Consumers Tell All

Part 3: Shopping Cart Use & Expectations

Bronto

Mobile devices have enabled consumers to shop when and where they wish, and a better deal is often just a few clicks, or a few taps, away. To be successful, today's marketers must cater to the evolving consumer demands for convenience and connection. Seamless shopping between sites and stores is no longer just a marketer's dream, it's a consumer's expectation.

Consumers are not simply window shopping in your stores or casually browsing your product pages. They are using multiple devices to extend their shopping experience and influence purchase decisions. They have obliterated the linear path to purchase and created their own customer lifecycle dotted with multiple shopping sessions that vary in location, channel and device.

Simply put, consumers are in control of the e-commerce landscape.

Bronto went straight to the source and asked online shoppers to reveal how they shop, confess what annoys them and divulge what can make them want to buy. The results of this study are available in Bronto's 3-part *Consumers Tell All* series.

Part 1: Online Shopping Frequency
Part 2: Device of Choice for Online Shoppers & Buyers
Part 3: Shopping Cart Use & Expectations

Bronto Software partnered with Ipsos to survey online shoppers about their online shopping habits, mobile device preferences and interactions with online shopping carts, cart abandonment and post-abandonment reminder messages. The study was conducted in January 2015 and consisted of 1,012 consumers in the United States who bought online within the past 12 months. Respondents who had not made a purchase online were excluded from the study and are not included in the sample size or resulting analysis.

Introduction to Part 3

In the early days of e-commerce, buying online was a new, often scary, concept for consumers. Online security concerns, order total reveals late in the checkout process, and massive shipping costs caused many consumers to leave their items in the shopping cart with no plans to return. But consumer behavior has evolved rapidly. Their use of the shopping cart has changed and retailers need to change with them.

Online shopping is now a common way to buy goods. Today's savvy, connected shoppers don't share the concerns of the early online shoppers. And they expect retailers to provide seamless transitions between sites and stores and across a variety of devices. The shopping cart is central to this multi-device, cross-channel way of shopping.

For Part 3 of Bronto's *Consumers Tell All* series, online shoppers were asked how they use shopping carts and what they expect to happen when they leave items behind. While some consumers still abandon shopping carts with no plans to return, the results of the study show that the shopping cart has become a tool shoppers use to learn more about items prior to purchase, transition between devices and channels, and eventually complete orders.

The findings from the study are organized into the following sections:

1. Shopping Cart Use

2. Shopping Cart Reminders

To better understand how shopping carts are used, not just abandoned, online shoppers were asked if they leave items in the cart with the intention of revisiting them at a later time. Knowing more about their intentions can help retailers optimize shopping cart features and the checkout process, while also shaping the tone, timing and content of cart reminder messages.

Let's first look at how online shoppers regard the cart from a higher level. These consumers were asked if they use the shopping cart to store items with the intent of buying later. Retailers holding on to the traditional concept of shopping cart abandonment may assume that purchase intent flatlines when items are abandoned in the cart, but consumers have a different story to tell.

Using the Shopping Cart for Storage
Do you use the shopping cart to save items to buy later?

A majority of online shoppers, 73%, use the shopping cart to store items to buy later. This shows that for most online shoppers, some level of purchase intent remains when items are left in the cart. Eighteen percent of online shoppers plan to revisit items left in shopping cart every time they shop, revealing that for many, this is fundamental part of shopping online.

These findings should prompt retailers to review shopping carts and reminder emails to see if tone, content and timing speak to true abandoners or to the 73% of shoppers who plan to revisit their carts.
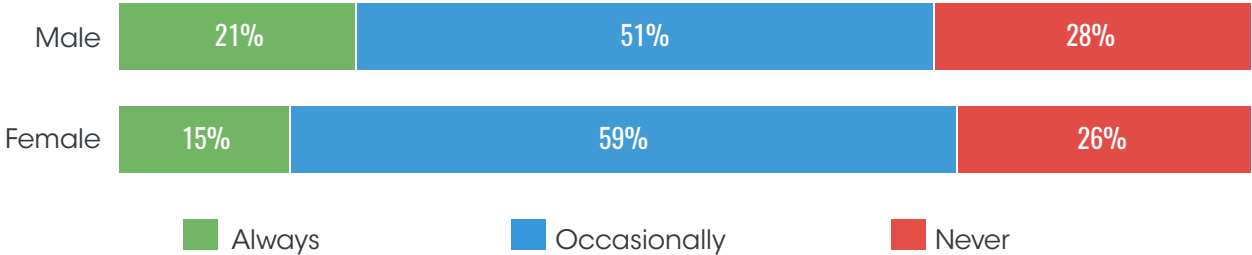
Items Saved in Cart to Buy Later - All Online Shoppers

18%	55%	27%

■ Always　　■ Occasionally　　■ Never
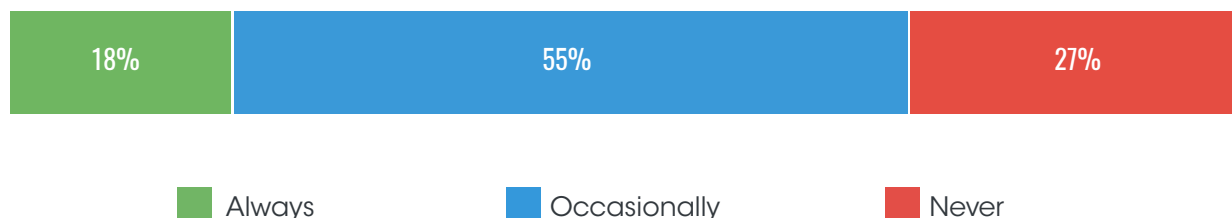
Shopping Cart Use - Storage

