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Report: 2014 Christmas Shopping in Europe

Perform or Perish! Digital Shopping on Track
to Unseat In-Store Shopping



42%
plan to do most
shopping digitally



58%
use mobile while
shopping in store



35%
will abandon
site when slow



60%
will digitally purchase
items they have first
seen in physical shop

RETAILERS THAT IGNORE MOBILE AND WEB PERFORMANCE DO SO AT THEIR OWN PERIL

The surge in digital shopping for Christmas will reach the force of a tsunami this year, making the performance of retailers' websites and mobile applications vital to bottom line success. Dynatrace's European annual research into the shopping plans of smartphone and tablet owners revealed new information that shows retailers are at a tipping point: PERFORM for web and mobile users, or PERISH at the hands of competitors. Mobile shopping on the run up to Christmas will shatter prior levels, according to findings of an online survey conducted with more than 4,548 adults owning smartphones and/or tablets by TNS (UK), Toluna (Germany) and Opinea (France) on behalf of Dynatrace. The survey indicates in particular that mobile usage is high, especially while in-store. This new research underscores how crucial it is for retailers to invest in and focus on web and mobile performance to lead in a hypercompetitive landscape with quickly evolving customer behaviors.

DIGITAL SHOPPING THE NEW NORMAL, MOBILE BECOMING MANDATORY

Pureplay in store shoppers are extinguishing, replaced by on-line crowds reshaping how retailers must adapt to succeed this holiday season. Only a minority of 24% of surveyed Europeans plan to do their Christmas shopping predominantly at traditional brick-and-mortar stores. 42% of survey participants plan to focus their shopping efforts on digital channels (web or mobile web) and 33% plan to apply a mix of all. These findings further outline the importance of Web and mobile app performance; unless retailers can handle the digital shopping onslaught, they will be left with empty shopping carts and dismal sales this year.

PATIENCE FOR POOR PERFORMANCE IS FADING

Consumers Will Abandon and Move to Competitors

Patience shown in the past is disappearing, as a significant portion of digital Christmas shoppers (36% in the UK, 20% in Germany and a strong 46% in France) will go elsewhere if a website or mobile app prevent them from interacting in three seconds or less. A recent similar survey of over 2,000 US mobile owners revealed even stronger figures (46%), only matched by France. The stakes couldn't be higher; retailers who don't deliver fast will lose customers and sales.

MOBILE CHANGING IN-STORE SHOPPING FOREVER

Omni-Channel Reaching New Levels

Traditional shopping is gone. No longer do consumers head to stores to see what deals or gift ideas they will trip over – their journey begins online long before driving to the brick-and-mortar stores. While in store, delivered mobile experience is critical since a majority (UK 56%, DE 57%, FR 67%) will compare prices, read product reviews and download coupons. And back home another 60% of surveyed Europeans would be likely to purchase later on through a digital channel what they have first seen in a physical shop (UK 61%, Germany 60%, France 59%).



61%
of French air their
frustrations on Social Media



Only
16%
of Germans plan to shop
mostly in brick-and-mortar stores

SHOPPER FRUSTRATION WILL BE BROADCAST

Using social media and mobile app stores to complain about poor online shopping experiences is becoming the norm. While the French consumers are leading the way with 61 percent likely to air their frustrations, other geographies also display high figures too (UK 37%, Germany 33%). Collateral damage to brand reputations is raising to new levels.

THE BOTTOM LINE: THE ON-LINE SHOPPING PERFORMANCE WARS ARE UPON US

The Dynatrace survey reaffirms the transformation mobile is bringing to the retail world, as well as what is at stake for retailers – including abandoned transactions, loss of sales to competitors, complaints across social media that will damage brand reputations, and the influence mobile has on in-store shopping. Retailers who don't prepare for the shopping storm do so at their own peril.

SURVEY METHODOLOGY

This survey was conducted online simultaneously in the United Kingdom, Germany and France in November 2014. The UK research was run by TNS, surveying 2,470 smartphone owners. The German research run by Toluna surveyed 1,000 smartphone/tablet owners, and the French survey run by Opinea included 1,028 adult participants with access to the mobile internet. A similar survey run within the United States by Harris Poll on behalf of Dynatrace from October 8-10, 2014 among 2,060 (of whom 1,353 are smartphone/tablet owners) and October 14-16, 2013 among 2,025 (of whom 1,191 are smartphone/tablet owners) U.S. adults and adults ages 18 and older. This online survey is not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated.

FOR MORE INFORMATION

on how Application Performance Management can make the difference between robust sales or empty shopping carts, visit:
www.dynatrace.com

Learn more at dynatrace.com

Dynatrace is the innovator behind the new generation of Application Performance Management. Our passion: helping customers, large and small, see their applications and digital channels through the lens of end users. Over 5,800 organizations use these insights to master complexity, gain operational agility, and grow revenue by delivering amazing user experiences.