

Index of Online Excellence 2018: A ranking of the world's best online corporate communicators



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Overview: signs that companies are seeing the light

When we published the last Index of Online Excellence, a little under two years ago, we were somewhat gloomy. ‘A depressingly large number of companies have a vague idea of the importance of online communication, yet are not giving it the resources it needs,’ we wrote.

Well, there are signs this may be changing.

It is still true that bosses in most large companies – the group whose online corporate communications we measure – still regard their corporate websites and social channels as marginal. They do not generate direct revenue; so why put resources into them? In our recent [‘Explain yourself’ Index document](#), we said that we ‘are regularly surprised by the lack of interest senior managers show in their primary communication channel’.

But the deeper analysis we draw from this full Index – the tenth we have published since 2007 – gives reasons to be cautiously hopeful. In particular, companies that previously showed no interest at all have seen the light.

The Index of Online Excellence is derived from reviews of the biggest companies in the world by market capitalisation to find those that use their websites and social media most effectively for online communications. The Index itself consists

‘Corporate websites and social channels do not generate direct revenue, so why put resources into them?’

of the 30 best (though because there are ties, there are actually 32 – see Methodology on page 12).

Lukoil – the first Russian company in the Index

We have a Russian company appearing in the list for the first time. Lukoil is one of the largest oil companies in the world yet is hardly known outside its home market – and its previous website reflected a lack of interest in changing that. Look at lukoil.com now: slick, smart, informative, global. *Note: Bowen Craggs has provided consultancy services to Lukoil among several others. See Methodology on page 12.*

Verizon – bursting with good practice

Almost as surprising is to see [Verizon](#) here. Why? Because Verizon, like most US companies, used

to have a miserable corporate site. In our 2012 Index (when we used to review bad as well as good sites), it scored 163 – distinctly third division. Now it gets 194, not quite Premier League, but definitely up there. Its separately run marketing sites are poorly coordinated and bring the score down but the corporate ‘About’ area is as slick as anyone’s, and bursting with good practice.

All because Verizon decided to take corporate communications seriously for the first time a few years ago, set up a central web team, and worked out how to do it. In other words, to come back to a constant theme, it got its governance right.

Experimental Americans

Verizon is an exception – there are still only four US companies in this list, and web governance remains a foreign concept in most American board rooms – but we detect movement here. [Ford’s corporate social responsibility reporting](#) is as good as it gets (remarkable in a country where

‘Verizon, like most US companies, used to have a miserable corporate site’

data-based CSR reporting was slow to get off the ground), and [Coca-Cola's magazine site](#) is as experimental as ever. We know of more activity in the US; watch this space.

Ten trends to watch

As exciting as the tick-up in senior interest is the increasingly restless activity we have detected at the coal face: digital teams have been busy with the detail. As our senior reviewer notes, 'companies are starting to innovate more with their online comms. When I dip into corporate sites, more often than not I seem to find something to shout about.'

To come back to specifics, our reviewers have spotted a number of trends and developments:

- **Once again, the companies at the top are those that have polished their online presences once, twice and again.** Relaunches rarely lead

'The companies at the top are those that have polished their online presences once, twice and again'

'As exciting as the tick-up in senior interest is the increasingly restless activity we have detected at the coal face'

to immediate score rises; polishing always does. See 'Lessons from the leaders' on page 9.

- **In 2017 responsive design became the default.** The brave hold-outs have now fallen into line. [Siemens](#), which previously had separate sites for desktop, mobile and even tablet, now has a single responsive site – and a very good one at that. Some companies are taking mobile usability very seriously, though that should not mean putting mobile ahead of desktop: [Unilever](#) and [HSBC](#) make it notably easy to drill down through complex sites using dropdown menus.
- **Responsive sites have tended to lead to a certain visual sameness by restricting the types of layout that work.** However, much work has been done to counter that with graphical skill, and there are more beautiful corporate sites now than ever. Companies that exploit pictures

particularly well include [Axa](#), [Coca-Cola](#), [Eni](#) and [Shell](#); [Roche](#) continues to use interesting typefaces with flair; while 'looping videos' bring otherwise dull pages to life on sites such as [Verizon](#) and [Maersk](#).

