FUTURE FAST FORWARD
TRENDS AND INNOVATIONS IN E-COMMERCE

Driven to go further

majorel

THE CUSTOMER JOURNEY IN E-COMMERCE

AWARENESS

CONSIDERATION

PURCHASE

RETENTION

ADVOCACY

EXECUTIVE SUMMARY

E-commerce has evolved into an omni-present option for the distribution and purchasing of products and services in the past years. This is first and foremost the result of enormous increase in efficiency with simultaneous cost reductions compared to the brick and mortar retail business. But not all e-commerce players benefit equally. Particularly small retailers face the issue that their sales revenues stagnate while their customers' expectations keep growing: E-commerce today must be personalized, quick and seamless – otherwise customers quickly switch to the next available online shop. In other words, the customer experience must fulfil expectations, as it is one of the most important ways a retailer can differentiate itself from its competition. This white paper will give you an overview of the trends and technologies that can help to put smaller and medium-sized e-commerce providers on the map and compete with the major players.

Modern technologies help companies to fulfil customer expectations as efficiently and effectively as possible. Certain service tasks can be transferred to, for example, chatbots and intelligent virtual assistants, which are available 24/7, and allow these tasks to be performed automatically. However, in some cases, personal contact with a customer service representative will remain the preferred path for the customer. In this context, live video chats can provide scalable and still personal interactive contact. It is of utmost importance that customers can contact the company easily and without encountering any obstacles at any point on their customer journey. All steps of the customer journey must be integrated across all relevant channels to realize a holistic and smooth customer experience.

In other words: The relevance of the steps before the purchase should not be underestimated. During this pre-sales phase (awareness & consideration), it is important to anticipate trends and customer needs and to react to them. This is made possible with prescriptive and predictive analyses of customer and market data. Moreover, customers must of course be made aware of new products. In this context, e-commerce platforms become increasingly important as advertising platforms. Moreover, videos have become an integral part of the customer journey, especially in the beginning when consumers are searching for information about products or services.

Technology further supports customers in their decision-making process. Augmented Reality (AR), for example, expands the user's environment by adding digital information and enables the search, selection and purchase of a product that is optimally adjusted to the customer's current situation. AR exemplifies how the offline and online worlds increasingly converge and connect.

It is not expected that offline shopping will completely disappear any time soon. On the contrary, e-commerce retailers are increasingly trying to get customers into physical contact with their brands through temporary or permanent offline shops and to provide them with a holistic shopping experience. As a result, consumers can choose from multiple channels and options for both their purchase and payment. In this pre-sales phase, Internet of Things-based devices and processes that accelerate and simplify the decision-making process are becoming increasingly relevant. For example, smart shelves notify the customer on their smartphone about relevant offers nearby, whereas beacons (digital transmitters) may trigger automatic payments when the customer leaves a shop.

Once customers have decided on a product, the next step is to excel in the delivery of a product. In this phase of the customer journey, companies can stand out by offering exceptionally quick, efficient and customer-friendly delivery. Technologies, such as machine learning and process automation, will help to optimize the delivery and redesign the path to the customer.

Finally, companies face the challenge to retain the customers' loyalty and to increase the value of their shopping cart. This requires a comprehensive customer experience management that builds on technologies such as artificial intelligence and analytics to achieve personalized, efficient and effective service, resulting in the best possible customer experience.

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E-COMMERCE EVERYWHERE: THE OMNIPRESENCE OF E-COMMERCE IN ALL SPHERES OF LIFE

Since the first attempts to sell goods through the internet in the 1990s, the market has undergone a disruptive change. When Amazon and eBay were established in 1995, trading platforms with millions of products, which could be delivered immediately after they were ordered, were inconceivable. Meanwhile, these aspects have become the new 'normal'. E-commerce has become an omnipresent aspect of economic activity and consumers encounter it in nearly every area of their daily life. Today, the purchase of electronic devices, fashion, books or travel is unimaginable without e-commerce.

And even areas that have previously been characterized by offline transactions, such as food retail, health care and banking, are increasingly traded online. Even the online purchase of luxury brands is expected to increase to 25 percent by 2025. The reasons for this development are obvious. A comparable increase in efficiency with a simultaneous reduction in costs cannot be achieved by offline retail alone. Consequently, e-commerce growth and the dynamic market development will not decelerate any time soon.

