



UPS PULSE OF THE ONLINE SHOPPER™

A Customer Experience Study

Conducted by



WE ♥ LOGISTICS®

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

The rapid growth of e-commerce means the importance of developing a user-friendly, differentiated online shopping experience is steadily increasing for online retailers. With this changing market in mind, UPS® worked with comScore to better understand which components of the online shopping customer experience drive brand preference, customer loyalty, and recommendations. Unlike other research efforts that tend to focus on purchase or web usability, the *UPS Pulse of the Online Shopper* provides insights that cover pre-purchase, checkout and post-purchase.

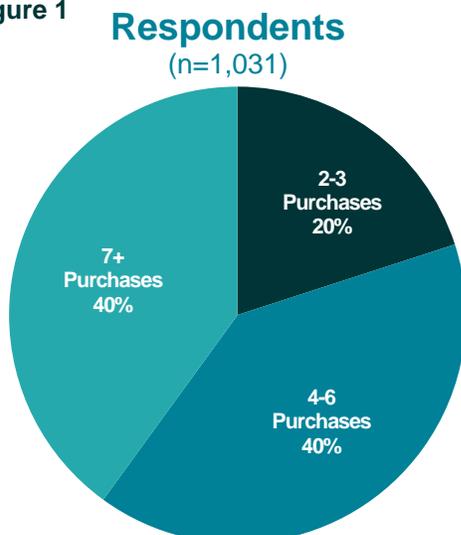
In addition to examining the entire online shopping experience, this study also explores how mobile and social are shaping e-commerce. It covers expectations, preferences and satisfaction of today's demanding consumers for the purposes of providing actionable findings for those retailers seeking to provide an integrated omnichannel shopping experience.

The Canada 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 included in the study are: U.S., Mexico and Canada in North America; U.K., Belgium, Netherlands, Germany, France, and Italy in Europe; Singapore, Hong Kong, China in Asia; and Australia.

To compare across international regions, the topics addressed were the same and included the following:

- ✓ What do consumers want in an online shopping experience?
- ✓ How are mobile and social media channels changing consumers' shopping habits and expectations?
- ✓ What do consumers want from retailers in the online check-out 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?

Figure 1



Methodology

The study analyzes data from a survey of more than 1,000 Canadian online shoppers conducted in March and April, 2013. The survey was offered in both English and French. All shoppers surveyed had to meet the criteria of making at least 2 online purchases in a typical 3-month period. Among those surveyed, 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.

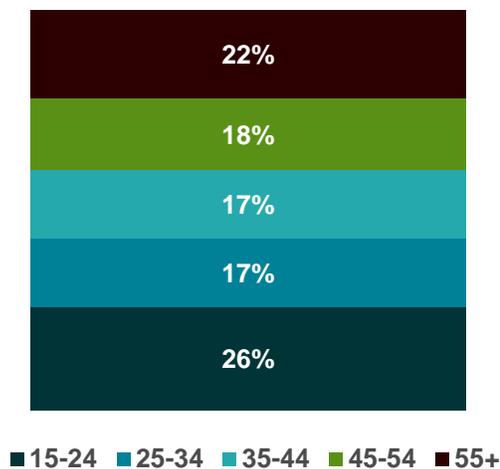
Internet Population Overview

Of the approximately 25.5 million Internet users in Canada age 15+, 26% are between the ages of 15 and 24, and 40% are over the age of 45 (Figure 2). Looking at the rest of North America, 37% of the 24.5 million internet users in Mexico and 19% of the 192 million internet users in the U.S. are between 15 and 24, with 19% and 45% over 45, respectively.

Figure 2

Internet Population by Age

Total Internet Population (Age 15+): 25.5 Million



Source: comScore Media Metrix, May 2013

Key Findings

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

- **Online and Mobile Shopping on the Rise, Yet Stores Remain Key Access Point in Canada**
A high penetration of smartphone (63%) and tablet (43%) ownership in Canada indicates that mobile shopping could soon be on the rise in the region. However, despite the increase in mobile adoption and apps being perceived as “user friendly”, websites remain the most popular method to access online retailers in Canada today. Brick and mortar stores also remain important: a third of Canadian online consumers prefer this method of access to retailers, twice the proportion of Mexican online consumers and in line with Americans.
- **Canadian Shoppers are Cost and Time Conscious**
Shipping costs are the top reason for abandonment of an online shopping cart in Canada, followed by the time it takes to receive a package. Not surprisingly given these factors,

consumers in Canada highly value free shipping offers from retailers. Despite being cost and time conscious, online consumers indicate that communicating shipping costs and delivery times early in the online shopping experience can help alleviate concerns over shipping costs and delivery timing. Similar sentiments are seen in the U.S. and Mexico.

- **Online Shoppers in Canada are Patient when Given Delivery Options**

For most purchases, Canadian shoppers are willing to wait nearly 10 days, almost 3 days more than their U.S. counterparts. However, half of Canadian online consumers most often select 3-6 days shipping time and 43% select 5-12 days. As in other regions of the world, these findings illustrate the importance of providing multiple shipping options to online shoppers.

- **Returns Provides an Opportunity for Retailer Differentiation**

With more than half of Canadian shoppers indicating that they view a returns policy prior to making a purchase, retailers must ensure they have a transparent and satisfactory returns policy. Over 4 in 10 shoppers indicated they would be unlikely to complete a sale if they had to pay for returns shipping even if they could return for free in-store, underscoring the importance of providing a pre-paid shipping option for returns.

