

Pursuing web performance

Industry snapshot

2017





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ICON in partnership with Katanya presents a benchmark analysis of web performance between 45 ICON Member Firms across Australia and New Zealand.



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SMOOTH,
FUN & FAST?
NICE.

A brief note from the President

Let's face it, if your website is slow for your local audience or indeed any market you're targeting then you're on the back foot from the first click so to speak.

This benchmark analysis is a snapshot of web performance in Professional Services and B2B markets in Australia and New Zealand. It has been prepared for our 2017 ICON Australia and New Zealand Conference.

It is well recognised that slow sites lose visitors and have lower conversion rates. This report looks at whether your site is quick loading and is as fast in Shanghai as it is in Sydney. And it looks at whether your hard work developing content and thought leadership is returning results for you on social media and search engines.

This report highlights where the industry is doing well and opportunities for improvement. This is our first piece of thought leadership under the new ICON brand.

We encourage you to peruse it and see what insights you can explore further to help your organisation.

Alex Grell
President, ICON

**A slow website is
probably costing you
business leads.**

What is web performance?

In short, it is about how fast your website downloads and displays. Do pages download in less than two seconds on desktop and four seconds on mobile? Do the pages display quickly?

More broadly, is it resonating with your audience? Are they following your social media accounts and linking to your posts? And finally (but beyond the scope of this report) are visitors engaging on your site and converting into leads?

And why is it important?

For B2B markets organisations, the end goal of a website is often not direct online sales, but it is to influence the influencers and other stakeholders. It is to increase an organisation's reach, to sign-up visitors to newsletters, to new tools, products and most importantly to make contact.

Slow websites lose visitors. Slow websites also rank lower (for being slow) on search engines. Speed will directly impact an organisation's awareness and conversion efforts. Industry leading studies from Google, Akamai and others show time after time that sites taking longer than two seconds on desktop and four seconds on mobile lose up to 50% of their conversions.

Web performance is important because poor performance is undermining your other marketing efforts and the cost is business leads.



15% OF SITES
ARE FAST. THE
OTHERS? NOT
SO MUCH.



**CRITERIA
& INSIGHTS**

How are we performing collectively? And are we performing well?

About this study

This study was created to showcase the web performance of professional services and B2B markets organisations as a collective, to find patterns, and to identify the top performers.

It was created for the ICON's Australia and New Zealand Conference to help support and advance the sector's performance in the digital space.

The websites of 45 mid-tier and large firms were analysed as part of this benchmark analysis providing a snapshot of the sector.

The analysis was conducted during September 2017.

ICON member firms across Australia and New Zealand with five or more members were asked to take part in the study. The study has benchmarked the web performance of those firms across a number of performance metrics

Wherever possible local (and not international) websites and social media accounts were used.

The data gathered through a large number of tests has been consolidated into a number of straight forward insights and recommendations.

It should be a conversation starter and we hope it provides some food for thought.

Benchmarking criteria

Each organisation was assessed against a number of key areas. These measured the speed of site delivery, the volume of data involved and the site's level of content authority and popularity on social media. Each area includes multiple measures and data points consolidated into five plain English categories.

⚡ Page speed

A fast loading site is important. For this category we looked at two core sets of measures, the first being the amount of time that it takes from when a user requests a new page to the moment the above-the-fold content displays. The second is the amount of time it takes for the page to fully load.

★ Relative speed in China

For many firms China is a significant target market. This category looks at how fast the sites perform there. Major cities in China have fast internet but it can vary, so we look at the average performance across China and compare it with the site's performance in Sydney. That is: Is the site as fast in China as it is in Sydney?

🔗 Social media follows

Followers on social media extend an organisation's reach and ability to quickly amplify their message. For this category we've looked at LinkedIn, Facebook, Twitter, YouTube and Instagram and identified the organisations with the most followers. Where found, we've used Australia and New Zealand accounts.

🔗 Inbound links

Links from other sites to an organisation's site indicate to search engines that it is trustworthy as an authority on that topic. Links from websites with a higher authority of their own carry even more clout. This category looks at the number of inbound links (also called back links) to each site.

💡 Page weight

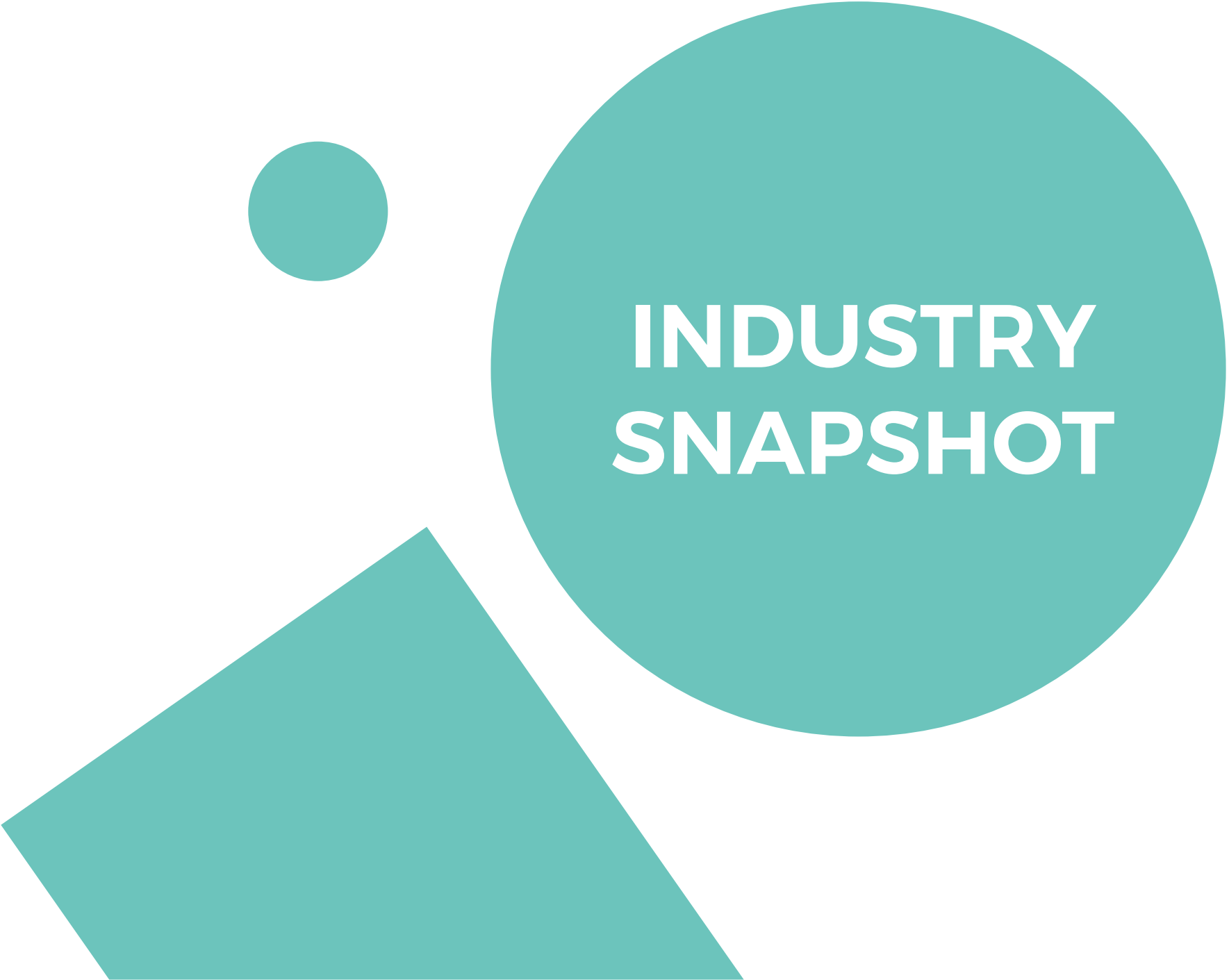
File sizes and the number of file requests impact how long a web page takes to load. Pages include html, JavaScript, style sheets, rich media and more. Every byte of data adds to a page's weight and each request adds delays and bloat. This category looks at the volume of data and number of requests.

