



Keynote 2008 Trends & Observations of the Mobile and Connected World

Introduction

Wall Street sent shock waves across the country and around the world in 2008, leaving no industry untouched. And, as always, technology is being looked to as a critical resource for aiding economic recovery, from Wall Street to Main Street. This year, technology charted new territory and brought about many exciting new advancements. The Olympic Games were a triumph for China, as well as for streaming video around the world. The United States presidential campaign especially was a technological tour de force for the internet and in particular showcased the continuing momentum and power of SMS text messaging. The advent of Chrome and Android from Google will impact mobile and Web development for many years to come.

The internet and mobile devices play a continually increasing role in society and have become the central media of everyday life. In 2008, the evolution of the conventional and mobile Web continued to significantly impact consumer behavior and business across every industry.

In August of 2008 alone, more than 6.5 million Americans accessed online video through their mobile phones. Although that peak is easily attributed to the Olympic Games, it is also an indicator of multi-tasking consumers who no longer have time or desire for appointment television. The Web has become an essential part of the everyday consumer's life, on a scale unimaginable just a decade ago.

The Keynote 2008 Trends & Observations of the Mobile and Connected World Report provides an overview of the key issues that shaped the "connected" world. The report examines how technologies, from the Web to the mobile phone are specifically impacting key vertical industries, from financial services to politics.

This report, prepared by Keynote Competitive Research, the industry analysis group of Keynote Systems, includes highlights from the dozens of competitive research studies conducted by Keynote over the course of 2008, as well as the expertise and opinions of Keynote's research consultants.

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1. Keynote Competitive Research Overview

The Keynote Trends & Observations of the Mobile and Connected World Report draws upon key findings from [Keynote Competitive Research studies](#) that measure customer experience and service levels across a wide range of Web sites, mobile sites and devices. Overall, the company examined the results from interactions by more than 50,000 online consumers with 200+ leading Web sites in 2008. In addition, the data published in the studies were collected from Keynote's 2,600 measurement computers and mobile devices in more than 240 locations around the globe, which test the technical quality (reliability and responsiveness) of hundreds of Web sites.

Keynote Competitive Research studies have examined the leading companies in the following industries:

Financial Services: banking, credit card, brokerage, auto insurance, and mortgage.

Media / Entertainment Portals: advertising micro-sites and online search

Mobile: Common Short Code and iPhone Web site usability

Retail: consumer electronics, and books, music, movies and games

Technology: computer hardware

Travel: airline, cruise, lodging, and rental cars

Voice: Voice over IP service providers

2. Top Mobile Trends in 2008

According to CTIA, consumers with mobile phones and devices in the US now exceed 268 million and that number promises to grow. The now ubiquitous device has completed the transition from business tool to consumer must-have and has become well entrenched in our daily lives. The mobile services industry is expected to [surpass \\$200 Billion in data revenue in 2008](#). With recent industry consolidations and a worsening global economy, the competition has become more intense.

In 2008, Keynote's on-demand mobile testing and measurement network grew to cover more than 270 operators in over 80 countries. With more than 2,500 measurement computers and mobile devices deployed throughout the world, thousands of data points were collected on mobile companies, mobile devices and mobile Web sites. Based on the experiences of 2008, Keynote experts identified a series of trends in the Mobile market that had, and will continue to have, broad impact on consumers and the companies that serve them.

2.1 Common Short Code Monitoring

In 2008 SMS overtook voice as the most used communication vehicle. Once dismissed as a "fun" diversion of the young, texting is now serious business. Because of their simplicity and unique ability to reach millions of users instantaneously, Common Short Codes (CSCs) are quickly being embraced as a new marketing channel. Here's an interesting data point: American Idol received more than 40 million short code messages per week in 2007. This year the Obama campaign attracted serious attention when they integrated SMS into their outreach program. The usefulness of CSCs goes well beyond

entertainment and politics; businesses are adopting them for couponing, advertising, branding, and even financial transactions.

Starting a CSC program is relatively easy, however, the value chain is rather complex. Implementing a CSC campaign involves multiple players – wireless service providers, aggregators, content providers, and application providers. Poor execution by any of the key players can result in lost revenue, a poor brand experience, and exposure to the threat of litigation.

Real-time monitoring for SLA agreements and visibility into real-time performance across the delivery chain is crucial to ensuring that the campaign is meeting availability and performance goals. It provides insight into every player's performance, and, when there is a problem, makes it possible to identify the actual points of failure. Use of an independent monitoring solution is the best strategy to allow marketers to choose the right partners and ensure the results are within acceptable parameters.

