

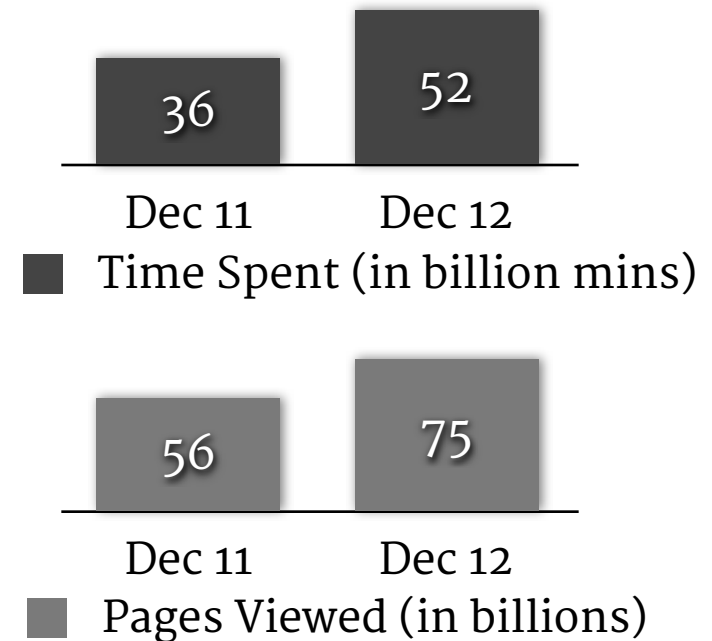
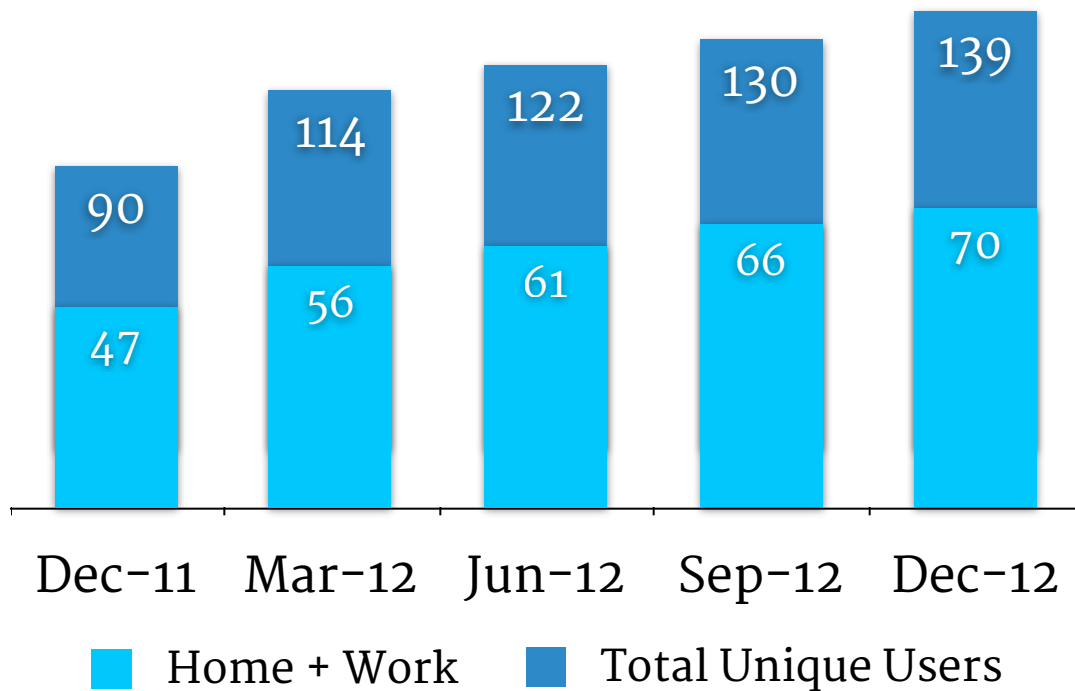
# Indian eCommerce : Landscape & Trends