- **The problem, as we have noted many times, is that beauty is too often linked with degraded navigation as menus are tucked away out of sight.** This is a continuing issue but one that is increasingly being recognised by web teams. Thus [GSK](#), which relaunched this year without a left menu, has done everything it can to counter the inevitable problems. It almost succeeds in neutralising them; but not quite.
- **There have been brave efforts to find that most elusive creature: the internal search engine that works.** Eni has tried hardest, with a mechanism that assembles results pages dynamically, as long as you ask the right questions. The trick is to select one of the pre-configured questions that appears when you do a search. If you ask what Eni does in Algeria, or who designed the logo, you will be given excellent information. Ask what Eni's profit is, and you will not be so lucky. But there are also companies that provide decent results with a standard engine, including [Siemens](#): careful design and persistent adjustment will pay off.

‘The “global-local” question continues to tax large corporations’

- **The novelty of ‘stories’ has worn off.** Although magazines such as [GSK’s Behind the Science](#) and [Axa’s Spotlight](#) illustrate the wisdom of making a corporate site a ‘destination’ in its own right, there has been greater emphasis on applying editorial skills to corporate information.

For example, [BP’s major projects section](#) has been greatly boosted with videos, pictures and facts, as well as an interactive map showing where the schemes are. Web-only mechanisms are deployed alongside words and pictures, but journalistic techniques are used to make them as engaging as possible.

- **The ‘global-local’ question continues to tax large corporations:** how to serve local audiences while transmitting global messages and – most important – keeping costs down. Shell and [L’Oréal](#) are exceptionally good at sharing words across their country sites. The trick is to do this without stripping a local feel from local sites.

- **There has been a fashion for cutting the size of sites.** [Microsoft](#) and [Cisco](#) have notably thin ‘About us’ sections, relying mainly on links to other part of their fragmented sites. [Reckitt Benckiser](#) has a handful of (albeit long) pages. [HSBC](#) puts the great bulk of its history material in a PDF document. While it is a good idea to be concise where appropriate, being concise for the sake of it is not. One of the web’s strengths is that it can hold a great deal of material; another is it can be organized in a way that makes it easy to find. A third is to provide interactivity that can, for example, bring a history section to life. This is understood by many of the top performers: as we note above, BP’s company information sections have been greatly boosted, while Nestlé’s are exceptionally rich. We have also

‘While many sites remain determinedly “corporate”, some are trying hard to justify their existence by supporting the marketing effort’

‘While it is a good idea to be concise where appropriate, being concise for the sake of it is not’

found examples of careers sections being cut for the sake of it. Why? Jobseekers want to know as much as they can about a place where they may spend many years of their life.

- **While many sites remain determinedly ‘corporate’, some are trying hard to justify their existence by supporting the marketing effort.** Siemens switched emphasis a while ago, and now has long and engaging pages telling about everything from wind turbines to MRI machines; and Maersk has now made a similar move. It is less strong on ‘stories’ than it was, but has more about its business – though without losing the visual flair that makes it stand out.
- **Social media meanwhile has continued to mature,** with the established channels better used and new ones increasingly exploited; 2017 was the year of corporate Instagram. See Social media on page 11.

The top 30

Figures in brackets = maximum scores ↑ Up from 2016 ↓ Down from 2016 * New entry to Index ♦ No change from 2016

Position		[280] Total score	Company	Total score 2016	Position 2016	[60] Construction	[48] Message	[12] Contact	[32] Serving society	[32] Serving investors	[32] Serving the media	[32] Serving jobseekers	[32] Serving customers
1	↑	216	GSK Modern, minimalist and highly informative; a product of restless revision and perfecting	207	5	44	40	11	26	24	22	27	22
= 2	♦	213	Bayer The challenge of a decentralised company structure is remarkably well met by the web estate	211	2	48	39	9	26	25	25	22	19
= 2	↑	213	BP Several small improvements have pushed the site nearly to the top of the Index	208	4	49	38	8	26	27	19	22	24
= 2	↓	213	Nestlé What makes Nestlé's online estate so good is not how it looks, but the quality of its information	216	1	45	41	11	28	23	25	20	20
5	↑	212	Eni Eni has worked hard to produce one of the best – and most unusual – web estates in the world	209	3	45	39	11	27	26	22	20	22
6	↑	209	Unilever An already good website has been made increasingly better and more effective	202	14	47	39	9	26	25	19	21	23
7	↑	206	Siemens Siemens has introduced a bold, modern look and 'new journalism' techniques across the site	205	11	37	39	9	25	24	25	23	24
= 8	↓	205	Roche A site that has not fundamentally changed in several years, but remains highly effective	207	5	42	39	7	26	21	20	25	25
= 8	↓	205	Shell An editorially rich online presence, with a huge amount of magazine-style material	207	5	40	36	8	24	29	19	23	26
= 10	↓	202	BASF A site with many strengths; particularly good at introducing the company to new audiences	206	9	40	37	8	22	25	22	26	22

