The Connecting with Customers Report

A global in-depth study of the online customer experience
Executive summary

The growth in e-commerce, social media and mobile devices means that today, more than ever, online shoppers are faced with a multitude of choices in the way they connect with brands. The cost of attracting website visitors continues to increase, evidenced by levels of investment in SEO (search engine optimisation), and keeping them engaged is becoming more and more challenging for businesses. Add to this a more fragmented approach to shopping amongst consumers, where multiple channels are used interchangeably in order to optimise value for money and convenience then the challenges further multiply. While the Internet may at its heart be a self-service environment, increasingly the lines between in-store and online experiences are blurring (the phenomenon of “channel blur”), and online retailers need to re-evaluate their customer engagement strategy to capitalise on this channel blur in order to compete in an increasingly crowded and competitive web-space.

Specifically, almost 6000 online interviews were conducted with online shoppers across the UK, US, Australia, Germany, France and Italy at the end of 2012.

The research finds that as online shoppers are becoming more adept with their use of digital channels, their expectations are changing. They are looking for personalised online experiences yet crave speed and simplicity. Some may not actively seek out online help, but many admit to needing it at many stages in their online purchase journey. They want a choice of multiple channels for sales and customer service, but may not use them all. They will ask for help, but they won’t wait long for a resolution before they go elsewhere. The research also identifies varying levels of sophistication, highlighting three different types of online shoppers, each of which requires differing levels of support during their online purchase journey.

In order to gauge the extent to which in-store and online experiences are blurring and what consumers now look for in an online shopping experience, LivePerson commissioned Loudhouse to conduct quantitative research amongst online shoppers across the world, exploring online attitudes and behaviours.
A global in-depth study of the online customer experience

- Dependent shoppers – these are shoppers with limited experience of online shopping, who often need help and support

- Semi-dependent shoppers – these are shoppers who are fairly experienced when it comes to shopping online but who sometimes need help and support from others

- Experienced shoppers – these are experienced online shoppers who rarely need support from others

Traditionally, call centres and email have been the “go-to” customer service platforms for online shoppers. Now customers want more choice and are driven by a need for speed and simplicity. This research also points to Live Chat as meeting these needs, and emerging as a preferred engagement channel, generating higher levels of customer satisfaction, an increased likelihood to purchase from a website, more customer loyalty and enhanced trust in a brand.

Recommendations

The results point to a need for brands to re-evaluate how they connect with customers across channels. We recommend the following:

- Reassess any gaps between the in-store and online customer experience environments, particularly in the area of online customer service

It is clear that while the Internet may have begun life as a self-service environment, it has evolved, along with customer expectations, into a far more interactive space where relationships between brands and consumers can be strengthened with appropriate engagement strategies.

Companies with both online and physical channels need to focus on closing the gap between in-store and online environments, embracing channel blur and adopting strategies to reduce website abandonment and increase website stickiness. Websites, mobile platforms and stores should not be run as individual entities but as interacting channels to support and benefit each other.

- Make online customer experience a priority

More and more, online consumers are impatient when trying to purchase online. Many expect answers to their problems instantly, similar to the type of help they would get in-store, suggesting that email and phone customer services alone are not sufficient. Not only will online shoppers leave a website if they do not receive the right customer experience, they may turn to a competitor to meet their needs instead. The key is to engage customers throughout their online journey, both pre- and post-purchase.

- Offer a variety of online customer support channels (e.g., live chat, click-to-call, social media, email, etc.)

One area where this is particularly important is in the provision of help and support both pre- and post-purchase to online customers. Offering a choice of support methods, focusing on speed of response and providing an easy resolution to issues are vital for online brands wanting to ensure that their customers feel valued and listened to, whilst increasing their spend and their loyalty.
A global in-depth study of the online customer experience

Key research findings

The research highlights three key trends amongst online shoppers today which influence how brands connect with their customers.

**Channel blur**

Shoppers are using online, in-store and mobile channels interchangeably in order to make informed purchase decisions, maximising convenience and getting the best possible deals. However, there are gaps between these channels when it comes to customer engagement.

**Key findings that relate to this trend:**

- 78% of online shoppers often or sometimes research online before shopping in store
- 1 in 4 shoppers (24%) research on their mobile while in store
- 39% of online shoppers now spend the same or more online as they do in stores
- Although impulse shopping is more associated with stores, 50% of shoppers say that they often / sometimes end up buying more than they planned online

**Abandonment abounds**

Faced with a plethora of competitive website options, shoppers are becoming more demanding in their online shopping preferences. If they can’t find what they need easily or access help quickly and effectively on a website, they will go elsewhere. Customer engagement is known to increase customer spend and loyalty, and is paramount in the quest to reduce abandonment rates.

