A UPS CONSULTATION PAPER | SEPTEMBER 2013

EUROPE STUDY

UPS PULSE OF THE ONLINE SHOPPER™

A study of the online customer experience

Conducted by

comScore

WE ♥ LOGISTICS™

Contents

Welcome to the *UPS Pulse of the Online Shopper* Study

A user-friendly and differentiated online shopping experience is essential for retailers seeking to capture their share of the thriving e-commerce marketplace. As online retail growth continues to significantly outpace that of the overall retail market, retailers are raising the bar on customer service while consumers are becoming ever more demanding. To help retailers compete, UPS has commissioned research with comScore on what elements of the online shopping customer experience drive brand preference, customer loyalty, and recommendations. The *UPS Pulse of the Online Shopper* study goes beyond topics covered by other studies, which tend to focus on purchase or web usability, and provides insights from pre-purchase to check-out to post-purchase.

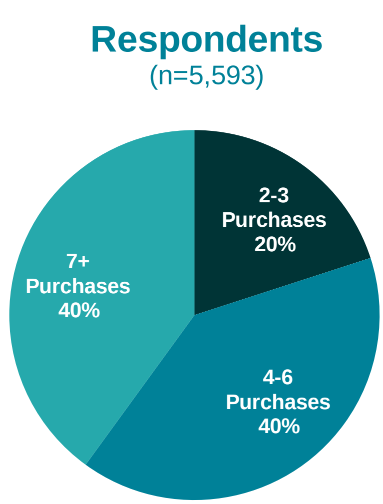
In addition to covering the entire online shopping experience, the study also delves deeper into how mobile and social media are shaping the online shopping experience. It explores what today's demanding consumers expect from retailers seeking to provide an integrated omnichannel shopping experience.

This Europe study is part of the *UPS Pulse of the Online Shopper* series commissioned worldwide to compare online shopping behaviour in key global markets. The countries or regions included in the study series include the U.S., Canada, Europe, Mexico and Asia. The U.S. study was published in June 2013, while the rest were published in September 2013.

Topics addressed in the 2013 study include the following:

- ✓ What do consumers want in an online shopping experience?
- ✓ What do consumers want from retailers in the online checkout and delivery experience?
- ✓ How important are returns in the overall online shopping experience?
- ✓ How is omnichannel retailing changing consumer purchasing and returns expectations?
- ✓ What drives repeat customers and retailer recommendations?
- ✓ How are mobile and social media channels changing consumers' shopping habits and expectations?

Figure 1



*Q1. Approximately how many online shopping purchases have you made during…[*typical 3 months*]? If unsure, please give your best estimate.*

Definitions

For the purposes of, this study, "Europe" comprises and refers to the six countries included in the study (Belgium, France, Germany, Italy, the Netherlands and the United Kingdom); "EU" comprises and refers to all the countries of the European Union.

Methodology

The study analyses data from a survey of more than 5,500 online shoppers in 6 European countries (Belgium, France, Germany, Italy, the Netherlands and the UK) conducted in February and April-June, 2013. All shoppers surveyed had to meet the criteria of making at least two online purchases in a typical 3-month period. In each country, 20% indicated they made 2-3 online purchases, 40% made 4-6 purchases, and 40% made 7 or more purchases (Figure 1). Although this is not necessarily a natural breakout, it helps ensure a representative sample of frequent shoppers in the population.

Close to half of survey respondents live in urban areas, while just over a quarter live in suburban and rural areas, respectively (Figure 2). Nearly 70% of respondents are employed, with the remaining 30% split between those who are unemployed, retired, or students. 46% of respondents live by themselves or with one other person, while 30% live in households with four or more people.

This study will provide new insights into today's omnichannel shopper and how to keep pace with consumers' constantly evolving expectations.

Figure 2

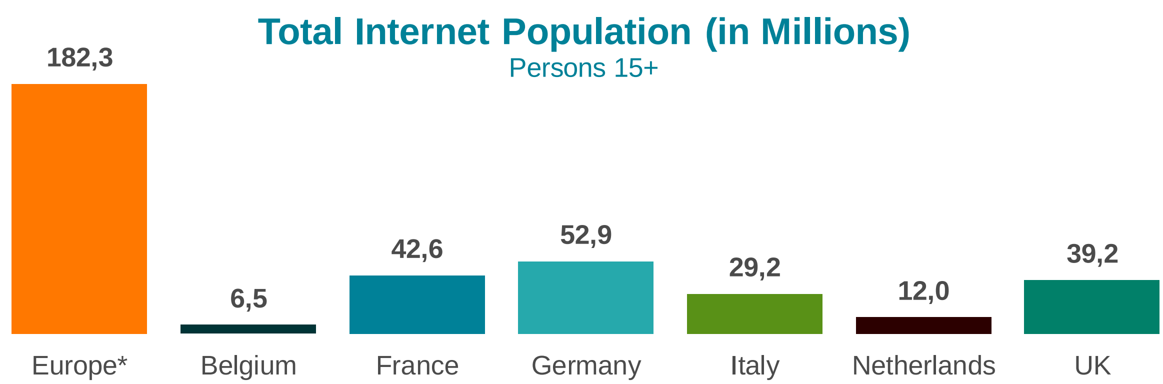
Respondents (n=5,593)		
Location Type	Urban *(in a city)*	45%
	Suburban	27%
	Rural	27%
	Don't Know	1%
Employment Status	Employed *(Full, Part & Self)*	68%
	Unemployed	10%
	Retired	9%
	Student	9%
	Other	5%
Household Size	1	16%
	2	30%
	3	23%
	4	21%
	5 or More	9%
	Prefer Not to Answer	1%

D7. Would you classify the area you live to be predominantly…? | 9a. Which of the following best describes your employment status? | HHSIZE. How many people live in your home?

Internet Population Overview

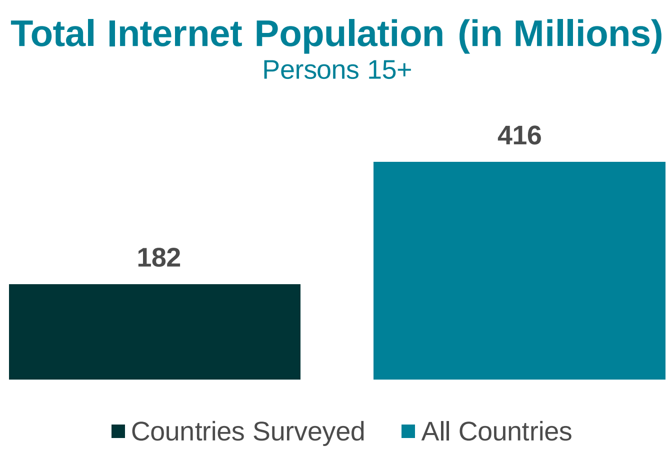
Europe, as defined in this study, has an internet population of just over 182 million users. France, Germany, and the UK make up nearly three quarters of this total, with close to 135 million internet users between them (Figure 3).

Figure 3



Source: comScore Media Metrix, May 2013. Includes persons age 15+ and includes home and work PCs only.
**Europe includes Belgium, France, Germany, Italy, the Netherlands, and the UK.*

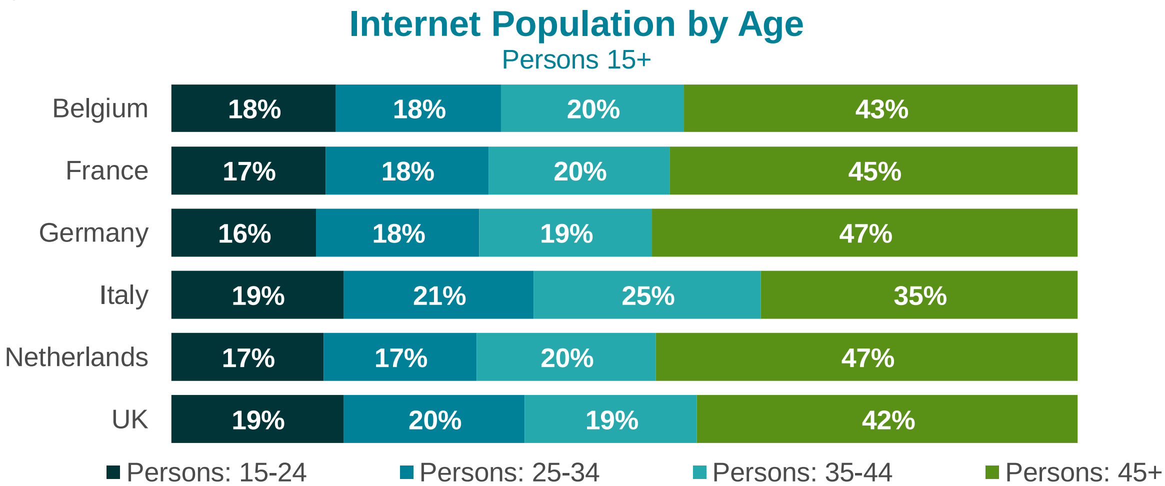
Figure 4



Source: comScore Media Metrix, May 2013

Europe's total internet population is over 400 million (Figure 4). Italy has the youngest internet population, with 65% younger than 45 (Figure 5).

Figure 5



Source: comScore Media Metrix, May 2013

Key Findings

This study contains detailed insights for retailers on improving the customer experience from pre-purchase through to delivery and returns. Some high-level takeaways include the following:

- **Shoppers in Europe Want to See Improvements in Areas of Delivery, Customer Service, and Additional Channels for Purchase**
  Overall online shopping satisfaction is high in Europe, but there is the most room for improvement in the post-purchase experience – a key area for driving repeat customers and brand loyalty. Top areas for improvement include: the ability to contact a live customer service rep (especially in Belgium and Germany), and the flexibility to choose a delivery date (especially in Italy, Belgium and France). The ability to purchase through a mobile smartphone application (especially in Belgium and France) is another area for improvement. Satisfaction is high around aspects such as the availability of websites in the preferred language, the variety of brands and products offered and the ease of check-out.

- **Retailers Should Communicate Clear Expectations on Package Delivery Timing**
  Communicating early in the process regarding package delivery and executing on delivery promises leads to advocacy for the retailer. When retailers communicate the expected delivery date, customers in Europe are generally patient, but this may depend on the origin of the package – for domestic orders they are willing to wait 2-3 days, for those within Europe, 4-5 days, and for those outside of Europe, more than 8 days. There is a definite association between the distance the package is traveling and the amount of time in transit expected. Across countries, timely arrival of shipments and free shipping drive online retailer recommendations. Package tracking services are considered either "essential" or "nice to have" by almost all consumers.

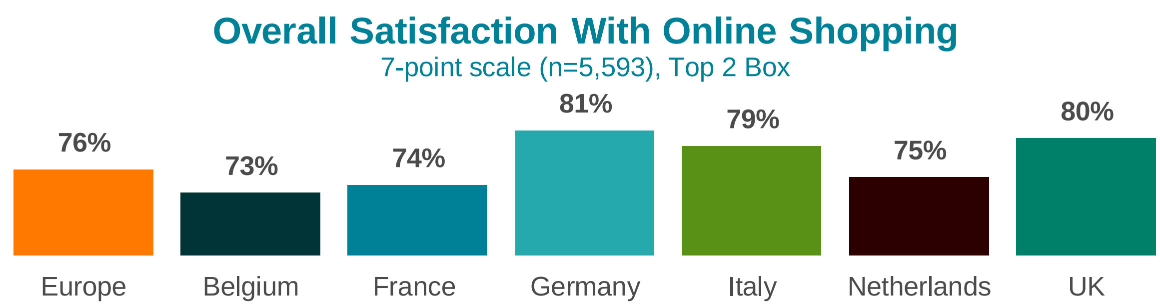
- **Improved Returns Process Offers Opportunity for Retailer Differentiation**
  Returns are an area for online shoppers in Europe worthy of attention from retailers. In most countries, more than half of online shoppers have returned an online purchase (led by Germany at 77%). Easy returns and exchanges lead to repeat purchases and are a top driver of positive recommendations, and two-thirds of consumers review a return policy before purchasing a product, indicating major benefits for retailers who focus on this area.

