boxmytalk

Social Quotient of E-Commerce Brands (India, 2012)

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Ecommerce Scenario in India

Even though India boasts of an Internet population of 130 million+, the penetration of ecommerce is low as compared to markets like the United States and the United Kingdom. However, it is growing at a much faster rate with new ecommerce stores springing up every other day.

This rapid growth can be attributed to the following facts:

1. Increasing broadband internet (growing at 20% MoM) and 3G penetration

2. Rising standards of living and a burgeoning, upwardly mobile middle class with high disposable incomes

3. Availability of much wider product range (including long tail and direct imports) compared to what is available at brick and mortar retailers

4. Busy lifestyles, urban traffic congestion and lack of time for offline shopping

5. Lower prices compared to brick and mortar retail driven by disintermediation and reduced inventory and real estate costs

6. Increased usage of online classified sites, with more consumers buying and selling second-hand goods

7. Evolution of the online marketplace model with sites like ebay, Infibeam, and Tradus

All these factors have enabled the Indian e-commerce market to leapfrog from $2.5 billion in 2009 to $6.3 billion in 2011. It is projected that the market will be worth $34.2 billion by 2015.

How are Ecommerce Brands using Social Media

All the ecommerce companies have a presence on social media at varying degrees. While some are doing a great job, some are learning and improving while others still haven't decided on any strategy yet.

The social networks most preferred by ecommerce websites are Facebook and Twitter. While a few have a decent presence on Pinterest, only the bigger players are active on YouTube, which can be attributed to the high cost of video content.

Though the ecommerce brandsin India understand the importance of social media and the influence it holds on their target consumer segment which is young, internet savvy and active on social media, they are yet to build long term strategies. Another important factor that the brands realize is the viral aspect of social media interactions and the key role social media plays in influencing decisions and brand perception.

Facebook

Ecommerce brands are majorly using Facebook to build a community around themselves. With an overt reliance on Image updates, the brands are trying to increase their reach by sharing visually engaging content.

The content in most cases is self-promotional through discount offers, coupons and sale announcements. Very few brands are genuinely trying to keep the users engaged.

From cover photos to custom tabs, all promotional aspects of a Business page are being made use of by the brands.

Twitter

Many brands are using Twitter for customer services purposes. A lot of brands have realized that Twitter can become a hot soup if a complaint is not addressed on time. Which is why they have adopted Twitter as their primary customer service channel.

But a good number of them are taking half-hearted measures and are simply using template lines and promotional discount offers. Very few are engaging in interesting discussions or are organizing interesting hashtag campaigns.

YouTube

Only the big brands are using YouTube. Videos being an expensive content channel, are being leveraged by the ones who have bigger marketing budgets.

But even here, most of content is TVCs instead of interesting content. YouTube is being used merely as a TVC hosting platform which is not leveraging the full content marketing power of the channel.

Pinterest

While several brands have leveraged Pinterest, they are unable to generate enough buzz on it. This is primarily because of the reason that Pinterest adoption as a social media platform is still in its nascent stage in India.

The Aim of Ecommerce Report

This report has been created on the social interaction data of around 100 ecommerce Indian brands from September to December 2012, using BoxMyTalk as the social monitoring and analytics platform. The social data across Twitter, Facebook, Google+, Tumblr and 20 major consumer sites has been monitored and analyzed on various important social metrics to assemble this report. The primary objective is to bring out a comprehensive and insightful social media report on ecommerce industry in India.

Following are the aspects that what we have tried to explore through our research:

Customer Satisfaction
Customer Sentiment
Follow-up by Brands
Followers
Category Specific Sentiment
    Delivery
    Customer Support
    Brand Perception
Brand Affinity
Most Engaging Tweets

Research Methodology

Around 100 ecommerce brands in India were monitored from October 2012 to December 2012 on Twitter, Facebook, Google+ , Tumblr and 20 major Indian consumer sites.

Over the course of this period, approximately 1.5 Million social mentions were monitored, tagged and analyzed in BoxMyTalk on various social metrics which are presented in this report. An attempt was made to normalize the scores and rank the top 10 brands in each social parameter.

Following are the Key Metrics that we monitored:

Customer Satisfaction Score

Customer Satisfaction Score is the measure of consumer satisfaction based on direct interaction between consumers and brands. We analyzed all the mentions from customers regarding feedback, reviews, complains and customer service, and the sentiment strength and type (positive, negative and neutral) of these conversations.

Sentiment Score

Sentiment Score is based on all social mentions about the brand, excluding all offers and promotional campaigns. This metric is a measure of the overall sentiment of the brand on social media platforms.

Follow-up by Brands

Follow-up by brands is based on the conversations that took place between the customers and brands on social media platforms.

Follower Index

Followers Index is based on the change in follower count of Brands.

Category Specific Sentiment

Delivery

Based on the social mentions about the delivery services of a particular brand.

Customer Support

Based on the social mentions about the customer support services of a particular brand.
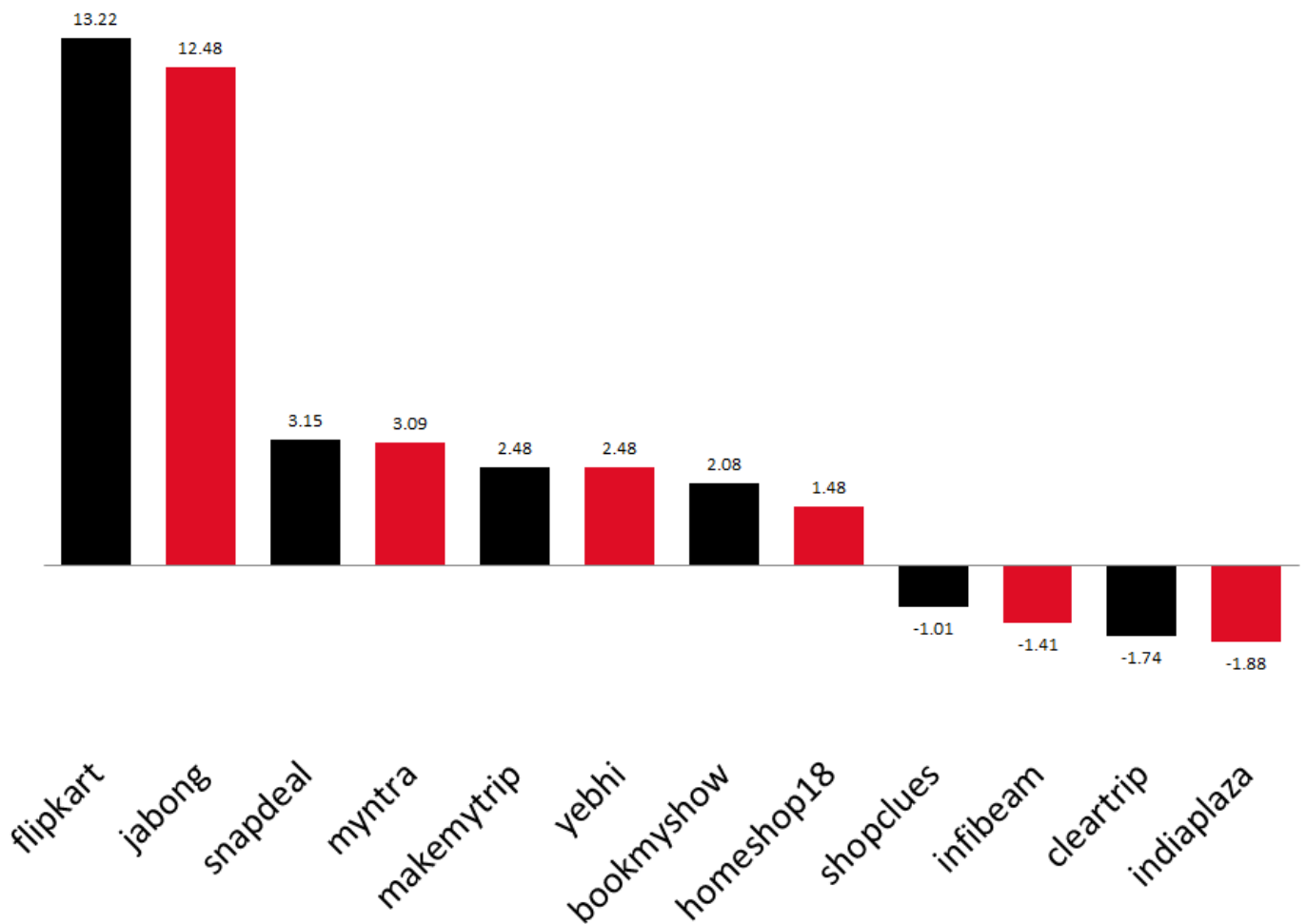
Brand Perception

Based on the social mentions about the particular brands, including news, offers and pricing.

Brand Affinity

Based on the social mentions where two or more brands are mentioned / compared.

Customer Satisfaction Score

1 flipkart.com **2** JABONG COM **3** snapdeal.com

13.22 | 12.48 | 3.15 | 3.09 | 2.48 | 2.48 | 2.08 | 1.48 | -1.01 | -1.41 | -1.74 | -1.88

flipkart | jabong | snapdeal | myntra | makemytrip | yebhi | bookmyshow | homeshop18 | shopclues | infibeam | cleartrip | indiaplaza

We monitored a total of 7,889 conversations people had with respective ecommerce brands. Out of the conversations, 1490 were positive in nature while 977 & 5422 were negative and neutral respectively.

Customer Satisfaction Score

As you can see from the bar chart, Flipkart and Jabong have done a stellar job at satisfying its customers while Indiaplaza and Cleartrip are certainly failing at it.

Through its fantastic offline service and superb delivery rates, Flipkart has managed to generate positive vibe from its customers. Another reason behind Flipkart's stellar performance is the way it has adopted social media in addressing consumer concerns. It has taken to social media like a fish to water.

