

Bowen **Craggs** & Co
INDEX OF ONLINE EXCELLENCE

2016

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MARKETING FOR THE WHOLE ENTERPRISE:

What you can learn from the world's best online communicators

The Bowen Craggs Index of Online Excellence is a unique guide to the best in internet corporate communications. It's not really about communications, it's about marketing – but marketing the whole enterprise, not just the things or services it sells. If you want people to work for you, to invest in you, to write nice things about you – and also to buy your stuff because they think well of you – group level marketing matters. And these days the great bulk of it is happening on the internet.

Yet if you look around the corporate world, relatively few companies act as though they believe this. Our ranking is a result of a thorough sifting of the 200 biggest companies by market cap to find the 30 best (see Methodology, p. 14). Looking at the 200, we see the biggest group – perhaps the majority – as being those for whom online comms is a necessary chore, to be done at the least cost. An élite – at the top of our Index – are those that have considered what they need, and done it well. But a depressingly large number are the ones in between: companies that have a vague idea of the importance of online comms, yet are not giving it the resources – or more importantly brain space – it needs.

A striking feature of our top 30 is the domination of European companies. There are no Asians and only a scattering of Americans towards the bottom. The lack of Asian firms appears to reflect a more general lack of interest in group communications – they often make good use of social media and apps (for example WeChat in China), but always to sell to or serve customers direct. Americans suffer from

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a variation on this. Their internet efforts are nearly always focused on selling stuff, though they can also be superb at attracting potential employees (Microsoft, Google and Goldman Sachs rule the world here). What they lack is the sense that this is all part of the same effort – whether you are ‘selling’ the company to customers, jobseekers, journalists, investors or whoever, you can use the same messaging. But only if you coordinate. Often American companies do not have a core web team, or at least one with any influence. Europeans usually do, and it shows in the effectiveness of their internet efforts.

‘What the best performers show is how to spend both money and time well.’

Lack of budget can be the problem, but wasted budget is a worse one. What the best performers show is how to spend both money and time well. Here are some of the lessons:

- **Don't make decisions based on fashion.** A modern look is important, but not at the expense of ease-of-use. The current trend for minimalism – hide the ugly bits like menus – can make sense in simple media or brand sites. But it makes very little on a complex corporate site, where visitors need to be able to move around without constant scrolling and clicking. It's not a coincidence that the top four companies in the table (Nestlé, Bayer, Eni, BP) have all hung on to ‘conventional’ navigation – we give a lot of weight to usability.

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- **Simplify.** Rio Tinto has abandoned its separate sites for annual and sustainability reports and rolled them into its main site – saves money and improves usability.
 - **Treat social media and websites as part of the same effort.** Most often company websites are run by corporate comms; social media by marketing. Companies are now seeing that this makes little sense – as marketing and comms blur, the same team should run both. The results are showing in more effective use of both.

First, companies are realizing that ‘social media’ is not one thing but many. YouTube and Flickr are not ‘social’ but are very useful (and cheap) complements to websites. Unilever now puts its investor webcasts on YouTube, and many companies keep their media image libraries on Flickr. The best ones, including Sanofi and Rio Tinto, counter Flickr’s appalling usability by providing routes right up to the point of download on their own sites.

Second, some companies are going on the offensive with Facebook. So long seen as a source of risk, it can also be used to fight back. While Unilever’s page still looks like a bulletin board for people who hate it, Nestlé and BP America are trying to convert their enemies one by one by replying to pretty much every hostile post. More subtly, some companies

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are using Facebook to cut across the fragmentation of their organizations, as reflected in the web estate. Total, the French oil giant, has many businesses in many markets, but only one Facebook page for each – including places like New Caledonia and the Dominican Republic. They are all carefully targeted and actively managed. Third, integration between LinkedIn and the web is improving – the problem for HR departments is that they could be rivals, but companies such as Barclays vigorously link between the two. Look beyond HR too – the Unilever LinkedIn page is used for reputation management, as well as saying what a lovely place Unilever is to work.

- **Serve mobile users but don't forget the big-screened majority.** When 'responsive' sites arrived, too often desktop and laptop users found their usability was degraded – little sense in this as even now 80 per cent of corporate site users are on big screens. That has much improved, though only a few – including Novartis and Sanofi – have also managed to keep a right column for related links. Most push them to the bottom, whatever the screen size. Unhelpful.

'Story has become an over-used word – what websites need is really engaging material, whatever its form.'