- **Integrated Omnichannel Experience Drives Value for Consumers**
  Retailers must keep pace with the rapid adoption of mobile technology and tailor their offerings to an increasingly mobile consumer – while extending the shopping experience across channels. Mobile device penetration is high – in most countries measured, more than half own a smartphone and about a third own a tablet, with 62% of these consumers making purchases on their tablets. Most omnichannel shoppers prefer online methods of access to retailers, but they are also looking for a seamless omnichannel experience. Key elements of that experience include: the ability to shop online and collect in store, the option to conduct one-click checkout, and the ability to shop online and return to a store.

The State of Online Shopping Satisfaction

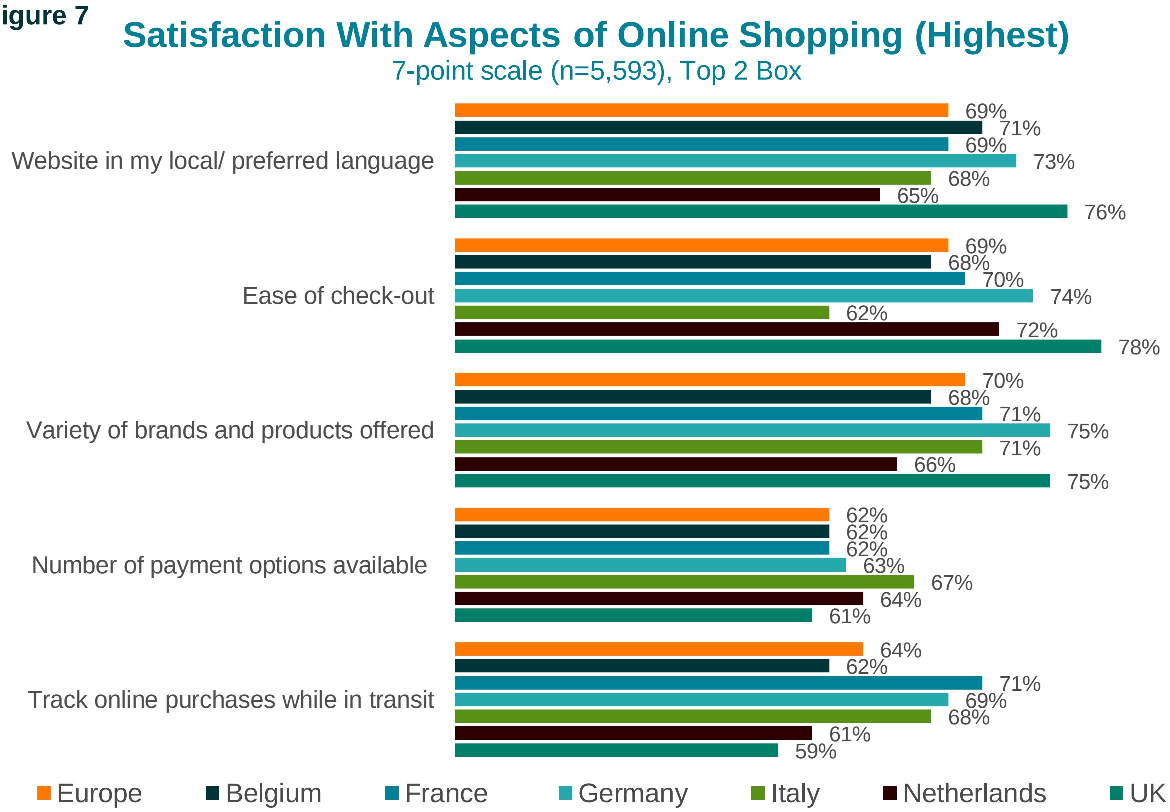
Overall consumer satisfaction with online shopping in Europe is high at 76% (those survey respondents selecting the Top 2 Boxes on a 7-point scale, Figure 6). The aspects of online shopping with which respondents are most satisfied are those related to the retailer website – in the desired language and the variety of products offered (Figure 7). Online shoppers are least satisfied with the ability to customise their experience post purchase. Specifically, their ability to choose a delivery day, re-route a package after it has been shipped, and the ability to specify a time of day for delivery. They are also not very satisfied with their ability to contact a live customer service representative and the ability to purchase through a smartphone or tablet application. The one outlier in these areas is Italy where online shoppers remain relatively satisfied with these aspects (Figure 8).

Figure 6



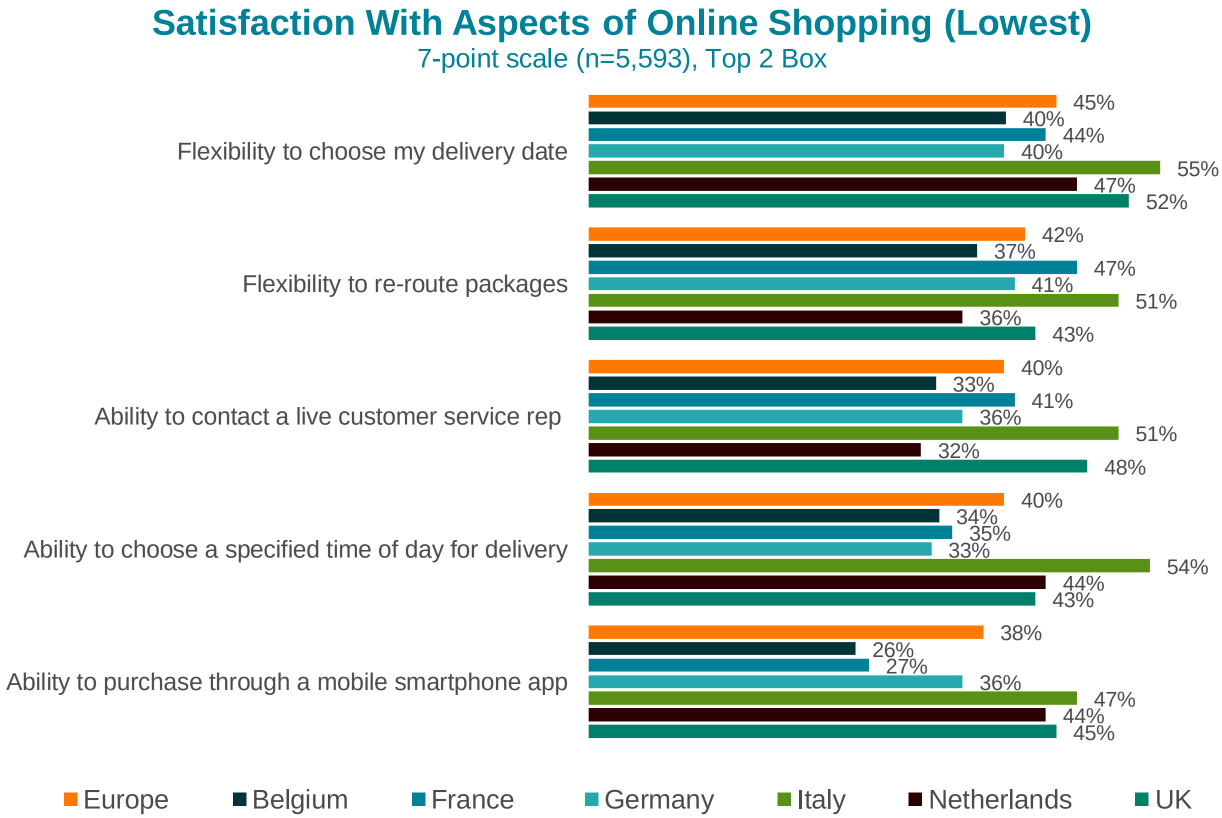
Q10. Overall, how satisfied are you with your previous online purchasing experiences in the past three months?

Figure 7



Q11. Based upon your previous experience, how satisfied are you with each of the following aspects of online purchasing?

Figure 8

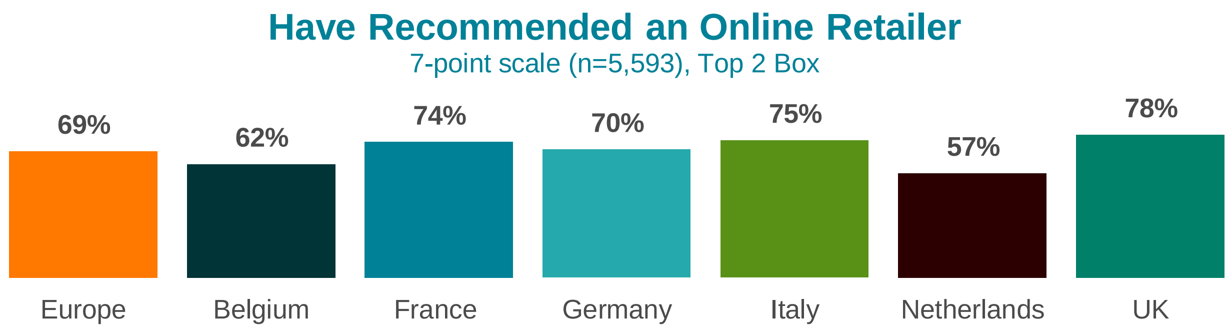


Q11. Based upon your previous experience, how satisfied are you with each of the following aspects of online purchasing?

Factors Driving Retailer Recommendations

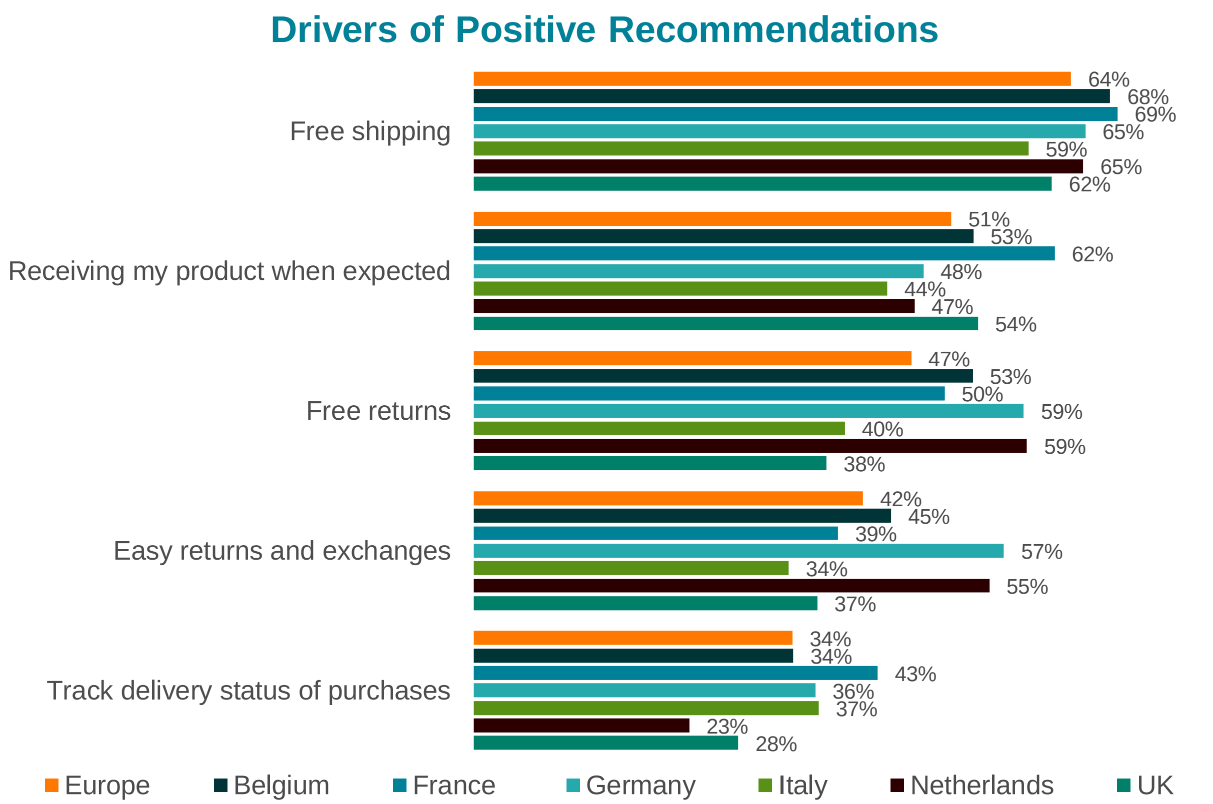
In addition to retaining satisfied customers and acquiring uncommitted potential customers, another way for retailers to increase their business is through customer advocacy and referral. When asked what has led a shopper to recommend a particular retailer, respondents in Europe cited the availability of free or discounted shipping as the top factor (selected by more than half in all countries, and by 69% in France), followed by timely arrival of shipments, and free or easy returns (Figure 10). While it is no surprise that survey respondents will typically always indicate a preference for free services, retailers should take note that consumers also value timely delivery and easy returns, and are willing to advocate on a retailer's behalf should they meet their customers' expectations in this regard.

