E-tailing Leadership Index (India)

7th Edition

July, August, September 2017

New Delhi I Bangalore I Mumbai I New York I Dubai

RedSeer|Consulting

Contents

Player-wise Performance

■ Most Trusted Brand ■ Best Value Proposition ■ Great Experience

Brand	Most Trusted Brand	Best Value Proposition	Great Experience	Q3CY'17	Q2CY'17
Flipkart	20	25	47	92	95
amazon.in	18	25	49	92	95
snapdeal	8	24	41	73	79
Paytm	7	24	34	65	77
SHOPCLUES	4	14	23	41	67
ebay	1	18	16	35	56
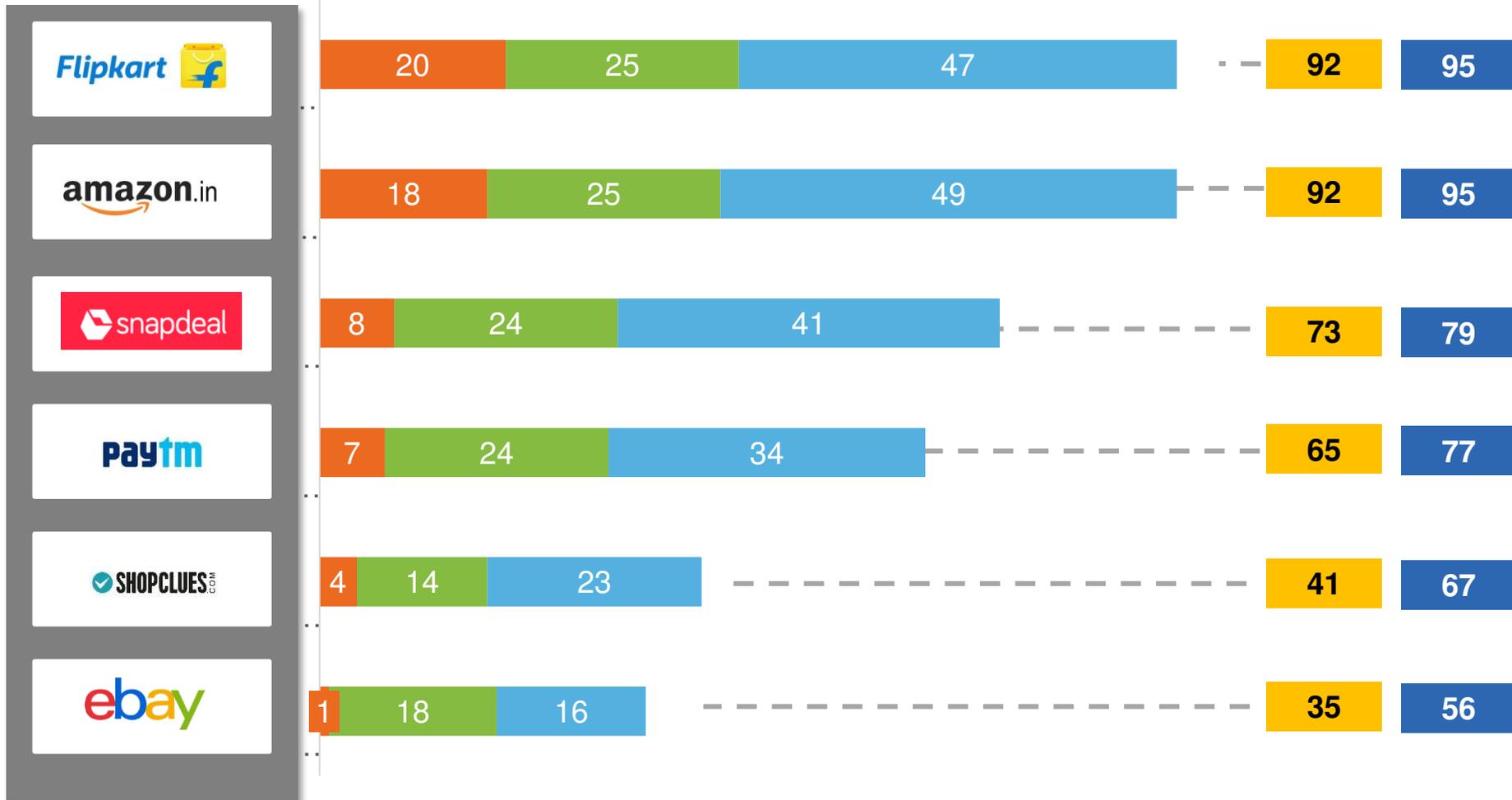
Note: A difference of <0.5 in scores is declared a tied position