Driven by the dynamic development of the market, the definition of e-commerce has also changed. While traditionally e-commerce only referred to electronic online retailing, the term now also includes the initiation, negotiation, conclusion and execution of retail trading transactions across the entire internet and other networks. In this respect, e-commerce

supplements or replaces in part or in full the traditional steps of a transaction to carry it out faster, at lower cost and with more ease.[2]

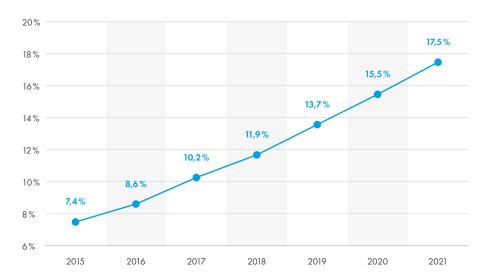### Continuous growth – but not all players benefit equally

Real and projected e-commerce growth indicate that these benefits are widely recognized. In 2015, electronic retail made up just 7.4 percent of the global retail trade volume, but by 2021 it is projected to reach 17.5 percent. Approximately 22 percent of this represents cross-border e-commerce. One e-commerce player connects many nations in particular: worldwide, Amazon is the most widely known and most established e-commerce platform. The company has reached an online population of 1.2 billion consumers, closely followed by the Chinese platform Alibaba that reaches 1.07 billion people in 15 markets. In Germany, Amazon has also grown to be the most popular e-commerce

trading platform. However, German consumers are committed online shoppers beyond Amazon. Almost a quarter of the population primarily shops on the internet, and more than half partially shops online. Only six per cent of consumers exclusively shop in brick-and-mortar stores.

However, there are considerable differences regarding which product categories are mostly frequently purchased online. For example, clothing, electronics, media, toys and leisure products account for the highest share of e-commerce revenue. In these categories, it is also Amazon, whogenerates the highest revenue: the e-commerce giant accounts for 90 percent of revenue from electronics, media and leisure products. In total, the Amazon market place generates around 25 percent of the overall online revenues, whereas the proprietary trading business generates 21 percent of overall online revenues.

E-commerce share of total global retail sales from 2015 to 2021.
Source: Medium, 2018

This poses a major challenge for retailers with smaller online shops because just three of the 100 largest and most successful online shops record 43 percent of revenues, although the e-commerce share in total retail revenue has grown. This imbalance also bears witness to the fact that consumer loyalty for large e-commerce providers is often stronger than for smaller ones. The result is that revenues via proprietary online platforms often stagnate for smaller retailers. This often leads to parallel strategies: 35 percent of the 1,000 online shops with the highest revenue also sell their products on eBay. 43 percent do the same on Amazon.

CUSTOMER JOURNEY- OVERARCHING TRENDS

In the future, success in e-commerce will be increasingly determined by how customer-oriented a company is. A customer-centric orientation means that the customer journey steps – the initiation (awareness), negotiation (consideration), conclusion and execution of retail translations (purchase) all the way to the post-purchase phase (retention and advocacy) – across all relevant channels – must be integrated and aligned with individual customer needs. Only this way it is possible to realize a holistic and smooth customer experience. Since the customer experience is one of the most important means of differentiation, it is highly critical to fulfil customers' expectations during their entire journey.

The bar is set high: Companies must fulfil growing customer expectations during the customer journey

In addition to the challenges related to internal processes, this means that customers who are always online, fully informed and therefore very demanding, need to be satisfied. For example, customers expect both individualized communication, that takes their relevant history along their entire customer journey into account, as well as individual offers at individual prices.

And although, due to the multitude of channels and devices, customers can resolve most of their issues on their own, in some cases they prefer the direct and personal exchange with a company representative. At the same time, however, they often perceive that same direct contact as inefficient. To address this issue, certain process steps in customer services are automated more and more often, for example by transferring certain tasks to intelligent virtual customer assistants (chatbots and voice assistants).

Additionally, offers, such as curated shopping and subscription-generated shopping services, try to combine the efficiency of automated e-commerce processes with personal consultations and use the advantages of both elements. The customer appreciates the more or less individualized pre-selection by paying premium prices. The benefit that retailers realize by offering customers a curated selection may result in a competitive advantage – provided the human component does not lead to disproportionately high costs.

Regardless of whether a personal or automated interaction with customer service is offered, it is important that customers can contact the company smoothly and seamlessly throughout their customer journey. Easy accessibility regarding channel selection and the availability of company representatives is among the top three factors that have a major impact on customer satisfaction[5].