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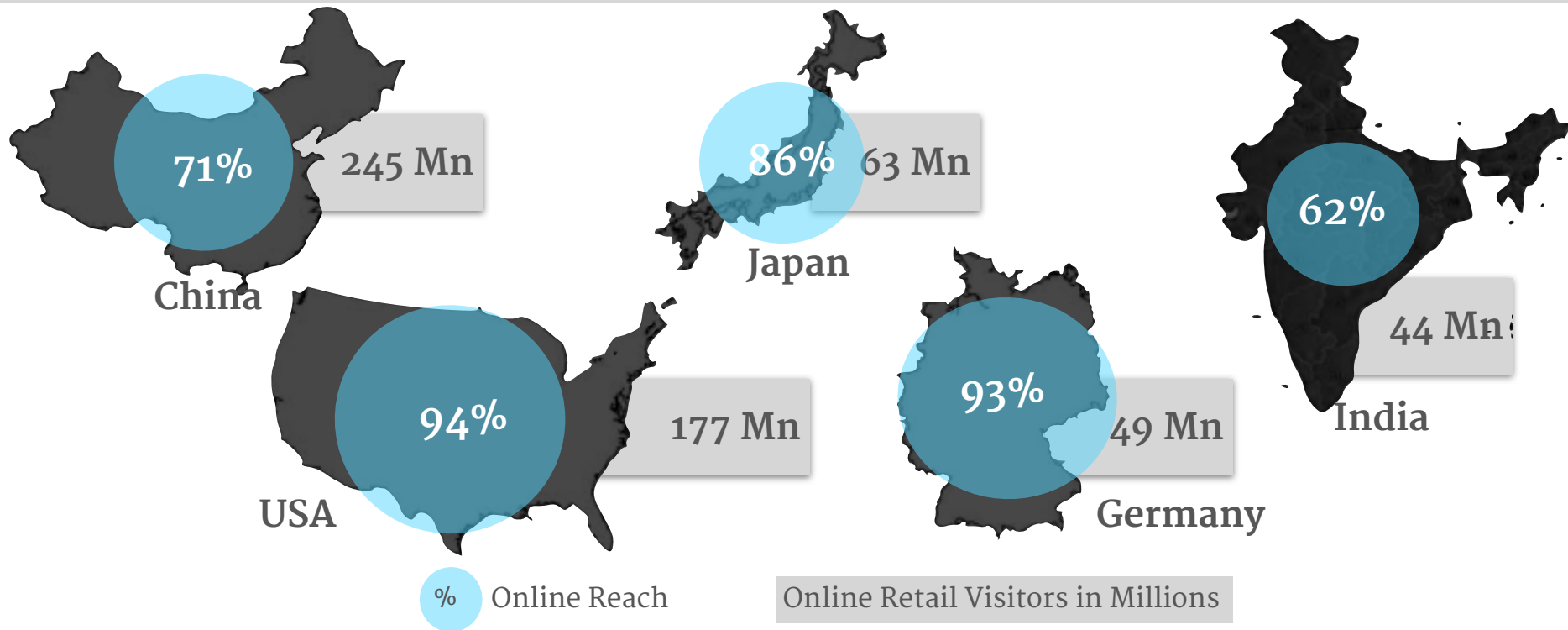


