Weibo & WeChat)

Overall, consumers prefer free channels, but in some countries, paid user acquisition drives a large share of traffic (45% in France, for example).



The proportion of paid to free acquisition varied from country to country, although **most of the countries we analyzed rely primarily on free channels to acquire visitors** (61% global average). Three countries stand out:

61%

average share of traffic from free traffic sources

- France, which has the lowest reliance on free channels of all the countries we analyzed (55% only)
- Japan and Italy, which get most of their traffic from free channels (69% and 65% respectively)



CONSUMER RESEARCH OR RECOMMENDATION: A SECOND WAY TO EVALUATE CONSUMER PREFERENCES

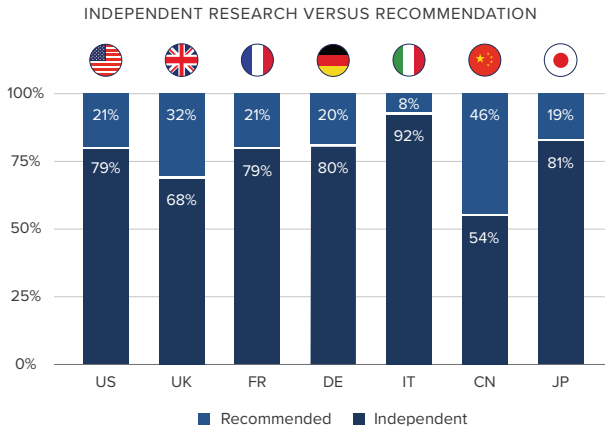
If the difference between paid/free is critical for brands, it is just as important to understand whether consumers find a brand through independent research or by responding to product recommendations. **Understanding consumer behavior at the acquisition stage allows brands to gauge how likely visitors are to make their own way to a site or whether it's worth guiding them there.**

Independent research is initiated by visitors themselves, and includes the following channels:

- Organic Search
- Paid Search
- Direct

Recommending content is also a way to generate traffic to your site, and can be done through the following channels:

- Free social
- Paid social
- Display
- Affiliate Marketing
- Emailing
- Referral
- Brandzone
- Retargeting
- Key Opinion Leader influencer marketing



Independent research is what drives most visitors to a site, but this traffic share varies across countries. In Italy, for example, 92% of consumers will visit a site after searching for a product/service, versus only 54% in China.

In Italy, 92% of visitors will proactively seek out a product or site — 16 points more than the global average. In China (and to a lesser extent the UK), users are much more likely to respond to suggestions, with 46% and 32% of visitors following a link to a site.

92%

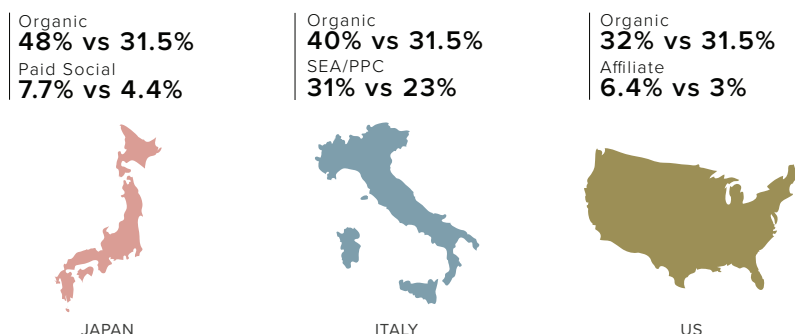
percentage of visitors reaching a site through independent research in Italy.

Where is my traffic coming from?

INVEST IN ORGANIC SEARCH TRAFFIC IN THE US, ITALY AND JAPAN

As we have seen, more than 40% of visitors in these countries will come through free channels, with 70% in Japan. Organic search drives most of the traffic in these three countries (32% of all traffic in the US, 40% in Italy and 48% in Japan (global average = 31.5%).

ACQUISITION TRAFFIC COMPARED TO GLOBAL AVERAGES



IN CHINA, PUSH DISPLAY ADS

For best results with consumers in China, focus your spending on display ads and Baidu's Brand Zone technology. This channel accounts for 28.2% of all traffic acquisition in China (versus a global average of around 4.1%).

IN THE UK, FREE SOCIAL AND EMAIL MARKETING ARE KING

Social platforms are still driving good results in the UK, where free social customer acquisition drives twice as much traffic as in any other country we analyzed (12.4%). Email campaigns are also successful in the UK, accounting for 6.7% of traffic (a whopping

18.4% on mobile). Organic search traffic is not so impactful, however, accounting for 23.1% of traffic (versus the 31.5% global average).

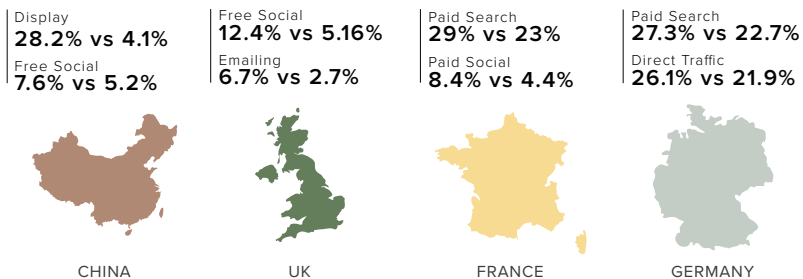
SEA/PPC AND PAID SOCIAL PERFORM WELL IN FRANCE

Paid acquisition channels perform best in France (45% of total acquisition), mainly thanks to paid search. Indeed, 29% of visitors come from paid search — around one third more than in other countries. Paid social also accounts for a large share of traffic in France — 8.4% (versus 4.7% global average).

GERMANY: PAID SEARCH AND DIRECT TRAFFIC

Paid search is big in Germany, accounting for 27.3% of all traffic. Direct traffic is also higher here than anywhere else (26.1%), suggesting visitors in Germany are particularly interested in (and loyal to) big-name brands.

TRAFFIC SOURCES COMPARED TO GLOBAL AVERAGES



ALL COUNTRIES: DON'T NEGLECT YOUR LANDING PAGE!

Acquisition channels, as useful as they may be, are only good for acquiring visitors. **Redirecting users to a page that is not relevant to them will only hurt your ROI and will often result in a poor experience for the visitor.** There's no point in winning at acquisition only to lose at retention!

CONTENTSQUARE EXPERTISE

“Spoiler alert: visitors don’t always land on the homepage! Here are some best practices you can follow to make all your pages an effective gateway to your site:

- *Make sure visitors can easily access all categories on your site via the menu or breadcrumb trail so they are not locked into a single product,*
- *push cross-sell to encourage deeper navigation and more product pageviews,*
- *clearly display reassurance elements.”*



Fanny POURCENOUX,
Head of UX/UI Design, Contentsquare





3. Distinct browsing patterns

A user has just clicked a link and now they're on your site — what's next? Will they stay? If so, for how long? How many pages will they view during their session?

