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The Customer Experience Index, 2010

by Bruce D. Temkin
for Customer Experience Professionals



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Consumers Rate The Customer Experience Across 133 Large US Firms

by **Bruce D. Temkin**

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EXECUTIVE SUMMARY

Forrester asked more than 4,600 US consumers about their interactions with a variety of companies, gauging the usefulness, ease of use, and enjoyability of those experiences. Based on these consumer responses, we calculated the Customer Experience Index (CxPi) for 133 firms in 14 different industries. Barnes & Noble, Marriott Hotels & Resorts, and Hampton Inn/Suites topped the rankings, while Charter Communications took the bottom spot for the third year in a row. Only 13 of the firms wound up with “excellent” ratings — and 45 were “poor” or “very poor.” At an industry level, retailers, hotels, and parcel shipping firms ended in the top spots for all categories, while health insurance plans, TV service providers, and Internet service providers ended up at the bottom. Led by Liberty Mutual Insurance, Comfort Inn, Sprint, and Time Warner Cable, 22 companies made significant improvements over last year’s results. There’s a lot of opportunity for companies to drive better business results by improving their customer experience management efforts. How? By charting a course toward Experience-Based Differentiation (EBD).

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As part of an online survey in Q4 2009, Forrester asked 4,653 US consumers about their interactions with airlines, banks, credit card providers, health insurance plans, hotels, insurance providers, Internet service providers, investment firms, parcel shipping firms, PC manufacturers, retailers, TV service providers, utility providers, and wireless service providers.

Related Research Documents

[“Customer Experience Boosts Revenue”](#)
June 22, 2009

[“The Customer Experience Index, 2008”](#)
December 12, 2008

[“The Customer Experience Journey”](#)
September 17, 2008

[“The Customer Experience Index, 2007”](#)
November 21, 2007



BARNES & NOBLE IS ON TOP AGAIN IN FORRESTER'S CUSTOMER EXPERIENCE INDEX

Executives tell us that customer experience is critical to their competitiveness. That makes sense because our research shows that good customer experience correlates with customer loyalty. But how effective are their firms at delivering good customer experiences? To answer this question, we created Forrester's third annual Customer Experience Index. Calculating the CxPi required the following steps:

- **We asked consumers to identify companies they do business with . . .** Consumers selected companies they work with in 14 different industries (see Figure 1). In all, we collected data on 216 different North American organizations, but we limited our rankings to the firms for which we had at least 100 responses.
- **. . . and answer three questions about each organization . . .** Customers want their interactions with companies to be useful, easy, and enjoyable. To gauge these dimensions, we asked consumers three questions about the firms they work with (see Figure 2).
- **. . . which let us calculate a Customer Experience Index for 133 firms.** To calculate each firm's CxPi, we subtracted the percentage of its customers who reported a bad experience from the percentage who reported a good experience — for all three questions. The overall CxPi is an average of those three results.

Barnes & Noble, Marriott Hotels & Resorts, And Hampton Inn/Suites Top The 2010 CxPi

Barnes & Noble, the top performer in last year's CxPi, took the top spot in Forrester's 2010 CxPi rankings — coming in slightly ahead of Marriott Hotels & Resorts and Hampton Inn/Suites (see Figure 3).¹ At the other end of the spectrum, Charter Communications landed at the bottom of the rankings for the third consecutive year. Here are some additional insights about the overall results:

- **Retailers take 12 out of the top 20 spots.** Most of the top-rated companies on the list are retailers. Hotels also grabbed three of the top 20 spots. Interestingly, three financial services firms also cracked the top 20: a credit union, SunTrust Bank, and The Vanguard Group.
- **Health insurance plans and Internet and TV service providers dominate the bottom.** The bottom 11 companies on the list came from only four industries: five health insurance plans (United Healthcare, Medicaid, Anthem, Aetna, and CIGNA), three Internet service providers (Charter Communications, Comcast, and Qwest Communications), two TV service providers (Charter Communications and Comcast), and one credit card provider (HSBC).
- **There was very little excellence.** Only 13 firms ended up with an “excellent” rating, and 35 received a “good” rating (see Figure 4). Forty companies fell in the middle with “okay” ratings (see Figure 5). At the bottom of the list, 45 received either a “poor” or “very poor” rating (see Figure 6).

- **Liberty Mutual Insurance improved the most.** When we compared firms' 2010 CxPi with last year's results, we found that 22 companies had improved by at least five percentage points (see Figure 7-1).² Led by Liberty Mutual Insurance's 15-percentage-point increase, five firms even had double-digit improvements (including Comfort Inn, Sprint, Time Warner Cable, and SunTrust Bank).
- **Wells Fargo declined the most.** Led by a 21-point decline in Wells Fargo's credit card business, eight companies ended up with 2010 CxPi scores that were at least 10 percentage points lower than in 2008 (see Figure 7-2). In that group of double-digit decliners are two credit card providers, three banks, and two Internet service providers.

Figure 1 Consumers Rated The Experience Of 133 Firms Across 14 Industries

Airlines	American Airlines Continental Airlines Delta Air Lines	JetBlue Airways Northwest Airlines Southwest Airlines	United Airlines/Ted US Airways/America West
Banks	A credit union Bank of America Capital One/North Fork Bank Citibank Citizens Bank	Fifth Third Bank JP Morgan Chase National City SunTrust Bank U.S. Bancorp	Wachovia Bank Washington Mutual Wells Fargo
Credit card providers	American Express Bank of America (incl. MBNA) Capital One Chase	Citigroup (e.g., Citibank) Discover Bank HSBC (incl. Orchard Bank)	MasterCard Visa Wells Fargo
Health insurance plans	Aetna Anthem (Blue Cross Blue Shield) Blue Shield of California	CIGNA Humana Kaiser	Medicaid Medicare United Healthcare
Hotels	Comfort Inn Courtyard by Marriott Hampton Inn/Suites	Hilton Hotels Holiday Inn	Holiday Inn Express Marriott Hotels & Resorts
Insurance providers	AAA Allstate Insurance American Family Insurance An independent insurance agent Farmers Insurance Group	Geico Liberty Mutual Insurance MetLife Nationwide Mutual Insurance Progressive	State Farm The Hartford Travelers USAA
Internet service providers	AOL (America Online) AT&T Cablevision Charter Communications	Comcast Cox Communications Qwest Communications	Road Runner (Time Warner Cable) Verizon
Investment firms	A credit union Charles Schwab Edward Jones	Fidelity Investments ING Direct Merrill Lynch	Morgan Stanley Smith Barney Other full-service brokerage The Vanguard Group
Parcel delivery/shipping firms	FedEx	United Parcel Service	United States Postal Service

Figure 1 Consumers Rated The Experience Of 133 Firms Across 14 Industries (Cont.)

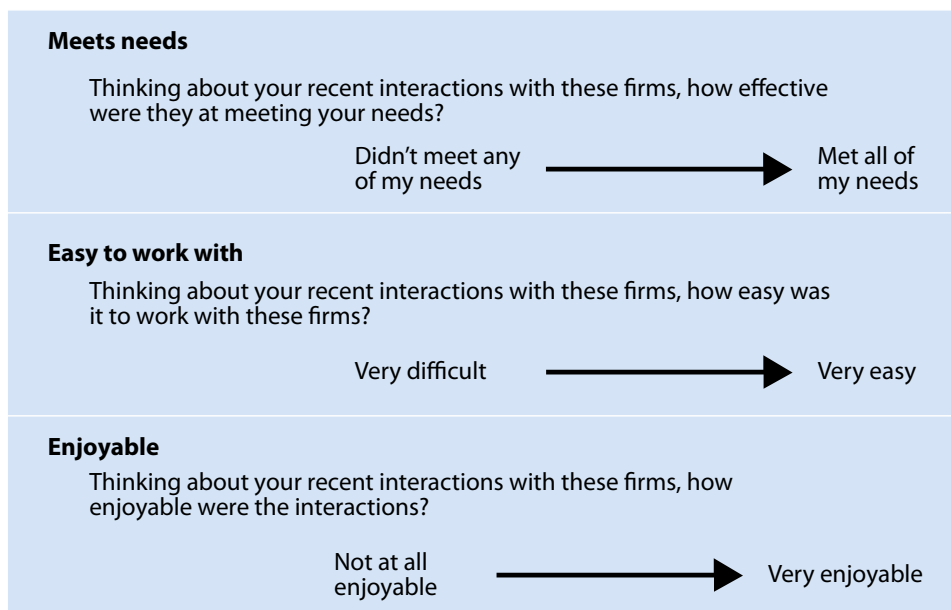
PC manufacturers	Acer Apple	Compaq Dell	Hewlett-Packard Toshiba
Retailers	Amazon.com Apple iTunes Barnes & Noble Best Buy BJ's Wholesale Club Borders Costco Wholesale CVS eBay	The Home Depot JCPenney Kmart Kohl's Lowe's Macy's Marshalls Office Depot	Old Navy Sam's Club Sears Staples Target Toys "R" Us Walgreens Wal-Mart
TV service providers	AT&T Charter Communications Comcast	Cox Communications DirecTV DISH Network (EchoStar)	Other cable TV provider Time Warner Cable
Utility providers	AEP (American Electric Power) ComEd (Commonwealth Edison Company)	Duke Energy FPL (Florida Power & Light Company)	National Grid PG&E (Pacific Gas and Electric Company)
Wireless service providers	Alltel AT&T	Sprint T-Mobile	TracFone Wireless Verizon Wireless

Source: North American Technographics® Customer Experience Online Survey, Q4 2009 (US)

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Source: Forrester Research, Inc.

