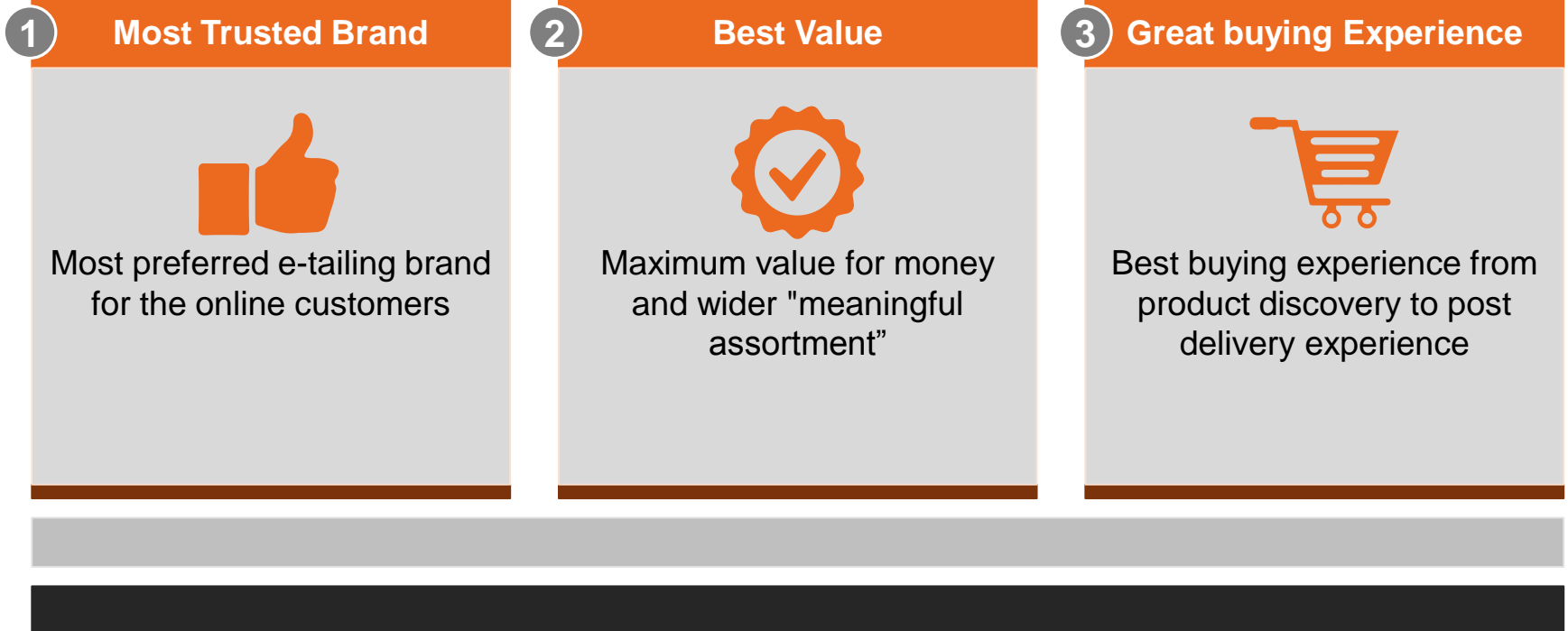


What does e-tailing Leadership Index (ELI) measure?

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



The brand which is most trusted by online consumers.



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



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



How is it structured > Best Value



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

- Price competitiveness
 - Where would you find the cheapest product you are looking at
 - All the time, and as a median of the pricing
- Product variety and availability
 - What are the chances of finding the product you are looking at among the e-tailers
 - What are the chances of e-tailer/seller being able to ship the product (without being out of stock/cancelled)



How is it structured > Great Buying Experience (1/2)



Which e-tailer gives best end to end buying experience



- **Exploring and ordering products (For web and 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



How is it structured > Great Buying Experience (1/2)



Which e-tailer gives best end to end buying experience



- **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

3000 customer survey across 30 cities (Metro Tier-I and Tier-II) in April to June period

2

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

Tracking performance of 6000 orders over the April to June month

5

Tracking the prices of 600+ Mobile phones and large goods across the website

6

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

Not applicable to this study. Drop?

