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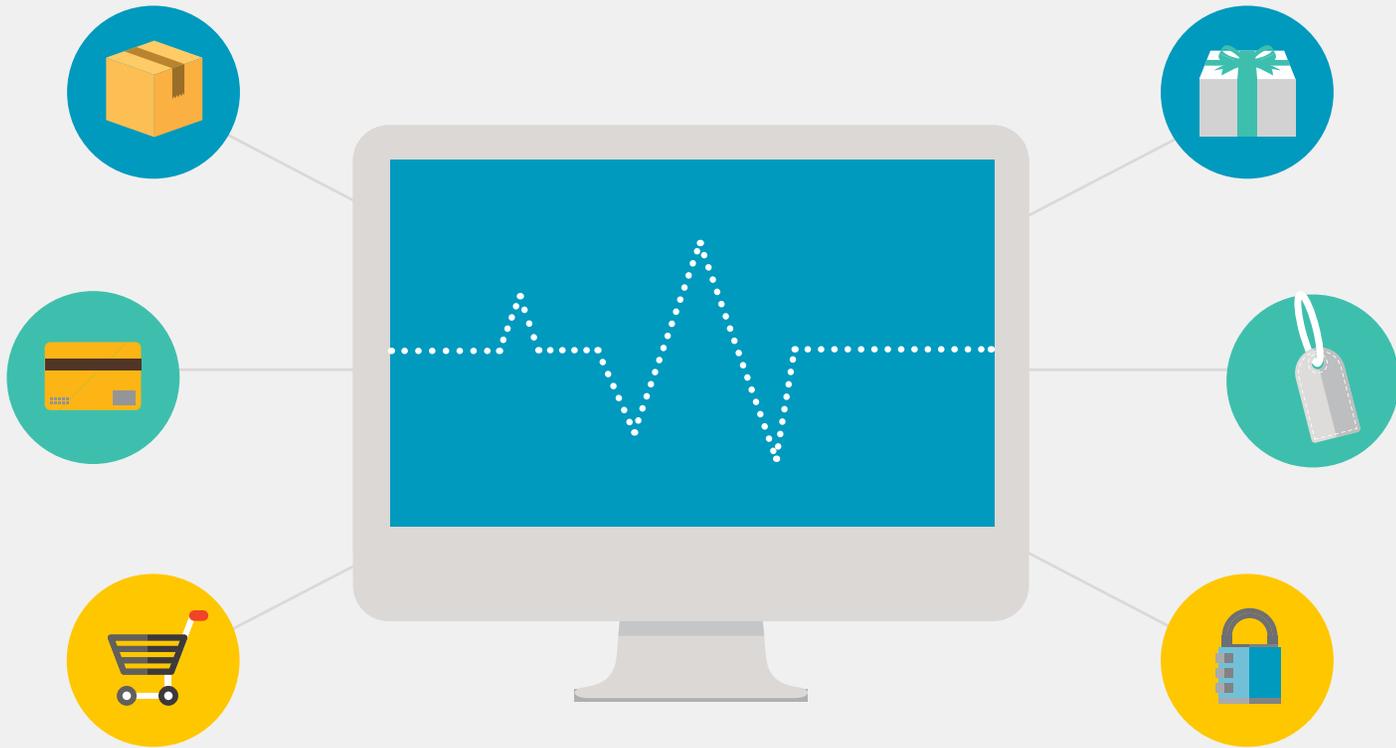
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# 2014 UPS Pulse of the Online Shopper™

A Customer Experience Study conducted by comScore

The 3rd annual study delivers insights into shopping preferences.  
It also explores current levels of satisfaction with online and  
omnichannel shopping.



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The 2014 UPS Pulse of the Online Shopper™ Study reveals how numerous factors – ranging from mobile and social media to shipping and delivery options to security and post-purchase activities – have an impact on the online customer experience as well as on purchasing decisions for today's “flex” shoppers. Consumers are increasingly looking for omnichannel options, and the role of the store is evolving. Mobile is growing yet barriers to mobile purchasing remain. These and other findings are explored in the following pages of this executive summary.

Conducted by comScore, the 2014 study analyzes data from 5,800 U.S. online shoppers. All shoppers surveyed make at least 2 online purchases in a typical 3-month period.

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# Today's online shopping experience

While overall consumer satisfaction with online shopping continues to be high, there are still areas for improvement, particularly around customer service, online customer profiles and ability to checkout as a guest.

## Satisfaction With Aspects of Purchase Experience



72%

Ability to see the expected delivery dates of the products



68%

Ease of checkout (1 or 2 clicks)



65%

Number of shipping options



64%

Alternative payment options



63%

Availability of free shipping



62%

Ability to see the inventory status of products selected



58%

Ability to checkout as a guest



57%

Ability to have your customer profile pre-populated for time savings



53%

Access to customer service information within the checkout experience



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# Today's online shopping experience

Despite the continued growth of m-commerce, consumers prefer to research and purchase products on their desktop or laptop computers.