It's communication is quirky and friendly. The way it interacts is like that of a neighborhood friend out to have a good chat on social media.

The ethics and involvement are what drive the brand Flipkart on social media. Also, an effective integration between the social media and offline customer service team is of utmost importance for the resolution of customer queries. And Flipkart has done a good job here.

Now, if we look at Jabong, although it doesn't get as many mentions as Flipkart does, it still ranks high due to its superlative customer service team.

On the other hand, we have ecommerce sites like Indiaplaza and Shopclues which have a poor customer service team handling the queries. There seems to be a communication gap between the online and offline channels which has resulted in non-redressal of customer issues.
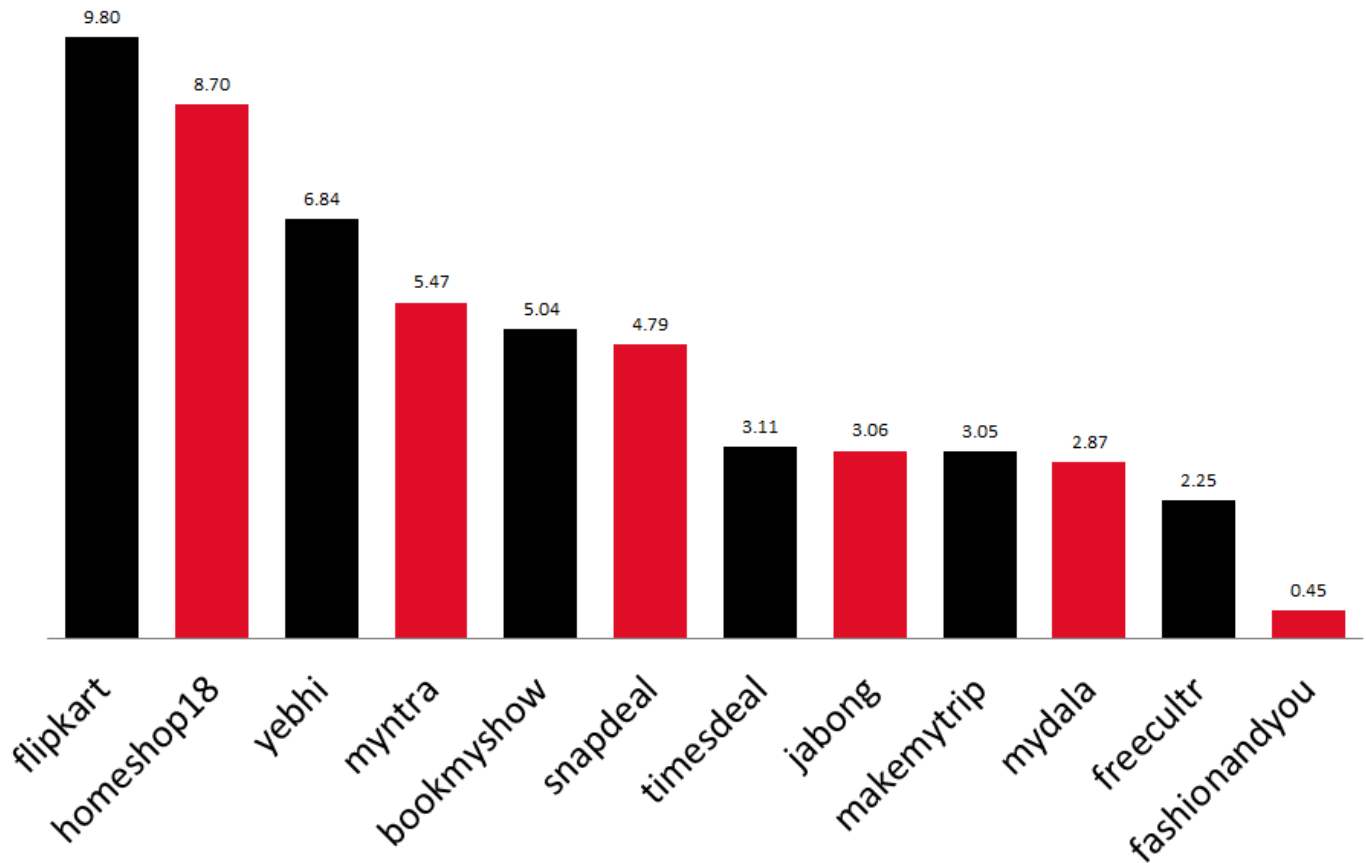
Coupled with this is the poor delivery that has resulted into bad experience for their custom-

ers making them vent out their dissatisfaction on social media.

Brand Sentiment Score

1 flipkart.com   **2** HOME SHOP 18   **3** yebhi.com

flipkart	9.80
homeshop18	8.70
yebhi	6.84
myntra	5.47
bookmyshow	5.04
snapdeal	4.79
timesdeal	3.11
jabong	3.06
makemytrip	3.05
mydala	2.87
freecultr	2.25
fashionandyou	0.45

In all we monitored 84,422 brands mentions out of which 14,590 were positive and 4,132 were negative. Out of all the ecommerce brands we kept a tab on, following are the ones who fared the best.

S H A R E

Brand Sentiment Score

Flipkart ranks on top here followed closely by homeshop18, yebhi and myntra. This score is a measure of the overall sentiment of the brand and Flipkart does a stupendous job at engaging positively with its community.

It asks questions, offers suggestions like a friend and spreads the festive spirit in it's own creative way.

this unique style of engagement strategy has made people resonate with it with a positive association.

On the other hand, HomeShop18 is also commanding a good net positive score. But its strategies are slightly different.

They engage more via deals and offers. Although, we did sideline offers and promotional campaigns while calculating sentiment scores, but they still have some ripple effect.

HomeShop18 has built a strong community that eagerly follows their deals and associates with the brand. They share positive vibes about the brand as it delights them with deals. And this positivity lingers on even after the campaign is over.

Two brands. Two different startegies. Both reaping positive results.

Meanwhile, we have FashionAndYou which is failing to attract much positivity on social media.

If you see the chart, almost all the brands with a higher positive score are bigger than Fashion-AndYou. They serve more customers and hence invite more customer delight.

But FashionAndYou has a big enough community of its own. In fact, it's community on Twitter is bigger than that of HomeShop18!

In that case, what can be the reason for a low positive score? Poor engagement will be your answer.

The content is mostly self-promotional and the only day they see some engagement is on Tuesdays when they hold a #TwitterTuesday contest.
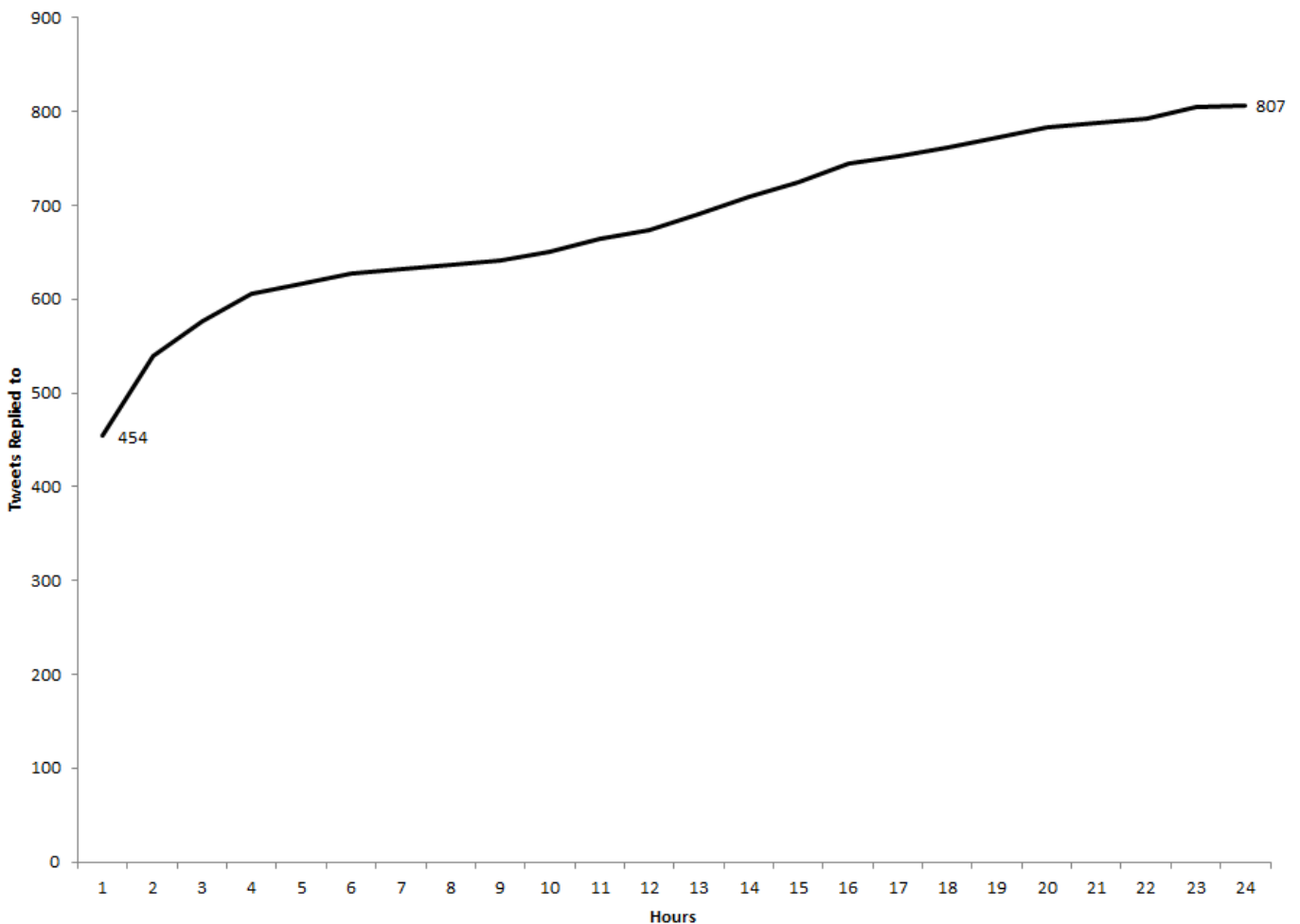
Rest of the week, the content is all bland.