Recommendations

- 01** Use a CDN. This will help make sure that your site loads quickly in other markets, in particular those which are geographically a long way from your web servers. (And could reduce your infrastructure costs too.)
- 02** Avoid embedding resources from sites blocked in China. Google, Twitter and YouTube are blocked in China, thus if you directly embed them into your site, it will hinder your site's performance.
- 03** Speed up how quickly your page displays with lazy loading. This allows for the key files and assets to load first and for other elements to load after the page initially renders. For example, video backgrounds and images that are not 'above the fold'.
- 04** Give more love to your mobile sites. Ensure it is only loading what is essential and use lighter and device-appropriate images and backgrounds. Mobile visitors likely have different goals in mind, look to your metrics and work these into your site's design.
- 05** Work with your developers and graphic designers to cut the number of files that each web page requires and optimise graphics, video and code so that they are sharp but load quickly.
- 06** Links from other sites to your site help to build SEO domain authority. Look for opportunities to create non-reciprocal links. For example repost content from your site to other channels and link back to your page.
- 07** This is definitely one for your IT team! Enable SSL and then HSTS. These are security measures that make sure data submitted to your site is secure. It provides visitors extra confidence and will avoid Google flagging your site as 'not secure'.
- 08** Could a single domain and/or single account per social media channel work for your brand? This can help with SEO and gathering social media followers but, depending on your organisation's business, could be complicated with governance concerns.



89% OF
SITES ARE
NOW MOBILE
FRIENDLY!

The image features a minimalist design with teal-colored geometric shapes on a white background. A large teal circle is positioned on the right side, containing the text 'INDUSTRY SNAPSHOT' in white, bold, uppercase letters. To its left and slightly higher is a smaller teal circle. In the bottom-left corner, there is a teal triangle pointing towards the top-right. The overall composition is clean and modern.

**INDUSTRY
SNAPSHOT**

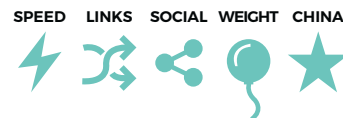
**Do our digital efforts
fully reflect the
promise of our brands?**

Good looking?

In this digital age, a firm's homepage is probably its most visible brand 'touch-point'. These snapshots reflect how each participating firm's website looked on both desktop and mobile at some point during September. These show the diversity in design and how each firm promotes themselves. It provides a fascinating insight into how each digital 'front-door' looks side by side.

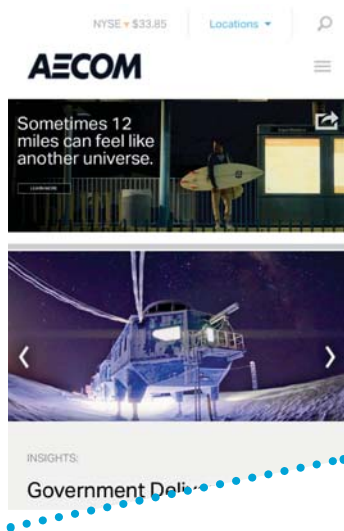
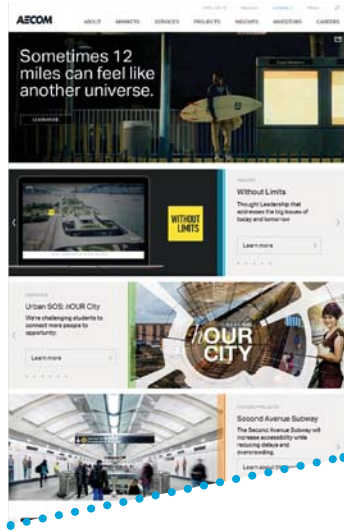
High performing?

The top 10% of performers in each category (page speed, page weight, inbound links, social media followers and performance in China) are marked with badges.

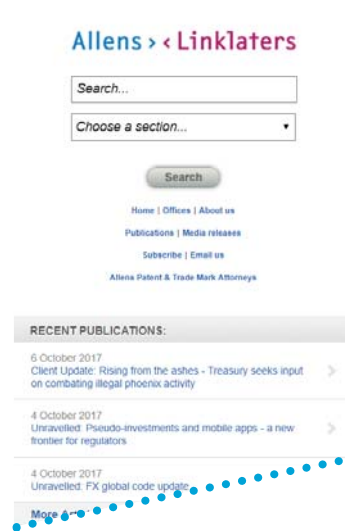


Each badge is a signal that the firm is performing well in comparison to the other firms. They are an indicator that current initiatives are working, should be continued and built upon.

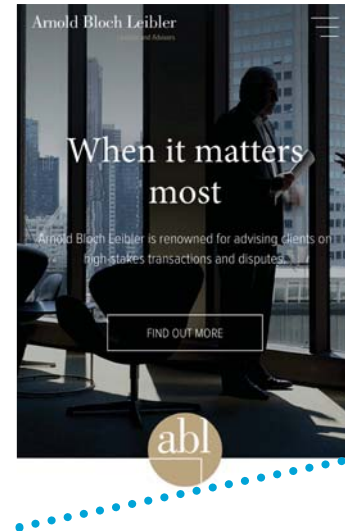
AECOM



Allens

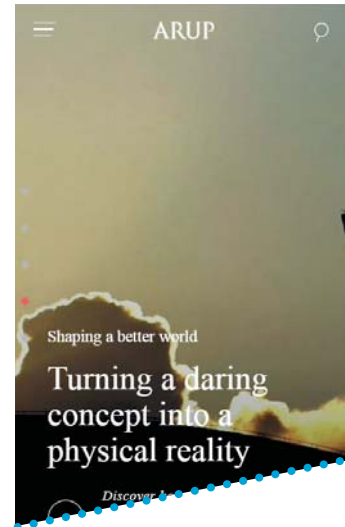
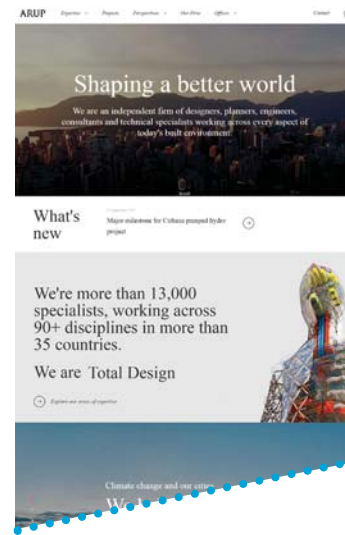


Arnold Bloch Leibler





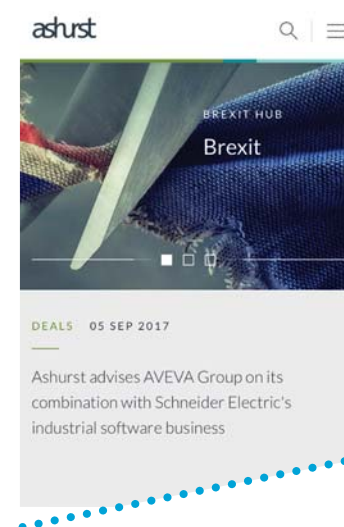
Arup



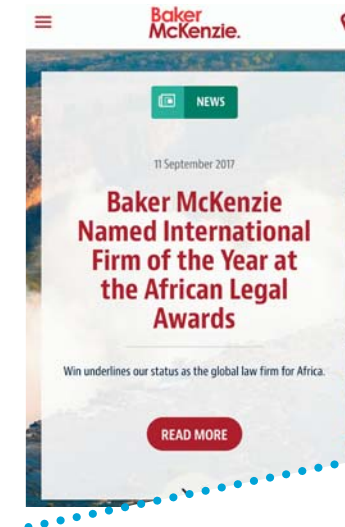
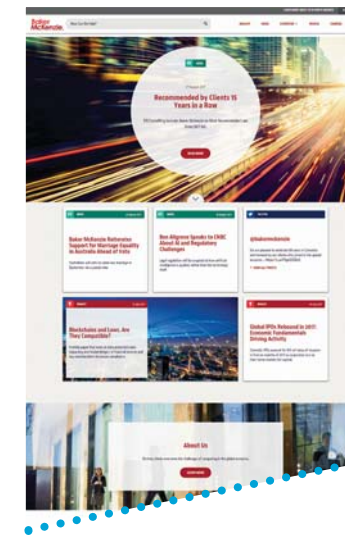
SOCIAL