Figure 9



Q14. How likely are you to recommend to family or friends the online retailers that you have previously made purchases from?

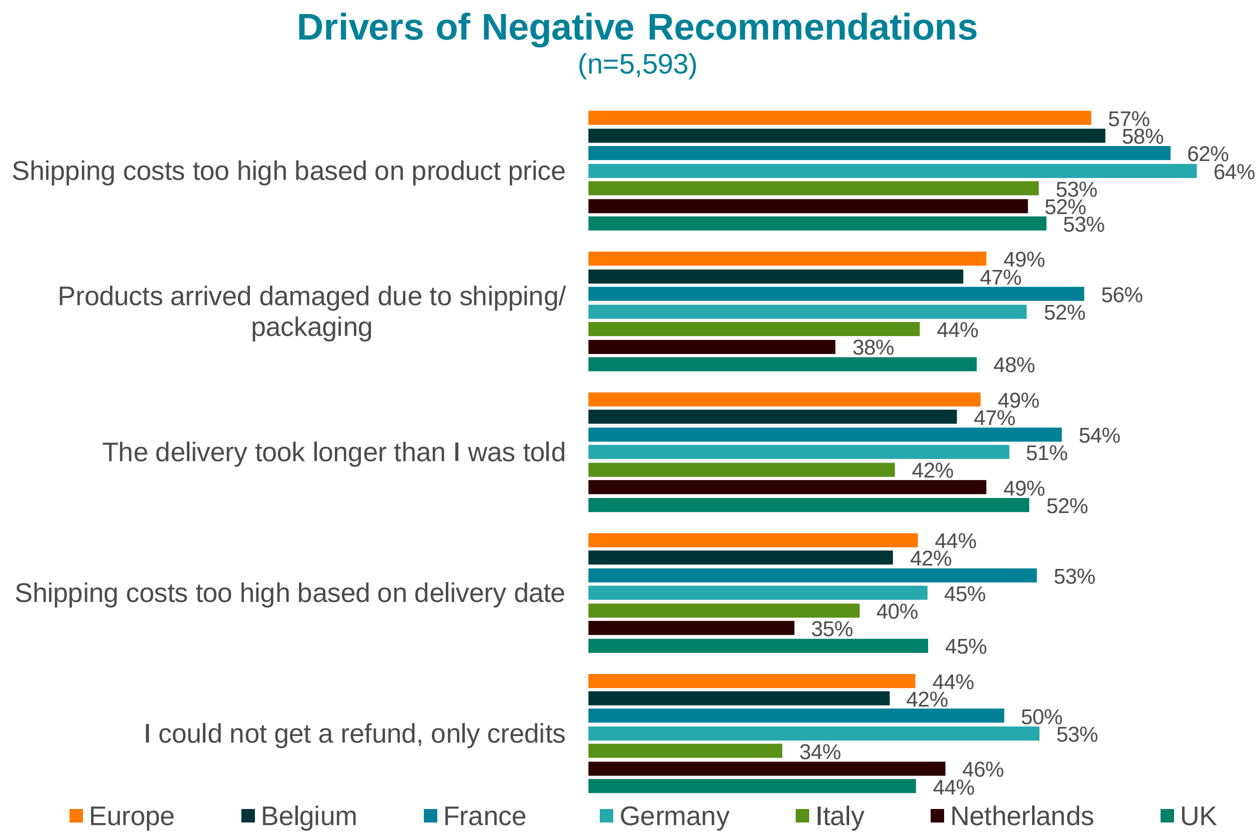
Figure 10



Q17. Assuming you are happy with the product you purchased, what service features have actually led you to recommend an online retailer? Select all that apply.

On the other hand, certain factors can drive a poor customer experience leading to negative word-of-mouth. The top factor was shipping costs being too high based on the product price (57%), selected by more than half of respondents in all countries (Figure 11). Other important factors include the delivery taking longer than communicated (especially in France), products arriving damaged (again especially in France), the inability to get a refund, and shipping costs being too high based on expected delivery date.

Figure 11



Q19. What experiences (not including price or the product itself) would most likely lead to a negative recommendation to friends/family?

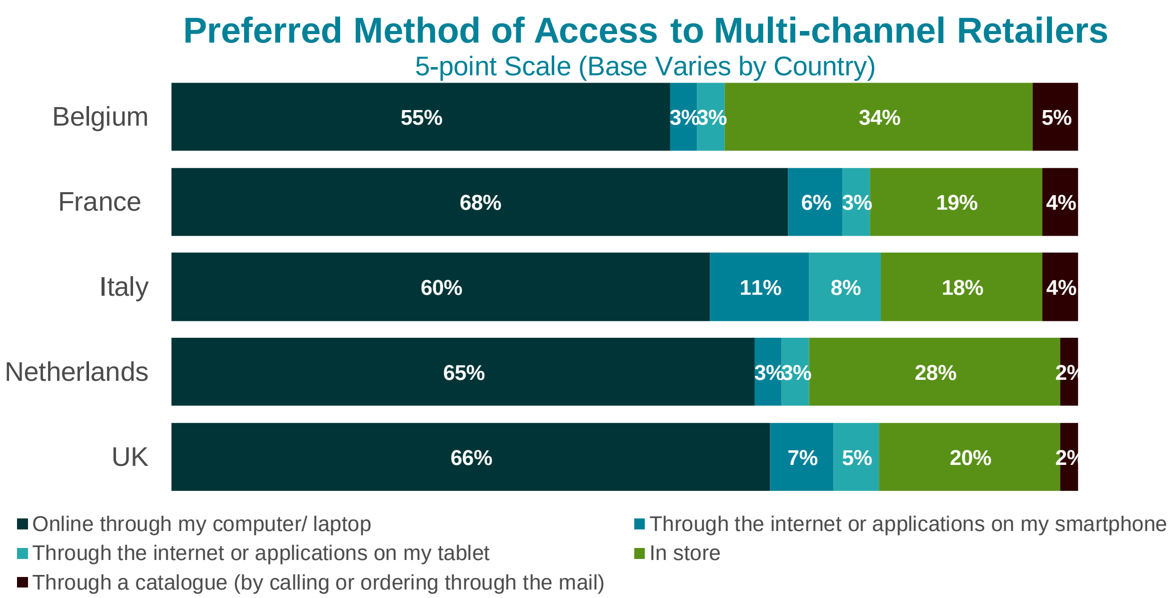
Online and Cross-Channel Engagement with Retailers

European countries have large online audiences (Europe as a whole has more than 416 million Internet users). According to the comScore Media Metrix, Germany is the leader among countries in our study, with more than 50 million Internet users. Mobile technology is prominent in Europe, with 6 in 10 shoppers owning a smartphone and nearly a third owning a tablet. Additionally, usage of social networking sites is strong in Europe, as Europeans spend an average of 6.6 hours per month on these sites. Facebook is the clear leader here – in Belgium, France, Italy, the Netherlands and the UK the site ranks third in total unique visitors while in Germany it ranks second.

Mobile Playing a Significant Role

Nearly 8 in 10 online shoppers in most countries prefer to access multi-channel retailers via digital channels (Figure 12). Consumers in Europe are particularly interested in online shopping via desktop or laptop. Whilst in-store visits continue to play an important role (especially in Belgium), the movement towards increased utilisation of online channels cannot be denied.

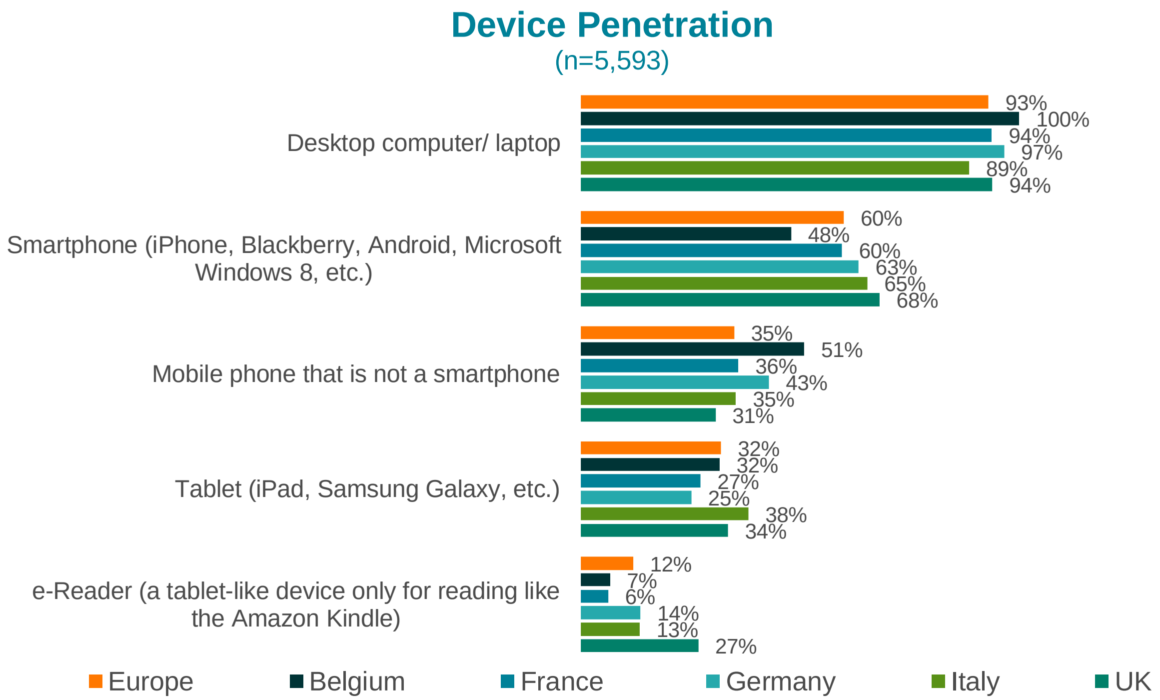
Figure 12



NEWQ_OC1. Thinking of your favourite retailer that has physical stores and an online presence (website/app), how do you prefer to access them?
Germany not included

Of European shoppers surveyed, 60% have a smartphone and 32% own a tablet (Figure 13). Smartphone and tablet penetration is particularly high in France, Germany, Italy and the UK Among those who own a tablet, 62% make purchases on the tablet in a typical three month period compared to 49% of smartphone owners. Given the relatively high buying penetration within these channels – particularly as adoption of devices continues to increase – it has never been more important for retailers to ensure they are at the forefront of mobile commerce strategies.

