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Executive Summary

CUSTOMER EXPERIENCE (CX) OVER TIME

STORE CX SCORE STAGNATES AT 78
WEB CX HOLDS STEADY AT 79
MOBILE CX GAINS A POINT TO REACH 80

CX STANDOUTS

STORE WINNERS
WEB WINNERS
MOBILE WINNERS

WHY CX MATTERS
Shoppers who have a great customer experience are

IN STORE
ON THE WEB
IN MOBILE

74% more likely to recommend the store
58% more likely to purchase anytime
64% more likely to transact in that session

LEARN MORE » LEARN MORE » LEARN MORE »
Retailers that provide great customer experiences enjoy higher revenue, better customer loyalty, a bigger market share, and even higher stock prices. Customer experience (CX) is a proven driver of financial success. It’s therefore imperative that retailers measure it in the right way.

To succeed in 2017 and beyond, retail leaders need to manage and prioritize CX improvements across all touchpoints and channels. Siloed channel initiatives will always be a reality, but our data shows retailers need to layer an omnichannel view while still maintaining actionability within each touchpoint. Data shows that retailers should be focused on cross-channel attribution and digital contribution this year. Customers no longer tolerate wholly different experiences in different channels.

While our data shows that CX is stagnating in store and web channels, retailers in those channels have at least maintained their ground, which reflects some hard work to meet rising expectations. The moment retailers get complacent, their scores drop. In the modern landscape, you have to be aggressive just to keep CX scores stable, while actually increasing CX scores requires real creativity and diligence. When measured the right way, CX takes customer expectations into account and helps retailers prioritize ways to meet customer needs and exceed expectations.

ForeSee has produced the annual ForeSee Experience Index (FXI) each December since 2005 and has been measuring and analyzing CX for hundreds of retail clients for 15 years, with more than 200 million benchmarkable experiences. The FXI is the definitive retail CX study quantifying more than 40,000 shopper experiences with the digital (web and mobile) and brick-and-mortar experiences provided by top retailers. The patented ForeSee statistical engine calculates FXI scores for the top retailers in each channel. FXI scores are superior measurements of CX, with a history of accuracy as well as important practical implications for future bottom-line success.

CX: The Retail Battleground
EXECUTIVE SUMMARY

STORE
Channel CX Over Time

Top retailers are talking about omnichannel measurement, but research shows they’re still struggling to move beyond single-channel tactics. Brands often still view CX as the sum of individual and independent parts, while the data shows customers expect and demand integrated, omnichannel experiences more than ever.

**Changes in Channel CX**

**Store CX Stagnates:** Dropping four points since 2011, and scoring 78 on the FXI’s 100-point scale for the second year in a row, store CX is unimpressive. Innovation inspires customers, and we are seeing little of it.

**Web Holds Steady:** Web CX remains at 79 for the second year. Web customers have evolved over the past decade, and retailers have adjusted well to meet rising expectations, due in large part to the prevalence and utility of digital CX metrics.

**Mobile CX Increases:** Mobile CX rises one point to 80, making it the highest-scoring channel. Once only a connector, serving as a precursor to purchases in other channels, mobile is becoming a purchase channel in its own right.
Customer Journey Analytics

Shoppers are migratory creatures. They consume content, comparison shop, make purchase decisions, and share their opinions where and when it best serves them: on websites, in stores, with mobile devices, and through social media. Our collective challenge in the retail industry is to figure out how to paint a complete picture of this customer journey in a way that is at once measurable and actionable — and ultimately profitable.

Visualizing customer journeys can help retailers connect with customers and deliver purposeful customer experiences that reflect and anticipate consumer behavior.
Understanding the omnichannel customer experience has become critical in the modern retail landscape. This table shows FXI scores for retailers that were measured in all three channels. See About the FXI to learn how retailers were selected in each channel.
Omnichannel Insights

BE OMNISCIENT IN OMNICHANNEL

50% of shoppers use their phones in store
59% use mobile to compare prices when in store
50% use mobile to get product details when in store

ONLINE CUSTOMERS ARE THE MOST OMNICHANNEL
70% of online buyers who purchased from a retailer’s store have had a recent digital interaction with the retailer.