# Online Users achieve a critical mass in India



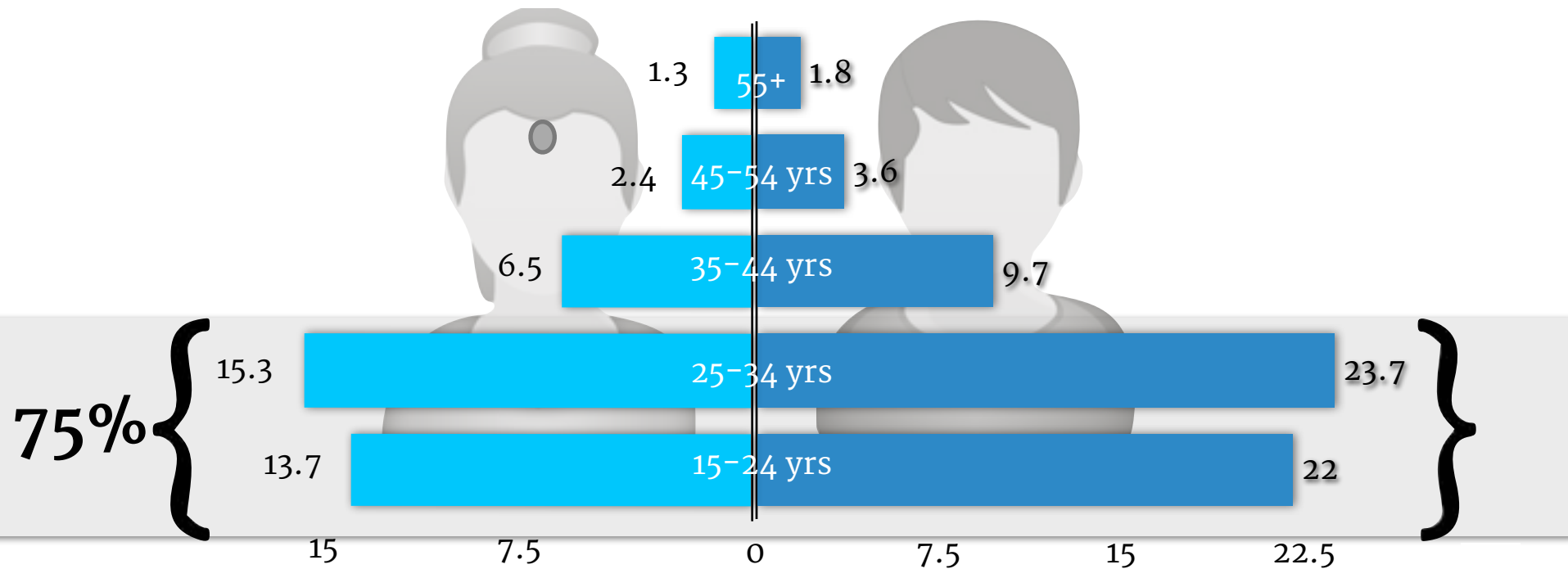
- Total internet user base grew to 139 million in Dec 2012, a 50% growth from last year
- Engagement metrics grew proportionally with additional user growth.
- More devices, touch-points increasing content consumption

# Online Retail penetration: Comparison



- India is 5th largest e-commerce market in terms of visitors to Retail categories
- 62% retail category penetration, compared to a global average of 74%
- Fastest growing category, adding over 15 million users in last 12 months.