Hence, poor community management coupled with small market size has resulted in a poor score for FashionAndYou.

Follow-up by Brands

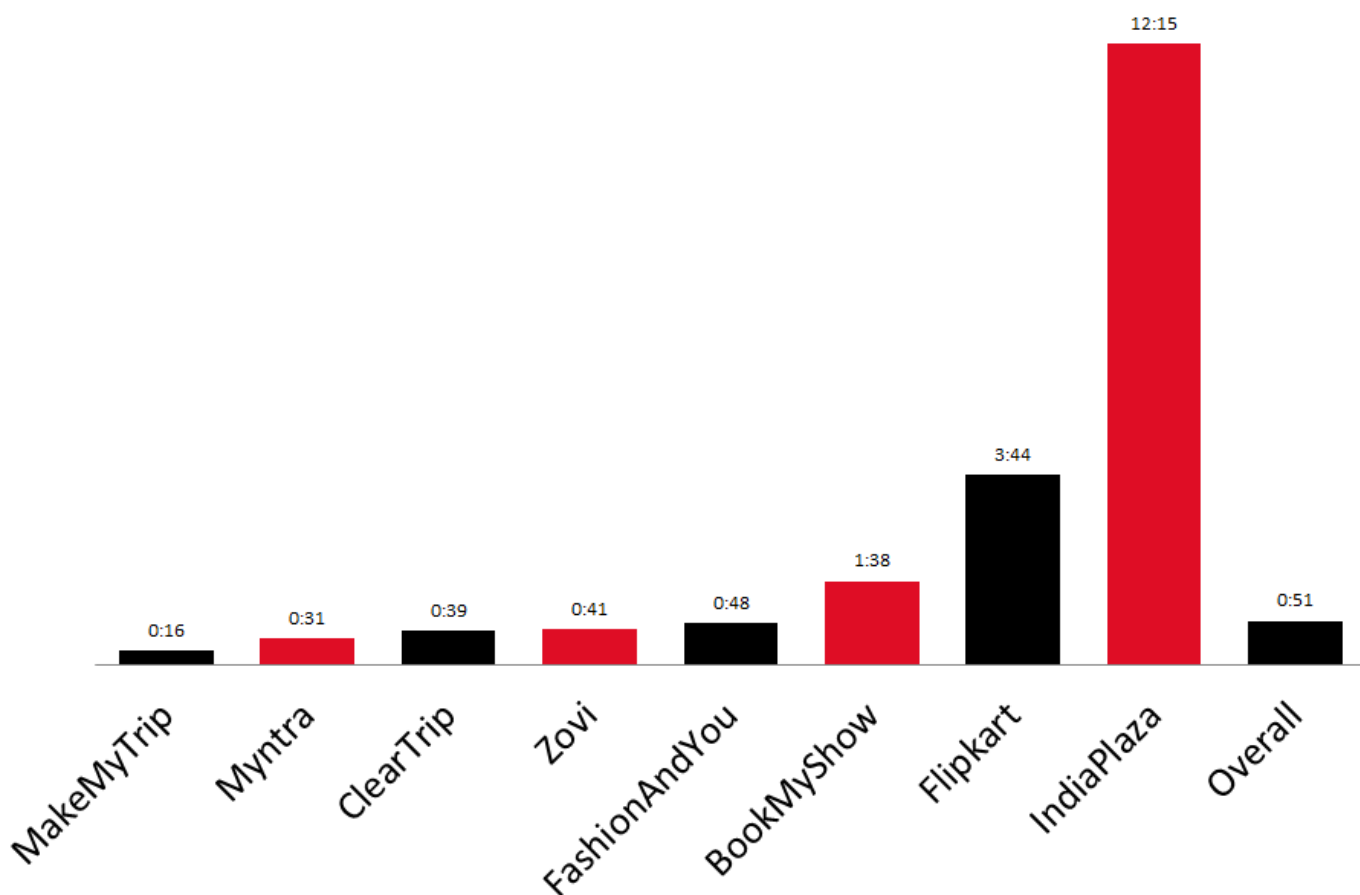

While engagement is necessary for an ecommerce brand to keep the community buzzing, solving customer requires is equally pertinent. When it comes to customer service, agility matters the most, and off late, people have started resorting to Twitter to express their woes. They prefer to tweet instead of calling a toll-free number. This means, your perception on social media will be hugely influenced by your agility in resolving customer issues.

We monitored an average of ~800 customer interaction tweets per day and found that more than half of them were responded to within an hour. The rest received a reply at a much slower rate but very rarely did it take a brand more than a day to respond to one.

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Response Time

1 make**MY**trip.com

2 MYNTRA.com
India's Largest Online Fashion Store

3 cleartrip

0:16	0:31	0:39	0:41	0:48	1:38	3:44	12:15	0:51
MakeMyTrip	Myntra	ClearTrip	Zovi	FashionAndYou	BookMyShow	Flipkart	IndiaPlaza	Overall

An interesting point to note is that overall e-commerce brands have a very good response time and generally reply in less than an hour.

However the brands need to improve on their response rate (number of queries answered.)

S H A R E

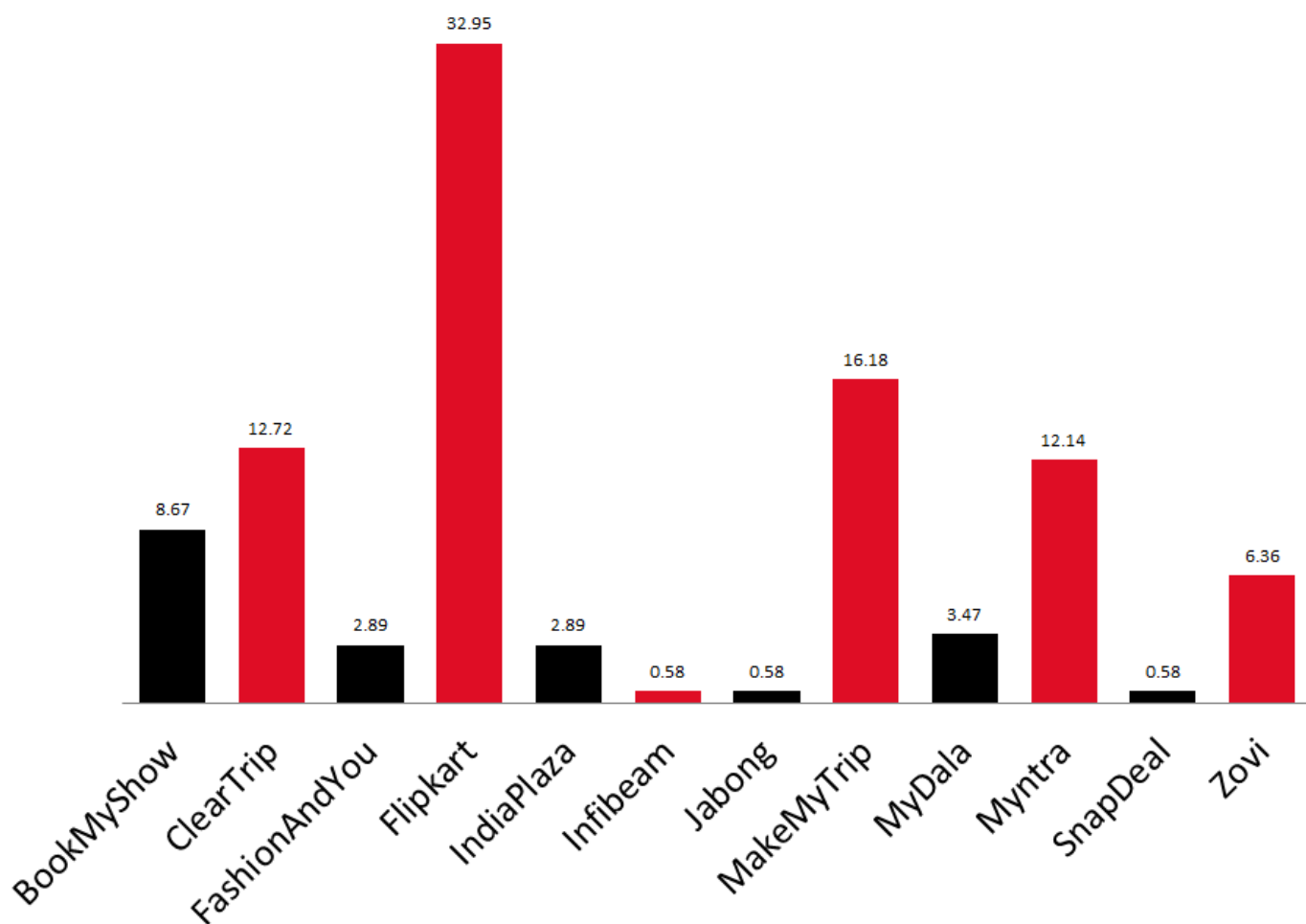# Brand Agility (Score for Under 1 Hour)
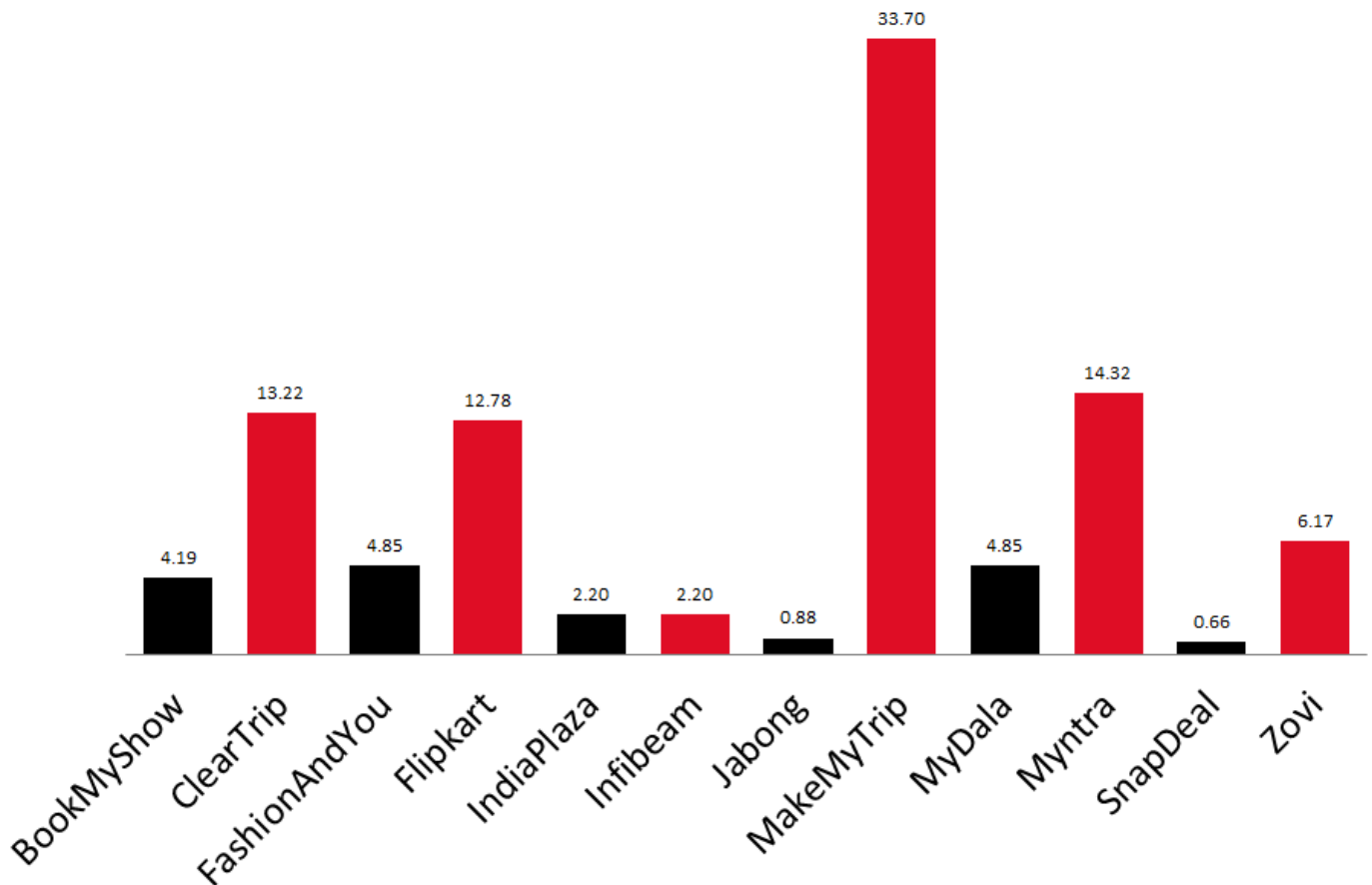
This is a normalized score based on the number of replies by the brand within 1 hour to the total number of replies of all brands within 1 hour. In our research, we found out that about 50% of the tweets were responded to by brands within an hour.

