

Keynote[®] Ranking Studies



Keynote Rankings for Luxury Auto Manufacturer Web Sites

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Keynote's Mission: Improve eBusiness Success

Keynote's mission is to improve eBusiness performance worldwide by providing metrics and insights for customer experience, marketing effectiveness, application service levels, and competitive strategies.

The *Keynote® Rankings for Luxury Auto Manufacturer Web Sites* are part of a syndicated competitive intelligence program for understanding the customer experience and service levels of leading Web businesses.

The rankings are based on large-scale studies that employ Keynote's unique methodology and expertise to provide comparison metrics and insights into the operational excellence and customer experience of sites in an industry. Unlike other research of automotive sites, Keynote's approach uses actual consumer behavior and feedback in addition to quantitative measures of site reliability and responsiveness to provide a detailed understanding of the impact that these web sites have on consumers in the market for a luxury vehicle.

Keynote Methodology Overview

Measuring Customer Experience

Keynote's proprietary approach to customer research measures real people as they pursue real tasks on the Web.

By capturing customer feedback and behavior at the point of interaction with a site, and with accurate knowledge of their intent, Keynote is able to provide a complete understanding of their online experience and how it relates to the site's business outcomes. This realistic and in-depth view of the customer experience links companies with their customers and prospective customers and helps them to truly understand what they think, how they behave—and why.

For the study of luxury auto manufacturer Web sites, Keynote monitored over 2,600 consumers as they interacted with the following Web sites:

- Acura
- Audi
- BMW
- Cadillac
- Infiniti
- Jaguar
- Lexus
- Lincoln
- Mercedes Benz
- Saab
- Volvo

The consumers were asked to pursue goals and provide their reactions across a number of areas of site experience. The areas of site experience studied included:

- **Finding a Vehicle:** Exploring the auto site and finding a vehicle that the prospective customer was interested in purchasing. Reviewing price, features, and other criteria.
- **Viewing Vehicles:** Exploring the photos, videos, and any "360-degree views" available on the site.
- **Comparing Vehicles:** Finding at least two different alternative new vehicles and comparing all aspects of those vehicles including gas mileage, braking systems, safety ratings, trim levels, pricing, etc.
- **Customizing a Vehicle:** Selecting a specific model of interest and proceeding through the customization process, and obtaining a total price for the customized model.
- **Requesting a Quote:** Using the site to request a quote from the nearest dealer for a specific vehicle make and model.

Keynote Methodology



Consumers provided their reactions and answered questions while Keynote recorded their behavior and captured their responses using the proprietary Keynote customer experience methodology. More than 250 metrics were measured across each site.

Keynote then assessed the impact of the user's experience through a range of indices and a driver analysis to better understand which sites delivered the best business outcomes, and what were the key drivers behind this success.

Measuring Service Levels

To gather data on the operational excellence or service levels of sites in a study, Keynote uses its Transaction Perspective® measurement computers ("agents") to mimic the actions of a consumer using the Internet Explorer browser to find and request a quote for a vehicle on each of the luxury automotive sites in the study. The agents perform this transaction on each site once an hour between

8AM to 12AM EST for a one-month period. The agents track more than 35 performance metrics and collect over 6500 data points on each site. Keynote analysts use these data points to rank the sites in the study on each of seven key performance factors, which are critical aspects of an operationally excellent site.

Results: Customer Experience

Best Sites

The overall Keynote Customer Experience Ranking is the highest-level score of customer experience and is based on an aggregate score of site performance across all 250 customer experience indices and metrics measured in the study. The overall ranking shows which sites are most successful in terms of satisfying customers, driving customer acquisition, and supporting the company's brand.

Of all the sites included in the study, Cadillac, Lexus and Saab were the most successful overall, providing the most effective experience for consumers researching an auto purchase online.

Keynote Customer Experience Ranking

Rank	Luxury Auto Manufacturer Web Sites
1	Cadillac
2	Lexus
3	Saab

Specific Areas of Success

The best sites are determined by their success in driving leading business outcomes: customer satisfaction, brand impact, and customer acquisition. The Keynote study benchmarks site success in each of these specific areas. Winners in the area of customer satisfaction and conversion (customer acquisition) are detailed below.

Customer Satisfaction Index

Rank	Luxury Auto Manufacturer Web Sites
1	Cadillac
2	Lincoln
3	Lexus

Cadillac, Lincoln and Lexus were the top rated luxury auto sites in terms of customer satisfaction. Users of these luxury auto sites were generally more satisfied, experienced less frustration and found the site easier to use than visitors to the other sites in the study.

Conversion Index - Online

Rank	Luxury Auto Manufacturer Web Sites
1	Lexus
2	Cadillac
3	Volvo

Conversion Index – Offline

Rank	Luxury Auto Manufacturer Web Sites
1	Lexus
2	Volvo
3	Saab

Lexus and Volvo led the Conversion Indexes, which measure the effectiveness of a site in driving customers back to the site or to a dealership in the future. Prospective customers visiting sites topping the Offline Conversion Index were more likely to test drive or purchase a vehicle from that company.

Success Drivers and Best Practices

Keynote also conducts a sophisticated statistical driver analysis to determine which aspects of site experience had the most impact on a site's success. This driver analysis not only explains "why" sites perform the way they do, but also demonstrates which areas of improvement the sites should focus on in order to have the biggest impact on their desired business outcomes.

The drivers that had the most impact on customer satisfaction, conversion, and brand affinity were overall product satisfaction, the visual appeal of a site, and the vehicle search process.