**Key findings that relate to this trend:**

- The top reasons for abandonment of online purchases:
  - Unexpected delivery costs (70%)
  - Lack of information about product / service / delivery (56%)
  - Navigation difficulties (46%)
  - Difficulty with online customer service/support, e.g., wanting to ask a question or not finding the answer (37%) and difficulty in getting any help on the website (30%)
- 83% admit they need some form of support during their online journey
- 51% either try once or give up immediately when seeking help before an online purchase
- 71% expect to be able to access help when purchasing online within five minutes – 31% expect help to be immediate
- If a response is not delivered in the expected timeframe, 48% of shoppers will either go elsewhere or abandon the purchase altogether
Great expectations of the online experience
As the adoption of online channels continues to grow, consumer expectations are becoming increasingly refined. Consumers today have very clear demands when it comes to their ideal online experience, with speed, simplicity and the availability of information emerging as key pre-requisites.

**Key findings that relate to this trend:**
- Shoppers are generally less satisfied with online customer service (67%) than in-store (77%)
- The three key elements of a great online customer service experience are getting an issue resolved quickly (82%), getting an issue resolved in a single interaction (56%) and dealing with a friendly customer service representative (45%)
- 59% would like to have more choice in how they contact online brands, whether this is via a call centre (61%), email (60%) or Live Chat (57%)

Differentiating through “real-time”
The immediacy of receiving assistance is ultimately a differentiating factor for many consumers. With ever increasing demands on their time, consumers place a high value on getting issues resolved instantaneously.

A speedy resolution is not always a given when accessing help via call centres or email, but Live Chat is found to meet customer requirements for speed and simplicity. This increases the likelihood of purchase, return visits and enhanced levels of customer trust in the brand.

**Key findings that relate to this trend:**
- 93% see real-time help being beneficial during their online customer journey, whether it’s before, during or after their purchase process
- 73% of customers are satisfied with Live Chat, compared with email and telephone (both 61%)
- 51% state that they are more likely to purchase from a website if they could get answers via Live Chat. 48% say they are more likely to return to a website and 41% say they are more likely to trust a brand if Live Chat is available
Channel blur

Consumers are now able to shop anywhere, anytime with any device. They are using online, in-store and mobile channels interchangeably in order to make informed purchase decisions, maximise convenience and get the best possible deals. This presents significant consistency challenges for brands. Ultimately, brands must marry “bricks” and “clicks” to offer a multi-channel brand experience to meet customer needs, and maximise revenue and market share.

Figure 1 shows that 39% of online shoppers globally now spend the same amount or more online than they do in store during a typical month. This figure increases to 53% in Germany and 47% in US, while Italy (31%) and France (27%) are lagging somewhat behind. Digital natives, those aged 18-34 years who have grown up with the Internet are leading the way in terms of relative spend online. 50% of this group now spends the same or more online than in stores, in sharp contrast to the over 55s where this figure is just 26%.

Figure 1. Relative monthly spend online versus in-store

While certain characteristics clearly differentiate online and store shopping environments, the basic needs for value for money, convenience, choice and efficiency apply whatever the channel. The top reasons for spending more in-store include the ability to see, touch, and feel goods (82%), the ability to go back to a store if there are any problems (58%), and the immediate need for the product (56%). The top reasons for spending online are largely convenience related—the ability to shop whenever they like (92%), the ability to shop without travelling to a store (71%), and being able to research and find the best products for the consumer’s needs (71%). The factors that motivate in-store purchases give insight into how online retailers might enhance their online customer experience: by offering consumers the option to connect directly with an online agent post-purchase; providing greater product detail via high resolution pictures; or adopting more innovative practices, such as providing video demos, or webcam sessions with a product expert.