- **Get 'stories' right.** 'Story' has become an over-used word – what websites need is really engaging material, whatever its form. To do this, you need a professional editor – as any of your other publications would. GSK's 'Behind the science' is a model.

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- **Look at Nestlé's Ask Nestlé section.** It is a model of reputation management (See Lessons from the top three, p. 11).
 - **Consider how your corporate site can be used to sell stuff – but be careful.** The need to demonstrate return on investment is reflected in a shift to the 'conversion web'. Siemens has abandoned its subtle brand-building home page for more direct marketing messages. It is slickly done, but there is a risk in withdrawing messages around innovation and responsibility that might impress a broader audience. A balance must be kept.

'The need to demonstrate return on investment is reflected in a shift to the conversion web.'

- **Take corporate social responsibility seriously.** Until recently CSR was very much a European thing. Now Ford and EMC are showing how Americans can leapfrog, with standard-setting services. But be cautious about 'integrated' reporting – rolling financial and non-financial reporting together – because it can reduce the service to different professional (and typically impatient) audiences.

THE TOP 20

Figures in brackets = maximum scores ↑ Up from 2014 ↓ Down from 2014 * New entry to Index

Position		[280] Total score	Company	Total score 2014	Position 2014	[60] Construction	[48] Message	[12] Contact	[32] Serving society	[32] Serving investors	[32] Serving the media	[32] Serving jobseekers	[32] Serving customers
1	↑	216	Nestlé With its strong focus on dialogue and openness, Nestlé's is the best corporate online presence in the world at the moment	216	2	45	39	11	27	26	26	21	21
2	↑	211	Bayer A complex web estate that is remarkably well managed and transmits a real sense of excitement about the group	198	16	49	39	9	26	24	25	20	19
3	↓	209	Eni Host to a number of online innovations across the estate, including a bold step into modern storytelling with its new Eniday blog site	216	2	46	37	10	28	26	21	21	20
4	↑	208	BP A carefully relaunched corporate site resists temptations to follow fashion, with strong magazine content complemented by well-managed social media channels	207	8	47	37	7	26	27	20	21	23
= 5	↑	207	GlaxoSmithKline The online estate is helping to reintroduce GSK as a healthcare company by taking visitors 'Behind the science'	200	12	46	38	10	26	22	20	23	22
= 5	↑	207	Novo Nordisk The new responsive design and incremental improvements to content provision enhance an especially well-governed global online presence	199	14	48	37	10	23	18	23	25	23
= 5	↑	207	Roche New features are innovative, visually striking and mobile-friendly, but come at some cost to desktop usability	209	6	41	41	9	26	21	21	25	23
= 5	↓	207	Royal Dutch Shell An editorially rich and visually sumptuous web estate that as been relaunched with minimalist navigation that undermines usability	218	1	41	36	7	24	28	21	24	26
= 9	↑	206	BASF The relaunched, responsive template is modern and user-friendly; and all online channels are used effectively to 'sell' BASF to new visitors	200	12	41	37	8	23	24	22	26	25
= 9	*	206	AP Moller Maersk Storytelling content is the centrepiece of the online estate, and serves as an inspiring advertisement for Maersk as an employer	n/a	n/a	39	43	9	23	23	20	26	23

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11 ↓	205	Siemens A sophisticated and unconventional online presence, though the corporate website is showing signs of tiredness	212	5	37	38	10	22	24	27	24	23
= 12 ↓	203	British American Tobacco Confident, well-coordinated use of online channels to tackle contentious issues head on	208	7	44	35	9	27	26	19	22	21
= 12 ↑	203	L'Oréal Technically advanced and often visually stunning, with good use of shared content across the estate and strong social channels	197	16	40	40	7	25	24	20	25	22
= 14 ↓	202	SABMiller An online presence that uses bold magazine effects and un-corporate design elements to immerse visitors in the world of beer	201	10	44	40	9	27	24	20	17	21
= 14 ↓	202	Unilever Unilever offers bold if imperfect journeys into 'Sustainable Living' and attempts to expand the definition of corporate responsibility	213	4	43	39	8	23	25	17	22	25
16 *	200	ING Thoroughly contemporary and minimalist, the lightly redesigned site is experimenting with ways to best promote a steady stream of high-quality editorial across online channels	n/a	n/a	40	36	10	24	25	22	21	22
17 ↑	199	Total A new site that works well, thanks to the retention of conventional navigation, and presents the company well as a socially and environmentally responsible alternative to its peers	183	39	44	38	8	26	26	18	23	16
= 18 *	197	EMC Customer areas really shine, corporate areas less so, but the provision of sustainability data is among the best in the world	n/a	n/a	38	35	11	26	20	21	22	24
= 18 ↓	197	SAP Disjointed navigation across the online estate is offset by a number of innovations worth emulating	203	9	36	40	7	24	24	22	22	22
20 *	196	Ford A rich and good looking corporate site with an exceptional sustainability report, but let down by tricky navigation	n/a	n/a	37	36	7	26	22	24	20	24

