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2015 BEST OF THE WEB

DIGITAL PERFORMANCE AWARDS

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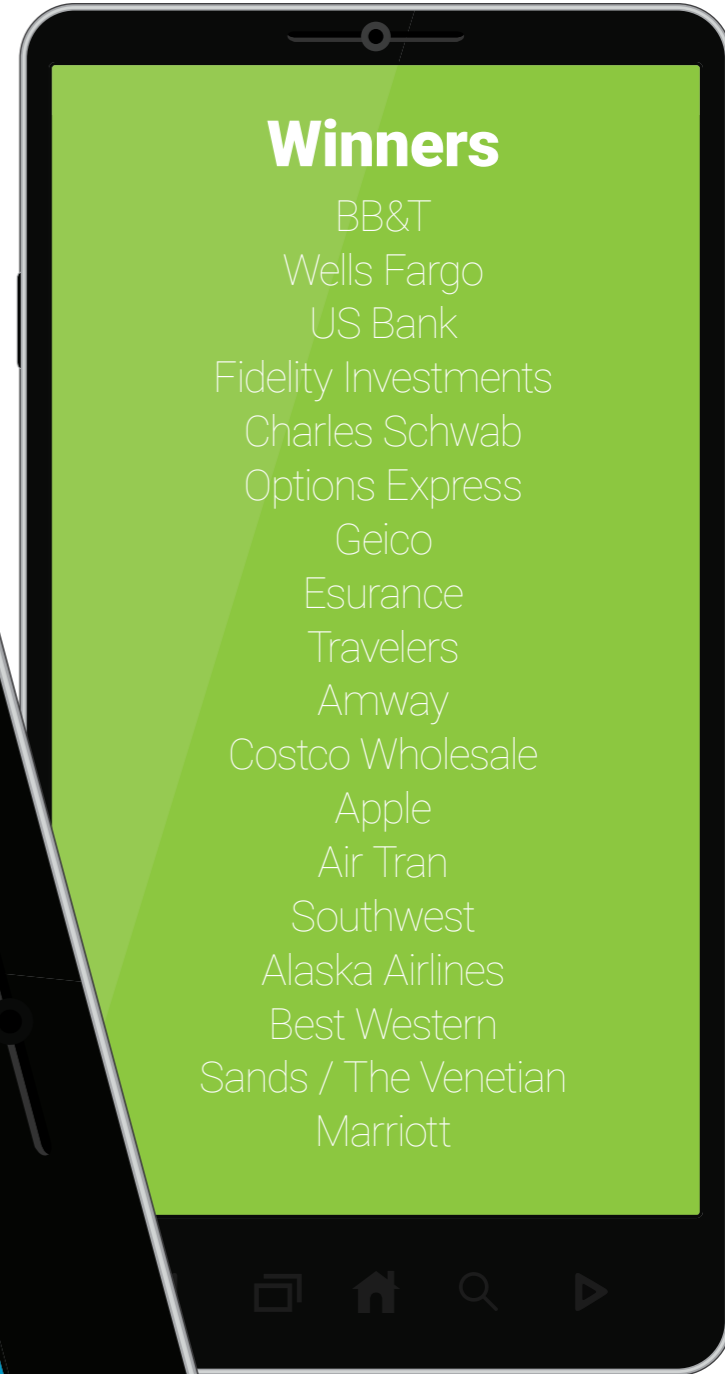
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BEST OF THE WEB

DYNATRACE 2015 BEST OF THE WEB DIGITAL PERFORMANCE AWARDS

Digital has changed the game of business. Organizations across all industry sectors are experiencing a major transformation due to the digital explosion, which not only enhances traditional approaches, but enables new customer interactions and business models.

Customers are digital, they want anytime, anywhere access. They don't compartmentalize their interactions — they experience journeys with brands. Accordingly, today's leading businesses take on transformational journeys to understand and serve customers across digital and physical touchpoints.

Such radical changes can't be addressed with a bolt-on strategy where supporting applications are managed in silos: omni-channel customers drive need for omni-channel management. Companies must have a broader picture of customer behavior to better understand and serve them in innovative ways, and to deliver exceptional user experiences at the customer's moment and place of need.