Consumers’ online and offline behaviour is seen to be converging when it comes to certain shopping habits. One area more traditionally associated with store environments is “impulse shopping” where customers buy more items than originally planned. Figure 2 shows that in-store consumers indulge in impulse shopping to a great extent –

Figure 2. Frequency of impulse shopping online versus in-store
77% often or sometimes doing it. It is a lesser, but still significant trend among online shoppers. Half (50%) say that they often or sometimes buy more than they planned to online. Digital natives (aged 18-34 years) again are leading the way (59%), while the over 55s are less likely to impulse shop (36%). Experienced shoppers – those who are highly sophisticated online and who serve as knowledgeable advisors to others, are also big impulse shoppers (62%). Brands that recognise this increasing propensity to impulse shop online will respond accordingly, offering attractive online “shop windows”, easy browsing, personalised offers and suggesting additional items at various customer touchpoints.

*Figure 3* shows the frequency with which shoppers are researching online before shopping in-store. More than three-quarters of shoppers (78%) say that they often or sometimes shop in this manner, increasing to 82% in digital natives (aged 18-34 years). Experienced shoppers are also particularly likely to adopt this shopping strategy (89%). This is an important group to acknowledge as they are high online spenders (60% spend the same or more online than in store) and take it upon themselves to advise, and thereby influence, others when it comes to online shopping.

*Figure 3. Frequency of researching online before shopping in-store*

There is no doubt that mobile devices are revolutionising how people shop, yet the shopping process that consumers follow remains largely unchanged – moving from research to selection to payment. *Figure 4* shows that around one in four shoppers (24%) now use their mobile to research their purchase while in store. Mobile commerce is likely to grow as consumers use their mobile devices in new and different ways and retailers respond in turn with mobile innovations and more compelling mobile experiences. Research on mobile devices in store is particularly common amongst digital natives (38%) but almost unheard of among the over 55s (7%). This again is a behaviour that is more prevalent amongst experienced shoppers (39%), with the potential to influence the behaviour of others.

*Figure. 4. Frequency of researching via mobile in-store*

The growing popularity of QR codes, online ordering with in-store pick-up, as well as in-store kiosks highlights how some brands are embracing channel blur and both optimising and integrating the customer experience across channels.
Abandonment abounds

Shopping cart abandonment is every online brand’s nightmare. Brands manage to get a potential customer onto their website, the customer adds items to a shopping cart and then doesn’t purchase. Abandonment is a key measure of e-commerce success and something that all online brands need to monitor, understand and try to prevent.

Figure 5 shows that the key reasons for abandoning online purchases are unexpected delivery costs (70%) and lack of information about the product, service or delivery (56%). Navigation difficulties (46%), wanting to ask a question / not finding the answer (37%) and difficulty of getting any help on the website (30%) are also driving potential customers away.

Central to many reasons for abandonment is difficulty in accessing information that shoppers feel they need to complete their purchase. Not surprisingly, 83% of shoppers admit they need some form of support during their online journey. This increases to 88% among Italian shoppers and is a particular issue for dependent shoppers, those with limited experience of online shopping, where this increases to 90%.

Shoppers admit they need some form of help or support when shopping online, but they are not generally very persistent in accessing this help. In fact, half of online shoppers (51%) will either try once or give up immediately when seeking help before an online purchase. This is particularly the case in Germany (57%), the UK (55%) and Australia (54%), dropping to 36% in Italy where shoppers appear to be more forgiving. It is worth noting that while half of online shoppers will not persist to get help prior to a purchase, if they need help post-purchase, shoppers are prepared to persist to get their issue resolved, 76% trying at least twice.
Great expectations of the online experience

For many businesses, the Internet is intended as a self-service environment, and offers a channel to reach new customers, a way to reduce costs and increase margins. However, some brands are recognising that once product and price are taken out of the equation, customer service is one area that can truly differentiate one online brand from another.

Currently, physical stores tend to outperform their online counterparts in satisfying customers. Some 77% say that they are generally satisfied with customer service in-store, compared to 67% online. This is a key opportunity for online brands to close the gap between the store and online customer experience, and consider ways to enhance their online strategy in order to secure shopper trust and loyalty.

Figure 6 shows that, when accessing help online, customer expectations are high. 71% expect to be able to access help when purchasing online within five minutes (increasing to 81% in the US), whilst 31% expect help to be immediate. More worrying still is that if a response is not forthcoming in the expected timeframe, almost half of online shoppers (48%) will either go elsewhere or abandon the purchase altogether, increasing to 58% in the UK.