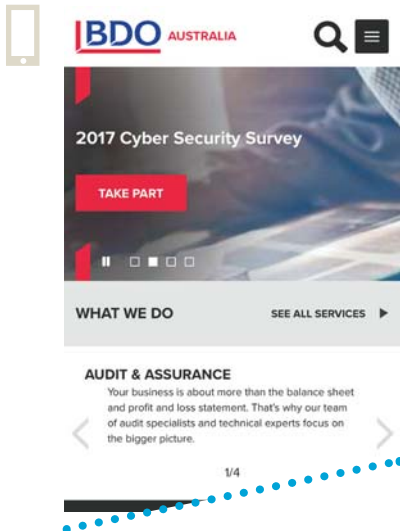
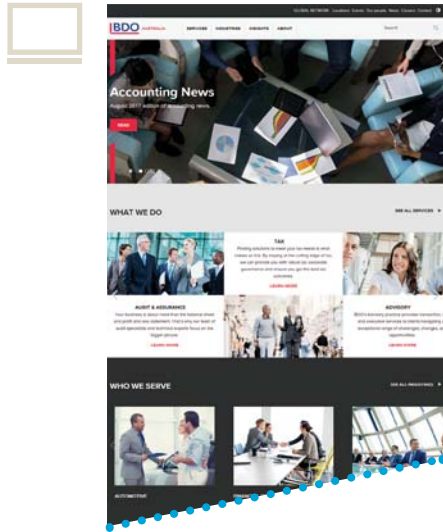
Ashurst



Baker McKenzie

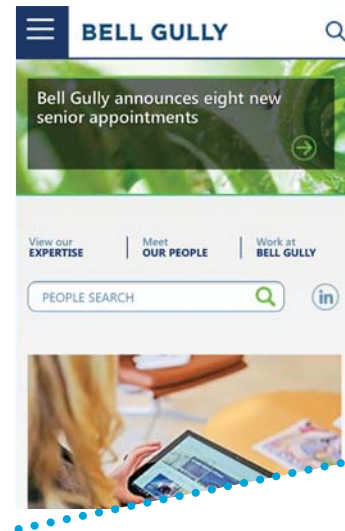


BDO



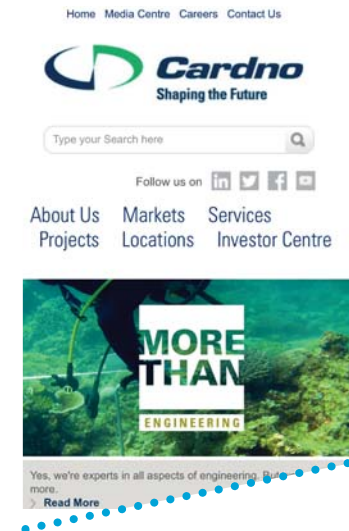
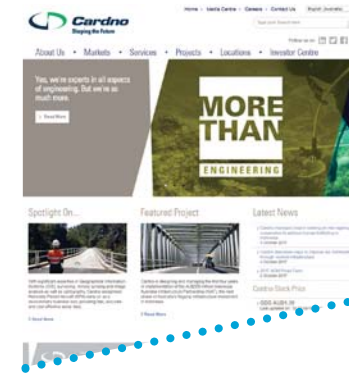
CHINA

Bell Gully

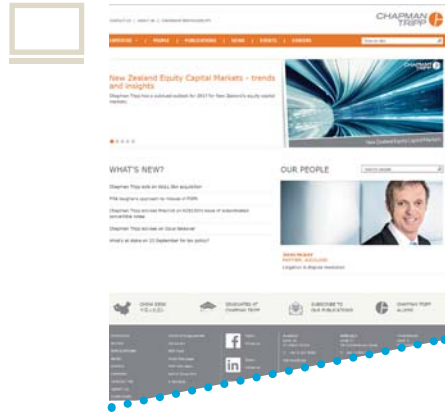


SPEED

Cardno



Chapman Tripp



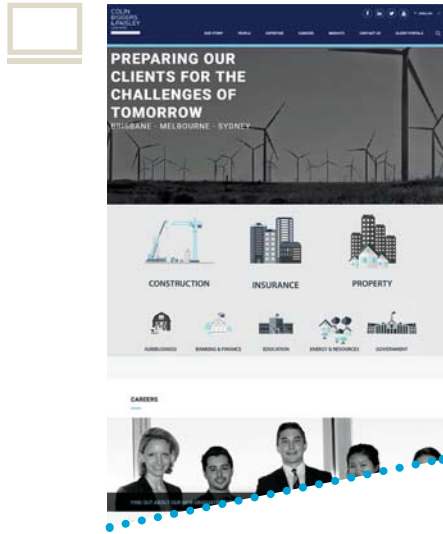
Clayton Utz



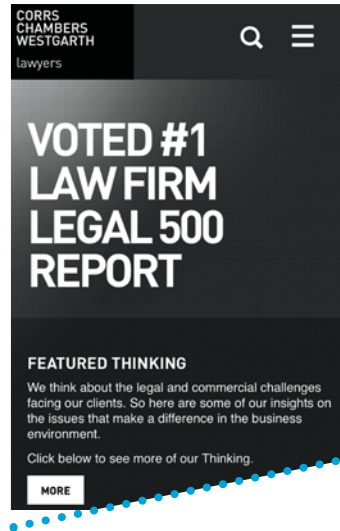
Clyde & Co



Colin Biggers & Paisley



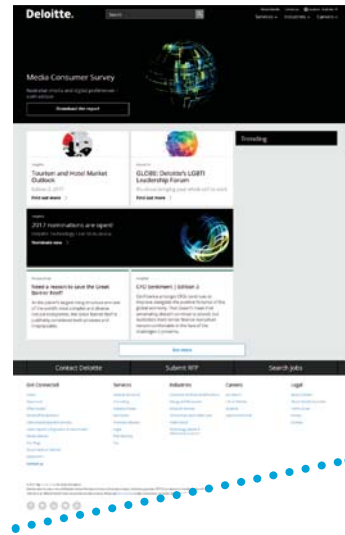
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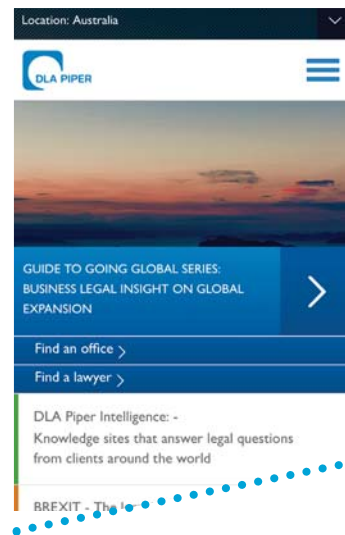
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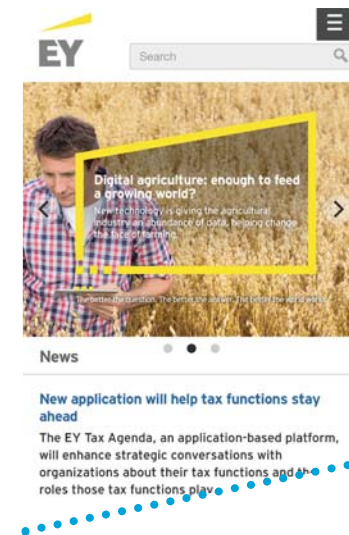
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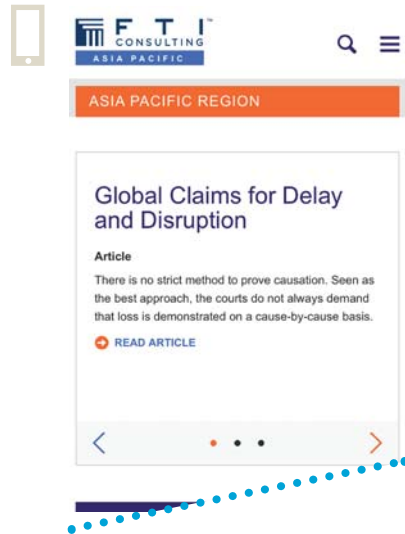
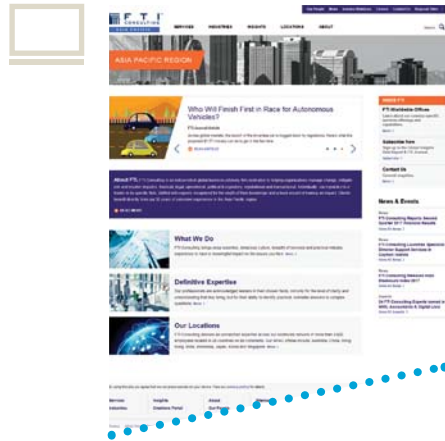
DLA Piper