# Online Demographic Profile : Growth Catalyst



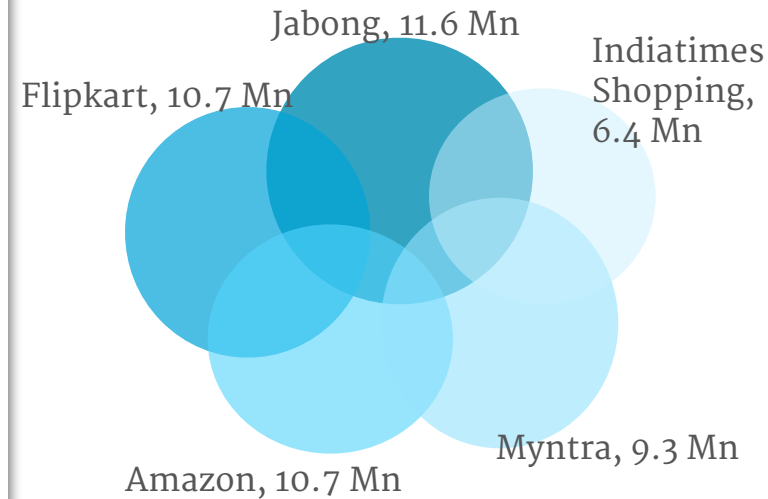
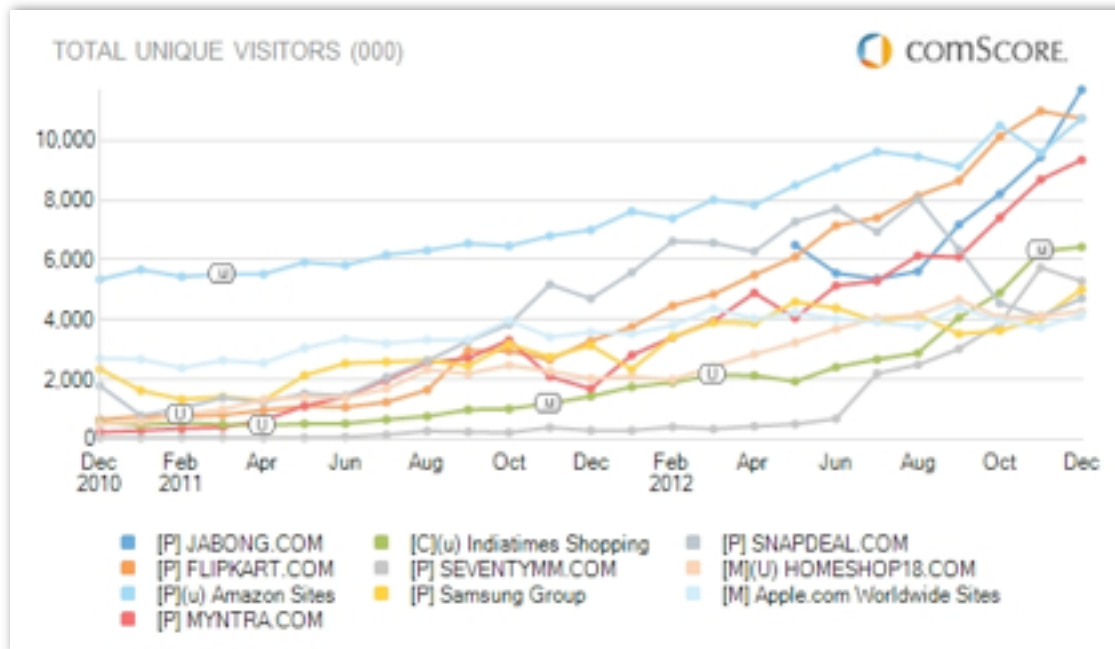
- 75% of Indian online users are below the age of 35 yrs.
- 60/40 Male Female ratio is consistent across retail category
- Visitor loyalty has increased, averaging 6 visits per month
- 35-44 yr segment shows highest usage, younger segments add the bulk of users

# Online consumption among Retail visitors



- Social Networking and search act as entry points to retail sites, showing higher overlap
- Portals and Entertainment sites are also popular among retail users
- More than 70% consume Business/Finance, News and web-mail.
- Online retail reach is 1.5 times more than online travel