The State of Online Shopping Satisfaction

Satisfaction with Aspects of Online Shipping

Consumer satisfaction with online shopping overall is high at 77% (those survey respondents selecting the top 2 boxes on a 7-point scale, Figure 3). The dynamics of online shopping with which respondents are most satisfied are those related to the retailer website – product variety and ease of use. Online shoppers are least satisfied with control and flexibility in receiving their purchases, which is shown across 4 of the 5 lowest-rated elements. Shoppers want the ability to control where they receive their package and when and they also want the option to re-route their package after it has shipped. A green/environmentally friendly shipping option is one of the areas where shoppers are the least satisfied.

Figure 3



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

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

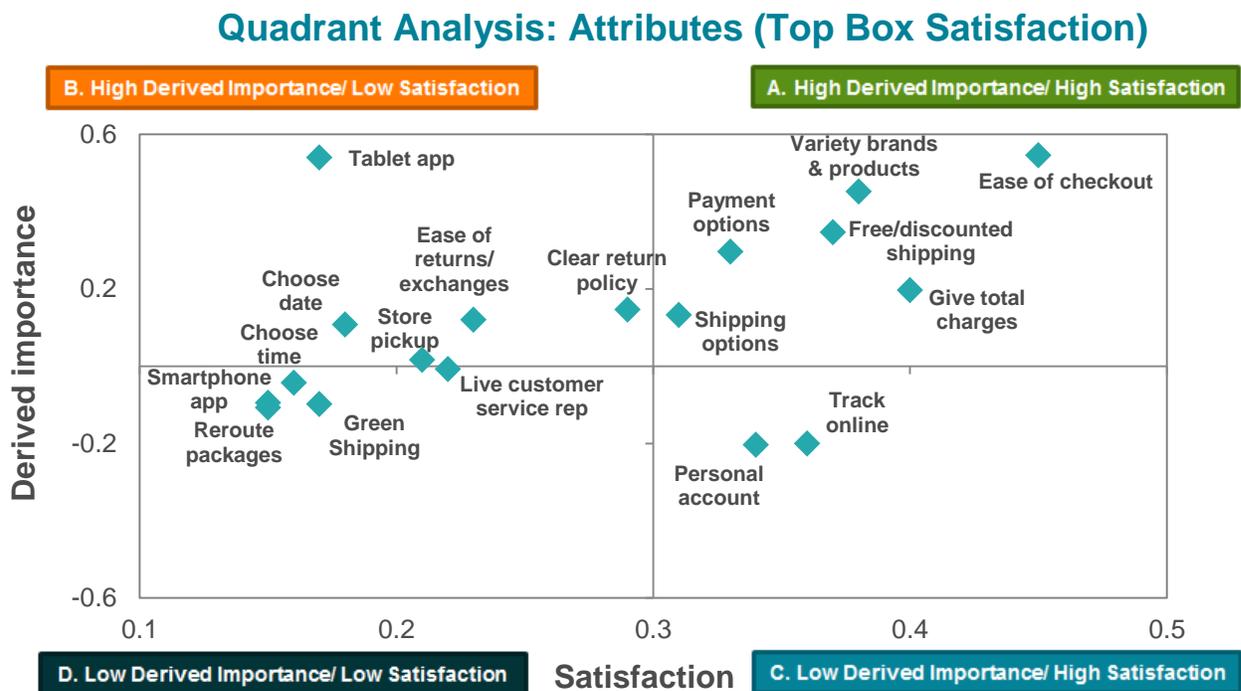
Understanding which elements are important for consumers will help retailers seeking to improve their shoppers' satisfaction and increase loyalty. To better understand which elements drive satisfaction, a quadrant analysis was performed, plotting the "derived" importance of each factor versus the satisfaction rating. Derived importance was calculated using statistical modeling techniques and indicates which attributes of the online shopping experience examined in this study were better predictors of overall online satisfaction versus others. Higher derived importance indicates that the attribute has a stronger impact on overall satisfaction versus attributes of lower importance. To hone in on factors that will drive a high level of satisfaction, the quadrant analysis below is plotted using "top box" satisfaction (those survey respondents selecting the top box on a 7-point scale, Figure 4).

Items in the upper-right quadrant including product variety, ease of checkout and free/discounted shipping are those with both high importance and high satisfaction, making them particularly crucial elements for retailers to deliver in order to maintain high levels of satisfaction.

The upper left quadrant of the chart contains the factors driving satisfaction that are highly important but currently have low satisfaction. In this study, 5 factors fall into this quadrant: availability of a tablet application, ease of returns/exchanges, availability to choose the date a package is delivered and a clear and easy to understand returns policy. These should be key areas of focus for retailers looking to increase their overall customer satisfaction. The positioning of tablet apps within this chart should be of particular interest to retailers in Canada, as this was the only region examined where online shoppers indicated tablet apps to be highly important but not satisfying. The upper left quadrant is where retailers should invest the majority of their time to help drive higher overall online satisfaction.

The factors in the bottom half of the chart are of lower “derived” importance in driving overall online shopping satisfaction and therefore could be considered slightly lower on the priority list in terms of where retailers should invest their efforts. Four low-derived importance factors fall closely to quadrant B: availability of a smartphone application, in-store pickup, availability of live customer service representatives and the option to reroute packages represent opportunities retailers could also improve to increase customer satisfaction.