## Preferred Method of Access to Multichannel Retailers

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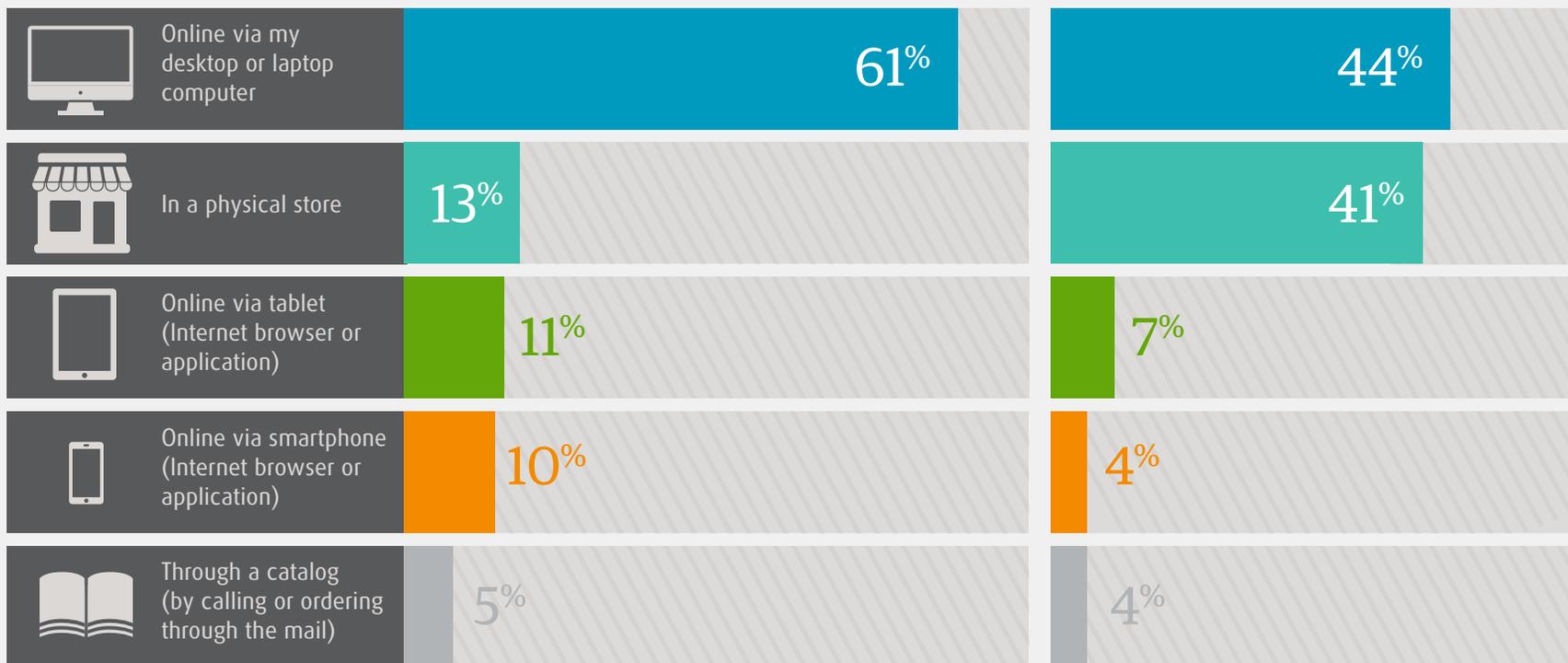
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### Researching Products

### Purchasing Products

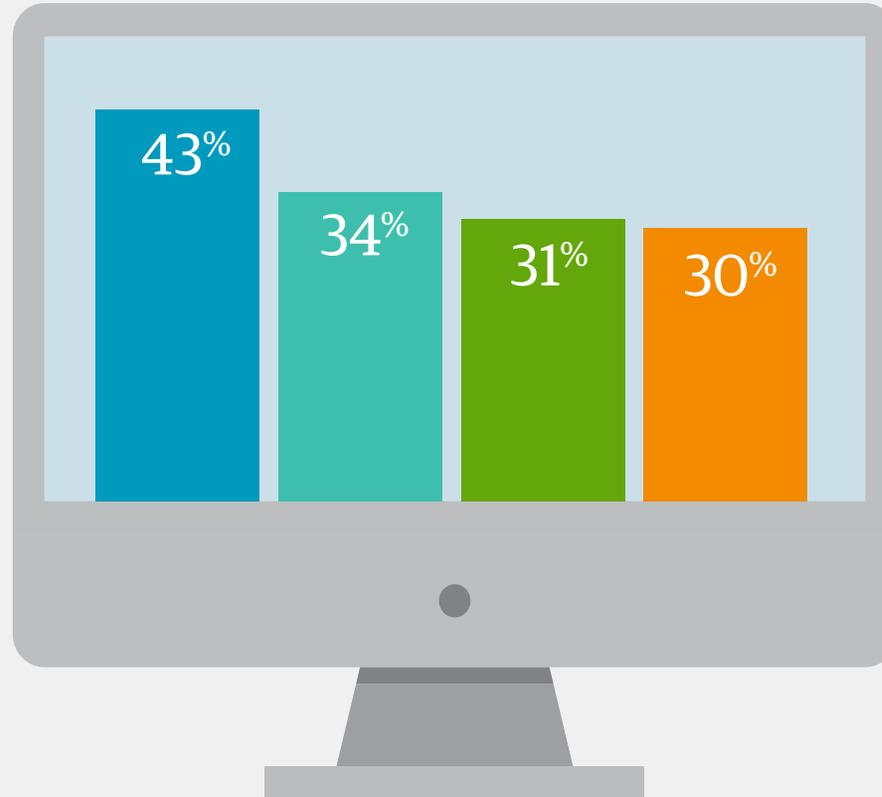




# Mobile

Online shoppers love their smartphones but often struggle with matching the desktop experience.