EY



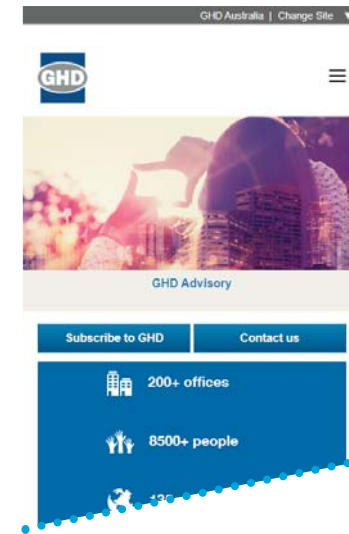
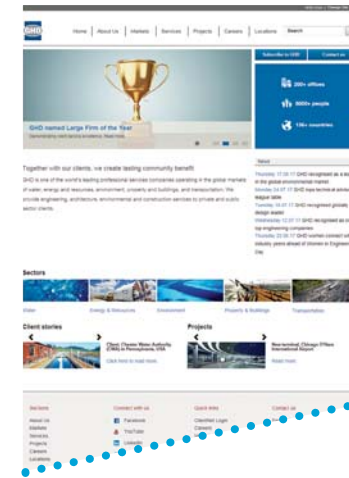
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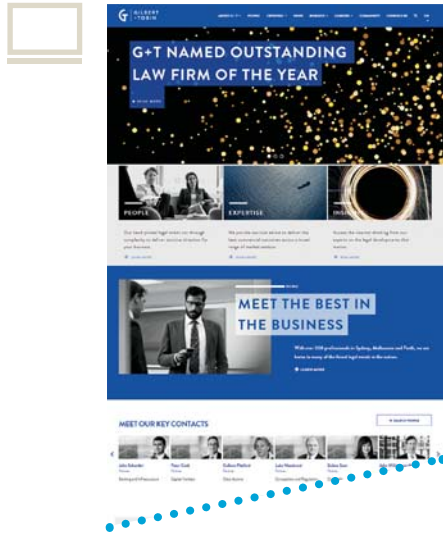
Gadens



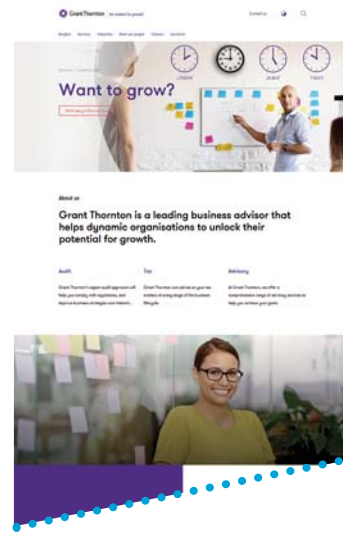
GHD



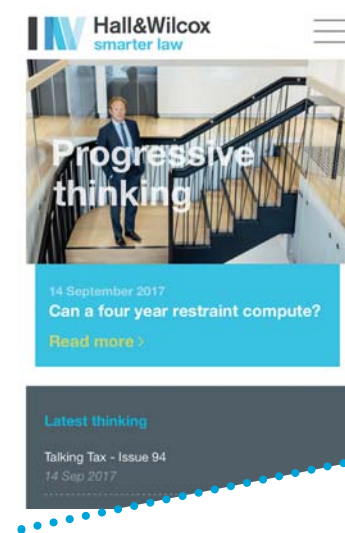
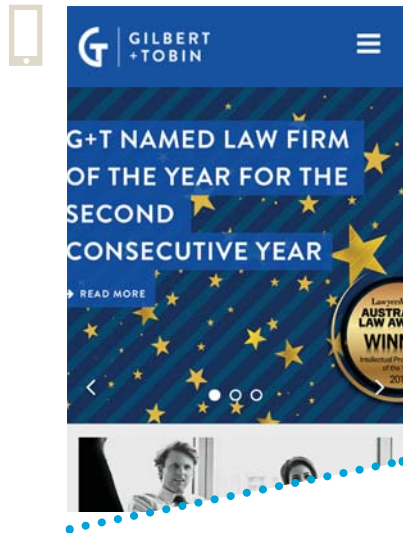
Gilbert + Tobin



Grant Thornton



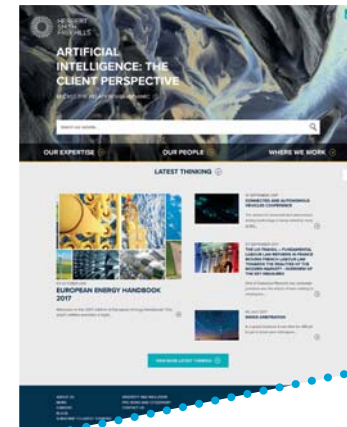
Hall & Wilcox



Henry Davis York



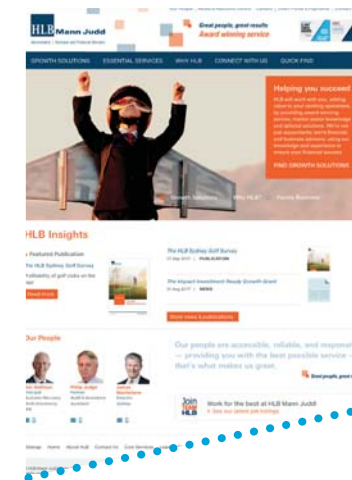
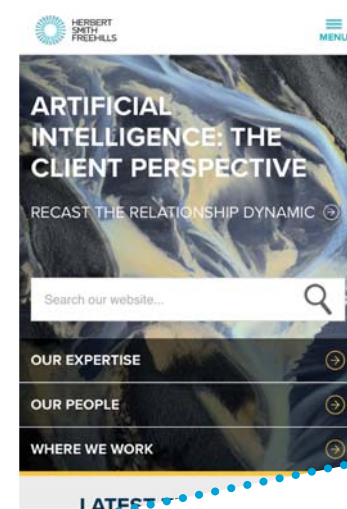
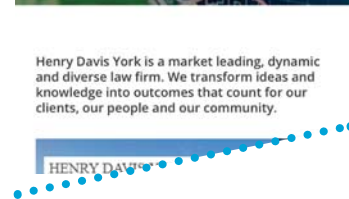
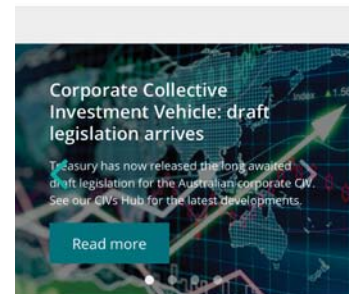
Herbert Smith Freehills



