



Nine Merchants Punch a "Fast Pass" in Order to Meet the e-tailing group's Criteria for Excellence in Online Customer Service

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THE FACTS

Results of the e-tailing group's 14th Annual Mystery Shopping Study, conducted during 4Q'11, recognize nine merchants out of the 100 benchmarked for excelling at online customer service. "These merchants understand that customers gravitate to sites with front-end efficiency and back-end speed in support and logistics. Delivering a swift online shopping experience has become the ticket to retention. We commend them for their solid execution," announced Lauren Freedman, President of the e-tailing group.

Top Performers(alpha order)

Ballard Designs	Green Mountain Coffee	Williams-Sonoma
Frontgate	The Home Depot	Wine.com
Garnet Hill	Tiffany & Co.	Zappos

METHODOLOGY

To qualify as "top performing" each of the 100 merchants was ranked using benchmarking extrapolated directly from results of the survey. As customer expectations for exemplary service continue to rise, this year we took a tougher stance assessing what criteria top merchants for online customer service must entail. Winners were revealed via a process whereby sites were systematically eliminated for not possessing "must have" features in the following order of importance:

1. Accessibility of 800# on site was 2.5 or higher (on a scale of 3.0 and including home page visibility)
2. Answer e-mail question within 24 hours, correctly with a specific answer and personalized in salutation
3. Overall experience on customer service call (efficiency/knowledge) was a 2.0 or higher (on a scale of 3.0)
4. Email order confirmation sent with order # and customer service information included
5. Three or fewer days to receive package
6. Presence of one-click/quick checkout feature
7. Five or fewer clicks to checkout

Four metrics from the survey are charted here to demonstrate the commendable performance by these top sites for customer service versus the average of the 100 sites shopped.

Merchant	Overall customer experience (1-3, 3=best)	# of hours/ minutes to respond to email	# of clicks from selection of product through checkout	Business days to receive item
Ballard Designs	3.00	23 hours/10 minutes	4	3
Frontgate	2.00	4 hours	3	3
Garnet Hill	2.50	28 minutes	3	3
Green Mountain Coffee	2.50	5 hours/ 9 minutes	5	2
The Home Depot	2.25	1 hour/1 minute	5	3
Tiffany & Co.	3.00	18 hours/44 minutes	5	3
Williams-Sonoma	3.00	52 minutes	4	2
Wine.com	3.00	1 hour/54 minutes	5	2
Zappos	3.00	22 hours/40 minutes	3	2
Average of EG100 sites shopped with these features	2.33	31 hours/27minutes	4.83	3.43

NOTABLE FINDINGS

Conveniences and efficiencies throughout the shopping experience contributed significantly to providing customers with the "fast pass" they desire. For example, the average number of clicks to checkout was 4.83 versus 5.13 in 2010. Overall fulfillment times improved to 3.43 days versus 4.26 days last year (difference in business days from order date to receipt date except for companies that ship via USPS where Saturdays were also counted).

Believing that fast fulfillment impacts merchant selection we have charted performance by category, highlighting the 27% of merchants who delivered in two days or less (just 15% achieved this level in 2011). Notably those selling office supplies, technology and pet products showed the best while none of the department stores and mass merchants benchmarked made the grade.

Category	# of merchants in study	# of merchants who fulfilled in 2 days or less	% of merchants in category fulfilling in 2 days or less	Merchants who met this criteria
Accessories/Shoes	9	2	22%	DSW, Zappos
Apparel	15	1	7%	J. Crew
Baby/Toys/Games	5	2	40%	American Girl, Toys R Us
Books/Music/Media	4	1	25%	Shop PBS
Department Stores	6	0	0%	None
Drugstore/Health & Beauty	7	3	43%	Bath & Body Works, Benefit, Clinique
Food/Gifting	9	4	44%	Brookstone, Godiva, Green Mountain Coffee, wine.com
Home/Garden	12	3	25%	Crate & Barrel, Jonathan Adler, Williams-Sonoma
Mass Merchants	8	0	0%	None
Office Supplies	2	2	100%	Office Depot, Staples
Pets	2	1	50%	Petco
Sporting Goods	14	4	29%	Cabela's, Dick's Sporting Goods, Foot Locker, Road Runner Sports
Technology	7	4	57%	Abt, Apple, Crutchfield, hpshopping
EG 100	100	27	27%	

Faster shopping can also be attributed to greater presence of features like one-click settings, fast buy/direct to cart buying, pre-population of customer information, reordering from order history, single checkout across multiple merchants, not requiring membership and the use of PayPal. We anticipate the number of merchants offering these conveniences to accelerate in the near future, further streamlining the online buying process.

Feature	EG 100 2011	EG 100 2010
Pre-Population of Customer Information	98%	96%
Fast Buy/Direct to Cart Buying	71%	68%
One-Click Settings	51%	29%
PayPal	46%	40%
Single Checkout Across Multiple Merchants	33%	28%
Reordering from Order History	15%	5%
Requires Membership	11%	20%

Communication options contributed to shopping ease with improved call center experiences and more ways to be in touch via chat – both live and proactive. Positively, online return processing was available on 25% of the EG100 sites versus 17% last year plus year-over-year 51% of these merchants provided pre-paid return labels, up from 38%.

Feature	EG 100 2011	EG 100 2010
Overall Call Center Experience (1-3, 3=best)	2.33	2.24
Click to Chat Available	47%	43%
Proactive Chat	21%	12%
Online Return Process	25%	17%
Pre-Paid Return Labels	51%	38%

However, some "roadblocks" to efficient shopping were encountered.

- Longer times to receive email responses: 31 hours/27minutes vs. 25 hours/25 minutes
- More complicated return options: Among the 95 merchants with policies posted, more than one-half (51%) presented multiple criteria for returns versus just 26% last year

Lastly, charted here are the essentials – universal features and functionality that have become baseline for any ecommerce endeavor with penetration among the EG100 now at 94% or higher.

Feature	EG 100 2011	EG 100 2010
800#/Toll-Free Customer Service	100%	98%
Contact Information	99%	97%
Immediate Order Confirmation# in the Shopping Cart	99%	98%
Post-Order Email Confirmation	97%	97%
Real-Time Inventory on the Product Page	97%	96%
Return Policy Stated	95%	95%
Email Shipping Confirmation	94%	92%

IN SUMMARY

"To get traction with consumers, merchants must provide a customer service 'fast pass,' reiterated Lauren Freedman, President of the e-tailing group. "The shopping experience has to be express and efficient to attract and retain shoppers in today's competitive marketplace."

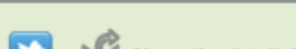
Findings from the complete 14th Annual Mystery Shopping Study will be summarized in a report which will be available to purchase and download in early February.

THE COMPANY

The e-tailing group, inc. serves as the multi-channel merchant's eye, bringing a merchant's sensibility to evolving the multi-channel shopping experience. A Chicago-based consultancy, they provide practical strategic perspectives and actionable merchandising solutions to merchants selling online as well as to enabling technology firms.

For more background about this research study, including a list of merchants surveyed or for additional information on the e-tailing group, inc. please contact Lauren Freedman at LF@e-tailing.com or visit the e-tailing group website www.e-tailing.com.

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