WHY OMNICHANNEL CX MATTERS
Retailers that deliver excellent customer experience across all major channels have customers who are

MORE LIKELY TO BUY IN ALL CHANNELS
MORE LOYAL
MORE LIKELY TO RECOMMEND

SHOWROOMING CAN BE POSITIVE
More than one-third of digital shoppers who recently visited a retailer’s store made a purchase online from that retailer.

GREAT CX WHEN IT MATTERS MOST
Digital channels excelled on Black Friday and Cyber Monday, when it matters most.

FORESEE EXPERIENCE INDEX: OMNICHANNEL

EXECUTIVE SUMMARY

MORE LIKELY TO BUY IN ALL CHANNELS
MORE LOYAL
MORE LIKELY TO RECOMMEND
FORESEE EXPERIENCE INDEX

STORE
Store CX Stagnates

CX with brick-and-mortar stores is stuck at 78 for the third year, down from a high of 82 in 2011. It is now the lowest-scoring retail channel.

ALL FXI SCORES ARE ON A 100-POINT SCALE.

TOP PRIORITIES
While each retailer’s top store priorities will differ, overall most stores can benefit from focusing on price and merchandise.

STORE CX STANDOUTS

WINNERS
85 SAKS FIFTH AVENUE
84 APPLE

MOST IMPROVED
82

WHY STORE CX MATTERS
Store shoppers who have a great customer experience are

50% more likely to buy from the store
75% more likely to buy from another channel
74% more likely to recommend the retailer

ALL FXI SCORES ARE ON A 100-POINT SCALE.
The Struggle to Understand and Improve Store CX

Customers develop omnichannel relationships with retailers using a variety of devices and channels, but brick-and-mortar stores add the element of in-person interaction, where retail associates put a face and voice to the company. Four ways to improve the store experience are:

1. **Dive deep on improvement priorities**
   FXI data shows that price and merchandise are top priorities for most retailers, but that doesn’t tell a specific retailer whether that’s true for them. For price, is it perceptions of prices, perceived value, or something else? A merchandise issue could be the variety, appeal, or quality of the merchandise, or all three. You can’t always change the reality, but you can often change expectations.

2. **Tie CX to the bottom line**
   Find out if customers are greeted, assisted, and walked to their desired product, and then quantify the impact of those actions on CX, sales, average order size, and other key metrics.

3. **Measure store non-purchasers**
   Most retailers remain in the dark about the experience of store non-purchasers. Why did they walk out the door? It turns out there is a new way to measure store non-purchasers. It is low-tech, efficient, representative, and continuous, and uses the same methodology used to measure buyer experiences.

4. **Calculate cross-channel attribution and contribution**
   How do digital experiences influence store sales? How does the store experience influence an online purchase? Omnichannel retailers that apply advanced contribution analytics can answer these questions with certainty.

Store customers can and should be a wealth of insights to help you prioritize improvements — not only in the store channel but in other channels and across the business.
The average FXI score for the biggest brick-and-mortar stores in the United States is 78 for the third year in a row, down significantly from its high of 82 in 2011. While the top of this list is populated with high-end brands like Saks Fifth Avenue, Apple, Neiman Marcus, and Nordstrom; Lowe’s, Kohl’s, and Costco all pass the FXI threshold for excellence (scores of 80 and higher). A customer would have different expectations for Nordstrom (one of the best shopping experiences on the planet) and Costco (more low frills). Yet they each have excellent CX scores because both companies deliver admirably on very different expectations.

### Store FXI Scores

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Customer Experience: Drivers and Outcomes

The FXI model below is based on the multi-patented methodology ForeSee has been using for more than 15 years with hundreds of retailers and more than 200 million benchmarkable customer experiences. On the left side are the drivers that show which improvements will drive a higher FXI score. The right side quantifies the profound financial implications those improvements have in business terms.