The brands can be divided into three bands. MakeMyTrip is the clear winner by replying to most number of tweets within an hour. Second band comprises of Myntra, ClearTrip and Flipkart which do reasonably well in this category. Last category of brands need to strategize on how to effectively reduce the response time.

Brand Agility
(Score for 1-6 Hours)

This is a normalized score based on the number of replies by the brand between 1 to 6 hour to the total number of replies of all brands within the same timeframe. A customer expects a query to be attended to as quickly as possible. Our research suggest that six hour is a reasonable measure of time, within which a customer expects a response.
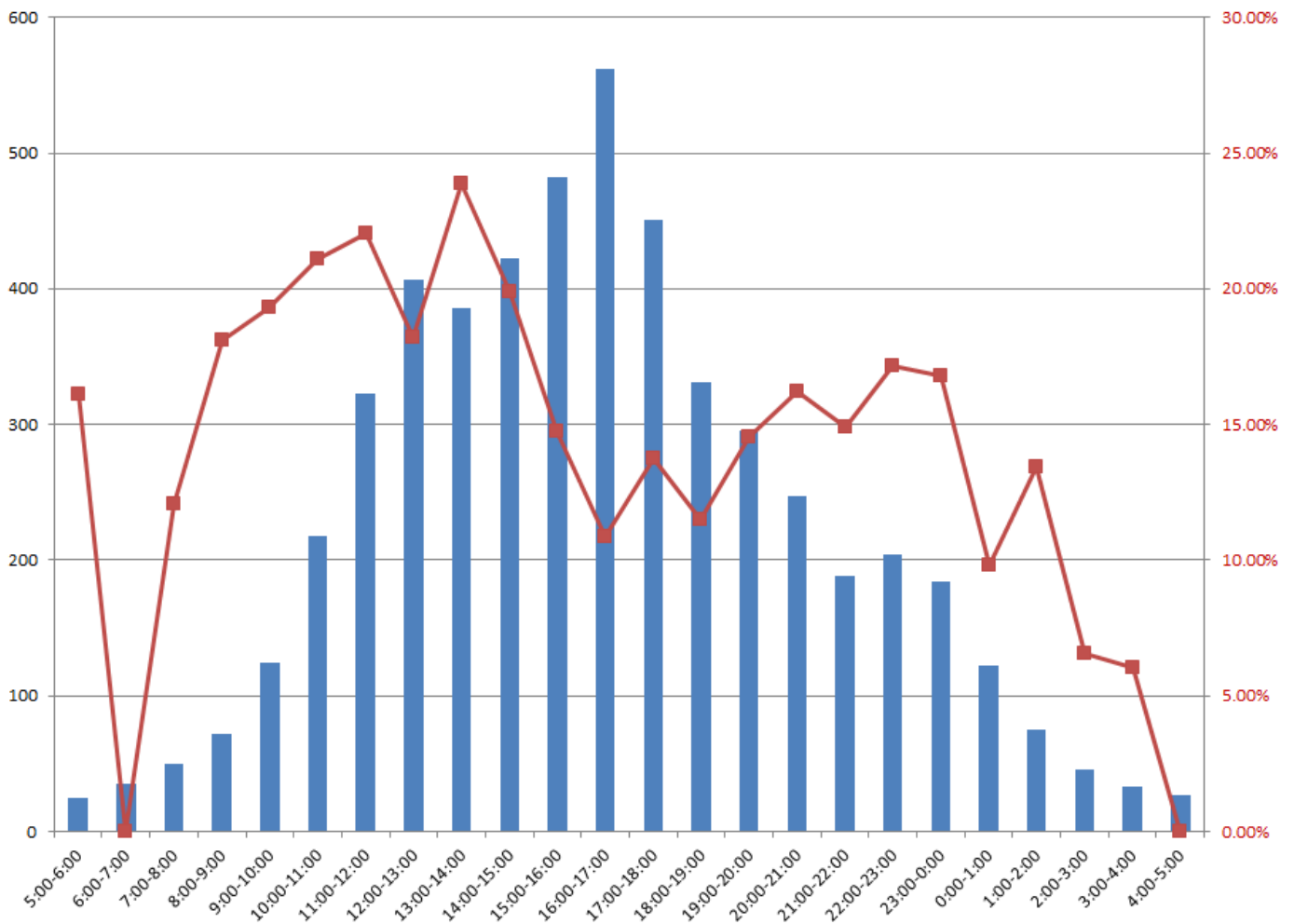
Flipkart tops here, which signifies that they at-

tend to most of their queries within 6 hours. MakeMyTrip sees a major drop in score as compared to under 1 hour category, mainly because of mainly attending to current queries.

The low scores of brand is mainly due to low number of responses.

User Tweets by Time of Day

The bar graphs show the user queries by time of day and the line chart in red shows the percentage of these tweets replied by the brands.

Few inferences that are drawn are:

Users are actively querying brands round the clock, with more than 100 queries per hour coming between 09:00 AM to 01:00 AM, and more than 300 per hour between 11:00 AM and 19:00 AM. Out of these the queries coming between 13:00-14:00 see the highest response rate from brands.

Most of the queries that got answered were tweeted between 11:00 AM and 06:00 PM.