Overall, a similar percentage of males and females use the shopping cart to store items with plans to revisit later (72% and 74% respectively). More males (21%), however, use the cart for this purpose every time they shop compared to females (15%).
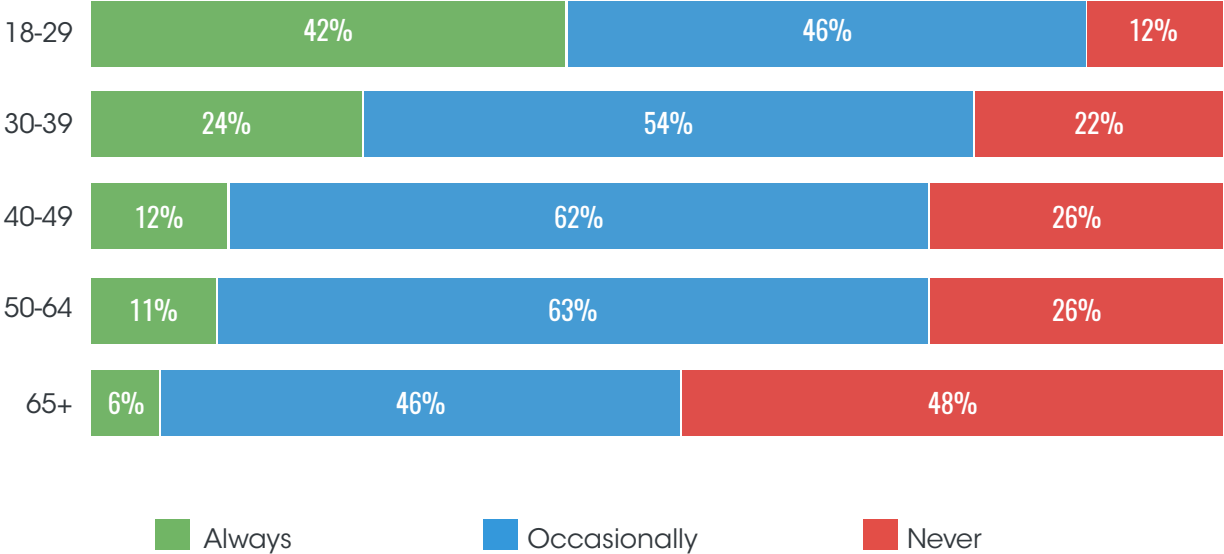
Items Saved in Cart to Buy Later - All Online Shoppers

	Always	Occasionally	Never
Male	21%	51%	28%
Female	15%	59%	26%

Legend: ■ Always ■ Occasionally ■ Never

The youngest demographic in the study (18-29 year olds), often referred to as Millennials and Digital Natives, use the shopping cart to store items significantly more often than any other age group. A whopping 88% of 18-29 year olds use the shopping cart this way. Of this demographic, 42% store items in the cart with plans to come back and buy every time they shop.

Online shoppers aged 30-64 share similar rates, though 30-39 year olds are more than twice as likely as older generations to use the shopping cart this way.

Items Saved in Cart to Buy Later - By Age

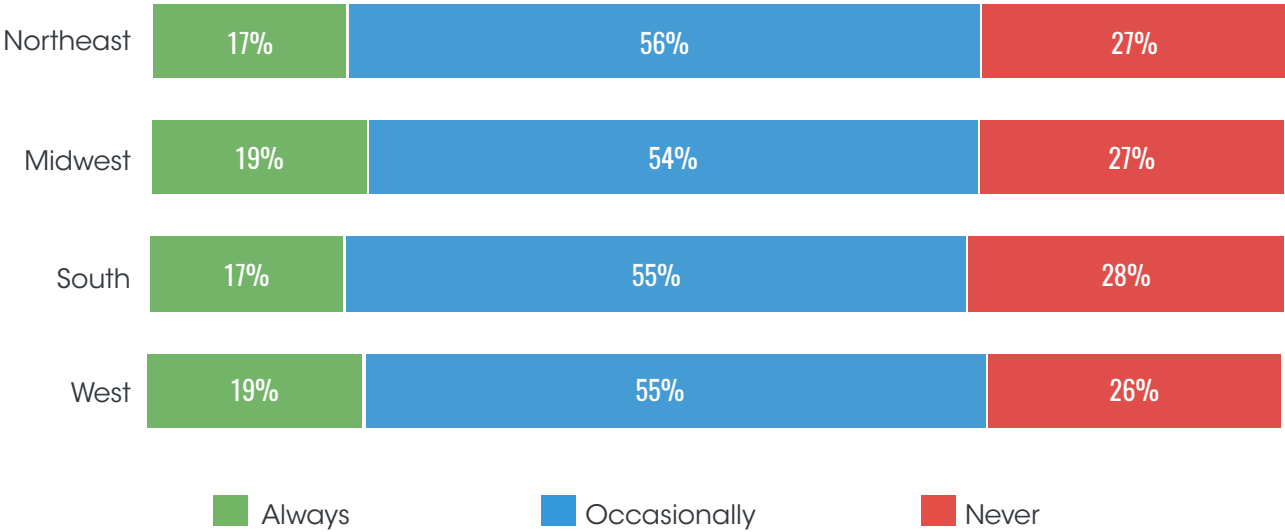|	Always	Occasionally	Never
18-29	42%	46%	12%
30-39	24%	54%	22%
40-49	12%	62%	26%
50-64	11%	63%	26%
65+	6%	46%	48%

Legend: ■ Always ■ Occasionally ■ Never

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Shopping Cart Use - Storage

When it comes to shopping cart use and expectations, variations across regions of the US were not as drastic as some of the regional mobile device use and shopping frequency results revealed in Parts 1 and 2 of the *Consumers Tell All* series. All regions of the US are in line with the rates seen for all online shoppers.

Items Saved in Cart to Buy Later - By Region

Region	Always	Occasionally	Never
Northeast	17%	56%	27%
Midwest	19%	54%	27%
South	17%	55%	28%
West	19%	55%	26%

Always   Occasionally   Never

The previous section showed how online shoppers rely on the shopping cart to store items they plan to buy later. But what happens between the decision to leave items in the cart and the completion of a purchase? It is often a winding path that could include interactions with a retailer's desktop site, mobile site, app or store location, as well as visits to competitors' sites, comparison shopping tools or deal sites.

To better understand how consumers use the cart to navigate this winding shopping journey, online shoppers were asked:

Do you leave items in the shopping cart to view later on a mobile device or in a store?

Forty percent of online shoppers plan to revisit the items left in the shopping cart while in a physical store or on a mobile device. Slightly more (12%) report viewing their carts in a store location every time they shop compared to those who view on a different device (10%). These results should motivate retailers to ensure shopping cart pages are optimized for mobile devices and that store staff can help the customer easily transition from the online shopping cart to in-store shopping.

