



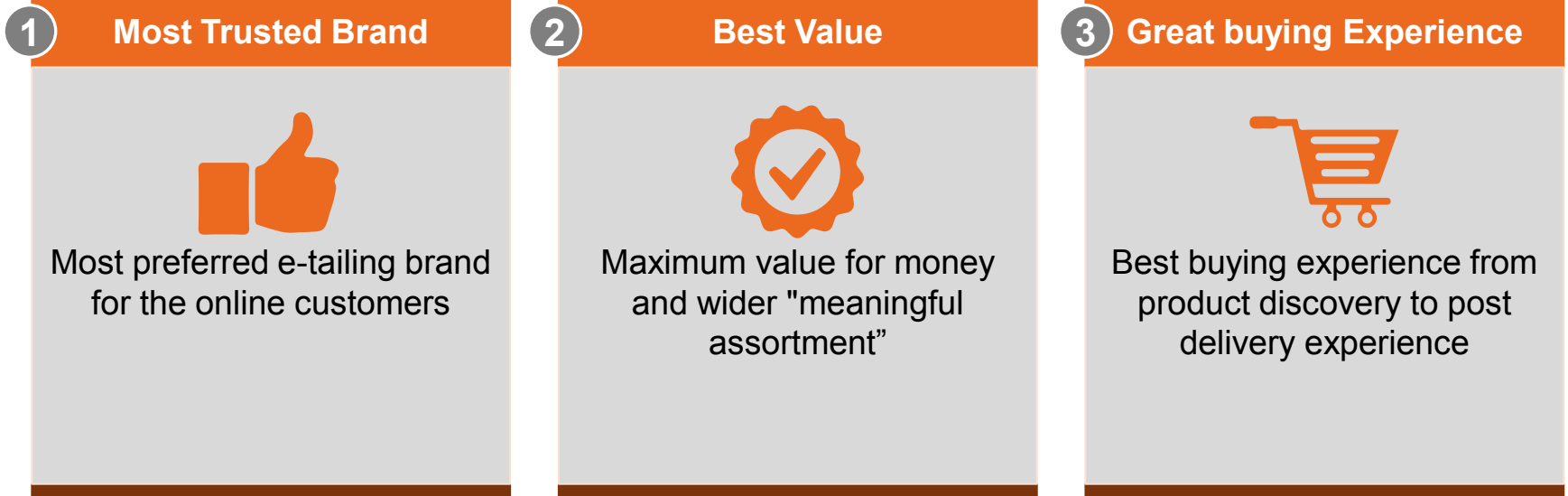
October – December 2016

RedSeer Consulting

What does the E-tailing Leadership Index (ELI) measure?

ELI is a comprehensive assessment of e-tailer's overall performance in customer's mind. It is based on the three pillars, which are:

Indian e-tailing Leadership Index



How is it structured > Most Trusted Brand



E-tailer brand that is most trusted by online consumers



- **Brand Recall**

- e-tailer which has the highest “top of the mind” recall for most preferred online brand



- **Unaided Recall**

- e-tailer which has the highest “unaided” recall for the most preferred online brand



How is it structured > Best Value



E-tailer that provides the best value for money along with meaningful assortment



- **Price competitiveness**

- Where would you find the best prices and discounts available among the e-tailers



- **Product variety and availability**

- What are the chances of finding the product you are looking at among the e-tailers



- **Quality of products**

- What do you think of the quality of product available on each of the e-tailers



How is it structured > Great Buying Experience



E-tailer that gives best end to end buying experience



- **Exploring & ordering products (For web & app)**
 - How easy and intuitive they find product exploration on the app and websites of the e-tailers



- **Delivery predictability and experience**
 - How quick and precise is the overall delivery
 - How quick is the reverse pick-up in case of returns



- **Consumer experience post delivery**
 - How easy it is to return products
 - Speed and ease of refund
 - Quality of customer support



- **Overall NPS**
 - Overall satisfaction of customers with end to end experience based on NPS methodology



Methodology Used:

The results of the study is based on the following research themes:

1

7500 customer surveys across 30 cities (Metro Tier-I and Tier-II) in October to December period

2

All respondents have to be e-tailing customers, having bought something from the concerned websites in the last 3 months