## Reasons for Shopping on Computer vs. Mobile Device



- Can't get clear or large enough image of the product
- Product information cannot be easily viewed
- Hard to compare products
- Concerns about giving my credit card information over a mobile connection

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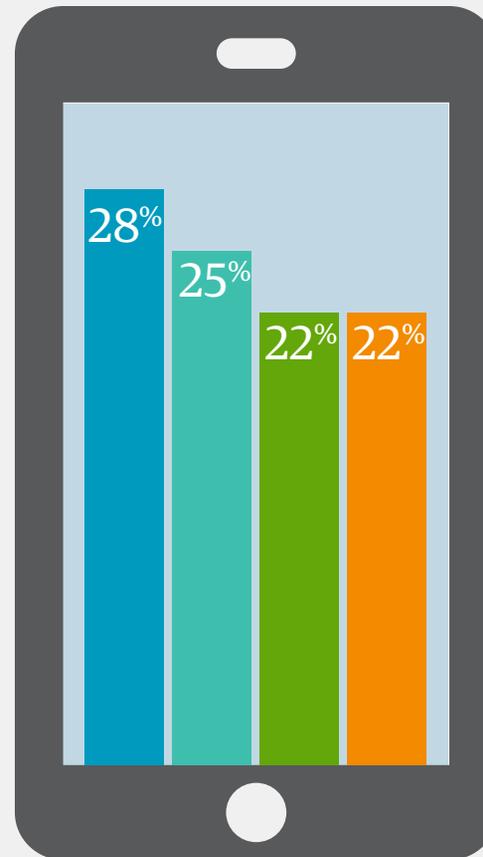




# Mobile

Despite the challenges with purchasing on mobile devices, consumers use their smartphones for several other activities.

## Frequency of Mobile Activities - Weekly



- Tracked delivery
- Researched products on your mobile device prior to visiting a store
- Researched products and alternatives on a mobile device during a store visit
- Located stores or checked inventory

Online shoppers use their mobile devices for several different pre- and post-purchase functions. Tracking deliveries and research occur most often.

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# Omnichannel

Online shoppers complete their purchases in a variety of ways when interacting with multichannel retailers.

## Percentage of Time Each Method is Used

### SINGLE CHANNEL (60%)



Search online

39%



Buy online



Search in store

21%



Buy in store

### OMNICHANNEL (40%)



Search in store

7%



Buy online



Buy online

6%



Pick up in store



Search online

13%



Buy in store



Research online  
and in store



7%



Buy online



Research online  
and in store



7%



Buy in store

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# Omnichannel

Among those who researched in store but decided to buy online, the top four reasons given were not being ready to make the purchase, wanting to do additional research, not wanting to carry the item home and buying a gift that the consumer wanted to ship online.

## Frequency of Reasons Influencing Consumers to Purchase an Item Online Instead of In Store



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# Role of the Store

Many consumers, especially millennials, are interested in enhancing their in-store shopping experience through new digital capabilities.

## Appeal of Shopping Conveniences to Millennials



43%

Electronic receipts sent to me via email or text



41%

An in-store kiosk that allows you to order products that are either out of stock in store or not sold in stores



41%

Electronic shelf labels I can scan to learn more about the product, check availability or make a purchase



37%

Mobile checkout with my own phone or tablet while in store



36%

Ability to purchase items in a window display for same-day delivery



35%

A touch screen or voice activated sign to interact with to receive information, make purchase or arrange delivery



33%

Roaming checkout from an associate with a phone or tablet



33%

In store mobile notifications or messages

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# Role of the Store

More than half of online shoppers have chosen “ship-to-store” with 4 in 10 making an additional purchase while in the store.