### View Cart on a Different Device - All Online Shoppers

10%	30%	60%
■ Always	■ Occasionally	■ Never

View Cart in a Store - All Online Shoppers

| 12%	28%	60%
■ Always	■ Occasionally	■ Never

Shopping Cart Use - Transitioning Between Devices and Channels

Male online shoppers are slightly more likely to transition from the shopping cart to a store or mobile device than females. The number of men who always use the shopping cart to transition between devices or to in-store shopping is twice the number of their female counterparts.

View Cart on a Different Device - By Gender

Male	14%	30%	56%

Female	7%	30%	63%

🟩 Always   🟦 Occasionally   🟥 Never
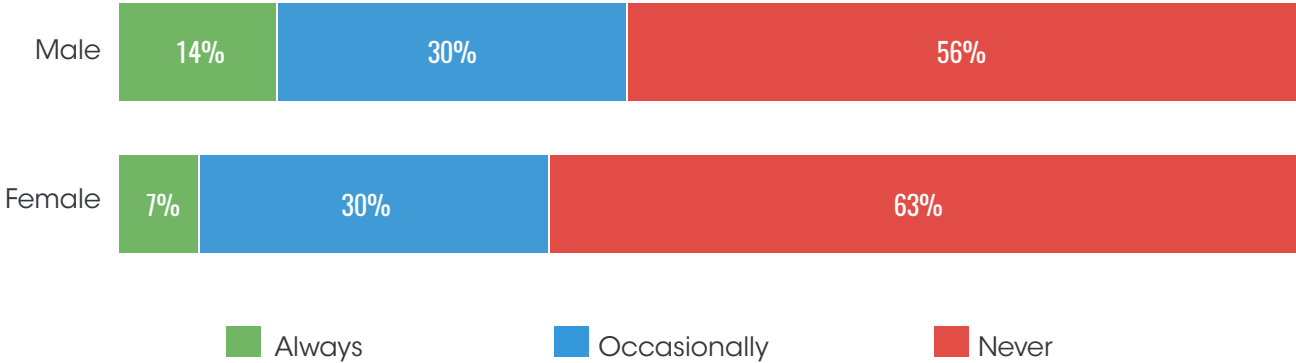
View Cart in a Store - By Gender
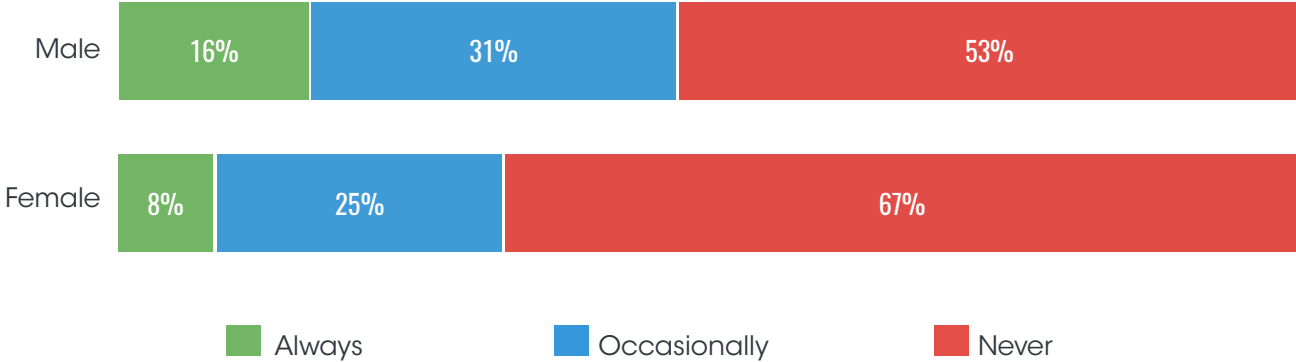
Male	16%	31%	53%

Female	8%	25%	67%

🟩 Always   🟦 Occasionally   🟥 Never

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More than half of online shoppers under 40 rely on the cart to pivot the shopping experience onto a mobile device or into a store. The overall rate of these device and channel transitions declines as the shopper ages.
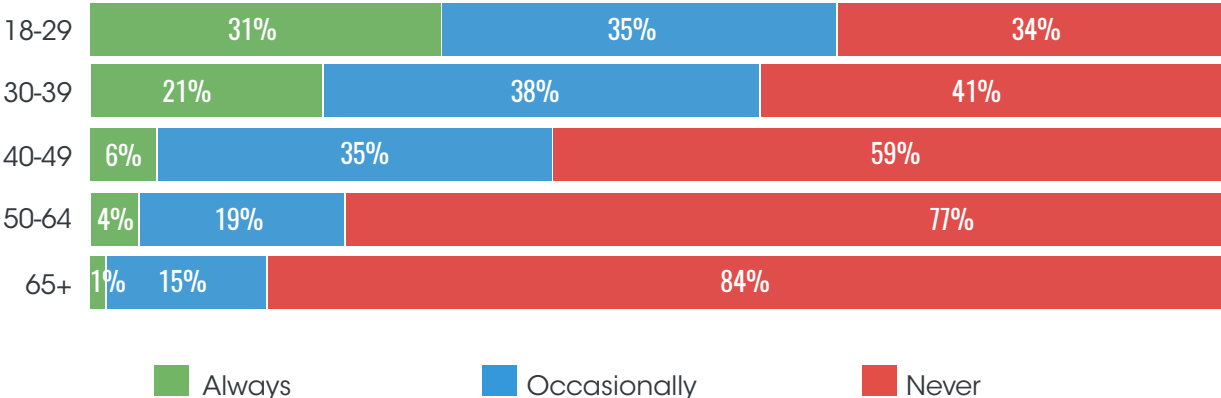
The youngest demographic in the study, those 18-29 years old, soars above the older generations with two-thirds of the group using the cart to move between devices and channels when they shop. The actions taken by these digital natives may represent a bellwether for what will be a more common shopping experience expectation as consumers' age and mobile devices become an even more central part of shopping.