Figure 4

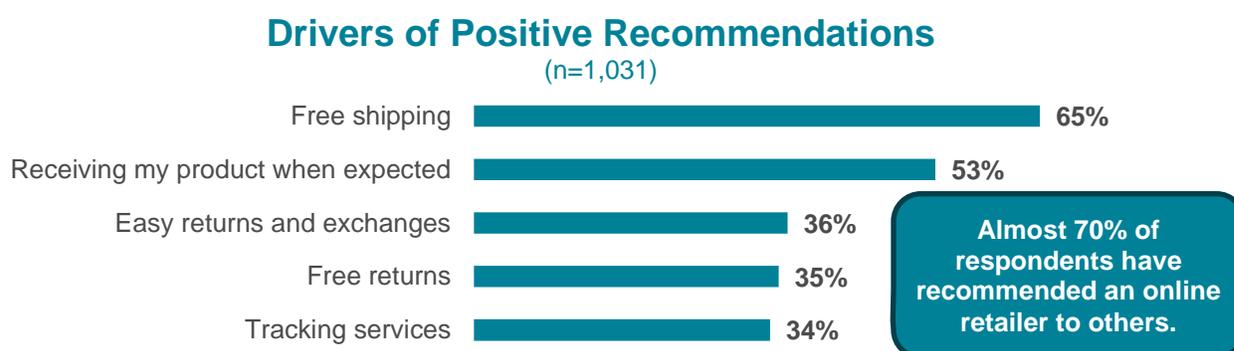


Note: Only aspects which are statistically significant drivers of overall online shopper satisfaction are displayed

Factors Driving Retailer Recommendations

In addition to retaining satisfied customers and acquiring uncommitted potential customers, another way retailers can increase their business is through customer advocacy and referral. When asked what has led to a shopper recommending a particular retailer, the availability of free shipping or discounted shipping was cited as the top factor, followed by timely arrival of shipments and free or easy returns (Figure 5). While cost savings is perhaps a predictable factor in retailer referral, the other leading factors are less obvious. Retailers should take note that not only do consumers value timely delivery and seamless returns, but they are willing to advocate on their behalf should they meet customers' expectations in this regard.

Figure 5



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 lead to negative word-of-mouth. The top such factor was shipping costs being too high based on the product price (69%, Figure 6). Other important factors include shipping costs being too high based on the expected delivery date (54%), products arriving damaged (50%) and delivery taking longer than promised (50%).

Figure 6



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

Valued Options for Omnichannel Shoppers

When examining aspects driving likelihood to shop with a retailer, shoppers demonstrated a distinct preference for retailers who deliver an integrated omnichannel experience – both in terms of online/in-store working together and availability of mobile shopping features. The single most important factor, cited by 65% of respondents, was the ability to buy online and make returns in-store, while the second most important factor was availability of in-store pickup (Figure 7). These two aspects were also the most important across all geographies examined.

Figure 7



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?

On the mobile side of the equation, more than one-third of smartphone owners said they were likely to shop with a retailer who provides location-enabled coupons or promotions to their smartphone, while 33% of tablet owners said the availability of a tablet app increased their likelihood to shop with a retailer (Figure 7). Further emphasizing the desire for an integrated omnichannel experience, almost 30% of shoppers want to be able to purchase in store with their mobile device and want a mobile application for their smartphone (Figure 7).

“Ship to store” services tend to be viewed by consumers as a means to avoid shipping costs, while leading to incremental sales gains for retailers. Although over a third of online shoppers in Canada are likely to select “ship to store,” only 29% purchased other items in store after selecting “ship to store,” lowest among all countries examined (Figure 8). Regardless, this service continues to represent an incremental sales opportunity for retailers who offer this option.

Figure 8

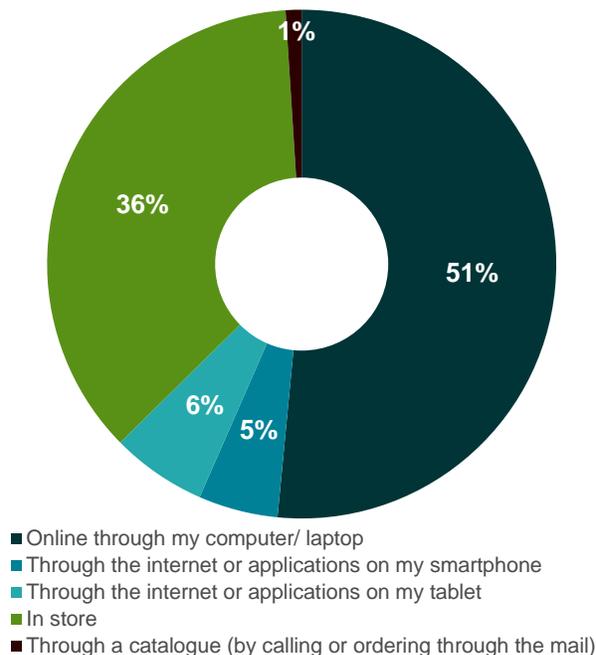
Attitudes Toward “Ship to Store” Service (n=1,031)



Q48. Of the choices below, which do you find best match your attitude toward buying online and picking up at a store? Please select top 2 choices only.