Customer-driven business leaders adopt an "outside-in" view using holistic customer-centric analytics from all digital interactions with web, mobile web or mobile apps. This user experience viewpoint enables them to identify and solve application, technical and design issues that are impediments to adoption and conversion.

The winners of the sixth annual Dynatrace Best of the Web awards are digital transformation leaders. This report recognizes these top performers across five major U.S. industries — banking, brokerage, insurance, retail and travel — and provides insights into what makes their efforts so effective.

New this year to the Best of the Web awards is our overall ranking approach, which combines many performance metrics into a unified rank that evaluates the entire digital experience for availability, response time for homepages and key transaction replays.

Dynatrace Benchmarks were used to comprehensively measure and compare the online performance of top companies' mobile and web sites throughout 2014. The results were combined to identify the winners in each industry vertical with gold, silver and bronze awards.

CONSUMERS

83% of shoppers browse online before purchasing

58% use smartphones to comparison shop while in store and...

68% then leave to purchase elsewhere based on what they found

RETAILERS

28% of the top 500 retailers do not have mobile-optimized websites

48% don't have a mobile application

**15%** Retailers with mobile apps grow 15% faster on average

THE DIGITAL IMPERATIVE

Consumers are omni-channel and demand great experiences across smartphones, tablets and PCs. In order to be successful in this new digital paradigm, leaders need to manage and optimize all of their customers' digital touchpoints. Google revealed that 90% of people use multiple screens sequentially, other studies showed that 83% of shoppers browse online before purchasing in stores, 58% use their smartphones while shopping in-stores, 68% changed their mind based on information they found, and 26% even purchase on their smartphone while in stores.

Mobile devices are an intricate part of our lives: 79% of users check their smartphone within 15 minutes of waking up, 60% of adults don't go an hour without checking their smartphone or tablet and over 90% of mobile users accessed a mobile eCommerce web property, compared with only 78% of desktop web users. Mobile shopping also hit a record high with 80% growth in 2014, four times higher growth compared to eCommerce.

This past holiday season, a Dynatrace survey revealed that 61% of US millennials planned to purchase more via mobile than in physical stores. Additional industry reports reveal that mobile accounted for 70% of Walmart's traffic during the five-day period between Thanksgiving and Cyber Monday.

72% of the top 500 retailers have mobile-optimized websites. Yet despite this mobile explosion, only 52% have a mobile application, even though the retailers that do grow 15% faster on average.

The digital age holds great potential, but also empowers users in ways that can put brand reputation at risk: 44% of US consumers and 61% of French consumers, will air their frustrations on social media or app stores after they've had a bad experience. And, customer expectations are on the rise. Recent studies revealed that 60% of consumers rate performance/response time as the #1 mobile app expectation ahead of features and functionality. Our study showed that 80% will abandon a site or app when they encounter errors or crashes and 46% will shop elsewhere if an app or a website takes more than 3 seconds to react.

With online revenue, loyalty and brand image dependent on how well critical business applications perform, organizations need to manage user experience performance across all digital touchpoints.