In 2008, Keynote leveraged our leadership position in monitoring solutions to look at the challenges of short code implementation along with strategies for improvement. Keynote Competitive Research, the industry analysis group of Keynote Systems, published the [industry's first study](#) on the performance, availability and success rates of SMS messages addressed to CSCs. This study demonstrated that SMS can fail at alarming rates and requires constant attention to ensure they live up to their potential.

2.2 Integration over Three Screens

November 4, 2008, ended the most exciting and technologically advanced presidential campaign ever witnessed in the United States. The integration of traditional media, the internet, and the mobile Web was unprecedented, and quite costly. The top media investment was by the Obama campaign, which purchased 30-minute infomercials across several major TV networks. However, the fundraising occurred primarily online, and virally at that. Both candidates had their own Web sites which featured number one in Google and Yahoo! for their respective names. It is worth noting that both Web sites incorporated Javascript for advanced Web 2.0 features.

John McCain's Web site amassed an amazing 730,243 inbound links, which would be an SEO dream in any other market. However, over the same period, Barack Obama's site gained 1,604,953 links. Both Web sites had great potential to further engage with users and capitalize on community functionality such as RSS feeds, widgets, mobile text messaging, and user generated content. The failure of Obama's vice presidential notification via SMS was only widely publicized due to its popularity. Conversely, McCain had coverage of his political rallies removed from YouTube as he became another victim of the increasingly stringent copyright laws. As a result he only had 206K associated videos compared to Obama's 368K. The opportunity to reach today's multi-tasking consumer will continue to emphasize the importance of consistency and performance across the screens of traditional media, the internet and the mobile Web.

2.3 Mobile Goes Main Street

There is no question that mobile is now mainstream. For years we'd heard that the mobile era was "just around the corner"; some mysterious game-changing killer app was going to revolutionize everything. The fact is that the killer apps, SMS and the mobile Web, were already here.

In 2008, it became clear that we live in a truly mobile society, and there is sufficient reason to believe that the current mobile momentum is unstoppable. There was no “one big thing” that would change our lives. Instead, we changed our collective lives to allow SMS and the mobile Web to be part of them. SMS overtook voice; the Obama campaign integrated SMS into its outreach program. Keynote [monitored the Obama campaign's SMS program and derived key lessons](#) for those embracing this hot technology.

Companies whose bread and butter are their Web sites are now seeing a small but significant amount of traffic coming from the mobile Web. Sooner or later, it will be evident to all that to realize and maintain industry leadership, it is imperative to optimize the mobile user's customer experience. [In an interview with Keynote's Benchmark magazine](#), John Peebles, VP of Online Marketing for Avis Budget Group, discussed mobile as part of his industry's [future](#) and what they're doing about it.

In markets such as retail, finance, travel, social media, and information, companies are using mobile as part of their integrated strategies for finding and serving customers. As it becomes obvious that users are wedded to mobile devices in their daily living, an effective mobile strategy is a requirement, not an option. Increasingly, end users are more likely to forget their wallet when leaving home than they are their mobile phone.

2.4 Battleground of the Future

The mobile Web has moved beyond gimmickry and has taken its place as an extension of the internet experience. Users increasingly expect that mobile access will act just like desktop access. However, there are many factors in play with mobile navigation, and content providers cannot expect that mastery of one screen will result in domination of the next. An important lesson of the internet is that a competitor is merely a click away. There are low barriers for a user to switch to a mobile Web site that better meets his/her needs.

Perhaps nothing can better demonstrate the challenges of mobile Web providers than the results of Keynote's first-in-the-industry [mobile Web usability study](#) for the iPhone. The [study](#) found that a Web site that was perceived to be superior on the desktop could receive an inferior rating on a mobile device. Adapting Web content for a phone presents a host of technical obstacles that development teams must overcome. Speed, availability, and good site design are all critical to delivering a good customer experience. Quantifiable data can now be collected for all three to support mobile content providers looking to gain the upper hand.