The number of shoppers who always make these transitions when shopping online also declines with age. Online shoppers over 40 may occasionally use the cart to make these moves, but they are significantly less active than younger demographics.

View Cart on a Different Device - By Age

Age	Always	Occasionally	Never
18-29	28%	39%	33%
30-39	17%	39%	44%
40-49	6%	36%	58%
50-64	4%	22%	74%
65+	1%	15%	84%

■ Always   ■ Occasionally   ■ Never

View Cart in Store - By Age

Age	Always	Occasionally	Never
18-29	31%	35%	34%
30-39	21%	38%	41%
40-49	6%	35%	59%
50-64	4%	19%	77%
65+	1%	15%	84%

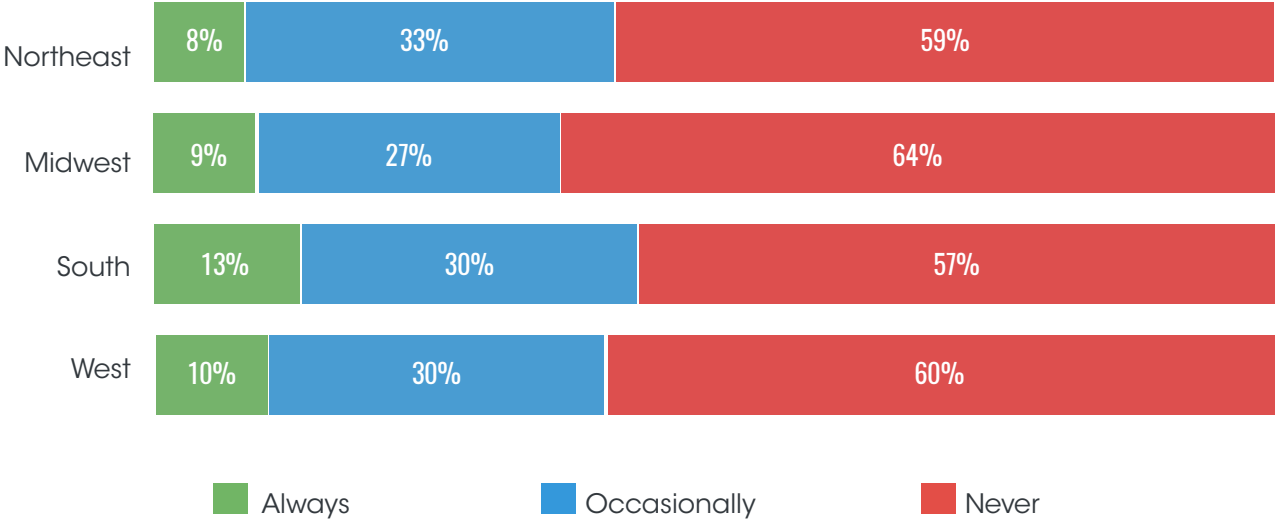■ Always   ■ Occasionally   ■ Never

Bronto
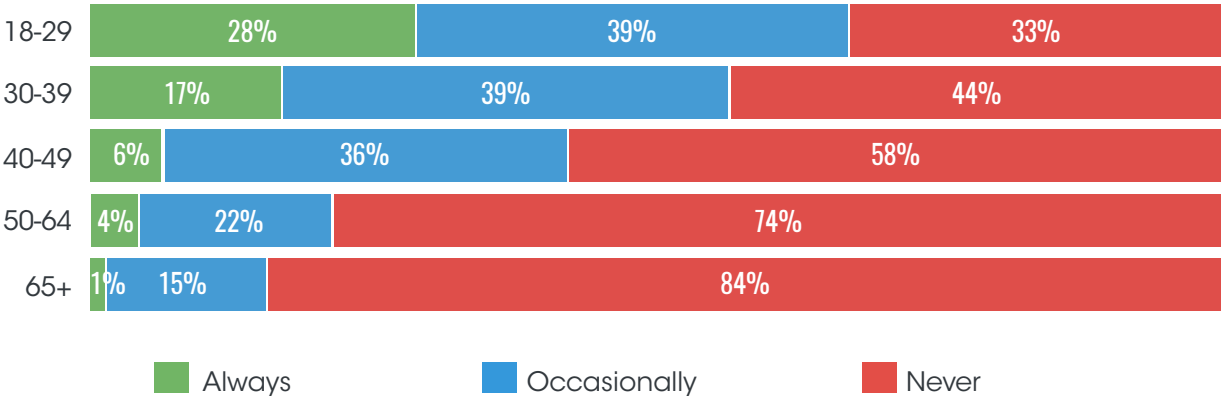
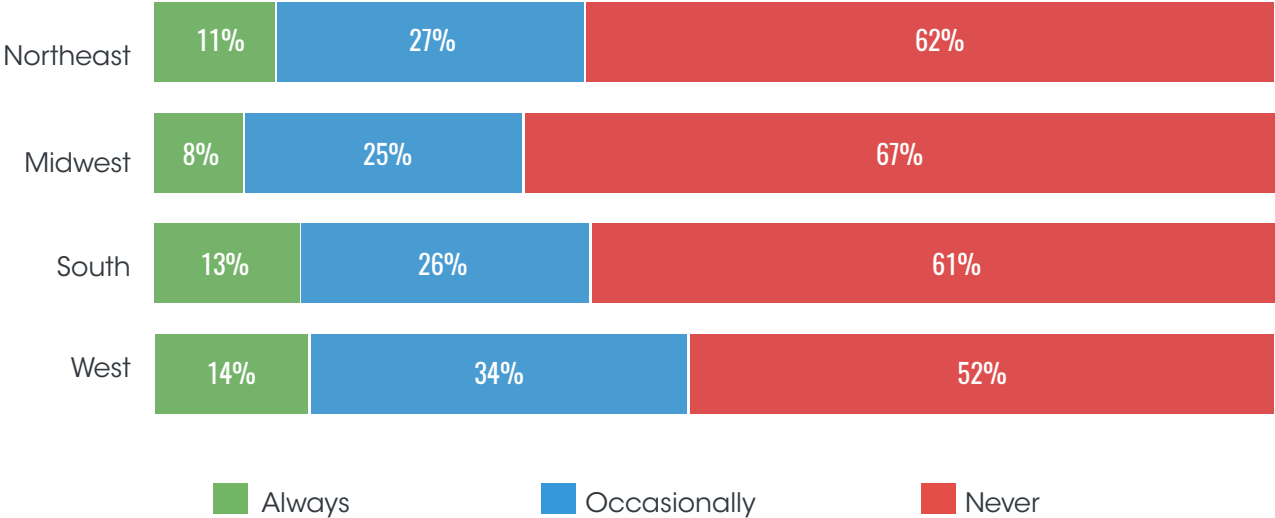# Shopping Cart Use - Transitioning Between Devices and Channels

Online shoppers in the South make the most moves between the cart and mobile devices (43%), while those in the West are more actively moving between the cart and a store location (48%).