Figure 2 Three Questions Drive The Customer Experience Index



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Source: Forrester Research, Inc.

Figure 3 Forrester's 2010 Customer Experience Index Rankings

1. Barnes & Noble (retailer)	66. Holiday Inn (hotel)*
2. Marriott Hotels & Resorts (hotel)	66. ComEd (utility provider)*
3. Hampton Inn/Suites (hotel)	66. Discover Bank (credit card provider)*
4. Amazon.com (retailer)*	66. National City (bank)*
4. Holiday Inn Express (hotel)*	71. Allstate Insurance (insurance provider)*
6. Kohl's (retailer)	71. Merrill Lynch (investment firm)*
7. JCPenney (retailer)*	71. Toshiba (PC manufacturer)*
7. Macy's (retailer)*	71. Cablevision (Internet service provider)*
7. A credit union (bank)*	75. TracFone Wireless (wireless service provider)*
7. BJ's Wholesale Club (retailer)*	75. MetLife (insurance provider)*
7. Comfort Inn (hotel)*	75. Kaiser (health insurance plan)*
7. Costco Wholesale (retailer)*	75. Travelers (insurance provider)*
7. Hilton Hotels (hotel)*	79. T-Mobile (wireless service provider)*
14. eBay (retailer)*	79. AT&T (TV service provider)*
14. Target (retailer)*	79. DirecTV (TV service provider)*
14. Lowe's (retailer)*	79. Verizon Wireless (wireless service provider)*
14. SunTrust Bank (bank)*	79. Delta Air Lines (airline)*
18. Borders (retailer)*	79. Acer (PC manufacturer)*
18. Sam's Club (retailer)*	85. United Airlines/Ted (airline)*
18. The Vanguard Group (investment firm)*	85. Humana (health insurance plan)*
21. USAA (insurance provider)*	85. AT&T (wireless service provider)*
21. Walgreens (retailer)*	85. Alltel (wireless service provider)*
21. Best Buy (retailer)*	89. PG&E (utility provider)*
24. The Home Depot (retailer)*	89. Compaq (PC manufacturer)*
24. CVS (retailer)*	89. Citizens Bank (bank)*
24. Sears (retailer)*	92. Nationwide Mutual Insurance (insurance provider)*
27. FedEx (parcel delivery/shipping firm)*	92. AT&T (Internet service provider)*
27. Southwest Airlines (airline)*	92. National Grid (utility provider)*
29. Liberty Mutual Insurance (insurance provider)*	95. Road Runner (Time Warner Cable) (Internet service provider)*
29. ING Direct (investment firm)*	95. Cox Communications (TV service provider)*
29. Toys "R" Us (retailer)*	97. AOL (America Online) (Internet service provider)*
29. Old Navy (retailer)*	97. Dell (PC manufacturer)*
29. Fifth Third Bank (bank)*	97. Verizon (Internet service provider)*
29. United Parcel Service (parcel delivery/shipping firm)*	97. Duke Energy (utility provider)*
35. JetBlue Airways (airline)*	97. American Airlines (airline)*
35. United States Postal Service (parcel delivery/shipping firm)*	102. Sprint (wireless service provider)*
35. American Express (credit card provider)*	102. Medicare (health insurance plan)*
35. Apple (PC manufacturer)*	104. Wells Fargo (bank)
35. Other full-service brokerage (investment firm)*	105. Chase (credit card provider)
40. Kmart (retailer)*	106. Citibank (bank)*
40. Charles Schwab (investment firm)*	106. AEP (utility provider)*
42. Wal-Mart (retailer)*	106. Capital One (credit card provider)*
42. Progressive (insurance provider)*	106. Bank of America (credit card provider)*
42. The Hartford (insurance provider)*	106. Cox Communications (Internet service provider)*
42. U.S. Bancorp (bank)*	106. JP Morgan Chase (bank)*
46. Apple iTunes (retailer)*	112. DISH Network (EchoStar) (TV service provider)
46. Courtyard by Marriott (hotel)*	113. Capital One/North Fork Bank (bank)*
46. Staples (retailer)*	113. Time Warner Cable (TV service provider)*
49. Morgan Stanley Smith Barney (investment firm)*	113. Other cable TV provider (TV service provider)*
49. Visa (credit card provider)*	113. Northwest Airlines (airline)*
49. State Farm (insurance provider)*	117. Bank of America (bank)
49. Edward Jones (investment firm)*	118. Wells Fargo (credit card provider)
53. Office Depot (retailer)*	119. Blue Shield of California (health insurance plan)*
53. A credit union (investment firm)*	119. Washington Mutual (bank)*
53. Continental Airlines (airline)*	121. US Airways/America West (airline)*
	121. Citigroup (e.g., Citibank) (credit card provider)*

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Source: Forrester Research, Inc.

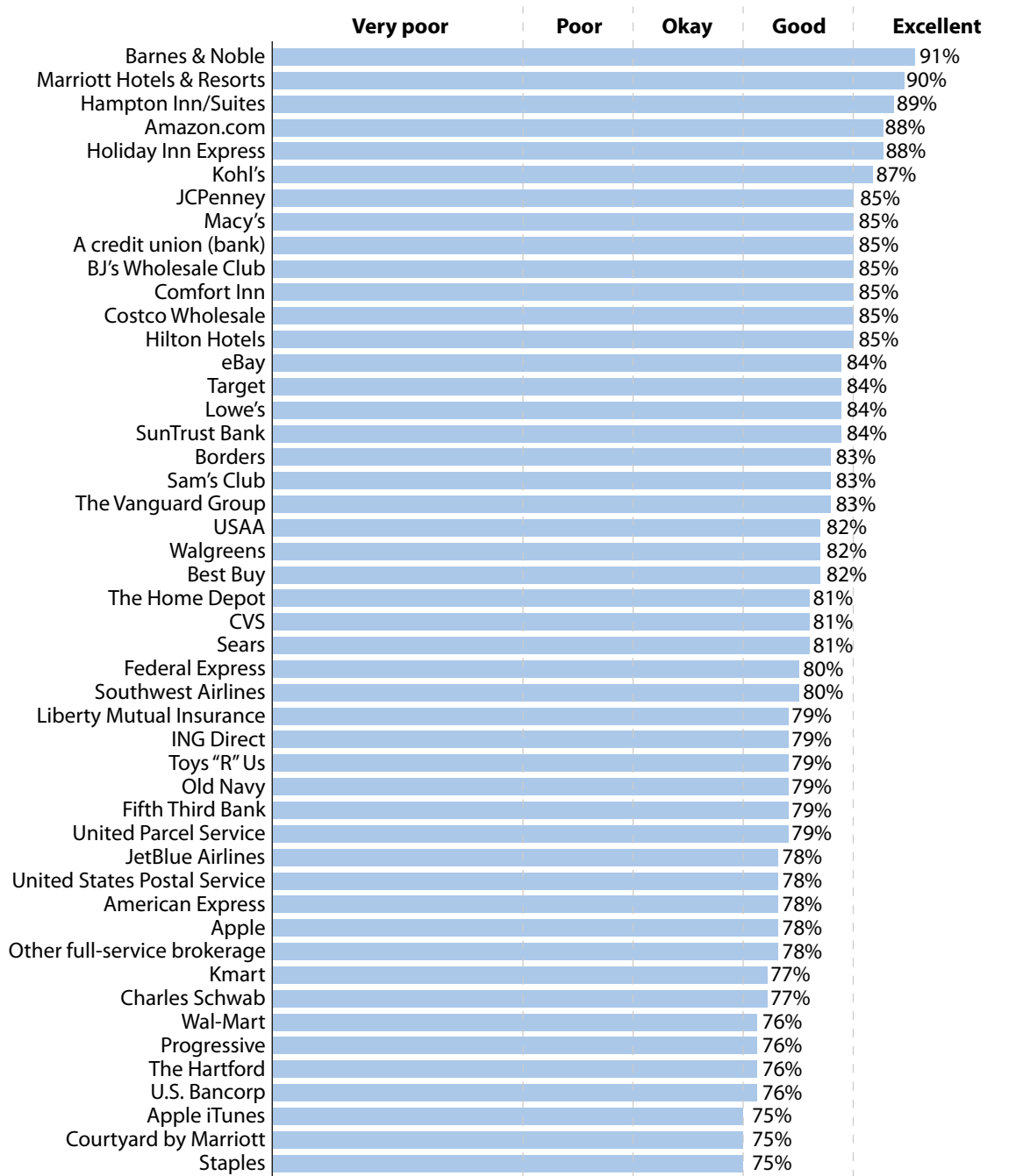
Figure 3 Forrester's 2010 Customer Experience Index Rankings (Cont.)

