

Post-purchase Performance France Country Report

Highlights



TRACKING



DELIVERY



PACKAGING



RETURNS & REFUNDS

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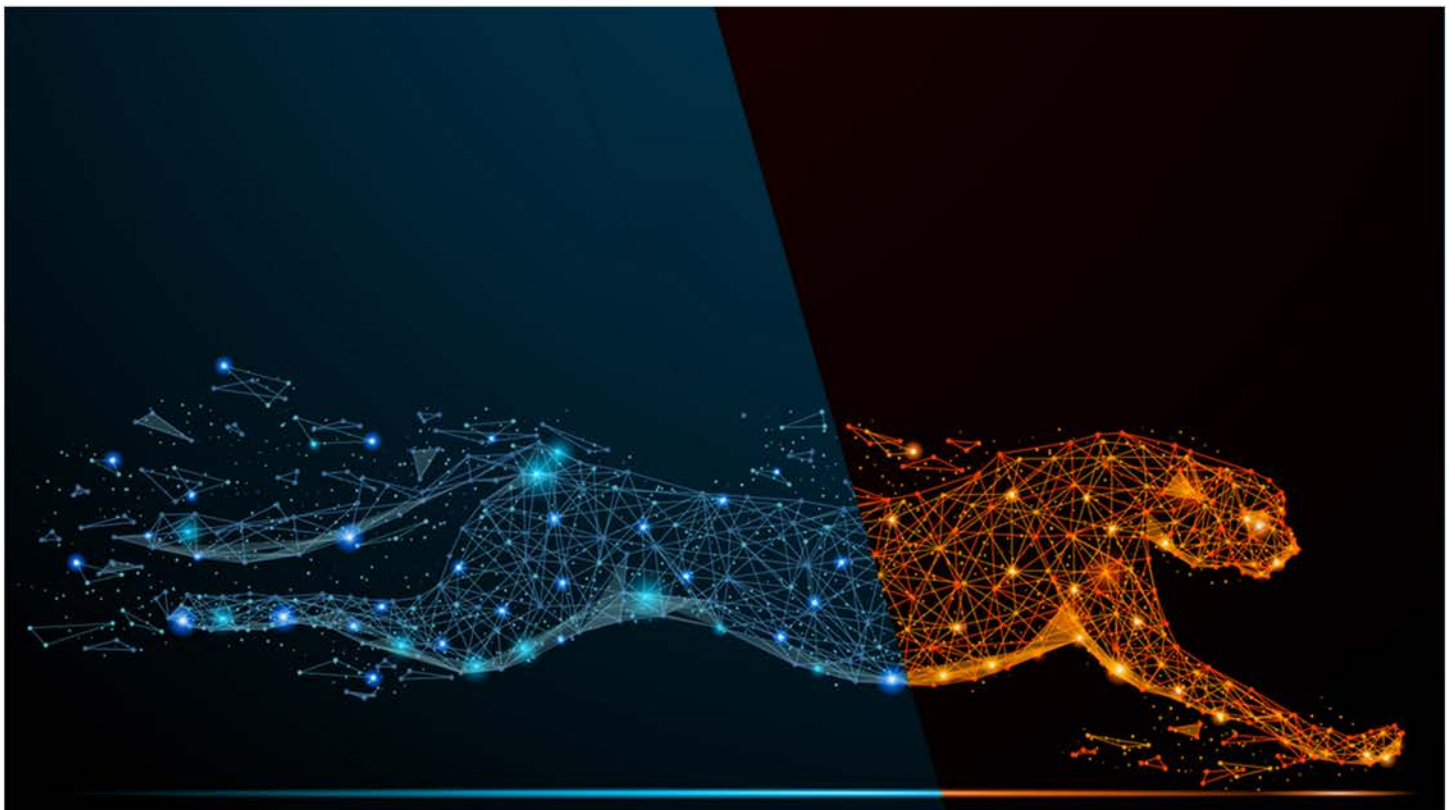
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TURNING POST - PURCHASE INTO COMPETITIVE ADVANTAGE



SO DIGITAL

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Execution, not strategy, separates leaders from laggards. Leverage our platform solutions and talent resources to create organisational simplicity and deliver speed and efficiency in functional execution across markets.

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An Amsterdam based digital solutions provider which specialises in working with headquarters of global brand organisations. Tailor made for teams who oversee functional strategy execution in multi-market environment.

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We help global brand organisations align on the inside so they can win on the outside. We optimise global brand's functional strategy execution through digital. Solution & service verticals include global branding, e-commerce and in-house brand creative operations excellence as well as premium digital brand content production and data analytics resources.

WHY WE DO IT

We believe the promise of digital is simplicity not complexity. We believe that digitally enabled professionals are the ones who turn an opportunity of digital into a success of digital. We believe we can help them unlock the promise of digital by providing scalable platform solutions & services for functional execution excellence.



