

Keynote[®] Ranking Studies



Keynote Rankings for Retail-Apparel 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 into customer experience, operational excellence, and competitive strategies on the Web.

The *Keynote Customer Experience Rankings for Retail Apparel Web Sites* and the *Keynote Service Level Rankings for Retail Apparel Web Sites* are part of a syndicated competitive intelligence program designed to benchmark and improve the operational and business performance 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 best practices. Unlike other research, 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 Web sites have on consumer perceptions and behavior.

Keynote Methodology Overview

Measuring Customer Experience

Keynote's proprietary approach to customer experience 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 business goals. 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 *Keynote Customer Experience Rankings for Retail Apparel Web Sites*, Keynote monitored over 2,000 prospective retail customers as they interacted with the following Web sites:

- Banana Republic
- Eddie Bauer
- Gap
- JC Penney
- Kohl's
- LL Bean
- Macy's
- Neiman Marcus
- Nordstrom
- Saks Fifth Avenue

The prospective customers were asked to pursue goals and provide their reactions across a number of areas of site experience. 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 for each site included in the study.

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.

Keynote Methodology



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. The agents used for this study were located throughout the U.S. and were connected to the Internet from both broadband and dial-up connections. The agents performed transactions, collecting details of site performance and reliability during a one month period. The agents tracked more than 40 detailed performance metrics and collected over 6500 data points on each site. Keynote analysts used these data points to rank the sites in the study on each of seven key performance factors, which are critical aspects of the operational excellence of a retail 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 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, L.L. Bean was the most successful overall, providing the most effective online experience for retail apparel customers.

Keynote Customer Experience Ranking

Rank	Retail-Apparel Web Sites
1	L.L. Bean

Specific Areas of Success

The best sites are determined by their success in driving business outcomes including customer satisfaction, brand impact and customer conversion (acquisition). The study benchmarks site success in each of these specific areas.

Brand Impact Index

Rank	Retail-Apparel Web Sites
1	L.L. Bean

The L.L. Bean site also was the top rated sites in terms of positive brand perceptions. Customers using sites topping the Brand Impact Index were generally more satisfied, experienced less frustration, and ultimately formed a more favorable impression of the brand as a result of their experience on those sites.

Conversion Impact Index

Rank	Retail-Apparel Web Sites
1	L.L. Bean

L.L. Bean also topped the Conversion Impact Index. Prospective customers visiting sites topping the Conversion Impact Index were more likely to state an intention to purchase an item on, or return to those sites, in the future.

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 site 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 areas such as customer conversion (acquisition) and brand affinity on apparel sites price satisfaction, visual appeal of the site and product satisfaction.

Top Impact Drivers

Rank	Retail-Apparel Web Sites
1	Price Satisfaction
2	Visual Appeal
3	Product Satisfaction

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

Visual Appeal

Rank	Retail-Apparel Web Sites
1	Gap
2	Eddie Bauer
3	L.L. Bean

For instance, the Gap, Eddie Bauer and L.L. Bean topped the rankings in the Visual Appeal category.

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.

In the Visual Appeal category, customers particularly liked the simple and clean layout and the colorful photos on the Gap site:

Simple and clean layout

- *“I liked the clean visuals and easy to navigate page.”*
- *“I like how the site is simple and clean.”*
- *“The site is beautiful and well thought out.”*

Appealing and helpful photos

- *“The pictures were large enough to get a good idea what the item looks like.”*
- *“I love how you can see big / enlarged photos of every color that’s available.”*

Results: Service Levels

Best Sites

Using extensive measurement data and analysis, Keynote benchmarked leading online retail apparel 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, both of which are comprised of several underlying metrics:

- Availability
- Outages

Keynote Service Level Ranking Reliability

Rank	Retail–Apparel Web Sites
1	JC Penney

The JC Penney site was the top rated in terms of reliability, indicating that site provided better reliability than its direct competitors.

Responsiveness

To obtain the overall Responsiveness Ranking, Keynote evaluates and compares the sites according to their performance on five Key Performance factors, all of which are comprised of several underlying metrics:

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

Keynote Service Level Ranking Responsiveness

Rank	Retail–Apparel Web Sites
1	Kohl’s

The Kohl’s site was the industry’s best in terms of site responsiveness, an indication of how fast sites were in comparison to their competitors.

Keynote reports that, in part because loads have increased significantly over the past year, many retail sites are not prepared for the holiday load and are having trouble handling current Summertime visitor loads. Some major retail sites are having difficulty staying up to industry standard 99.5% availability, and most all sites are experiencing small outages.

Keynote Rankings for Retail Web Sites

This abstract highlights findings the *Keynote Customer Experience Rankings for Retail Web Sites* and the *Keynote Service Level Rankings for Retail Web Sites* studies. The full studies contain hundreds of metrics and include 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 Rankings Study, please contact us at 650-403-2400 or online at www.keynote.com.