53. Marshalls (retailer)*	123. Qwest Communications (Internet service provider)*
57. AAA (insurance provider)*	123. CIGNA (health insurance plan)*
57. Farmers Insurance Group (insurance provider)*	125. Comcast (TV service provider)
57. MasterCard (credit card provider)*	126. Aetna (health insurance plan)*
57. Geico (insurance provider)*	126. Comcast (Internet service provider)*
57. American Family Insurance (insurance provider)*	128. HSBC (credit card provider)
62. Hewlett-Packard (PC manufacturer)	129. Anthem (BCBS) (health insurance plan)
63. Fidelity Investments (investment firm)*	130. Medicaid (health insurance plan)
63. Wachovia Bank (bank)*	131. United Healthcare (health insurance plan)
63. An independent insurance agent (insurance provider)*	132. Charter Communications (TV service provider)
66. FPL (utility provider)*	133. Charter Communications (Internet service provider)

Source: North American Technographics® Customer Experience Online Survey, Q4 2009 (US)

*Note: These companies have the same CxPi as other firms and are therefore tied in the rankings.

Figure 4 Companies With “Excellent” and “Good” CxPi Ratings



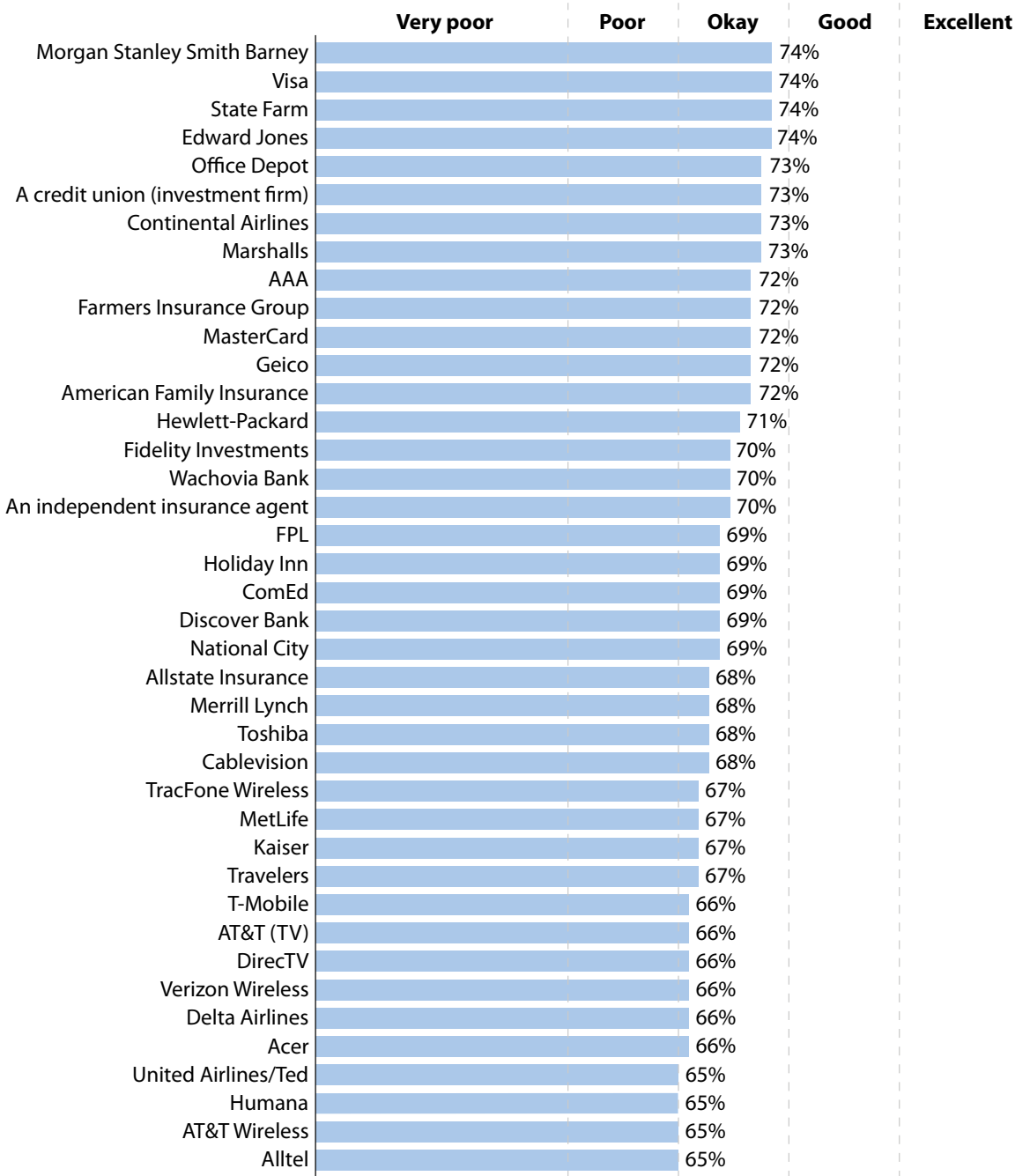
Base: US online consumers who have interacted with each firm
(numbers have been rounded)

Source: North American Technographics® Customer Experience Online Survey, Q4 2009 (US)

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Source: Forrester Research, Inc.

Figure 5 Companies With “Okay” CxPi Ratings



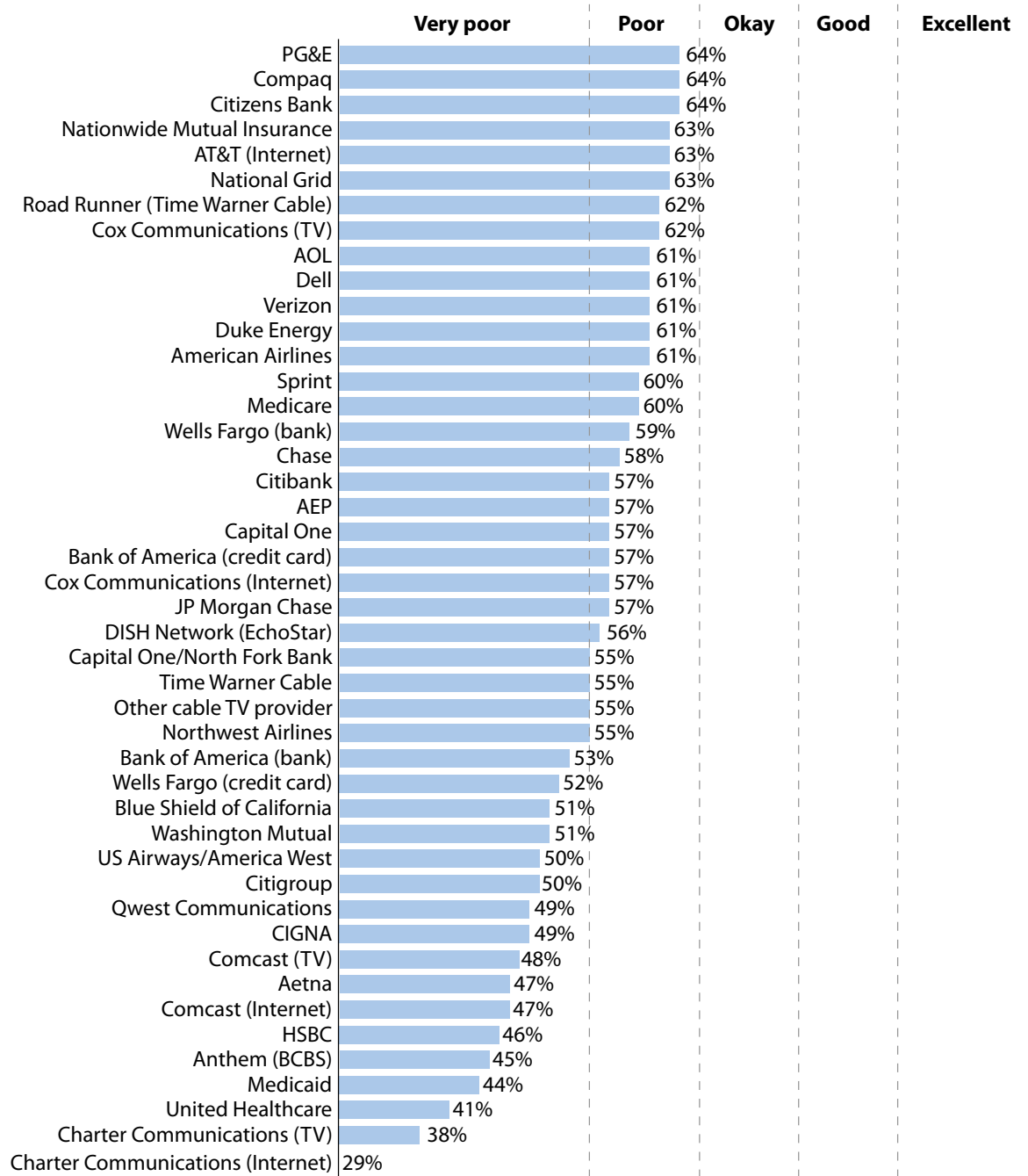
Base: US online consumers who have interacted with each firm
 (numbers have been rounded)

Source: North American Technographics® Customer Experience Online Survey, Q4 2009 (US)

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Source: Forrester Research, Inc.