## Ship-to-Store Behaviors



54%

of online shoppers have had items shipped to a store in the past at some point



43%

made additional purchases in store

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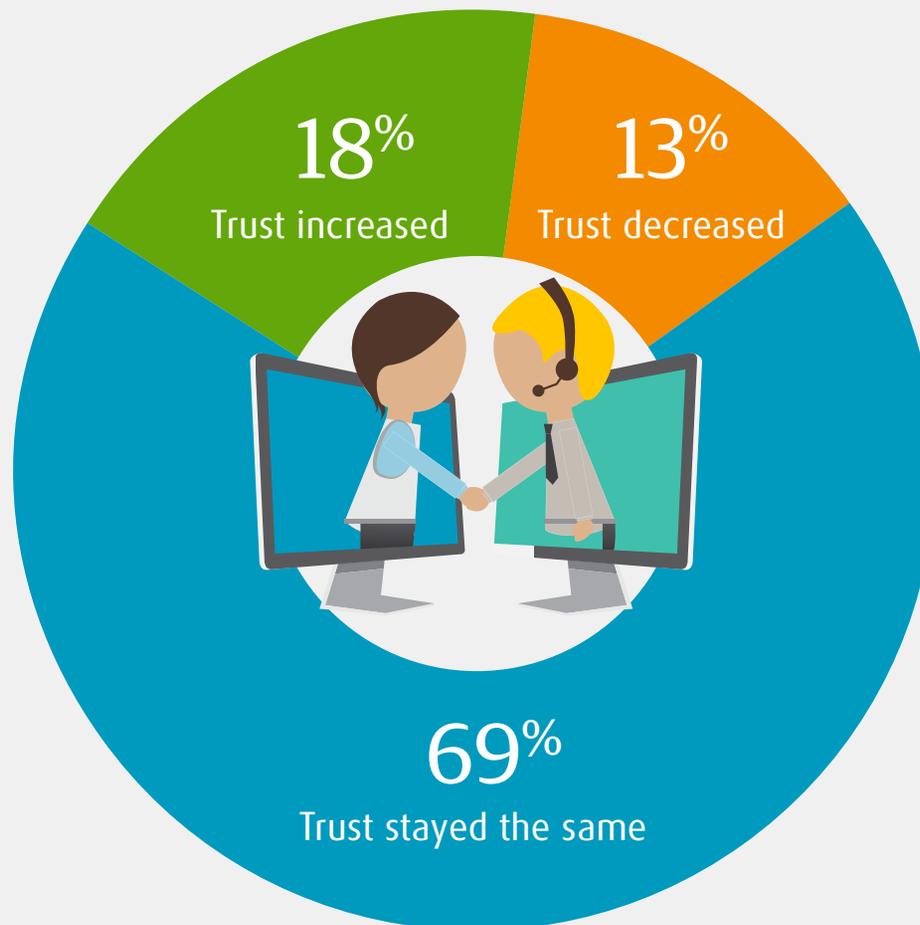
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# Security & Privacy

Despite recent security issues, more consumers have gained trust in online shopping than have lost trust in the past year.

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**Trust in Online Shopping in the Past Year**  
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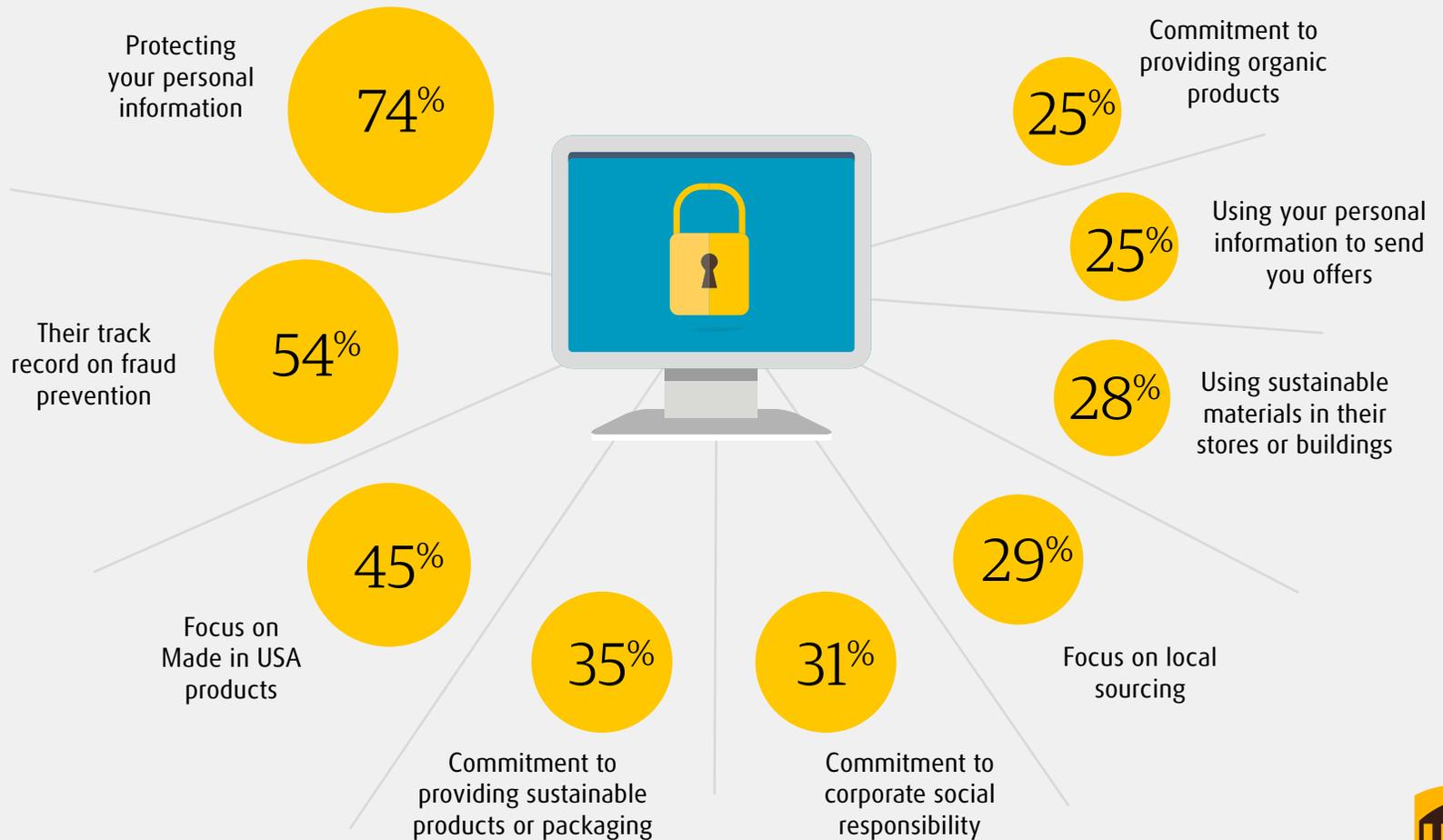
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# Security & Privacy

Privacy protection and fraud prevention are the top non-product-related influencers in consumers' likelihood to shop with a retailer.