Segment-wise ELI Leaders
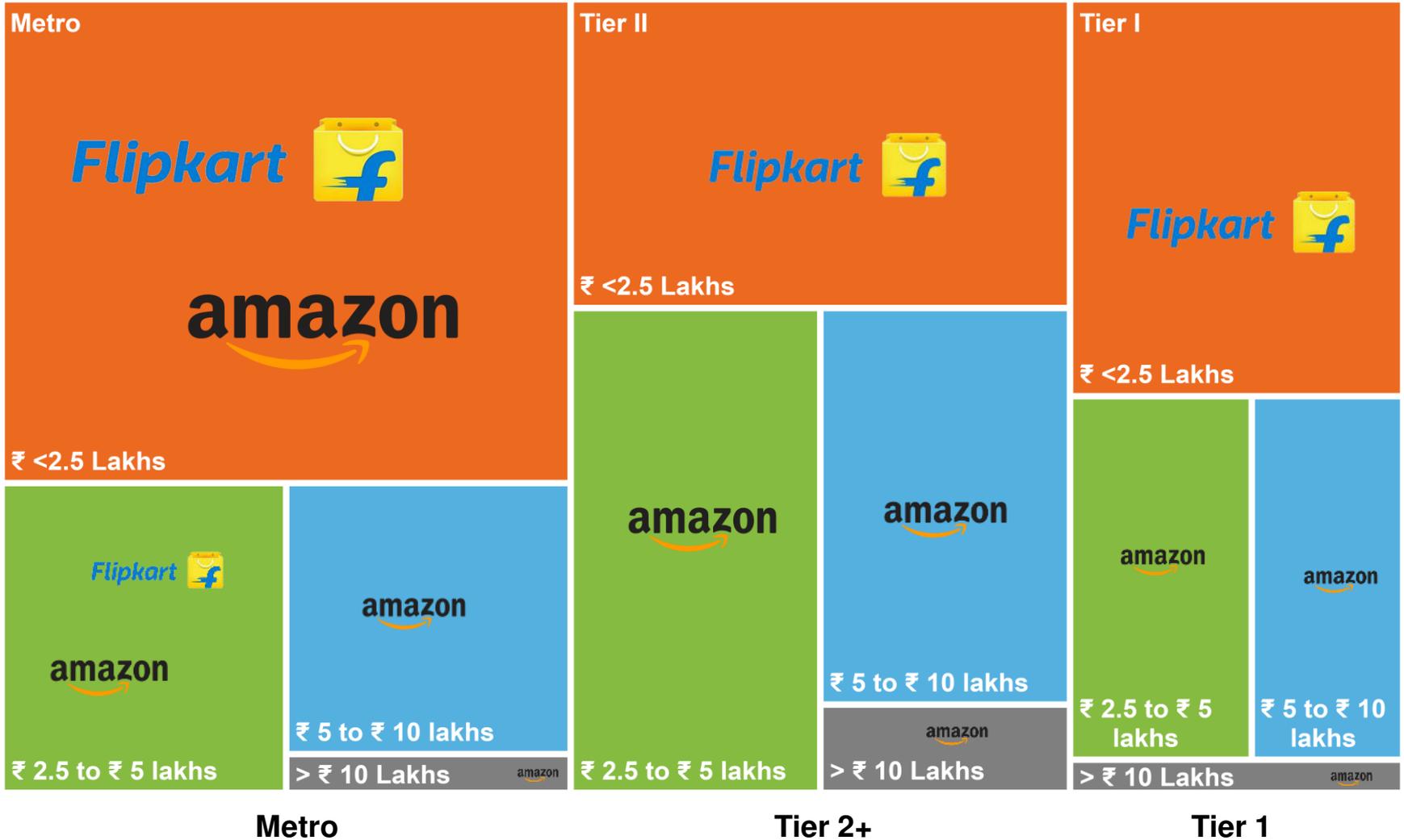
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Contents

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 thing 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
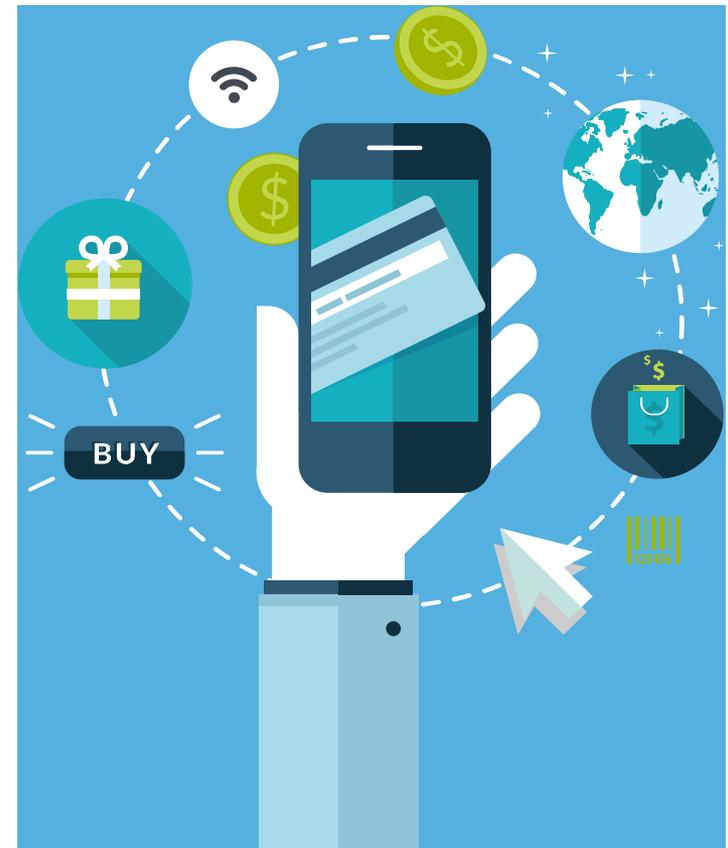
Methodology Used:

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
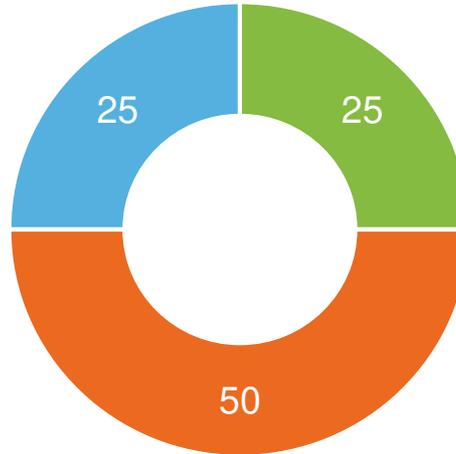
B. Best Value Proposition:

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[1]
- 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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