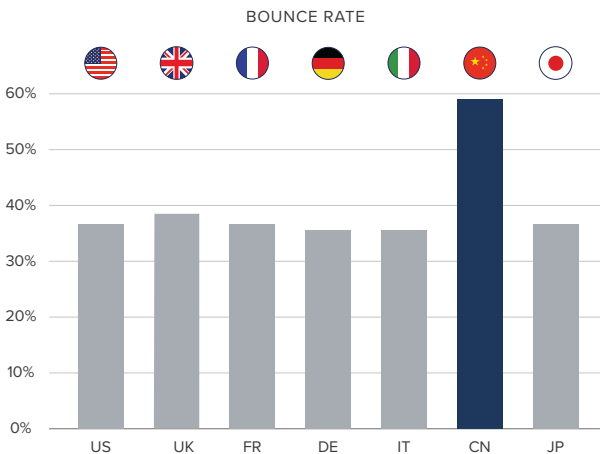
Let's take a closer look at these metrics, and compare local browsing behaviors.



EVEN BOUNCE RATES, EXCEPT IN CHINA

Our analysis showed even bounce rates across the board (around 39%) except for China, where the bounce rate was 59% across devices. There are several reasons for this: a slow load time (3.7 second average), little to no video content on the homepage, and a lack of reassurance elements (customer reviews, security certifications, etc).

So what are the main challenges of growing your brand in China? **First, monitor loading speeds and keep them low.** Next, capture your visitors' interest quickly, or you risk losing them before they even get to a second page.



3.7 seconds

average loading time of a homepage in China



China has the highest bounce rate of all countries we analyzed (x2)

FEWER PAGEVIEWS IN CHINA

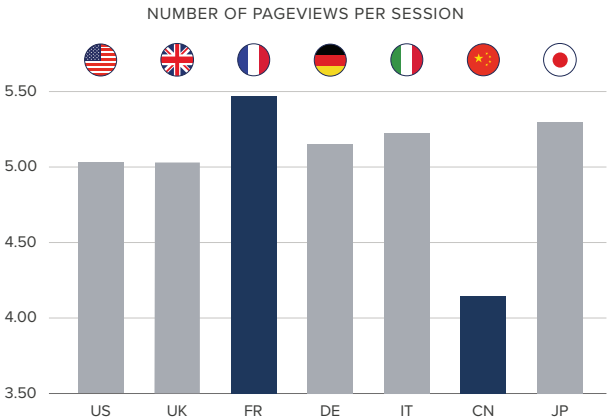
Visitors in China view of just over 4 pages on average during their visit versus at least 5 in the rest of the world.

High bounce rates and few pageviews: not only is it important for brands to engage visitors from the get-go, they should also concentrate their content into fewer pages if they want consumers in China to interact with it.

French consumers, on the other hand, **will gladly click through many pages.**

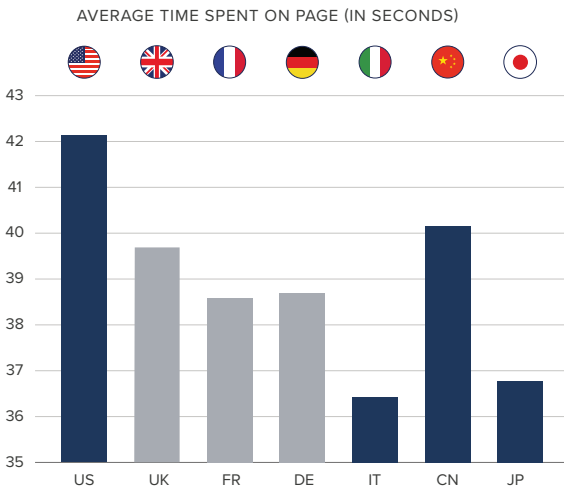


France has the highest number of pageviews per session (5.4 pageviews per session). China has the lowest (4.1 pageviews per session).



AVERAGE TIME SPENT ON PAGE: CATERING TO ENGAGED AND DISTRACTED USERS

In the US and China, the average visitor will spend more than 40 seconds on a page (40 in China, 42 in the US). In Italy or Japan, visitors are more easily distracted and will leave a page after 36 or 37 seconds.



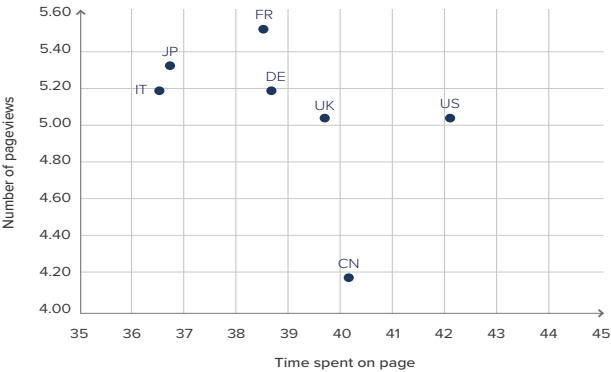
Visitors in the US and China are considerably more engaged than visitors in Italy and Japan.



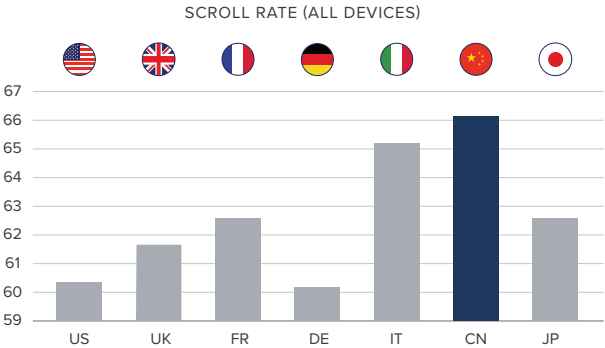
VISITORS IN CHINA TEND TO SCROLL MORE

In China, visitors consume fewer pages, but will spend more time on a page. So how exactly do users browse in China? We analyzed the content on several sites to answer this question.

Time spent on page and number of pageviews are polarized: the US, China, France and Italy each have distinct trends.



With a 66% scroll rate (versus 62% global average), **visitors in China scroll more than any other group** we studied for this report. They do not hop from page to page (which explains the low number of pageviews), choosing instead to focus their time and attention on whatever page they are viewing.







Recommendations



US : REDUCE THE NUMBER OF PAGES

- Visitors in the US like to take their time on a page. Concentrate your content on a few pages and stick to a simple, intuitive design.