Since 2020 / Global

Flagship clients



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Since 2014 / 14 WE countries

GLOBAL OPERATIONS EXCELLENCE

BRANDING | CREATIVE | E-COMMERCE

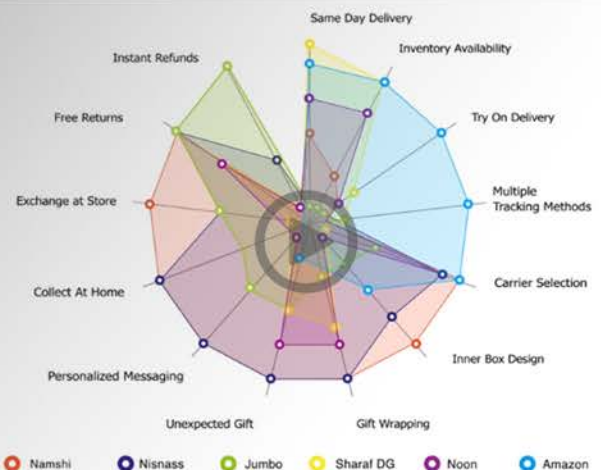
TURNING POST - PURCHASE INTO COMPETITIVE ADVANTAGE

- IDENTIFY AVERAGE CONSUMERS EXPECTATIONS
- IMPROVE COMPETITIVENESS
- IDENTIFY AND CLOSE PERFORMANCE GAPS
- UNCOVER DIFFERENTIATING OPPORTUNITIES
- BOOST CONSUMER LOYALTY
- FOCUS YOUR INVESTMENTS

BY PROVIDING COMPETITIVE BENCHMARKING INSIGHTS

E-Commerce Operations Excellence Platform

Management tool that helps companies formulate, evaluate, and improve their e-commerce strategies by providing a systematic assessment of competitive performance of post-purchase experience across markets.



Ask for a demo

Live Walkthrough

What is benchmarking? Why is it used and what for?

Continuous improvement is a long-term business strategy to improve your business in terms of customer value and satisfaction, quality, speed to market, flexibility and reduced cost.ⁱ Benchmarking is the key enabler of continuous improvement. As a continuous improvement tool, benchmarking is used to improve core competencies, the basic business processes that allow a company to differentiate itself from its competitors.ⁱⁱ The continuous pursuit of excellence is the underlying and ever-present goal of benchmarking practices.

Benchmarking is an external focus on internal activities, functions, or operations in order to achieve continuous improvement. It is the process of judging a company's processes or products by comparing them to the world's best, including those in other industries. Benchmarking is emerging in leading edge companies as a tool for obtaining the information needed to support continuous improvement and gain competitive advantage.ⁱⁱⁱ

“
*Benchmarking is the key enabler
of continuous improvement.*
”

In benchmarking, the enterprises compare their practices against the best organizations in their industry or compare different functions of the enterprise against each other and attempt to close the performance gaps. Depending on the purpose of the benchmarking, there are multiple ways to categorize them. Process benchmarking, performance benchmarking, and strategic benchmarking are most common general categories which look at process, performance and strategy comparisons between your organization and external target set.

Competitive benchmarking is the process of comparing your company against a number of competitors using a set collection of metrics which may include both process and performance elements.

Strategic benchmarking looks at what strategies organizations are using to make them successful.^{iv} More importantly it can identify business processes and output levels of those business processes which drive organization's market leadership position.

i R.Keller, "Continuous Improvement -- Taking the Long-Term Perspective Will Pay Off; industryweek.com; <https://www.industryweek.com/the-economy/article/21938524/continuous-improvement-taking-the-longterm-perspective-will-pay-off>. Accessed on 18.7.2020 at 17.15

ii T.Wireman, "Benchmarking The Key to Continuous Improvement"; maintworld.com; <https://www.maintworld.com/Applications/Benchmarking-The-Key-to-Continuous-Improvement>. Accessed on 18.7.2020 at 17.45

iii Elmuti, D. and Kathawala, Y. (1997), "An overview of benchmarking process: a tool for continuous improvement and competitive advantage", *Benchmarking for Quality Management & Technology*, Vol. 4 No. 4, pp. 229-243. <https://doi.org/10.1108/14635779710195087>

iv G.T.Yamamoto, Ö.K.Şekeroglu, M. Kaykusuz, "Brand Management Benchmarking(BMB)for Global Arena" ; academia.edu

What is a post-purchase experience. Why is it important in eCommerce?

One of the vital parts of customer experience is the post-purchase experience, i.e. the experience which starts after the purchase is done and ends with consumption or return of the product.^v The advent of e-retailing has created multiple options for customers. Hence, most important concern is to identify the experience which entices customers for repurchase from the one particular e-retailer. **Repurchase intent** or consumer loyalty is particularly relevant for eCommerce as a channel as it influences its profitability and long-term sustainability. As digital saturation is driving up customer acquisition costs (CAC), repeat customers and customer loyalty will increasingly be important. With the influx of D2C brands (and their inevitable competitors) playing fast and loose in the digital ad space, more dollars are needed to compete for the same impressions.