Figure 6 Companies With “Poor” And “Very Poor” CxPi Ratings



Base: US online consumers who have interacted with each firm
(numbers have been rounded)

Source: North American Technographics® Customer Experience Online Survey, Q4 2009 (US)

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Source: Forrester Research, Inc.

Figure 7 Companies With Large Changes In CxPi Between 2008 And 2010**7-1 Companies with CxPi increases of five or more percentage points**

	2010 CxPi	2008 CxPi	Change from 2008 to 2010 (percentage points)
Liberty Mutual Insurance (insurance provider)	79%	64%	15
Comfort Inn (hotel)	85%	70%	15
Sprint (wireless service provider)	60%	45%	15
Time Warner Cable (TV service provider)	55%	41%	14
SunTrust Bank (bank)	84%	73%	11
Continental Airlines (airline)	73%	64%	9
Road Runner (Time Warner Cable) (Internet service provider)	62%	54%	8
Other full-service brokerage (investment firm)	78%	70%	8
United Airlines/Ted (airline)	65%	58%	7
Delta Air Lines (airline)	66%	59%	7
Best Buy (retailer)	82%	75%	7
Charles Schwab (investment firm)	77%	70%	7
Hewlett-Packard (PC manufacturer)	71%	64%	7
Hilton Hotels (hotel)	85%	78%	7
Wachovia Bank (bank)	70%	64%	6
Farmers Insurance Group (insurance provider)	72%	66%	6
Merrill Lynch (investment firm)	68%	62%	6
Comcast (TV service provider)	48%	42%	6
Medicaid (health insurance plan)	44%	38%	6
The Vanguard Group (investment firm)	83%	77%	6
Marriott Hotels & Resorts (hotel)	90%	85%	5
AAA (insurance provider)	72%	67%	5

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Source: Forrester Research, Inc.

Figure 7 Companies With Large Changes In CxPi Between 2008 And 2010 (Cont.)

7-2	Companies with CxPi decreases of five or more percentage points	2010 CxPi	2008 CxPi	Change from 2008 to 2010 (percentage points)
	Wells Fargo (credit card provider)	52%	73%	-21
	Citigroup (credit card provider)	50%	66%	-16
	Qwest Communications (Internet service provider)	49%	64%	-15
	Bank of America (bank)	53%	67%	-14
	Holiday Inn (hotel)	69%	82%	-13
	Washington Mutual (bank)	51%	63%	-12
	Wells Fargo (bank)	59%	70%	-11
	AOL (Internet service provider)	61%	71%	-10
	Anthem (BCBS) (health insurance plan)	45%	54%	-9
	Capital One (credit card provider)	57%	66%	-9
	Nationwide Mutual Insurance (insurance provider)	63%	72%	-9
	AT&T (Internet service provider)	63%	71%	-8
	Other cable TV provider (TV service provider)	55%	63%	-8
	HSBC (credit card provider)	46%	54%	-8
	United Healthcare (health insurance plan)	41%	49%	-8
	Capital One/North Fork Bank (bank)	55%	63%	-8
	Alltel (wireless service provider)	65%	72%	-7
	Chase (credit card provider)	58%	65%	-7
	National City (bank)	69%	75%	-6
	Bank of America (credit card provider)	57%	63%	-6
	Citibank (bank)	57%	63%	-6
	Staples (retailer)	74%	80%	-6
	Discover Bank (credit card provider)	69%	75%	-6
	Borders (retailer)	83%	88%	-5
	Toys "R" Us (retailer)	79%	84%	-5
	Old Navy (retailer)	79%	84%	-5
	Allstate Insurance (insurance provider)	68%	73%	-5
	An independent insurance agent (insurance provider)	70%	74%	-4
	JP Morgan Chase (bank)	57%	61%	-4

Base: US online consumers who have interacted with each firm
(numbers have been rounded)

Source: North American Technographics® Customer Experience Online Survey, Q4 2009 (US)

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Source: Forrester Research, Inc.

The Leaders In Meeting Needs, Being Easy To Work With, And Enjoyability

Examining company scores in each of the three underlying criteria — *meets needs*, *easy to work with*, and *enjoyability* — yielded additional insights. Here's what we found:

- **Holiday Inn Express, Barnes & Noble, and Marriott Hotels & Resorts lead in *meeting needs*.** Led by Holiday Inn Express, 28 firms received “excellent” ratings in the *meeting needs* component of our index (see Figure 8). Only four organizations received “very poor” ratings in this area: Charter Communications, Washington Mutual, Medicaid, and HSBC.
- **Hampton Inn/Suites and Holiday Inn Express lead in being *easy to work with*.** A total of 29 firms received “excellent” ratings for being *easy to work with* (see Figure 9). At the top of the list were 11 firms with ratings of at least 90%, led by Hampton Inn/Suites and Holiday Inn Express. On the other end of the spectrum, nine organizations ended up with “very poor” ratings, with Charter Communications falling well below all other firms.
- **Barnes & Noble and Marriott Hotels & Resorts top *enjoyability*.** On average, firms scored significantly lower on enjoyability than they did on *meeting needs* and being *easy to work with* (see Figure 10). Only Barnes & Noble and Marriott Hotels & Resorts received “excellent” ratings, and only 18 firms received “good” ratings. Most firms ended up with “poor” or “very poor” ratings in this area. Four organizations even fell below a horrid 30% rating: Charter Communications, Anthem, United Healthcare, and HSBC.

Figure 8 Customer Experience Index: “Meets Needs” Ratings

Companies with “excellent” ratings		Companies with “good” ratings	
Company	“Meets needs” index	Company	“Meets needs” index
Holiday Inn Express (hotel)	93%	American Family Insurance (insurance provider)	84%
Barnes & Noble (retailer)	92%	The Home Depot (retailer)	84%
Marriott Hotels & Resorts (hotel)	92%	United Parcel Service (parcel delivery/shipping firm)	84%
Hampton Inn/Suites (hotel)	91%	FedEx (parcel delivery/shipping firm)	83%
Amazon.com (retailer)	91%	Visa (credit card provider)	83%
The Vanguard Group (investment firm)	91%	Wal-Mart (retailer)	83%
A credit union (bank)	89%	Best Buy (retailer)	83%
Costco Wholesale (retailer)	88%	Southwest Airlines (airline)	82%
Kohl’s (retailer)	88%	U.S. Bancorp (bank)	82%
eBay (retailer)	87%	Hilton Hotels (hotel)	82%
Comfort Inn (hotel)	87%	Charles Schwab (investment firm)	81%
United States Postal Service (parcel delivery/shipping firm)	87%	Macy’s (retailer)	81%
Target (retailer)	87%	Progressive (insurance provider)	81%
Liberty Mutual Insurance (insurance provider)	87%	MasterCard (credit card provider)	81%
Walgreens (retailer)	87%	Borders (retailer)	81%
SunTrust Bank (bank)	87%	ComEd (utility provider)	81%
CVS (retailer)	87%	State Farm (insurance provider)	81%
Sam’s Club (retailer)	87%	Kmart (retailer)	81%
JCPenney (retailer)	87%	Apple iTunes (retailer)	80%
BJ’s Wholesale Club (retailer)	87%	Staples (retailer)	80%
USAA (insurance provider)	86%	Apple (PC manufacturer)	80%
Sears (retailer)	86%	TracFone Wireless (wireless service provider)	80%
ING Direct (investment firm)	86%	Morgan Stanley Smith Barney (investment firm)	79%
Other full-service brokerage (investment firm)	86%	Cablevision (Internet service provider)	79%
Lowe’s (retailer)	85%	An independent insurance agent (insurance provider)	79%
Fifth Third Bank (bank)	85%	Travelers (insurance provider)	79%
JetBlue Airways (airline)	85%	AAA (insurance provider)	79%
American Express (credit card provider)	85%	Office Depot (retailer)	79%
		FPL (utility provider)	79%
		Courtyard by Marriott (hotel)	78%
		Toys “R” Us (retailer)	78%
		Old Navy (retailer)	78%
		Discover Bank (credit card provider)	77%
		Duke Energy (utility provider)	77%
		MetLife (insurance provider)	77%
		Humana (health insurance plan)	77%
		Fidelity Investments (investment firm)	76%
		Edward Jones (investment firm)	76%
		Continental Airlines (airline)	76%

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Source: Forrester Research, Inc.