RETAIL BANKING

BB&T

WELLS FARGO

us bank
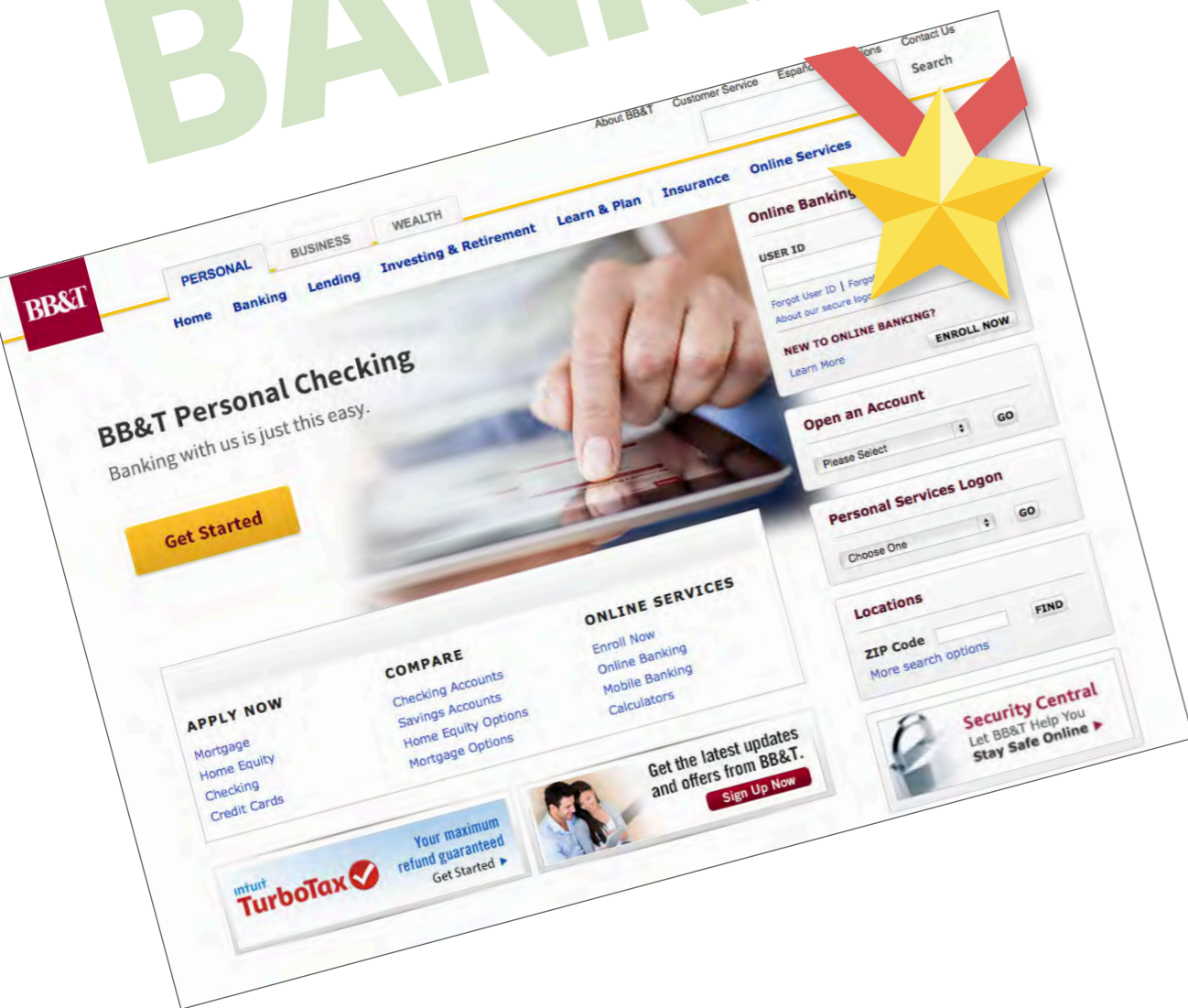
Banks are under increasing competitive pressure. New, purely online banks have been cropping up and customers are showing a willingness to do banking anywhere, anytime.

In 2014, 51% of US smartphone owners used mobile banking, and 3-in-10 smartphone and tablet owners said they would change banks if a mobile app wasn't up to par. Banks need to deliver a high-quality, seamless experience across all delivery channels to drive **online adoption**.