“*Repurchase intent or consumer loyalty is particularly relevant for ecommerce as a channel as it influences its profitability and long-term sustainability.*”

As a result, CAC has reached a point where it's outpacing customer lifetime value (LTV).^{vi} Acquiring a new customer is anywhere from five to 25 times more expensive than retaining an existing one. In fact, studies, such as that one from Frederick Reichheld of Bain & Company (the inventor of the net promoter score) that shows increasing customer retention rates by 5% increases profits by 25% to 95%.^{vii}



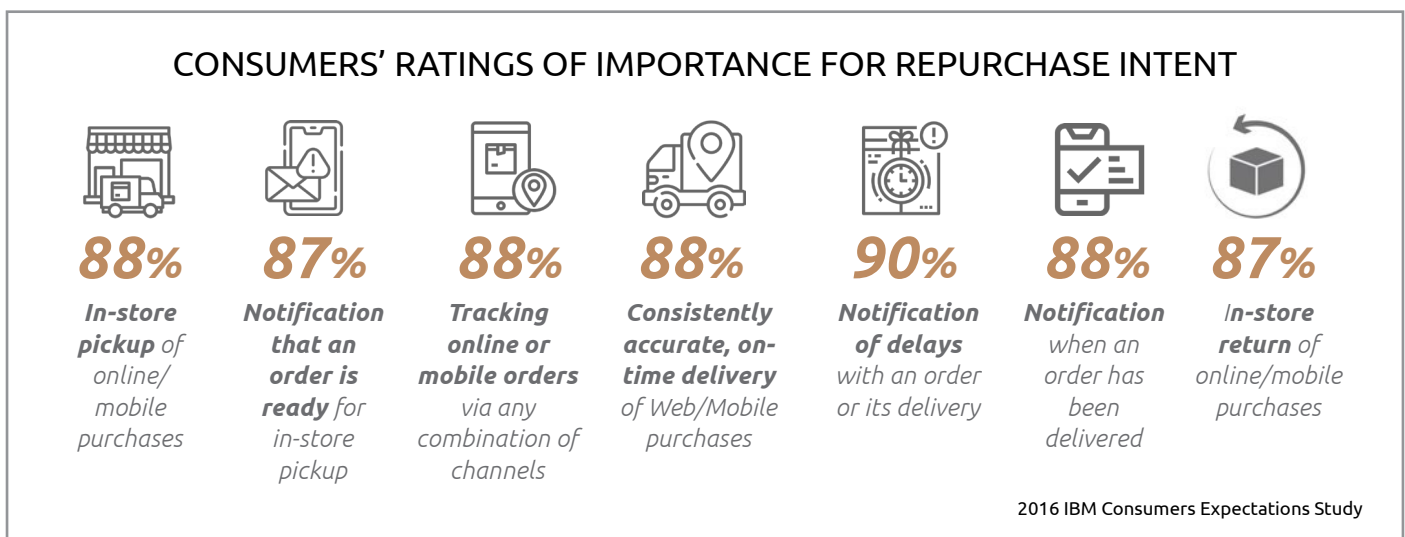
v Kumar, Amresh & Anjaly, Bhawna. (2017). How to measure post-purchase customer experience in online retailing? A scale development study. International Journal of Retail & Distribution Management. 45. 10.1108/IJRDM-01-2017-0002.

vi T.Peterson, "D2C brands are driving up customer acquisition costs – and it's time to course-correct"; marketingland.co; <https://marketingland.com/d2c-brands-are-driving-up-customer-acquisition-costs-and-its-time-to-course-correct-264293>. Accessed on 19.7.2020 at 13.14

vii F.Reichheld, "Prescription for cutting costs", Bain & Company; Accessed on 18.7.2020 at 15:01 https://media.bain.com/Images/BB_Prescription_cutting_costs.pdf

Dominant influence of post-purchase experience for consumer loyalty formation in eCommerce has been confirmed by multiple academic studies and consumer surveys. **Post-purchase factors** are the factors that are experienced by customers after they complete transactions. Several post-purchase factors, such as convenience of tracking order, on-time delivery and ease of customer service, play vital roles in influencing customer loyalty.^{viii} The respondents of the 2011 US consumer survey made by Institute for Business Value (IBV) made it clear that of the 3 phases of the brand experience (i.e., pre-purchase, purchase, and post-purchase), the post-purchase phase was most influential over their retail brand relationships and their willingness to promote a given retailer to other consumers.^{ix}

Studies have found that high performing post-purchase factors in eCommerce reduce consumers' perceived risk and increase perceived control. When respondents of 2016 IBM Consumers Expectations Study were asked to gauge the importance of various retailer capabilities, several post-purchase capabilities received extremely high scores for influencing where consumers choose to shop:



“

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”

S. Otim and V. Grover studied in 2006 online customer ratings from bizrate using ordinary least squares analysis to identify the effects of pre-purchase, transaction related and post-purchase services on customer loyalty. They found that post-purchase service factors (order-tracking support, on-time delivery and customer support) influenced customer loyalty significantly. ^x To be able to effectively manage it, post-purchase experience needs to be able to be measured. How to measure post-purchase customer experience in online retailing was at the center of a 2017 scale development study done by A. Kumar and A. Bhawna. The study yields that the scale for measuring OPPCE (online post-purchase experience) is multi-dimensional. It has six dimensions, i.e. delivery, product-in-hand, return and exchange, customer support, benefits and feel-good factors. The proper focus on the items of these dimensions can help e-retailers improve customer experience and increase repeat purchase.^{xi}

viii Ramanathan, R. (2011). An Empirical Analysis on the Influence of Risk on Relationships between Handling of Product Returns and Customer Loyalty in ECommerce. *International Journal of Production Economic*, 130,255-261.