Figure 13

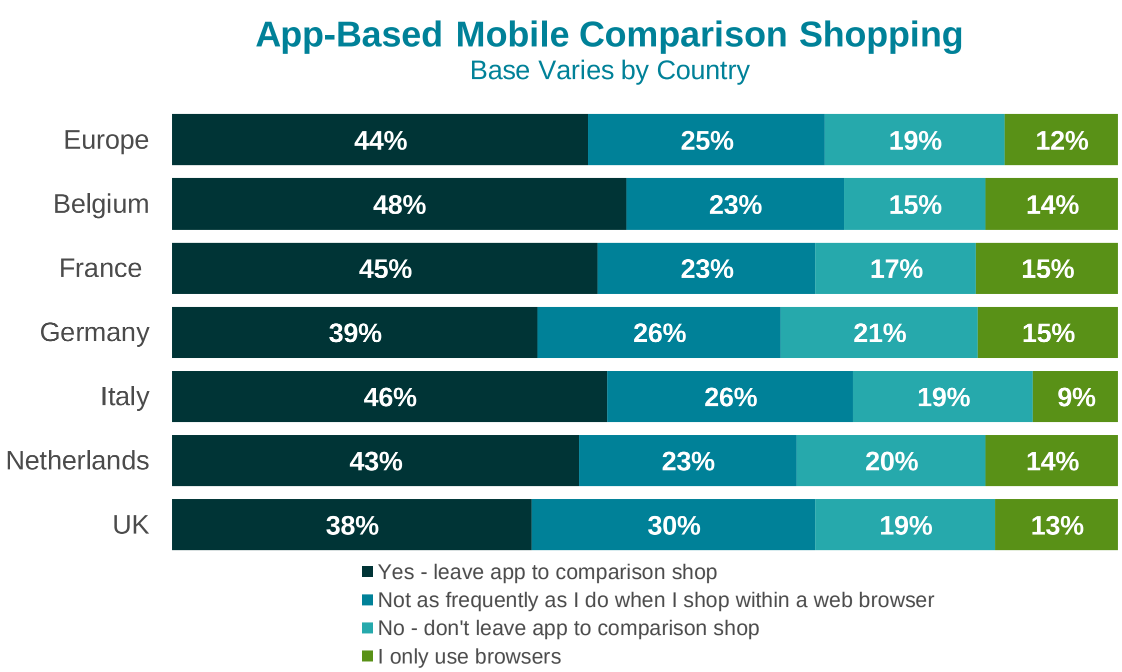


NEWQ2. Which of the following do you use? Please select all that apply.
**Netherlands not shown*

Mobile Shopping Habits

Nearly half of European consumers are less likely to comparison shop when using a using a retailer's mobile app versus a browser (Figure 14), underscoring the importance of retailers investing in a mobile app.

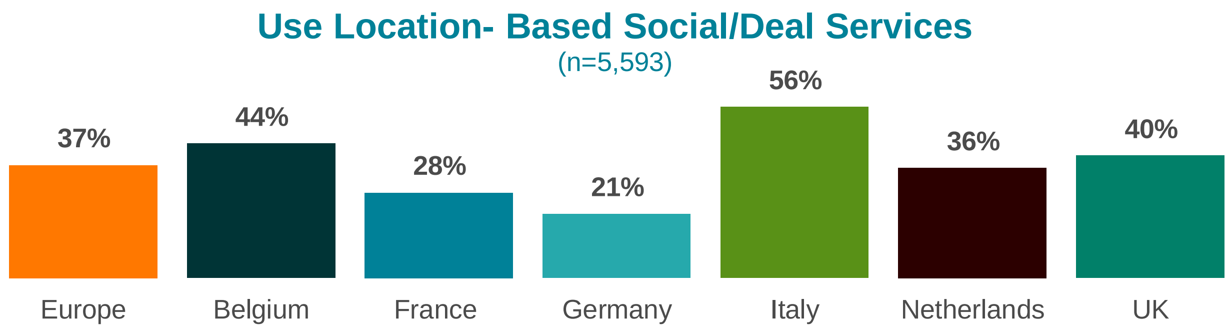
Figure 14



NEWQ_MOB1. When you shop within a retailer's mobile app, do you leave that app to comparison shop across other retailers?

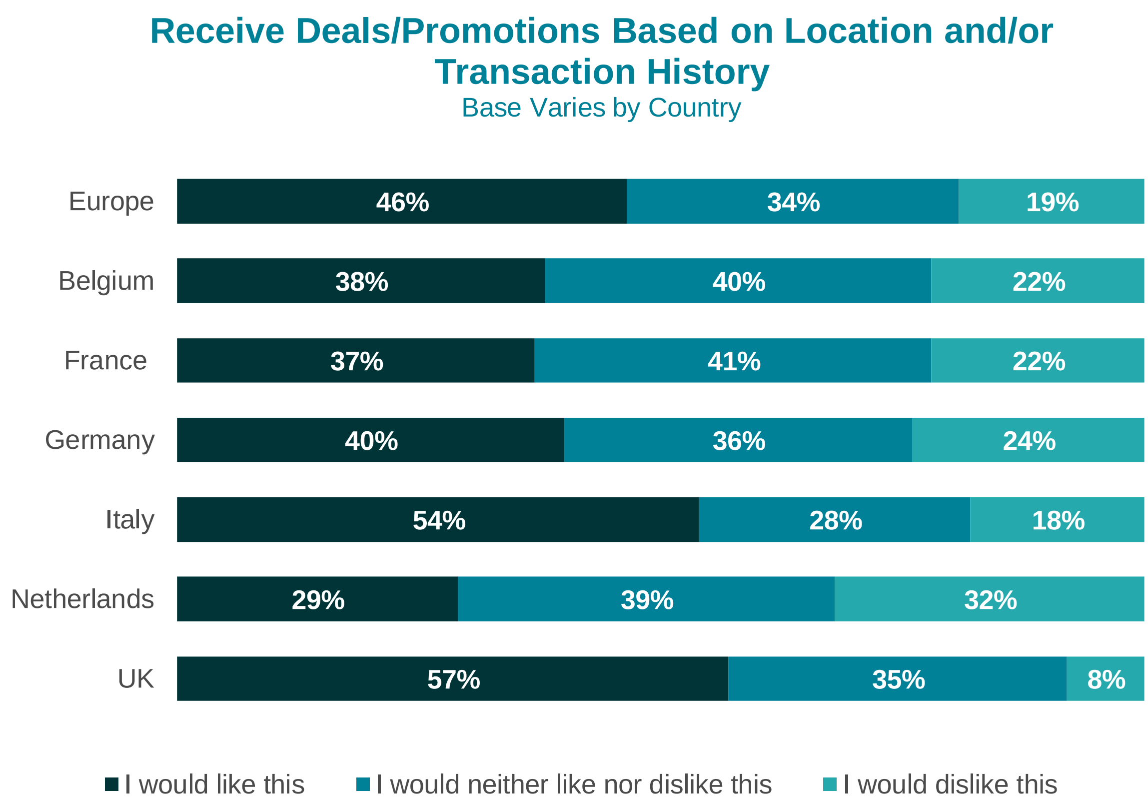
In addition, a mobile app allows retailers to provide deals and promotions according to the user's location. Of the nearly 40% of European shoppers who use location-based deals services (Figure 15), 46% would like to receive deals and promotions based on their location and/or transaction history (Figure 16). UK online shoppers are most likely to be interested in this.

Figure 15



SM6. Do you use any of the following location-based social/deal services? Please select all that apply.

Figure 16

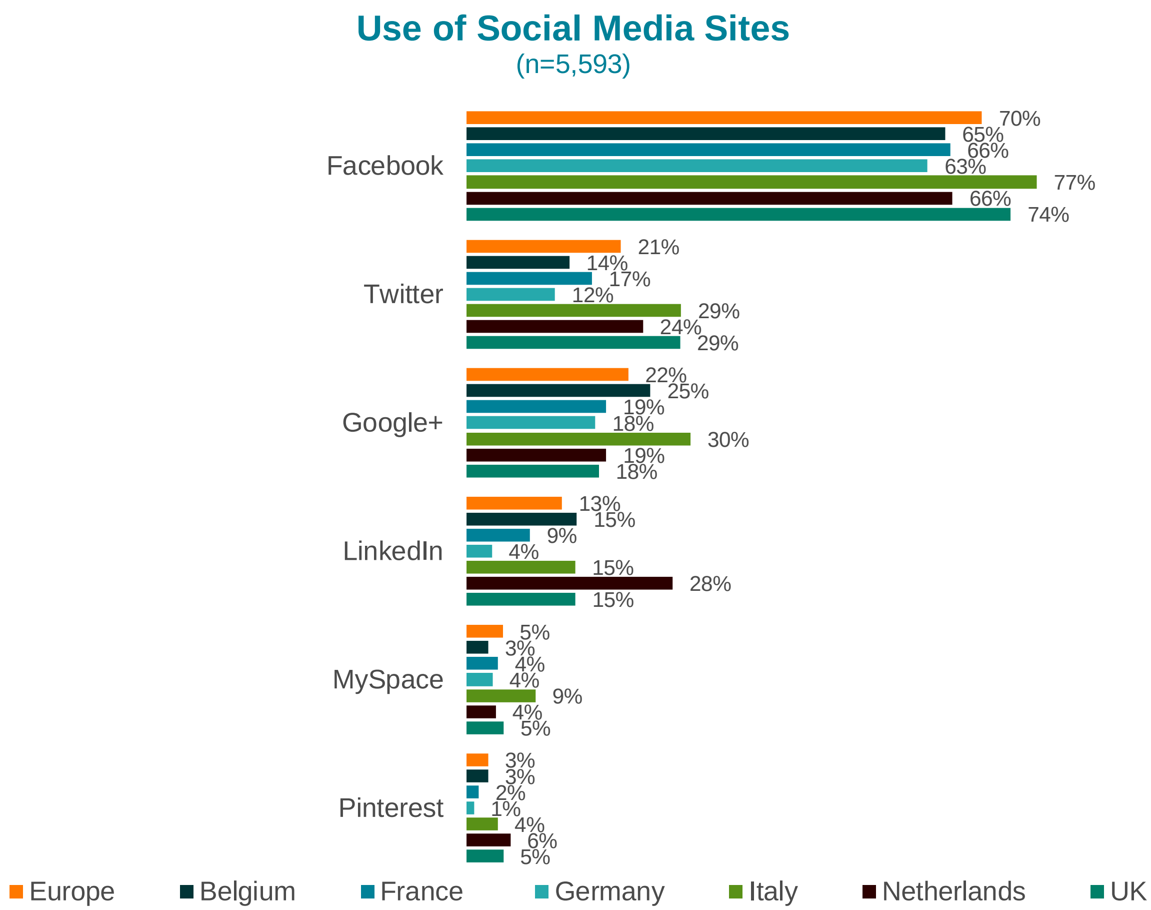


SM6. Do you use any of the following location-based social/deal services? Please select all that apply.
SM7. You indicated having used a location-based social/deal service. How would you feel if your retailer were to use your location and/or transaction history to serve you relevant deals and promotions suited to your interests?

Retailer Interaction through Social Media

The social media component of the survey revealed certain insights about how and why European consumers engage with retail brands on the various channels. Of the shoppers surveyed, 78% indicated using at least one social media site. Facebook ranks as the most popular by a considerable margin, followed by Twitter, Google+, and LinkedIn (Figure 17). Italian online shoppers are most likely to use Facebook, and along with those in the UK and the Netherlands are more likely to use Twitter and LinkedIn versus the other countries measured.

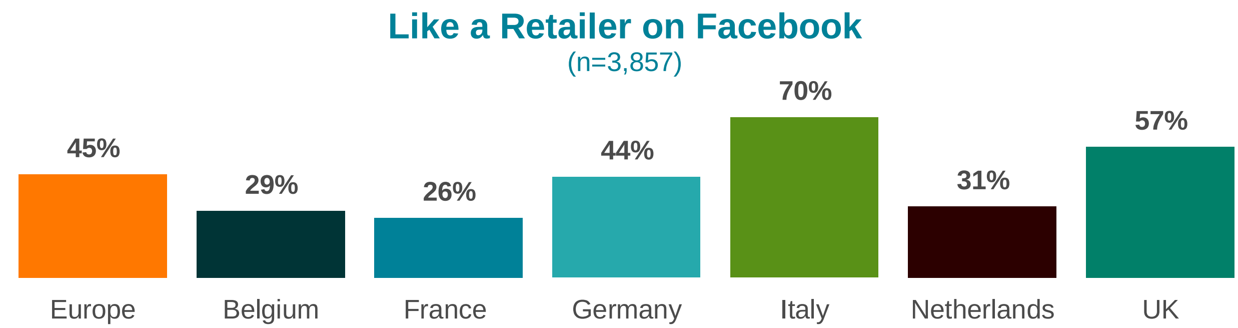
Figure 17



SM1. Do you use any of the following social networking sites? Please select all that apply.