3

The survey was split between the SEC A, B and C population, with equitable distribution of age group and gender

4

Statistical technique of TOPSIS has been used to arrive at the indexing from the responses and hard numbers

5

The study is entirely based on consumer perception and works on a proprietary RedSeer algorithm

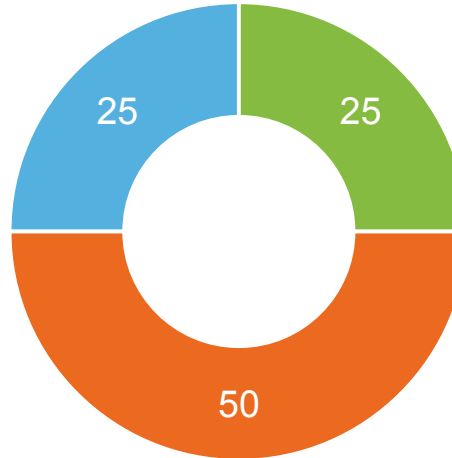
Evaluation Parameters and Weights

The analysis is based on 30+ parameters analysed in the three pillars

A. Most trusted brand:

Most preferred Brand to Shop From

- Top of the mind
- Unaided



B. Best Value Proposition:

Product Variety and Availability

- Product Availability
- Product Variety
- Product Quality

Price Competitiveness

- Pricing and Discount

C: Great Buying Experience:

Web & App Experience

- App & Web
 - Design & Look
 - Ease of Navigation
 - Product Description
 - Check Out Experience
 - Payment Gateway Experience