ix J. Stelzer "You Had Me At "Goodbye": Post-Purchase Phase Is Key"; IBM.com : <https://www.ibm.com/blogs/watson-customer-engagement/2017/02/08/goodbye-post-purchase-phase-key/> Accessed on 17.08.2018 at 08:19

x Otim, S., Grover, V., 2006. An empirical study on Web-based services and customer loyalty. *European Journal of Information Systems* 15, 527–541.

xi Kumar, Amresh & Anjali, Bhawna. (2017). How to measure post-purchase customer experience in online retailing? A scale development study. *International Journal of Retail & Distribution Management*. 45. 10.1108/IJRDM-01-2017-0002

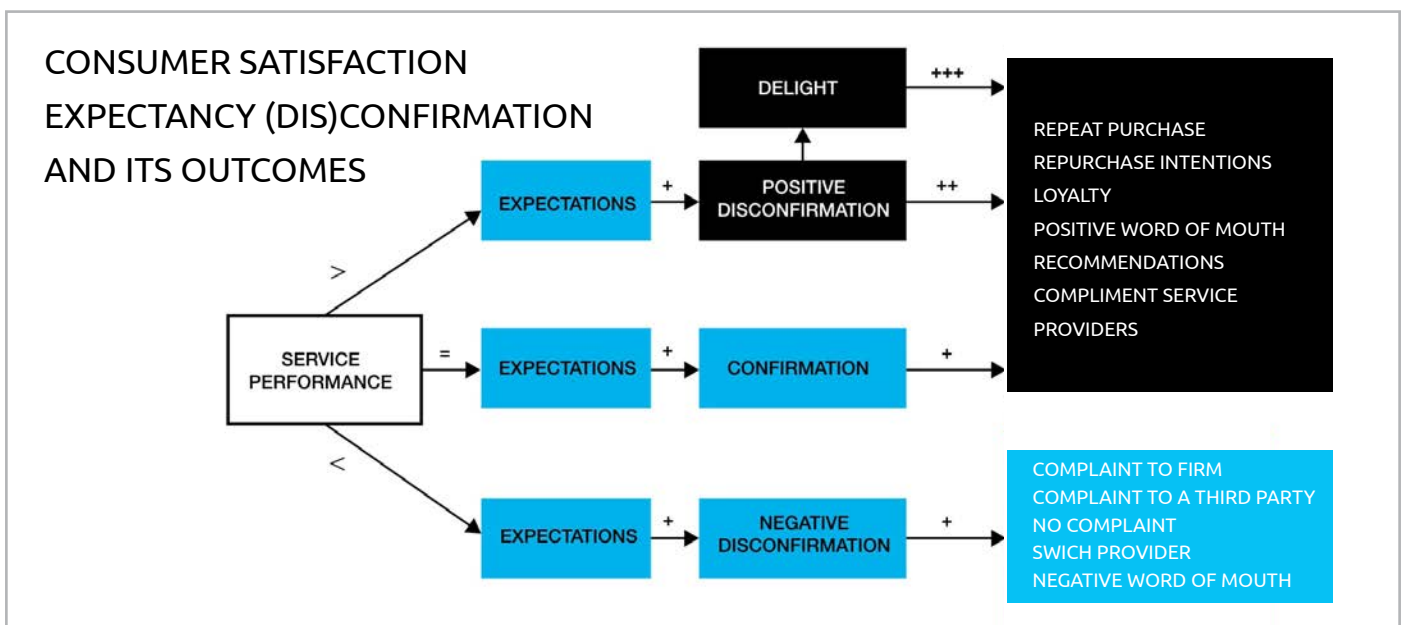
What are consumer expectations? How do they influence consumer satisfaction in eCommerce?

Customer loyalty which is mostly established at the post-purchase phase of e-commerce consumer journey requires strategic design, management, and continuous optimization of e-commerce operations in relation to the market developments and market defined customer expectations.^{xii} Loyalty is impossible to create without satisfied customers. Customer satisfaction is a measure of how products and services supplied by a company meet or surpass customer expectations.^{xiii} So generating customer loyalty by delivering post-purchase performance which will satisfy your customers is impossible to do without knowing what are their expectations in relationship to this phase of the e-commerce journey. To meet & exceed customers expectations, which will create consumer satisfaction and enable the creation of customer loyalty, repeat purchases and repeat customer segment growth, one must start with knowing consumers expectations from a post-purchase experience. Consumer expectations vs. experience dynamics develop like in the illustration below.

“

To meet & exceed customers expectations, which will create consumer satisfaction and enable the creation of customer loyalty, repeat purchases and repeat customer segment growth, one must start with knowing consumers expectations from a post-purchase experience.