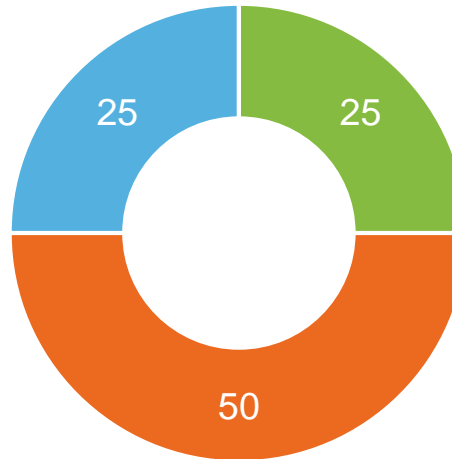
Evaluation Parameters and Weights

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

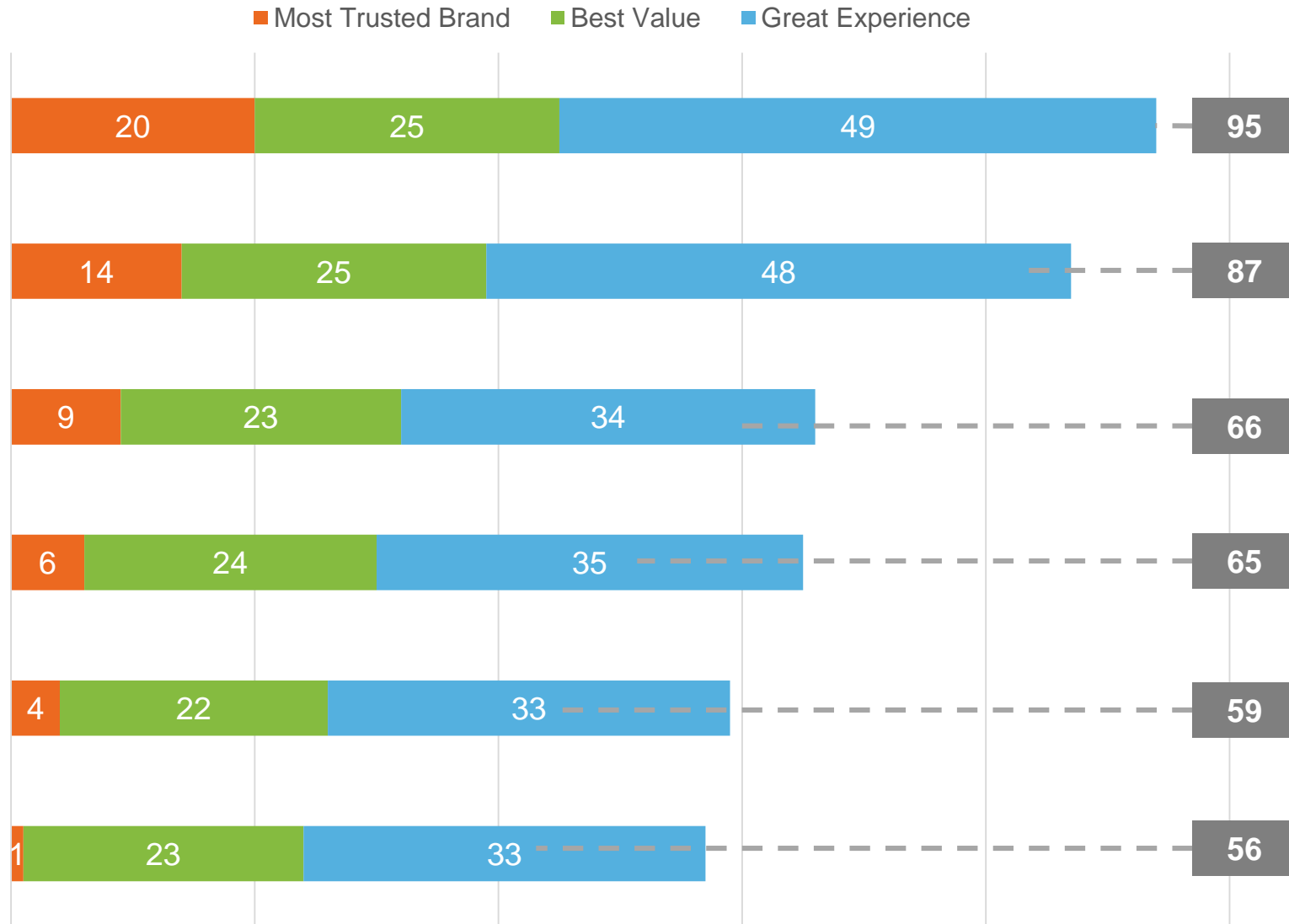
Overall Consumer NPS

Changes in methodology

- Study is entirely based on consumer perception
- The ranking methodology is based on proprietary RedSeer algorithm

