



# DIGITAL EXPERIENCE INDEX AND NPS<sup>†</sup> RANKINGS

Q4 2018 EDITION

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# | What Does It Take to Be Exceptional in Digital?

## Digital leaders hold strong in Q4—with some surprise shifts among the top 50

The elements of digital success aren't mysterious. High-performing companies like Amazon and Netflix—and digitally-savvy traditional companies like Walmart—are up front and consistent about the three things they obsess over: customer needs, data, and continuous improvement. But their real secret sauce is something less tangible and more challenging to achieve: digital discipline.

That's the "virtuous cycle" element to digital Voice of Customer (VoC) leadership:

1. The more you understand your customers, the better you can deliver on their needs and prioritize improvements.

2. When you improve experiences, customers are more satisfied and more likely to recommend your brand—more customers lead to more data and more insights.
3. Capitalize on that data to improve your digital leadership position.

Companies that do nothing will lose ground to those that continually improve the customer experience. The ability to galvanize your organization around feedback and prioritize decisions to align with experience is an undeniable business opportunity. ForeSee, now part of Verint, The Customer Engagement Company, puts that kind of digital discipline at the heart of the strategies we deliver to our own customers.

## Steady Leaders and Big Movers

In our Q4 Digital Experience Index (DXI), we see the top four performers from Q3 retaining their positions—but also raising their Net Promoter Scores<sup>SM</sup> (NPS):

	NPS	CHANGE
Netflix	67	+3
PayPal	65	+2
Amazon	58	+2
Google	58	+5

This quarter also saw major moves, both up and down the DXI ranking:

BIGGEST INCREASES		BIGGEST DROPS	
LinkedIn	+12 NPS	Tumblr	-20 NPS
Bing	+10 NPS	Gamepedia	-12 NPS
Instagram	+8 NPS	Twitch	-11 NPS



## Mobile Keeps Growing, But Isn't a CX Cure-All

We turn to our mobile devices more often than ever, and for a wider variety of reasons. Virtually every business is trying to make the most of the convenience and efficiency mobile offers—most times they deliver, but some mobile experiences aren't cutting it for consumers.

Retail is one of the industries that benefit from mobile more and more every year. Our Q4 data shows that:

- 56% of purchases that started in a digital channel began in mobile, a “holiday bump” from Q3's 40%.
- 40% of shoppers say mobile was their preferred way to research prior to purchase—one-third more than those preferring desktop and almost twice those who prefer to research in store.

- 40% also reported using a mobile device as part of the shopping experience while they were in a retail store.

In the banking world, however, mobile isn't all things to all customers. Digital is definitely the preferred way to interact with financial institutions, but each channel has task-specific strengths:

- Desktop users typically come to pay bills, while mobile users check balances.

And when it comes to task completion, our research shows that not all channels are performing equally:

- Only 33% of mobile users reported being able to accomplish tasks on the first try, but more than 50% of desktop visitors said the same.

## Digital-First Customers Reward Disciplined Brands

What's the digital experience mindset at your organization? Is it consistent or disjointed? You may or may not have a clear idea, but your customers sure do—one or two visits to your site or app is all they need. Digital insights like the ones surfaced in our Index can help retailers, banks, and other businesses fine-tune experiences based on customer type, device, task, or other element. Read the rest of our DXI to see who's delivering and who's not according to consumers themselves.

Verint ForeSee's quarterly Digital Experience Index benchmarks customer experience of the 50 most popular websites in the U.S. The brands are drawn from Amazon's Alexa.com top sites and the Fortune 1000. The rankings and other conclusions in this edition are based on 12,710 survey respondents.

# The DXI 50

## How 50 of the top websites in the U.S. rank on NPS

RANK		NPS	CHANGE	RANK		NPS	CHANGE	RANK		NPS	CHANGE	RANK		NPS	CHANGE
1	Netflix	67	+3	14	Walmart	42	+4	27	Intuit	30	+1	40	Twitter	20	-2
2	PayPal	65	+2	15	American Express	40	+1	28	Twitch	30	-11	41	Facebook	19	-1
3	Amazon	58	+2	16	Trip Advisor	38	-6	29	Yahoo	30	+5	42	Stack Exchange	18	-7
4	Google	58	+5	17	UPS	38	-2	30	GameSpot	29	-3	43	USA Today	18	+2
5	Hulu	51	+3	18	Home Depot	36	-2	31	Wells Fargo	29	-7	44	CNN	18	+3
6	YouTube	49	+2	19	Ebay	36	-2	32	Vice	25	-2	45	Vimeo	14	-4
7	IMDb	49	+4	20	Capital One	35	-8	33	Citi	24	+3	45	Xfinity	14	-2
8	Instagram	49	+8	21	Fox News	35	-3	34	Bing	23	+10	47	Huffington Post	14	0
9	Target	48	+2	22	ESPN	34	+2	35	Gamepedia	22	-12	48	AOL	3	-4
10	Apple	44	-5	23	Adobe	33	-6	36	Office/ Outlook	21	+3	49	Tumblr	2	-20
11	Chase	44	0	24	Bank of America	33	0	37	LinkedIn	21	+12	50	Diply	-2	+5
12	Best Buy	44	-2	25	CNET	31	-3	38	MSN	20	+3				
13	FedEx	43	+2	26	Microsoft	31	+2	39	Salesforce	20	0				

NPS is measured on a scale of -100 to 100  
+/- NPS change compared to Q3

# Digital Experience Driver Scorecards

The DXI measures four key drivers that impact a visitor’s overall satisfaction with their experience: navigation, look and feel, site information, and site performance. The charts below show who’s delivering the top 10 winning digital experiences for each driver. The scores for each driver are based on a scale of 0 to 100.