”



xii B. Ziegler, "Turning post-purchase into a competitive advantage"; so.digital; <https://so.digital/article/Turning-eCommerce-Post-purchase-into-a-Competitive-Advantage>. Accessed on 19.7.2020 at 16:55

xiii K.Manju, "Customer Satisfaction"; academia.edu; https://www.academia.edu/38351369/Customer_Satisfaction Accessed on 19.7.2020 at 17:01

There are at least seven types of consumer expectations such as :

- | | |
|--------------------------------------|------------------------------------|
| (1) explicit expectations | (5) technological expectations |
| (2) implicit expectations | (6) interpersonal expectations and |
| (3) static performance expectations | (7) situational expectations |
| (4) dynamic performance expectations | |

However, most important ones are first two - (1) explicit and (2) implicit expectations as they both directly and indirectly include all remaining types. ^{xiv}

So to understand what your consumers expectations are from your e-commerce post-purchase performance and experience you'll have to audit your own performance and compare it to what you explicitly say you will provide, and compare whether you under-deliver or over-deliver in real life.

While it is evaluated against your promises, your post-purchase performance is also evaluated against market averages. Since your customer also shop for other product categories with other retailers, all of those e-commerce post-purchase experiences he encounters collectively shape their implicit expectations from you. Your performance is also evaluated relative to others. This is where the need for competition-aware design of post-purchase experience and architecture of e-commerce supply chain and logistics operations arises.

“

Since your customers also shop for other product categories with other retailers, all of those e-commerce post-purchase experiences he encounters collectively shape his implicit expectations from you.

”



Competitive benchmarking of market level eCommerce post-purchase performance & own D2C post-purchase audit.

In order to architecture an e-commerce post-purchase that will delight your customers, not only do you need to meet & exceed explicitly communicated elements of the (promised) experience, but also continuously meet (and exceed) the minimum accepted market averages of the performance. The latter is impossible without a systematic assessment of competitive performance of post-purchase experience within a market and an audit of own D2C performance. Ability to design a high performing post-purchase experience starts with understanding own performance and relative position to the market averages.

“
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 ”

Methodology

Our benchmarking project is organized so that it captures the data on most important elements of post-purchase experience. Namely, post-purchase customer journey is divided into elements of: **tracking, delivery, packaging (out-of-box experience), returns & refunds**. This methodology follows the proposition set forth by the academic research papers mentioned above. Analysis of the performance is evaluated through answers on **more than 250 questions** which probe into each individual element of the experience. Our scorecard questions were also enriched with client provided questions. For example, in regard to recycling and payment options. In order to benchmark the individual performance to others, all answer levels for each individual question correlate do the interval value 1 – 4. In this way it is easy to compare relative performance of post-purchase experience between individual retailers.

DELIVERY	TRACKING	PACKAGING	RETURNS & REFUNDS		ALIEXPRESS	AMAZON	APPLE	
QUESTION		SCALE						
		1	2	3	4			
WI - Estimated Delivery Date & EDD Reliability - Is the EDD displayed at check out? <small>When ordering a standard order and after having filled in all address details what is the estimated delivery date. Please take screen shot of your order.</small>			expected delivery date communicated as range (Example 2-4 days)	expected delivery date communicated as a specific date	Provided, expected delivery date communicated as a specific date	Provided, expected delivery date communicated as a specific date	Provided, expected delivery date communicated as a specific date	
AE - Is the EDD displayed in the order confirmation email? <small>Communication to consumer via email after order is placed confirming that order is received by webshop. Please take screen shot of your order confirmation email.</small>	Not sent	Sent, but no expected delivery date information	Sent, with expected delivery date communicated as a range (example: 2-4 days)	Sent, with expected delivery date communicated as a specific date	Sent, but no expected delivery date information	Sent, with expected delivery date communicated as a specific date	Sent, with expected delivery date communicated as a specific date	
AE - Does the consumer receive a shipment confirmation email with EDD? <small>Communication to consumer via email after order is placed confirming that order has shipped from the warehouse. Please take screen shot of your shipment</small>	Not sent	Sent, but no expected delivery date information	Sent, with expected delivery date communicated as a range (example: 2-4 days)	Sent, with expected delivery date communicated as a specific date	Sent, but no expected delivery date information	Sent, with expected delivery date communicated as a specific date	Sent, with expected delivery date communicated as a specific date	

Benchmarking research is done through actual ordering of products from retailers' sites. Trained researchers go through the actual (post)purchase consumer journey recording each step of the process. For the current project 19 researchers in France have been used. 17 are based in Paris metropolis region. Remaining 2 are based in region of Lyon and Toulouse. In term of demographics researchers are evenly split across genders and in terms of age majority falls in the age group 25-34. It is important to note that demographic structure of researchers does not carry a significant impact on the results, as benchmarking research is not an opinion-based research but the factual, closed answer scorecard, analysis of the business processes. However, as researchers may add comments which may reflect their attitude / opinion on top of the factual recorded value, we always try to match as closely as possible client's consumer profile with our researchers' demographic profile. To gauge the market level performance, the research retailers' sample needed to be designed. Retailer's sample also needs to capture majority of online consumers and transactions. **Retailer's sample mix** is created through the following formula.