The top 30 *continued*

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= 10 ↑	202	ING Consistently effective, and makes the most of editorial and thought leadership material	200	16	40	36	10	25	24	23	21	23
= 12 ↓	201	A P Moller - Maersk Following a refresh, it continues to set standards in design; editorially it remains excellent	206	9	38	42	9	22	23	17	25	25
= 12 ↓	201	Novo Nordisk Dynamic storytelling puts a human face on the company's efforts to tackle disease	207	5	46	36	10	23	18	23	24	21
= 12 ↑	201	SAP A fragmented estate continues to evolve, with real efforts to improve consistency and navigation	197	18	38	39	7	24	24	22	23	24
15 ↓	200	British American Tobacco A powerful and engaging tool for promoting BAT as a sustainable company working in the global tobacco industry	203	12	44	33	9	27	26	17	22	22
= 16 ↑	198	Ford Motor Company Visually striking and in places a rich source of information about the company	196	20	38	36	7	26	23	24	20	24
= 16 ↑	198	Rio Tinto A compact estate for a company of Rio Tinto's size, with a ruthlessly strategic approach to freestanding country sites	195	21	42	36	9	23	23	20	23	22
= 18 ↓	196	L'Oréal A site that displays a wide mix of strengths and weaknesses, after multiple incremental improvements	203	12	39	38	7	25	23	19	23	22
= 18 ↑	196	Nordea A clean and conservative site that serves professional audiences particularly well	195	21	44	32	8	22	25	21	22	22
20 ↑	195	HSBC Strikes an appropriately corporate tone, while positioning the company as a leader in business and finance	190	30	39	37	9	24	23	18	22	23
= 21 *	194	AstraZeneca Tells stories in innovative and engaging ways, with striking imagery and visual flourishes	n/a	n/a	39	39	9	22	22	19	24	20

The top 30 *continued*

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= 21 ↑	194	Barclays Strong design and structure, with a home page that promotes the bank as forward looking	192	26	35	36	8	24	26	16	25	24
= 21 ↑	194	IBM IBM's web estate is complex and constantly evolving, and focused more on customers than corporate audiences	193	24	36	36	7	23	22	22	25	23
= 21 *	194	Verizon Communications Slick and often innovative, the company continues to make incremental improvements	n/a	n/a	42	36	4	23	23	20	27	19
= 25 *	193	AXA The whole site reads and looks like a magazine, and stories are at the center of a compelling home page	n/a	n/a	38	38	10	25	26	15	23	18
= 25 *	193	Lukoil A site that serves investors and customers particularly well, and is effective elsewhere	n/a	n/a	41	35	9	23	25	19	17	24
= 25 ↓	193	Total The Total web estate has changed substantially in many areas, and improved in a number of them	199	17	39	36	7	26	25	21	21	18
= 25 *	193	Zurich Zurich's corporate estate has improved in some areas, declined in others, but is among the best in the world at serving investors	n/a	n/a	39	34	8	24	27	21	17	23
29 ↓	192	Coca-Cola Coca-Cola's 'Journey' continues, having launched several country versions of its magazine-oriented corporate site	191	28	38	40	10	25	17	15	24	23
= 30 ↓	191	Daimler With a refreshed look, it is strong in some areas but suffers from fashion-driven usability problems	192	26	37	37	7	23	21	24	20	22
= 30 *	191	Tetra Pak Exceptional visual impact and a consistent experience across 60 country and language versions of its site	n/a	n/a	43	35	8	22	22	20	18	23
= 30 *	191	Vodafone Shines in promoting the company's reputation for responsibility, but navigation remains confusing	n/a	n/a	36	33	6	24	25	21	22	24

Lessons from the leaders

GSK (1st)

GSK has added an impressive nine points since we last reviewed it, and leapt to the head of the Index. Like so many other top performers, this is a story of steady polishing, though with a surge of activity recently. The biggest jump is in the ‘message’ category, with the home page sporting stronger headlines, people pictures brought to life with captions, and ‘About’ given a powerful new history section. Careers sections should lead the innovation charge online, and gsk.com does just that with video blogs from employees in the field, as well as powerful use of interactivity and social media. But GSK hasn’t forgotten the boring-but-important bits – the contacts service is now best practice, corporate governance coverage has been strengthened, and the Flickr image library streamlined.