CHINA (AND TO A LESSER EXTENT, THE UK) : ENGAGE USERS FROM THE START.



- With the **highest bounce rate of all the countries we analyzed**, visitors in China and the UK require quality content and attractive CTAs in order to be hooked from the moment they land on your site.
- **Pack your Chinese site with content** (particularly the homepage) as your visitors will not be shy about scrolling. Bold colors are a plus!

Example : www.tmall.com





ITALY AND JAPAN : TAKE INTO ACCOUNT THE SHORT TIME ON PAGE

- Visitors in these countries are easily distracted: make sure you get straight to the point with each page. For your Japanese audience, **don't be shy about making all the key info instantly visible.**
- Spread out content over several pages to **encourage a deeper navigation.**

Example : www.rakuten.co.jp



FRANCE : IDENTIFY YOUR MOST POPULAR PAGES AND DUPLICATE THEM

- Spread content out over several pages: **visitors in France will consume the most pages during a session.**
- They also spend more time on a site than the global average, but will only focus on a page if the content is relevant: find out which pages are the most popular so you can optimize the sections of your site that drive interest and engagement.



GERMANY : KEEP VISITORS ENGAGED ABOVE THE FOLD

- Visitors in Germany are not inclined to scroll and will exit a page very quickly if they are not interested. **Make sure you're providing rich content and clear CTAs** and don't forget — keep the important stuff above the fold!

4. Menu, Search Bar, Carousel : search vs. window shopping

Analyzing interactions with the slideshow, search bar and menu is a great way to understand the intent of visitors on the homepage and to learn whether they are determined (search bar), seeking inspiration (slideshow) or are methodical (menu).



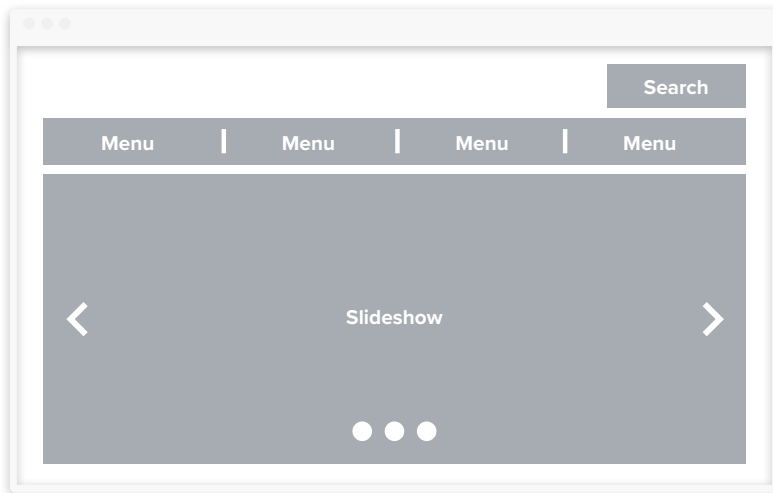
TOP OF THE HOMEPAGE: DIFFERENT ATTRACTIVENESS ON MOBILE AND DESKTOP

Visitors engage differently with the three main sections of the homepage (search bar, menu, slideshow) depending on the device.

Engagement is generally higher on desktop, **except in the UK where these sections drive 7% more interactions on mobile than on desktop.** Interesting fact: in France, the click rate on all three areas is over 50%.

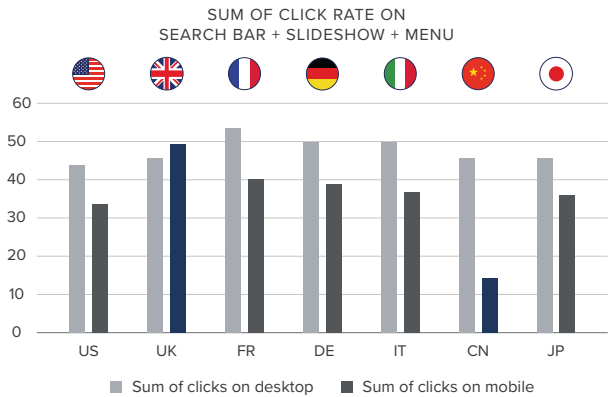
53%

average of search bar, menu, and slideshow click rates in France



On mobile, these areas drive 20% fewer interactions on average, except in China, where they are more or less neglected, **with 70% fewer interactions than on desktop.**

While mobile visitors in the UK are comfortable using the top of the homepage for navigation, the same cannot be said of users in China.



VISITORS IN THE US AND IN ITALY ARE NOT THAT INTO SLIDESHOWS

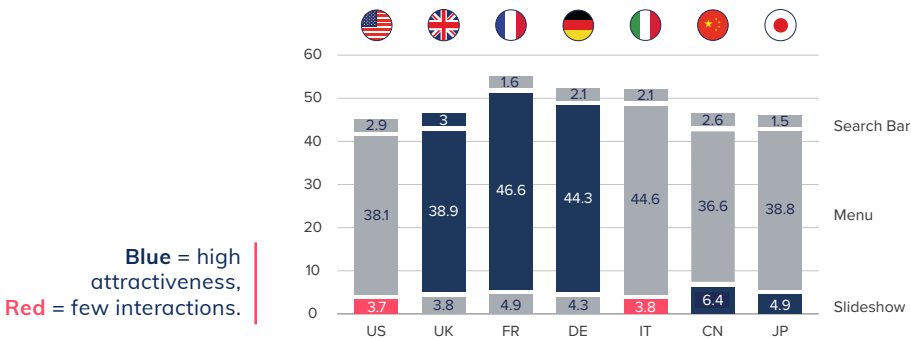
We already know that visitors in Italy are less inclined to follow recommendations during the acquisition phase, preferring more autonomous routes to a site (organic traffic, SEA).

+44%

use of search bar on mobile versus desktop in the US

Like their US counterparts, it takes more than just a slideshow to make them click. Indeed, **the slideshow click rate in the US is 40% lower than the global average, and in Italy, it's 20% lower.**

DESKTOP CLICK RATE ON SEARCH BAR, SLIDESHOW, AND MENU



Another interesting characteristic of the US visitor: the search bar click rate is 44% higher on mobile than on desktop.

The mobile search bar click rate is 44% higher than the desktop search bar click rate.