Each retail banking winner delivered top customer experience performance throughout the year across digital channels, exemplifying a unified strategy to meet customers' needs regardless of how they are accessing their sites.
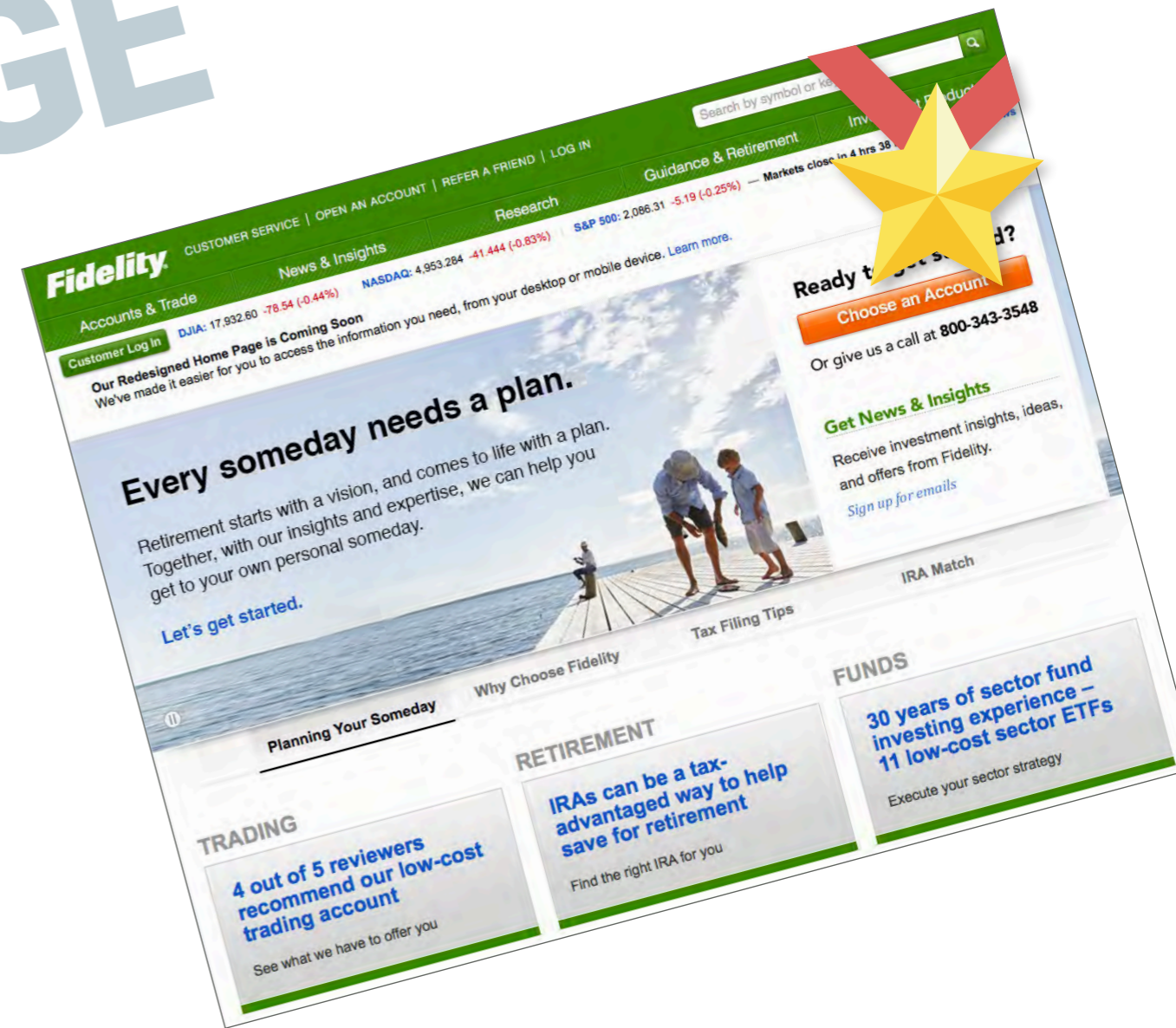
3 in 10 smartphone and tablet owners said they **would change banks** if a mobile **app wasn't up to par**

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* For detailed Retail Banking industry results, contact the Dynatrace Benchmark Team