Drivers of the Store Experience

**TOP DRIVERS FOR IMPROVING STORE CX:**

- **Price** 72%
  the fairness and competitiveness of product prices

- **Merchandise** 52%
  the appeal, variety, and availability of products

- **Service** 16%
  the availability and helpfulness of store associates and the service at checkout

- **Store Environment** 4%
  the layout of the store, how well the products were organized, and the appeal of the store environment

Outcomes of a Great Store Experience

**CUSTOMERS WHO HAVE A GREAT STORE CX ARE:**

- **50%** more likely to purchase from that retailer’s store
- **75%** more likely to make a purchase in another channel
- **60%** more likely to buy from that retailer the next time they buy similar merchandise
- **74%** more likely to recommend the store to a friend, family member, or colleague
Store Insights

EMPLOYEE ENGAGEMENT DRIVES CX
Retail employees wear their hearts on their sleeves, and their engagement has a huge impact on customers' experiences in stores. Our data, for the third straight year, confirms that increases in employee engagement significantly increase customer satisfaction in stores.

CX DRIVES NPS
If you want to move the needle on Net Promoter Score™, you need to address the drivers of CX first.

Amazon is just starting to experiment with stores — academic bookstores and small grocery concepts without cashiers. Amazon might be emboldened by this FXI datapoint.

STORE SHOPPERS ARE BULLISH
86% say they will spend as much or more this year on gifts

36% think the economy will be better in a year
23% think it will be worse
41% think it will be about the same

Only 14% say they plan to spend less

AMAZON SETS THE STANDARD, EVEN FOR STORES

85% purchased from Amazon in the last year
59% shop at Amazon at least once a month
60% want Amazon to have stores

NPS BENCHMARKS FOR ALL FXI-MEASURED COMPANIES ARE AVAILABLE UPON REQUEST.
Web CX Steady

CX with web is steady at 79 for the second year in a row. Retailers are keeping up with rising expectations but not exceeding them.

TOP PRIORITIES
Each retail website’s top priorities will differ. Overall, most websites should focus on price and merchandise.

WEB CX STANDOUTS

WINNERS
- AMAZON 85
- ADIDAS 84
- L.L.BEAN 83
- TOYS R US 82

MOST IMPROVED
- JCPenney 81

WHY WEB CX MATTERS
Web shoppers who have a great customer experience are

- 60% more likely to buy from the website
- 58% more likely to buy from another channel
- 64% more likely to recommend retailer
Optimizing Web CX

Retailers have sacrificed innovation for imitation. When we started the FXI 12 years ago, only the most-advanced retailers were using a scientific measure of CX to predict future outcomes and improve sales. Now almost everyone is, yet web CX remains stable. The truth is that retailers have to do a lot of work just to maintain a stable CX score. Leapfrogging ahead of Amazon requires creativity, innovation, and a strong risk tolerance. The voices of your customers can guide efforts and mitigate the risk involved in innovation, fulfilling CX’s promise as a real competitive advantage.

To optimize digital CX and become an advanced practitioner, consider the following:

**Integrate web analytics**
Once data is integrated, each type informs the other, and insights can take on additive value.

**Collect feedback**
An opt-in feedback tool in addition to random sample surveys can help you find and fix issues before they escalate.

**Deconstruct the customer journey**
Analyze all digital experiences that can be isolated, measured, and optimized, such as browsing and findability, post-purchase, post-visit, cart or checkout abandon, buy online and pick up in store (BOPIS) or ship to home, gift registry, loyalty, chat, and authenticated environments.

**Use visualization analytics**
Viewing replays of actual customer sessions and heat maps helps accurately pinpoint struggles.

**Connect CX to ROI**
To champion CX across the customer journey and across the organization, you need to prove its bottom-line impact.

**Extend from web to mobile**
If you’re not already looking beyond your desktop web experience, you need to measure and analyze across the complete digital customer experience, including web, mobile phones, tablets, and apps.
It’s important for retailers to be able to benchmark their performance against competitors and best-in-class companies. All Web CX scores are on this page; subsequent pages show more detail by subcategory.

### WEB CX SCORES

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APPAREL AND ACCESSORIES

Apparel and accessories retailers are facing real challenges. Customers are moving online. The competition from mass merchants and online retail giants is fierce. New technologies proliferate at breakneck speeds. Adidas (84), L.L.Bean (83), Fanatics (80), and Victoria's Secret (80) are clearly meeting those challenges, while J.Crew (76) and Urban Outfitters (73) are suffering. Overall, the category is struggling, with nine of 15 measured retail websites posting declines in their scores this year.