HLB Mann Judd



HENRY DAVIS YORK



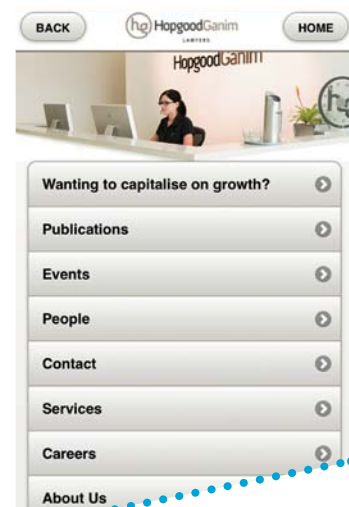
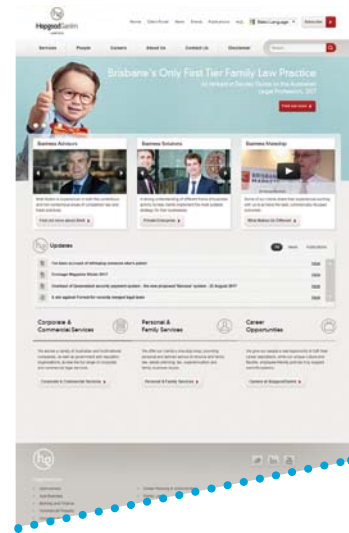
SPEED WEIGHT



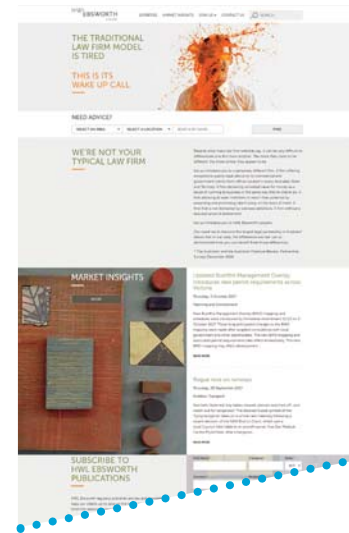
WEIGHT



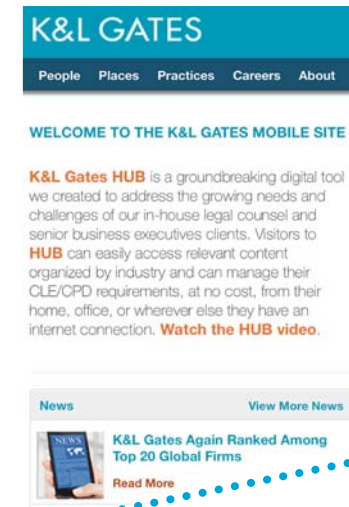
HopgoodGanim



HWL Ebsworth



K&L Gates



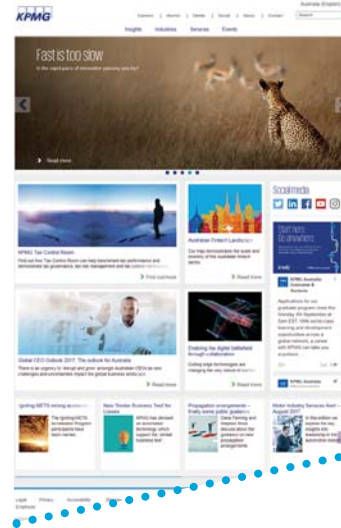
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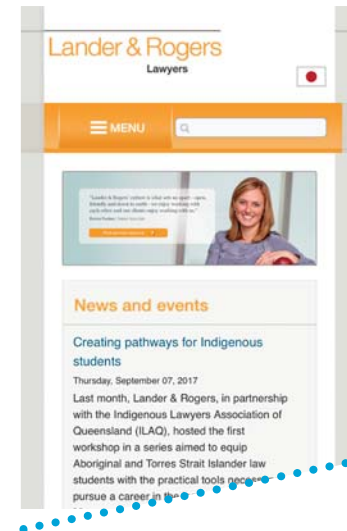
King & Wood Mallesons



KPMG



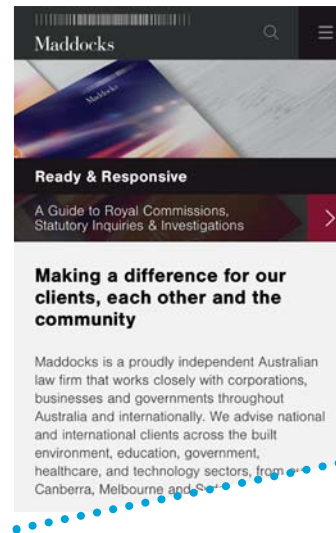
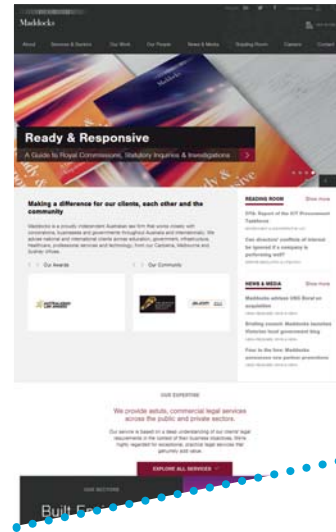
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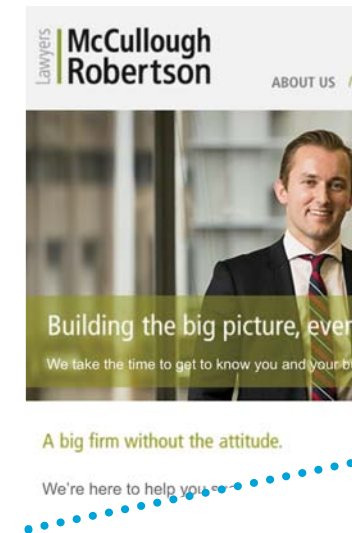
Macpherson Kelley



Maddocks



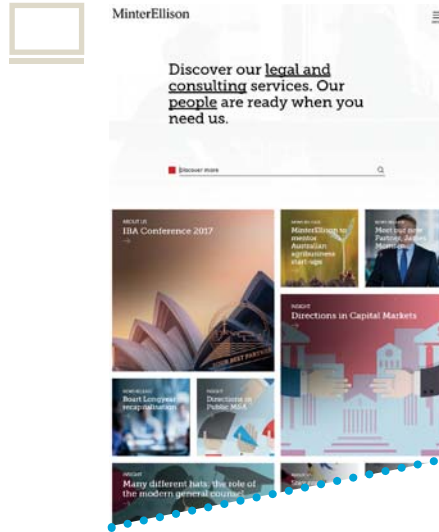
McCullough Robertson



WEIGHT



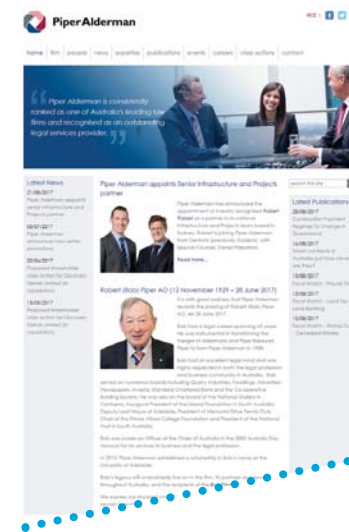
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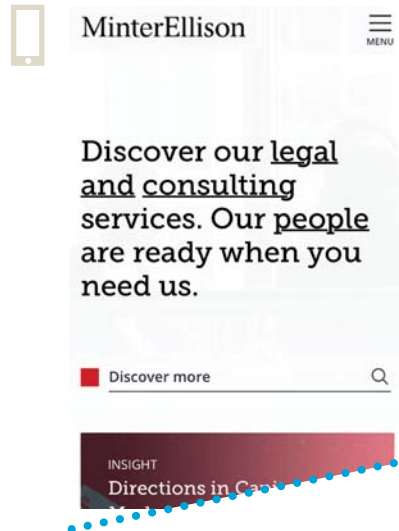
Norton Rose Fulbright



Piper Alderman



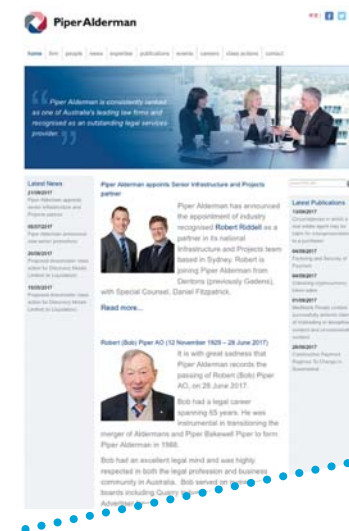
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Norton Rose Fulbright