Figure 8 Customer Experience Index: “Meets Needs” Ratings (Cont.)

United Airlines/Ted (airline)	76%
The Hartford (insurance provider)	76%
Farmers Insurance Group (insurance provider)	76%
AT&T (TV service provider)	75%
Merrill Lynch (investment firm)	75%
Hewlett-Packard (PC manufacturer)	75%
Nationwide Mutual Insurance (insurance provider)	75%
Verizon Wireless (wireless service provider)	75%
Delta Air Lines (airline)	75%
National City (bank)	75%
PG&E (utility provider)	75%
Geico (insurance provider)	75%

Companies with “poor” ratings

Company	“Meets needs” index
Bank of America (credit card provider)	64%
Anthem (BCBS) (health insurance plan)	64%
Capital One (credit card provider)	62%
DISH Network (EchoStar) (TV service provider)	62%
Bank of America (bank)	61%
Other cable TV provider (TV service provider)	60%
US Airways/America West (airline)	60%
Comcast (Internet service provider)	59%
Northwest Airlines (airline)	59%
Comcast (TV service provider)	59%
Citigroup (credit card provider)	58%
Capital One/North Fork Bank (bank)	58%
Qwest Communications (Internet service provider)	57%
Aetna (health insurance plan)	57%
Wells Fargo (credit card provider)	56%
United Healthcare (health insurance plan)	55%
Blue Shield of California (health insurance plan)	55%

Companies with “very poor” ratings

Company	“Meets needs” index
HSBC (credit card provider)	53%
Medicaid (health insurance plan)	53%
Washington Mutual (bank)	52%
Charter Communications (TV service provider)	52%
Charter Communications (Internet service provider)	45%

CxPi ratings:

Excellent:	85%+
Good:	75% to 84%
Okay:	65% to 74%
Poor:	55% to 64%
Very poor:	<55%

Base: US online consumers who have interacted with each firm
(numbers have been rounded)

Source: North American Technographics® Customer Experience Online Survey, Q4 2009 (US)

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Source: Forrester Research, Inc.

Figure 9 Customer Experience Index: “Easy To Work With” Ratings

Companies with “excellent” ratings		Companies with “good” ratings	
Company	“Easy to work with” index	Company	“Easy to work with” index
Hampton Inn/Suites (hotel)	96%	Courtyard by Marriott (hotel)	84%
Holiday Inn Express (hotel)	95%	FedEx (parcel delivery/shipping firm)	84%
Barnes & Noble (retailer)	94%	Sears (retailer)	84%
BJ’s Wholesale Club (retailer)	93%	United Parcel Service (parcel delivery/shipping firm)	84%
Kohl’s (retailer)	93%	ING Direct (investment firm)	84%
Marriott Hotels & Resorts (hotel)	93%	United States Postal Service (parcel delivery/shipping firm)	83%
Amazon.com (retailer)	93%	Charles Schwab (investment firm)	83%
A credit union (bank)	91%	JetBlue Airways (airline)	83%
Costco Wholesale (retailer)	91%	Toys “R” Us (retailer)	82%
Borders (retailer)	90%	A credit union (investment firm)	82%
Macy’s (retailer)	90%	Kmart (retailer)	82%
Sam’s Club (retailer)	89%	The Hartford (insurance provider)	82%
Comfort Inn (hotel)	89%	State Farm (insurance provider)	82%
Target (retailer)	88%	Progressive (insurance provider)	82%
eBay (retailer)	88%	U.S. Bancorp (bank)	81%
Hilton Hotels (hotel)	88%	Geico (insurance provider)	81%
Lowe’s (retailer)	88%	Fifth Third Bank (bank)	81%
JCPenney (retailer)	88%	Wal-Mart (retailer)	81%
CVS (retailer)	87%	Continental Airlines (airline)	81%
The Home Depot (retailer)	87%	Other full-service brokerage (investment firm)	80%
Walgreens (retailer)	87%	Office Depot (retailer)	80%
Best Buy (retailer)	87%	Marshalls (retailer)	79%
SunTrust Bank (bank)	87%	MasterCard (credit card provider)	79%
USAA (insurance provider)	87%	Visa (credit card provider)	79%
The Vanguard Group (investment firm)	86%	Apple (PC manufacturer)	79%
Liberty Mutual Insurance (insurance provider)	86%	Staples (retailer)	78%
American Express (credit card provider)	85%	AAA (insurance provider)	78%
Southwest Airlines (airline)	85%	Morgan Stanley Smith Barney (investment firm)	77%
Old Navy (retailer)	85%	Wachovia Bank (bank)	77%
		Discover Bank (credit card provider)	77%
		Edward Jones (investment firm)	77%
		Fidelity Investments (investment firm)	77%
		Kaiser (health insurance plan)	76%
		Farmers Insurance Group (insurance provider)	75%
		Allstate Insurance (insurance provider)	75%

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Source: Forrester Research, Inc.

Figure 9 Customer Experience Index: “Easy To Work With” Ratings (Cont.)

Companies with “poor” ratings		Companies with “very poor” ratings	
Company	“Easy to work with” index	Company	“Easy to work with” index
Acer (PC manufacturer)	64%	Qwest Communications (Internet service provider)	53%
Bank of America (credit card provider)	64%	Comcast (TV service provider)	50%
Compaq (PC manufacturer)	62%	CIGNA (health insurance plan)	49%
American Airlines (airline)	62%	Comcast (Internet service provider)	47%
Dell (PC manufacturer)	62%	Aetna (health insurance plan)	47%
Other cable TV provider (TV service provider)	61%	Anthem (BCBS) (health insurance plan)	46%
Wells Fargo (credit card provider)	61%	Medicaid (health insurance plan)	44%
Northwest Airlines (airline)	61%	United Healthcare (health insurance plan)	40%
Verizon (Internet service provider)	61%	Charter Communications (TV service provider)	37%
JP Morgan Chase (bank)	61%	Charter Communications (Internet service provider)	26%
Medicare (health insurance plan)	61%		
DISH Network (EchoStar) (TV service provider)	61%		
US Airways/America West (airline)	59%		
AEP (utility provider)	58%		
Bank of America (bank)	58%		
Cox Communications (Internet service provider)	58%		
Citigroup (credit card provider)	57%		
HSBC (credit card provider)	57%		
Time Warner Cable (TV service provider)	56%		
Blue Shield of California (health insurance plan)	56%		
Washington Mutual (bank)	55%		

CxPi ratings:	
Excellent:	85%+
Good:	75% to 84%
Okay:	65% to 74%
Poor:	55% to 64%
Very poor:	<55%

Base: US online consumers who have interacted with each firm (numbers have been rounded)

Source: North American Technographics® Customer Experience Online Survey, Q4 2009 (US)

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Source: Forrester Research, Inc.

Figure 10 Customer Experience Index: “Enjoyability” Ratings

Companies with “excellent” ratings		Companies with “good” ratings	
Company	“Enjoyability” index	Company	“Enjoyability” index
Barnes & Noble (retailer)	86%	Hilton Hotels (hotel)	84%
Marriott Hotels & Resorts (hotel)	85%	Macy’s (retailer)	83%
		Amazon.com (retailer)	82%
		Kohl’s (retailer)	81%
		Hampton Inn/Suites (hotel)	81%
		JCPenney (retailer)	80%
		Comfort Inn (hotel)	79%
		Lowe’s (retailer)	78%
		Borders (retailer)	78%
		Toys “R” Us (retailer)	78%
		eBay (retailer)	78%
		Target (retailer)	77%
		SunTrust Bank (bank)	77%
		Best Buy (retailer)	76%
		Old Navy (retailer)	76%
		Costco Wholesale (retailer)	76%
		BJ’s Wholesale Club (retailer)	75%
		USAA (insurance provider)	75%

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Source: Forrester Research, Inc.

Figure 10 Customer Experience Index: “Enjoyability” Ratings (Cont.)