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FORESEE EXPERIENCE INDEX: WEB

The table above shows the scores for various apparel and accessories retailers from 2005 to 2016. The scores are categorized by the average, with each retailer listed with their scores for each year. The table also includes columns for change since last year and change since first measured.
COMPUTERS AND ELECTRONICS

Computer and electronics retailers are in an incredibly competitive field, a truth you can see reflected in the extremely narrow range of scores. Only four points separate industry leader Apple (81) and laggard TigerDirect (down three points to 77). Not surprisingly, Apple is winning the CX game for computer manufacturers, comfortably edging out HP, Dell, and Lenovo. Although Amazon is listed in the Mass Merchants category, they have substantial sales in computers and electronics, and their FXI score (85) beats everyone in this category.

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Change Since Last Year: 5
Change Since First Measured: 9
HOME GOODS

Home retailers exhibit outstanding CX performance, with half the category scoring above 80, generally considered the threshold for excellence. Home Depot has had the most improvement over time, boosting a once-low score of 69 to an industry-leading 80. Wayfair (76) trails a tight field so substantially that they are risking sales and market share in 2017 if the company doesn’t improve CX quickly.

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MASS MERCANTS

The mass merchants are the retailers competing with nearly every other retailer in every category. Amazon in particular is also setting customer expectations across the board, since 87% of all digital customers shop at Amazon, and it is the highest-scoring web retailer (85). However, Amazon is down a point, and several specialty retailers are nipping at the e-retail giant’s heels (Adidas, 84, and L.L.Bean, 83, shown in the Apparel and Accessories table). JCPenney has gained three points in the last year to 81 (and +10 since it was first measured).
SPECIALTY RETAILERS

Like retailers in the apparel and accessories category, specialty retailers have been hit hardest by the evolution in CX over the past decade. They’re competing not only with each other but with upscale merchants and department stores, online retailers, and omnichannel players. Moreover, they tend to have lower conversion rates than big chains do, and often their product lines are viewed as nonessential. Yet e-retailers such as Toys R Us (82), Vistaprint (81), and Office Depot (80) are bringing their A-game, comfortably surpassing the category average of 78. Groupon Goods is struggling to deliver a good experience, with a subpar FXI score of 73.

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FORESEE EXPERIENCE INDEX: WEB
Customer Experience: Drivers and Outcomes

The FXI model below is based on the multi-patented methodology ForeSee has been using for more than 15 years with hundreds of retailers and more than 200 million benchmarkable customer experiences. On the left side are the drivers that show which improvements will drive a higher FXI score. The right side quantifies the profound financial implications those improvements have in business terms.

**Drivers of the Web Experience**

**TOP DRIVERS FOR IMPROVING WEB CX:**

- **Price 94%**
  the fairness and competitiveness of product prices

- **Merchandise 40%**
  the appeal, variety, and availability of products

- **Navigation 14%**
  how easy it is to find pages, the consistency of layout, and the ease of narrowing choices

- **Product Descriptions 16%**
  the thoroughness, clarity, and detail in product descriptions and images

**Outcomes of a Great Web Experience**

**CUSTOMERS WHO HAVE A GREAT WEB CX ARE:**

- **60%** more likely to purchase from that retailer’s website
- **58%** more likely to make a purchase in another channel
- **64%** more likely to buy from that retailer the next time they buy similar merchandise
- **64%** more likely to recommend the company to a friend, family member, or colleague
Web Insights

Customers Still Love Amazon

Emotional Connections Pay Off

Visitors who are emotionally connected to the retailer are 27% more likely to make a purchase.

CX Drives NPS

If you want to move the needle on Net Promoter Score, you need to address the drivers of CX first.

A Cart is Not a Cart

41% of shoppers use the shopping cart simply to tally their order or as a wishlist, with no intention to purchase in that session.

If shopping cart abandonment is a key metric, then it could be impressively misleading.

NPS Benchmarks for all Exi-Measured Companies are available upon request.
Mobile CX Improves

CX with mobile* improves one point, making it the channel providing the best customer experience this year.