Figure 9

Retailer Access Preference (n=1,031)



Mobile Playing a Role

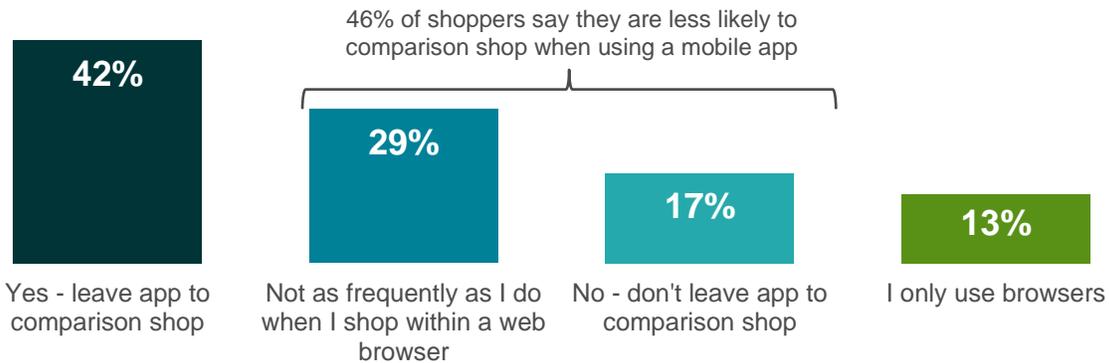
Of the shoppers surveyed, 63% reported owning a smartphone and 43% owned a tablet. Compared to other countries examined, however, Canada has the lowest percentage of smartphone and tablet owners making purchases using these devices (46% for smartphones and 58% for tablets). Another factor driving the influence of the mobile space is that around six in ten shoppers prefer to access retailers via digital channels (Figure 9). Given the growing penetration of smartphones and tablets, it is becoming increasingly important for retailers to develop a strong presence in the mobile commerce space.

Mobile Shopping Habits

Nearly half of consumers using a retailer’s mobile app are less likely to comparison shop when using an app versus a browser (Figure 10). This finding underscores the importance of having an engaging, user-friendly mobile app.

Figure 10

App-Based Mobile Comparison Shopping (n=408)

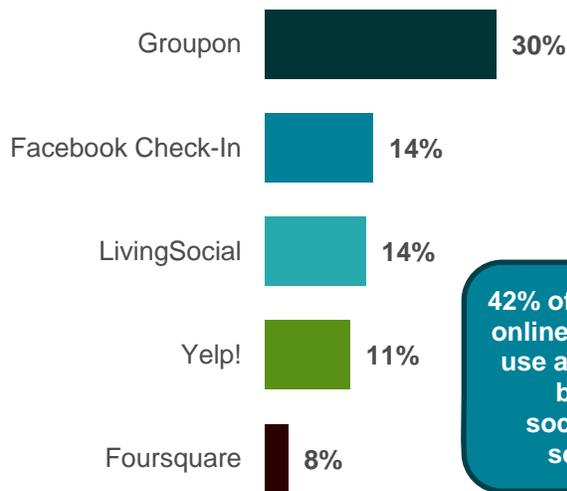


NEWQ_MOB1. When you shop within a retailer's mobile app, do you leave that app to comparison shop across other retailers?

In addition, a mobile app allows retailers to provide deals and promotions according to the user's location. Of the nearly 42% of shoppers who use location-based deals services (Figure 11), 50% would like to receive deals and promotions based on their location and/or transaction history (Figure 12).

Figure 11

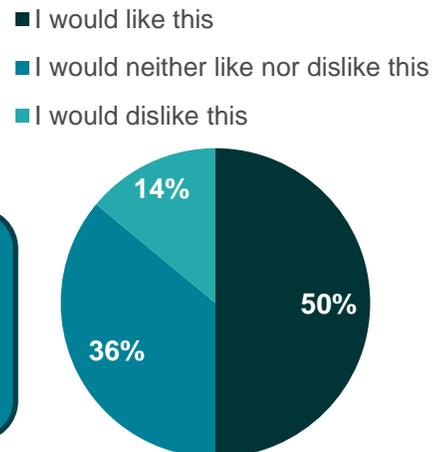
Use of Location-Based Social/Deal Services (n=1,031)



42% of Canadian online shoppers use a location-based social/deal service

Figure 12

Interest in Having Deals/Promos Sent by Retailer (Using Location & Transaction History) (n=440)



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?

Improving apps, particularly in terms of facilitating the browsing and transaction processes, can help retailers reduce friction and improve mobile conversion. With the inclusion of value-added features that leverage what's unique about the mobile medium – namely location-enabled services – retailers can significantly enhance their customers' mobile experience.