Figure 6. Customer expectations in accessing help online

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Immediately</td>
<td>31%</td>
</tr>
<tr>
<td>Within 5 minutes</td>
<td>40%</td>
</tr>
<tr>
<td>Within 30 minutes</td>
<td>11%</td>
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<td>Within an hour</td>
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<td>Within a day</td>
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<td>Within a week</td>
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The stakes are high. Abandonment rates are on the rise, as shoppers become more comfortable comparing prices and product or service attributes. Providing timely and relevant information and help to shoppers is a key weapon in the war against abandonment.

Figure 7 shows the elements that shoppers believe constitute a great online customer experience. The top three factors are getting an issue resolved quickly (82%), getting an issue resolved in a single interaction (56%) and...
dealing with a friendly customer service representative (45%). Time is a key issue for shoppers and while people don’t necessarily go onto a website expecting to need help, should the need for support arise, speed and simplicity must underlie any online customer service interaction.

Aside from speed and simplicity, choice is another key driver of online customer engagement. Shoppers have a wealth of choice when it comes to where and how to shop and who to buy from. Not surprisingly, they would now like this choice extended to customer service interactions. 59% say they would like to have more choice in how they contact online brands.

Figure 8 shows the sources of help that online shoppers would like to see made available.

Figure. 8. Help sources customers would like to see

- Telephone number to call customer services: 61%
- Email to customer services: 60%
- Live chat (click to chat to get live assistance): 57%
- FAQs (Frequently Asked Questions section on website): 51%
- Click to call (agent calls the customer once number is entered online): 34%
- Online customer forums / communities run by the brand itself: 17%
- Short recorded video clips of help and advice: 12%
- Live video chat with a customer service representative: 7%
- None of the above: 16%

There is now demand for emerging, real-time channels such as Live Chat (57%) to be available alongside the more established customer service channels such as call centres (61%) and email (60%). There is also emerging interest in more innovative channels, with 34% stating they’d like to use click-to-call (agent calls the customer once number is entered online), 12% would like to access recorded video demos, and 7% would like live video chat with an agent to access help. Demand for Live Chat is evident across all three shopper types – experienced shoppers are most likely to demand it (71%), although semi-dependent shoppers (58%) and dependent shoppers (49%) would also like to have Live Chat available.

The research highlights the importance of optimising the customer service strategy – focusing on speed, simplicity and choice in order to effectively engage customers, drive loyalty, and deliver true differentiation from both online and offline rivals.
Differentiating through “real-time”

In a store, if a customer needs help they can look around and find someone to assist them at that moment. Until recently, in an online environment, the only sources of help have been to contact a call centre and potentially endure long wait times, or perhaps to email customer services, and wait for them to respond. Today, with the advent of social media and the emergence of tools such as Live Chat, consumers are able to interact with brands in a range of different ways, depending on the nature of the query. There is an increasing expectation to be able to access help in real-time. In fact, 93% see real-time help as being useful when shopping online.

Figure 9 shows the scenarios in which shoppers see real-time help as being useful. The top scenario is if there is a problem post-purchase (50%) when a resolution is paramount. Other applications are seen throughout the research-selection-payment process, and the provision of real-time help prior to purchase could logically reduce the need for post-purchase support as online shoppers will make more informed purchase decisions in the first place.

**Figure 9. Scenarios in which real-time help seen as useful**

- If there was a problem with the product / service after I had bought it: 50%
- If I can’t find the answer to my question in the FAQ section: 46%
- If I have problems logging into my account: 45%
- If I want detailed information on a product / service before I buy online: 43%
- If I am having problems with checkout / payment: 42%
- If I want to ask about delivery / shipping: 38%
- If I have a question about the status of my order: 34%
- If I wanted to make any kind of complaint: 33%
- If I want basic information on a product / service before I buy online: 32%
- If I want to ask about the returns / refund policy: 27%
- If I want to hear about any discounts or promotions: 17%
- If I want to manage my account / pay a bill: 16%
- If I need to enter personal / sensitive information before I buy it: 14%
- None of the above - don’t see it as useful: 7%
Although call centres and email are more well-established as customer service channels, online shoppers are seeing very real benefits from using tools such as Live Chat. In fact, Live Chat generates the highest satisfaction levels among those surveyed. Figure 10 shows that Live Chat generates the highest overall satisfaction at 73%, with call centres and email standing at 61%. Actual resolution of an issue has been highlighted as a core element of a great online customer experience and again Live Chat is seen to result in higher levels of user satisfaction (71%) than either call centres (64%) or email (61%). Live Chat is also perceived to require less effort on the part of the customer – 54% saying it involved a low level of effort, compared to 37% for call centres and 46% for contact via email. The Customer Effort Score (developed by Harvard) has been found to have strong predictive power when it comes to re-purchasing and highlights that it is increasingly important for brands to make it easy to be a customer.