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Brand Replies by Time of Day
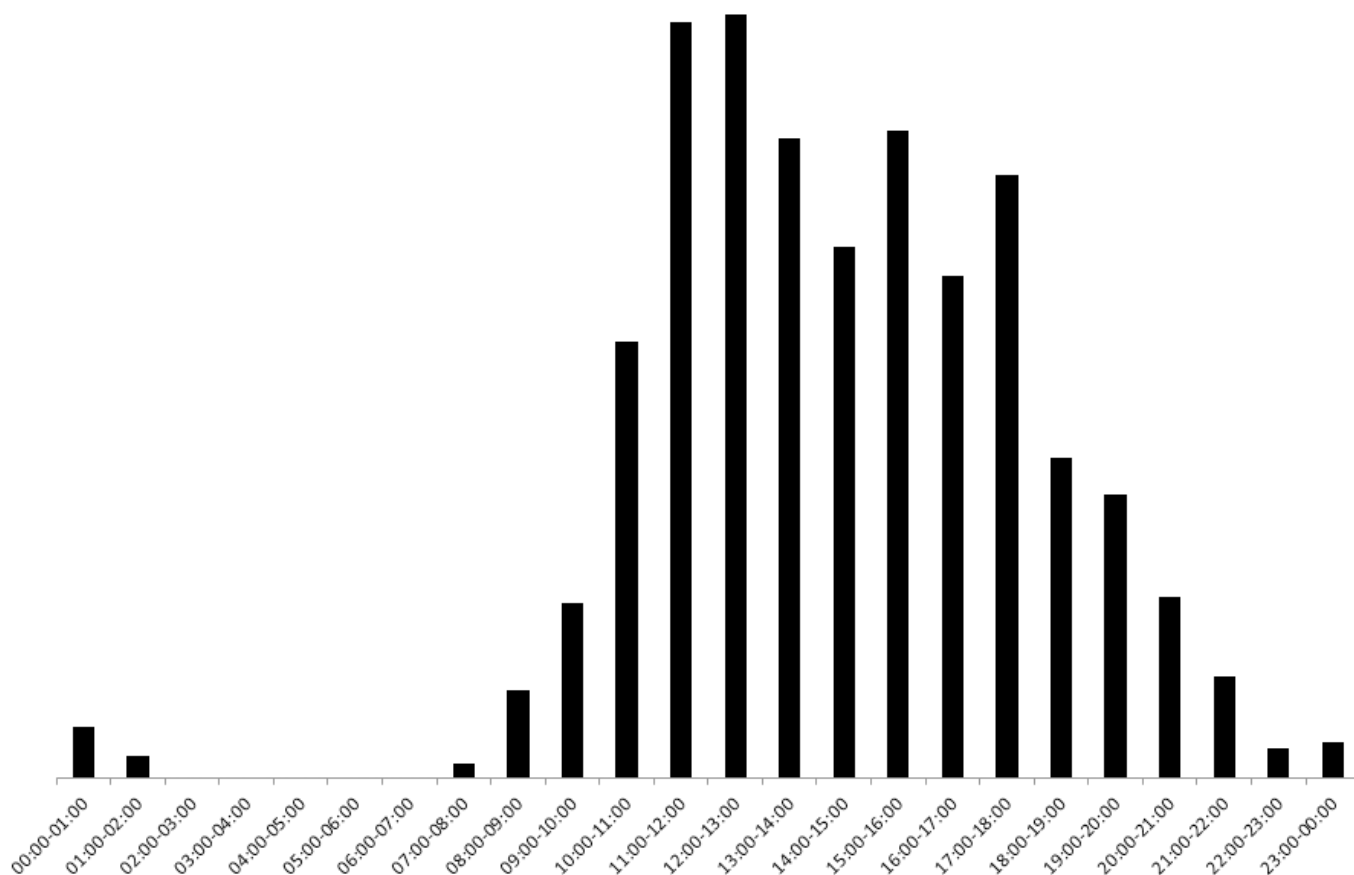
The graphs shows the distribution of Brand's reply with time of the day. In most cases, brands stop responding to users post after office timings. The responses by brands are most during the office hours. This implies, as soon as the office opens, the executives start answering the queries that were posted late in the night after the previous day's office hours got over.

This necessitates the deployment of a 24 x 7 social media customer service channel by brands so they can handle all the queries in real-time leaving no backlog, and hence, generating positivity by resolving customer issues quickly.
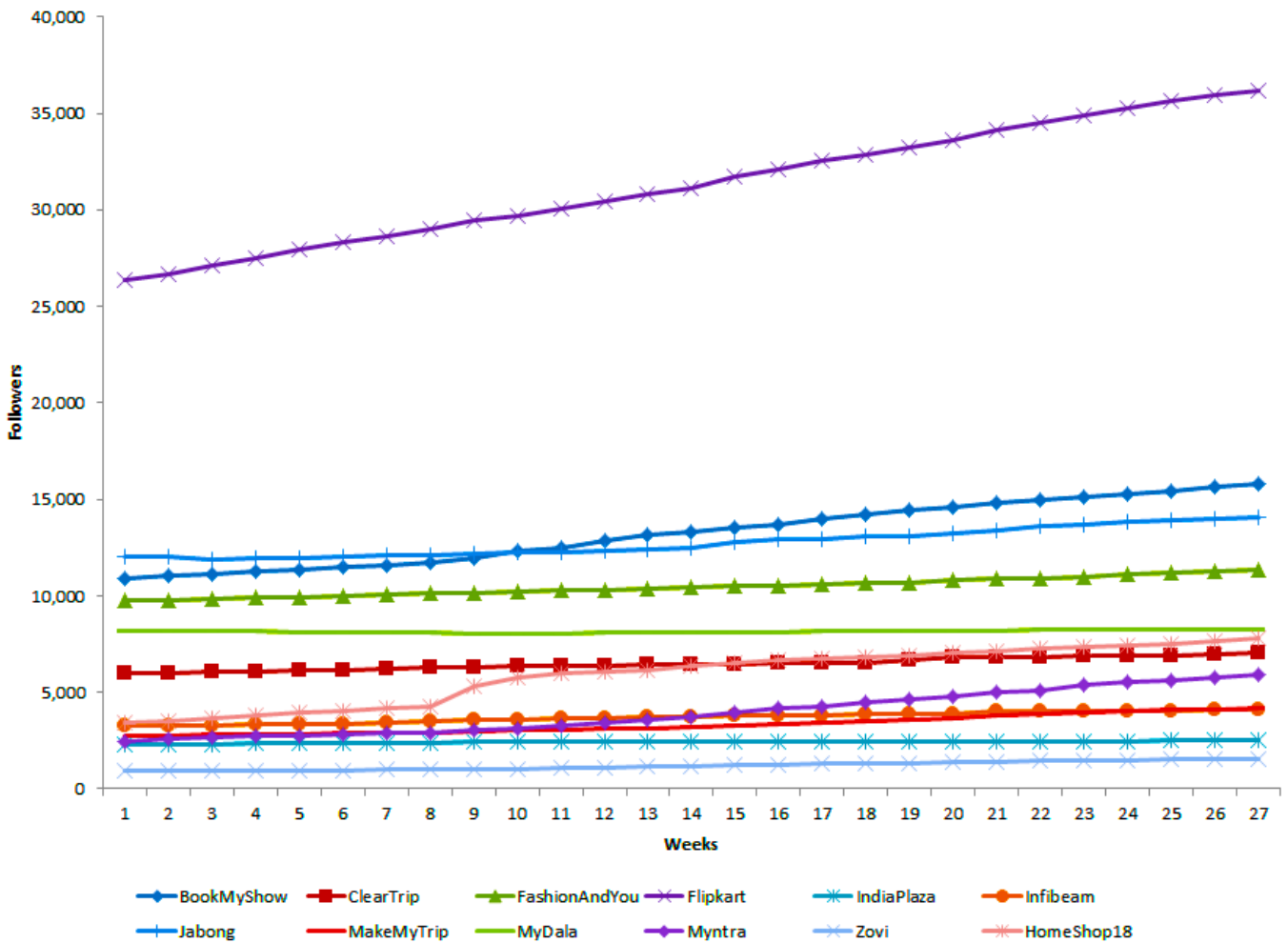
Having a 24x7 customer service channel also enables brands to avoid any crisis because of a complaint that goes viral over night. There have been several such instances.

SHARE

Increase in Follower Count

1 flipkart.com **2** Book my Show **3** JABONG com

The graph shows increase in follower count for different brands over a period of 27 weeks.

While engagement and customer service are a necessary aspect for ecommerce brands on social media, the size of the community matters a lot too. A larger community adds more credibility and ensures wider word of mouth publicity.

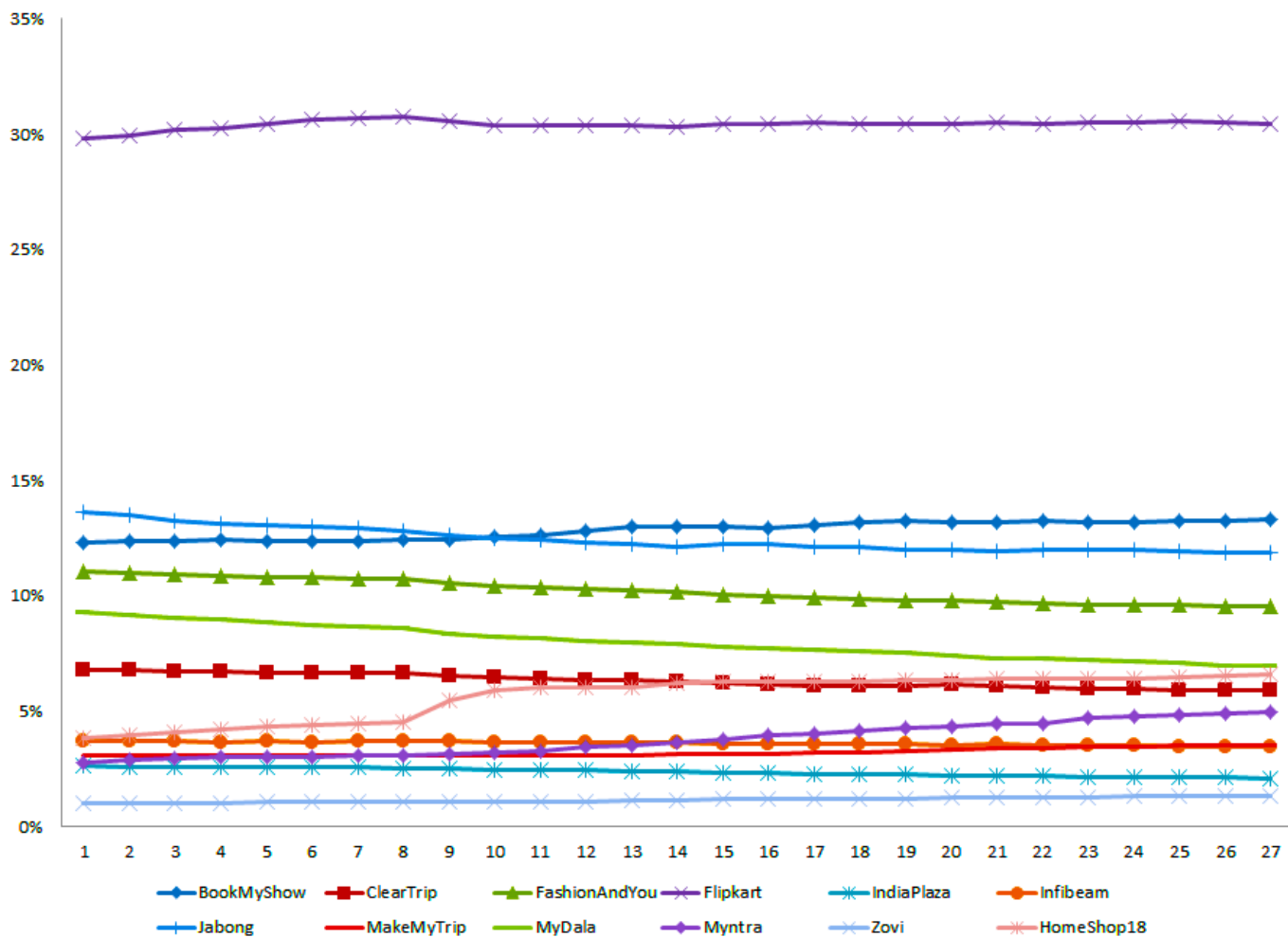Flipkart has the biggest and fastest growing community on Twitter. BookMyShow, Jabong and FashionAndYou have a reasonably good community at well.

