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**A** Quarterly Results – Q3'17

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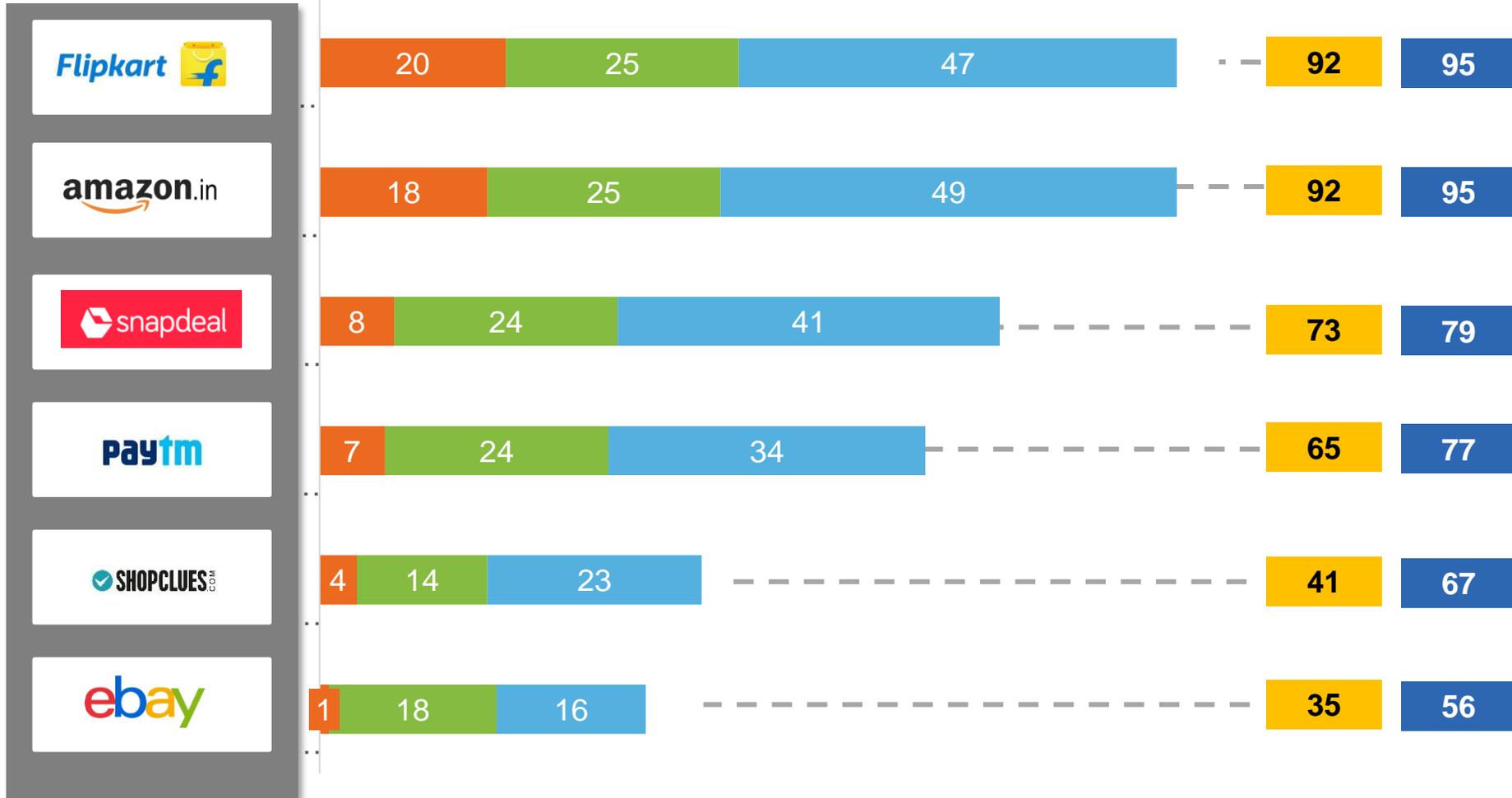