Companies with “poor” ratings		Companies with “very poor” ratings	
Company	“Enjoyability” index	Company	“Enjoyability” index
Hewlett-Packard (PC manufacturer)	64%	Alltel (wireless service provider)	53%
Progressive (insurance provider)	64%	MetLife (insurance provider)	53%
United States Postal Service (parcel delivery/ shipping firm)	64%	Kaiser (health insurance plan)	53%
Wal-Mart (retailer)	64%	DirectTV (TV service provider)	53%
American Express (credit card provider)	63%	Verizon Wireless (wireless service provider)	53%
A credit union (investment firm)	63%	Discover Bank (credit card provider)	53%
Courtyard by Marriott (hotel)	63%	Cablevision (Internet service provider)	52%
Merrill Lynch (investment firm)	63%	Humana (health insurance plan)	52%
U.S. Bancorp (bank)	63%	AT&T (TV service provider)	52%
Continental Airlines (airline)	62%	Delta Air Lines (airline)	52%
Acer (PC manufacturer)	62%	Citizens Bank (bank)	52%
Office Depot (retailer)	62%	Cox Communications (Internet service provider)	51%
Geico (insurance provider)	61%	AT&T (Internet service provider)	51%
Wachovia Bank (bank)	61%	American Airlines (airline)	51%
AAA (insurance provider)	60%	Verizon (Internet service provider)	51%
Compaq (PC manufacturer)	60%	AT&T (wireless service provider)	50%
Visa (credit card provider)	60%	AOL (Internet service provider)	50%
State Farm (insurance provider)	59%	Travelers (insurance provider)	49%
National City (bank)	58%	PG&E (utility provider)	49%
Fidelity Investments (investment firm)	58%	TracFone Wireless (wireless service provider)	48%
Toshiba (PC manufacturer)	57%	Sprint (wireless service provider)	48%
American Family Insurance (insurance provider)	57%	Road Runner (Time Warner Cable) (Internet service provider)	48%
ComEd (utility provider)	57%	Medicare (health insurance plan)	47%
An independent insurance agent (insurance provider)	56%	Nationwide Mutual Insurance (insurance provider)	47%
MasterCard (credit card provider)	56%	Wells Fargo (bank)	46%
Allstate Insurance (insurance provider)	56%	DISH Network (EchoStar) (TV service provider)	45%
T-Mobile (wireless service provider)	55%	Washington Mutual (bank)	45%
FPL (utility provider)	55%	National Grid (utility provider)	44%
Dell (PC manufacturer)	55%	Other cable TV provider (TV service provider)	44%
United Airlines/Ted (airline)	55%	JP Morgan Chase (bank)	43%
		Time Warner Cable (TV service provider)	43%
		Northwest Airlines (airline)	43%
		Capital One (credit card provider)	43%
		Bank of America (credit card provider)	42%
		AEP (utility provider)	42%
		Cox Communications (Internet service provider)	41%
		Chase (credit card provider)	41%
		Blue Shield of California (health insurance plan)	41%
		Duke Energy (utility provider)	40%

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Source: Forrester Research, Inc.

Figure 10 Customer Experience Index: “Enjoyability” Ratings (Cont.)

Citibank (bank)	40%
Capital One/North Fork Bank (bank)	40%
Bank of America (bank)	40%
Qwest Communications (Internet service provider)	38%
Aetna (health insurance plan)	38%
Wells Fargo (credit card provider)	37%
Comcast (TV service provider)	35%
Citigroup (credit card provider)	34%
Medicaid (health insurance plan)	34%
Comcast (Internet service provider)	33%
US Airways/America West (airline)	32%
CIGNA (health insurance plan)	30%
HSBC (credit card provider)	29%
United Healthcare (health insurance plan)	28%
Charter Communications (TV service provider)	25%
Anthem (BCBS) (health insurance plan)	25%
Charter Communications (Internet service provider)	15%

CxPi ratings:

Excellent:	85%+
Good:	75% to 84%
Okay:	65% to 74%
Poor:	55% to 64%
Very poor:	<55%

Base: US online consumers who have interacted with each firm
 (numbers have been rounded)

Source: North American Technographics® Customer Experience Online Survey, Q4 2009 (US)

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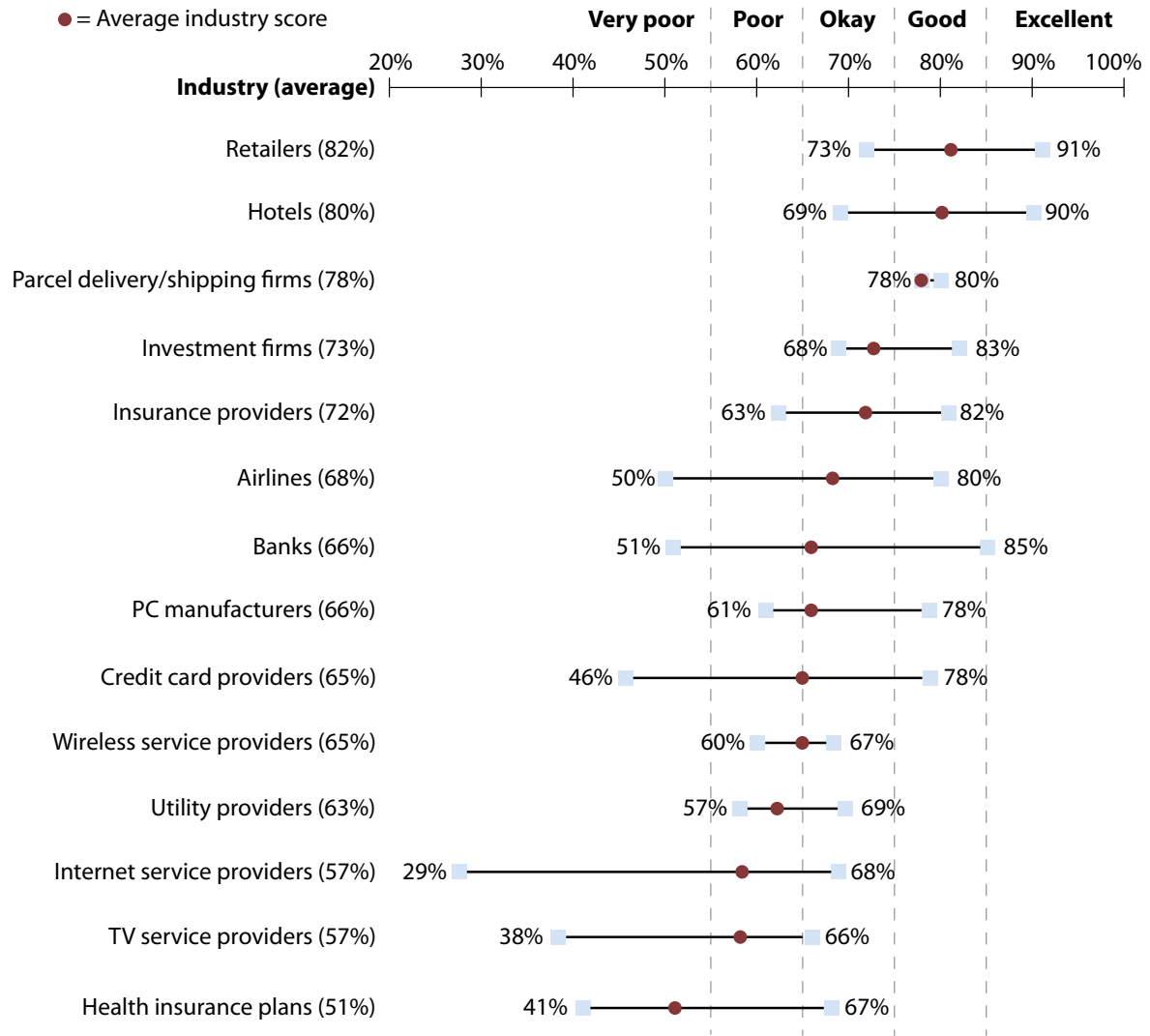
Source: Forrester Research, Inc.

