



STELLAService

The Authority for Online Customer Service

Comparing the Online Experience: The Big Three Pizza Chains

September 2010

Executive Summary

The nation's three biggest pizza chains – Domino's, Pizza Hut and Papa John's – are aggressively competing for the biggest slice of the e-commerce pie. The multi-billion dollar online pizza ordering market has continued to grow as American consumers enjoy the time-saving process of clicking their way, either via mobile phone or personal computer, to a freshly delivered pizza.

As competition escalates, so does the importance of providing great online service. A recent American Express study found that Americans will spend 9% more with companies that provide excellent service, and 81% are likely to give a company repeat business after a good service experience. There's a lot at stake for the big three chains when it comes to the quality and consistency of the online customer experience, and consumers continue to stress their desire to only do business with companies that provide great service.

In an all-encompassing evaluation of the online service performance of each major pizza chain, STELLAService – the first and only independent provider of customer service ratings for online business – found that Domino's Pizza provides the highest quality online service among its close peers.



Findings

STELLA Ratings

	Domino's	Papa John's	Pizza Hut
Online Tools	85	72	86
Delivery	96	98	99
Customer Support	77	61	58
STELLA Rating	86	77	81

Key Metrics

	Domino's	Papa John's	Pizza Hut
Online Tools			
Virtual Pizza "Building" Tool	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Order Tracker	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Guest Checkout	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Credit Card Tip Option	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delivery			
<i>Delivery Person Attributes</i>			
Friendliness	4.0	4.2	4.4
Professionalism	4.2	4.2	4.4
Delivery Within Est. Time	80%	80%	100%
Avg. Delivery Time (h:mm:ss)	0:32:00	0:36:00	0:34:00
Customer Support			
Phone Support:			
Issue Resolution	4.0	3.6	3.0
Professionalism	3.4	3.5	3.0
Email Response %	100%	0%	0%
Avg. Hold Time (h:mm:ss)	0:00:16	0:00:17	0:00:07

Social Disconnect

Not one company replied to customer service inquiries sent via Facebook and Twitter*

*Each company was sent two messages through both Facebook and Twitter



Tools & Features

Visual Aids

BUILD YOUR OWN PIZZA



1. CHOOSE SIZE & CRUST

Large(14") Hand Tossed

2. CHOOSE TOPPINGS

CHEESE & SAUCE

Cheese

Sauce

Robust Inspired Tomato Sauce

Hearty Marinara Sauce

BBQ Sauce

White Sauce

MEATS

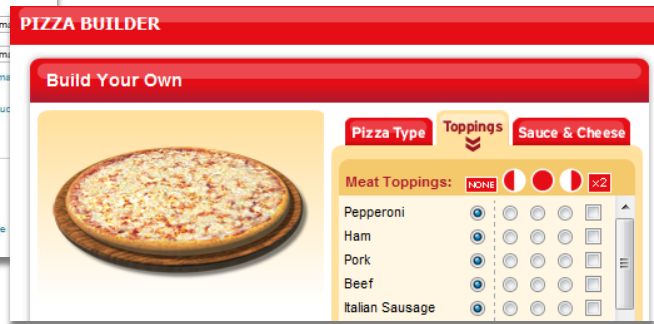
Pepperoni

Italian Sausage

Sliced Italian Sausage

Beef

Domino's and Pizza Hut both offer dynamic Pizza "Builders"



Foreign Countries

Online ordering available in US, UK, Canada, Mexico and S. Korea



Pizza Hut's "MY HUT"



"MY HUT" saves favorites and shows order history

Domino's Tracker



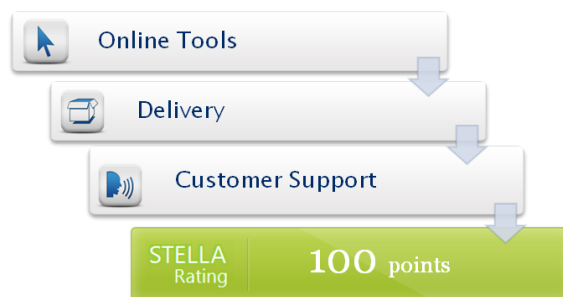
Domino's "Tracker" shows real-time pizza creation progress

Methodology

The STELLAService Methodology (“the Methodology”) is used to evaluate the customer service quality of online businesses. Online service performance encapsulates all interactions between consumers and online businesses that contribute to the overall customer experience. The Methodology incorporates both “service” and “system” components and includes both objective and subjective analyses. Service components emphasize the human elements of an online business while system components stress the technological elements. Designed to be an intuitive and natural assessment of the online customer experience, the Methodology mimics real conditions, environments and encounters experienced by online consumers.

The Methodology used in this study includes an analysis of over 200 service and system attributes of an online food ordering business, each of which falls within one of the following three areas: (1) Online Tools; (2) Delivery; and (3) Customer Support.

Online Ordering Experience



ONLINE TOOLS (1/3):

Online tools includes the overall ease-of-use, convenience, logic and efficiency of the online ordering experience. For example, we evaluate, among other things, the form and content of landing pages, navigation and search performance, product building and information, delivery options, social media tools, shopping cart features and checkout processes.

DELIVERY (1/3):

Delivery includes the customer experience as it relates to receiving the order and interacting with pizza delivery personnel. Specifically, we evaluate the Web site’s stated policies and compare them to the actual experience of receiving a pizza delivery.

CUSTOMER SUPPORT (1/3)

Customer support includes the detailed and overall performance of customer service representatives (CSRs) through calls, emails and social media engagements. We measure the availability, responsiveness, product knowledge, business operations knowledge and other key metrics.

STELLA Ratings are not fixed, and they are subject to change if an online business revamps its site, deactivates or activates relevant features, or adjusts its customer service offering. The STELLA Ratings are also subject to change based on periodic enhancements to the Methodology. Visit www.stellaservice.com for more information.

About Us

STELLAService is the first and only company dedicated to publishing objective, in-depth ratings on the customer service performance of online businesses. STELLAService adheres to the highest evaluation standards; it does not inform businesses of the timing of its evaluations and pays for all items purchased from each Web site it evaluates. Businesses cannot influence the ratings in any way other than providing consistently great customer service.

The invaluable data obtained by STELLAService is used by consumers to make more informed online purchasing decisions and by companies to obtain crucial business and industry intelligence. Formed in April 2009, the company's Advisory Council and highly trained analysts represent today's thought-leaders in the area of online customer service.



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