**MOBILE INCLUDES MOBILE WEBSITES & APPS ALL FXI SCORES ARE ON A 100-POINT SCALE.

WINNERS

85  AMAZON
82  APPLE  H&M
54  COACH  L.L.BEAN

MOST IMPROVED

80  KOHL’S

WHY MOBILE CX MATTERS

Mobile shoppers who have a great customer experience are

more likely to buy from the mobile site/app

more likely to buy from another channel

more likely to recommend the retailer

*MOBILE INCLUDES MOBILE WEBSITES & APPS ALL FXI SCORES ARE ON A 100-POINT SCALE.
In 1877, the Bell Telephone Company made telephones commercially available for the first time. About 64 years later, telephones had achieved a 40% adoption rate in the United States. When the first smartphone was introduced in 2002, it took only 10 years to reach a 40% adoption rate, making mobile technology the most quickly adopted consumer technology in the history of the world.

Mobile retail is no exception. According to eMarketer, smartphone retail m-commerce in the United States nearly doubled from 2015 to 2016, and m-commerce accounts for nearly one third of retail e-commerce sales. All that revenue is up for grabs, and the retailer that innovates the mobile CX will win.

**Measure mobile**
To understand the role mobile plays in your customers’ journeys, you must measure the mobile CX with the same measurement tools you use for web and store. Dedicated mobile sites deliver CX that is two points higher than responsively designed sites, so be aware when comparing scores.

**Challenge convention**
Mobile is ripe for creativity, and more business leaders need to take more chances. Those who do only the bare minimum will be left behind as others innovate and excel. CX metrics can guide you in prioritizing changes and enhancements that will have the biggest impact on sales and loyalty in mobile and other channels.

**Benchmark**
The FXI is a good start. Even if your company isn’t listed here, how does your mobile CX compare to the best-in-class mobile experiences such as Amazon, Apple, Coach, H&M, and L.L.Bean?

**Understand mobile’s role**
Are your mobile site and app complementing experiences in other channels or detracting from them? Are people who interact with you in mobile more or less likely to buy in a store or from your website?

**Prioritize changes**
Mobile CX initiatives often result in reams of data and long lists of items to fix. But knowing which to address first can boost revenue, brand loyalty, and market share, both in mobile and across other channels.
Customers rate their mobile experiences higher than those in any other channel, but we’re seeing only tiny improvements in any individual retailer’s mobile scores.

Kohl’s is the most improved, with a +2 gain to 80; Best Buy, Staples, Etsy, and Walmart each improve one point.

Since 80 is generally considered the threshold for excellence, Amazon, Apple, Coach, H&M, L.L.Bean, HSN, Newegg, Nike, and Under Armour are all top-notch.

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« WEB ABOUT THE FXI »
Customer Experience: Drivers and Outcomes

The FXI model below is based on the multi-patented methodology ForeSee has been using for more than 15 years with hundreds of retailers and more than 200 million benchmarkable customer experiences. On the left side are the drivers that show which improvements will drive a higher FXI score. The right side quantifies the profound financial implications those improvements have in business terms.

Drivers of the Mobile Experience

**TOP DRIVERS FOR IMPROVING MOBILE CX:**

- **Price 84%**
  the fairness and competitiveness of product prices

- **Merchandise 48%**
  the appeal, variety, and availability of products

- **Navigation 36%**
  how easy it is to find pages, the consistency of layout, and the ease of narrowing choices

- **Product Descriptions 16%**
  the thoroughness, clarity, and detail in product descriptions and images

Outcomes of a Great Mobile Experience

**CUSTOMERS WHO HAVE A GREAT MOBILE CX ARE:**

- **64%** more likely to purchase from that retailer’s mobile site or app
- **42%** more likely to make a purchase in another channel
- **50%** more likely to buy from that retailer the next time they buy similar merchandise
- **54%** more likely to recommend the company to a friend, family member, or colleague
Mobile Insights

**CO-BROWSING IS A WONDERFUL THING**

- 76% of Millennials use their mobile phone while in store
- 65% of Generation X use their mobile phone while in store
- 36% of Baby Boomers use their mobile phone while in store

**SHOULD YOU CATER TO MILLENNIALS?**

Millennials are 50% more likely to consider boutique retailers compared to Baby Boomers.

- 42% of Millennials use mobile payment in stores (Apple Pay, Google Wallet)
- compared to only 10% of Baby Boomers

**CONVERSION IS AN ARCHAIC METRIC**

Why are shoppers using mobile?

- 42% to research
- 41% to buy
- 17% Other (store locator, employment, etc.)