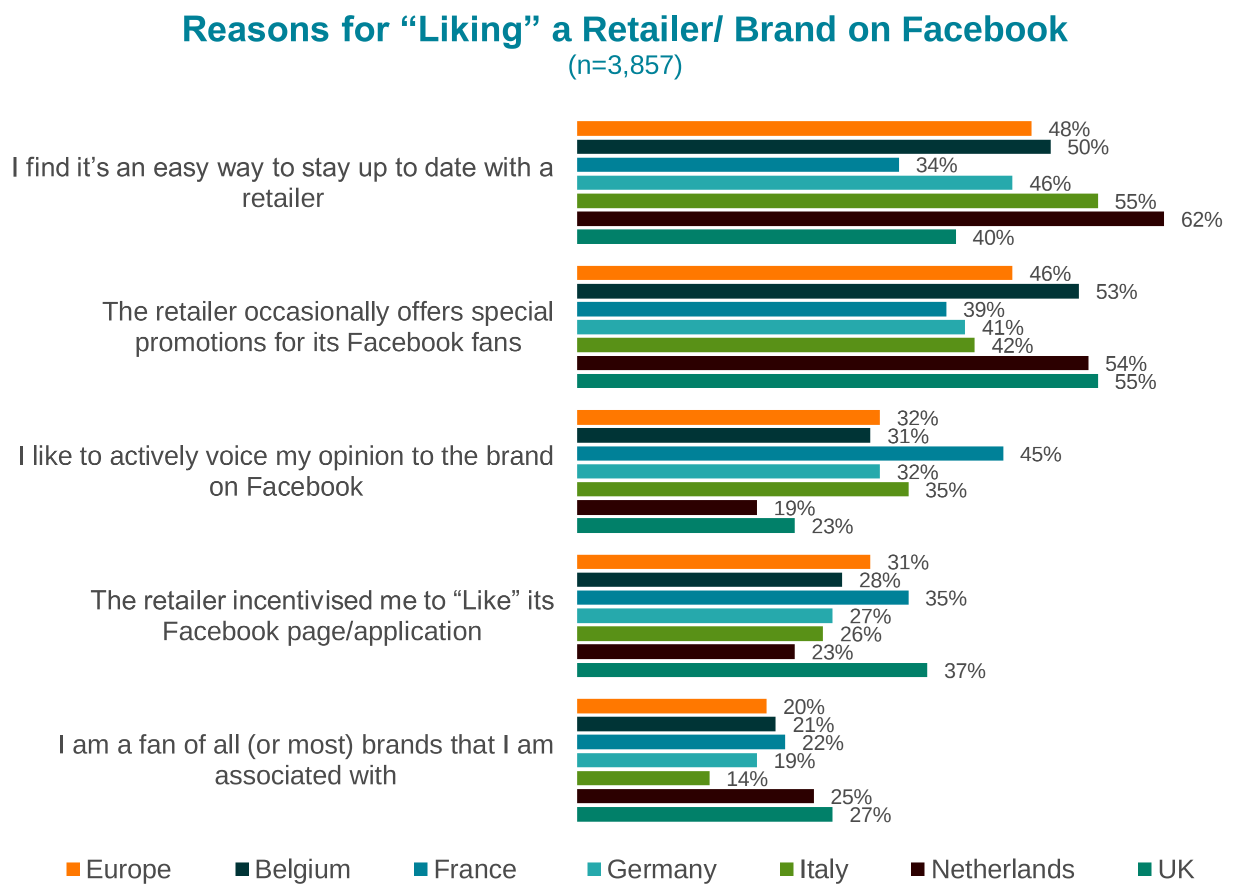
A significant number of consumers in Europe engage in Social Media, but reasons for usage and the level of engagement vary greatly by country. 45% of Facebook users in Europe said that they “like” a brand with about half of those users saying they have done so to receive a promotion or incentive from that brand (Figures 18 and 19). Online consumers in Italy and the Netherlands “like” brands on Facebook in order to stay up to date with the retailer, while those in the UK are looking for special promotions. Among those who “like” a brand on Facebook, 86% said they pay attention to retailers’ updates (Figure 20) (Italian and French online consumers are most likely to say they pay a lot of attention). Facebook continues to be an important marketing channel for retailers given its combination of audience reach and engagement with promotional content.

Figure 18



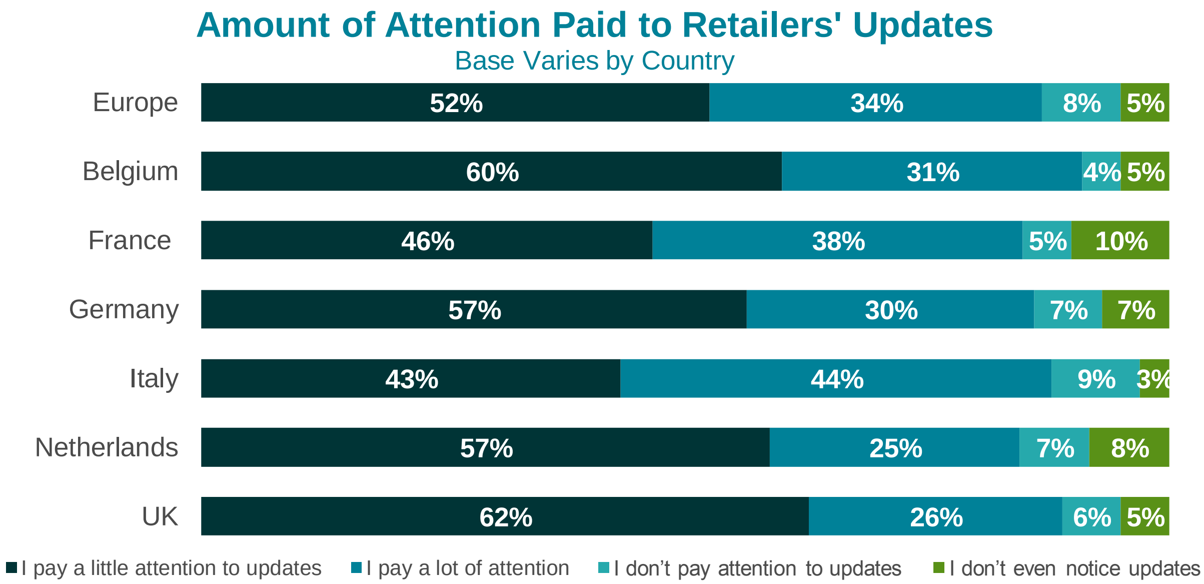
SM2. Do you "Like" any retailers on Facebook?

Figure 19



SM3. Why did you decide to "Like" a retailer/ brand on Facebook? Please select all that apply.

Figure 20



SM4. When you see updates from the retailer on your Facebook newsfeed, how much attention do you generally devote to the update?

Valued Options for Omnichannel Shoppers

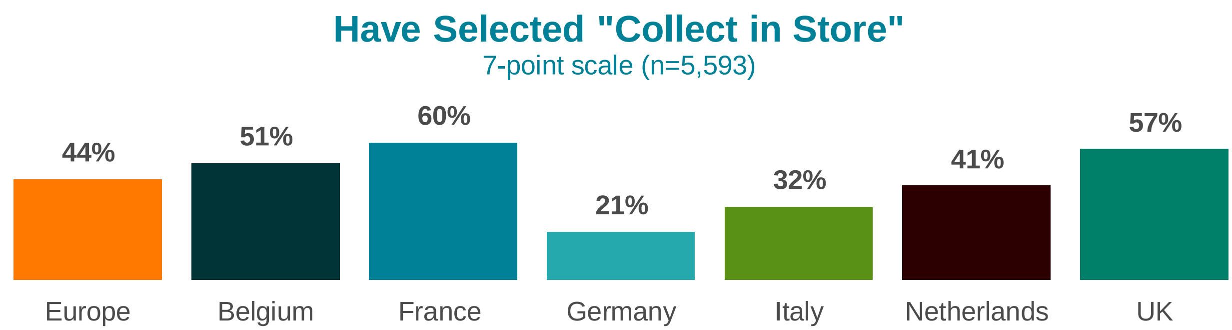
When examining aspects driving the likelihood to shop with a retailer, European shoppers demonstrated a distinct preference for retailers who deliver an integrated omnichannel experience both in terms of online/in-store working together and the availability of mobile shopping features. The single most important factor, cited by 52% of respondents, was the ability to buy online and then make returns at the store (Figure 21). Online shoppers in France and Italy in particular tended to cite these aspects as important drivers of their likelihood to shop with a given retailer.

Figure 21

NEWQ_OC3. On a scale of 1 to 7, how likely would you be to shop with a retailer if the following were made available to you?

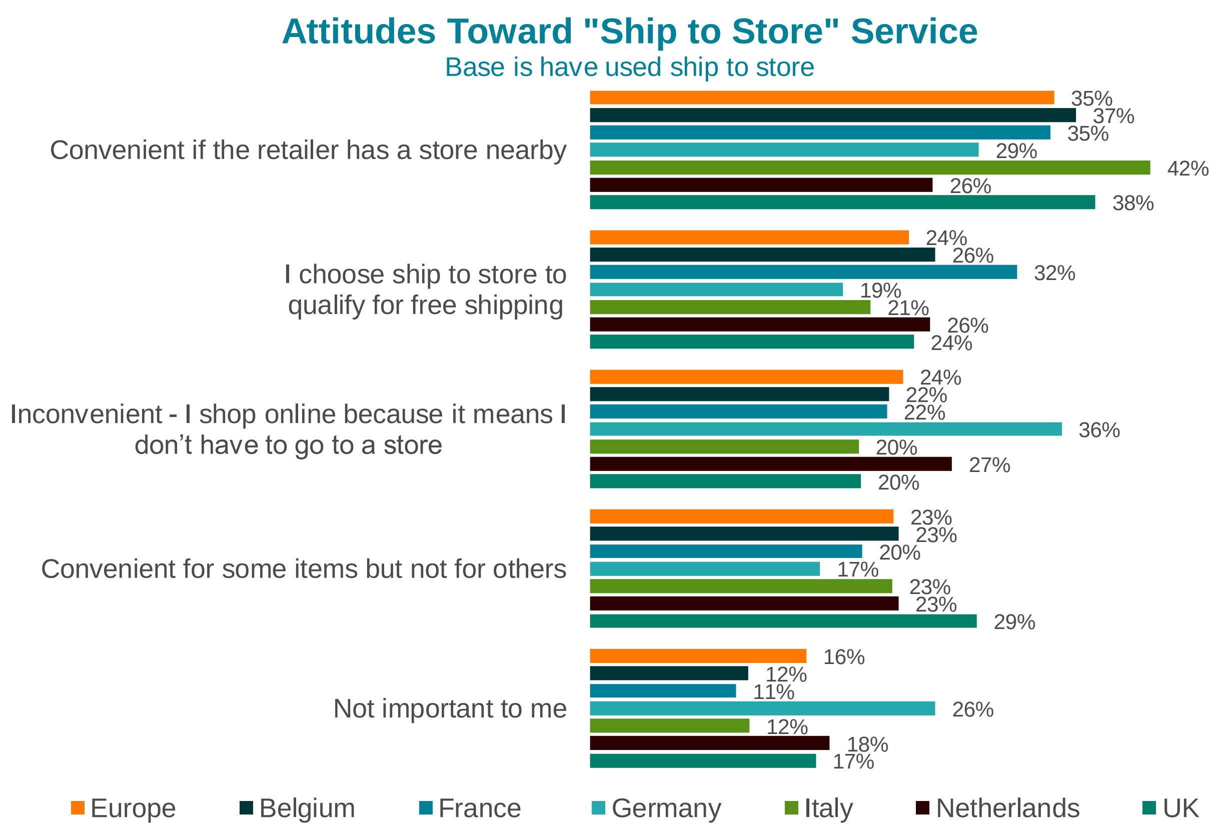
"Collect in Store" services tend to be viewed by consumers in Europe as a means to avoid shipping costs, and can lead to incremental sales gains for retailers. 44% of European online shoppers surveyed have selected "Collect in Store" (with French online shoppers most likely to do so at 60%) and about one-third (30%) of those said they have purchased other items while in the store (Figures 22 and 24).