The Keynote study compared the experience and satisfaction of consumers performing tasks on the Fox and Yahoo! News mobile portals using the iPhone. Satisfaction rates were low for both Yahoo! (51%) and Fox News (64%) mobile sites, and less than half of users found the mobile home pages to be appealing. Users of both sites wanted more information and Yahoo! users were frustrated with visual appeal and too much scrolling. Fox News users also mentioned frustrations with layout, site speed and search. Fox News users were more likely to find the mobile experience to be somewhat better than a computer experience, but they did not like the amount of scrolling required to navigate the site. Yahoo! users were more likely to find the mobile experience to be much worse than a computer experience. Their largest complaints were slow download times and site layout.

The study highlights three key points for content providers. First, one cannot assume that perceptions on the internet will carry over to into mobile; what may appear good on a 22" monitor is not ideal for the 2" LCD. Second, speed, reliability and usability are even more important on mobile as customers have performance expectations carried over from the desktop even if they do not use them in the same way. Third, as more people access the web via a mobile device, those differences between mobile and internet experiences must be recognized and accounted for to maintain the most positive end-user experience.

Clearly, the winners of the mobile world have yet to be determined. Optimizing content for a mobile device is paramount for companies looking for best-in-class recognition. The importance of performance testing and measuring for achieving that goal cannot be understated. Yet, in a November survey of 186 mobile content professionals conducted by Keynote, 38% said that they do not test their mobile site and another 11% did not know whether or not their companies tested. Of the remaining, 38% rely on a do-it-yourself approach. It is reasonable to expect that a shift in thinking on the importance of test and measurement will take place as more traffic hits the mobile Web and the stakes continue to rise.

3. It's a Bear out There: Trends for Financial Services in the Connected World

The sub-prime mortgage crisis and credit upheaval did not cause widespread mistrust in the commercial banking industry. In fact, consumers reacted more favorably to banking than to most other categories of business. The implosion of investment banking firms and the resultant federal assistance programs all but dissolved consumer confidence and sent shock waves across the country, and around the globe. Keynote Competitive Research has fielded studies both before and after the Wall Street crisis, and the emerging trends include:

3.1 Consolidation

Millions of online consumers and businesses will have to adjust to a new online experience as their banks are absorbed into another bank. National City, Wachovia and Washington Mutual were each among the 15 largest retail banks. Each had millions of consumers and businesses using online banking and other online account management offerings weekly or even daily. Acquiring banks, such as JP Morgan Chase, PNC and Wells Fargo, face a choice that will affect millions of newly acquired customers, their existing customers, or both: what to do with the online banking offering of the acquired bank. Does the acquirer convert the acquired customers over to its current online banking offering, does it adopt the online banking offering of the acquired bank, or does it build a new system altogether? The merger of JP Morgan Chase and Bank One gave users a brand new system when the bank abandoned both previous systems. When Fleet acquired the much smaller Bank of Boston, existing users were migrated to the superior Bank of Boston system – and liked the result.

Usually, however, the acquiring bank converts acquired customers over to its preferred system within about one year of closing the acquisition. Therefore, the number of consumers and small businesses that will experience a drastic

change during 2009 in how they manage their money online will number in the tens of millions.

As IT focuses on cost reduction and efficiencies for online banking systems, the “winning” systems are trending towards high functionality, which drives user interaction. Acquisitions only accelerate the trend towards greater online functionality, as online banking functionality of the acquiring and acquired banks is integrated into a single solution.

3.2 Community

Web 2.0 is both a threat and an opportunity for online banking. This two-edged sword is driving most of the R&D at financial institutions. Second Life came and went for the financial sector; however, live chat has migrated from an exception to an expectation in online sales and is now entering online banking customer service. Consumers have become familiar with online financial services; they are learning more and asking more questions. Applications must be flexible, scalable and deliver real-time connectivity to answers across multiple platforms and devices. The online advisor was the original two-way banking tool, which has opened the door to community tools such as Wesabe.com and Mint.com, where users are connecting their online banking to other tools.

3.3 Banking Focus

Online banking originated with credit card offers, moved to savings accounts, and, last year, finally allowed users to set up a checking account – without ever visiting a branch. Growing revenue and new customer acquisition were primary focuses for online banking systems. Presently, there is an emphasis on customer retention and the features that enable actual banking will take precedence. Privacy measures are evaluated for usability, as well as functionality, as the more onerous security measures have been found to lead to poor habits or even disuse. Mobile banking is gaining acceptance as the features have moved from a thick client, to WAP, to SMS. Bank of America, Chase and others offer authentication systems that send an SMS text message with access codes to your phone number of record as an added measure of security, as well as usability.