RETAILERS, HOTELS, AND PARCEL SHIPPING FIRMS ARE THE TOP INDUSTRIES

There are clear differences in how firms rank on customer experience. But how do the different *industries* in our study compare with one another? We looked at the aggregate CxPi ratings for all 14 industries and found that:

- **Retailers, hotels, and parcel shipping firms lead the overall ratings.** Three industries at the top of the ratings — retailers (82%), hotels (80%), and parcel shipping firms (78%) — were the only industries to receive “good” average ratings (see Figure 11). Only health insurance plans (51%) ended up with a “very poor” average rating.
- **Retailers and Internet service providers are heading in opposite directions.** We examined the industry results over the last three years of CxPi results (see Figure 12). Of the nine industries that we’ve examined for all three years, two have been on steady paths. Retailers have improved every year, going from 78% in 2007 to 82% in 2010. Internet service providers, on the other hand, have dropped consistently from 62% in 2007 to 57% in 2010.
- **Retailers, hotels, and parcel shipping firms dominate all areas.** When we looked at the underlying components for the CxPi across industries, three industries were at the top of every area: retailers, hotels, and parcel shipping firms (see Figure 13-1). Retailers received the highest rating in being *easy to work with*, retailers and parcel shipping firms tied for the top in *meeting needs*, and hotels took the top spot for *enjoyability*. Three other industries took all of the bottom spots: health insurance plans, TV service providers, and Internet service providers.
- **TV service providers improved the most.** We also examined the changes from last year’s CxPi (see Figure 13-2). Led by a five-percentage-point gain by TV service providers, seven industries made improvements in their overall CxPi scores. Banks and credit card providers, on the other hand, had the largest declines.

Figure 11 Range Of Company CxPi Results Within 14 Industries



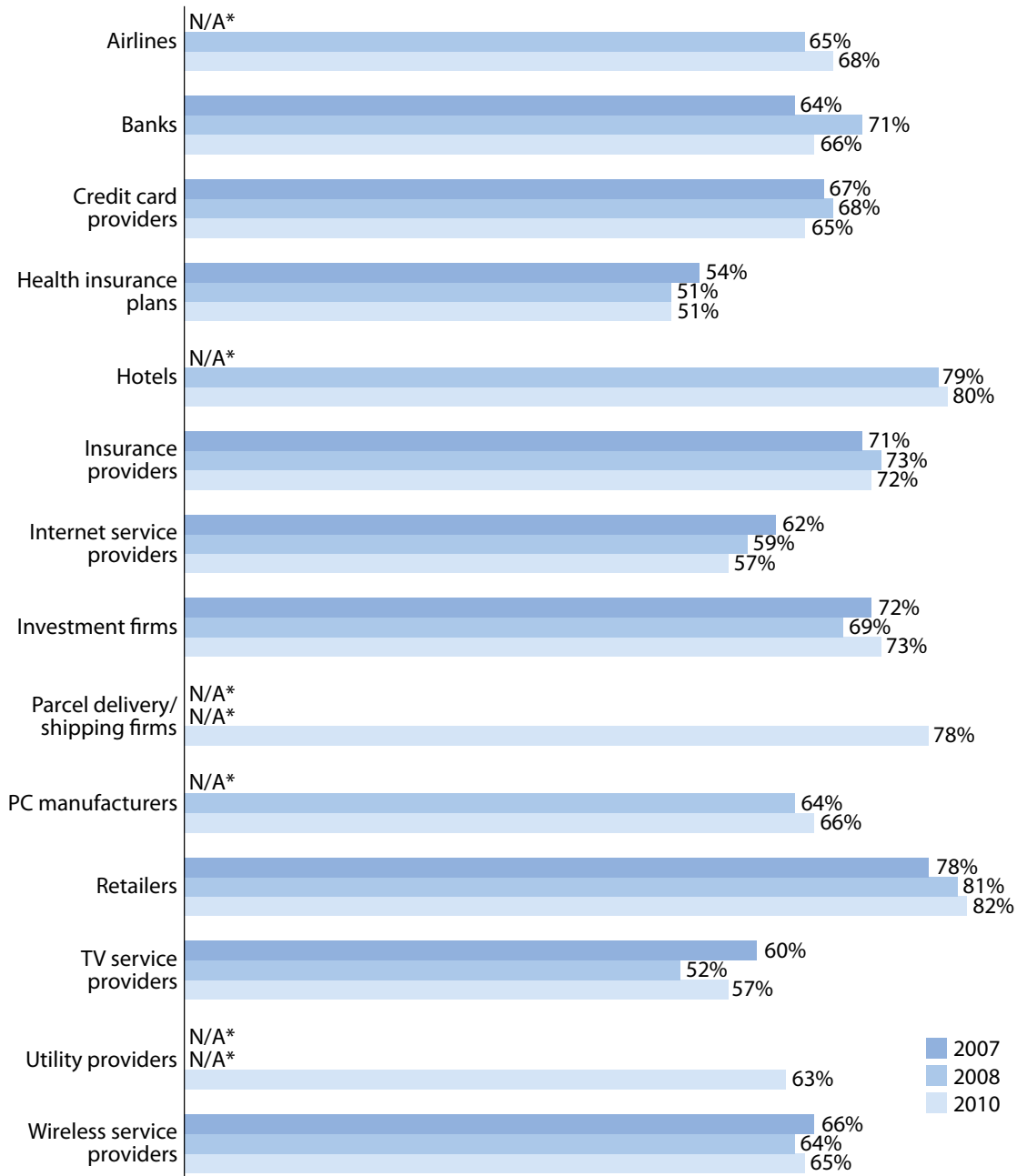
Base: US online consumers who have interacted with firms in these industries
(numbers have been rounded)

Source: North American Technographics® Customer Experience Online Survey, Q4 2009 (US)

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Source: Forrester Research, Inc.

Figure 12 Industry CxPi Results Between 2007 And 2010



Base: US online consumers who have interacted with firms in these industries (numbers have been rounded)

Source: North American Technographics® Customer Experience Online Survey, Q4 2009 (US)

*New industries were added each year to the CxPi, so all of the industries are not available for each year.

Figure 13 Details Of Company CxPi Results Within 14 Industries

13-1 CxPi details for 2010

Industry	Easy to work with	Meets needs	Enjoyable	Total CxPi
Retailers	86%	85%	73%	82%
Hotels	84%	81%	74%	80%
Parcel delivery/shipping firms	83%	85%	67%	78%
Investment firms	78%	78%	62%	73%
Insurance providers	78%	79%	60%	72%
Airlines	72%	74%	57%	68%
Banks	71%	72%	53%	66%
PC manufacturers	66%	71%	59%	66%
Credit card providers	72%	73%	49%	65%
Wireless service providers	70%	72%	51%	65%
Utility providers	67%	75%	46%	63%
Internet service providers	59%	67%	44%	57%
TV service providers	60%	66%	44%	57%
Health insurance plans	52%	64%	38%	51%

13-2 Change in CxPi details between 2008 and 2010 (percentage points)

Industry	Easy to work with	Meets needs	Enjoyable	Total CxPi
TV service providers	5%	3%	5%	5%
Investment firms	2%	2%	6%	4%
Airlines	5%	0%	3%	3%
PC manufacturers	0%	0%	6%	2%
Hotels	1%	0%	2%	1%
Retailers	1%	-1%	2%	1%
Wireless service providers	2%	-2%	1%	1%
Health insurance plans	0%	-1%	1%	0%
Insurance providers	-1%	-2%	1%	-1%
Internet service providers	0%	-3%	-2%	-2%
Credit card providers	-2%	-4%	-4%	-3%
Banks	-6%	-5%	-6%	-5%
Parcel delivery/shipping firms*	N/A	N/A	N/A	N/A
Utility providers*	N/A	N/A	N/A	N/A

Base: US online consumers who have interacted with firms in these industries (numbers have been rounded)

Source: North American Technographics® Customer Experience Online Survey, Q4 2009 (US)

*These industries were added in 2010.

RECOMMENDATIONS

BUILD CUSTOMER EXPERIENCE DISCIPLINE IN 2010

The results are clear: Customer experience represents an enormous opportunity. Our research shows that most companies are still in the early stages of developing strong customer experience management skills.³ That's good news. Why? Because companies that improve their customer experience can drive significant business improvements through more loyal customers.⁴ To capture these returns, customer experience professionals should:

- **Look beyond your industry for best practices.** While there are some customer experience best practices in every industry, firms should look for best practices across all industries. As a start, take a look at the firms at the top of the CxPi rankings. And if you're in an industry that didn't do well in the CxPi — like health insurance plans, TV service providers, and Internet service providers — you should focus the search for best practices predominantly outside your industry. Otherwise you'll run the risk of *benchmark myopia*, the belief that delivering the same mediocre experience as your competitors is acceptable.
- **Build a robust voice of the customer program.** There's nothing more aligning in an organization than clear feedback from customers. But most organizations don't provide employees with that feedback in a consistent, usable form. That's why customer experience professionals should develop strong voice of the customer (VoC) programs.⁵ A number of technology vendors are changing the landscape in these programs, making it easier to do things like analyze unstructured data and share information more broadly.⁶ We've also identified 16 best practices to follow in areas like leadership, culture, and reacting to customer feedback.⁷
- **Make the business case for customer experience.** While Forrester's projections estimate the economic impact of customer experience across industries, companies need to develop their own models that more closely reflect their own businesses. To improve the chances of success for these efforts, make sure to focus on the content, organization, and style of the business case.⁸ Here are some other things to keep in mind: Get the CFO on board, define a key metric, analyze customer segments, and "sell" the results.⁹ As you use this business case to gain executive commitment, watch out for three types of responses: passive, willing, and engaged.¹⁰
- **Get to the next level of customer experience maturity.** Firms should develop a road map to what Forrester calls Experience-Based Differentiation, a blueprint for customer experience excellence.¹¹ To master EBD, firms will need to adopt three principles: 1) Obsess about customer needs; 2) reinforce brands with every interaction; and 3) treat customer experience as a competence. Getting to EBD requires a multiyear journey through five stages of maturity: interested, invested, committed, engaged, and embedded.¹² Companies should identify where they are on this journey and how they can get to the next stage.