Figure 22



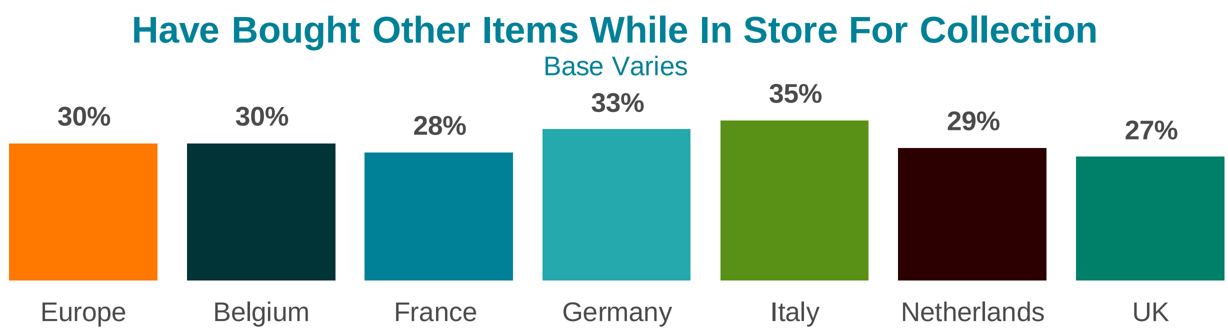
NEWQ_OC4. When purchasing online, have you ever chosen to "collect in store"?

Figure 23



Q48. Of the choices below, which do you find best match your attitude toward buying online and collecting at the retailer's store? Please select top 2 choices only

Figure 24



NEWQ_OC4B. When you selected "collect in store" in the past when purchasing online and then actually collected the item, typically did you end up purchasing more items while you were there for the collection?

Check-Out Process and Cart Abandonment

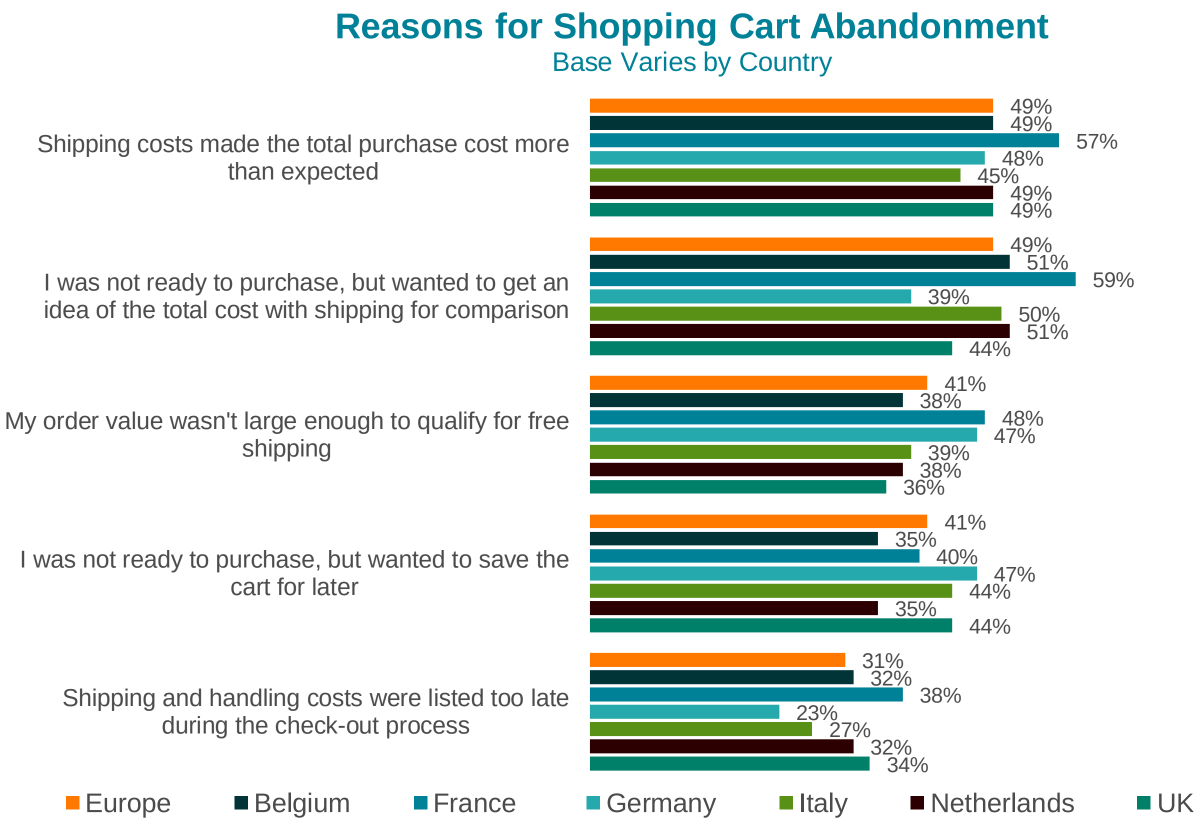
Study results also highlight the importance of the check-out process for retailers. While all retailers seek to maximise conversion, the main drivers of check-out behaviours are not always widely understood.

Factors Driving Shopping Cart Abandonment

The fact that 85% of European online shoppers (and at least 74% in each country measured) said they have placed items in the shopping cart and left the site without making a purchase (with French online shoppers most likely to do so) clearly indicates that shopping cart abandonment is a significant issue that represents lost opportunity for retailers.

Among those who have abandoned their shopping carts, shipping cost was the reason cited most often among 49% of these respondents (Figure 25). 49% also said that they abandoned the cart because they wanted to get an idea of the total cost with shipping for comparison purposes, and 41% because their order wasn't large enough to qualify for free shipping. Online shoppers in France, in particular, were more likely to abandon a cart due to these reasons.

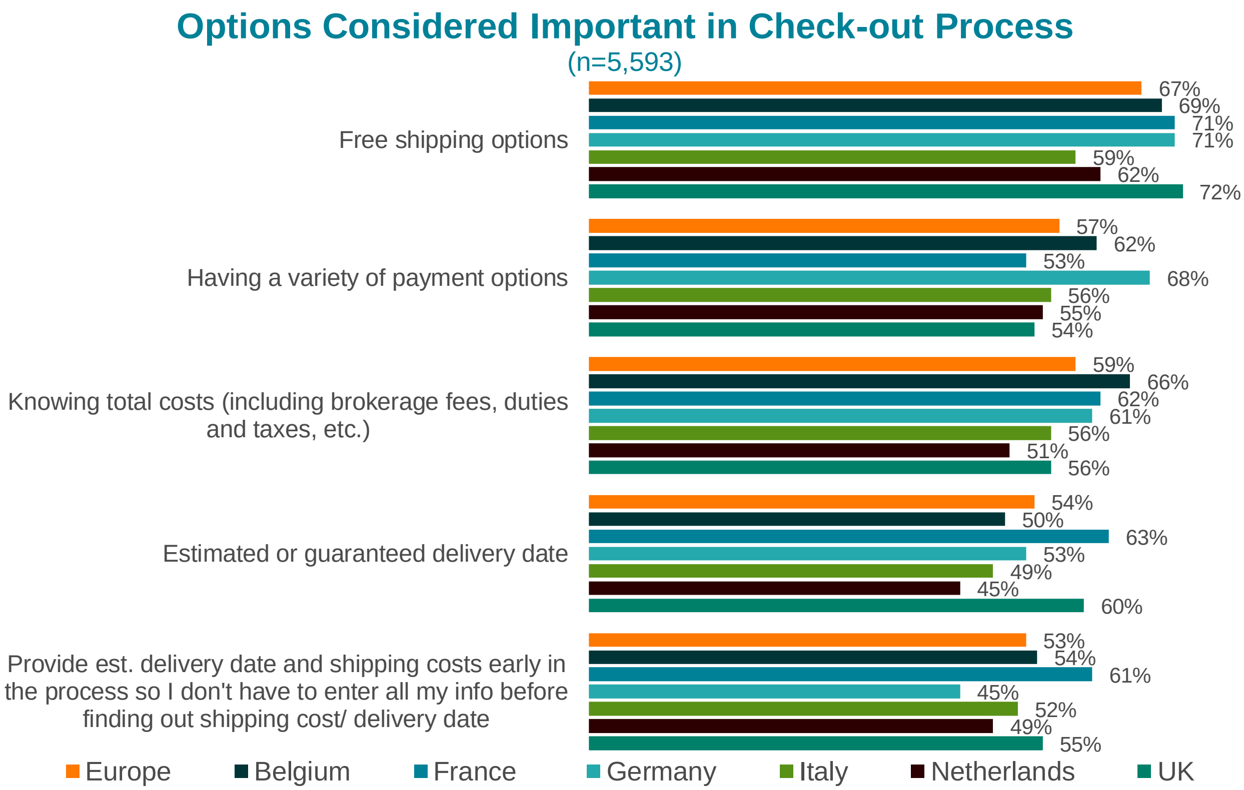
Figure 25



Q24. When shopping online, have you ever placed items in the online cart or basket but then left the site without making a purchase?
Q25. What are some of the reasons that you have abandoned a shopping cart with items you've added for purchase?

Looking at what information or options are important to online shoppers when going through an online check-out process, nearly 70% of respondents say they want to see free shipping options at check-out (Figure 26). Once again, it is not surprising that the "free" option will tend to be chosen by survey respondents, but other factors that don't involve costs to the retailer are also present – providing online consumers with their total cost, having a variety of payment options (especially for German online shoppers), and providing information on when the purchase will arrive. Consumers prefer to have their expectations set early in the process.

Figure 26

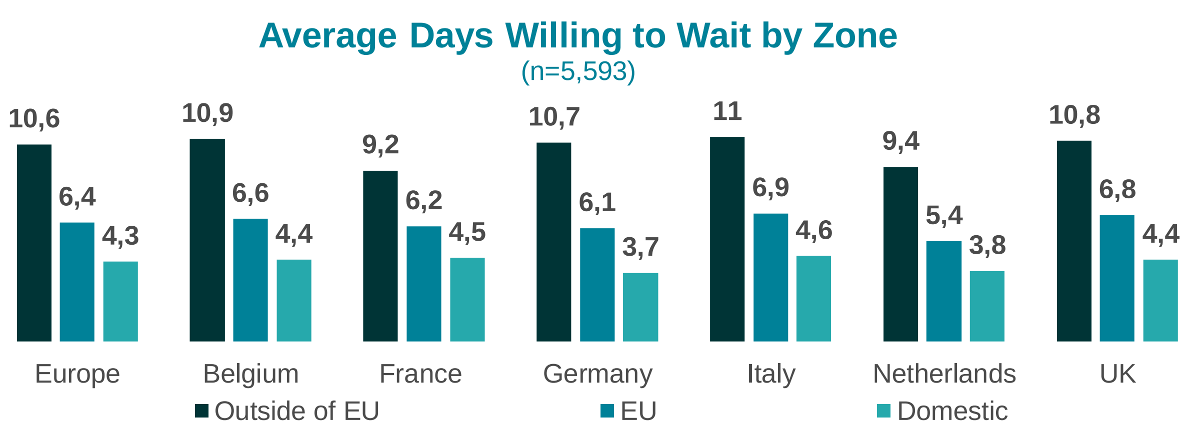


Q23. What information or options are most important to you when going through an online check-out process?

Setting Delivery Expectations

As shown above, half of European online shoppers say that an estimated or guaranteed delivery date is important at check-out (Figure 26). Consumers are also willing to wait to receive their online purchases, and they correlate the distance of the shipment to the time they expect to wait before receiving the package (Figure 27).

Figure 27



Q40. What is the number of days that you are usually willing to wait for most of your online purchases to be delivered? If unsure, please give your best estimate.

Delivery Dates Can Drive Shopping Cart Abandonment

Nearly 8 in 10 (78%) online shoppers in Europe said they have abandoned a shopping cart due to domestic delivery times and over 6 in 10 (63%) have done so due to international delivery times, both inside of and outside of Europe. If consumers have to wait more than 8 days for their purchase to be delivered, regardless of the shipment origin, they will likely abandon their shopping carts (around 50% domestic, 60% for within Europe, and 80% for shipments outside of Europe).