## Influence of Values on Likelihood to Shop with a Retailer



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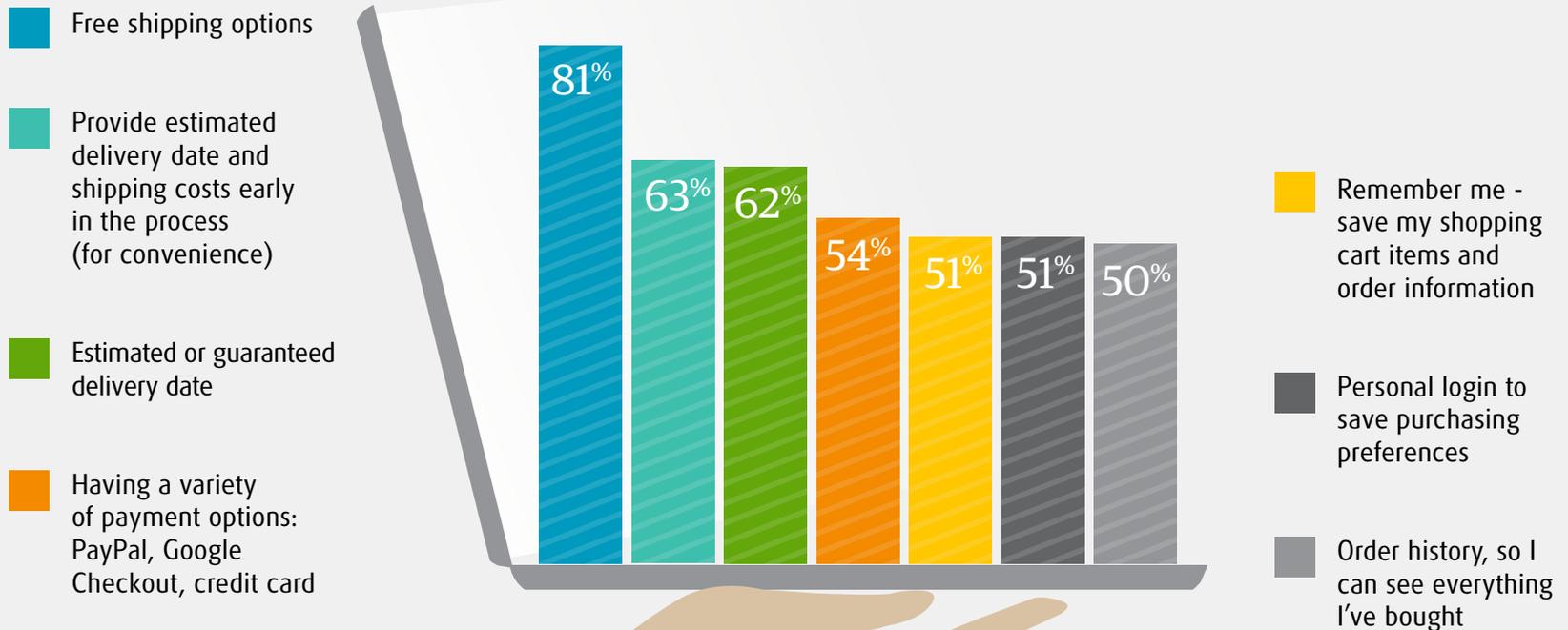
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# Checkout & Delivery

Free shipping continues to be the most preferred option when checking out online, however it is not the only valued option. Seeing the estimated delivery date and shipping costs early in the process are also important.

## Importance of Options When Checking Out Online



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# Checkout & Delivery

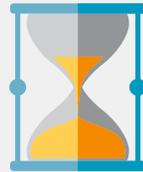
Ninety-three percent of online shoppers have taken action in order to qualify for free shipping. Among those shoppers, below are the specific actions they have taken.

## Actions Taken to Qualify For Free Shipping



58%

Add more items to a cart to qualify for free shipping



50%

Choose slowest transit time offered on a retailer's site because it's free



47%

Search online for a promo code for free shipping



35%

Choose ship-to-store



31%

Join a loyalty program to qualify for free shipping



30%

Delay making my purchase to wait for a free shipping offer



16%

Purchase an alternative product that was priced above the retailer's free shipping threshold