In the South, 13% of online shoppers use the cart to transition shopping to a different device every time they shop. At 14%, the West leads the pack for viewing their online carts in a store location every time they shop, though the South is close behind at 13%. The Midwest showed the least of these transitions on all fronts.

View Cart on a Different Device - By Region

Region	Always	Occasionally	Never
Northeast	8%	33%	59%
Midwest	9%	27%	64%
South	13%	30%	57%
West	10%	30%	60%

Always   Occasionally   Never

View Cart in a Store - By Region

Region	Always	Occasionally	Never
Northeast	11%	27%	62%
Midwest	8%	25%	67%
South	13%	26%	61%
West	14%	34%	52%

Always   Occasionally   Never

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For years, retailers have invested time and resources into improving marketing efforts and user experiences surrounding the shopping cart. As the previous data shows, consumers have found ways to leverage the shopping cart as a tool to help them navigate purchase decisions. But what do consumers expect to happen after items are left in the cart?

This section explores consumer expectations after leaving products in the shopping cart and reveals whether they find these strategies to be helpful, annoying or intrusive.
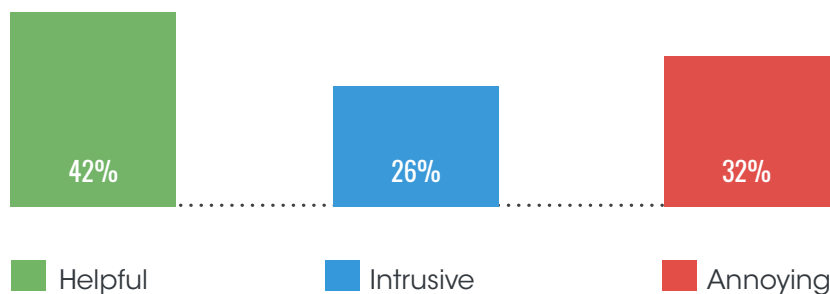
Perceptions of Shopping Cart Reminders

This section explores how many online shoppers expect to receive reminder emails when items have been left in the shopping cart. While these messages may be more common from the consumer's perspective, it's important to understand if the emails are considered to be helpful and add value to the shopping experience. To better understand what consumers really think, online shoppers were asked:

Do you find notifications reminding you about items in your shopping cart helpful, annoying or intrusive?

Overall, 42% of online shoppers find cart reminders to be helpful. As this study has revealed, many shoppers use the cart to store items for later, and the reminder email can connect them back to shopping on a different device, in a store or at a time that is more convenient. Many retailers are concerned that consumers may have a negative view of these messages. While 26% of online shoppers felt these messages can be intrusive, it's still significantly less than the percentage who found the messages to be helpful.
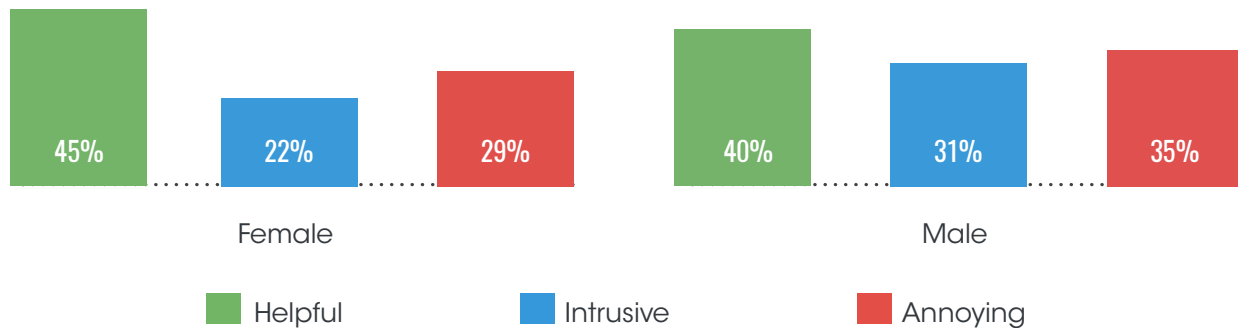
Cart Reminder Perception - All Online Shoppers

42%   26%   32%

Helpful   Intrusive   Annoying
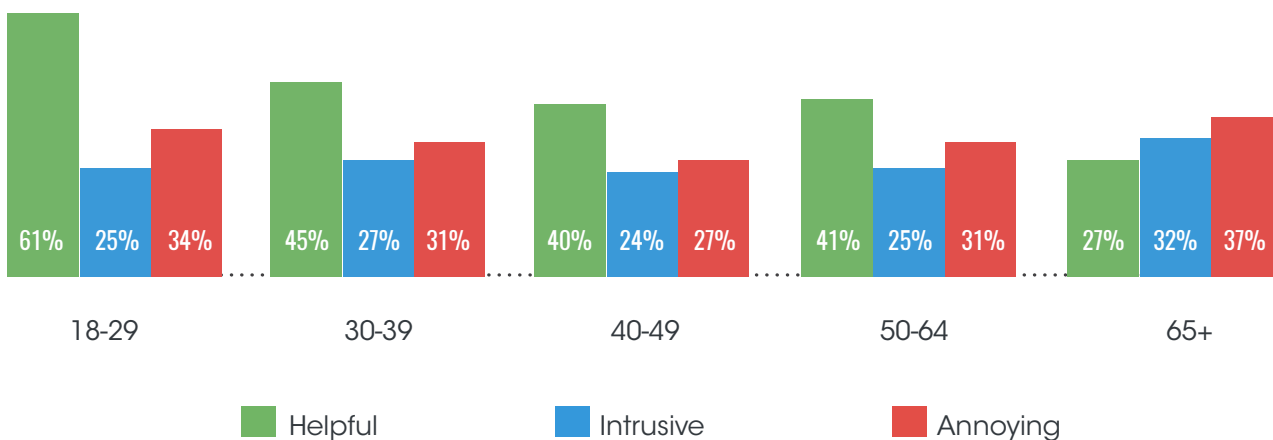
Shopping Cart Reminders - Perceptions

More females find cart reminders to be helpful than male shoppers (45% vs. 40%). Males (31%) found cart reminders to be intrusive or annoying more often than females (22%). Cart reminders targeted to male shoppers should be tested to find the optimal mix of tone, timing and content.