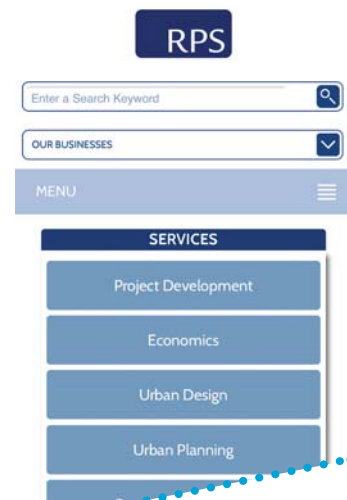
Piper Alderman



CHINA

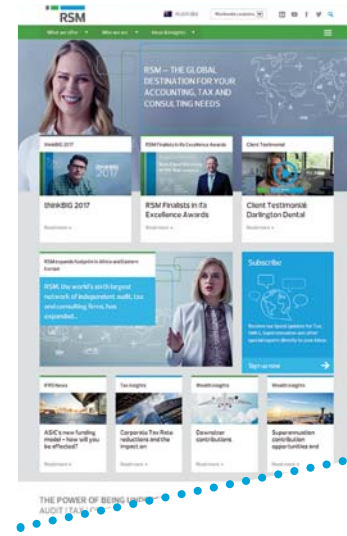


RPS



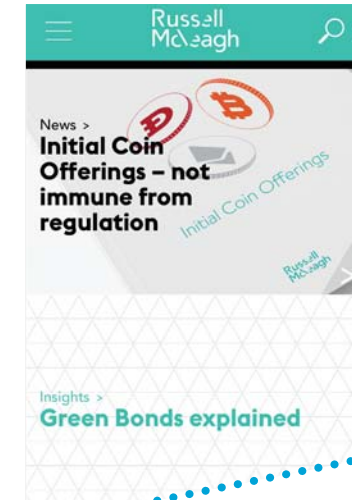
CHINA
★

RSM



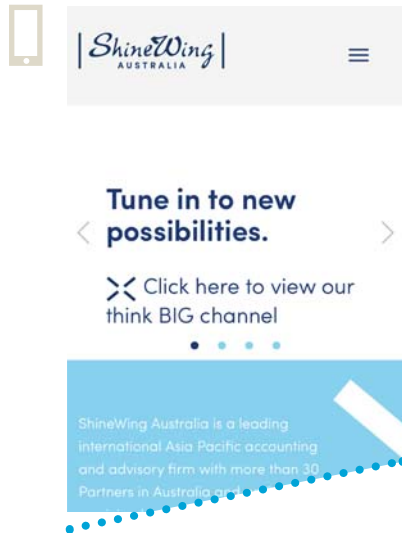
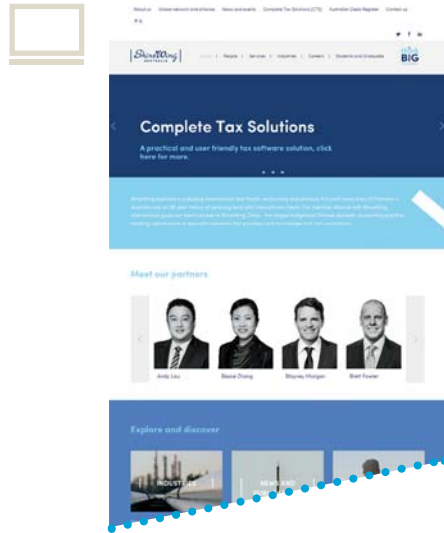
SPEED
⚡

Russell McVeagh

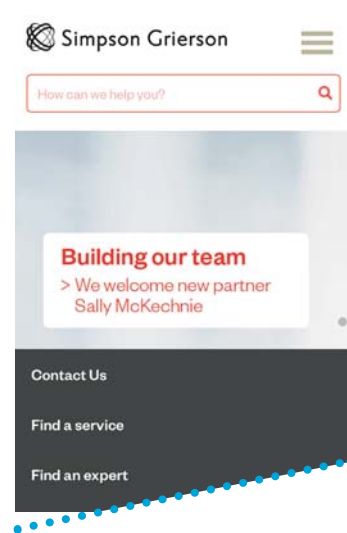
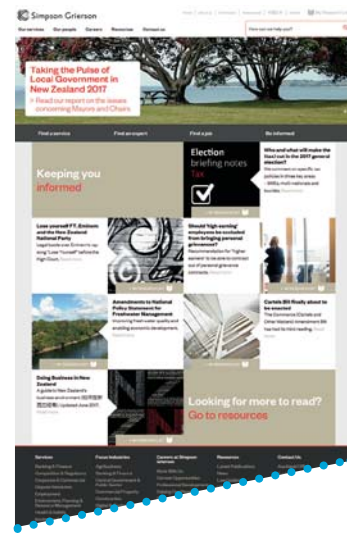


WEIGHT
🎈

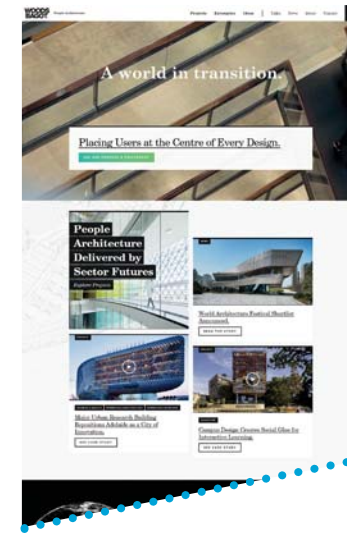
ShineWing Australia



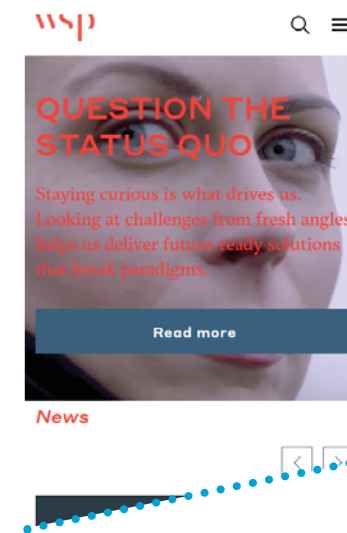
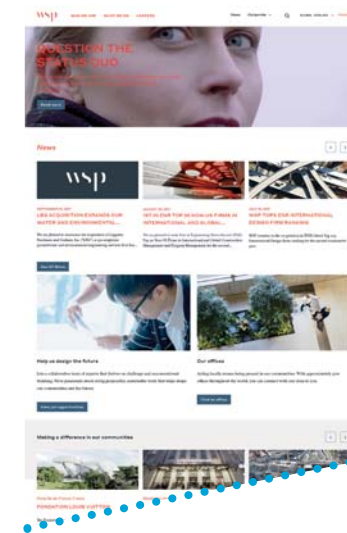
Simpson Grierson