4. Best of the Financial Web in 2008

Keynote Competitive Research produces leading-edge competitive industry research that leverages our [global test and measurement network](#) and the [Keynote Research Panel](#). Keynote Competitive Research regularly evaluates the current state of online customer experience, service levels (responsiveness and reliability) and implementation of the best practices for leading Web sites across a variety of financial services industries, including banking, credit card, brokerage and auto insurance. Keynote identifies leaders in two ways: Scorecards for Financial Services and Financial Services Industry Studies.

Keynote Scorecards for Financial Services

Keynote's [Scorecards for Financial Services](#) are bi-annual industry-specific examinations that use a framework of 200+ expert-determined criteria to measure sites' ability to meet best practice guidelines. Criteria are grouped into industry-specific “user tasks” (e.g., apply for an account, transact, or

learn and plan) and “categories” (functionality, usability, privacy and security, and quality and availability) in order to help firms identify the strengths and/or opportunities in specific areas of their sites.

Many financial service organizations found out this year that more content on a page will make it slower. The more recent Web enrichment is done hand-in-hand with improving the way that pages are displayed, including sensitivity to best practices for performance in order to deliver a richer page that is even faster than the previous, simpler version.

The increased implementation of Web 2.0 technologies is no longer a competitive differentiation. A Web site cannot simply include rich interactive features, but must also implement them well from a performance standpoint. Technical performance issues are evaluated alongside, and sometimes prioritized ahead of, enhancing aesthetics or adding more features.

AJAX and Web 2.0 do amazing things in the browser. But it is possible to push the browser to its limits, in which case, the new Web applications may create a really negative user experience and drive users away. Balancing features, usability and performance is a tricky task, and this year, the Scorecard leaders exhibited great balance between all three.

Keynote Industry Studies - Brokerage

Keynote Competitive Research Brokerage Scorecards		
Rank	Full Service Brokerage	Self Directed Brokerage
1	Smith Barney	Fidelity Investments
2	Wells Fargo Investments	E*Trade
3	UBS	Charles Schwab

In addition to brokerage services, Keynote completes scorecards for banks, credit cards, insurance carriers and mortgage providers.

Keynote Industry Studies - Financial Services

[Keynote Industry Studies for the Financial Services Industry](#) reveal which financial services companies are successfully using their Web sites to build brand affinity and what they are doing right in order to drive future business. The industry studies comprised two distinct segments: customer experience and service levels.

The Keynote [Customer Experience Rankings](#) examine the online experience of more than 2,000 customers or prospects as they interact with the both the public and secure online banking areas of leading sites. The study details how each site performs versus competitors across key business objectives, including customer acquisition, using a rigorous statistical driver analysis that details what comprises success in each of these areas. The studies offer specific actionable steps the institution can take to improve online business performance, with a particular focus on improving customer satisfaction, brand affinity and customer acquisition.

The [Service Level Rankings](#) examine the technical performance of leading financial services sites including load handling, site responsiveness and reliability. The study uses Keynote’s Transaction Perspective product to

mimic the actions of consumers and collect more than 6,500 data points detailing the online technical performance of each site included in the study.

2008 Banking and Auto Insurance Industry Study Rankings

Keynote Competitive Research US Banking Leaders – 2008 Customer Web Sites			
Rank	Overall Customer Experience Ranking	Reliability Service Level Ranking	Responsiveness Service Level Ranking
1	Bank of America	Chase	Washington Mutual
2	Wachovia	Bank of America	Wells Fargo
3	Chase	Wells Fargo	Bank of America

Both Wachovia and Washington Mutual have invested heavily in understanding user preferences, and streamlining their online banking systems, with a specific interest in attracting new customers. The new systems arising from the mergers / buyouts will change the online banking experience for millions.

Keynote Competitive Research US Banking Leaders – 2008 Prospect Web Sites			
Rank	Overall Customer Experience Ranking	Reliability Service Level Ranking	Responsiveness Service Level Ranking
1	Wachovia	Wells Fargo	Washington Mutual
2	Washington Mutual	Bank of America	US Bank
3	National City	Wachovia	Wachovia

Keynote Competitive Research US Auto Insurance Leaders - 2008			
Rank	Overall Customer Experience Ranking	Reliability Service Level Ranking	Responsiveness Service Level Ranking
1	Progressive	Esurance	AIG
2	GEICO	Progressive	Progressive
3	Allstate	American Family	American Family

Progressive Insurance has led the way in understanding their online customers. Their sites are designed for performance as well as aesthetics.