Cart Reminder Perception - by Gender

	Female	Male
Helpful	45%	40%
Intrusive	22%	31%
Annoying	29%	35%

Helpful (green) | Intrusive (blue) | Annoying (red)

More than half of online shoppers aged 18-29 found cart reminders to be helpful, while seniors (those aged 65+) tended to view them as intrusive (32%) or annoying (37%). Retailers should consider how these perceptions could impact the performance of cart reminder emails and test a mix of content that will connect the most with shoppers. This may mean less product- and price-related content for older shoppers.

Cart Reminder Perception - by Age

	18-29	30-39	40-49	50-64	65+
Helpful	61%	45%	40%	41%	27%
Intrusive	25%	27%	24%	25%	32%
Annoying	34%	31%	27%	31%	37%

Helpful (green) | Intrusive (blue) | Annoying (red)

The Midwest, South and West all showed similar perceptions of cart reminder emails. A larger percentage of shoppers in the Northeast, however, found these messages to be helpful.

Cart Reminder Perception - by Region

| Region	Helpful	Intrusive	Annoying
Northeast	45%	23%	25%
Midwest	40%	29%	33%
South	42%	26%	34%
West	43%	26%	33%

Helpful — Intrusive — Annoying
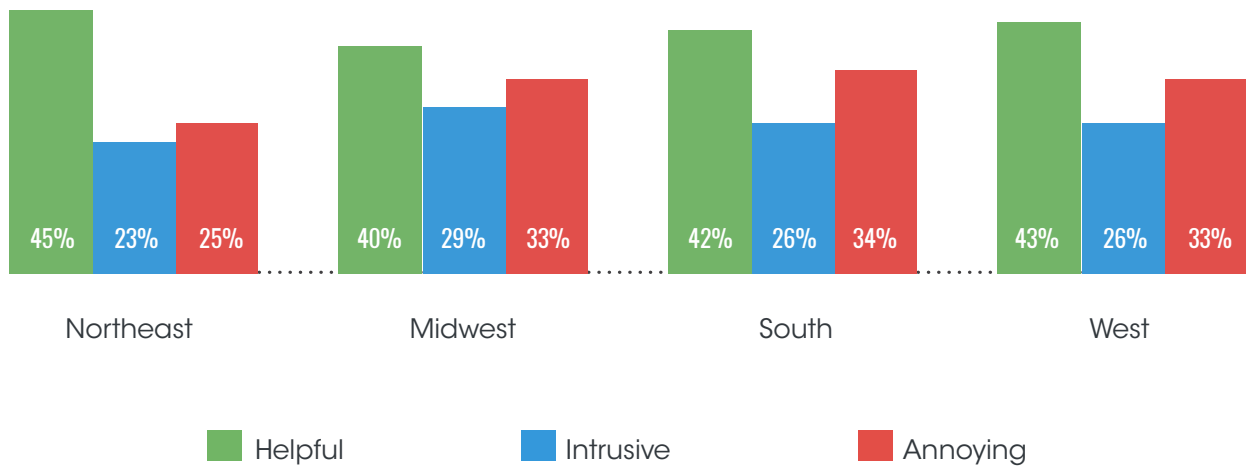
Overall, 44% of online shoppers expect to review a shopping cart reminder email when items have been left behind in the cart. To better understand what kind of messages these shoppers expect to receive, the following question was asked to the group:

After leaving items in your shopping cart, do you expect to receive any of the following?

Nearly half of all online shoppers who expect to receive a cart reminder (48%) do not expect the email to contain a discount, incentive or free shipping offer.
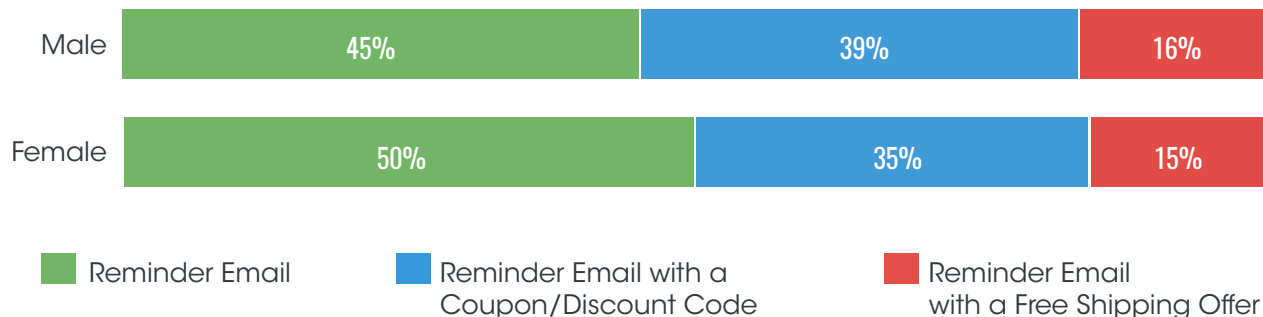
Of the remainder, more shoppers answered that they expect a reminder email to contain discounts and coupons (37%) rather than free shipping offers (15%). With so many retailers offering evergreen free shipping on all orders, free shipping may not be compelling enough to get the shopper re-engaged in the shopping process.