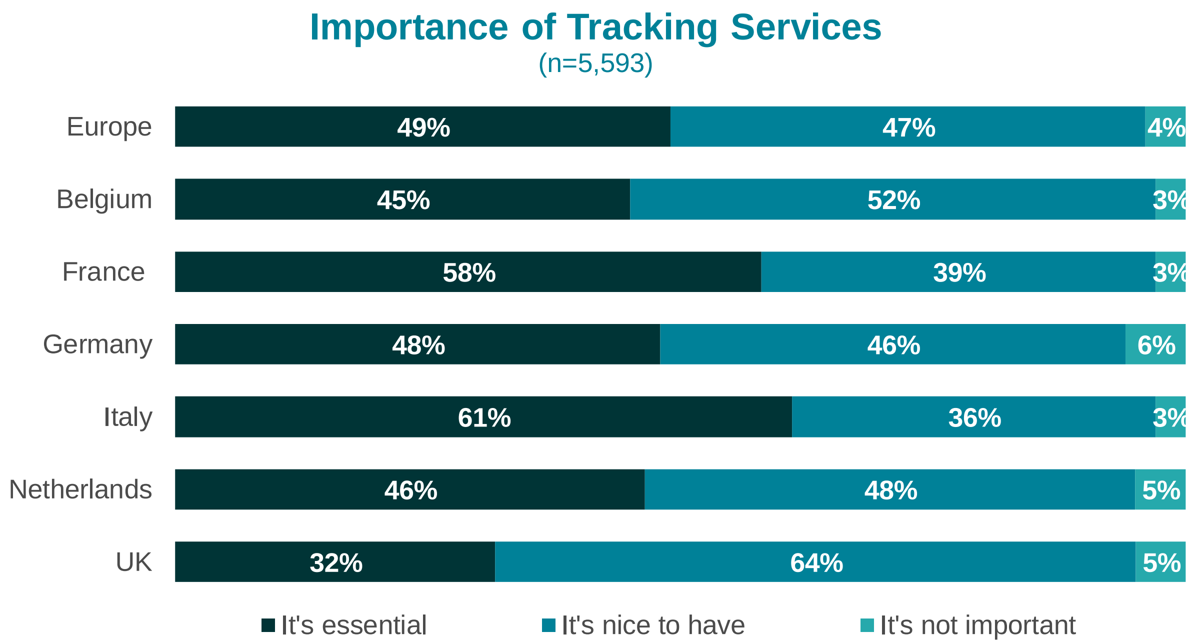
The Delivery Experience

Shipping and delivery are key value drivers in the online shopping experience, with consumers preferring different options to meet those needs. European online shoppers expect several delivery options to be available, with more than half expecting standard or express delivery. Online shoppers stated they choose standard delivery the majority of the time, signifying that, although consumers expect a variety of options, they typically choose the most economical. It's important to note that consumer expectations for delivery options decrease for packages shipped outside the EU, as less than a quarter expect express delivery to be offered and less than 1 in 10 expect a next-day delivery option.

Package Tracking is an Important Feature

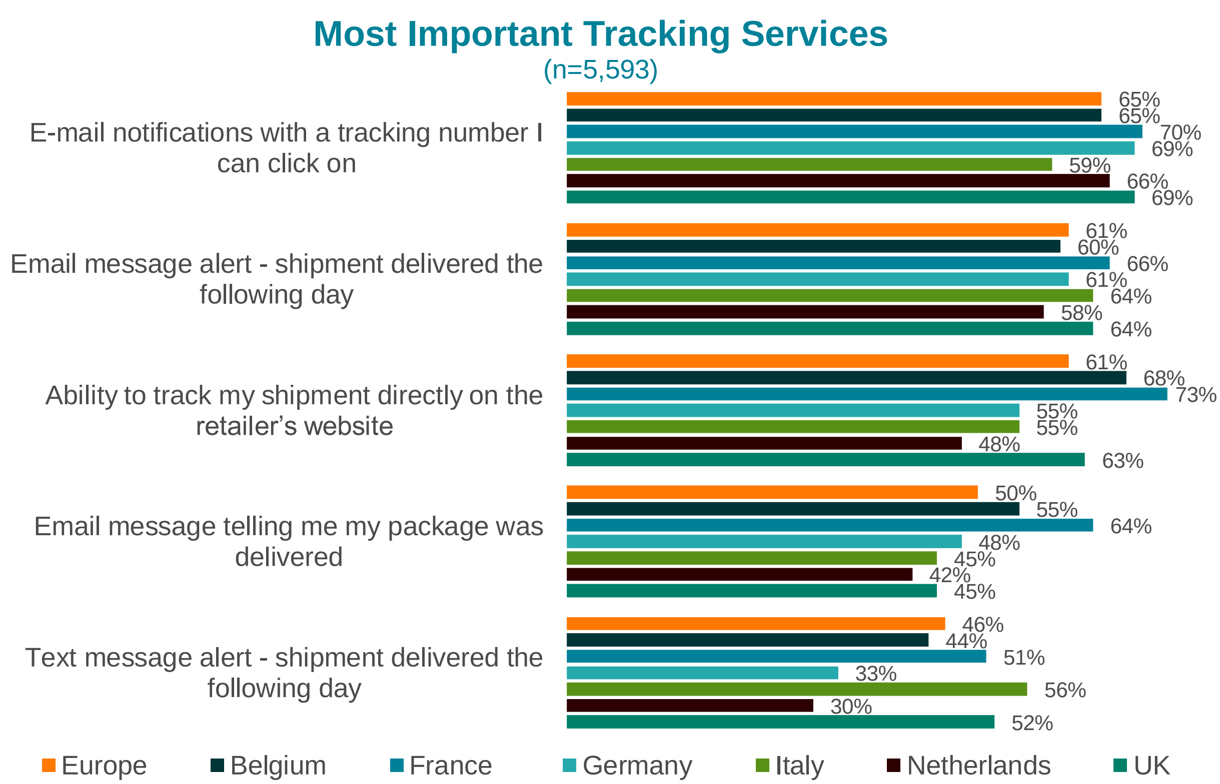
The ability to track packages is an important factor, with half of online shoppers indicating that tracking is an essential service (Figure 28). Most Italians consider it essential (61%), versus only a third of UK online shoppers. The most important tracking-related service for shoppers is e-mail notifications alerting the consumer that their shipment will arrive the following day as well as the ability to track their shipments directly on the retailer's site. French online shoppers are especially keen on these online tracking options. Mobile is emerging to play an important role in shipment tracking as a majority of European consumers indicate the desire for email notifications and alerts regarding tracking and delivery information and nearly half believe text message alerts are important (Figure 29).

Figure 28



Q49. Giving me tracking information for my packages is an important service every retailer should offer. Which of the below best describes how you feel about the above statement?

Figure 29



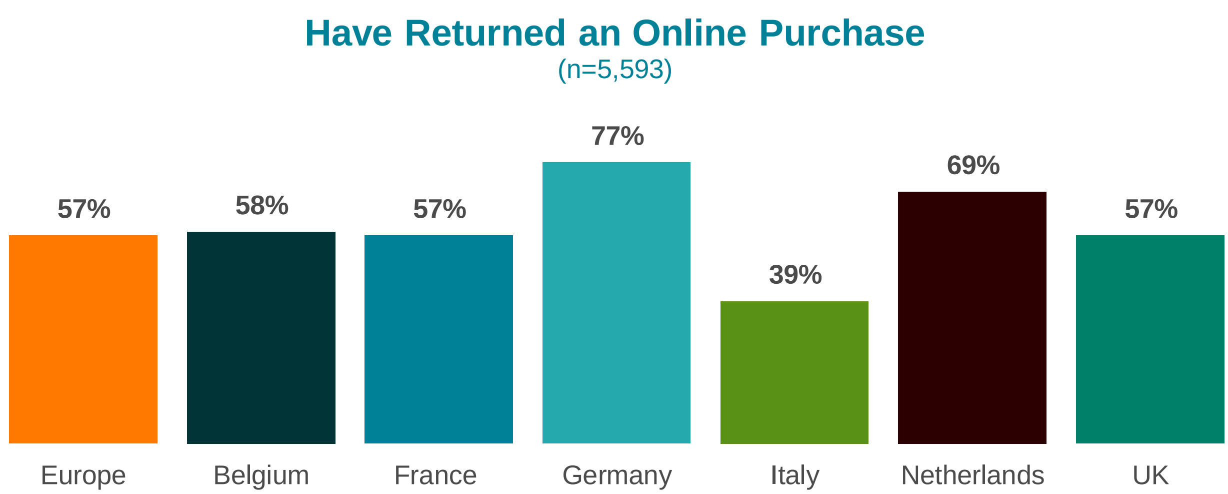
Q50. What is the most important shipment tracking service that a retailer should offer? Please select all that apply and then your top 2 in importance to you.

Returns and Exchanges

While returns and exchanges represent the last phase of the consumers' purchasing process, it is an important aspect of the overall online shopping experience. About two-thirds of European online consumers say they look at a retailer's returns policy prior to making a purchase (especially important for Italian online shoppers at 73%), suggesting that retailers risk losing customers without an easy-to-find policy on their website (Figure 31).

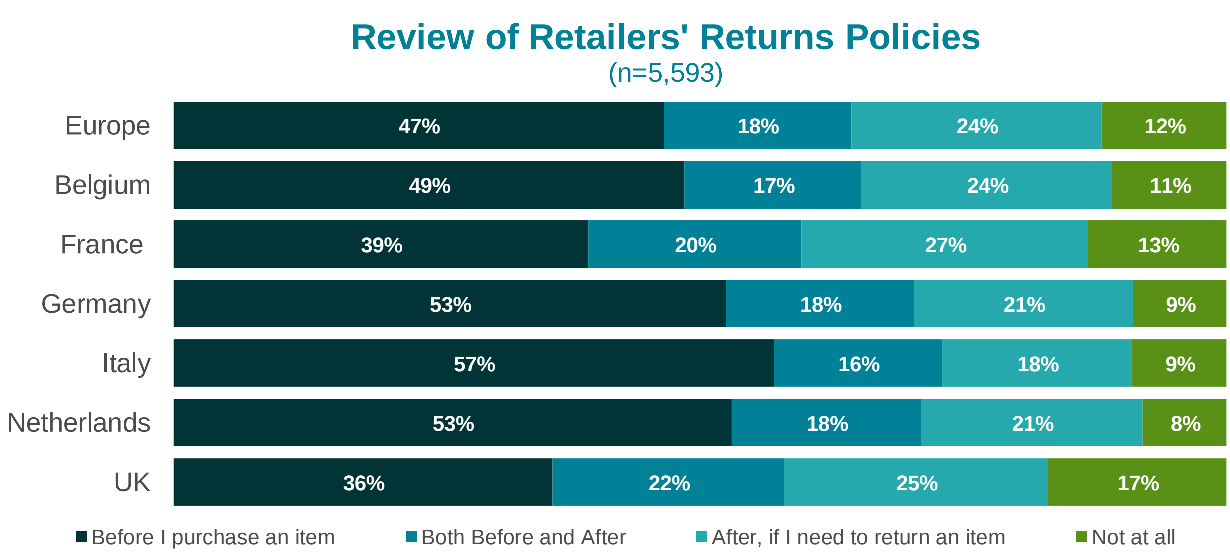
Evidence also suggests that returns are becoming a more important part of the online shopping experience. More than half (57%) of online shoppers said they have returned a product purchased online (German online shoppers are most likely to make a return at 77%) (Figure 30).

Figure 30



Q55. Have you ever returned a product you purchased online for a refund or exchange?

Figure 31



Q50. Do you look for an online retailer's returns policy before or after purchasing an item?