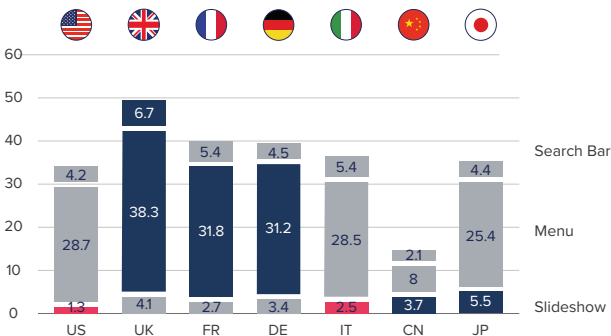
VISITORS IN CHINA AND JAPAN RESPOND WELL TO VISUALS

Users in China and Japan can't get enough of images and are the first to click on the slideshow. On mobile, the time to first click is 28% faster in China and a whopping 87% faster in Japan.

+87%

click rate on the mobile carousel in Japan

MOBILE CLICK RATE ON SEARCH BAR, SLIDESHOW, AND MENU



Blue = high attractiveness,
Red = few interactions.

On the other hand, we recommend avoiding menus and search bars on mobile. They are not well adapted to Japanese and Chinese characters and drive few interactions, and secondly, they get very little engagement compared to other countries. In China, the menu has 74% less engagement and the search bar has 60% less engagement than in the rest of the countries we analyzed.



VISITORS IN THE UK RELY ON THE SEARCH BAR AND MENU

Visitors in the UK are particularly determined in their browsing — they know what they want when they head to a site and they know how to get it. **The search bar holds no secrets for them, and they will use it almost 45% more than their global counterparts.** They are also much more likely to interact with the menu on mobile (+50%).

+45%

Search bar interaction in the UK compared to global average

THE MENU GETS A LOT OF LOVE IN GERMANY AND IN FRANCE

In France and Germany, visitors are methodical when it comes to digital window-shopping. Both countries prefer the menu above all else: +15% interaction in France and +11% in Germany.

+15%

Menu interaction in France compared to global average

MENU, SEARCH BAR, SLIDESHOW: THE GLOBAL PICTURE

	US	UK	FR	DE	IT	CN	JP
Search Bar							
Menu							
Carousel							

Frequent usage
 Very frequent usage

Little usage
 Rare usage





Recommendations



US, UK, AND ITALY :

DON'T FOCUS ON THE CAROUSEL; INVEST IN A REAL SEARCH BAR

- Visitors in these three countries are determined and know what they are looking for: **keep your slideshow to a minimum on mobile and desktop.**
- Use the space you have freed up to **feature an easy-to-use, sticky search bar on mobile** (not just an icon). To maximize value from this area, include an autocomplete function and optimize search results.
- On desktop, showcase bestselling items, highlight suggested products or categories and other search-related content (tutorials, blog posts, etc).

Example : www.prettylittlething.com





CHINA, JAPAN : INSPIRATION IS KEY

- **Visitors in Japan and China respond well to visuals.** Populate your slideshow with inspirational images and video content, and don't be afraid to use bold colors.
- Shorten the path to purchase by adding product links on the slideshow — consider adding more than one product/link in each image.
- The menu and search bar will not get much traffic so **opt for a discreet, sticky navigation bar** that remains visible during scrolling.



EUROPE : MAKE SURE THE MENU IS CLEAR AND OPTIMIZED FOR ALL DEVICES

- **Visitors in Europe will make good use of your menu** so keep it simple and be sure to include a clear visual hierarchy.
- **Make the navigation bar sticky** on mobile so it remains visible during scrolling.
- Optimize the menu for desktop by adding a hoverable dropdown menu.

Example : www.laredoute.fr

5. Product page : keeping visitors engaged and confident

The product page plays a key role in the buyer decision journey — number of visuals, vertical or horizontal interface, amount of information... The trick is to find the perfect formula for your local audience.



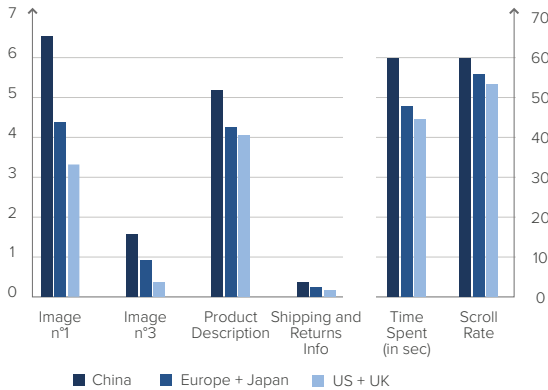
US, CHINA AND UK: THREE COUNTRIES, TWO APPROACHES

An initial analysis of the product page reveals that visitors in the US and the UK browse items completely differently than shoppers in China, who **click and scroll between 1.5 and 5 times more.**

Up to 5 times higher

click and scroll rate on product page in China compared to the UK and US

CLICK RATE, AVERAGE TIME SPENT AND SCROLL RATE ON PRODUCT PAGE



Visitors in China interact a lot more with the product pages — the opposite of US consumers.

VISITORS IN CHINA ARE ENGAGED AND HUNGRY FOR CONTENT

Users in China don't add products to their carts on a whim. They will **spend a considerable amount of time on the product page (+25%), are likely to click on the first product image (+49%) and to display further images (+109%).** If a third image is available, they will click on it (+81%). **Visitors in China also scroll more than their global counterparts (+8%).**

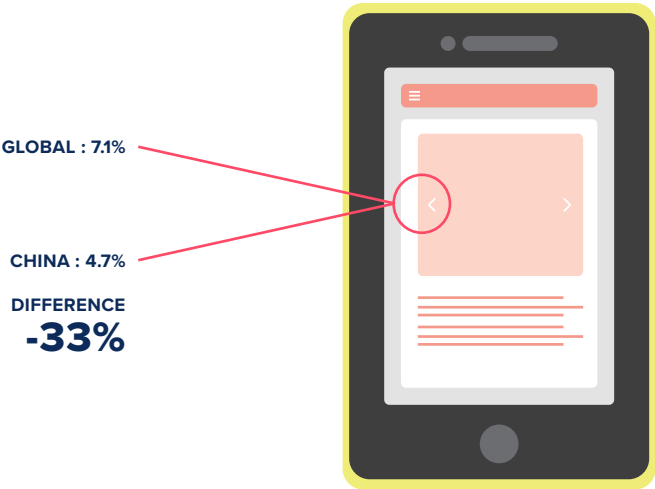


+95%

click rate on delivery
and shipping info in
China

We observed the same trend on descriptions. **Visitors in China will click 23% more on product descriptions and 95% more on the shipping and returns policy.** Hardly surprising considering many brands don't have physical stores in China, making shipping and returns very expensive.