Chatbots, voice assistants or live-video chats: New channels increase customer engagement

Virtual assistants, such as voice assistants or chatbots, are unparalleled in terms of availability as they can always be reached exactly where the customers also spend their time: on a smartphone. Some retailers have already used this to their advantage by focusing exclusively on the distribution through conversational commerce channels such as WhatsApp, Facebook Messenger or WeChat. For example, Threads - a UK fashion shop - offers the luxury brands in its product line exclusively via messenger services. This concept appears to be well-accepted thanks to the direct and personal contact between the shop's designers or consultants and the customers, resulting in significantly higher shopping cart values than usual.

In addition, live-video chats, which are projected to see a growth of 87% in 2019, enable scalable and still personal and interactive communication between consumers and company representatives. The L'Oréal beauty brand NYX already uses this chat type and provides consultations to its customers using Augmented Reality and face recognition technology in real time. Beauty experts are available via chat for beauty consultation appointments by smartphone, regardless of location, thus enabling highly individualized assistance. The online shop, where the showcased products can be ordered is directly integrated in the app.

**The clock is ticking Waiting times?
No, thank you!**

The smooth and barrier-free interaction expected by customers goes hand in hand with an ever-decreasing tolerance for waiting times. One consequence is, for example, the high dropout rate for websites that load too slowly. If a website is not available within three seconds, many customers will leave the page. For online retailers, this can have very negative consequences since customers may move on to the competition. In the same vein, waiting times for deliveries are viewed increasingly more critical. As a result of delivery models such as Amazon Prime, delivery times of more than four days are no longer acceptable for many customers. Alternative approaches, such as delivery by courier based on geo-localization as tested by Zalando in collaboration with Parcify, are very popular with customers thanks to their high flexibility. As soon as the customers have downloaded the app and entered the order information, the bicycle couriers' tracking tool will show the customer's location on their smartphone and they can deliver the goods to exactly this location. Options like these accelerate the increasing perception of imme-

diate availability and give rise to anticipative services. This development will have a long-term impact on future e-commerce and may result in the willingness to pay a little more for same-day delivery to specific locations.[6]

**TRENDS ALONG THE
CUSTOMER JOURNEY**

Phase 1: Awareness - Entertain me! Draw attention with entertaining and targeted approaches

Many companies underestimate the relevance of the phases and steps that consumers need to go through before they purchase. In order to be noticed and considered by consumers, it is important to establish an agile digital marketing approach that anticipates and responds to trends and changing customer needs during this pre-sales phase. Furthermore, the optimization of paid as well as organic searches and the prescriptive and

predictive analysis of customers and market data are promising activities in preparation of the purchase. Companies that master these activities are able to convince new customers in 40 to 50 percent of the cases – much higher than the average ratio. At the same time, 80 to 90 percent of existing customers return to a company that puts a specific emphasis on the pre-sales phase.

More precisely, it can be assumed that online advertising, as one of the main options to draw the consumers' attention to one's own products, will go through yet another change. In the future, Google and Facebook, as the current dominating marketing platforms, will have to share the market with e-commerce players such as Amazon, Alibaba or Tencent. But even smaller e-commerce retailers may discover online marketing as additional source of income and data. Already, many consumers start their search for a product on Amazon by reading product descriptions and reviews. Generally, about a quarter of

Amazon or Alibaba, for some time now, also utilizes visual input: Instead of searching for a product by entering text, the consumer uploads an image and searches for a product that is visually as similar as possible. Once it is found, he or she can directly place the product in the online shopping cart. With increasingly better performance of artificial intelligence-based technology, the image search will likely experience another upward trend as the search becomes even more precise. In addition, partnerships between social media platforms, such as Snapchat, Instagram or Pinterest, and e-commerce market places that harness the image search for their benefit offer great potential as the users of these platforms are already oriented towards online shopping. For instance, Pinterest's "shop the look" has 250 million monthly users. In cooperation with Amazon, Snapchat has recently developed a feature that allows searching for products on Amazon via image search and purchasing them there.