# Player-wise Performance

Q3CY'17

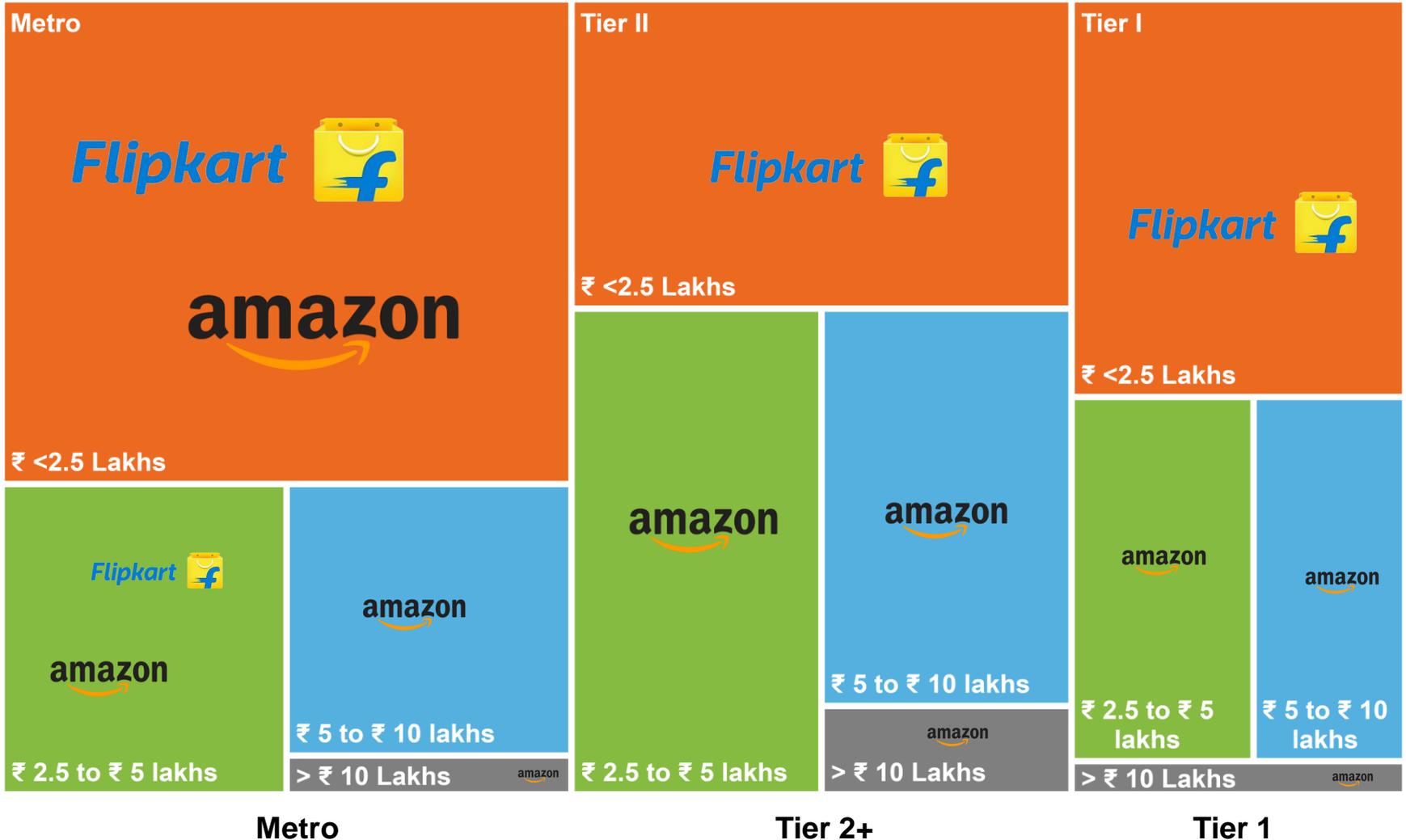
Q2CY'17

■ Most Trusted Brand 
 ■ Best Value Proposition 
 ■ Great Experience



**Note:** A difference of <0.5 in scores is declared a tied position

# Segment-wise ELI Leaders



**Note:** A difference of <0.5 in scores is declared a tied position

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Quarterly Results – Q3'17

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ELI methodology



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

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

## Indian E-tailing Leadership Index

1

### Most Trusted Brand



Most preferred e-tailing brand for the online customers

2

### Best Value



Maximum value for money and wider "meaningful assortment"