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BROKERAGE

Fidelity · charles SCHWAB · optionsXPRESS by charles SCHWAB

If a customer wants to quickly react to a volatile stock market, they require a web site or mobile app that is available and responsive 24/7 for smooth interactions and transactions. The key strategy for brokerage firms is **reliability**, reinforcing their position as a trusted partner that will help a customer save money and protect and build wealth.
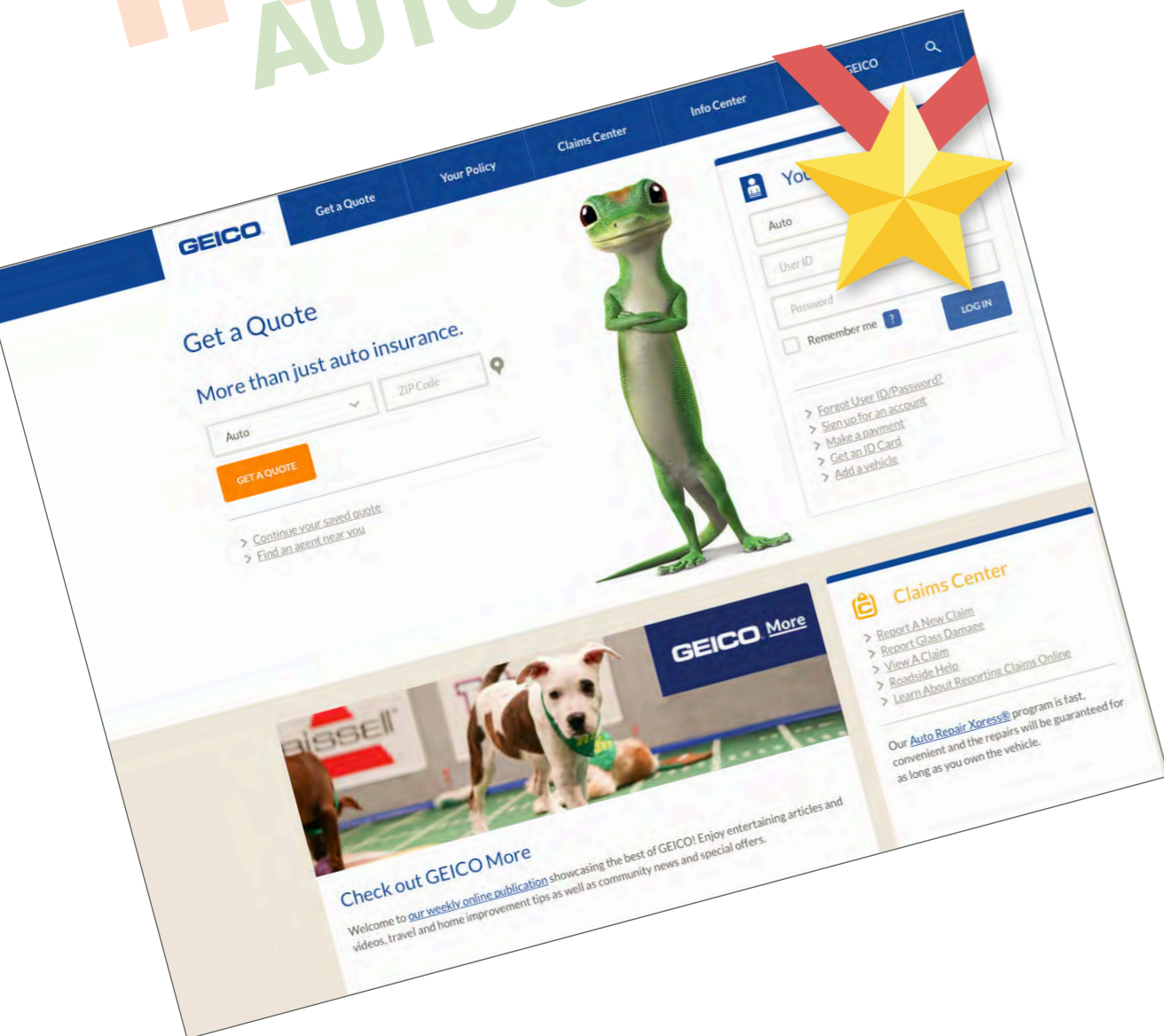
The brokerage 2015 Best of the Web winners met this reliability challenge. Gold winner Fidelity, a top performer and an award winner for the past 6 years, provided stellar performance throughout the year.