Social Commerce

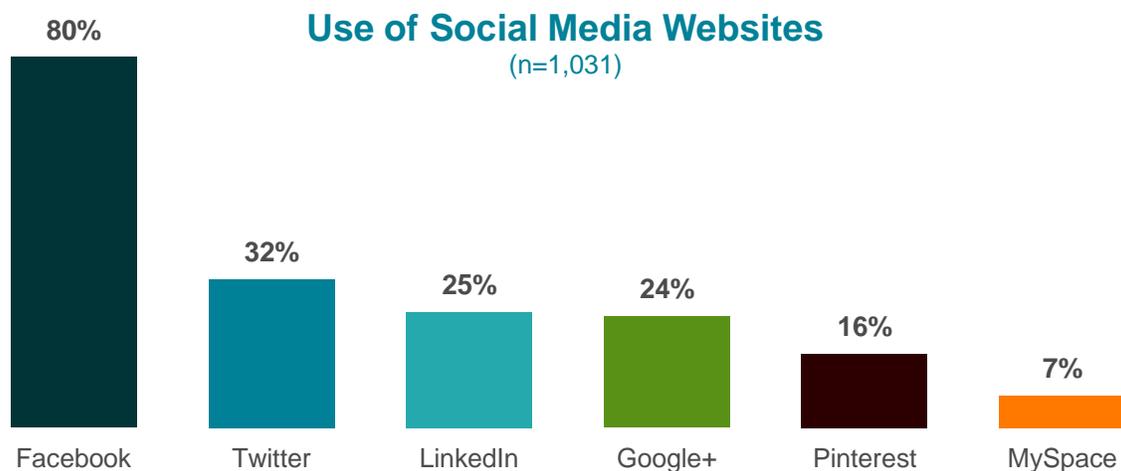
Usage of social networking websites continues to be led by Facebook, but there are some rising stars to watch. LinkedIn, Tumblr, Pinterest and Instagram are all seeing strong growth rates across PC access, establishing themselves as notable players in the market drawing millions of visitors each month and while Twitter has been relatively flat in PC access, it has seen impressive growth in mobile access. Additionally, Canadian consumers are watching more videos online versus a year ago. Mobile subscribers to social media sites grew by 10% in Canada since December, 2011.

Source: comScore Media Metrix, Video Metrix, and MobiLens, May 2013

Social Media Drives Engagement with Retailers

The social media component of the survey revealed certain insights about how and why consumers engage with retail brands on the various channels. Facebook ranks as the most popular by a considerable margin, followed by Twitter, LinkedIn and Google+ (Figure 13).

Figure 13



SM1. Do you use any of the following social networking websites? Please select all that apply.
SM2. Do you "Like" any retailers on Facebook?

Almost two-thirds of Facebook users said that they have "liked" a retailer's brand on Facebook, with 40% doing so to receive a promotion or incentive from that brand (Figure 14). Among those who "like" a brand on Facebook, 87% said they pay attention to retailers' updates (Figure 15). This finding highlights the importance of Facebook as a marketing channel for retailers given its combination of audience reach and engagement with promotional content.

Figure 14

Reasons for “Liking” a Retailer/ Brand on Facebook (n=480)



Figure 15

Amount of Attention Paid to Retailers' Updates (n=480)



87% pay some attention to retailers' updates, giving retailers a channel for engagement.

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

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

Checkout Process

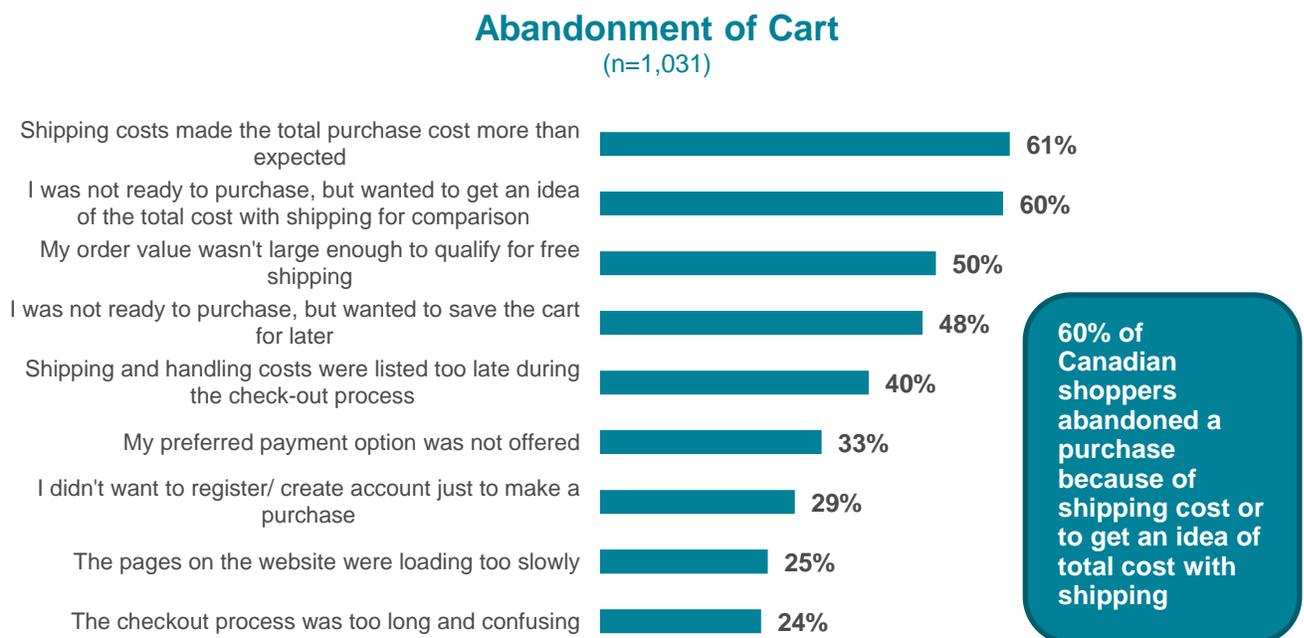
Study results also highlight the importance of the checkout process for retailers. While all retailers seek to maximize conversion, the different drivers behind shopping cart and checkout behaviours are not always widely understood.

Factors Driving Cart Abandonment

With 88% of online shoppers indicating that they have placed items in the shopping cart and left the website without making a purchase, clearly shopping cart abandonment is a significant issue that represents lost opportunity for retailers.