Other notable lessons:

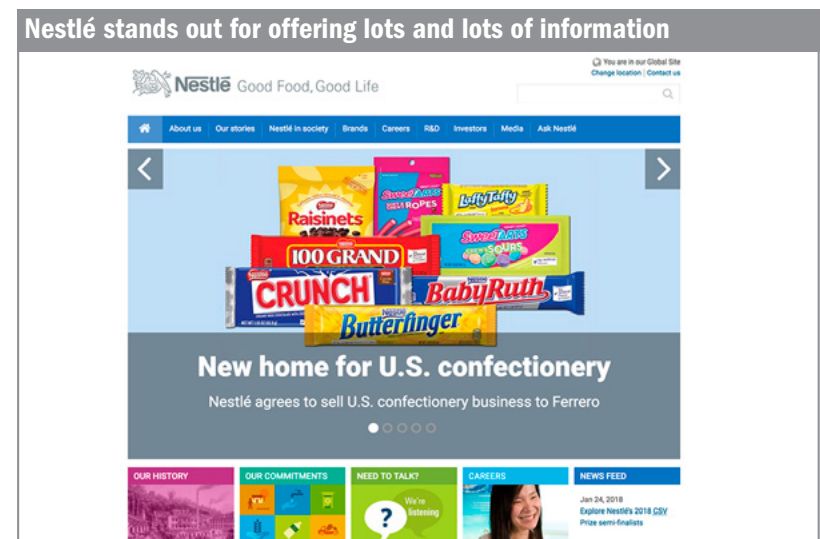
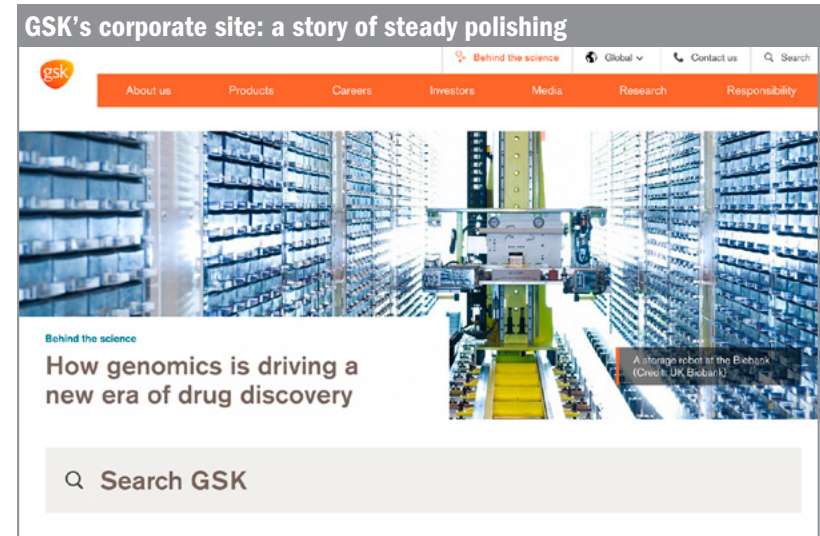
- A well-executed worldwide sites menu in the header, with an intuitive mix of links to country sites or country contact pages.
- GSK’s overtures regarding transparency are convincing, and the company uses the whole estate, including social media, to leverage its reputation for responsible behaviour and actions.
- A system of customer signposts in a Products section, which simplifies navigating a complex brand and country-site landscape.

Nestlé (2nd equal)

Nestlé (2nd equal) has slipped a little from its top slot, but is still impressive. It is way off the cutting edge when it comes to look and feel, but stands out for doing what a corporate site should do: offering lots and lots of information. It is using this to reposition itself in the world, understanding that it has long been a magnet for criticism, and trying to explain that it is serious about ‘doing good’, as well as selling food. The most striking example of this is the high-profile ‘Ask Nestlé’ section on the global website, which candidly answers tough questions about its activities and stances. The section responds to specific issues around the world, and appears on country sites where it makes sense. A new magazine section covers the positive side of responsibility initiatives. Across the site there are many instances of best practice, large and small – including an interactive ‘year I was born’ feature, and intriguing use of Instagram, Pinterest and Tumblr.