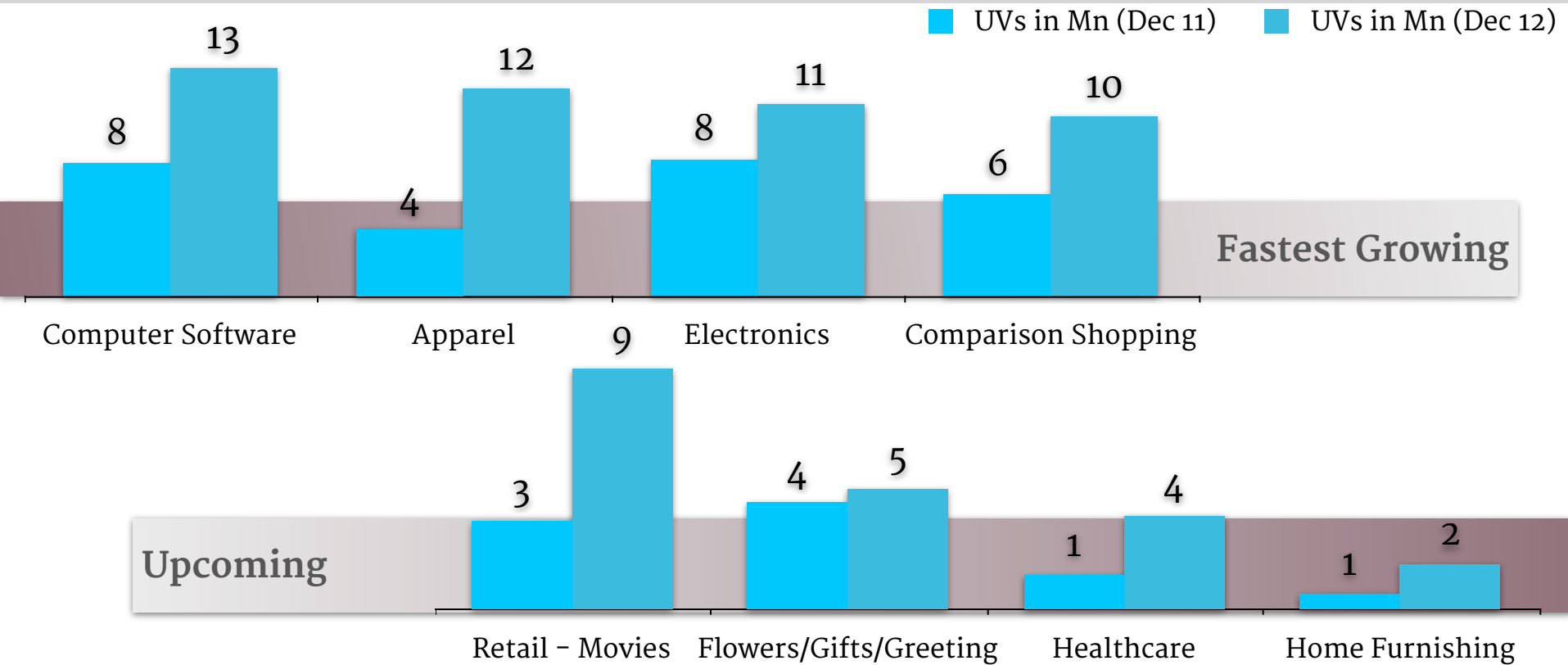
# Top Retail Sites : Comparison



## Duplication of Unique Visitors

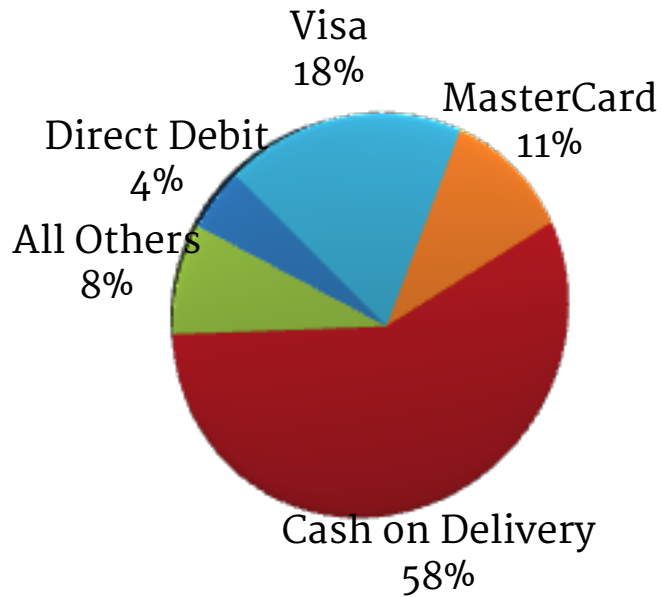
- Most of the top 10 players include horizontals and multi-category retailers
- Jabong is the most visited retail site followed by Flipkart and Amazon
- A reach of 26 Mn among the top 5 retailers, showing deeper penetration among others
- Aggressive marketing, promotions and category expansion has led to this growth