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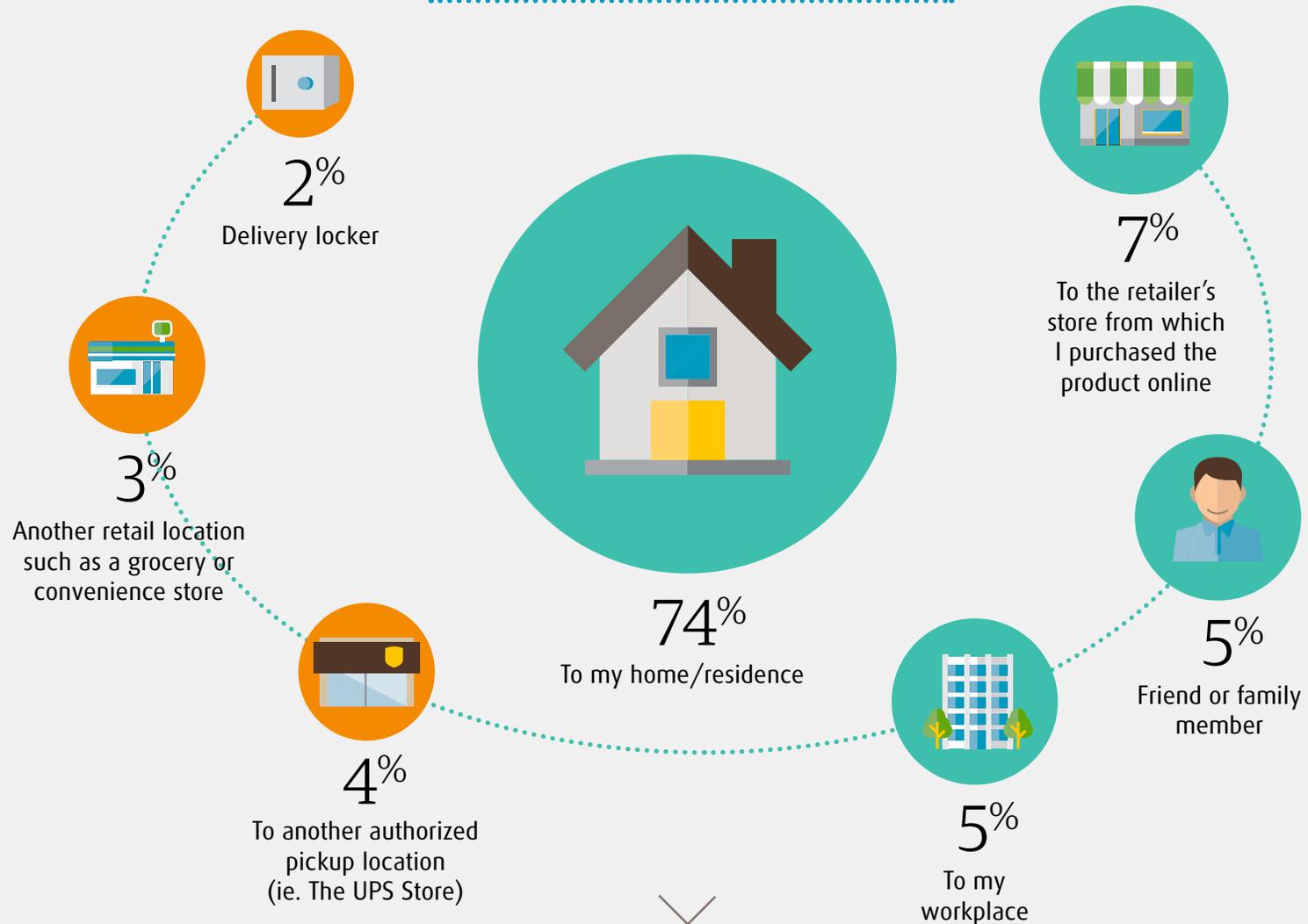
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# Checkout & Delivery

Delivery preferences are evolving. While consumers still prefer to have most of their orders delivered to their home, there is a growing trend for alternate delivery locations.