If a customer wants **to quickly react** to a volatile stock market, they **require a website that is available** **24/7**

BEST OF THE WEB

Upwards of
40%
change insurers annually

A whopping
80%
of consumers **go online to get insurance quotes**

GEICO®

esurance an *Allstate* company

TRAVELERS

When people look for an insurance contract, the first step they take is to look at comparison engines for pricing; a whopping 80% of consumers go online to get insurance quotes. Customer loyalty is a challenge; upwards of 40% change insurers annually and if one or more insurer has similar pricing, the next differentiator is a convenient mobile site and app.

Insurers also need to strive to make their operations more efficient and enhance the customer experience. Objectives for insurers include systems that are responsive 24/7 for agents, brokers and aggregators, and able to support a frictionless quote process in minutes– or risk losing business to the competition.

The key strategy here is **retention**. To improve retention and renewals, insurers must provide a leading digital experience across all channels, and proactive engagement on problems through error detection.

When looking at this year's winners, Geico 's results highlight a unified strategy for delivering a great experience across their digital assets and effectiveness in delivering on its digital strategy.

RETAIL

Amway | **Costco WHOLESALE** |
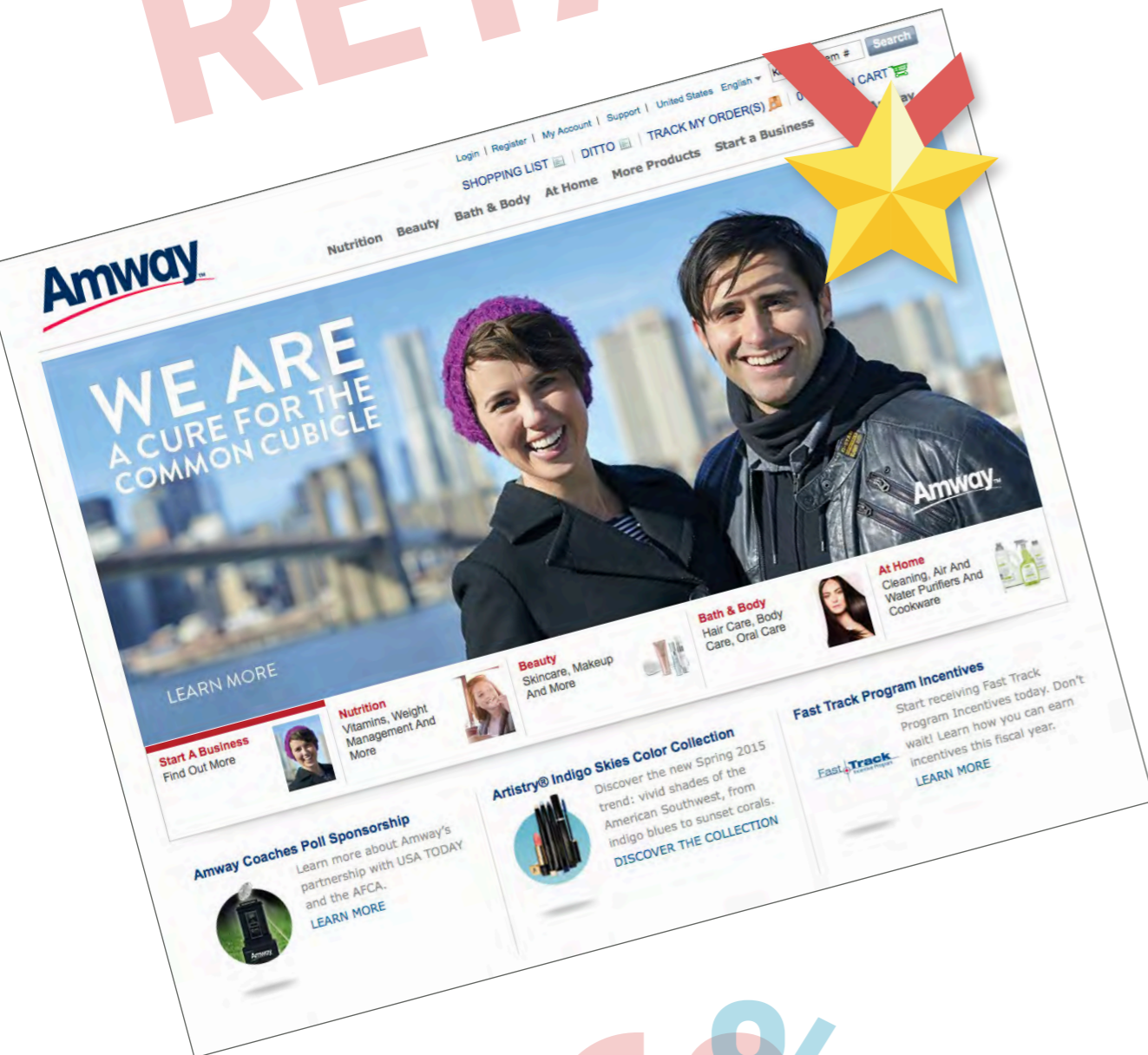
There's no doubt consumers like to shop online, and now, with more and more sites being optimized for mobile, online purchases will continue to skyrocket. Walmart.com, for one, saw 70% of its traffic come via mobile devices from Thanksgiving through Cyber Monday in 2014. Some 76% of US millennials said they will use mobile to search for and/or buy gifts, and 58% say they would purchase from a company with a good mobile app user experience.