The provision of Live Chat as part of the online customer service toolkit can potentially reap big rewards for brands looking to boost the stickiness of their websites. 51% of online shoppers say they would be more likely to purchase from a website if they can get answers to their questions via a Live Chat conversation. 48% say they would be more likely to return to a website if click-to-chat / live help is available, and 41% say they are more likely to trust a website that has Live Chat available.
Conclusion

As online shopping continues its rapid global growth, consumers are becoming more sophisticated and demanding in what they expect from online retailers. The situation is only made more challenging for brands by the evolution of multi-channel environments and the need to close the gap between online and in-store offerings, in terms of product, price and customer service.

While consumers are shopping in ever smarter ways, harnessing the opportunities that social media and mobile technology bring, they are also looking for retailers to keep pace with these changes. With many pressures on people’s time whether through longer working hours or more leisure choices, speed and simplicity are the operative words for consumers needing to effectively navigate a growing array of shopping choices.

Armed with a physical advantage, stores still lead the way in offering a superior customer service experience, with online retailers now waking up and offering a choice of ways for consumers to interact with them. Listening to customers is at the very heart of a successful online engagement strategy and something that brands can no longer afford to ignore as the marketplace becomes more crowded and competitive. Purchase abandonment is a very real concern for online brands, especially as consumers are expecting a real-time response to any issues they have.

Online customers have set the challenge. They want a customer experience that has speed and simplicity in every interaction. They are not willing to wait for an action and they are not prepared to expend energy trying to resolve a problem. Rather than letting this translate into website or shopping cart abandonment, or brand distrust, retailers must actively address their online customer service platform.

Live Chat can play a critical role in addressing all of the aforementioned concerns. By offering the choice of real-time help, online businesses can do more than just prevent website abandonment. They can effectively support customers throughout their entire online journey, increasing sales, building customer trust and cementing loyalty.
Country comparisons

**Online shopper profile**

The research finds that there is significant variation in the level of sophistication amongst online shoppers across the markets surveyed. All countries have between 10% and 20% of shoppers in the “experienced” category, being advanced online users able to advise others. Germany has the most online shoppers in the “semi-dependent” category (71%), being largely self-sufficient but sometimes needing help whilst Italy has the highest proportion of “dependent” shoppers, with limited experience of online shopping and often needing help and support.

**Online versus in-store spend**

Germany (53%) and the UK (47%) are leading the way in relative spend online compared to in-store, whilst France (31%) and Italy (27%) are least likely to spend the same or more online compared to in-store. This explains, in part, the higher levels of online sophistication seen in the UK and Germany compared to other European markets.
**Satisfaction with online customer service**

The US is more likely to say they are satisfied generally with customer service when shopping online (70%), although in all markets satisfaction lags behind that experienced in-store. Satisfaction with online customer service is lowest in Australia (64%) which also expresses the lowest levels of satisfaction with customer service received in-store.

**Difficulty in getting help a driver of abandonment**

Whilst navigation difficulties are the biggest reason for shopping cart abandonment across all markets, other reasons cited point to difficulties in accessing timely and relevant information online. Across all markets, 30% of online shoppers cite difficulties in getting any help online as a reason for abandonment. This is most likely in Australia (36%) where online shoppers also express the lowest levels of satisfaction within online customer service. The US (26%) and Italy (24%) are the least likely to mention a difficulty in getting any help as a reason for abandonment, although other issues raised such as a lack of information about product / service / delivery do point to a need for more accessible help when shopping online.
Low effort expended in accessing help online

Overall, more than half of online shoppers (51%) will either give up immediately or try only once to access help when shopping online. Germany (57%), UK (55%) and Australia (54%) are the most likely to give up quickly when seeking help pre-purchase, whilst those in Italy appear much more persistent in their quest for help (only 36% giving up immediately or trying only once).

Expectation for accessing help online

Five minutes is the critical time frame; 71% of online shoppers expect to be able to access help online within this time frame. There are significant regional differences here, however. US online shoppers are particularly focused on this five minute window (81%), followed by the UK, France and Italy (all at 73%). Most interesting is the fact that although German online shoppers are the least likely to persist beyond one attempt at accessing help, they actually have lower expectations in terms of the time frame for accessing online help (just 48% expect to get help within five minutes).