MOBILE SLIDESHOW SCROLL RATE
(CALCULATED AS A %)



+165%

Average load time
of product page on
desktop in China

Another key difference: **visitors in China tend to interact with the slideshow less than their global counterparts** (-33% compared to the global average). There could be two reasons for this:

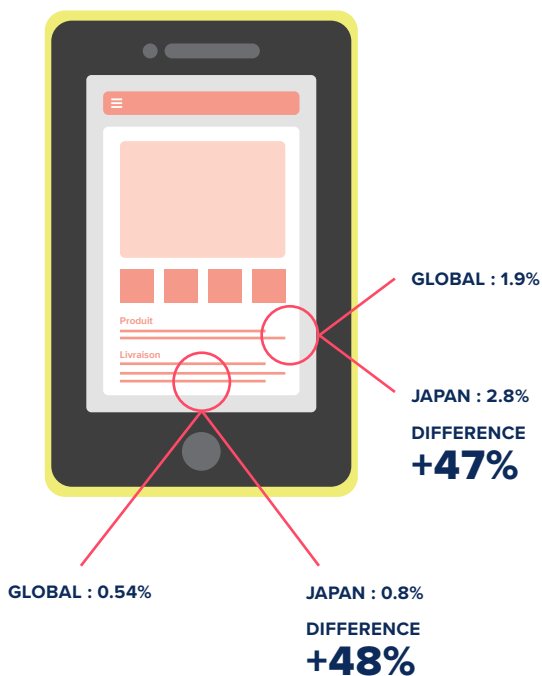
- Consumers in China prefer to scroll (+8%) than to swipe.
- Longer load times (**+165% on desktop and +77% on mobile**) deter visitors from flicking through images that may not have finished loading.

JAPAN: DON'T SKIMP ON DESCRIPTIONS AND DELIVERY INFO ON MOBILE

Mobile shoppers in Japan won't convert before they have all the product info they need and have read the shipping and returns policy. **Both areas get 50% more clicks than the global average.**



CLICK RATE ON PRODUCT DESCRIPTION
AND SHIPPING INFORMATION



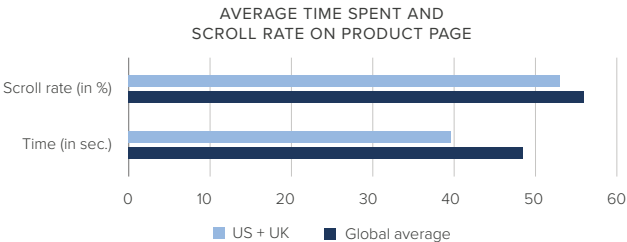
BRANDS HAVE WON CUSTOMER TRUST IN THE US AND THE UK

-24%

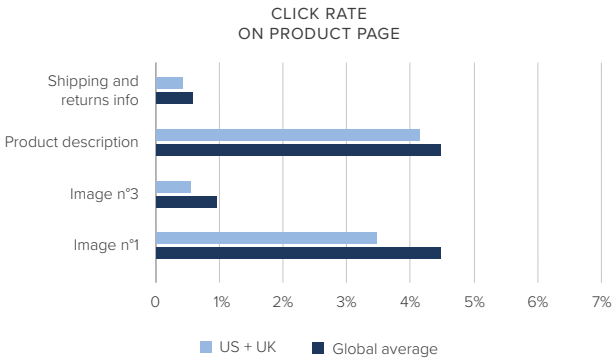
click rate of US consumers on the first product page image (compared to the global average)

In the US and the UK, the buyer decision journey is shorter and more focused. Visitors spend less time browsing product pages and don't interact as much with visuals: **22% fewer clicks on the first image and 53% fewer on the third, on average.**

Visitors in the US and the UK spend less time on the product page and scroll less.



Whether it contains information or visuals, don't count on US or UK visitors to interact with the product page.



Whether it contains information or visuals, don't count on US or UK visitors to interact with the product page. Visitors in these countries are also less likely to consume informational content: **-6% click rate on product descriptions and -28% click rate on shipping and returns info.** The challenge in the US and in the UK is to encourage visitors to add to their carts quickly, with little to no scrolling in as few clicks as possible.

ITALY AND GERMANY: THE IMPORTANCE OF VISUALS

Like visitors in China, consumers in Germany and Italy can't get enough of visuals. They click 7% more on the first image, 6% more on the second and 28% more on the third, across all devices.

The product description also plays a key role in the buyer decision journey of mobile users in Germany: **they click 11% more on this area than their global counterparts.**

**+10%
and +7%**

click rate on visuals
in Italy and Germany
(compared to global
average).

VISITORS IN FRANCE ARE MORE ENGAGED THAN THEY APPEAR

With fewer clicks on images, descriptions and information, and shorter session times, visitors in France appear at first glance to be unmoved by the product page.

And yet **the average time spent on the product page is 60% higher in France.** Visitors in France are highly engaged and focused on what is essential—the products themselves.

+60%

time spent on
product page in
France (compared
to global average).



Recommendations



US, AND UK : GET TO THE POINT



- **Uncluttered, simple design, minimal text, large images, little to no scroll, minimal interaction:** think of your product page as... a product, and make sure it can be consumed easily and quickly.
- **Consumers in the US and UK will not bother reading your shipping policy;** they have come to expect free returns and quick and inexpensive/free shipping.



CHINA : CONTENT, CONTENT, CONTENT (PREFERABLY VERTICAL)

- Forget all about horizontal content: **visitors in China expect a vertical interface and will gladly scroll to satisfy their curiosity.**
- **Pack your product page with content to boost engagement:** visuals, descriptions, reviews, bundles, promos, affiliate links, comparisons, articles, QA, cross-sell etc.
- **Pay attention to the shipping and product info;** using local delivery platforms may hike up the cost of shipping and returns, so reassure customers.
- **Optimize your site for shorter loading times.**

Example : www.jd.com





GERMANY, JAPAN : HIGHLIGHT PRODUCT AND SHIPPING INFO



- Visitors in Germany and Japan pay close attention to product descriptions and shipping and returns policies— particularly on mobile. Make sure these are easy to read on a small screen.



GERMANY, ITALY : DON'T SKIMP ON PRODUCT VISUALS



- Visitors in Italy and Germany love imagery. **Make sure to include as many product images as you can** (at least 4), as well as a zoom functionality. Slideshow arrows should be clearly visible.
- Consumers in Italy prefer vertical navigation, while those in Germany tend to favor horizontal, carousel-style displays — make sure you cater to both.



FRANCE : STRIKING A BALANCE BETWEEN FEW INTERACTIONS AND HEAVY CONTENT CONSUMPTION

- Visitors in France will spend a lot of time on a page and yet they tend not to interact with its elements.
- **Display a summary of content above the fold with anchors that lead to info further down the page.** Take advantage of your visitors' willingness to spend a long time on the page by displaying more detailed content beneath the fold.