Top Impact Drivers

Rank	Drivers
1	Product Satisfaction
2	Site Visual Appeal
3	Find Vehicle Process

Keynote then competitively benchmarks sites across these drivers—and determines the key factors contributing to success in these areas.

Visual Appeal

Rank	Luxury Auto Manufacturer Web Sites
1	Cadillac
2	Jaguar
3	Lexus

Cadillac, Jaguar and Lexus topped the Visual Appeal category by providing sites that consumers thought were well-designed, uncluttered and visually appealing.

Qualitative Feedback

To better understand why sites perform the way they do on a given driver, Keynote analysts review the best of breed sites in conjunction with the qualitative feedback provided by panelists during the study.

For example, in the Visual Appeal category, prospective customers particularly liked the Cadillac site because of its clear and simple layout and good use of colors and photos. Some specific comments prospective customers made about the Cadillac site included:

Clear and simple layout

- “Clean layout, models along the top, navigation very plain to see, attractive imagery.”
- “Colors and simplicity of the page are nice. Not too many things going on...”

Good use of colors and photos

- “I like the way it refreshes images for each vehicle. Colors of the site look great.”
- “I liked the colors used in the background. It’s quite inviting.”
- “Pictures are enticing.”
- “Colors are nice, dignified, fit with Cadillac image.”

Results: Service Levels

Using extensive measurement data and analysis, Keynote benchmarked leading luxury auto manufacturer Web sites in two major categories:

Reliability—Measures a site’s ability to service its customers without errors or outages

Responsiveness—Measures a sites’ ability to provide highly responsive and consistent page downloads

Reliability

To obtain the overall Reliability Ranking, Keynote evaluates and compares the sites according to their performance on two Key Performance Factors:

- Availability
- Outages

Each of these Key Performance Factors is comprised of many underlying detailed metrics.

Keynote Service Level Ranking for Reliability

Rank	Luxury Auto Manufacturer Web Sites
1	Jaguar
2	Lexus
3	Saab

Jaguar, Lexus and Saab were the top rated sites in terms of reliability, indicating those sites were highly available and experienced little or no downtime.

The study revealed that the luxury auto industry has some of the most complex Web pages of any industry, with almost every site using rich media content. The homepages of the sites included in the Keynote study averaged about 700K in size, which is approximately 400% larger than homepages in other industries evaluated by Keynote.

Despite the complexity and weight of the pages, most of the luxury auto sites studied provided excellent performance for broadband users. However, the experience for a dial-up user was quite different, with those users facing homepage download times close to a minute and a half (80 seconds).

Responsiveness

To obtain the overall Responsiveness Ranking, Keynote evaluates and compares the sites according to their performance on five Key Performance Factors:

- High Speed Response
- Dial-up Response
- Response Time Consistency
- Geographic Uniformity
- Load Handling

Each of these Key Performance Factors is comprised of many underlying detailed metrics.

Keynote Service Level Ranking for Responsiveness

Rank	Luxury Auto Manufacturer Web Sites
1	Lincoln
2	Acura
3	Jaguar

The Lincoln, Acura and Jaguar sites were ranked as the best in terms of site responsiveness, an indication of how fast the sites were in down loading pages and the array of images that are typical on luxury auto sites.

Keynote found a large gap between the leading sites and the lower ranking sites in the study. The top ranked sites were available better than 99% of the time, while the bottom five sites averaged just 92% with several of the poorer sites registering over 50 hours of outage in a single month.

Keynote Rankings for Luxury Auto Manufacturer Web Sites

This abstract highlights findings from the Keynote Rankings for Luxury Auto Manufacturer Web Sites. The full product contains hundreds of metrics and includes additional information not only identifying the best and the worst Web sites in certain categories, but also providing specific detail about why the sites ranked where they did. The following measurements provide additional insight:

Keynote Drivers

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 impact on site success. The factors that have the greatest relationship to these site effectiveness indices reveal which areas of the site experience should get the most attention in order to improve critical site outcomes.

Cross-Site Segmentation

Segmentation provides insights about how certain customer profiles interact with and respond to each site in the study. Keynote compares key metrics across the largest and key segments of the industry, such as high income individuals.

Qualitative Analysis

Using special qualitative analysis tools, the Keynote research team analyzes participant comments to identify and compare common themes across all of the sites in the study. Since our qualitative algorithms are the same across each of the reports, these tools provide a fair and quantitative way to compare customer verbatims across reports.

Web Norms Comparisons

Participants in the study do not compare their site experiences just among competitors in a particular industry; they also compare their experiences to those presented by other types of sites. Keynote provides site comparisons against larger web norms so that companies not only know how they compare to their own industry averages, but also to web norms across industries. Keynote web norms are derived from hundreds of evaluations run across many major industries.

Longitudinal Comparisons

Keynote Rankings provide a solid base for longitudinal comparisons and benchmarking. Each iteration of the study uses a similar study design, and the analysis is based upon standard Keynote metrics, resulting in data that can be easily benchmarked and compared over time.

Keynote Systems

Keynote Systems, The Internet Performance Authority®, is the worldwide leader in e-business performance management services. Over 2,300 corporate IT departments and 13,000 individual subscribers rely on Keynote's growing range of measurement and monitoring, service level and customer experience management services to improve e-business performance by reducing costs, improving customer satisfaction and increasing profitability.

For More Information

If you have a specific question about the information contained in this Keynote study, please contact us at 650-403-2400 or online at www.keynote.com.