Demand for Live Chat

The US leads the way in demand for Live Chat (69%), followed by the UK (60%) and Australia (60%) whilst demand is lower, but still significant, amongst German (38%) and French (34%) online shoppers.
Country Profiles

US
UK
France
Germany
Italy
Australia
A global in-depth study of the online customer experience

US

Shopper dependence profile

18% of US shoppers can be described as experienced, highly sophisticated online shoppers who serve as knowledgeable advisors to others, with a further 59% being semi-dependent shoppers (fairly experienced but sometimes needing help and support from others).

Channel blur

In the US, 40% of online shoppers now spend more or the same online as they do in stores, closely aligned to the global average of 39%.

Online impulse shopping on a fairly regular basis is seen amongst almost half (49%) of US online shoppers.

US shoppers are more likely to be satisfied with the customer service they receive in store than other markets (78%) with 70% saying they are satisfied with customer service they typically receive when shopping online. 37% of US shoppers actively seek out help in store, whilst 17% do this when shopping online.

US shoppers are likely to research online before shopping in store (77% compared to 78% at a global level) whilst 28% research on their mobile whilst in store, the highest of all countries in the survey.

Abandonment abounds

In the US, the key reasons for shopping cart abandonment are unexpected delivery costs (71%), lack of information about product / service or delivery (56%), navigation difficulties (44%), wanting to ask a question and not being able to find the answer (34%). Difficulty in getting any help on a website is a reason for abandonment for 1 in 4 US shoppers (24%).

82% of US shoppers admit they need some form of help during their online purchase journey.

50% will try only once or give up immediately when seeking help before an online purchase and 81% expect to be able to access help within 5 minutes, higher than the global average of 71%. 36% expect to get help immediately, again the highest of all the countries in the survey. 42% of US shoppers will shop elsewhere or abandon a purchase altogether if they don’t get help in their expected timeframe (compared to 48% globally).

Moving forwards

Speed and simplicity rule for US shoppers when it comes to a great online experience. 82% prioritise getting their issue resolved quickly and 66% want to see their issue resolved within a single interaction, ahead of the global average of 56%. 54% also want to deal with a friendly customer service representative, higher than the global average of 45%.

57% of US shoppers would like more choice in how they contact online brands. 53% demand email, 63% demand call centres and even more expect to see Live Chat (69%), higher than the global average of 57%.

94% of US shoppers see real-time help as useful when shopping online.
UK

**Shopper dependence profile**

19% of UK shoppers can be described as experienced, highly sophisticated online shoppers who serve as knowledgeable advisors to others, with a further 54% being semi-dependent shoppers (fairly experienced but sometimes needing help and support from others).

**Channel blur**

The UK has the second highest proportion of shoppers who spend the same or more online as they do in stores (47%), with only Germany higher (53%). Online impulse shopping on a fairly regular basis is seen amongst almost half (47%) of UK online shoppers.

UK shoppers are more likely to be satisfied with the customer service they receive in store than other markets (79%) whilst only 68% say they are satisfied with customer service they typically receive when shopping online. Interestingly, despite a relatively positive view of in-store customer service amongst UK shoppers, only 27% say they actively seek out help in store (compared to 33% at a global level) and UK shoppers are the least likely to seek out help online at just 13%.

UK shoppers are particularly likely to research online before shopping in store (83% compared to 78% at a global level) whilst 22% research on their mobile whilst in store.

**Abandonment abounds**

In the UK, the key reasons for shopping cart abandonment are unexpected delivery costs (77%, higher than the global average of 70%), lack of information about product/service or delivery (60%), navigation difficulties (58% and higher than all other countries) and wanting to ask a question and not being able to find the answer (47% compared to a global average of 37%). Difficulty in getting any help on a website is a reason for abandonment for 1 in 3 UK shoppers (33%).

83% of UK shoppers admit they need some form of help during their online purchase journey.

55% will try only once or give up immediately when seeking help before an online purchase and 73% expect to be able to access help within 5 minutes (32% expecting help immediately). UK shoppers are more likely than those in any other country to shop elsewhere or abandon a purchase altogether if they don’t get help in their expected timeframe (58%, compared to 48% globally).

**Moving forwards**

Speed and simplicity rule for UK shoppers when it comes to a great online experience. 84% prioritise getting their issue resolved quickly and 58% want to see their issue resolved within a single interaction. 50% also want to deal with a friendly customer service representative, ahead of the global average of 45%.