## Preference in Delivery Location



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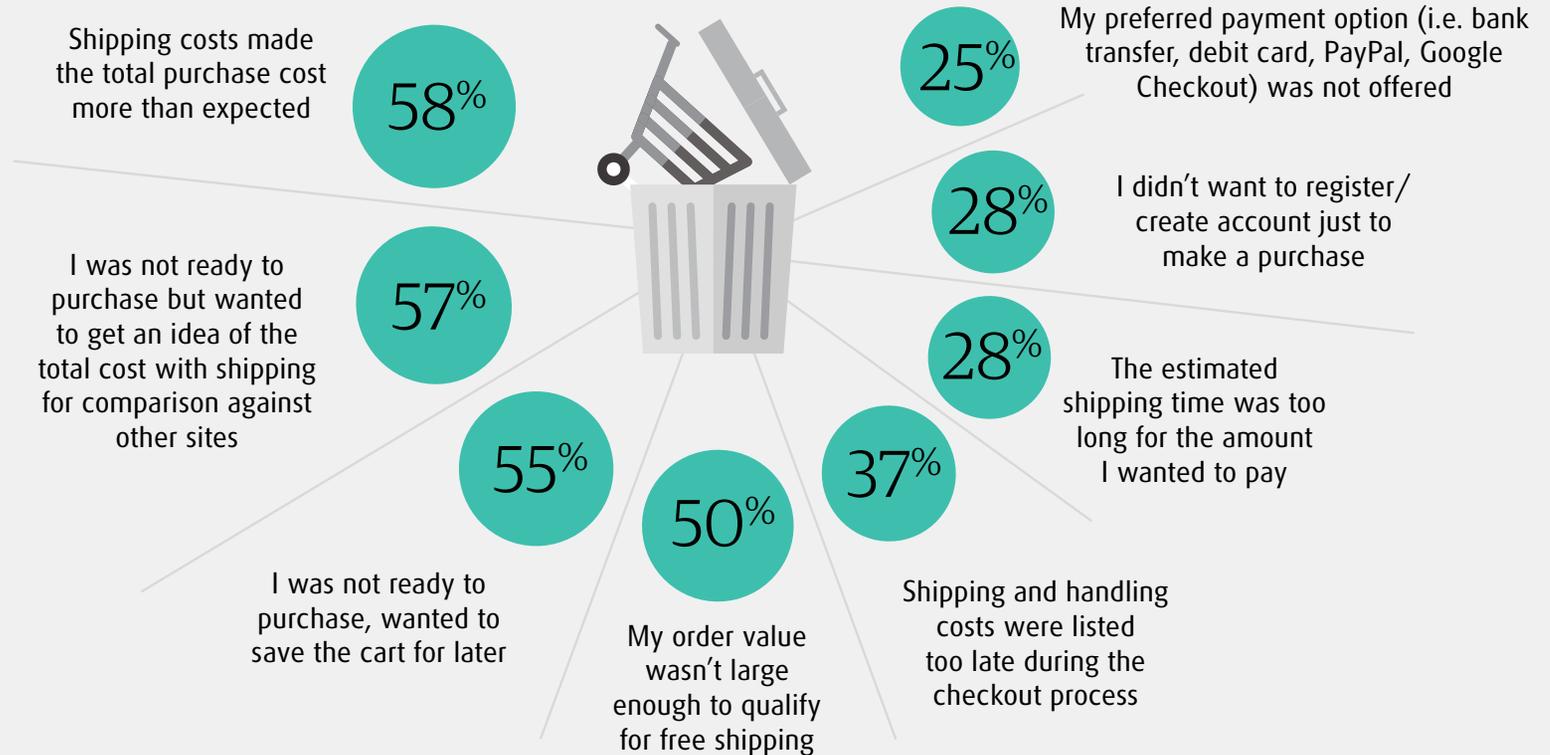
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# Checkout & Delivery

Online shoppers want to see total purchase information at checkout, including shipping costs, and the majority prefer to see the expected arrival date rather than the number of days to arrive.

## Reasons for Abandoning Shopping Cart



## Preference in Seeing the Expected Delivery Arrival Date



56%  
The expected date of arrival

vs.

24%  
The number of days to arrive (i.e. 5 business days)



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# Checkout & Delivery

Consumers are surprisingly patient and willing to wait for purchases to be delivered, and will wait even longer in exchange for free shipping.

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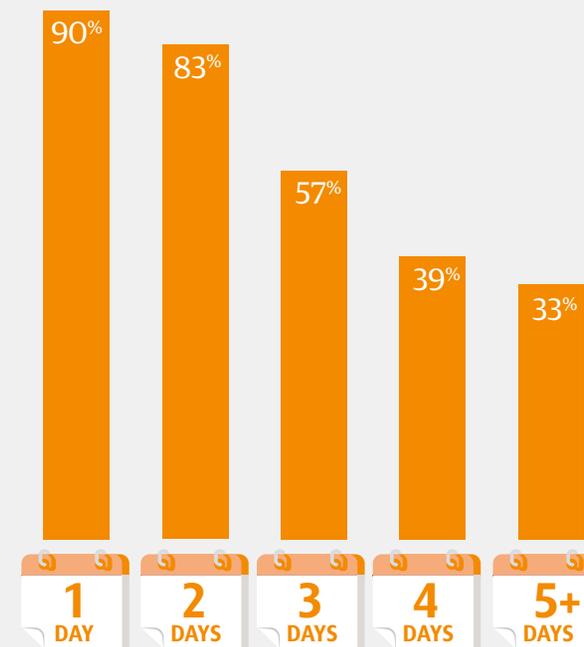
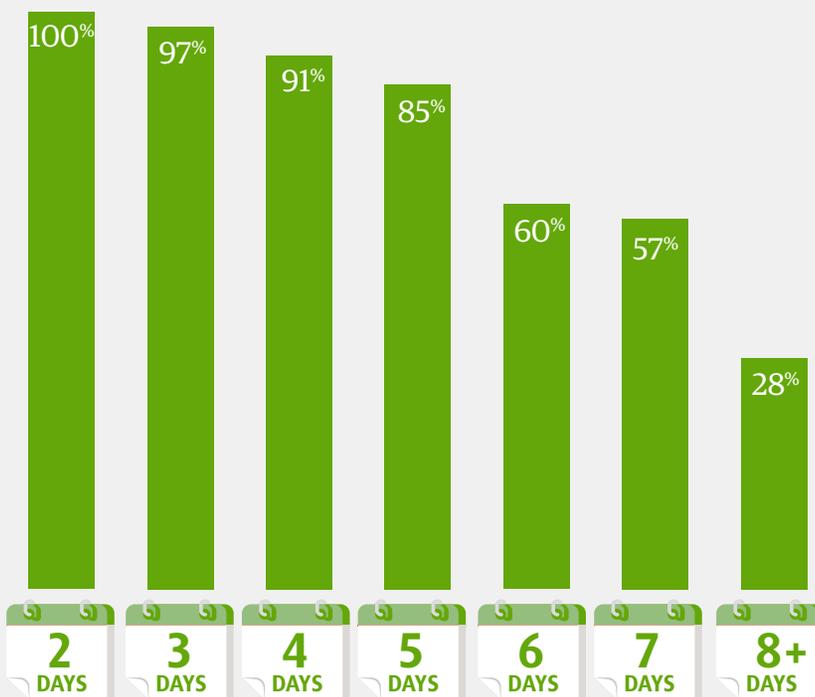
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**% of Consumers Willing to Wait by Number of Days**