Hassle-Free Returns Drive Recommendations

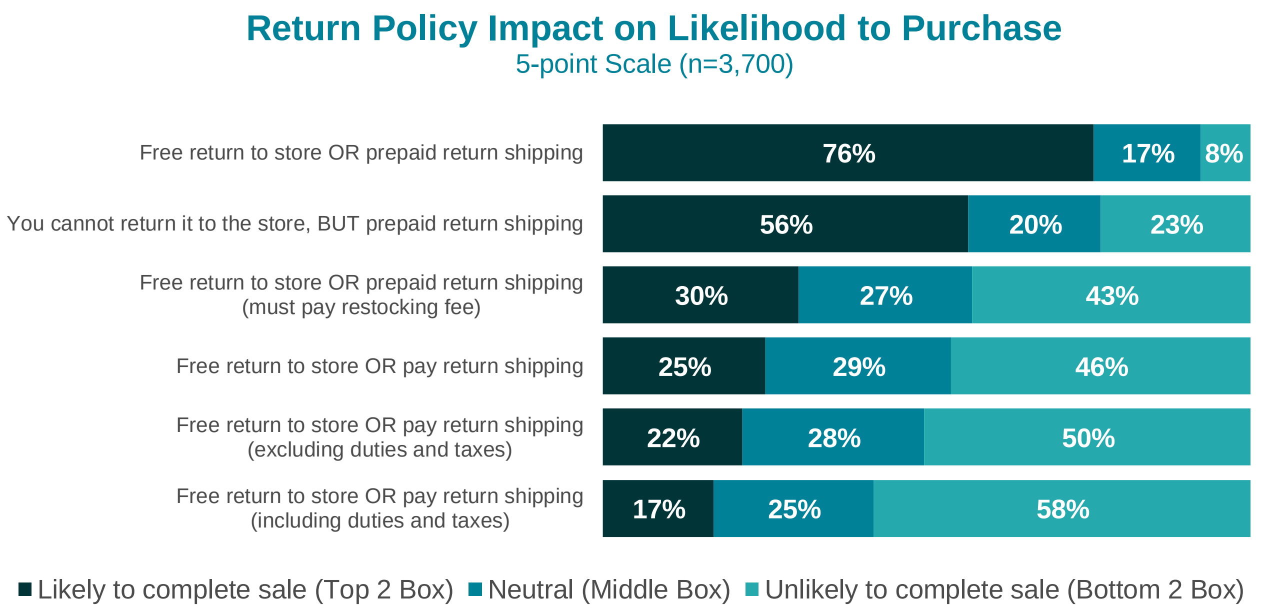
A hassle-free returns policy is likely to lead to recommendations and repeat business from online shoppers. German online shoppers are especially influenced to take action based on a hassle-free returns policy. A hassle-free returns policy will lead online shoppers to shop more frequently with a particular retailer (61% overall), and advocate for that retailer (59% overall, Figure 32).

Figure 32

Q60. How much do you agree with the following statements? If an online retailer offers a hassle-free returns policy, I will …

Consumers prefer a returns policy that allows them to return the purchase directly to the store or ship it back to the retailer for free. Consumers are unlikely (17%) to make a purchase if they have to pay for the return shipping including duties and taxes, even if there is an option to return to the store for free (Figure 33). Given the high percentage of consumers who review a returns policy before purchase, this finding highlights the importance of retailers offering a pre-paid return shipping option and informing customers that such a service is provided.

Figure 33

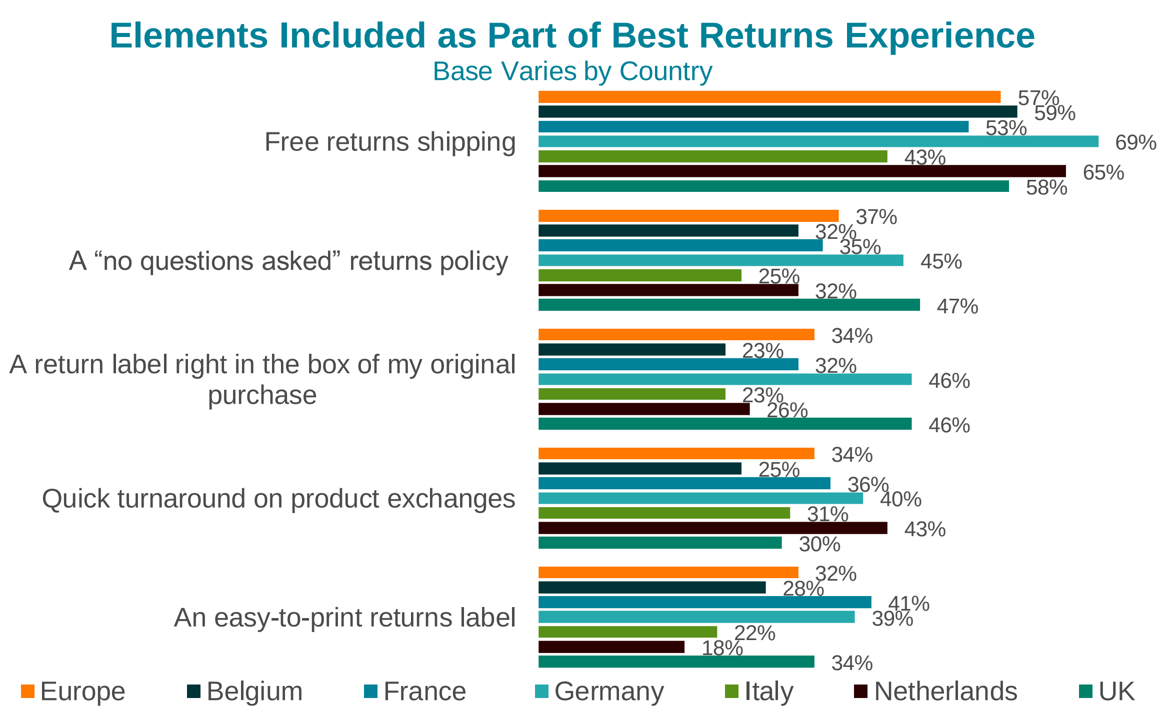


Q56a. You indicated that you look at an online retailer's returns policy before purchasing an item. Thinking of what you look for in a retailer's returns policy, would you complete the sale online if the retailer's "returns policy" stated the following?

Elements of a Positive and Negative Returns Experience

Not surprisingly, free shipping is the top aspect leading to a positive returns experience. But digging deeper, it becomes clear that online consumers want this process to be conducted quickly and efficiently. Especially for online consumers in Germany and the UK, it is important that a returns experience includes a "no questions asked" policy and a quick turnaround for product exchanges (Figure 34).

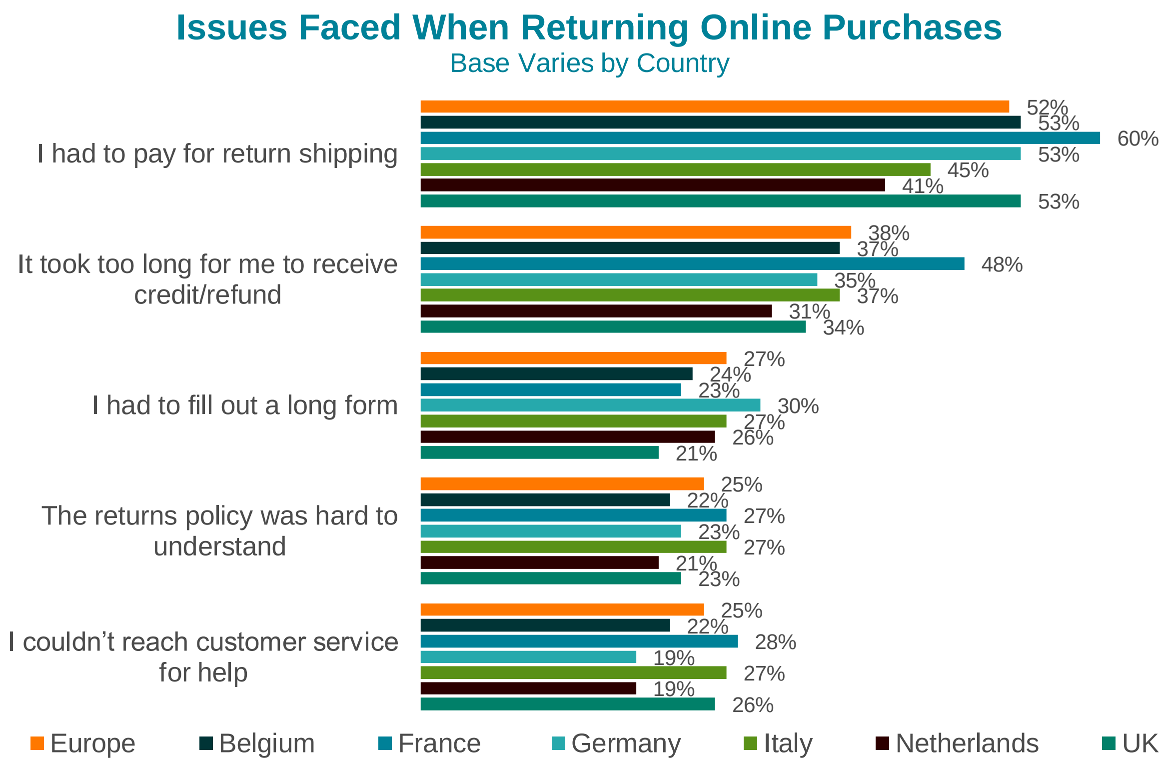
Figure 34



Q58. Thinking of the best returns experience that you have had, what elements were included as a part of this experience? Select all that apply.

What constitutes a bad returns experience for consumers, besides having to pay for return shipping, is having to wait too long for a credit (French online shoppers are most likely to mention this at 48%) or having to fill out a long form (Figure 35).

Figure 35



Q57. What are some of the issues you have faced when returning a product that you purchased online? Select all that apply and identify the top issue.

Conclusions

Overall shopper satisfaction in Europe is fairly high at 76%. There is little variance in satisfaction among countries examined within Europe, as Germany leads with 81% satisfaction and Belgium comes in last at 73%. To deliver on what today's online shoppers want and to improve customer satisfaction, it's crucial to understand the key factors that drive consumers' shopping habits, purchasing behaviours, brand loyalty and retailer recommendations. Factors such as offering free and discounted shipping continue to be an important way to recruit, reward, and retain shoppers – but these are not the only factors. This survey also reveals that retailers may get a better return by focusing on other areas of importance to differentiate themselves from their competitors – areas that may not cost them anything.

In terms of retailer access, 8 in 10 shoppers in most countries prefer to access retailers through digital channels. Shoppers have been slower to adopt mobile shopping than those in other regions surveyed in the *UPS Pulse of the Online Shopper* series, in large part because smartphone and tablet penetration in Europe is lower compared to other regions. Social media usage in Europe is also lower than in other regions, suggesting that while retailers may want to include mobile and social in their strategies in Europe, they are most likely to engage consumers through their websites.

While social and mobile adoption in Europe lags other countries, returns is an area where Europe findings are among the highest of regions examined – and a key area for retailer focus. With more than half of shoppers in Europe having returned an online purchase, it is critical for retailers to understand what shoppers in Europe want from the returns process, particularly in Germany and the Netherlands, where 77% and 69% of shoppers have returned an online purchase, compared to just 39% of shoppers in Italy. While preferences vary from country to country, free returns shipping is the most often-cited element of a best returns experience among shoppers in Europe, followed by a "no questions asked" returns policy, a pre-paid return label included with the original purchase and a quick turnaround on product exchanges. Free and easy returns are also a driver of positive retailer recommendations in Europe.

Also key during the post-purchase process, European online consumers want end-to-end control over their shipments, which includes the ability to track packages through e-mail notifications, the retailer's website and text message notifications. Consumers in France and Italy place a greater emphasis on tracking services, with 58% and 61% listing tracking information as "essential." As seen from the findings, the amount of time consumers are willing to wait for a package depends largely on the package's origin, and retailers should keep these expectations in mind when providing delivery options.

To summarise, retailers can win shoppers over in Europe by:

- Understanding differences in consumers' retail expectations by country
- Facilitating a seamless omnichannel experience
- Meeting shoppers where they are in terms of social and mobile offerings

- Providing tracking information and keeping shoppers informed proactively on delivery status through e-mail and text notifications
- Delivering products when expected
- Enabling a “hassle-free” returns experience in the shopper’s channel of choice

About comScore, Inc.

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