Other notable lessons:

- A home page with a clean, modern and bright look. Headlines are impactful in style and supporting links are well chosen to signal openness and transparency.
- The entire web estate projects Nestlé convincingly as a global company with an international mindset, interested in engaging with a genuinely global stakeholder base.



Lessons from the leaders *continued*

BP's site has retained its core strength: excellent usability

Bayer's site manages to keep up with a company in constant flux

BP (2nd equal)

BP has nudged up the Index through a series of small improvements. It keeps its core strength, which is excellent usability based on a refusal to discard 'old fashioned' devices such as left menus.

Like Nestlé, BP is using its site to reposition the company. It has pretty much moved beyond the Gulf of Mexico disaster, and is emphasising a positive future – specifically how it wants to be involved in the 'energy transition' to lower carbon energy sources.

Enhanced information on its activities, especially major projects, helps tell this story, as do the detailed and engaging Energy Economics section and Magazine. If anyone remotely interested in the energy world is looking for a really good read, BP.com is hard to beat.

Other notable lessons:

- Impressive coordination of the web estate – there is a good deal of content sharing; for example, the fuel station finders, and the use of different branding but the same template on other group sites.
- The overall look and feel of the site is strong, with impressive consistency across the BP estate.
- Data for CSR professionals remains at the cutting edge, while financial professionals and private shareholders get an exceptional service.

Bayer (2nd equal)

Bayer is in a state of almost permanent reorganization, and the fact that its web estate manages to keep up without falling to bits is itself a reason for congratulation. But the site – or rather, web estate of hundreds of sites – is remarkably successful at moving with its owner.

A common set of templates is matched by a sophisticated tool on every page that lets people find their way across the estate, while Bayer also possesses that rare beast, an excellent internal search engine. The site pumps out evidence of restless innovation through online magazines – the targets, most obviously jobseekers, are likely to be impressed.

Other notable lessons:

- The home page is brought to life by a patchwork of images that turn into headlines when moused over.
- Investment analysts who are new to the company are presented with a mass of useful information about the group.
- An innovative careers app includes sophisticated 3D and virtual reality videos.

Social media: less established channels flourish

Large companies took a long time to understand social media at a corporate level – they could use it for brand-building and customer service, of course, but attempts to create a company voice – or even have a conversation – were too often badly handled.

That started to change a few years ago by fixing the root of most problems – governance – with the transfer of social media to the team that manages the corporate website. Those companies that have done that – and many still have not – have found they are finally able to use social channels and websites to support each other. That does not necessarily mean social channels should direct traffic to the sites – though they often do – but they must be telling the same story. We see companies such as Nestlé and BP using Facebook



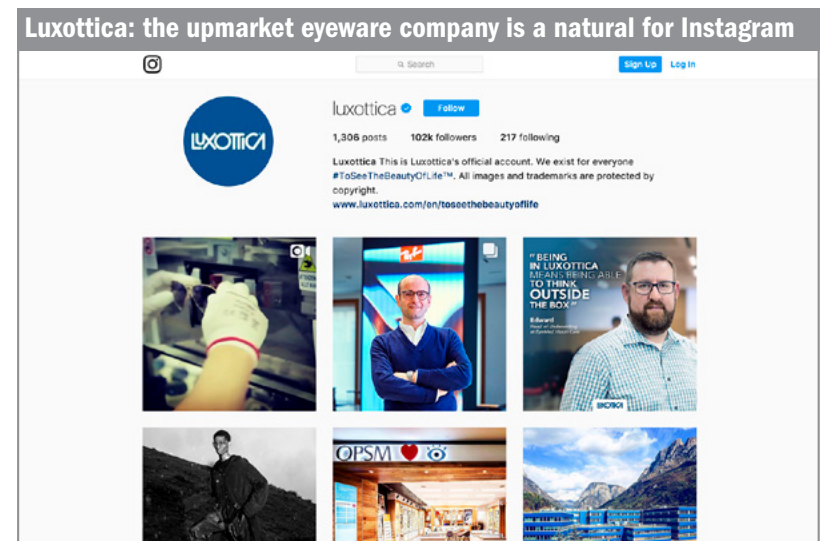
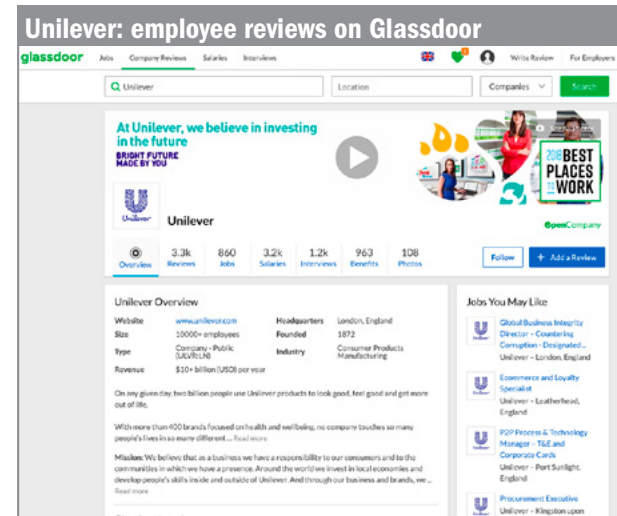
and Twitter actively to defend their reputations as well as to promote positive initiatives.