3

### Great Buying Experience



Best buying experience from product discovery to post delivery experience

# 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



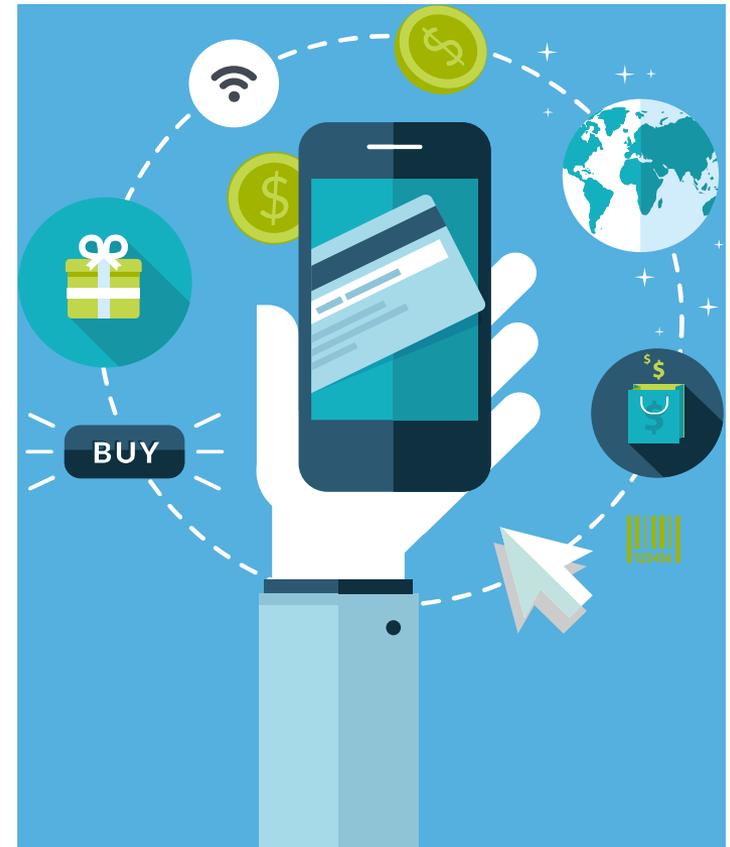
- **Delivery predictability and experience**
  - How quick and precise is the overall delivery
  - How quick is the reverse pick-up in case of returns



- **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 July to September 2017 period

2

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

3

The surveyed sample population data was weighted to represent the actual e-tailing universe

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

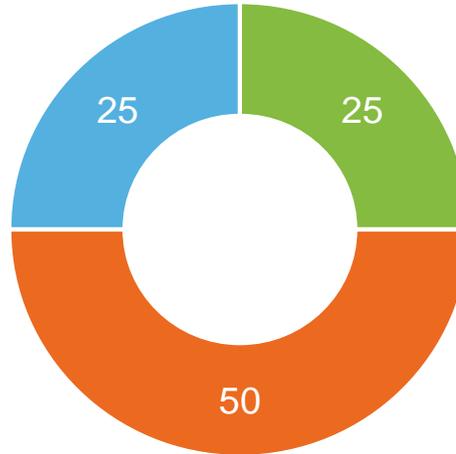
# Evaluation Parameters and Weights

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

### Delivery

- Refund (Days)
- Customer Support<sup>1</sup>
- Ease of Return

### Overall Consumer NPS

### Consumer Experience Post

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

# Notes

## 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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