RETAILER'S SAMPLE MIX

[(TOP WEB TRAFFIC SHOPPING CATEGORY (SOURCE ALEXA.COM))] +
[ECOMMERCE REVENUE MARKET SHARE TOP (MULTIPLE SOURCES LIKE ECOMMERCEDB.COM)] +
[ECOMMERCE BUSINESS MODEL (PUREPLAY + MARKETPLACE + OMNI-CHANNEL)] +
[INDUSTRY COMPETITORS / CATEGORY LEADERS] + [CONSUMER PROFILE'S CHOICE]

For the general market sample, we select leading cross-industry representative according to the eCommerce revenue market share from eCommercedb.com database and other sources. We usually look at top 3 from each category. We cross-check it with Alexa.com highest traffic for the shopping category to solve for possible under-representation in revenue reporting. Resulting lists further need to satisfy the criteria of business model representation (marketplace, pure-player, omni-channel). In case they don't we select from previous list until this condition is met. eg. taking the retailer position 4 (instead of top 3) by revenue in certain category. In case of client based project, the client delivers a list of known direct competitors which is added to our general market list. To factor in direct shopping habits and other shopping site preferences of client's website audience, using the SimilarWeb tool, which tracks users' behavior across websites, we enrich our retailers' sample with "audience interest" websites from the shopping & eCommerce category with highest audience overlap. In total, 20 retailers constitute France market sample. Product selection was guided by the free threshold delivery basket order size as the guidance, disregarding the product type. Ordering rounds were done so that most of the researchers ordered from a single retailer. Couple ordered from two or more. Aside of the first round of orders to check for consistency in performance we had a second round for some retailers.

Based on previous formula, our market average e-commerce retailer's sample of cross-industry category and market leading e-commerce players is listed below in alphabetical order.

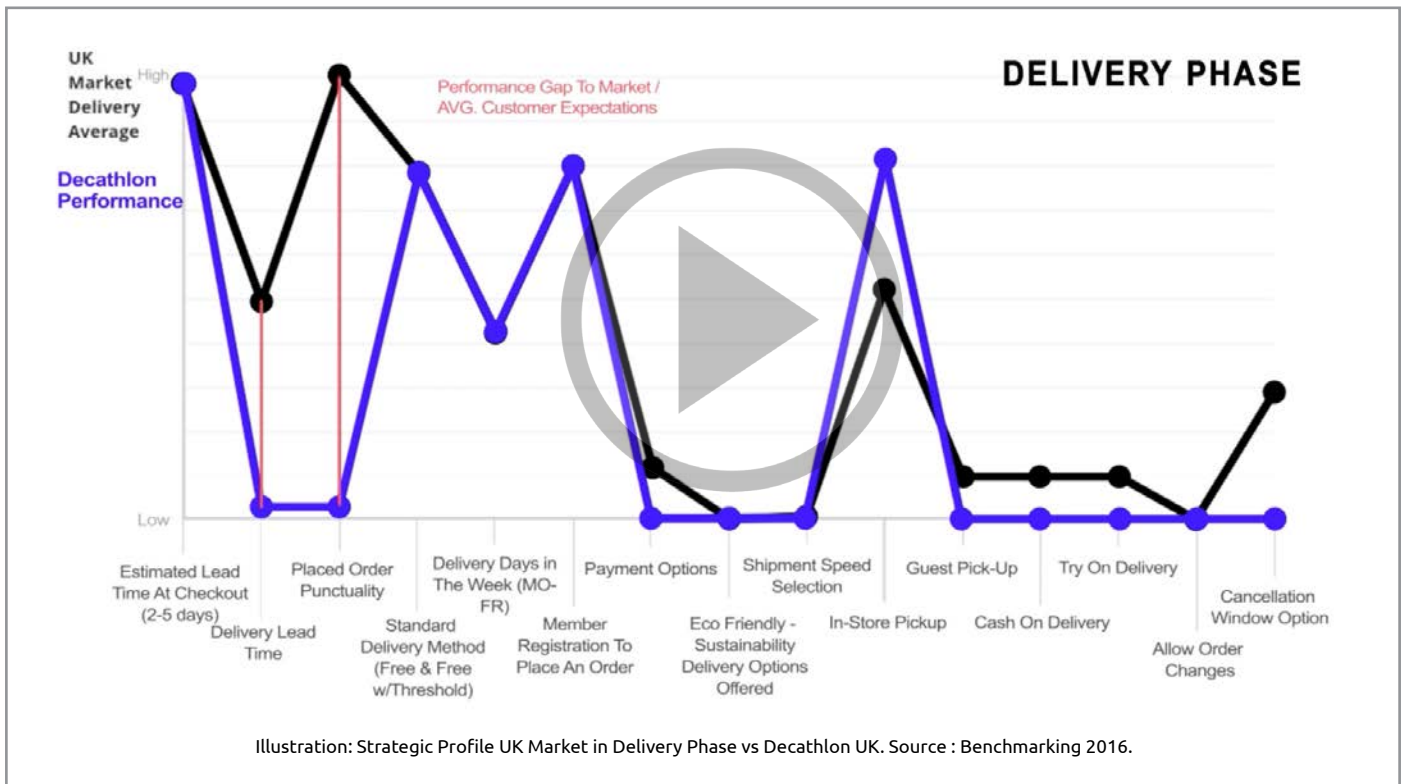
Benchmarked e-commerce retailers in 2020 in France: AliExpress, Apple, Amazon, Auchan, Carrefour, Cdiscount, L'Darty, Decathlon, E-Leclerc, Fnac, Ikea, Laderoute, Leroy Merlin, L'Oreal, Nike, Pandora, Sephora, Showroomprive, Veepee, Zalando, Zooplus.