But most customers will travel across web and mobile on their buying journey, so it is imperative for retailers to offer an online shopping experience that is seamless across all touchpoints — or consumers will turn to the competition. What is most telling is that 86% of customers who have a bad first experience with a retailer's mobile app will never return to give it a second chance.

The key strategy here is **conversion**, with user experience as the number one contributor. You may have great products and prices, but you need to deliver an equally great purchasing experience to close the deals. 60% of consumers rate performance/response time as the number one mobile app expectation — ahead of features and functionality.

60% of consumers **rate performance/response** time as the **number one** mobile app **expectation**

86% of customers **who have a bad first experience** with a retailer's mobile app **will never return** to give it a second chance

TRAVEL

2015 Airline Winners

- ★ airTran
- ● Southwest
- ● Alaska Airlines

2015 Hotel & Resorts Winners

- ★ Best Western
- ● Sands / THE VENETIAN
- ● Marriott

Consumers are empowered by information; they now have real-time access to flight, hotel and car-rental options and transparency when it comes to pricing. They turn to online travel sites early on to conduct research and plan their trips, and continue to use comparison engines to help them get the best prices.

Airlines and hotels may offer loyalty points to incent people to keep coming to them, but web and mobile sites that perform well, are easy to use and have innovative features that help drive retention and transactions.

The new methodology behind this year's Best of the Web report (combining overall web and mobile web performance) helped AirTran cement their gold metal results. AirTran's mobile efforts, while strong, were certainly buoyed by their outstanding performance in web, last mile and user transactions.

Others can learn from this type of unified strategy as they work in the year ahead to deliver successful experiences across digital touchpoints. Of note is the fact that AirTran, a subsidiary of Southwest Airlines, was fully integrated into Southwest on December 28, 2014 – bringing the two top digital performers together In the hotel & resort segment of the industry, Best Western captured gold for the fourth consecutive year.

BEST OF
THE WEB

WHAT CAN ORGANIZATIONS DO TO BE COMPETITIVE?

The three key ingredients successful digital businesses must manage are customer experience – to drive higher conversions; application performance — to simplify operations; and continuous delivery — to speed up innovation. The 2015 Dynatrace Best of the Web winners have demonstrated these capabilities.

Revenue, customer retention and brand image all hinge on supporting application performance. How well do your web and mobile web sites perform? Do they deliver a quality user experience? Is speed a concern?