But the real excitement has been away from the ‘established’ channels. Instagram is where the action is at the moment.

Companies that have highly visual products are natural for Instagram. Luxottica, the upmarket eyewear group, exploits this well, as does L’Oréal in the Middle East with its #lorealtalentme collection: Instagram is popular with HR departments.

‘Takeovers’ of the corporate Instagram account by employees are flourishing. Alberto, who works for Nestlé as ‘an IT manager from the US’ put up pictures of the place he works and (probably) his daughter and dog. And in January Nestlé turned over its account to ‘NesPepper’, a robot, for a week. BP ran an Instagram Takeover campaign in October 2017 to mark the end of the latest round of internships. They were held together with a #mybpinternship tag.

HR people are also increasingly linking to Glassdoor, which is brave as it exposes the company to frank (and not always positive) comments posted on the employee reviews site. Links to Glassdoor are more common on US sites – such as Cisco and Intel – but Europeans that have now taken to it include Unilever, AstraZeneca and BNP Paribas.



Methodology

The Bowen Craggs Index of Online Excellence ranks the best online communicators in the world. There are 32 companies, reflecting the 30 top scorers (there are ties for 30th place). The Index measures the entire corporate online presence: websites, social media and other digital channels, across all devices – computers, smartphones, tablets.

To generate the ranking, we evaluated the online estates of the world's largest 200 companies by market capitalisation, as well as other high-performing companies that we know about. Full reviews of all 32 top-scoring estates, as well as best practice extracted from the full 200, can be found by subscribers in our database. See page 13.

Our methodology is tailored to the needs of corporate sites. Unlike most brand or news sites, they are complex, deep and multi-functional. We put great emphasis on usability, but we also look carefully at messaging, and put ourselves into the heads of different groups of users to see how well they are served. We look at social media channels both in their own right and as partners to the websites.

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 2007 but is constantly evolving, based on continuing feedback from our network of large organizations and our own expertise, as well as audience research among 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 and ask whether they are appropriate for large organizations.
- It is rigorous but not automated or a 'check box' exercise. Every metric, whether Construction, Message or Serving investors, is judged by its relevance to the company, 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.

Bowen Craggs has or has had commercial relationships with approximately half the companies in the list. We are confident that this does not in any way affect our judgment and scoring:

- *Most of the companies involved are subscribers to our best practice database – we have not provided consultancy.*
- *Where we have provided it, we have been careful to maintain Chinese walls between consultants and reviewers.*
- *Because we publish our detailed analysis in the database, it would be very difficult to 'adjust' the scores without that being noticed.*