Post-Cart Abandonment Expectations - All Online Shoppers

48%	37%	15%

- Reminder Email
- Reminder Email with a Coupon/Discount Code
- Reminder Email with a Free Shipping Offer
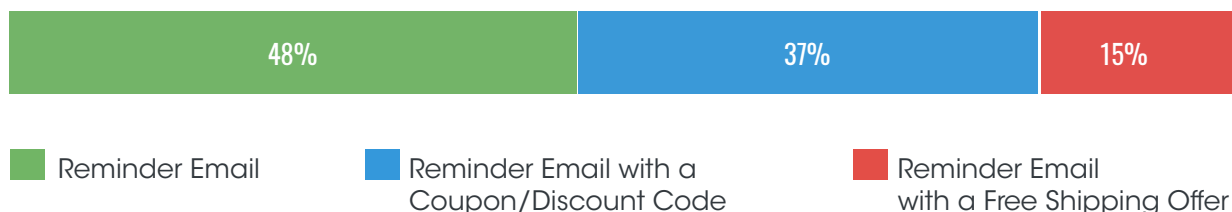
Half of female online shoppers did not expect a cart reminder to include any incentive compared to 45% of males. Males also showed a stronger preference for coupons and discounts than their female counterparts.

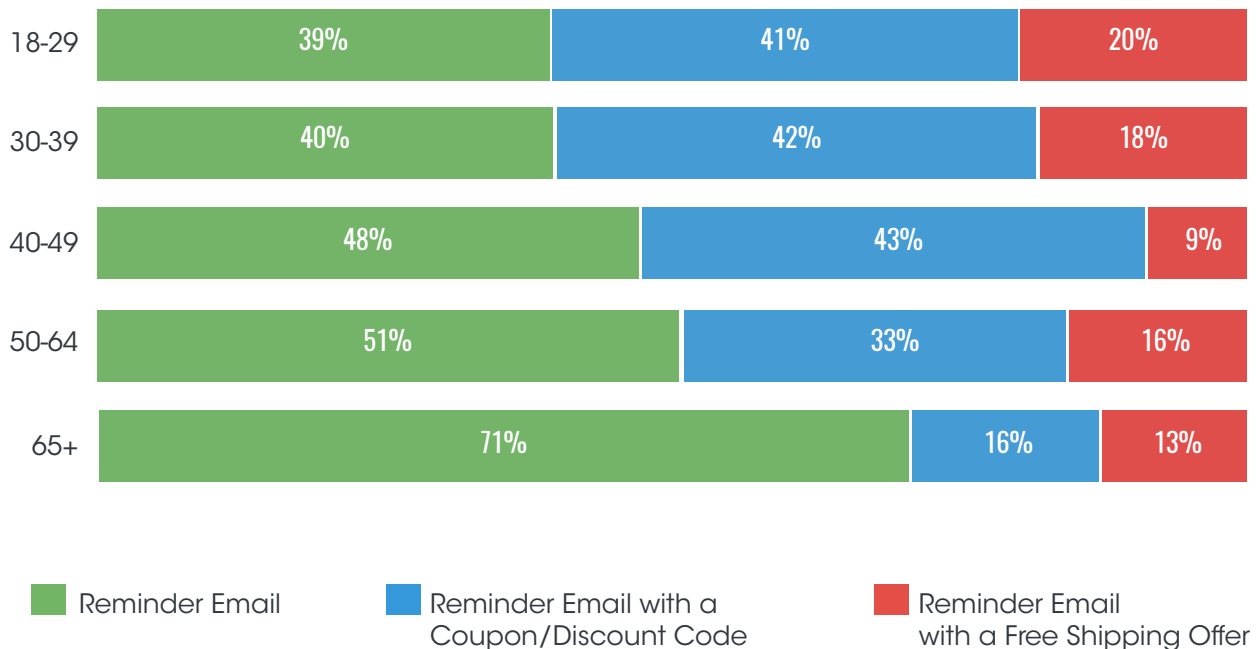### Post-Cart Abandonment Expectations - By Gender

Male	45%	39%	16%
Female	50%	35%	15%

- Reminder Email
- Reminder Email with a Coupon/Discount Code
- Reminder Email with a Free Shipping Offer

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More than half of online shoppers under 50 years old expect to receive cart reminders offering a discount or free shipping. The youngest group in the study, those 18-29 years old, showed the highest interest in free shipping offers at 20% while shoppers aged 40-49 showed the lowest at only 9%.

Seventy-one percent of seniors, those at least 65 years old, showed the strongest preference for reminder emails containing no offer and were rather evenly divided between expectations of discounts and free shipping.

Post-Cart Abandonment Expectations - By Age

Age	Reminder Email	Reminder Email with a Coupon/Discount Code	Reminder Email with a Free Shipping Offer
18-29	39%	41%	20%
30-39	40%	42%	18%
40-49	48%	43%	9%
50-64	51%	33%	16%
65+	71%	16%	13%

Reminder Email

Reminder Email with a Coupon/Discount Code

Reminder Email with a Free Shipping Offer

Shopping Cart Reminders - Email Expectations

Online shoppers in the Northeast showed the strongest expectations for non-incentivized cart reminders (54%) and were closely split between expectations of emails containing discounts or free shipping. At 48%, the Midwest showed the highest expectation for cart reminders containing discounts and the lowest interest in free shipping offers.

Post-Cart Abandonment Expectations - By Region

Region	Reminder Email	Reminder Email with a Coupon/Discount Code	Reminder Email with a Free Shipping Offer
Northeast	54%	24%	22%
Midwest	48%	41%	11%
South	48%	38%	14%
West	43%	40%	17%

Legend:
- Reminder Email
- Reminder Email with a Coupon/Discount Code
- Reminder Email with a Free Shipping Offer

