the e-tailing group
press release

2013: Merchants Seek Mobile Mastery

A Task-Oriented Review of the Mobile Experience

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STATE OF MOBILE

"The customer is most certainly driving mobile adoption and savvy retailers have risen to the occasion delivering well-conceived mobile sites. Streamlining the shopping experience via a 'less is more' mindset to include only the essential browse and buy components ensures that shoppers can quickly find products of interest and expediently checkout. Taking a task-oriented approach to refining mobile sites will ensure that shopper satisfaction is high where conversion rates continue to escalate. Integrating cross-channel elements makes certain that the customer connects to all of your channels at their convenience where the mobile experience supports the demanding shopper. Vigilant monitoring and timely evolution of mobile sites is mandatory in the ever-changing world of mobile shopping," concludes Lauren Freedman, President, the e-tailing group, inc. An accompanying report, *Merchants Seek Mobile Mastery* highlights all study metrics and illustrates best practices along with roadmap recommendations for 2014 and is available at www.e-tailing.com

METHODOLOGY

In 3Q13 we benchmarked the on-the-go consumer experience by exploring mobile sites from the home page product page perspective and then going through the checkout process up to the point of order submission. The onsite user experience was evaluated on **188 metrics**, looking at **6 top tasks** consumers are likely to perform along with the overall usability of their experience.

For the past 4 years, the e-tailing group has strived to be in the forefront of mobile by adapting our industry respected mystery shopping study to the mobile channel. Objectives for the 2013 survey were to assess the year-over-year trends, highlight top mobile retailers and key in on best practices. Retailers can then roadmap opportunities to evolve this technology in hopes of maintaining parity with their competitors all the while staying in step with the connected consumer.

TOP PERFORMERS

In 2013 we have once again scored retailers via the Mobile Customer Experience Index, which leverages quantitative analysis to uniquely understand how mobile merchants stack-up against the 50 mobile websites in the e-tailing group study (EGM50), direct competitors, and their categories. Mobile websites are scored on a 100-point scale based on an assessment of metrics on five key pages, presence and execution of vital merchandising tactics, and accessible customer service. In addition we evaluate:

- The best overall usability and any errors experienced in the process
- Effective promotional execution
- Feature-rich retail locators, lookup and pickup options
- Shopper-centric search options
- Strong cross-channel shopper profile integration

• Efficient checkout, related tools and likelihood to buy
• Cross-device and cross-channel promotion

Six Merchants Score 80+

Achieving an 80+ score sets the following six merchants apart from their competitors where Toys 'R Us and Foot Locker are new to the club and the other four retain their status from 2012.

the e-tailing group 4th Annual Mobile Customer Experience Index Top-6 Performing Websites (Scoring rounded out of a possible 100)	
EG M50 MOBILE MERCHANTS	69.73
Toys 'R Us	83.50
American Eagle Outfitters	82.50
Crate & Barrel	82.25
Nordstrom	80.25
Sephora	80.25
Foot Locker	80.25

MOBILE TASK PERFORMANCE HEADLINES

After substantial discussion and continuous review of our internal mobile process we chose to take a tactics-based approach to stay in step with shoppers. A quick overview of the 6 tasks selected and a performance headline summary of each scenario sets the stage for our more extensive review.

Mobile Tasks	Performance Headline
1. Connect to a Store (find a store, check in-store product availability, reserve a product for store pickup, read weekly circular)	Retailers have heavily invested in the connection to the store and it is reflected in the mobile experience
2. Visit Retailer's Mobile Site including key pages (Home, Category, Product Page, Search Results, Shopping Cart)	A standout selling experience is a work-in-progress for most retailers despite higher than expected tactical advancement from a brand, merchandising and usability point-of-view
3. Search for A Product	Well executed leveraging existing technology where retailers streamline search and sorts for mobile usage
4. Research a Product	Majority of desired consumer functionality has been ported to the product page eliminating frivolous features in order to drive shoppers through the path to purchase quicker
5. Buy a Product	Checkout still sees major obstacles where cross-channel efficiencies are not always in place and the demands of shoppers can cause abandonment
6. Seek Customer Service	Customer service destinations find improved experiences with adequate information and greater access

KEY INDICATORS

Consistency Rankings

A quick review of our usability findings starts with consistency to understand how the mcommerce experience compares to ecommerce. We ranked four distinct areas where the greatest degree of consistency was seen from a category perspective. This was followed on by promotional parity, branding and merchandising.

Consistency Element	EG M50 3Q13	EG M50 2Q12
	% Penetration	% Penetration
Top Level Category Range (1-3 3=Same As E-Commerce Site)	2.83	2.67
Promotions (Free Shipping, Buy More Save More etc.) 1-3 Where 3 Is Consistent	2.48	N/A
Brand (1-3 3=Consistently Branded)	2.38	2.81
Feature Set (Exclusives/ What's New Etc.) 1-3 Where 3 Is Consistent	2.36	N/A

Key Page Findings

Branding and merchandising need to coexist with a streamlined experience and no one has figured out that formula just yet. Key pages comprise the majority of site visits where scores are srong due to tactical adoption though usability could still be elevated.

PAGE	POTENTIAL POINTS	AVERAGE SCORE
Home page	5.00	4.46
Category page	2.00	1.63
Search results	3.00	2.46
Product page	5.00	4.06
Shopping cart	5.00	3.56

THE CHECKLIST

-Maintain branding consistency across all channels and ensure that customers can connect with your brand via 800#, email contact form or email address
-Employ a combination of merchandising and promotional tactics on the home page and throughout the site as enticements to drive visitors deeper rather than hiding them on interior pages that might never be viewed by the shopper
-Keep usability top-of-mind; use only legible text, implement keyword search at the top of all site pages, provide users with relevant refinement and sort options, and enable shoppers to check out quickly/efficiently with pre-populated profile information within an interface that requires minimal "clicks" to complete
-Provide a retail locator that includes comprehensive information - geolocation, driving directions/maps, store hours, and clickable phone numbers which will ensure your customers arrive at the destination ready to purchase
-Embrace inventory lookup and the ability to pick up products to efficiently connect customers to your stores
-Enhance product pages with comprehensive product information, relevant recommendations, product photos that can be enlarged/viewed from other angles or color changed, along with meaningful ratings and reviews
-Explore the right level of supporting category content to embellish the experience tapping into video for optimal engagement
-The checkout process should be convenient and streamlined with a minimal number of steps including choice of payment with confidence builders along the journey
-Monitor your mcommerce experience to maintain parity but more importantly to stay ahead of your category and the industry's best
-Customer service should be readily available and customers should have all the information necessary to make a purchase (shipping, return policy, etc.)

THE EG M50

Amazon	Dell	Home Depot	Petco	Tiffany & Co.
American Eagle Outfitters	Dicks Sporting Goods	HSN	Pottery Barn	Tiger Direct
American Girl	DSW	J Crew	REI	Tory Burch
Bath & Body Works	eBags	JCPenney	Saks Fifth Avenue	Toys 'R Us
Best Buy	Estee Lauder	L.L. Bean	Sears	Urban Outfitters
Chico's	FTD	Lowes	Sephora	Victoria's Secret
Coach	Foot Locker	Macy's	Staples	Walgreen's
Crate & Barrel	Gap	Nordstrom	Steve Madden	Walmart
Crutchfield	Golfsmith	Office Depot	Target	Williams-Sonoma

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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