60% of UK shoppers would like more choice in how they contact online brands. 66% demand email, 65% demand call centres and 60% would like to see Live Chat made available.

93% of UK shoppers see real-time help as useful when shopping online.
France

**Shopper dependence profile**

15% of French shoppers can be described as experienced, highly sophisticated online shoppers who serve as knowledgeable advisors to others, with a further 57% being semi-dependent shoppers (fairly experienced but sometimes needing help and support from others).

**Channel blur**

In France, 31% of online shoppers now spend more or the same online as they do in stores, slightly lower than the global average of 39%.

Online impulse shopping on a fairly regular basis is seen amongst almost half (48%) of French online shoppers.

French shoppers are in line with global averages when it comes to satisfaction with the customer service they receive in store (78%) and online generally (66%). 31% are likely to seek out help in stores whilst 16% do so when shopping online, again in line with the global averages.

French shoppers are likely to research online before shopping in store (73% compared to 78% at a global level) whilst 17% research on their mobile whilst in store, the lowest of all the countries in the survey.

**Abandonment abounds**

In France, the key reasons for shopping cart abandonment are unexpected delivery costs (76%, higher than the global average of 70%), lack of information about product / service or delivery (60%), navigation difficulties (50%) and wanting to ask a question and not being able to find the answer (35%). Difficulty in getting any help on a website is a reason for abandonment for 31% of French shoppers.

84% of French shoppers admit they need some form of help during their online purchase journey.

49% will try only once or give up immediately when seeking help before an online purchase and 73% expect to be able to access help within 5 minutes, whilst 30% expect to get help immediately. 53% of French shoppers will shop elsewhere or abandon a purchase altogether if they don’t get help in their expected timeframe (compared to 48% globally).

**Moving forwards**

Speed and simplicity rule for French shoppers when it comes to a great online experience. 81% prioritise getting their issue resolved quickly and 47% want to see their issue resolved within a single interaction.

63% of French shoppers would like more choice in how they contact online brands. 60% demand email, 57% demand call centres whilst 34% would like to see Live Chat made available.

92% of French shoppers see real-time help as useful when shopping online.
Germany

Shopper dependence profile

13% of German shoppers can be described as experienced, highly sophisticated online shoppers who serve as knowledgeable advisors to others (lower than all the other countries in the survey), with a further 71% being semi-dependent shoppers (fairly experienced but sometimes needing help and support from others). There are less dependent shoppers, requiring a lot of support, in Germany than in other markets (13% compared to a 28% global average), suggesting online sophistication is higher in Germany than elsewhere.

Channel blur

In Germany, 53% of online shoppers now spend more or the same online as they do in stores, the highest of all the countries in the survey.

Online impulse shopping on a fairly regular basis is seen amongst almost half (45%) of German online shoppers.

German shoppers are in line with the global average when it comes to satisfaction with in-store customer service (74%) and online customer service (67%). 30% of German shoppers actively seek out help in store, whilst only 17% do this when shopping online.

German shoppers are highly likely to research online before shopping in store (84% compared to 78% at a global level) whilst 21% research on their mobile whilst in store, in line with the global average of 24%.

Abandonment abounds

In Germany, the key reasons for shopping cart abandonment are unexpected delivery costs (77%, higher than the global average of 70%), lack of information about product / service or delivery (75%, compared to 56% globally), navigation difficulties (53%) and wanting to ask a question and not being able to find the answer (30%). Difficulty in getting any help on a website is a reason for abandonment for 30% of German shoppers.

76% of German shoppers admit they need some form of help during their online purchase journey, lower than the global average of 83%.

57% will try only once or give up immediately when seeking help before an online purchase and 48% expect to be able to access help within 5 minutes, lower than the global average of 71% - 20% expect to get help immediately. 46% of German shoppers will shop elsewhere or abandon a purchase altogether if they don’t get help in their expected timeframe, in line with the global average of 48%.

Moving forwards

Speed and simplicity rule for German shoppers when it comes to a great online experience. 90% prioritise getting their issue resolved quickly (higher than the global average of 82%) and 41% want to see their issue resolved within a single interaction. 48% also want to deal with a friendly customer service representative.

53% of German shoppers would like more choice in how they contact online brands. 72% demand email, 54% demand call centres and 38% would like to see Live Chat.