Example : www.clarins.fr

6. Data protection laws and privacy concerns

Once a customer has decided to finalize their order, they have two options: log in or proceed as guest. Our analysis suggests visitor behavior at checkout is directly linked to a country's information privacy laws.

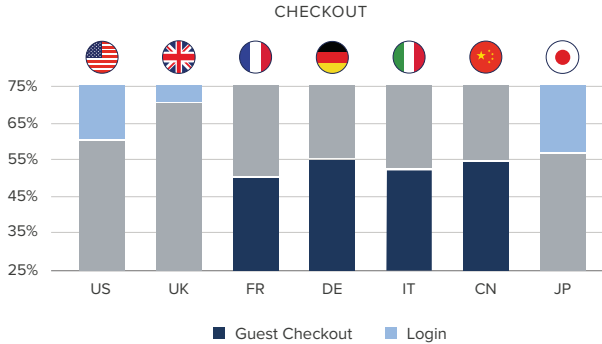


GUEST CHECKOUT IS HIGHLY POPULAR IN THE US, THE UK AND JAPAN

Visitors in the US, Japan and the UK prefer to check out as guests (more than 55%).

+19%

visitors in the UK who select guest checkout (compared to the global average)



Privacy laws are not all that strict in these countries, which is one of the reasons why many visitors elect to check out as guests. Many consumers are reluctant to share information they feel could be used by brands for other purposes.

IN OTHER COUNTRIES, VISITORS ARE MORE LIKELY TO LOG IN

In countries with more stringent data protection regulations, visitors are less reluctant to log in. **In France, Italy and Germany, around 50% of visitors will log in to complete a purchase.** A 2018 report by Kartar Media found that only 56% of consumers in China endorsed active personal data regulation.





Recommendations



US, UK, AND JAPAN :

MAKE GUEST CHECKOUT THE DEFAULT OPTION



- With so many visitors preferring to check out as guests, make this your default option and save login for a later stage in the process.
- Provide clear reassurance messaging at checkout.



FRANCE, GERMANY, ITALY, AND CHINA :

SIMPLIFY THE LOGIN PROCESS



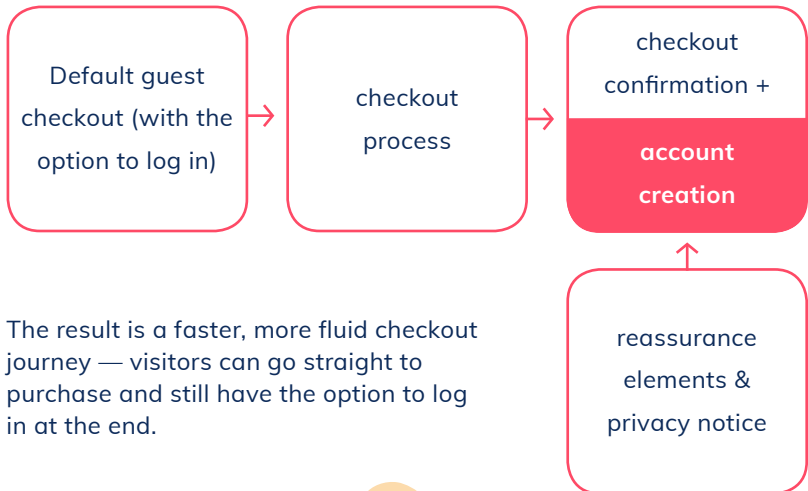
- Nothing will hurt conversions like a form visitors don't want to fill out or can't. Reduce the number of fields and enable autocomplete.
- Give visitors a variety of login options (QR codes, social, Google etc) to shorten the path to purchase.
- Offer a variety of payment methods:
 - In the US and in Europe: credit cards (consider adding scanning), PayPal, VisaPay, ApplePay, GooglePay, direct debit, pay later and even paying upon delivery (Germany)
 - In China: bank card, AliPay, WeChatPay, Tenpay, Unionpay
 - In Japan: bank card, Konbini, direct debit, eWallets, PayPal, pay later
- Make sure logged in visitors who are already logged in remain logged in on their next visit.
- Include reassurance elements at checkout (especially for your German audience).



US, UK, AND FRANCE : SHIPPING AND RETURNS ARE CRITICAL FOR GOOD UX

Today, a good shipping and return policy is a key part of the UX.
Make sure to offer:

- At least two delivery speeds
- A free delivery option (including in-store pickup)
- Free, no-questions-asked returns



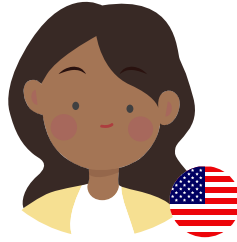
The result is a faster, more fluid checkout journey — visitors can go straight to purchase and still have the option to log in at the end.



7. Takeaways:

key behaviors by country





UNITED STATES: “I KNOW WHAT I WANT”

US visitors know what they’re after, know where to find it, and are more than happy to click the “purchase” button.

With organic search driving the bulk of traffic, one of the lowest number of pageviews and scroll rates of all the geographies we surveyed, a strong reliance on the search bar and the highest conversion rate observed — US consumers are expert shoppers and are highly determined when embarking on a purchase.

With the backdrop of a brutally competitive marketplace, they have become used to high standards of delivery and returns, and rarely bother to read terms and conditions at checkout. While they are willing to spend some time browsing the homepage, their product page visits are much shorter, perhaps because they know they can always return later for more info. Concerns over data privacy means they will often opt for guest checkout instead of logging in.

COMPARE TO GLOBAL AVERAGES:

CLICK RATE
ON PRODUCT
IMAGES:

-25%

CLICK RATE
ON PRODUCT
DESCRIPTION:

-19%

CLICK RATE ON
DELIVERY AND
SHIPPING INFO:

-59%

CONVERSION
RATE ON
DESKTOP:

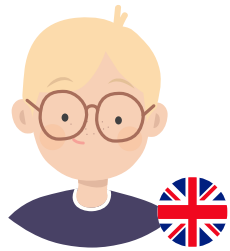
+25%

CONVERSION
RATE ON
MOBILE:

+25%

TIME SPENT
ON THE
HOMEPAGE:

+19%



UK: PRIVATE AND DETERMINED VISITORS

Visitors in the UK are open to suggestions during the acquisition phase (think social media and email marketing), but will follow their hearts once they are on your site.

Once they land on your site, they tend to make up their minds quickly. Browsing on mobile is second nature to them, and they use the search bar or menu to head straight to the product or information they are interested in, without wasting time on other pages. They're not big fans of scrolling, and they don't spend minutes agonizing over whether or not to add a product to cart — there's no need for multiple images or lengthy descriptions. They don't pay much attention to delivery and returns conditions, safe in the knowledge that most brands in the UK will guarantee quick shipping and no-questions-asked returns.