5. Best of Media and Entertainment Portals in 2008

Advertising Micro-sites

Internet advertising is the fastest growing category of the \$300 billion advertising market. However, 69% of consumers favor ad blocking products. Therefore, advertisers are creating the next generation of advertising through rich, interactive promotional micro-sites that go beyond the traditional banner ad to engage, entice and excite visitors. These micro-sites are growing increasingly popular as a way to offer more and better information than a standard advertisement, and offer the ability to “connect” with end users. They are similar to TV ads in that they offer high production

values and incorporate pop culture. However, unlike TV ads, they are highly interactive.

Keynote's study of automobile micro-sites tracked 175 internet consumers who were interested in purchasing a car within the next six months. Each of the 175 participants, working in their own natural environment, performed tasks and answered questions regarding their experiences interacting with each of three micro-sites: the Chevy Avalanche, the Volvo C30 and the Toyota Yaris. The micro-site study captured behavioral data to understand how visitors interacted with each micro-site and captured data regarding the number of interactions, number of hovers, length of time exploring, what visitors clicked, what areas of the site were explored, and what frustrations or difficulties were experienced.

The study found that the Chevy Avalanche micro-site provided the site experience enjoyed most by study participants (41%), followed by the Volvo C30 (32%) and Toyota Yaris (23%). As micro-sites grow in complexity, simply reviewing a site and asking before and after questions will not give developers or marketers the data they need. User perceptions change within the experience, and the end result will be different depending on the elements selected for interaction. Measurement during the experience will grow increasingly more important as the sites become deeper and more feature-rich. Historically, the consumer was a passive and often unwilling participant in traditional advertising. However, with Web 2.0-based rich interactive advertising, the consumer must be presented with compelling content to draw him or her into the site. The consumer must be engaged.

Best of Search

Keynote provides a report on search portals twice each year. It includes customer experience as well as service-level metrics. Although the customer experience rankings resemble expected results, the service levels offer some surprises. For example, Ask.com ranked second in reliability, demonstrating the benefits of their infrastructure planning.

Rank	Overall Customer Experience Ranking	Reliability Service Level Ranking	Responsiveness Service Level Ranking
1	Google	Google	Google
2	Yahoo!	Ask	Yahoo!
3	MSN	MSN	MSN

6. Best of Technology in 2008

Computer Hardware Web Sites

Keynote's task-based approach to researching user behavior is particularly well suited to understanding the complex ways that users look for information about computers online. The tasks undertaken by panelists for this study included:

1. Home Page

"Without clicking anywhere (except to scroll) spend a few minutes looking at COMPANY's home page. When you have formed an impression of the site and what it offers, please click 'Answer'."

2. Find a Computer

"Now, suppose you would like to buy a personal computer and you're not sure which computer system best suits your needs. Spend some time on SITE researching different personal computer systems that would best meet your needs in terms of price, features, and any other criteria that are important to you."

3. Search for Peripheral

"You are interested in buying an accessory or peripheral device (e.g., printer, scanner, etc.) of your choice to go with the personal computer you just researched. Use SITE's search feature to find a peripheral that you might really choose if you wanted to purchase one in real life."

4. Purchase Process

"Proceed as far as possible through the process of purchasing the personal computer you selected earlier in the evaluation or any other computer of your choice without actually entering your credit card information, other sensitive personal information (i.e., SSN, DOB), or completing the purchase. If you would like to customize the personal computer or need anything else for your computer (e.g., accessories, etc.) and can find them at this site, you may customize or add them as well. Click 'Answer' when you have reached the point where your credit card information is required. [Note: Do NOT enter any credit card information, or your credit card will really be charged.]"

5. Customer Support

"Please use SITE to find the answer to the question or problem you just selected. If you cannot find the answer on the site, explore the options available for contacting customer service for help with your question."

To gather data on the operational quality of sites in a study, Keynote uses automated testing agents to perform scripted tasks. The agents are deployed throughout Keynote's Global Network and perform these tasks at least hourly for a 30 day period. The agents track more than 35 performance metrics and collect over 6500 data points to rank the sites in the study on each of seven key performance factors. Newegg.com significantly raises the bar for reliability with a uptime of 99.8% during the study period.