On a whole, the follower count has shown a positive increase for most brand.

Copyright © 2013 BoxMyTalk.com

Share of Followers

Legend: BookMyShow · ClearTrip · FashionAndYou · Flipkart · IndiaPlaza · Infibeam · Jabong · MakeMyTrip · MyDala · Myntra · Zovi · HomeShop18

This graph indicates the percentage of followers to total number of followers following different brands on twitter.

New users join social-networking sites every day. Hence a brands community can be said to be growing only when they can maintain their share in this dynamic environment and grow with it.

Flipkart maintains its ~30% share even with new users joining every day. BookMyShow and Myntra show a continuous improvement in their follower share which is indicative of getting better at managing their social-media image and attracting more followers. The trust factor attached to these brands and their aggressive marketing efforts has ensured their quick growth.

SHARE
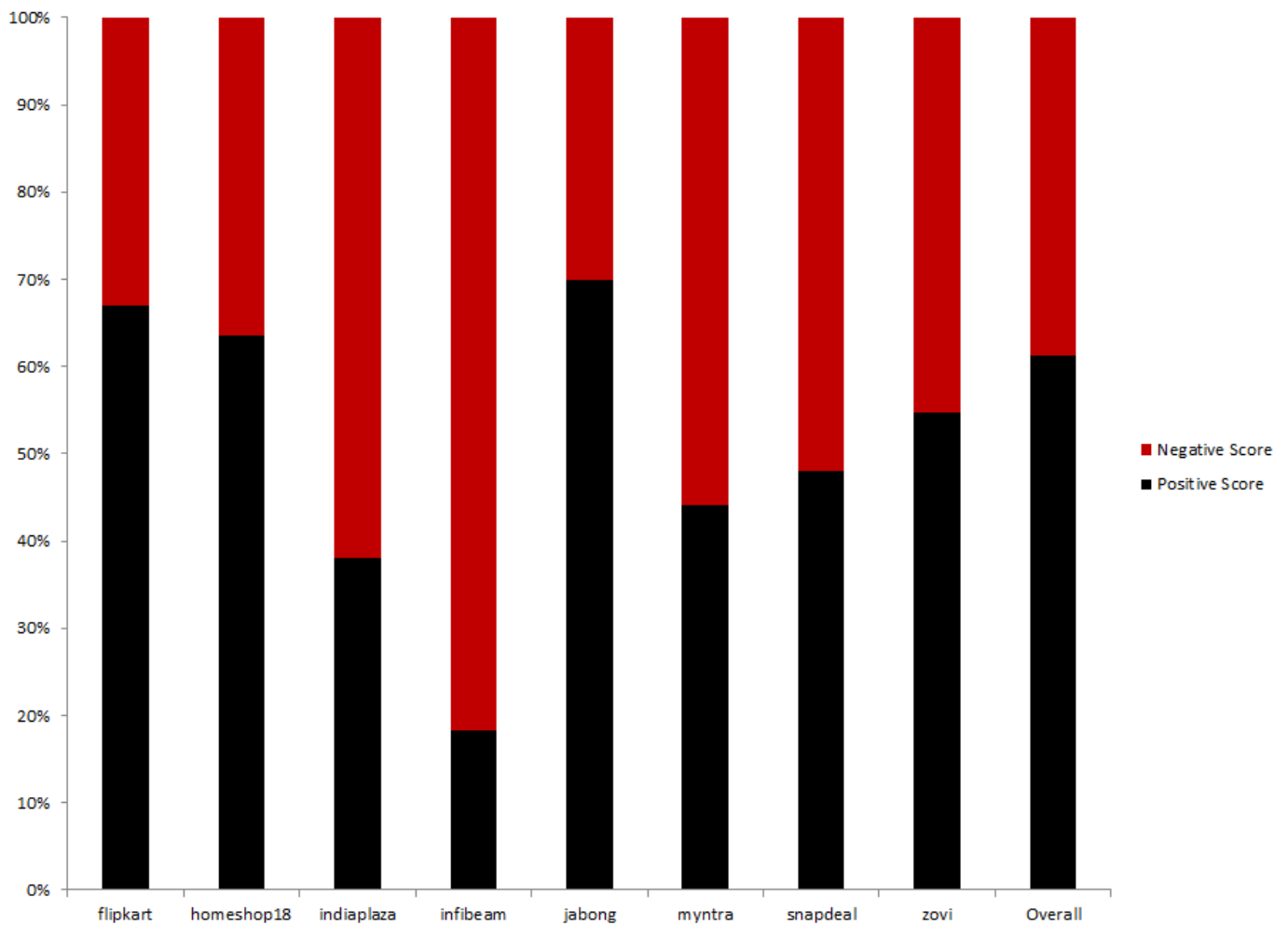
Delivery

Timely delivery of a product is a crucial aspect for any ecommerce brand. A good logistics solution at the backend not only ensures timely delivery, it also results into customer delight. The graph represents a Brand's customer sentiment when it comes to delivery of services and product.

Flipkart and Jabong are the best when it comes to delivering products with about 65% positive sentiment.

A lot of brands need to have a serious look at their logistics. People are not happy with delivery channel of most of the brands.

With almost 60% positive sentiment attached to the overall ecommerce space, there is a serious scope of improvement present at the backend. Brands must address these issues quickly and ensure that no issues crop once the customer places the order.

Customer Service
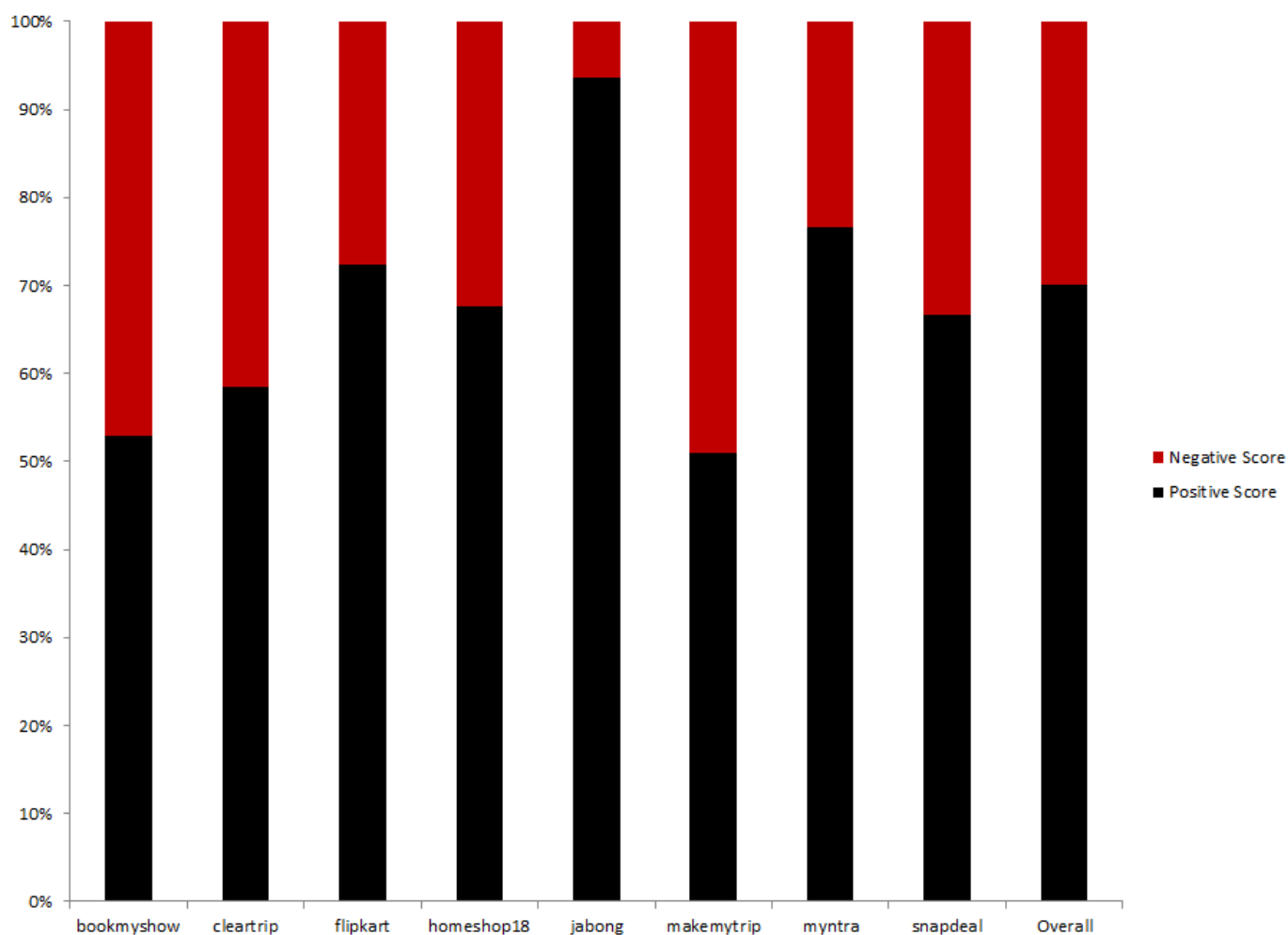
The graph represents a Brand's customer sentiment when it comes to customer service.