88% of German shoppers see real-time help as useful when shopping online.
Italy

**Shopper dependence profile**

18% of Italian shoppers can be described as experienced, highly sophisticated online shoppers who serve as knowledgeable advisors to others, with a further 36% being semi-dependent shoppers (fairly experienced but sometimes needing help and support from others). Italy has the highest level of dependent shoppers, with little online expertise and requiring a lot of support from others at 46%, compared to the global average of 28%.

**Channel blur**

In Italy, 27% of online shoppers now spend more or the same online as they do in stores, lower than the global average of 39%.

Online impulse shopping on a fairly regular basis is seen amongst more than half (59%) of Italian online shoppers, and higher than in all other countries in the survey.

Italian shoppers are in line with global averages when it comes to satisfaction with the customer service they receive in store (77%) and online generally (65%). Italian shoppers are more likely to seek out help in store than other markets (45%) and seek out help online to almost the same extent (43%), far higher than other markets (19%).

Italian shoppers are highly likely to research online before shopping in store (84% compared to 78% at a global level) whilst 21% research on their mobile whilst in store, in line with the global average of 24%.

**Abandonment abounds**

In Italy, shoppers cite fewer reasons for shopping cart abandonment than in other markets. The key reasons for shopping cart abandonment are unexpected delivery costs (40%), lack of information about product/service or delivery (27%) and wanting to ask a question and not being able to find the answer (25%). Difficulty in getting any help on a website is a reason for abandonment for 1 in 4 Italian shoppers (24%).

88% of Italian shoppers admit they need some form of help during their online purchase journey, the highest of all countries in the survey.

36% will try only once or give up immediately when seeking help before an online purchase, lower than all other countries although 73% expect to be able to access help within 5 minutes and 35% expect to get help immediately. 39% of Italian shoppers will shop elsewhere or abandon a purchase altogether if they don’t get help in their expected timeframe (compared to 48% globally).

**Moving forwards**

Speed and simplicity rule for Italian shoppers when it comes to a great online experience. 74% prioritise getting their issue resolved quickly and 43% want to see their issue resolved within a single interaction.

69% of Italian shoppers would like more choice in how they contact online brands, the highest of all countries. 56% demand email, 56% demand call centres and 46% expect to see Live Chat made available.

98% of Italian shoppers see real-time help as useful when shopping online.
Australia

**Shopper dependence profile**

10% of Australian shoppers can be described as experienced, highly sophisticated online shoppers who serve as knowledgeable advisors to others (lower than all the other countries in the survey), with a further 52% being semi-dependent shoppers (fairly experienced but sometimes needing help and support from others).

**Channel blur**

In Australia, 32% of online shoppers now spend more or the same online as they do in stores, slightly lower than the global average of 39%.

Online impulse shopping on a fairly regular basis is seen amongst almost half (49%) of Australian online shoppers.

Australian shoppers are less likely to be satisfied with the customer service they receive in store than other markets (73%) and they are also likely to be less satisfied with the customer service they typically receive when shopping online (64%). 41% of Australian shoppers actively seek out help in store, whilst 21% do this when shopping online.

Australian shoppers are likely to research online before shopping in store (74% compared to 78% at a global level) whilst 23% research on their mobile whilst in store, in line with the global average of 24%.

**Abandonment abounds**

In Australia, the key reasons for shopping cart abandonment are unexpected delivery costs (69%), lack of information about product / service or delivery (59%), navigation difficulties (52%) and wanting to ask a question and not being able to find the answer (44%). Difficulty in getting any help on a website is a reason for abandonment for 36% of Australian shoppers, the highest of all countries in the survey.

87% of Australian shoppers admit they need some form of help during their online purchase journey.

54% will try only once or give up immediately when seeking help before an online purchase and 62% expect to be able to access help within 5 minutes, lower than the global average of 71%.

25% expect to get help immediately. 53% of Australian shoppers will shop elsewhere or abandon a purchase altogether if they don’t get help in their expected timeframe (compared to 48% globally).

**Moving forwards**

Speed and simplicity rule for Australian shoppers when it comes to a great online experience. 79% prioritise getting their issue resolved quickly and 55% want to see their issue resolved within a single interaction. 48% also want to deal with a friendly customer service representative.

58% of Australian shoppers would like more choice in how they contact online brands. 64% demand email, 61% demand call centres and an equivalent 60% expect to see Live Chat made available.

93% of Australian shoppers see real-time help as useful when shopping online.
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