RANK	NAVIGATION		CHANGE FROM Q3	LOOK AND FEEL		CHANGE FROM Q3	SITE INFORMATION		CHANGE FROM Q3	SITE PERFORMANCE		CHANGE FROM Q3
1	Netflix	86.3	↑	Netflix	87.6	↑	PayPal	87.5	↑	PayPal	87.5	↑
2	PayPal	85.4	↓	PayPal	86.3	↑	Netflix	86.0	↓	Netflix	86.4	↑
3	Google	84.6	•	Google	85.9	↑	Google	85.8	↑	Google	86.2	↑
4	Amazon	84.6	↓	Instagram	85.9	↑	Amazon	84.8	↓	Amazon	85.4	•
5	YouTube	83.1	↓	Amazon	85.1	↓	IMDb	84.7	↑	Chase	84.0	↑
6	Instagram	82.9	↑	Target	84.2	↑	Instagram	84.1	↑	Bank of America	83.9	↓
7	Chase	82.6	↓	Hulu	83.8	↑	American Express	84.1	↑	American Express	83.7	↓
8	Capital One	82.6	↓	American Express	83.6	↓	Citi	84.1	↑	Apple	83.5	↓
9	American Express	82.3	↑	Chase	83.4	↓	Bank of America	84.1	↓	IMDb	83.0	↑
10	Citi	82.1	↑	Apple	83.3	↓	Wells Fargo	83.9	↑	Wells Fargo	82.9	↓

• No change in score  
 Driver scores are based on customer satisfaction scores, not NPS

# Industry Spotlight: Battle of the Banks

PayPal and Chase lead the category again this quarter, ranking second and eleventh, respectively. Aggregate NPS for banking sites fell three points to 36, due to big drops in NPS for Capital One (-8) and Wells Fargo (-7). Lower scores are common during the holidays when online transactions and e-commerce activities peak.



NPS rose two points to 65.

NPS remained flat at 44.

Site information and site performance scores also increased.

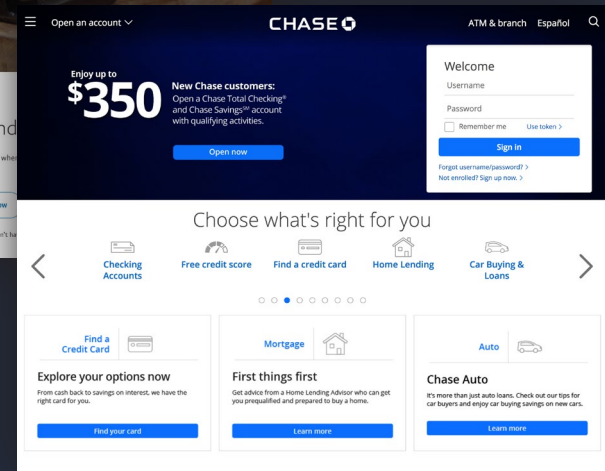
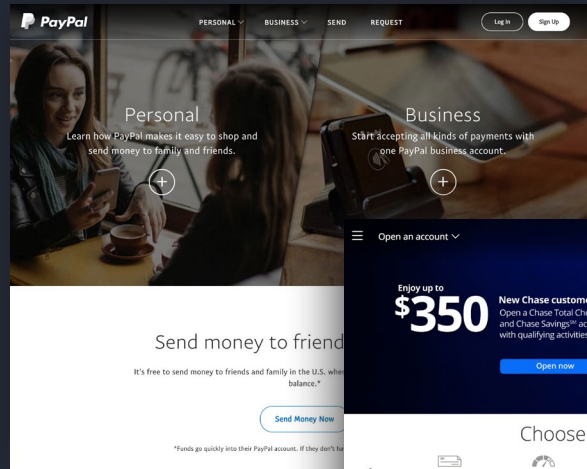
All four driver scores dropped.

The proportion of PayPal visitors saying that they used the PayPal mobile site/app at least five times in the past 30 days nearly doubled from Q3.

The proportion of frequent mobile site/app users rose over Q3, but at less than 50%—anemic in comparison to PayPal.

46% of users say they prefer using the mobile site or app over the desktop website.

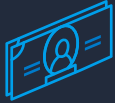
37% of users prefer the mobile site or app, and only 16% prefer a non-digital channel (e.g., branch location, call center).