Delivery/Cancellations/Returns

- Delivery Time
- Reverse Pick-up speed

Consumer Experience Post Delivery

- Refund (Days)
- Customer Support¹
- Ease of Return

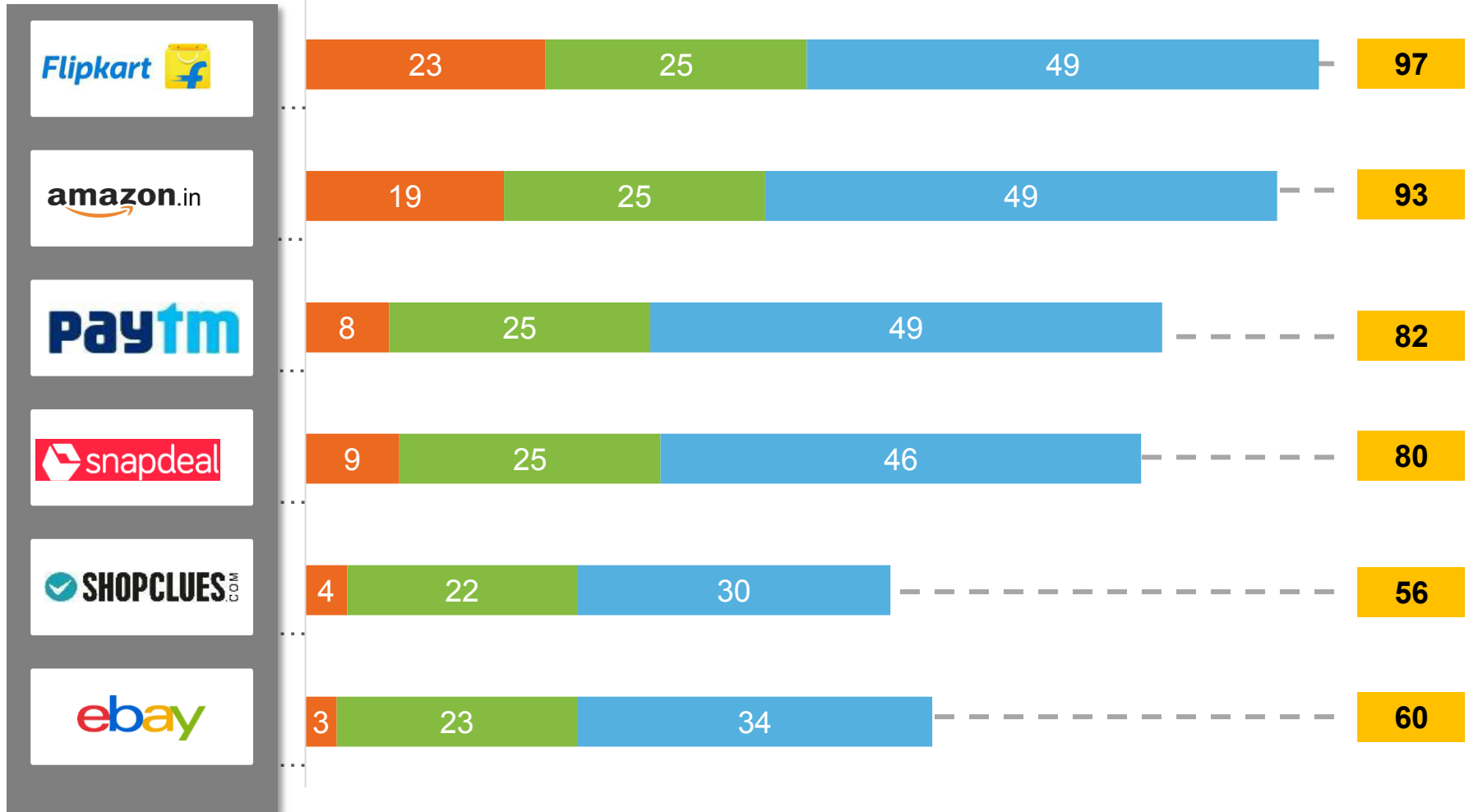
Overall Consumer NPS

¹ Customer Support parameters are measured as Average Wait Time (Secs), First Time Resolution & Escalation

Player-wise Performance

Q4 2016

■ Most Trusted Brand ■ Best Value ■ Great Experience



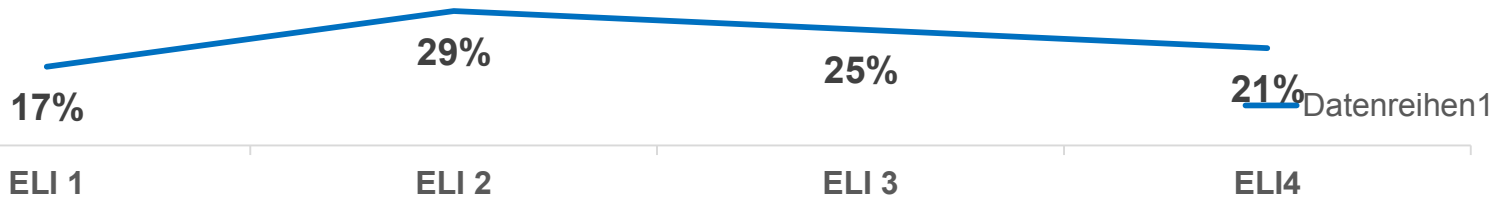
Overall Industry Trends: Q3 to Q4

Up from Q3







Same as Q3

Down from Q3

- The industry has moved downward over the last quarter, largely due to the effect of de-monetisation and post festive-lull
- De-monetisation affected the business of e-commerce players drastically in the month of November, clearly reflected in the decrease in NPS scores



Rationale

				<ul style="list-style-type: none"> Flipkart is still at the top with almost no change from Q-3. Brand Recall has seen a slight increase, and post delivery experience seeing a decline.
				<ul style="list-style-type: none"> Amazon is at second place, but has seen a slight decline in Brand Recall and post experience delivery which has led to decrease in scores
				<ul style="list-style-type: none"> Paytm has been the biggest gainer among all e-tailers this quarter, with de-monetisation having a positive effect on most parameters
				<ul style="list-style-type: none"> Snapdeal has improved significantly in this quarter, largely due to improved brand recall and increase in post-delivery experience
				<ul style="list-style-type: none"> Shopclues dipped a bit in the scores in this quarter, largely due to post-delivery experience, where the performance has dipped.
				<ul style="list-style-type: none"> Ebay marginally improved on it's rating in the previous quarter with improved post delivery experience and has gone above Shopclues on the index.

Notes:

1. Only the horizontal e-tailers have been considered for this study
2. For Pillar A – Higher weightage has been given to "Top of the Mind Recall" over the "Unaided Recall"
3. For Pillar B – Price Competitiveness has higher weightage than Product Variety and Availability
4. For Pillar C – App has been given higher weightage when compared to App given that a larger customer base buys using the App



Thank You !

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