Another crucial aspect for an ecommerce brand would be customer service. Most of the ecommerce brands rate above average with Jabong, Myntra and Flipkart taking the top spot.

The positivity around them can be attributed to their quick response time, warm & friendly communication and robust backend operations.

The rest of the brands need to improve their customer service channel and ensure that all the queries and complaints are resolved quickly and without any hiccups.

People on social media are often very vocal, so if you provide poor service you are bound to get the brickbats.

SHARE

Overall Brand Perception
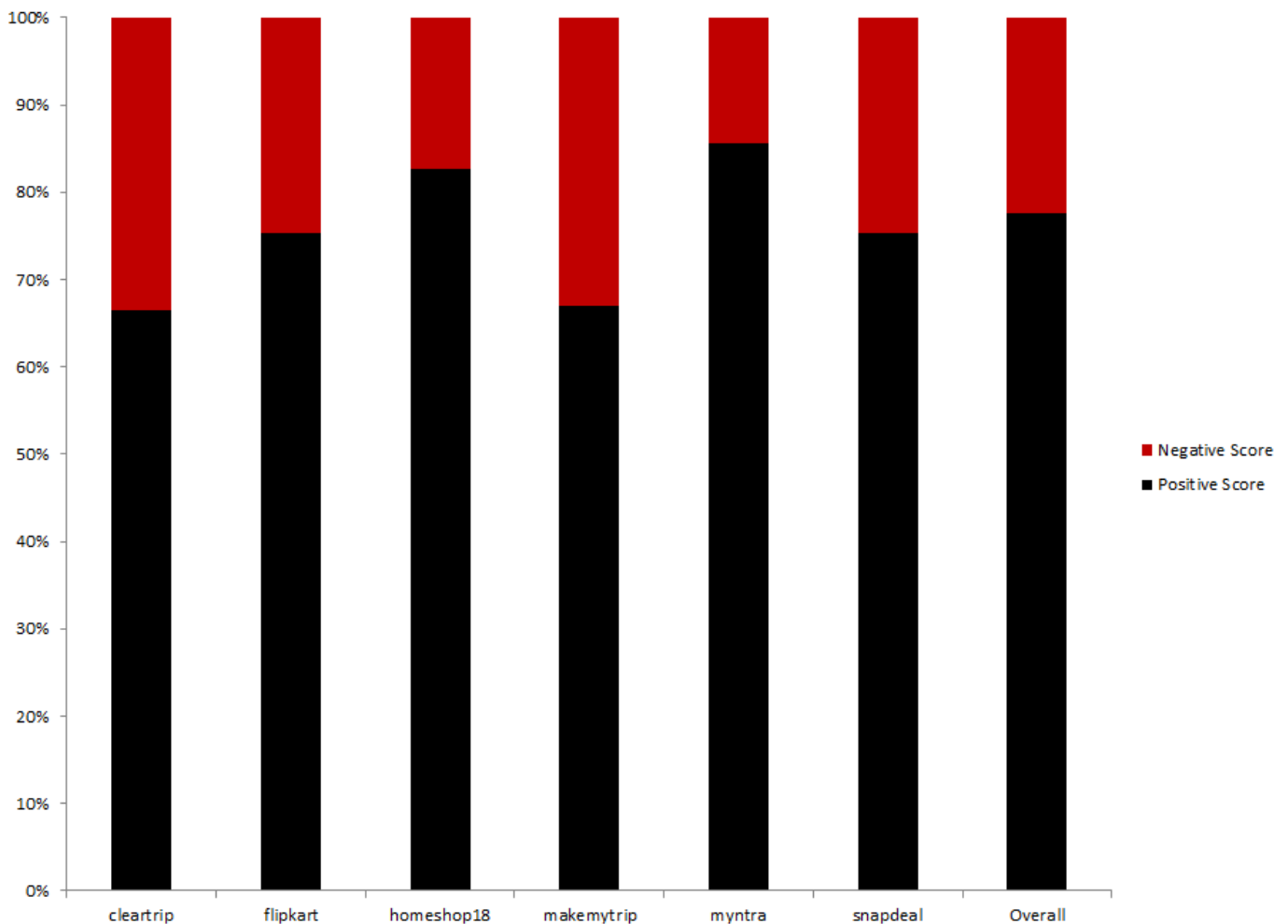
The graph represents a Brand's user sentiment when it comes to overall perception of the brand.

Delivery and customer service are some important aspects that influence the perception of a brand. But there are other aspects too that influence the perception about the brand, for example news, pricing, ongoing offers, etc.
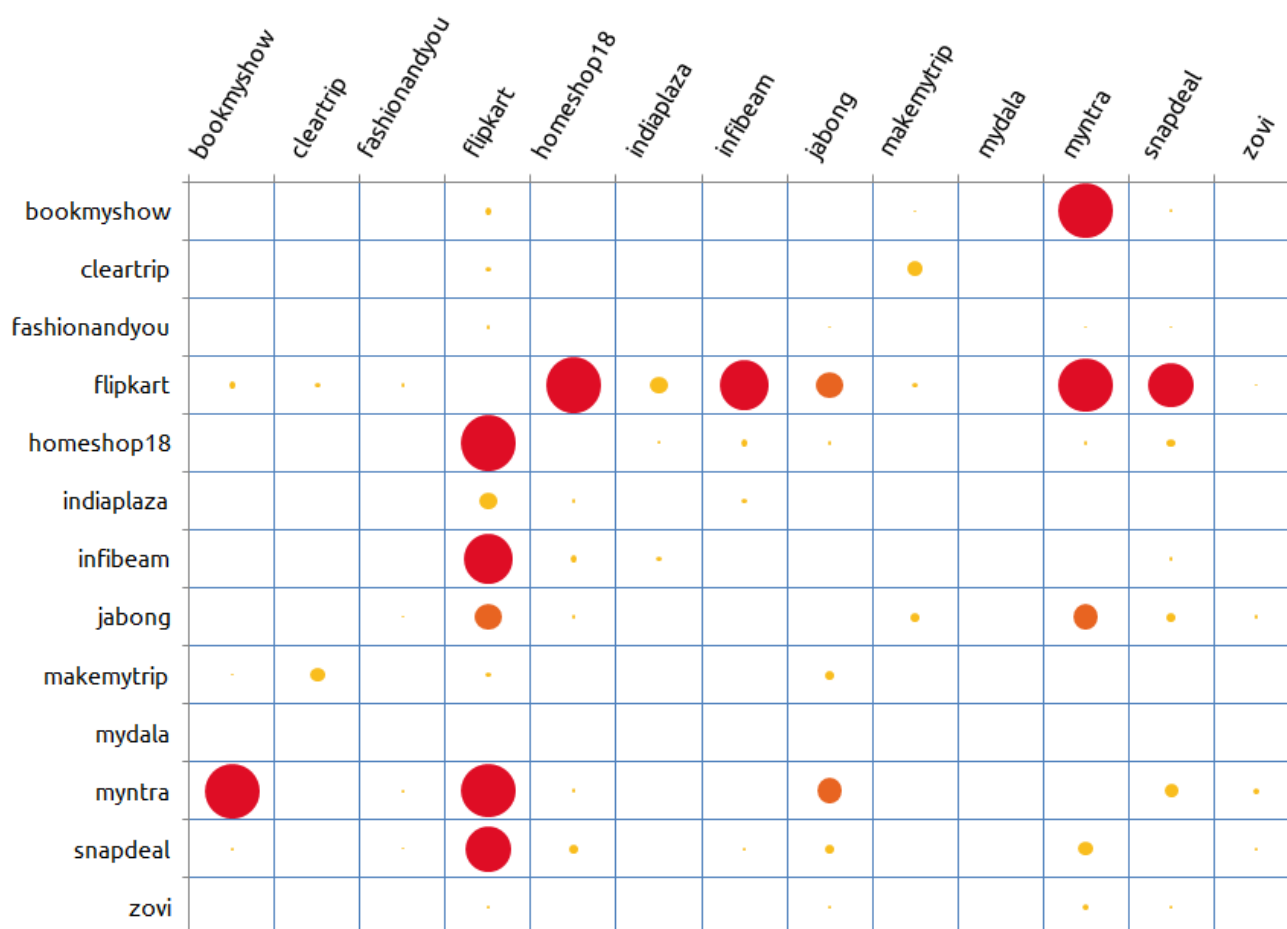
Myntra has the most positivity attached to it, closely followed by HomeShop18 and then Flipkart.