Keynote Competitive Research Computer Hardware Leaders - 2008			
Rank	Overall Customer Experience Ranking	Reliability Service Level Ranking	Responsiveness Service Level Ranking
1	Best Buy	Newegg.com	HP
2	Tigerdirect.com	Tigerdirect.com	Wal Mart
3	Amazon.com	Circuit City	Newegg.com

7. The Best of Online Travel in 2008

Web Veterans Need to Be Vigilant

Travel has seen some significant changes as the online marketplace has matured. While the online travel agency (OTA) sites are the kings of convenience, many consumers are starting to make their final reservations on supplier sites. Suppliers have invested heavily in their loyalty programs and are making those specialty features available online. As suppliers are gaining online experience, their sites are incorporating increasingly complex and engaging features. Web 2.0 tools have enabled individual suppliers to provide a richer end-user experience, which had been, at one time, the exclusive domain of the OTAs. However, while the segment is investing heavily in researching the most robust and engaging features, there are challenges in the back room. High error and outage rates, major load handling issues and the poorest and most variable overall performance plague the travel segment more than any other vertical that Keynote examines.

Keynote [Industry Studies for the Travel Industry](#) uncover which suppliers and online travel agency sites generate the strongest positive brand perceptions and greatest likelihood to acquire a user. Keynote also examines which aspects of the online experience are most predictive of customer conversion. A key aspect is uncovering which site designs have had the biggest impact on user perceptions and what opportunities exist for the online travel industry to improve a user's experience on their different properties.

Price is Important, but Don't Forget Support

Critical insights of the study are derived from understanding why sites rank as they do. Keynote conducted a sophisticated driver analysis to determine which aspects of the site experience had the most significant impact on site success. The factors that have the greatest relationship to these site's effectiveness indices reveal which areas of the site experience should get the most attention in order to improve critical site outcomes. Keynote competitively benchmarks sites across these drivers – and determines the key factors that contribute to success in these areas. It is interesting to note that "Help & Support" and "Price Satisfaction" as drivers vary in importance from travel market to travel market.

Keynote Competitive Research - Top Impact Drivers Affecting Online Conversion Travel 2008				
Rank	Airlines	Cruise	Lodging	Rental Car
1	Price Satisfaction	Design & Organization	Help & Support	Help & Support
2	Design & Organization	Ease of Booking	Trust & Security	Price Satisfaction
3	Help & Support	Activity Research	Ease of Booking	Quality & Reputation
4	Ease of Booking	Help & Support	Price Satisfaction	Ease of Booking
5	Availability	Flight & Lodging Research	Design & Organization	Finding a Rental Car

2008 Industry Study Rankings

The online travel agencies, led by Expedia, Orbitz and Travelocity, have years of experience on the Web. They continue to lead the indices in conversion, however there are some surprising new online players making major inroads.

Keynote Competitive Research Airline Web site Leaders - 2008			
Rank	Overall Customer Experience Ranking	Reliability Service Level Ranking	Responsiveness Service Level Ranking
1	Expedia	Southwest	Jet Blue
2	Southwest	Jet Blue	American
3	Travelocity	Continental	Southwest

Keynote Competitive Research Cruise Web site Leaders - 2008			
Rank	Overall Customer Experience Ranking	Reliability Service Level Ranking	Responsiveness Service Level Ranking
1	Expedia	Holland America	Holland America
2	Travelocity	Orbitz	Travelocity
3	Royal Caribbean	Royal Caribbean	Carnival

Keynote Competitive Research Lodging Web site Leaders - 2008			
Rank	Overall Customer Experience Ranking	Reliability Service Level Ranking	Responsiveness Service Level Ranking
1	Marriott	Priceline	Marriott
2	Expedia	Marriott	Travelocity
3	Hotels.com	Expedia	Hilton

Lodging suppliers are making the most substantial inroads, with Marriott leading the way by placing first overall and in brand impact, while coming in second to Expedia in conversion impact. The Marriott site is a favorite of users who find the features helpful and well organized.

Keynote Competitive Research Rental Car Web site Leaders - 2008			
Rank	Overall Customer Experience Ranking	Reliability Service Level Ranking	Responsiveness Service Level Ranking
1	Travelocity	Expedia	Alamo
2	Budget	Alamo	Enterprise
3	Expedia	Orbitz	Thrifty

8. Best of Online Retail in 2008

Retail Web Optimism

Keynote [Industry Studies for Retail](#) are specifically targeted to uncover which Web sites are motivating and enabling consumers to purchase products and services online. For these studies, Keynote utilized the [WebEffective](#) research tool to monitor 3,800 panelists across 20 sites, completing more than 40 different tasks on the sites. In addition, utilizing [Transaction Perspective](#), the studies incorporate service level data collected over a 30-day period to understand key performance factors. This data provides findings on best practices and the changes retailers can make to prevent revenue loss and customer abandonment.