THE NEXT 10

=21 Google (195)

A disjointed online presence that provides an excellent service for jobseekers and makes creative use of social media channels

=21 Nordea (195)

A somewhat bland but efficient site serves jobseekers and professional audiences well

=21 Rio Tinto (195)

A site that has been simplified and, by failing to update its navigation, has become more effective than its fashionable peers

=24 IBM (193)

The US site has been redesigned with benefits mainly for customers, but content selling the company to jobseekers is also strong

=24 Microsoft (193)

Crisp visual design, engaging jobseeker information and compelling responsibility-boosting material are let down by chronic – at times downright crazy – fragmentation

=26 Barclays (192)

A responsive design works well on mobile, not as well on the desktop; the magazine-style home page sends a strong message of a forward-looking bank trying to shed its past image

=26 Daimler (192)

A slick new site is let down by poor usability, while the class-leading media site is suffering from a lack of mobile preparedness

=28 Coca-Cola (191)

The intriguing magazine approach taken by Coca-Cola with its 'Journey' is now available in many national versions, though on some there are signs of a shift to a more conventional corporate approach

=28 Goldman Sachs (191)

A dogged – and successful – focus on using online channels to attract the brightest and best graduate recruits, undermined by poor global website navigation

30 HSBC (190)

An online presence which is helping HSBC to position itself as the global thought leader in business and finance

LESSONS FROM THE TOP THREE

The top three scorers share one thing – navigation that lets visitors move around using in-view menus. Given inevitable pressures to follow fashion, their dogged insistence on putting usability first is impressive.

1

Nestlé is now out on its own, not because its score has gone up (it has stayed the same), but because some of last year's top scorers have dropped back. Shell and Unilever have relaunched and have stumbled in the process – this is common, but in both cases it was largely because of problems with navigation. The Siemens site has the opposite problem – it is getting old and is starting to have an uncared-for feeling.

Where Nestlé shines is in its Ask Nestlé reputation management section, backed up by a robustly managed Facebook page. Ask Nestlé has been given more prominence, and serves as a magnet for visitors with questions or concerns about the

much-criticised company. It is regularly updated with conversational statements about current criticisms and crises. Few companies go this far in airing sensitive topics so openly.

2

Bayer has been busy polishing, and with many detailed improvements has worked its way up to the second slot. It consists of a huge federation of sites and social media channels, held together with remarkable skill and allowing customers and others to get to the pages they need with little pain. It also does a remarkable job of presenting itself as an exciting place to work, with a mass of engaging features.

3

Eni has been busy polishing an already shiny site and puts particular care into important but easy-to-neglect sections such as the contact page and corporate governance. It has also taken a bold step into 'storytelling' with its Eniday site, featuring engaging content written by independent journalists.

NEW ENTRANTS TO THE INDEX

The Bowen Craggs Index of Online Excellence has drawn from a far bigger pool of companies than in past years – in 2016 we evaluated the 200 largest companies in the world for our ranking.

As a result, five companies not normally considered have really shone this year, and make their first appearance among the top 30 online corporate communicators in the world.

Maersk

Overall score: 206

Position: =9

Maersk Group's new website achieves a very high visual impact, through responsively designed pages that employ bold, distinctive imagery, polished graphics and embedded videos to get the company's messages across.

Standout feature:

Interactive map tracking the current location of Maersk vessels around the world in real time.

www.maersk.com

ING

Overall score: 200

Position: 16

Like many large companies, ING seems to be experimenting with different ways of incorporating story-type content into its corporate site, but ING could do much more to promote movement between stories and relevant corporate content.

Standout feature:

The country contacts directory is well constructed. When the page is viewed on a desktop, this directory automatically defaults to to the country the person is in.

www.ing.com

EMC

Overall score: 197

Position: =18

Although it may be about to disappear into Dell, EMC's website makes a strong impression, especially on the home page and upper (customer focused) areas of the site, but corporate areas are considerably less impressive looking.