# Top Retail Sub-categories

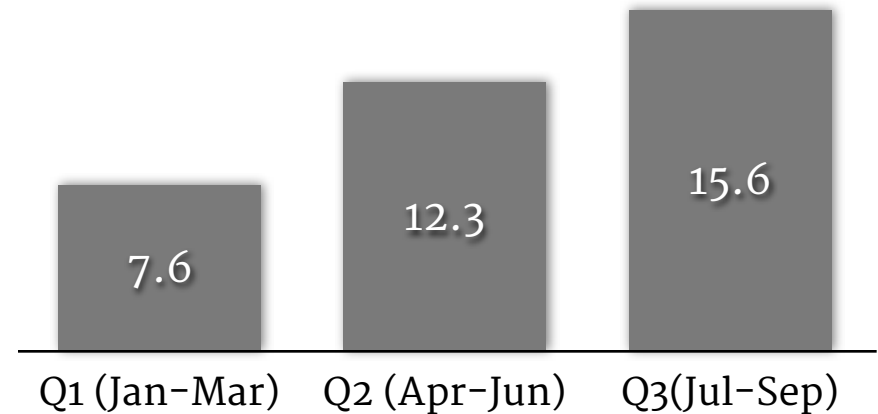


- Apparel is the fastest growing sub category among all online categories, 208% growth
- Electronics and comparison shopping have reached sizable audience
- Home Furnishing, Healthcare and Retail- Movies have shown over 100% growth

# Transactions : Payment Types



■ Retail as % of total Transactions



## Payment Types by Volume

- Cash/COD continues to dominate, but early signs of reduction in COD revenues
- Avg retail transaction size has fallen from \$40 to \$36 in 3 months
- Retail transactions grew over 2X in 9 months in 2012 and are expected to contribute over 20% this quarter



# Online Shopping Experience Customer Study

## DELIVERY



Knowing the **DELIVERY TIME ESTIMATE** ranked among the top factors influencing online shopping.

**42% OF ONLINE SHOPPERS HAVE ABANDONED THEIR SHOPPING CARTS** because of delivery dates



**1/3 OF SHOPPERS** most often choose to **PAY A FEE** for faster delivery



**2/3 OF PEOPLE**



choose the most economical shipping option most of the time

But **43%** expect to see the availability of **2-3 DAY DELIVERY**



And **30%** expect to see the availability of **OVERNIGHT SHIPPING**



## RETURNS



Shoppers appreciate the availability of an **EASY-TO-UNDERSTAND RETURNS PROCESS**



**63%** of online buyers **LOOK AT THE RETAILER'S RETURN POLICY** before making a purchase



**ALMOST HALF** would shop more often with a retailer and would be more likely to **RECOMMEND TO A FRIEND** if the retailer had a lenient and easy-to-understand return policy



## SHIPPING SERVICES



**46%** said that **RECEIVING THEIR PRODUCT WHEN EXPECTED** led them to recommend the online retailer



**75%** of shoppers believe **EVERY RETAILER SHOULD OFFER TRACKING INFORMATION**



**CONSUMERS LIKE RECEIVING e-mail alerts**, having the ability to reroute and the ability to schedule a 2-hour delivery window

# The comScore Story

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**NASDAQ**

SCOR



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**Employees**

1,000+



**Headquarters**

Reston, Virginia, USA



**Global Coverage**

Measurement from 172 Countries; 44 Markets Reported



**Local Presence**

32 Locations in 23 Countries



**Big Data**

Over 1.5 Trillion Digital Interactions Captured Monthly

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# Thank you.

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