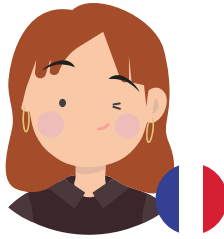
Concerned with online privacy, they will often pick the guest checkout option, they expect third party payment solutions to be included at checkout so they can skip entering their credit card details.

COMPARE TO GLOBAL AVERAGES :

CLICKS ON THE
SEARCH BAR
+45%

CONVERSIONS ON
MOBILE DESKTOP
-23%

OPT FOR GUEST
CHECKOUT
+19%



FRANCE: ENCOURAGING A DEEPER NAVIGATION

It's true that visitors in France are systematic and efficient in their browsing but that doesn't mean they won't let themselves be swayed.

Consumers in France know what they want but are not immune to influence by paid advertising (including SEA and paid social). Once they are on your site, they will spend a while there and will happily hop from one page to another, consuming more pages than any other country we analyzed.

The inherent contradiction of French consumers also comes through their menu and slideshow interaction. With their methodical approach to shopping, they will automatically head to the menu and will sometimes take a detour via the slideshow.

This "why not" mentality is also found on the product page, where visitors will spend a significant amount of time browsing content without taking further action.

Visitors in France also tend to log in at checkout, perhaps saving coveted items for a future shopping spree.

COMPARE TO GLOBAL AVERAGES :

TIME SPENT
ON PRODUCT
PAGE

+60%

PAGEVIEWS
DURING A
SESSION

+8%

CLICKS
ON THE
MENU

+15%



GERMANY: VISITORS ARE LOYAL AND CAUTIOUS

Top of your German visitors' behavior checklist? Cautiousness and analysis. One statistic pretty much sums up the profile of the average German consumer: the share of direct traffic. Aside from SEO and SEA, this is the main source of traffic in Germany, and the share of traffic acquired via this channel is much higher than in other countries. So what does it say about German users? That they are loyal and will only give their trust to a small number of brands whose sites they will access directly.

Preferring the menu over anything else, consumers in Germany methodically look for the product they're after without getting distracted by the slideshow. On the product page they will pay special attention to visuals, and will not scroll endlessly through content. Many of the sites we analyzed included reassurance elements at checkout, including a privacy policy and a secure payment guarantee.

This abundance of caution perhaps explains why visitors in Germany have one of the lowest conversion rates of all the countries we surveyed.

COMPARE TO GLOBAL AVERAGES :

CLICKS ON
PRODUCT
DESCRIPTIONS
(MOBILE)

+11%

CLICK RECURRENCE
ON PRODUCT
DESCRIPTIONS
(MOBILE)

+8%

CLICKS ON
PRODUCT
VISUALS
(DESKTOP)

+12%



ITALY: VISITORS WANT A HIGHLY VISUAL UX

Consumers in Italy expect unique branded content and are very picky when it comes to products.

They rely almost exclusively on search engines to get to a website. Just as determined once they land on your site, Italian visitors use the search bar to get straight to what they are looking for, shunning the slideshow. Once they have found the product they're after, they won't spend forever on a page but will head directly to the information that speaks to them the most, i.e. the images. They will typically click through each available image, and will scroll down the page to dig up more product visuals.

Italy has the lowest conversion rate of all the countries we analyzed, meaning brands have their work cut out to convert these extra-demanding shoppers.

COMPARE TO GLOBAL AVERAGES:

CLICKS ON
PRODUCT
VISUALS

+10%

CLICK RATE
ON SEARCH
BAR

+15%

CLICK
RATE ON
SLIDESHOW

-20%



**CHINA: VISITORS ARE LOOKING FOR
HIGHLY VISUAL, MOBILE-FRIENDLY CONTENT**

What do visitors in China want most of all? Content and images. Where do they want it? On their smartphones. China is unique in that its users have a constant appetite for information-heavy, visually rich content.

Shoppers in China love images. Visitors will click on inspirational content if you showcase it (for example, display banners on Brand Zone). They will also take the time to read product information and descriptions, scrolling all the way to the bottom of the page if they have to.

They are also happy to log in at checkout, provided your platform supports the checkout functionalities they have come to expect.

If the design of your landing page is minimalistic or sober, however, you risk losing your customers from the start. And if you forget to include a menu on your mobile site, you can forget about conversions.

COMPARE TO GLOBAL AVERAGES:

BOUNCE RATE

+48%

MOBILE TRAFFIC

+13%

SCROLL RATE

+8%

CLICK RATE ON
PRODUCT IMAGES

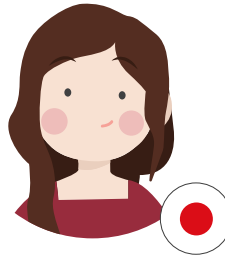
+16%

ACQUISITION VIA
DISPLAY

x6

CLICK RATE ON
HOMEPAGE SLIDESHOW

+28%



JAPAN: HIGH VISITOR EXPECTATIONS

Japan is a mature market and visitors here have extremely high standards when it comes to customer experience.

Japan also leads the way in mCommerce and when it comes to acquisition, relying very little on paid channels.

With a short average time spent on page, a very high number of pageviews and a high scroll rate, visitors in Japan have high expectations and will exit your site at the first sign of friction. If a product on the slideshow catches their eye, they will form an opinion soon after clicking on the image.

Our analysis also revealed a high number of interactions on the product and delivery information before the add to cart phase.

COMPARE TO GLOBAL AVERAGES:

NUMBER OF
PRODUCT PAGES
VIEWED DURING
THE SESSION

+20%

MOBILE
TRAFFIC

+17%

SEO
TRAFFIC

+34%

Interview



Alexandre Anzo is Head of Design at Emakina, and specializes in strategic, product and digital design. He has more than 20 years of experience leading global teams and creating memorable online and offline brand experiences.

Contentsquare : Consumers in the US are compulsive shoppers, visitors in Germany will read your terms and conditions beginning to end... There are many clichés about digital behavior around the world. How well do businesses really know their customers? What tools can they use to bust these behavior myths, and access a deeper understanding of visitors?

Alexandre ANZO : What I've been noticing for years makes me want to laugh and cry at the same time... In reality, most businesses — including big companies and leading brands — only have a very theoretical understanding of users. What they consider reality is more often than not built around marketing targets and approximate, one-off observations that are seldom factual.

Thankfully, many IT, digital, retail and marketing teams understand that you cannot have one approach to brand experience and that the same solutions will not work for everyone. That's why they choose tools and a tech stack that allows them to collect and analyze data — very often they rely on Google Analytics. These however, are often basic and underused. The little data that is available often stays stored in databases, is never made “smart” and seldom gets leveraged to adapt the experience to reality or to visitors.