Standout feature:

The Big Data area makes exceptionally good use of videos and stories to explain the company's purpose, vision and commitment to responsibility (as well as the customer offer itself).

www.emc.com

Ford**Overall score: 196****Position: 20**

Ford's global corporate site is a modern, visually striking and in places very rich source of information about the company, such as the outstanding sustainability report.

Standout feature:

The interactive history timeline is excellent. Celebrated moments in Ford's history from the launch of the Model T to the creation of the first production line and the doubling of worker pay are shown alongside less well-known moments.

<http://corporate.ford.com>

Nordea**Overall score: 195****Position: =21**

Financial professionals get an unbeatable service, as do CSR analysts, and Nordea is unusual in trying to answer difficult questions about the role of banks.

Standout feature:

Nordea's online job search is offered in five languages (English, Danish, Norwegian, Suomi, Swedish), with job descriptions listed in the language most relevant to the role.

www.nordea.com

'Like many large companies, ING seems to be experimenting with different ways of incorporating story-type content into its corporate site.'

METHODOLOGY

The Bowen Craggs Index of Online Excellence ranks the 30 best online corporate communicators in the world. It measures the entire corporate online presence: websites, social media and other digital channels; and across all devices – computers, smartphones, tablets and others. To generate our top 30 ranking, we evaluated the online estates of the world’s largest 200 companies, a far bigger pool than in past years.

Our methodology is based on the fact that large corporate web estates could hardly be more different than news, social media or government service sites. They are complex, deep, multi-functional and visited as rarely as people can get away with.

That is why the methodology behind the Bowen Craggs Index of Online Excellence is widely regarded in the corporate world as the gold standard for measuring online digital communications:

- The methodology was created in 1997 but is constantly evolving based on continuing feedback from large organizations and our own expertise. Our network of 500+ communications professionals from around the globe

grows our knowledge; as does our constant audience research focused on the investment community, media professionals, policy makers, jobseekers and consumers.

- It is immune to fashion. Our reviewers look for the hard business case behind the latest trends – social media, responsive sites, etc – and ask whether they are appropriate for large organizations.
- It is rigorous but not automated or a ‘check box’ exercise. Every metric is judged by its relevance to the client, rather than ‘is it there or is it not?’ We are as much experts on how large organizations are run and managed as we are on the internet.

‘Our methodology is based on the fact that large corporate web estates could hardly be more different than news or social media sites.’

For more information on our methodology, please visit: www.bowencraggs.com

ABOUT BOWEN CRAGGS

We review. We measure. We advise.

To make your website and social media channels better for your business and your customers.

What we do

We are experts in global online corporate communications. We help you improve the effectiveness of your websites, mobile and social channels.

You can rely on the independence of our advice because we do not build websites. What we do is help you to improve your effectiveness with clear strategy, expert benchmarking, market research, analytics, best practice and content strategy.

Bowen Craggs is unique: we specialise in group-level digital communications. Here are three ways you can benefit from our knowledge and expertise:

Access research that will improve your online strategy

The world's deepest analysis of corporate online estates. Constant audience

research across all stakeholder groups. A trusted and growing global knowledge-sharing network. These are the cornerstones of our research reports and bespoke consultancy.

Explore the word's most powerful resource for global web managers

Receive an exclusive pass to the Web Effectiveness Database – the engine for the Bowen Craggs Index. Email ddrury@bowencraggs.com for your free login to this searchable wealth of information.

Read our weekly insight and analysis

For regular commentaries on all aspects of online corporate communications, subscribe to our newsletter.

www.bowencraggs.com/subscribe/

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WHAT ELSE TO LOOK OUT FOR IN 2016

Top 10 category rankings

We will publish rankings of the top 10 online corporate communicators for IR, jobseekers, CSR and media.

Enhancing the Bowen Craggs Web Effectiveness Database

We will be expanding our subscription-only research tool to include detailed examples of online best practice from

the biggest 200 companies in the world and beyond. Personal support is available from a Bowen Craggs consultant, from tutorials to best practice identification.

Web Effectiveness Conference 2016

Best practice and peer networking in a vendor-free environment, this year's conference will be on the 15th & 16th June at the Skt. Petri Hotel, Copenhagen. The agenda is here: www.weeffectivenessconference.com

We are seeking nominations for best overall online corporate communicators, and individual examples of best practice. For more information please contact Dan Drury: ddrury@bowencraggs.com

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