Within a Tailored Competitive Reports service, we interpret data using different strategic and competitive strategy tools, toolkits and frameworks. For example, we use the Blue Ocean Strategy Canvas as a central diagnostic tool and an action framework that graphically captures, in one simple picture, the current strategic landscape of post-purchase performance and the future prospects for an organization.^{xv} Applied to the post-purchase performance data, the strategy canvas allows an organization to see in one simple picture all the factors an industry competes on and invests in, what buyers receive, and what the strategic profiles of the major players are. We look at each phase of the consumer journey (Tracking, Delivery, Packaging, Returns & Refunds) separately to define the strategic profile of players but also deduce “Basis of Competition” points^{xvi} Vertical axis of graphs scales between 1-4 which corresponds to the question / answers numerical value. Horizontal axis captures the questions/answers – points benchmarked. When creating market / industry averages points and graph, we take the individual questions’ maximum value (which represents the majority of retailers’ performance) and plot it accordingly on a graph. So, for example, in case 74% of retailers have a certain feature (say answer 3), we plot value 3 graphically on the vertical axis for this feature as market collective / average representative as it carries most weight.

^{xv} Kim, W. Chan., and Renée Mauborgne. Blue Ocean Strategy: How to Create Uncontested Market Space and Make the Competition Irrelevant. Boston, Mass.: Harvard Business School Press, 2005. Print.

^{xvi} Basis Of Competition, StrategicToolkits.com <http://strategictoolkits.com/strategic-concepts/basis-of-competition/>. Accessed on 22.7.202 at 19.02



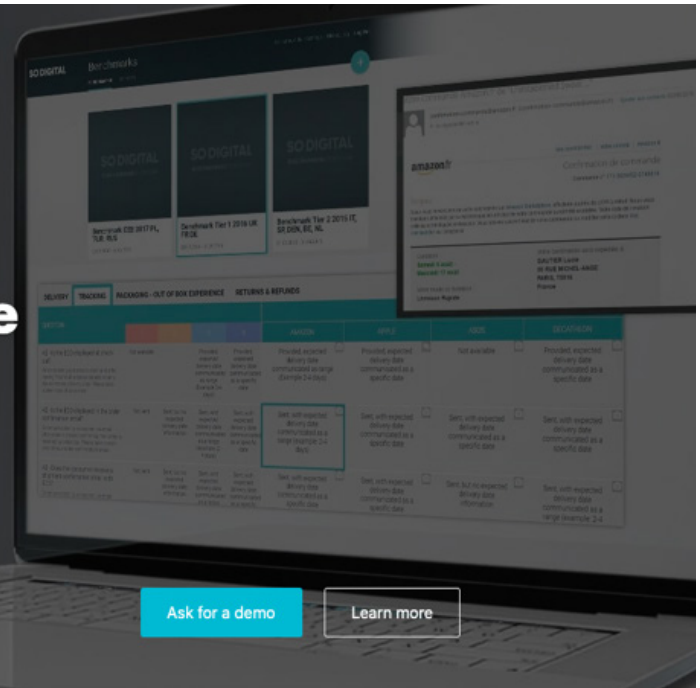
In this way we look at the majority of market average / representation for each point to simplify interpretation and conclusions. Otherwise it would be impossible to interpret data in a purposeful way as every point/question/feature, would graphically have at least 2 positions (74% and 26% in this case for majority/minority for a 100% total). Given that we're ultimately looking at consumers expectations which are shaped by the majority (of features and retailers) we believe this approach is best fitted for the purpose of this research. In addition to Strategy Canvas, we're also using Competitive Positioning Map. This radar graph style chart visually represents relative position of a company and its competitors to a same set of features – benefits customer receives. We use it to establish the relative performance of competitors / industry players to deduced basis of competition points – most important elements / features within a single post-purchase phase.

Research Results

Research results have been presented through the benchmarking platform. Data inputs from researches have been merged into a single benchmarking file available to the users and they represented integrated results. Integrated results also represent input from control (additional) rounds of orders which have been done for some retailers, while any deviations have been noted in comments. Consistency in experience (between orders) for each customer journey phase has been treated through a separate question as well for transparency. Data presented in benchmarking platform represent raw data input, which has only been processed for GDPR compliance – eg. personal data has been removed. Client has the ability within the platform to perform wide range of reports, per retailer, per post-purchase phase and across individual questions.

Global eCommerce Operations Excellence Platform

A management tool which helps direct-to-consumer teams formulate, evaluate, and improve their e-commerce strategies by providing a systematic assessment of competitive performance of post-purchase experience across markets.



The insights based on the research are shaped through three types of reports listed below.