I frequently stumble upon clients' “data reports” revealing that “we have more mobile visitors than desktop visitors” and “many

of our customers have iPhones"... This is where Emakina comes in, with advice on design improvement and customer intelligence recommendations on how to capture and analyze data to create real value.

CS : Once the data has been collected, how can businesses go about adapting their brand message to different visitor behaviors?

AA : Many businesses still have a very naïve understanding of the digital product — it's like a retailer opening yet another store, but this one is online... Too often I hear things like, "it was very expensive, almost as much as a store," or "it's the biggest store in our network." Their concept of sustainability when it comes to these digital assets (for example, an eCommerce site) is still based on these old models, including budgetary ones — the "you build it and you run it" approach.

It's crucial to think of the brand as part of the larger picture of understanding and optimizing digital touchpoints.

It's much easier and cheaper to identify a specific behavior, to come up with an idea and to test it on a website than to do this in your flagship store on the Champs-Élysées... You can decide who to show a new version of the page to, at what time, in what regions, you can monitor its performance for a specific journey, or acquisition channel, and get there little by little. In short, you can have an agile, analytic and user-centric approach — i.e. a designer's approach.

CS : Can you think of a successful, recent UX adaptation — aside from just adapting the language?

AA : The first step in localizing digital products is often translation. Often it's not a huge undertaking but when you consider for example adapting French-language apps and services for a Japanese-speaking audience, you can imagine how intertwined the various elements of the experience are — be they visual, semantic, symbolic etc.

Here at Emakina we've put together a team of developers and designers (UX, UI, brand, content, motion, back-end, front-end) specifically for this, and we encourage a design sprint approach and an iterative methodology to better localize the experience.

That's what we did when we localized the eCommerce site of the brand Courir for the Spanish market. We made a lot of small changes to take into account local omnichannel preferences, including modifying pickup and delivery options, hence the entire purchase funnel.

We also adapted the visual design to showase products in line with the behavioral patterns we observed, and to improve cross-sell.

In this case, capturing and analyzing user behavior data is the only way not to feel your way blindly through the process of building a brand experience.



Emakina Group is one of the top three independent networks of full service European digital agencies. We are constantly adapting our services to the latest technological advancements and industry evolutions, and employ only the most talented specialists. With more than 950+ experts in 12 countries across 3 continents, we fight daily alongside our customers and their brands to boost their User Equity, build high performance digital businesses and deliver outstanding user experiences.

emakina.com



Interview



Alexandre Crazover is the Co-Founder of Datawords, a company he created in 2000. An innovative player and global leader in multicultural technologies, Datawords is specialized in optimizing, updating and ensuring the seamless deployment of international digital campaigns. Alexandre lives in New York.

Contentsquare : Many brands' localization strategy is often limited to translating content into the local language. What are the other challenges of adapting your digital assets to different international audiences?

Alexandre CRAZOVER : The success of a global digital strategy hinges on many factors. Beyond language, which is a key element of localization, it's also crucial to adapt your brand and content to the local context — i.e. the cultural, societal, geopolitical context of the country in question. It's also vital to consider local trends and to make sure you're using the appropriate digital platforms to help your strategy succeed.

CS : How can businesses best empower their teams to meet these localization challenges?

AC : In order to keep your branding consistent and cohesive, it's important that your local operations coordinate with the brand headquarters. Adapting to a market doesn't mean sacrificing the brand image. You have to equip your team with the right tools, and the right platforms to deploy your strategy in the best possible way. Every culture has its own way of leveraging technology. Hosting solutions, platforms, search engines, social media channels vary from country to country. Brands must take these constraints into account.

CS : What advice would you give a company planning its localization strategy?

AC : Don't overlook local specificities, always combine culture with technology, and know how to set yourself up for success. Combining cultural expertise with a background in digital technology is key. Here at Datawords we're always recruiting engineers and we've developed a suite of proprietary tools to accelerate our clients' localization campaigns. It's also one of the reasons we decided to partner with a leader in experience analytics like Contentsquare.

CS : Do you have an example of a successful localization strategy?

AC : Benefit Cosmetics! Benefit is an American cosmetics brand (and a subsidiary of LVMH) who we've been helping develop a digital presence worldwide. The company approached Datawords because it wanted to keep its brand message and identity coherent, manage content across geographies, and improve its brand visibility and SEO. Mission accomplished! The brand is now present in 42 countries and its local sites boast more than one million new visitors each year.

DATAWORDS
e-Multicultural Technologies

Datawords is an innovative player and leader in e-Multicultural technologies, with a portfolio of clients in the Fortune Global 500. Datawords recorded a \$75m turnover in 2018. Vanksen, Digiprod, 87seconds and Wezen are members of the Datawords Group.
datawords.com

Conclusions

There are countless ways for customers to navigate your website. Acquisition, menu interactions, product page consumption, checkout behavior — how consumers enter and browse your site varies tremendously from one country to another.

Adapting the digital experience to local markets is a key aspect of a successful globalization strategy. The first step to creating experiences that remain relevant and engaging in all geographies is understanding the behavioral trends and patterns of your local audience.

How you position your brand is crucial too, but you can maintain consistency in branding even while customizing your content for different markets.

And of course, don't forget to anticipate the technical challenges you'll encounter and the best processes to implement when building (and maintaining) an eCommerce presence in multiple countries.



ABOUT US

Contentsquare is a digital insights platform that helps businesses understand how and why users are interacting with their app, mobile and websites.

We compute billions of touch and mouse movements, and transform this knowledge into profitable actions that increase engagement, reduce operational costs and maximize conversion rates.

To book a demo:

www.contentsquare.com

contact-us@contentsquare.com

HOW WE DO IT

CUSTOMER JOURNEY ANALYSIS

Identify key customer journeys, fix broken paths, and create ideal ones that keep visitors engaged all the way to conversion.

ZONE-BASED HEATMAPS

Measure the performance of each element of digital content, and see how it contributes to conversion and revenue.

AI ALERTS

Never miss a thing — if something noteworthy is happening on your site, we'll let you know about it so you can reduce the time to action.

RETROACTIVE SEGMENTATION

Define behavior segments and conversion goals retroactively without the need for pre-planning tags for a “no regrets” approach to optimization.

CS LIVE

Tired of looking at dashboards? Simply activate the CS Live Chrome browser extension to display UX KPIs directly onto your site.

CS FOR APPS

Analyze gesture-based KPIs like Tap, Flick, Drag and Swipe to reduce app frustration and optimize paths to conversion.



Notes

[illegible]



CONTENTSQUARE

www.contentsquare.com