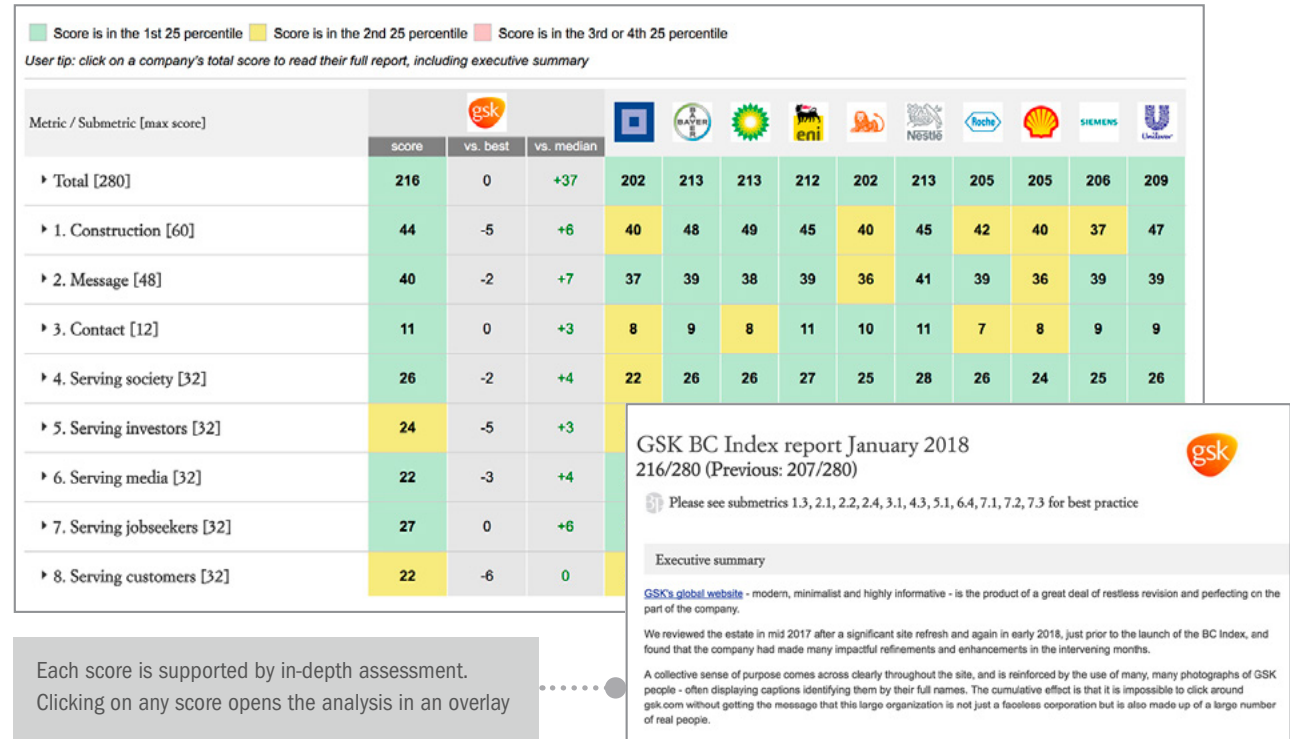
For more information on our methodology, please visit: www.bowencraggs.com

Behind the scores: the engine that drives the Index

The Bowen Craggs database is the engine that drives the Index of Online Excellence. The database contains all of our benchmarking reviews and best practice reports that underlie the scoring.

The benchmarking reviews and best practice reports in the database are a robust, credible and globally recognised method of comparing the performance of digital channels over time and against peers. The constantly updated database helps determine how well your website is meeting the needs of your organization and its online visitors; and to identify the changes required to make the whole of your corporate online estate best in class.

The database also features a best practice search function that organizes more than a million words of reviews and best practice reports, which cover more than 200 of the world's biggest companies. Keyword searches and tags are linked to each of our individual metrics. Results are engineered not just to prioritise our most recent reviews, but to call up excellent features noted by our expert reviewers. You can use these examples to inform improvements to your own corporate web estate.



BOWEN CRAGGS DATABASE: THE BENEFITS

- Pinpoint specific strengths and weaknesses of your online channels with eight individual metric scores and 26 sub-metric scores; and use the baseline scores to measure improvements
- Prioritise the right things and save reworking costs by avoiding mistakes
- Capture senior management attention by showing how your corporate online presence compares against competitors, peers and leaders in online communications
- See the standard your corporate online presence needs to reach to get ahead of the field

For more information about the Bowen Craggs database, please contact Dan Drury.

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.

Our research – gathered over 14 years and used by more than 50 of the Fortune Global 500 – can help you find and maintain the right course.

INDEX OF ONLINE EXCELLENCE

Every year we publish the Bowen Craggs Index of Online Excellence, which is established as the most credible ranking of large corporate online estates, and is underpinned by a deep database of best practice.

FURTHER RESOURCES

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 world's most powerful resource for global web managers

The Bowen Craggs database is the engine that drives the Index of Online Excellence. The database contains all of the benchmarking reviews and best practice reports that underlie our scoring. To find out more, visit www.bowencraggs.com/whatwedo.

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