Woods Bagot



WSP Global

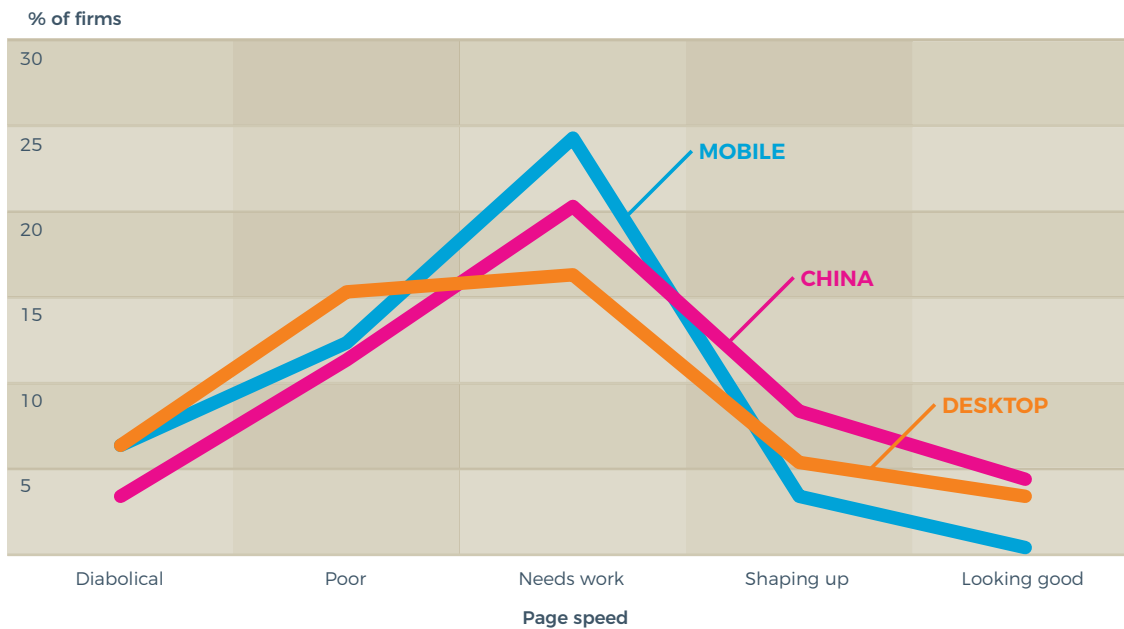




75% OF SITES
ARE SLOWER IN
SHANGHAI THAN
SYDNEY...



**ANALYSIS
& WRAP-UP**



Driving in the middle lane

This comparison overlays page speed results for desktop, mobile and the site's speed in China. It indicates what percentage of firms performed poorly and what percentage performed well by each measure.

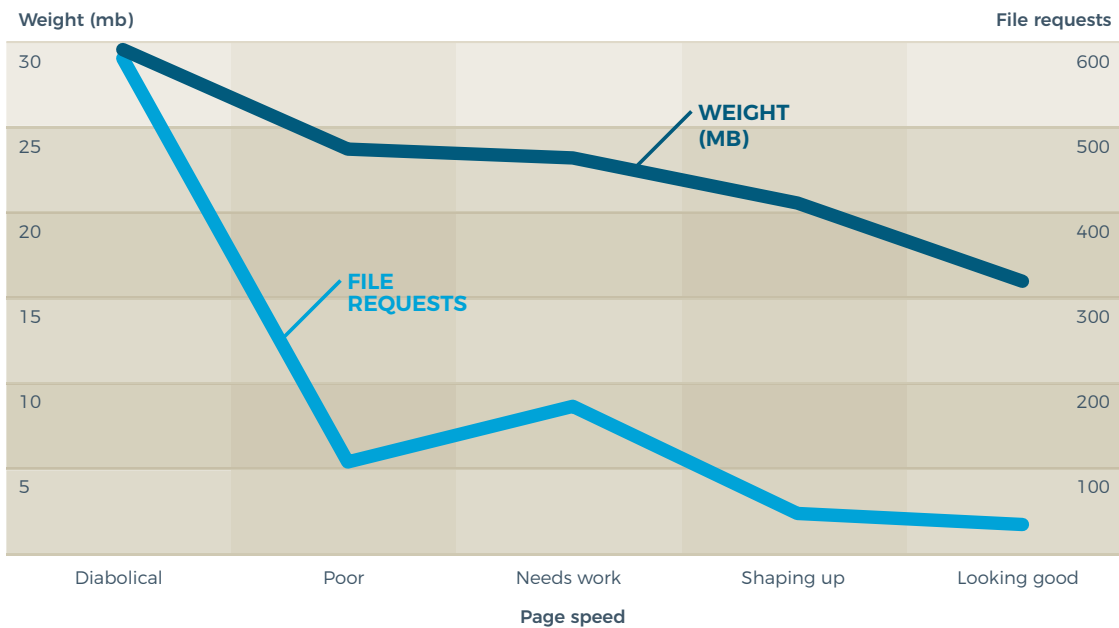
It highlights that most firms are in the 'middle-lane' and that there is room for improvement.

Scores using Google's page insights measures for mobile and desktop performance ranged from 10 (diabolical) to 85 (looking good) with an average score of 51 (needs work).

Overall most mobile sites under-performed their desktop counterparts but at a similar level.

Most sites were slower in China than in Sydney. There were exceptions though with five high performing sites delivering an even faster experience in China.

Firm-by-firm comparison highlighted that the big firms are often outrun by mid-tier and smaller organisations.



Rich and fast-moving?

This chart compares the average number of file requests and the amount of data downloaded against the site's speed. While the number of file requests reduces significantly for the faster websites, interestingly the average page weight can still be quite heavy.

On closer inspection these high performing sites are also often visually rich with high quality graphics and video backgrounds.

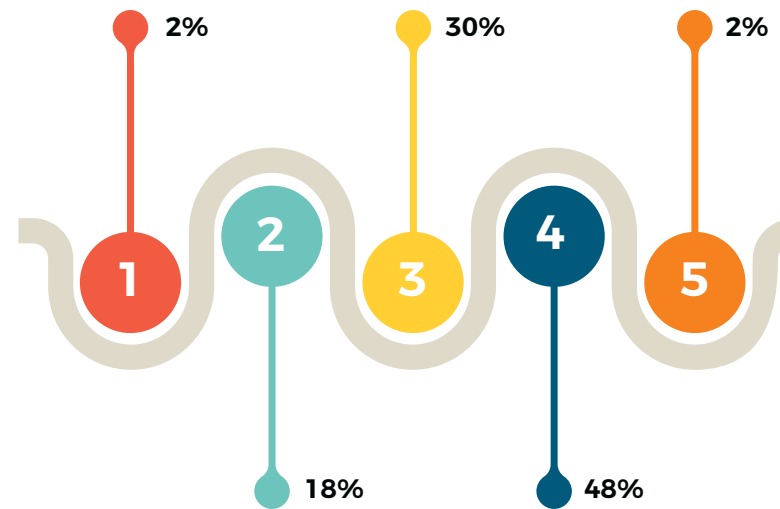
And again, some smaller organisations compare well to their larger counterparts indicating that implementation quality and ongoing management is not something limited to larger teams and budgets.

Each firm should aim to have a faster website, the smallest number of requests for the page load and make sure that any weight loaded is 'lean muscle mass' that is well optimised media and files that only load as required.

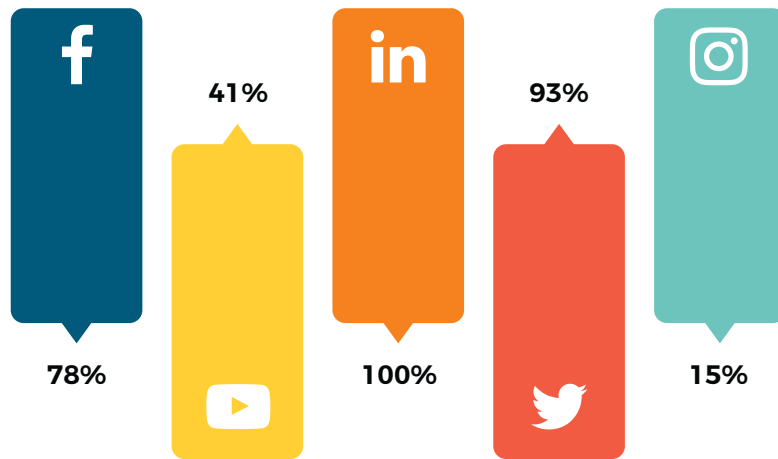
How social are we?

All firms are using at least one social media channel with 100% of firms having a LinkedIn presence. 50% of firms are using four or more channels.

While the number of social media channels in use did not necessarily correlate with the organisation's success in any one channel, all the top performers were active in four channels.



of channels and % of firms



% of firms present on each channel

And where do we 'go'?

After LinkedIn, Twitter and then Facebook rank highly for usage.

Video can of course be hosted locally or on other platforms, but perhaps the degree of YouTube adoption is an indicator of the level of video use across professional services and B2B markets.