Full Market Report: France. Summative textual and graphic overview of country research analysis & highlights. Determination of “basis of competition” points, market average strategic profile of post-purchase performance, as well as relative performance of (your) competitors to market average & basis of competition points. Market report is based on benchmarking research and enriched with external data sources (purchased and free) available online.

[ORDER NOW](#)

Brand D2C Report. Summative textual and graphic overview of (your) Brand’s D2C performance vs. 1) market average & average consumer expectations (strategic profile) 2) brand values based implicit consumer expectations 3) explicit communicated performance promises & expectations. D2C performance gaps identification to market average. D2C differentiation opportunities to market averages, industry and category competitors.

[ORDER NOW](#)

Strategic Improvement Proposal: Brand D2C France. Building up on the findings and conclusions of Market Report and Brand D2C Report, integrating the client’s feedback about the short-term and long-term feasibility of performance adjustments (operational, capability, and budget constraints) report classifies improvements into ‘must win’ elements (basis of competition points gaps improvements in short and long term), “quick wins” (achievable with minimum effort, but value adding) and “ideal case” (theoretical best case design model of post-purchase experience).

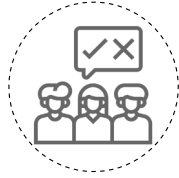
[ORDER NOW](#)

TRACKING



43%

of avg. market sample * retailers **did not send a delivery confirmation email**



Only

9%

Only 9 % of avg. market sample * retailers uses **SMS text message** with tracking link, while **85 %** sent **email updates with tracking link.**



43%

of avg. market sample * has **a detailed overview** of drop off delivery (stations to delivery) tracking enabled in the mobile app. 61% of couriers have a similar featured app as well.



Only

33%

of avg. market sample * retailers **asked consumers** to provide **delivery experience feedback** through any of the tracking methods



60%

of avg. market sample retailers* send a **shipment confirmation email without an Expected Delivery Date** information

DELIVERY



For **50%**

of average market sample* delivery lead time (estimated time of delivery at the check-out) for free standard delivery is **longer than 6 days.**



However

40%

of avg. market sample actually delivered in **3 days**



Only Apple

4,5%

of avg. market sample actually delivered in **1 day**



Almost

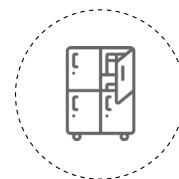
60%

of avg. market sample * offers paid **EXPRESS delivery**



81%

of avg. market sample * **does not** have an option of **NEXT DAY delivery** either paid nor free (w/thresh-old)



50%

of avg. market sample* has **ALTERNATIVE PICK UP LOCATIONS** as delivery option

PACKAGING



63%

of the avg. market sample * retailers have an **easy open** mechanism for their e-commerce packaging



86%

of the avg. market sample * do not have have **gift wrap** offering, while **76%** do not have **gift messaging** option



0%

of the retailers in the avg. market sample * included **personalised messaging** in the packaging



Only

36%

of avg. market sample * **have branding** on the outer box packaging



0%

of the avg. market sample * included **an unexpected gift (promotion / free item)** in the packaging

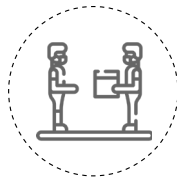
RETURNS & REFUNDS



For

76%

of avg. market sample * retailers, consumer has to go online to **register** his return and **print the return label**



Only Amazon & Nike or

9%

of avg. market sample * retailers offers a **collect at home** service as the option where you can have the carrier pick up your return at your home.



85%

of avg. market sample * retailers **provides a refund visibility** - a way in which a consumer can track the refund process (through a status on retailer website, consumer profile, e-mails etc.)



For

38%

of avg. market sample * retailers the **refund lead time** - time it takes from the moment a consumer sends back the parcel until the moment the money arrives to his account is **more than 14 days**, with longest 3 (out of 21) taking **29, 23 and 16 days**

Audit own performance vs Market Average and Basis of Competition points

How does your D2C post-purchase performance compare to leading market e-retailers, competitors and most importantly market average and average consumer expectations? Where are you over-investing and where are you under-investing when it comes to experience that will meet basis of consumers' expectations in France? What are your gaps to average performance? What are the basic, most important elements and levels of performance of post-purchase experience that you must have? All of these insights are available within our service of **Own D2C Audit**.

[LEARN MORE](#)

Competitors vs Market Average

Are your competitors outcompeting you on the post-purchase experience? How do they perform comparatively to market average and the most important elements of post-purchase experience? What does their post-purchase experience look like and what do they do to delight customers? Are they more (mis)aligned to market average than you are? All of these insights are available within the **Competitor vs Market Average** audit services.

[LEARN MORE](#)

Audit own performance vs Brand based expectations

As a brand you make promises to customers. A brand promise is a value or experience a company's customers can expect to receive every single time they interact with that company. The more a company can deliver on that promise, the stronger the brand value in the mind of customers and employees. Brand is an outcome of positive fulfillments on brand promises. eCommerce post-purchase experience is no different – consumers hold brand based expectations from their interaction with you. Are you delivering on your brand promised experience in eCommerce post-purchase? Make sure you do by using our **Brand Based Expectations Post-Purchase Audit service**.

[LEARN MORE](#)