Conversion is an outdated KPI. Calculate “true conversion” by honing in on how many intended to buy and actually did. Including other segments is incomplete, or worse, misleading.

**CONTRIBUTION IS THE NEW METRIC**

If they didn’t purchase in mobile, what did they do next?

- 42% visited the same retailer’s website
- 24% visited the store
- 26% went to a competitor’s website
- 15% went to a comparison shopping site
- 13% went to a competitor’s store

If mobile is important to you, measure and understand the contribution that mobile has on all channels, not just that mobile session.

**MOBILE CX SUCCESSES**

- 42% visited the same retailer’s website
- 24% visited the store

**MOBILE CX FAILURES**

- 26% went to a competitor’s website
- 15% went to a comparison shopping site
- 13% went to a competitor’s store

**FORESEE EXPERIENCE INDEX: MOBILE**

« WEB

ABOUT THE FXI »
About the FXI

Since 2005, ForeSee has produced the ForeSee Experience Index (FXI) that quantifies shopper satisfaction with the digital and brick-and-mortar experiences provided by top retailers in the United States and United Kingdom. While there are many sources that offer metrics related to holiday sales or traffic, our objective is to provide scientifically sourced insights that illuminate the “why” behind those numbers. And who better to explain why they purchase — or don’t — and what drives a successful customer experience than the consumers themselves?

ForeSee’s retail clients leverage our unique methodology to continuously measure customer experiences across their web, mobile, and store channels. ForeSee not only helps them know how well they are meeting customer expectations today, we use predictive analytics to identify which elements of the experience need improvement in order to drive business results.

The FXI takes that same renowned analytical methodology and for the 12th straight year applies it to a panel of shoppers who browsed or purchased in web, mobile, and store channels during the holiday shopping season. The result is a series of scores on a 100-point scale with accompanying analysis that retailers can use to compare themselves to competitors, measure changes in customer experiences and satisfaction levels over time, and predict future revenue and loyalty.

This FXI was fielded from November 4 to December 2, 2016, and collected customer experience data from over 40,000 survey responses. We used the following reputable third-party sources to guide inclusion, considering revenue, market factors, and other issues to determine the final lists:
- Web: Internet Retailer Top 500 Guide
- Mobile: Internet Retailer Mobile 500 Guide
- Stores: NRF Stores Top 100 Retailers
ABOUT THE AUTHOR

Eric Feinberg

Eric drives ForeSee’s marketing strategy, working closely with the company’s product, sales, and support teams to infuse innovation and operational excellence into its offerings. He is the author of several of the company’s thought leadership studies and a frequent speaker on customer experience analytics and marketing best practices. Eric is a board member emeritus of the Digital Analytics Association (DAA) and an adjunct professor of mobile marketing at the University of California, Irvine Extension. Eric is a graduate of the University of Michigan.

ABOUT THE RESEARCH TEAM

Joyce Davis

Research Manager Joyce Davis works extensively with customer satisfaction data to deliver actionable insights to companies hoping to improve their customer experience across all channels. She earned her B.A. in Sociology from Metropolitan State University of Denver and her M.A. in Survey Research from the University of Connecticut.

Kristofer Klette

Client Analyst Kristofer Klette helps companies understand their customers through solid survey design and meaningful analysis, in order to support marketing and strategic objectives. Kristofer graduated from Southern Illinois University Edwardsville with a B.A. in Mass Communications and a Master of Marketing Research (MMR).

José R. Benkí, PhD

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

ForeSee pioneered customer experience intelligence in 2001 and has become a recognized leader in Voice of Customer (VOC) solutions. The award-winning ForeSee CX Suite helps more than 2,000 companies worldwide — in retail, government, financial services, health care, consumer packaged goods, and other industries — transform their VOC programs into a strategic business discipline that delivers economic impact.

Only ForeSee offers a rigorous approach to customer experience measurement, access to an unmatched 200 million benchmarked experiences, and actionable insights from a team of 200 expert analysts that give certainty to CX improvements. ForeSee is headquartered in Ann Arbor, MI, and has offices in New York; Washington, DC; St. Louis; Cleveland; San Francisco; Mountain View; Vancouver; and London.

Schedule a customized briefing to go deeper into the FXI data. Visit foresee.com/fxibriefing