Cohesive Customer Experience

Retailers have taken steps to create similarities across the store, catalog and online channels. Online, many sites have taken strides in fixing product description pages by adding alternate views, customer ratings and reviews, and instant chat. "Visual Appeal" is leading "Price Satisfaction" as a driver for both brand and conversion impact, and the attention paid to implementing these new features is paying off. The retail studies are crafted to capture seven metrics that drive conversion impact. These metrics include purchase inclination, recommendation, research, and return likelihood, as well as the probability of leaving the site for another site. The retail site's performance, navigation, search process, and purchase process all play a role in the customer's decision to buy.

Partners in the Cloud

As online retailing matures, a new phenomenon is impacting how retail sites perform. A lot of retailers are outsourcing the entire e-commerce function to another company or set of companies, or they are outsourcing major components of their online stores. With content, technology and infrastructure coming from multiple vendors in the "cloud", managing the end-user experience will become even more complex. For example, when Amazon's catalog engine started slowing down on Black Friday, it impacted the Target.com site as well, which was using the Amazon engine. Today, retailers with hybridized sites need to ensure that the vendors they are working with also have a commitment to end-user satisfaction. Companies that attempt to apply a data-centric view of the world (e.g. internal monitoring, system instrumentation) will not be successful in this environment. Cloud computing requires a radically new way of thinking about technical quality. Each piece, each part must work together in harmony to satisfy the user. The user doesn't care where the content server is, or what Web service is involved; they only care about it working well and working quickly. To meet the end user's increasingly high expectations, a new system of user-centric performance management will need to be put in place. When the culture of the company emphasizes user satisfaction, the care that goes into planning site infrastructure and site navigation is likely to be higher.

Best of the Internet Retailers

Keynote Competitive Research Books, Music, Movie & Game Retail Leaders - 2008			
Rank	Overall Customer Experience Ranking	Reliability Service Level Ranking	Responsiveness Service Level Ranking
1	Amazon	Barnes & Noble	Wal-Mart.com
2	Best Buy	Overstock.com	Best Buy
3	Overstock.com	Circuit City	Overstock.com

Retailers such as Best Buy, whose Web site problems are well in the past, have incorporated multiple levels of testing into their deployment process. In particular, capacity planning is built around extensive external testing, where all facets of the application, including partner participation, are exercised from the end-user perspective.

Keynote Competitive Research Consumer Electronic Retail Leaders - 2008			
Rank	Overall Customer Experience Ranking	Reliability Service Level Ranking	Responsiveness Service Level Ranking
1	Best Buy	Newegg.com	Wal-Mart.com
2	Amazon	Best Buy	Best Buy
3	Circuit City	Target	Dell

9. Best of Voice over IP in 2008

VoIP Service Providers Ranking

Twice yearly, Keynote publishes the VoIP Service Provider Study, which evaluates how end users experience the reliability and audio clarity of leading voice service providers. The study compares relative performance of AT&T landline service or POTS (plain old telephone service) with six broadband VoIP providers (AT&T CallVantage, EarthLink trueVoice, Lingo, Packet8, Verizon VoiceWing, and Vonage) and two cable voice service providers (Time Warner Digital Phone and Comcast Digital Voice) for one month by collecting data from calls made from residential locations in New York and San Francisco.

Overall, reliability is improving slightly, however audio quality is significantly different from the previous study. Keynote has been conducting VoIP studies for more than three years and has seen significant trends develop. For example, there is a serious disparity in reliability and audio performance between VoIP services on managed networks and those that rely on existing broadband home network connections. While conditions are dramatically improved for Comcast Digital Voice and Verizon VoiceWing customers, the best that other consumers can hope for is merely tolerable audio quality.

Keynote Competitive Research Consumer Electronic Retail Leaders - 2008		
Rank	Reliability Service Level Ranking	Responsiveness Service Level Ranking
1	AT&T Landline	Comcast Digital Voice
2	Time Warner Digital Phone	Verizon VoiceWing
3	Verizon VoiceWing	AT&T Landline

About Keynote

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