Among those online shoppers in Canada who have abandoned their shopping carts, shipping cost was the most oft-cited reason among 61% of these respondents (Figure 16), higher than in any other country examined. On the other hand, more than three-quarters of online shoppers said they have added items to their shopping cart in order to qualify for free shipping, suggesting that retailers minimum spending thresholds for free shipping are effective at inducing consumers to spend more.

Figure 16



Q24. When shopping online, have you ever placed items in the online cart or basket but then left the website 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, more than three-quarters say they want to see free shipping options at check-out (Figure 17). The second most important consideration (among 64% of respondents) is being provided with estimated delivery date and shipping costs early in the process without having to enter all of their

information. Consumers prefer to have their expectations set early in the process to save them time or unnecessary hassle.

Figure 17

Options Considered Important in Check-Out Process

(n=1,031)



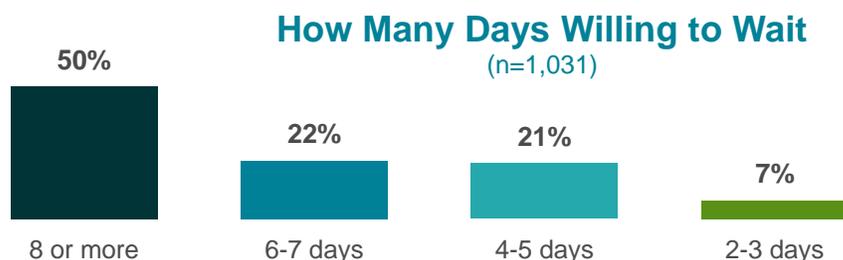
More than half of shoppers prefer to see estimated shipping costs and delivery dates early in the process.

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

Setting Delivery Expectations

As shown above, about two-thirds of online shoppers say that an estimated or guaranteed delivery date is important at check-out (Figure 17). However, consumers in Canada are willing to wait an average of approximately 10 days to receive their online purchases, longer than any other country examined. While about 30% of customers stated that they are not willing to wait more than 5 days for most of their purchases, 50% said that they would be willing to wait 8 days or more (Figure 18).

Figure 18



On average, consumers are willing to wait 9.8 days to receive their online purchases.

Q41. Have you ever decided not to make a purchase because the estimated time when you would receive your item(s) was too long or not provided?
 Q42. What was the estimated delivery time from purchase (in days) that caused you not to make your purchase?

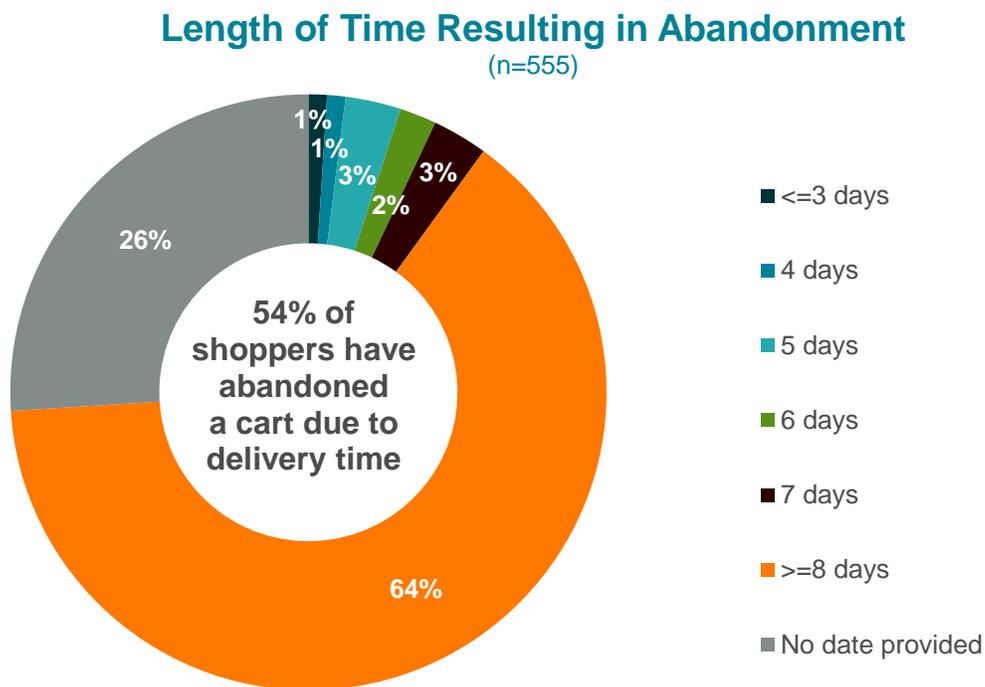
Delivery Dates Can Drive Cart Abandonment

Over half of online shoppers indicated that they have abandoned their shopping cart due to the estimated delivery date (Figure 19). Of online shoppers that have abandoned their cart due to estimated delivery time, 26% indicated that no estimated delivery was shown. With many purchases having some time consideration – even if that timing is not urgent – such cart abandonment is understandable. Consumers prefer certainty to uncertainty.

26% of shoppers who abandoned their cart due to delivery time did so because no estimated delivery date was provided.

Among those who were shown an estimated delivery date and abandoned their cart, almost two-thirds of the time the estimated delivery time was 8 days or more (Figure 19). So while there is some overall tolerance for longer delivery times, in a competitive shopping environment consumers may seek alternatives when the delivery time is not satisfactory.