Furthermore, the active use of voice assistants, such as Amazon's Alexa, Google Assistant or Apple's Siri, during product search is also not likely to abate any time soon. Worldwide, an average of 130 million questions are posed on Alexa devices every day. This is most certainly the result of the speed and ease of entering the search request, which is superior to all the other search alternatives. Thanks to continuously improving speech recognition and processing, the error rate of smart assistants will continue to decrease – and with it the frustration of users resulting from misunderstood speech entries. But the search by voice also changes the presentation of results: The entry is not followed by an endless list of products or information, frequently there is only one answer. To ensure that this answer is valuable and relevant for the customer, the content needs to be rigorously optimized.

all consumers buy a product right where the online search started. Hence, it seems logical that the e-commerce giant also assumes the commercial advertising for these products. At currently 0.8 percent, advertising expenditures are still comparatively low on the e-commerce platforms. However, this share is expected to increase to 18 percent by 2027, which will generate additional revenues for e-commerce platforms.

In addition to display advertising on e-commerce pages, video marketing will become increasingly more relevant to generate awareness for products among existing and new customers. Mobile videos are already

part of the content that consumers pay most attention to. Particularly popular are short advertising clips, so-called "snack ads", and 360-degree and personalized videos.

Moreover, besides advertising videos streamed by companies, video has also grown in importance in the active search performed by the customer and has thus added yet another contact points to the customer journey. YouTube, for instance, is one of the most important search engines and has a multitude of user- and company-generated videos on products and their use. The image search, which has been used by large e-commerce players, such as eBay,

Phase 2: Consideration - more information please! Technologies supporting the decision-making process

In order for a customer to consider an e-commerce retailer or a product that this retailer sells, all activities connected to the search must be seen as part of the customer journey and be seamlessly integrated. Surprisingly, unsuccessful search is one of the main reasons why consumers abandon a purchase: It is therefore not surprising that in a study conducted by Episerver in an e-commerce context, 58 percent of all participants indicated that a user-friendly search function was the most important feature of an online shop. It is thus essential that the search – regardless of the device or channel used for it – quickly and precisely leads to results.

In this step of the customer journey, the use of chatbots in their various forms can be particularly helpful. For example, as simple FAQ bots, they can answer the most commonly occurring customer requests. As script bots or NLU (natural language understanding) bots, they can give advice regarding less complex topics and initiate processes, such as making an appointment. Particularly in a retail context, it is easy to find a variety of applications for chatbots. Therefore, it's projected

that more than 70 percent of all chatbots will be used for retail-focused activities and processes by 2023. Using chatbots, it may be possible to fulfil the expectations regarding a personalized and efficient service that is able to provide meaningful input into the decision-making for a product, a service or a company.
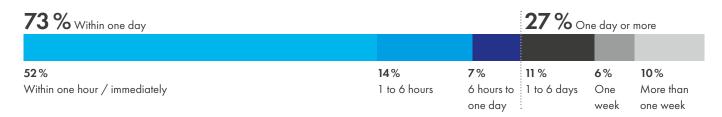
Augmented Reality (AR) is another technology that also adjusts to the customer's respective context and is therefore able to significantly simplify the decision-making process. Augmented reality enables a search, selection and shopping process that is adjusted to the customer's environment. While virtual reality still lacks content and mass market-capable devices, the implementation of AR is significantly easier as the customer does not require an additional device. Here, only the physical environment-related digital information mapped via the camera is placed onto the screen of the smartphone or tablet to, for example, visualize virtual furniture in an existing room (e.g. at Ikea or Bolia). Another example is the cosmetics chain Sephora: With its AR-based Virtual Artist App, consumers can virtually test make-up products.

In the future, electronic word of mouth (eWOM), i.e. the reviews and experience reports of other consumers, will also play an

important role in the decision-making process both on the web pages of e-commerce retailers or via social media platforms. Here, customers will search and find both inspiration as well as information.[8]

Despite a multitude of information sources, it may still take a long time for customers to make their final decision to purchase. Moreover, it can be a challenge to convince and motivate customers to decide for a product or a brand starting from first contact all the way to the purchase. A study commissioned by SAP, which looked at the online shopping behavior of 20,000 consumers in 24 countries, found that German customers leave their online shopping cart untouched for a long time before deciding on a purchase. The selected products often remain in the shopping cart for up to 24 hours and even then, the purchase is ultimately often abandoned. Combined with a user interface that is not well-designed or the necessity to create an account, the abandonment rate increases even more. A user-friendly shopping cart, live chats, mailings or discount actions are examples how to prolong the customer journey one step further and ultimately animate the customer to make the purchase after all.

How long does the product remain in the shopping cart until the decision is made whether to click on "Buy"?