**% of Consumers Willing to Wait Additional Days for Free Shipping**





# Returns

Compared to 2012, more consumers are looking at retailers' return policies before making a purchase, emphasizing the increasing role of returns in driving purchasing decisions.

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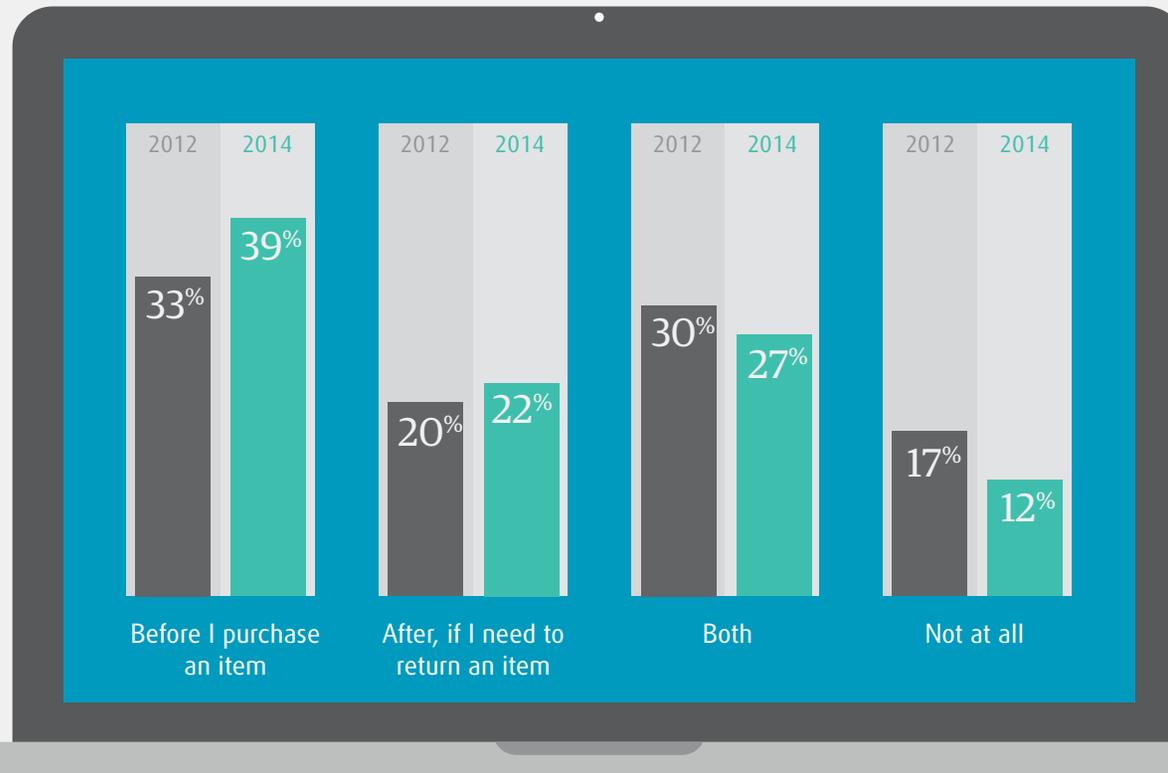
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## When Consumers Review a Retailer's Return Policy





# Returns

Returns options heavily influence consumers' likelihood to complete a sale, with restocking and shipping fees being the most impactful deterrents.

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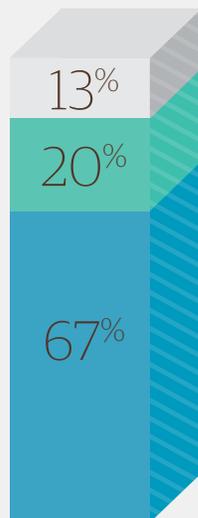
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## A Return Policy's Impact on Purchase Intent

Legend: ■ Likely to Complete Sale ■ Neutral ■ Unlikely to Complete Sale



Return in store OR ship back for free using prepaid label provided



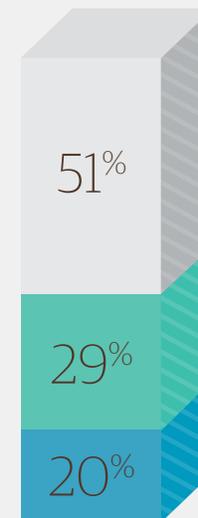
Return not accepted in store BUT ship back for free using prepaid label provided



Return in store OR buyer pays return shipping



Return in store OR ship back for free using prepaid label provided BUT there is restocking fee



Return not accepted in store AND buyer pays return shipping