Figure 19



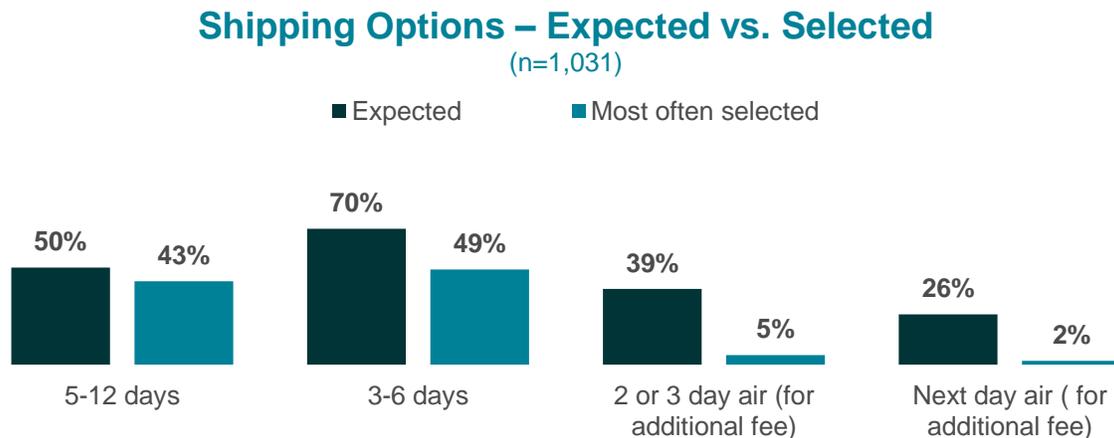
Q41. Have you ever decided not to make a purchase because the estimated time when you would receive your item(s) was too long or not provided?

Q42. What was the estimated delivery time from purchase (in days) that caused you not to make your purchase?

The Delivery Experience

Shipping and delivery are key value drivers in the online shopping experience, with consumers preferring different options to meet those needs. Online shoppers expect several delivery options to be available, with half expecting delivery in 5-12 days, 70% expect delivery in 3-6 days and a third expecting a 2 or 3 day air option (Figure 20). Just over a quarter (26%) also expect a next-day shipping option. Online shoppers stated they chose the most economical shipping option half of the time and the fastest option only 2% of the time. More than 20% of online shoppers say they “most often” choose to pay an additional fee for faster delivery when making a purchase.

Figure 20



Q38. When shopping online, which of the following shipping options do you expect online retailers to offer? Choose all that apply.
Q39. When shopping online, which shipping option do you choose most often?

Package Tracking an Important Feature

As illustrated in the quadrant analysis (Figure 4), the ability to track packages is an important factor in online shopping satisfaction, with more than half of online shoppers indicating that tracking is an essential service (Figure 21). The most important tracking-related services for shoppers were e-mail notifications with a link to track and the ability to track directly on the retailer’s website (Figure 22), which was found to be more important in Canada than any other country examined.

However, mobile is also emerging to play an important role in shipment tracking. Consumers also indicate a desire for text notifications with their tracking number, text alerts when their package will be/has been delivered and the ability to track their shipment on their mobile device

Figure 21



Q40. 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 22

Most Important Tracking Services

(n=1,031)



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

Returns and Exchanges

Returns play an even larger role for online retailers because online shoppers want to lower risk for goods purchased without the opportunity to see, touch, or feel them. While returns and exchanges represent the last phase of the consumers' purchase process, it is often their first consideration when visiting a new retailer website. More than half of customers say they look for the return policy prior to making a purchase online, suggesting that retailers risk losing customers without an easy-to-find policy on their website (Figure 23).

Evidence also suggests that returns are becoming a more important part of the online shopping experience. Nearly half (49%) of online shoppers said they have returned a product purchased online (Figure 24).

Key Takeaway: 49% of online shoppers have returned a product purchased online.

Figure 23

Review of Retailers' Returns Policies

(n=1,031)

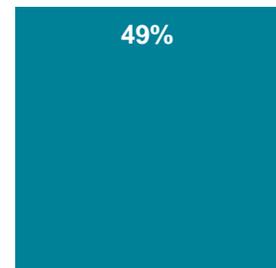


Q55. Have you ever returned a product you purchased online for a refund or exchange?
Q56. Do you look for an online retailer's returns policy before or after purchasing an item?

Figure 24

Have Returned an Online Purchase

(n=1,031)



Hassle-Free Returns Drive Recommendations

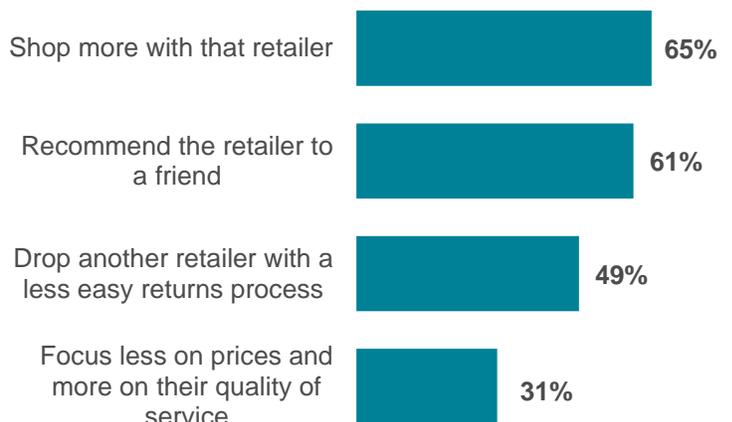
A hassle-free returns policy is likely to lead to recommendations and repeat business from online shoppers. It also means that consumers will shop more frequently (65%) with a particular retailer and advocate for that retailer (61%, Figure 25). In addition, 76% of online shoppers said that a hassle-free returns policy would influence their decision to buy from a retailer from which they are shopping for the first time.