If you want to know how well your site stacks up, **Dynatrace offers a free Performance Test** to benchmark against industry peers. The test also provides a detailed report on how well your web and mobile sites are operating and a comparison by vertical industry and geographic locations.
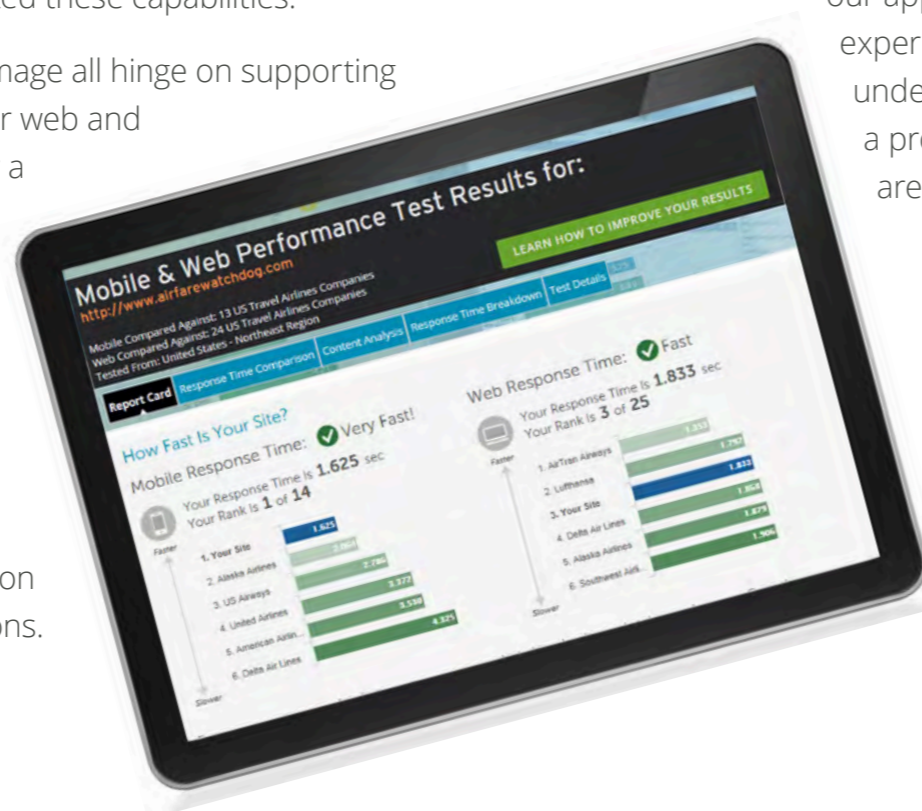
Performance is no longer a nice-to-have. Applications have shifted from an internal focus to corporate assets that are directly impacting the business more than ever. Revenue, loyalty and brand image have never been more dependent on how well our applications deliver exceptional performance and perfect user experiences. With Dynatrace you can optimize every digital moment, understand customer behavior, proactively pinpoint the root cause of a problem and resolve application performance issues — before users are impacted.

WANT TO KNOW HOW YOUR SITE COMPARES?

TRY OUR FREE PERFORMANCE TEST

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METHODOLOGY

2015 BEST OF THE WEB RANKINGS CALCULATIONS

In 2014, the Dynatrace Benchmarks methodology was updated to offer a more accurate comparison of user digital experience by measuring top companies across key digital channels. These updates included a new ranking system with an 'overall ranking' score which combines each benchmark participant's mobile, last mile, transaction and web scores where applicable across industries. The 2015 Best of the Web awards compared participants based on the performance of their entire digital experience delivered throughout 2014. Visit this link for details on Dynatrace Benchmarks methodology.

Based on a rigorous and well-defined set of online transactions and homepage measurements, Dynatrace Benchmarks competitively rank web and mobile web sites over specific periods of time and place. This collected data allows organizations to analyze the performance and best practices used by their competitors and fellow industry leaders. The information can be used to justify critical technology investments needed to drive high performing mobile and web environments.

Dynatrace publishes more than 300 global mobile and web benchmarks that include thousands of companies in more than 26 countries and millions of measurements each month, making them the most comprehensive source of industry-based mobile and web performance information.

Dynatrace benchmark metrics are based on Dynatrace Synthetic Monitoring, which measures websites' availability and response time for identified pages and transactions. Leveraging the largest and most comprehensive performance-testing network in the world, Dynatrace's integrated platform makes it easy to monitor the web and mobile web user experience performance from major backbone sites and real consumer PC's around the globe.

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ADDITIONAL RESOURCES:

For a replay of the 2015 Best of the Web Webinar visit here

For more information on Dynatrace visit: dynatrace.com

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