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

Performance of Horizontals e-tailers on Leadership 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

Customer satisfaction with e-tailers



Happy with

- Delivery
- Overall online shopping experience



Can live with

- App and Web experience
- Pricing and Discounts
- Product Variety
- Product Availability
- Product Quality



Concerned with

- Post Delivery Experience
- Customer Support

E-tailer performance vis-à-vis previous Study



- Retains highest Brand Recall from last ranking
- Emerges leader with highest improvement in App experience and Customer NPS



- Retains leadership overall customer NPS and Web & App Experience
- Needs to improve on the refund speed



- Does well in speed of delivery and ease of return
- Needs to improve n overall customer experience



- Does well on pricing and discount
- Needs to improve on web experience



- Most improved e-tailer in last quarter
- Needs to be improve on consumer NPS



- Outside leaders, good performance in web experience
- Needs to improve on Refund and Returns

In-depth version of the Leadership index

- 1 Cuts of the index by city Tier and demographics
- 2 Ratings by all 30 Parameters
- 3 Benchmarks for the tangible parameters
- 4 Flexibility to play with weights to see performance in various scenarios

Subscription cost for In-depth version of leadership index

One time

Annual (4 Cycles, one per quarter)

US\$ 1,500

(Single License)

US\$ 3,500

(Enterprise License¹)



US\$ 5,000

(Single License)

US\$ 12,000

(Enterprise License)

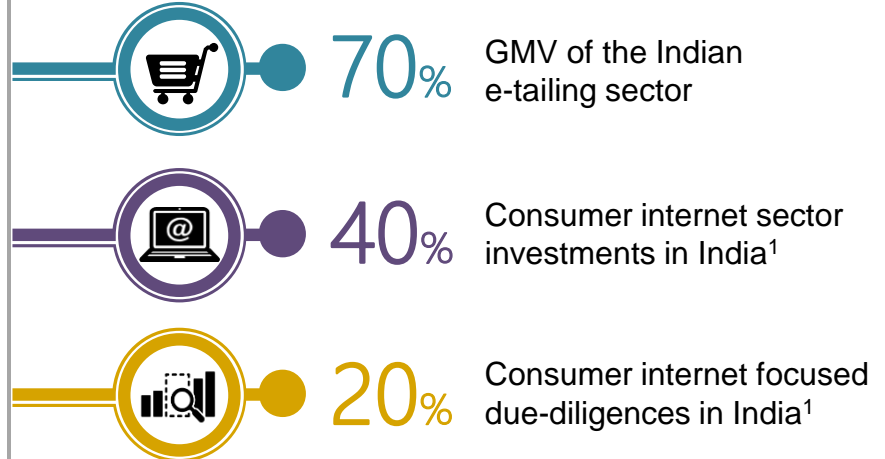
¹ Can be shared with in portfolio companies and across the geographical offices

About RedSeer: We are the leaders in the Indian consumer internet advisory space

We are a research-oriented analytics & consulting firm with strong credentials

- **100+** engagements with funds and new age sector
- **150+** clients
- Executed **1000+** engagements
- Working with **20+** funds across the globe
- **70+** employees across **5** locations
(New Delhi | Bangalore | Mumbai | New-York | Dubai)

We work with industry-defining clientele that account for...



Trusted partners to leading internet companies and investors (sample)

Leading Investors



Largest internet companies



Key Industry Observers



Note 1. For the year 2015



Thank You !

Bangalore Office:

#898 2nd Floor 80 ft Road
Koramangala 6th Block
Bangalore – 560095

Mumbai Office:

25/b 4th Floor
Usha Sadan
Near Colaba PO, Colaba
Mumbai - 400005

Delhi Office:

Inhwa Business Centre
Ground Floor, Iris Tech Park
Sohna Road, Gurgaon,
India - 122002

Dubai Office:

42Seer Technologies FZE, G-D-
Flex G089 C-Thub, Dubai Silicon
Oasis, Dubai, UAE