73 % Within one day   **27 %** One day or more

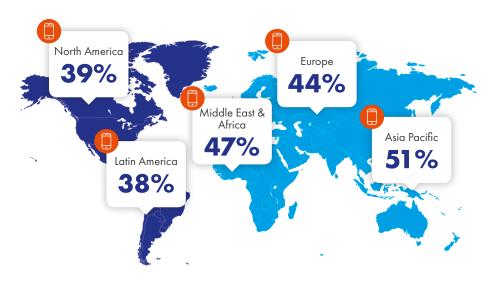| 52 % Within one hour / immediately | 14 % 1 to 6 hours | 7 % 6 hours to one day | 11 % 1 to 6 days | 6 % One week | 10 % More than one week |

Source: W&V, 2018

Phase 3: Purchase - a bit of shopping here and there: Customer experience during the purchase process of the future

The purchase phase in the customer journey clearly shows how closely the online and offline worlds will be linked together in future. E-commerce retailers increasingly try to get their customers to physically experience their brands and product line via temporary pop-up shops or permanent brick and mortar stores. They aim to create a holistic, more interactive and unique shopping experience to differentiate themselves from their competition. Examples for this are AmazonGo, Alibaba's Hema or Home24, which initially only sold their products online. Another example for the link between digital and physical world are Google Local Inventory Ads, where a product search on a smartphone shows ads from local retailers and includes information on whether the product is available from a specific retailer. These developments also take into consideration that many customers still like to shop directly at a real store. More precisely, a study conducted by the German Trade Association (Handelsverband Deutschland) found that three quarters of all German consumers still like to shop offline every once in a while.

In the future, the purchase phase will be characterized by a multitude of payment options and channels through which purchases can be transacted. In this phase particularly, Internet of Things-based devices and processes will be of relevance since they can significantly accelerate and simplify the purchase. This includes, for example, intelligent shelves or so-called beacons, meaning transmitters that send Bluetooth signals in the form of push messages to consumers' smartphones. Beacons enable the targeted and context-specific transmission of digital information, on the

Mobile Marches On.
In APAC, Mobile now accounts for the majority of transactions.

North America
39%

Latin America
38%

Middle East & Africa
47%

Europe
44%

Asia Pacific
51%

one hand, and are able to trigger digital payment processes when a customer leaves the store, on the other. Using beacons also enables direct ordering of products online that are sold out or that the customer tried on in an offline store. While this technology was declared dead just a few years ago, it is now experiencing another comeback. Also part of the Internet of Things ecosystem are the voice assistants that were already mentioned in previous customer journey phases. They also have the potential to optimize the future purchasing process. For instance, it will be possible to transact purchases with voice commands or users can use voice biometrics to authenticate a purchase transaction.

Mobile commerce is closely connected with the shopping activities along the customer journey, and this trend will most likely not disappear. On the contrary, it is expected to grow with the expansion of technical possibil-

ities. The share of online transactions carried out via mobile devices, which is currently at an average of 44 percent in Europe, is expected to grow to approximately 60 percent –which is already a reality in Sweden.

In addition, mobile and social commerce, meaning shopping via social networks, will influence each other and continue to rise in importance. It is projected that social commerce, with growth rates of 25 percent, will soon be one quarter of the entire e-commerce market. However, not only the purchase transaction, but also the communication about it, is carried out via social networks and is thus a means for orientation and information regarding a product for other users.
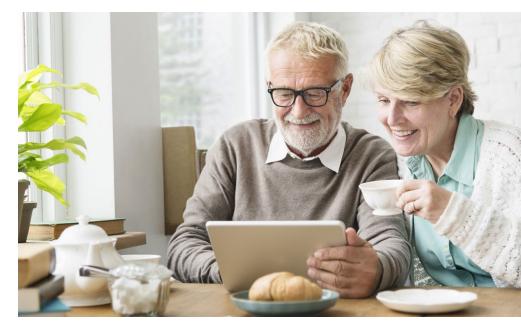
Phase 4: Retention - after the purchase is before a purchase

Delivery at lightning speed: Efficiency and flexibility will characterize future delivery processes

An important aspect of the after-sales phase is to make it through the so-called last mile and to deliver the ordered product to the desired location at the right time. All related activities will develop dynamically in the future and have the potential to generate a major competitive edge. By using machine learning or process automation, for example, it is possible to achieve an even more efficient and customer-friendly delivery.