SUPPLEMENTAL MATERIAL

Methodology

This analysis was based on responses from 4,653 US consumers during Forrester's North American Technographics® Customer Experience Online Survey, Q4 2009 (US). The survey was fielded during November 2009. The Customer Experience Index (CxPi) was calculated as an average of the indexes that came from consumer responses to the following three questions from an online survey:

1. Thinking about your recent interactions with these firms, how effective were they at meeting your needs? (This question drives the “meets needs” index.)
2. Thinking about your recent interactions with these firms, how easy was it to work with these firms? (This question drives the “ease of working with” index.)
3. Thinking about your recent interactions with these firms, how enjoyable were the interactions? (This question drives the “enjoyability” index.)

Consumers selected responses along a five-point scale — ranging from a very negative experience (1) to a very positive one (5). The individual indexes were calculated by taking the percentage of consumers who selected one of the top two boxes (4 or 5) and subtracting the percentage of consumers who selected one of the bottom two boxes (1 or 2).

In order to limit consumer feedback to organizations that consumers are familiar with, we only asked them about organizations in each industry that they've interacted the most with during the previous 90 days. Consumers were allowed to select an option saying that they had not interacted with any company in the industry.

While we received feedback on 216 North American firms, the CxPi only includes the 133 organizations that had at least 100 consumer responses.

Forrester's Consumer Data

Data for this analysis came from Forrester's North American Technographics® Customer Experience Online Survey, Q4 2009 (US). Forrester conducted an online survey fielded in October 2009 of 4,653 US individuals ages 18 to 88. For results based on a randomly chosen sample of this size (N = 4,653), there is 95% confidence that the results have a statistical precision of plus or minus 1.4% of what they would be if the entire population of US online individuals ages 18 and older had been surveyed. Forrester weighted the data by age, gender, income, broadband adoption, and region to demographically represent the adult US online population. The survey sample size, when weighted, was 4,623. (Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in online panels.) Please note that this was an online survey. Respondents who participate in online surveys have in general more experience with

the Internet and feel more comfortable transacting online. The data is weighted to be representative for the total online population on the weighting targets mentioned, but this sample bias may produce results that differ from Forrester's offline benchmark survey. The sample was drawn from members of MarketTools' online panel, and respondents were motivated by receiving points that could be redeemed for a reward. The sample provided by MarketTools is not a random sample. While individuals have been randomly sampled from MarketTools' panel for this particular survey, they have previously chosen to take part in the MarketTools online panel.

ENDNOTES

- ¹ This is the third annual customer experience ranking based on Forrester's Customer Experience Index (CxPi). In 2007, we calculated the CxPi for 112 firms in nine different industries. In 2008, we calculated the CxPi for 113 firms in 12 different industries. In the 2010 rankings, we calculated the CxPi for 133 companies and added two new industries: parcel delivery/shipping firms and utility providers.
- ² The previous CxPi was called the 2008 CxPi because it was published in December 2008. For the current CxPi, we decided to publish it in early 2010, so it is called the 2010 CxPi. Therefore, we will not publish a report called the 2009 CxPi. All three of the CxPi reports have been based on data collected during the last quarter of the year. See the December 12, 2008, "[The Customer Experience Index, 2008](#)" report.
- ³ When we examined responses to our Experience-Based Differentiation (EBD) self-test, it was clear that many organizations are pretty low on the customer experience maturity scale. That's why there are significant opportunities for improvement, especially when it comes to Web sites — 60% of which failed our evaluations in 2008. So where is customer experience today? In its adolescence. Customer experience management will need nurturing and patience over the next few formative years. See the April 24, 2009, "[The State Of Customer Experience, 2009](#)" report.
- ⁴ Forrester's previous research has shown a high correlation between customer experience and three key elements of loyal behavior: willingness to buy more, reluctance to switch, and likelihood to recommend. But how does that affect a company's bottom line? To answer that question, we looked at the percentage of loyal customers within the customer bases of more than 100 companies. It turns out that customer experience leaders have an advantage of more than 14% over customer experience laggards across all three areas of loyalty. A modest improvement in customer experience can total up to \$311 million in annual revenues for a \$10 billion business. See the June 22, 2009, "[Customer Experience Boosts Revenue](#)" report.
- ⁵ Many companies say that they don't have a good connection with customers. That's why firms should consider developing a systematic approach for incorporating the needs of customers into the design of customer experiences — what Forrester calls a voice of the customer (VoC) program. Successful VoC programs will incorporate listening, interpreting, responding, and monitoring. As customer experience professionals roll out VoC programs, they should be prepared to overcome internal organizational obstacles. See the February 8, 2007, "[Building Your Voice Of The Customer Program](#)" report.
- ⁶ Voice of the customer (VoC) programs are a critical component to improving customer experience. But today's efforts are broken in many ways. They lack action, get caught in silos, and aren't cost- or time-

effective. A number of trends are changing how companies implement their VoC programs, including analysis of unstructured and unsolicited data, inclusion of social media, and more continuous feedback. Companies should take advantage of these trends to dramatically improve their use of customer feedback. The result: better customer experiences and more loyal customers. See the February 26, 2009, [“Voice Of The Customer: The Next Generation.”](#)

- ⁷ To understand the best practices in voice of the customer (VoC) programs, Forrester analyzed the 40 applications it received for its Voice Of The Customer award. When we examined the advice that applicants listed for other companies, we found 16 recommendations that fell into the following five categories: leadership, culture and alignment, listening to customer feedback, interpreting customer feedback, and reacting to customer feedback. See the November 11, 2009, [“Sixteen Voice Of The Customer Recommendations”](#) report.
- ⁸ To help customer experience professionals deliver compelling business cases, Forrester has created the Business Case Review Checklist For Customer Experience Professionals. This checklist should be used by business case authors to validate that their work has the content executives are looking for, organizes that content so that it tells a powerful story, and presents the argument in a way that is both easy to consume and engaging for the audience. See the August 18, 2008, [“Bulletproof Your Business Case For Improving Customer Experience”](#) report.
- ⁹ Customer experience professionals need to make their business cases stand out from the crowd. This means crafting a compelling argument and delivering that argument in a way that grabs the attention of decision-makers. Customer experience professionals can deliver business case presentations that wow by following five best practices: telling stories, using the element of surprise, bringing numbers to life with meaningful analogies, framing benefits as losses avoided, and encouraging audience participation. See the May 1, 2009, [“Five Ways To Turn Business Case Presentations From Boring Into ‘Wow!’”](#) report.
- ¹⁰ To be successful, chief customer experience officers (CC/EOs) need a coalition of top executives who take an active role in transforming the organization. While most executives support the idea of customer centricity, many fail to act because they don’t understand the business value or don’t know how to help. To move executives from passive bystanders to active supporters, CC/EOs should identify top influencers, rate their current level of support, and craft a customized plan to bring each executive along. Through it all, CC/EOs should use their passion for customer experience to set the tone for the rest of the leadership team. See the October 23, 2009, [“How Chief Customer Experience Officers Gain Active Executive Support”](#) report.
- ¹¹ With more access to information, more sensitivity to price, and less sensitivity to advertising, customers are getting harder to win and keep. Organizations try to woo these empowered consumers with mediocre customer experiences — but it won’t work. Firms need to dramatically raise the bar on the customer experience they provide. How? By adopting what Forrester calls Experience-Based Differentiation (EBD): a systematic approach to interacting with customers that consistently builds loyalty. See the January 2, 2007, [“Experience-Based Differentiation”](#) report.

¹² Why is customer experience such a hot topic? Because it's important, complex, and broken. That's why firms should head toward Experience-Based Differentiation (EBD), a blueprint for customer experience excellence. But EBD can't be mastered overnight. Instead, companies must embark on a multiyear journey through five levels of EBD maturity: 1) interested; 2) invested; 3) committed; 4) engaged; and 5) embedded. Along the way, firms need to develop customer-centric DNA, a corporate culture with six components that include collective celebrations, commitment to employees, and consistent tradeoffs. To succeed in the transformation, firms must prepare for a multiyear journey and include their HR groups in the effort. See the September 17, 2008, "[The Customer Experience Journey](#)" report.

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