But it is really great to see brands with almost 80% positive sentiments attached them. This means that the industry is maturing and there are certain key players who are doing some phenomenal work out there.

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Brand Affinity

Column headers (top): bookmyshow, cleartrip, fashionandyou, flipkart, homeshop18, indiaplaza, infibeam, jabong, makemytrip, mydala, myntra, snapdeal, zovi

Row labels (left): bookmyshow, cleartrip, fashionandyou, flipkart, homeshop18, indiaplaza, infibeam, jabong, makemytrip, mydala, myntra, snapdeal, zovi

We monitored social mentions where two or more brands were mentioned together. These mentions gave us insights as to how a particular brand is being talked about in relation to another.

Brands like HomeShop18, Myntra, Infiebeam and Snapdeal, in most instances, are being compared to Flipkart. This clearly talks about the status of Flipkart in the Indian ecommerce scenario and the benchmarks it has set.

After Flipkart, Jabong and Myntra are talked about the most, both are targeting the same niche and are competing on equal footing.

Even though Myntra and BookMyShow are targeting very different sets of customers, they are talked about together as well. This is primarily due to, the two running campaigns targeting each other's community. This partnership has resulted in both the brands being talked about a lot on social media in the same breath.

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Most Engaging Tweets by Ecommerce Brands in 2012

2012 was definitely a turning point for social media as well as eCommerce. Not only did social media found an even wider acceptance as an effective channel for marketing and communication, many ecommerce brands came up with interesting and creative ways to push their products and services.

2012 was the year when brands got better at engaging with their community via impressive visuals and interesting campaigns.

Following is an analysis of highly engaging Twitter activities that Ecommerce brands executed in the recent months.

@Flipkart

No one has taken to social media better than Flipkart. Engaging, friendly and warm, @Flipkart is the handle that upcoming Ecommerce brands should look up to.

Let us have a look at some of the most engaging tweets from them.

Rakshabandhan Tweet

Flipkart has mastered the art of sharing the festive spirit in a creative, engaging and eye-catching way. This Rakshabnadhan tweet is a fine example of the same.

 While the imagery conjures up childhood memories of the brother-sister relationship, the copy – albeit funny- touches one's emotional core. No wonder it got such an amazing response! There is also a subtle self-promotion by the brand which I am quite sure would have proved greatly effective.

@Flipkart

Sharing Personal Updates

By sharing its personal story such as the one below where it talks nostalgically about its past, makes Flipkart come out as a personal brand.

Such stories and landmarks resonate with the community as they stop perceiving the brand as a mechanical entity and see it more as a real person. After all, businesses are conducted between people and not logos, right?

Witty Responses

Another feather in Flipkart's cap – Wit. The team handling their Twitter account not only has a good sense of humor, but also quick witted. They make sure that tweets are responded in a way that is both engaging and fun!

@BookMyShow

RIP Nirbhaya

Tapping into a serious issue and joining with the voice of public, BookMyShow came up with an apt message in a visually impactful manner.

This voicing of sentiment on a burning social issue struck a chord with its community instantly and the tweet went places.

BookMyShow
@bookmyshow

RIP Nirbhaya. We shall continue your fight.
Regards, The Community of the 'Dented' &
'Painted'. on.fb.me/VnnzB4
pic.twitter.com/XnrLQLyj

← Reply ⟲ Retweet ★ Favorite ••• More

DON'T TELL WOMEN
WHAT NOT TO WEAR
TELL MEN
NOT TO RAPE

50
RETWEETS

5
FAVORITES

3:11 PM - 29 Dec 12   Flag media

SHARE

@BookMyShow

Important Update

BookMyShow took to Twitter when making an important update about cancellation of shows on the day of a powerful leader's demise.

Since it was a precarious situation in the city, this proactive dissemination of information helped people. I'm sure people would have appreciated such an effort from the brand.

#BMSContest

BookMyShow regularly holds contests with the hashtag #BMSContest which sees a good response from the community. Running contests on topics as interesting as movies resonates with its target audience. They manage to get the community together and make the tag trend.

Copyright © 2013 BoxMyTalk.com

@Cleartrip

Firing of PR Company

Cleartrip fired the company that was handling its PR and shared the information online with a full disclosure for the knowledge of its customers.

This move made the brand come out as transparent and one that upholds the experience of its customers to the highest level. People shared the news among their network because such a move by a brand is unheard of in the Indian business circles.

Cleartrip
@Cleartrip

We fired our PR agency yesterday for spamming our customers. Here's what happened: blog.cleartrip.com/?p=4875

← Reply   ⇄ Retweet   ★ Favorite   ••• More

| **81** RETWEETS | **9** FAVORITES | | tgi |

1:44 PM - 5 Dec 12   Flag media

Upgrade to IE9

The internet is well aware of the sadness that Internet Explorer 6 was. Cleartrip's brilliant move of asking people to 'kill' their pet peeve and move on to a better browser, IE9, was a big hit.

While tapping into the internet savvy community, they incentivised it with an offer for an even better traction.

Cleartrip
@Cleartrip

Did you know people still use IE 6? Help us kill IE 6. Upgrade to IE 9 to get Rs 750 off on your next flight:
showcase.cleartrip.com/ie9/

← Reply   ⇄ Retweet   ★ Favorite   ••• More

| **40** RETWEETS | **3** FAVORITES |

S H A R E

@MakeMyTrip

Unjumble Campaign

One of the best Twitter campaigns of last year, MakeMyTrip asked their community to unjumble the city names. But the masterstroke was the way they integrated their #FlightsFlashSale within the campaign.

It would have been better if the campaign was spread over a course of few days but nonetheless, it was a highly engaging campaign.

MakeMyTrip.com
@makemytrip

Ques 1. NKFUFRART is nicknamed as "Mainhattan"! The slashed price to this city starts @35,999/- with MakeMyTrip. Unjumble! #flightsflashsale

← Reply ⇄ Retweet ★ Favorite ••• More

38 RETWEETS   **3** FAVORITES

4:09 PM - 14 Dec 12

MakeMyTrip.com
@makemytrip

Q2 HHSRJAA was first emirate to provide education for women in 1942. The slashed price with MakeMyTrip starts @ 15,999. #FlightsFlashSale

← Reply ⇄ Retweet ★ Favorite ••• More

35 RETWEETS   **3** FAVORITES

4:21 PM - 14 Dec 12

MakeMyTrip.com
@makemytrip

Q3 The Symbol of INANSGHHA was featured in Fantastic Four:Rise of the Silver Surfer! #FLIGHTSFLASHSALE price starts @ 24,999 with MakeMyTrip

← Reply ⇄ Retweet ★ Favorite ••• More

39 RETWEETS   **2** FAVORITES

4:28 PM - 14 Dec 12

MakeMyTrip.com
@makemytrip

Q4 World's first night zoo is located in AOSIRPENG! MakeMyTrip #FLIGHTSFLASHSALE price to this city starts @ 17,999. Unjumble!

← Reply ⇄ Retweet ★ Favorite ••• More

33 RETWEETS   **1** FAVORITE

4:48 PM - 14 Dec 12

SHARE

@MakeMyTrip

MakeMyTrip.com
@makemytrip

Q5 KSOAA is also known as the 'Water City'. MakeMyTrip #FlightsFlashSale starting price to this city is @ 34,999. Unjumble!

← Reply ⇄ Retweet ★ Favorite ••• More

34 RETWEETS **2** FAVORITES

4:57 PM - 14 Dec 12

MakeMyTrip.com
@makemytrip

Q5 OACGCHI is home to over 30 Fortune 500 companies! MakeMyTrip #FlightsFlashSale starting price for this city is @ 51,999. Unjumble!

← Reply ⇄ Retweet ★ Favorite ••• More

32 RETWEETS **2** FAVORITES

5:05 PM - 14 Dec 12

MakeMyTrip.com
@makemytrip

Q7 270 languages are spoken in LDNOON! MakeMyTrip #FlightsFlashSale price to this city is @ 40,999. Unjumble!!

← Reply ⇄ Retweet ★ Favorite ••• More

32 RETWEETS **3** FAVORITES

5:15 PM - 14 Dec 12

As you can see, Indian ecommerce brands are coming with some fantastic social media activities, which must be lauded. I hope to see more such cool campaigns/activities in the coming days from other brands as well.

SHARE

About BoxMyTalk.com

BoxMyTalk is a social monitoring and analysis tool for brands to filter, analyze and tag all social mentions into useful business functions.

Salient features of BoxMyTalk:

Social Analytics

The tool provides deep analysis of social media content consumption patterns, trends around your brand, competition activities and sentiments towards the brands that help the brand managers take calculative decisions on the brand's social media strategy.

Social Monitoring

You can monitor your official brand properties, competitor's social media properties and also other user generated content that lies on blogs, forums, and review sites. You can also keep track of your campaigns and analyze the effectiveness of the same.

Big Data Analysis

The platform has a built-in big data analysis capability to filter, analyze and tag millions of social mentions in real time to derive actionable insights.z

Workflow Management

The tool allows assigning queries to different members of the team, each member can have access to the history of conversations and can take action on it from the dashboard. The tool will also mark conversations based on priority levels.

Tagging

The tool has the ability to track keywords that allow the conversations to be tagged in various customizable categories like customer support, lead etc. Each category can be assigned to a specific person or a department thereby increasing accountability and productivity.

Social Help Desk

This tool can help you to effectively and seamlessly manage all your customer support queries by users on Social Media, Blogs and review sites. It will allow helps you in meritoriously transforming them into becoming brand evangelists of the brand.

Connect with us

Contact

Email: info@boxmytalk.com
Phone: +91-80-412-555-07
Address: #3483, 2nd Floor, 14th Main
           HAL 2nd Stage, Indiranagar
           Bangalore: 560008