Consumers prefer a returns policy that allows them to return the purchase to the store for free or ship it back to the retailer for free. If both of those options are not available, consumers

Figure 25

If an online retailer offers a hassle-free returns policy, I will...

3-point scale (n=1,031) – Top Box Agreement



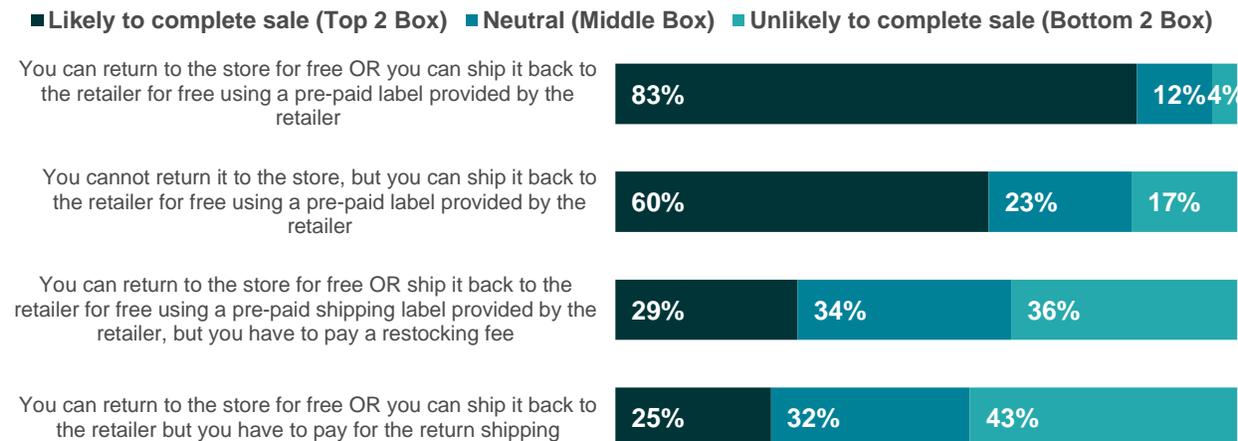
Q60. How much do you agree with the following statements? If an online retailer offers a hassle-free returns policy, I will ...

would prefer free shipping back to the retailer over returning to the store. Consumers are least likely to make a purchase if they have to pay a restocking fee, even if the return shipping is free (Figure 26).

Figure 26

Returns Policy Impact on Likelihood to Purchase

5-point Scale (n=2,058)



Q56a. You indicated that you look at an online retailer's return 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

A good returns experience is as important as a good returns policy. Online shoppers who have made returns want free returns shipping and a "no questions asked" return policy (Figure 27). An automatic refund is also very important in ensuring a good returns experience.

Figure 27

Elements Included as Part of Best Returns Experience

(n=494)



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, are paying a restocking fee and waiting too long for a credit (Figure 28).

Figure 28

Issues Faced When Returning Online Purchases

(n=494)



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

To deliver on what today's online shoppers want, it is crucial to recognize 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 in Canada as well as around the world. Consumers in Canada are particularly cost-conscious, especially during the checkout process and online shoppers in Canada are among the top two groups in the world to rank free shipping as an important factor during check-out. For retailers that don't offer free shipping, providing a variety of shipping methods and pricing options is crucial. With 61% of shoppers in Canada having reported abandoning an online shopping cart due to excessive shipping costs, it's essential to not only provide a variety of options, but also to ensure that consumers know their options up-front.

Beyond free and discounted shipping, study findings reveal several other areas that retailers can focus on to drive consumer loyalty and differentiate themselves from their competitors. For example when looking at returns, while free shipping is still important, with 63% listing free returns shipping as an element included as part of their best returns experience, 58% of consumers cite a "no questions asked" returns policy and 44% list a pre-paid return label included with the original purchase as key factors of a best returns experience.

In terms of retailer access preference, Canada ranks second highest among all countries surveyed when it comes to shoppers that prefer to access retailers in store versus online or through a catalogue. In addition, Canada has the lowest percentage of smartphone and tablet owners who make purchases on their respective devices, at 46% and 58% respectively. While some of this may be due to consumer preference, it is also clear that shoppers want more out of mobile offerings from retailers. Looking at what factors have a high derived importance but low satisfaction among shoppers in Canada, the ability to purchase through a tablet app tops the list. Retailers offering a quality shopping experience through a tablet app can better appeal to the 43% of shoppers in Canada who own tablets.

To summarize, retailers can improve the customer experience for shoppers in Canada by:

- Continuing to offer free and discounted shipping options and providing these options early in the checkout process
- Facilitating a seamless cross-channel experience, including in-store, online and via mobile device
- Enhancing current tablet app offerings and capabilities
- Providing tracking information with orders and keeping shoppers informed proactively on delivery status
- Delivering products when expected
- Enabling a "hassle-free" returns experience through the shopper's channel of choice

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About UPS

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