# Brand Spotlight: Walmart E-Commerce Investments Click With Shoppers



**41%** said the retailer's site made holiday shopping easier.



Visitors coming to the site to make a purchase in Q4 increased by **50%** over Q3.



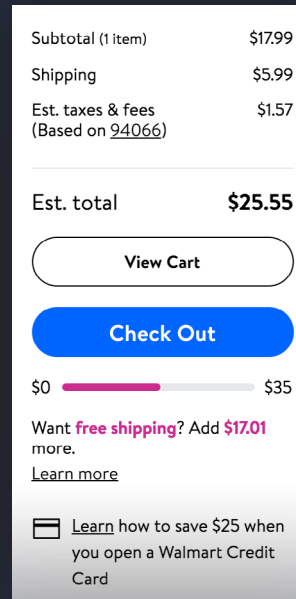
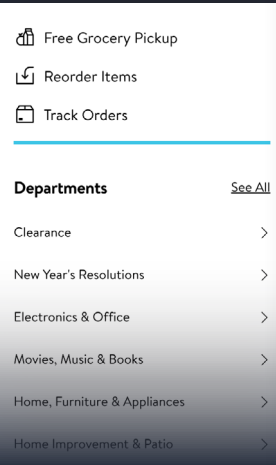
Nearly one fourth of all purchases started in mobile in Q4, up **50%** from Q3.



**One third** of all non-digital purchases involved a digital channel at some point in the journey.

According to Walmart.com visitors in our findings.

Strategic quick links aid returning customers in routine tasks such as ordering items, purchasing groceries, and tracking orders.



A progress bar on the shopping cart page shows customers how close they are to qualifying for free shipping.

Usability analysis shows some key features that help Walmart's digital channels be successful.

# Digital Experience Driver Analysis

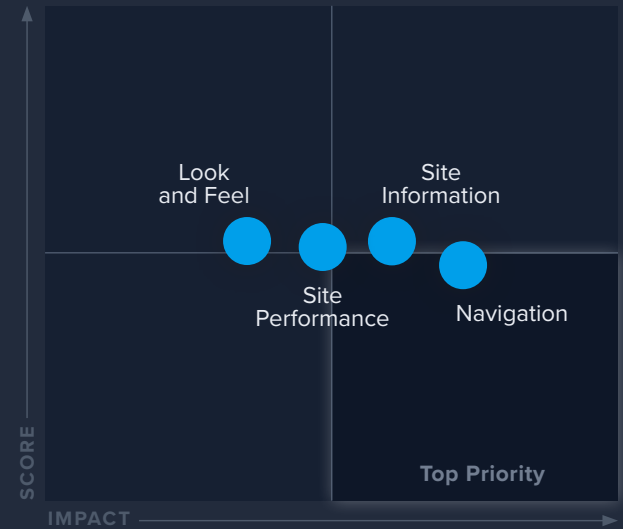
ForeSee priority maps help companies evaluate and categorize drivers according to their impact on consumer satisfaction. Navigation remained a top priority for Walmart, but the impact of site performance nearly tripled in the fourth quarter of 2018, underscoring its importance to customers during the holiday season.

## Walmart

Q3



Q4



Priority maps use customer experience data to show which CX improvements will yield the biggest business benefits. In this map, the horizontal axis shows impact on satisfaction, while the vertical axis shows performance for that driver attribute. Therefore, the drivers located in the bottom right quadrant are ripe for prioritization due to their relatively high impacts and low score.



# About the Digital Experience Index

This edition of the Digital Experience Index (DXI) benchmarks the digital experience of the 50 most popular websites in the U.S. based on Amazon's Alexa.com top sites and the Fortune 1000. The study used a panel sample of 12,710 survey respondents, representative of the U.S. general population, with at least 250 responses for each website. Responses were collected in the first half of December 2018. Sites are ranked according to NPS on a scale of -100 to 100 and have a margin of error of approximately +/-7.9. When two or more scores are identical at one decimal place, the next decimal place is used to break ties and determine rankings. Driver scores use a scale of 0 to 100 and have a margin of error of approximately +/- 2.0.

## About Verint ForeSee

ForeSee joined Verint, The Customer Engagement Company, in 2018 and is now Verint ForeSee. The combination creates the industry's most comprehensive omnichannel VoC portfolio. Organizations that work with Verint ForeSee leverage

analytics-rich offerings that allow them to improve how they measure and understand customer experiences while prioritizing the improvements that will have the greatest business impact. Learn more about Verint at [verint.com](https://verint.com).

## About the Research Team

**José R. Benkí**, PhD, is Senior Research Scientist at ForeSee and Adjunct Assistant Research Scientist in the Survey Research Center at the University of Michigan. He has expertise in survey participation, interviewing, speech science, and cross-cultural and cross-language survey research. He is a member of the American Association for Public Opinion Research and the Acoustical Society of America.

Senior Analyst **Jeff Sylvester** uses his data-science and market-research expertise to help ForeSee's clients advance their CX programs. Jeff also leads survey design and internal analyst training initiatives for ForeSee.

Let's talk digital VoC—get in touch for a customized briefing.

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