Customer-friendliness in relation to deliveries refers to speed and accuracy in terms of fulfilling the customers' exact requirements. This is, for example, the case if delivery occurs on the same or the next day, which many online retailers such as Amazon, DocMorris or Tesco already offer. In London, Aldi now offers delivery within two hours. By 2023, 78 percent of all logistics companies that participated in a representative survey conducted by Zebra Technologies expect same-day delivery to be the norm. 40 percent expect that by 2028 deliveries within two hours will be the standard. However, in order to realize these very short delivery times, it will be necessary to collaborate with crowdsourcing providers that have flexible access to freelance couriers.

The "click & collect" model, in which products are purchased online, but can be picked up at the store, will also gain in relevance as it provides the customers with lower shipping costs and more flexibility.

The same benefits may be achieved by using innovative delivery technologies, such as drones. In Iceland, for example, the most successful Icelandic e-commerce shop, aha.is, delivers by drone. The overall 15 drones manage 30 deliveries with up to three kilogram in weight per day. The customer receives a text message when they arrive at their destination. After confirming their availability, the merchandise is lowered to the ground using a wire. In Finland and Australia, Alphabet, Amazon and UPS are testing similar models.

Customer retention through holistic, technology based customer experience management

In the future as well, it will not be an easy task to establish customer loyalty and increase the profitability of individual customers. Generally, it can be assumed that customers will continue to be ready to switch quickly, which makes customer retention measures even more relevant. First and foremost, it will be important to optimize the core product and the

related customer experience. To achieve this, it becomes ever more critical that all data that can be derived from the touchpoints during the customer journey are analyzed and managed using technologies, such as artificial intelligence. In this respect, speech and text processing and analysis, big data analytics or interface management will be applied. In addition to processing customer data and the customers' interaction history with a company, the analysis of customer emotions and perceptions will become increasingly more relevant to enable the best possible customer experience. All this clearly shows how complex holistic customer experience management can be.

Moreover, anticipative customer service and support across multiple channels will become increasingly more important in order to retain customers. It will become more technology-supported and -based, which enables a higher degree of personalization, efficiency and effectivity.

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Phase 5: Advocacy - E-commerce professionalizes word of mouth

Because the reviews of other customers represent a highly relevant and much used source of information, e-commerce retailers will keep trying to understand the mechanism behind those reviews in order to control and use them directly to their benefit. Based on the data and findings from customer experience management, it will become easier to find suitable brand ambassadors and assign them directly to various communities.

However, this will only work if customers have experienced an overall positive customer journey and show high engagement in relation to a brand or a specific product. Only in these cases, they may be positive ambassadors for a company.

In summary, we can conclude that the developments in e-commerce and beyond hold enormous potential for designing the customer journey to be even more efficient and effective in order to address customer demands more adequately. At the same time, the implementation of a seamless and smooth customer journey requires the comprehensive integration and a holistic management of the many channels, technologies and media. We look forward to assisting you as an experienced partner if you wish to successfully address these challenges. Learn more about our future-oriented solutions in the next section.

REDEFINE THE CUSTOMER JOURNEY IN E-COMMERCE WITH MAJOREL

Our unique experience of the e-commerce landscape means that we are ideally placed to support you at every stage of your journey.

Consulting

Let us provide you with holistic advice concerning customer experience by allowing our consulting team help you analyze or optimize the customer journeys that are relevant for you or develop future-proof omni-channel strategies. We are also available to assist you with our consulting solutions concerning technologies in terms of automation and artificial intelligence for agile digitalization and optimization of customer interactions or customer service processes.

CRM Analytics

Our CRM Analytics solutions will help you analyze and utilize the multitude of data that accompany the new channels in the customer journey. Our Analytics platform supports customer service through the real-time generation of new insights and specific recommendations for action by anticipating current and future customer behavior. As a result, you will be able to offer your customers a positive customer experience and increase your profitability.

Chatbots and voice assistants

Thanks to the ease of use, speed and immediate access to information, chatbots and voice assistants will continue to simplify the daily life of many consumers. Whether FAQ chatbot or complex interaction scenarios via chat or voice assistant – we provide comprehensive consultations regarding the use of smart assistants and help with their implementation and the operation of your conversational interfaces.

Content moderation

The volume of content that is generated by companies and consumers via social media or on product review pages is likely to increase even more in the future. It is essential to manage this content to make these contact points customer-friendly and provide consumers with an overall positive experience. We help you both strategically as well as operationally to harness the potential inherent in social media and at the same time minimize related risks.

Personalized videos

Videos will stay relevant in future years as both an information and entertainment medium. Utilize this development and compel your customers by creating personalized and entertaining video content.

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