Instagram is still emerging and perhaps there an opportunity for early adopters.

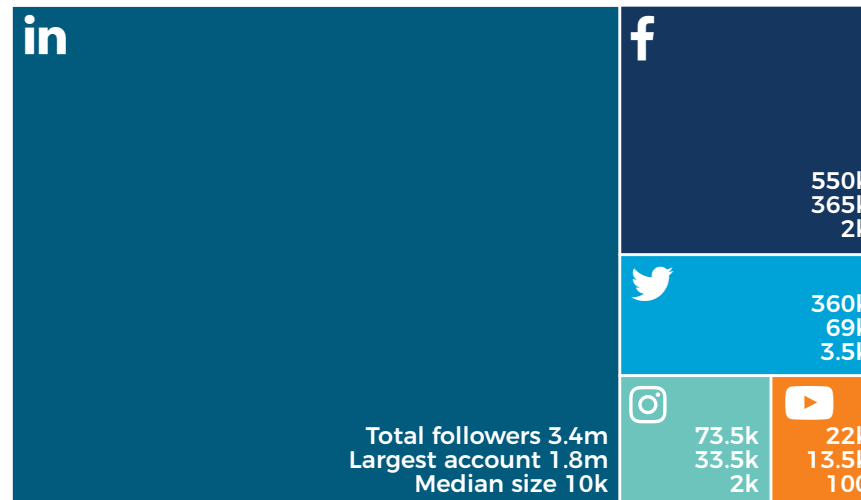
Followers

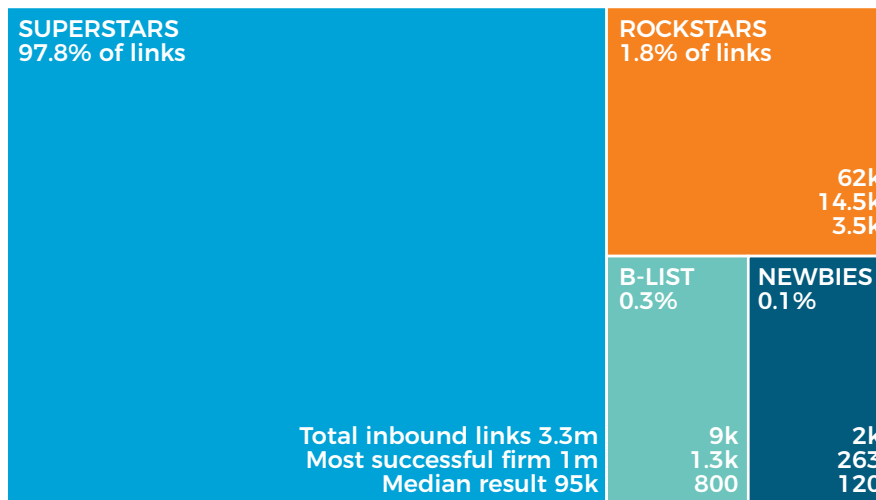
The largest firms dominate the social media scene with the highest number of followers. To some extent this is due to a number of global organisations having (or consolidating) their messaging into a single account per channel.

As an industry, LinkedIn dominates with the largest number of followers and median number of followers per firm.

Twitter is next with a smaller following but a larger median number of followers per firm.

Interestingly the median number of followers for firms with Instagram accounts equals that of Facebook.





Inbound links

The largest firms dominate with 97.8% of all inbound links.


This is in part due again to their consolidation to a single domain. This means that globally all links are assisting with increasing their domain's authority as a content source to search engines.

However, B-listers and rockstars should continue to persist, as the link quality and the relevance to the local market is often higher.


Newbies likely have limited content or content promotion activity or perhaps have changed domains without implementing an SEO friendly redirect strategy.



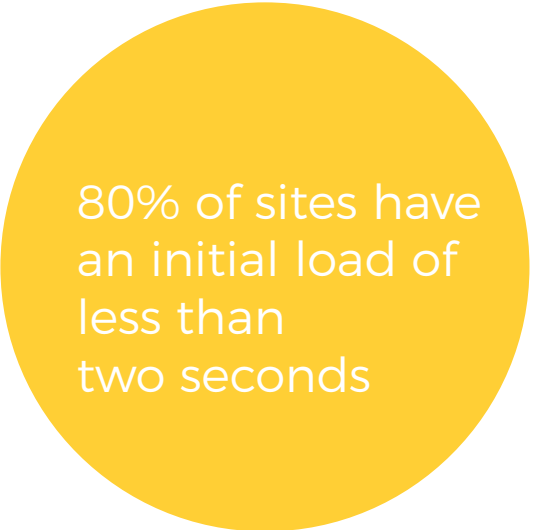
15% of firms are on Instagram while 100% are on LinkedIn



On LinkedIn and Twitter, the leader is well ahead of the crowd



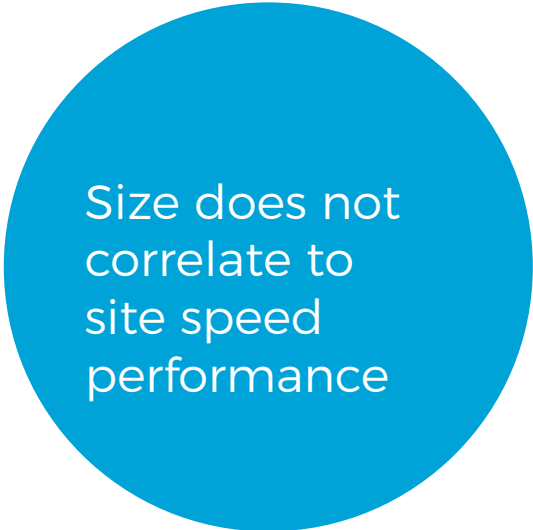
Four firms have sites that run faster in Shanghai than Sydney



80% of sites have an initial load of less than two seconds



72% of sites are secured with SSL which is good for SEO



Size does not correlate to site speed performance

**Above all, are your
digital efforts
generating leads
and helping to
grow margins?**

Can we go faster?

Web performance feels good, creates a stand-out experience and is a must-have to appear digitally savvy. We work hard to develop business development strategies. We sweat over thought leadership, invest in both online and offline advertising and the PR machine. It is clear that we're investing significant time and money in creating and maintaining sites and social media accounts.

So when someone hits our site it should be a fast and enjoyable experience. In this regard, we can do better.

These findings show that the top end of town is dominating with social media followers and links back to their content, but this is due in part to domain and social media account consolidation. However, there are likely opportunities for more rockstars focused on specialist topics and niches to compete.

With site performance it is clear that size doesn't matter and that the smallest of firms can compete with the largest. Everyone has room to improve. We should each set KPIs and look for opportunities for short and long-term improvements.

As a collective we should strive to perform as well as top bank, stock broker, airline and social media sites. This will help to increase on site conversion and add weight to our advice when it skirts across or directly addresses the digital space. Afterall, we live in a digital age and digital is changing the way we do business.



ICON's 2000+ members are from sectors as diverse as accounting, legal, engineering, property and architecture, technology, management. Our reach spans across the Asia-Pacific, including Australia, New Zealand, Singapore, Shanghai and Hong Kong.

We are a collective network of B2B professionals working as marketers, sales leaders, business developers, customer engagement specialists and communicators, acting as an active knowledge, development and social network, which connects industry giants with newcomers in order to develop relationships and share best practice.

Our purpose is to support members to be inspired to innovate and deliver best practice, and to network and collaborate so that they can make a positive impact on their business and their career.

www.iconapac.com



From a desire to grow, a strong core idea or a challenging situation, we work with our clients to define, develop and sustain brilliant digital experiences that engage their audiences.

Having worked with professional services and financial services organisations in over 30 countries, we understand the mechanics of partnerships, enabling user advocacy, the nature of services and different selling life cycles. As specialists in digital, we know how to connect the elements in those complex environments and link it through to a digital strategy that supports organisational, business and marketing goals online.

In an age where everything is digital, we don't just do digital: We help transform how the world sees, meets, greets and connects with you.

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