Bronto
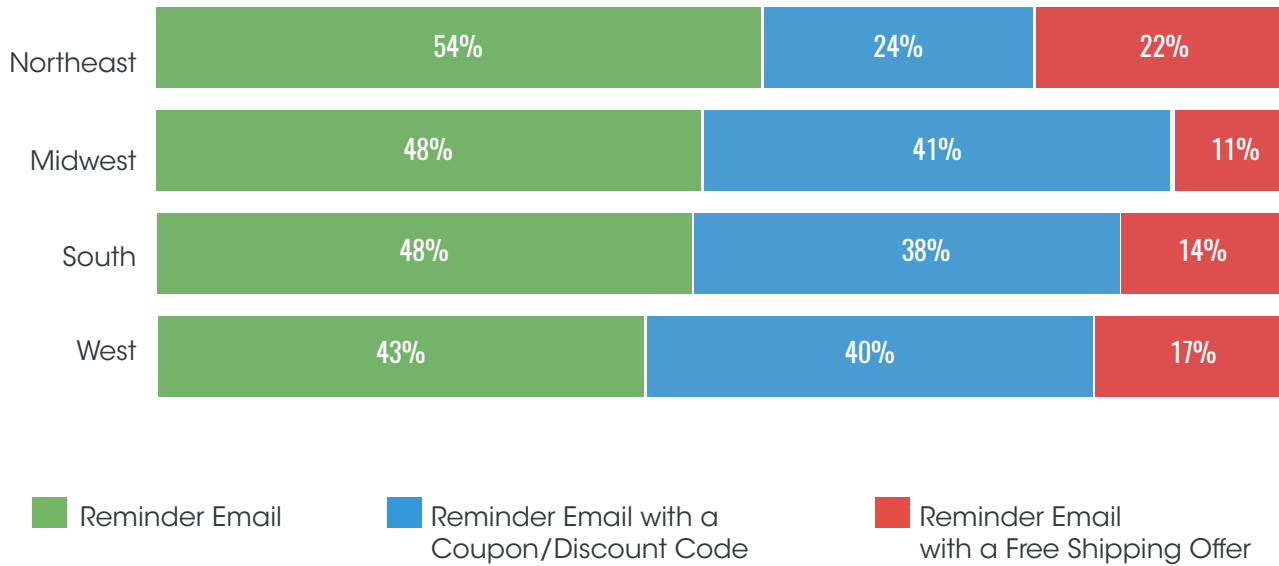
How quickly do you expect to receive a notification after you leave items in your cart?

Many retailers have found success by sending cart reminders very quickly after items have been left in the cart, though shoppers seem to prefer a bit of a delay. While 74% of online shoppers expect the message to be received within 24 hours after items have been left in the cart, the largest percentage (35%) expect the messages to hit their inboxes between 12-24 hours.

Interestingly, 14% of shoppers expect to receive a cart reminder as soon as the items have been left in the cart. As this report has shown, many consumers view the cart as a shopping tool and delaying these messages, even if the expectation for timing has a longer tail, could result in the shopper not being able to make the timely transitions they need to keep the shopping momentum going.
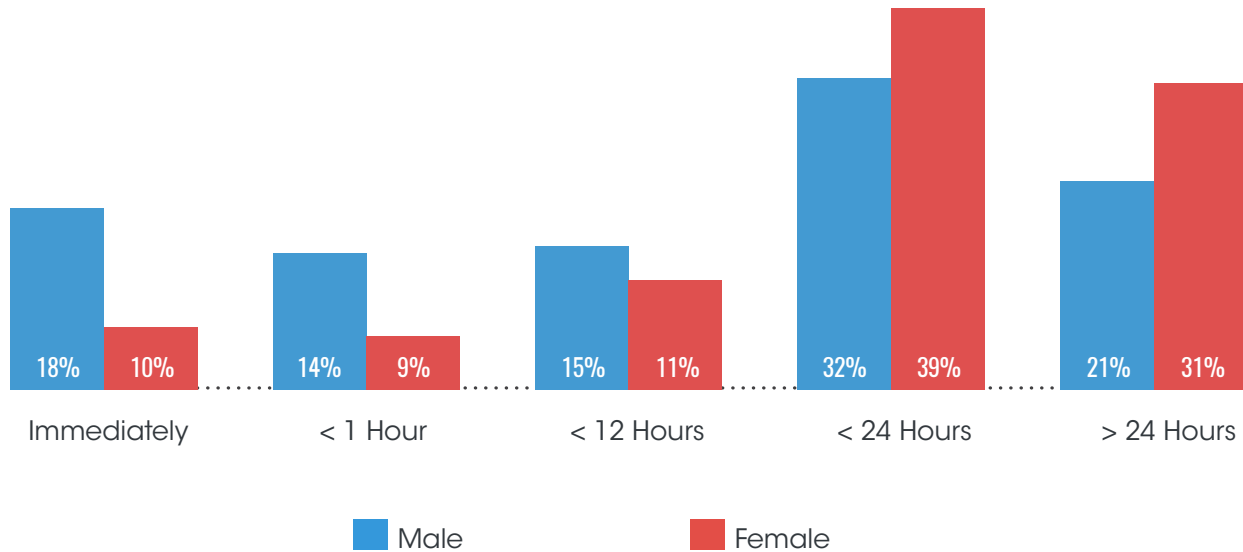
Cart Reminder Timing - All Online Shoppers

Immediately	< 1 Hour	< 12 Hours	< 24 Hours	> 24 Hours
14%	11%	13%	35%	26%
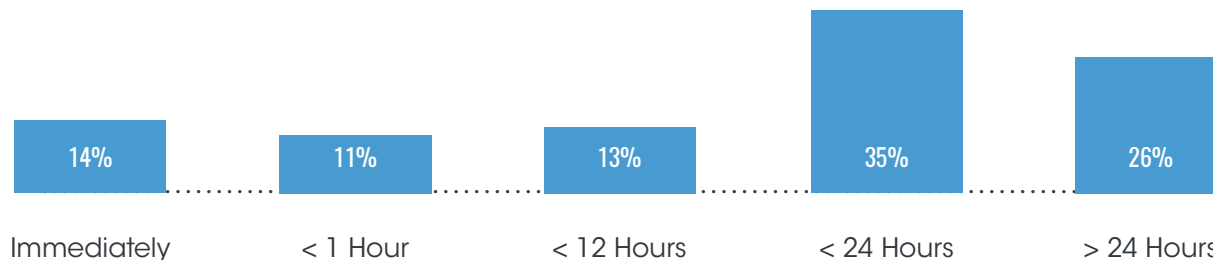
Shopping Cart Reminders - Email Expectations

Nearly twice as many males (18%) as females (10%) expect to receive cart reminder emails as soon as they exit the cart. Females show a stronger preference for cart reminders that are sent between 12-24 hours (39%) or after a full day has passed (31%).
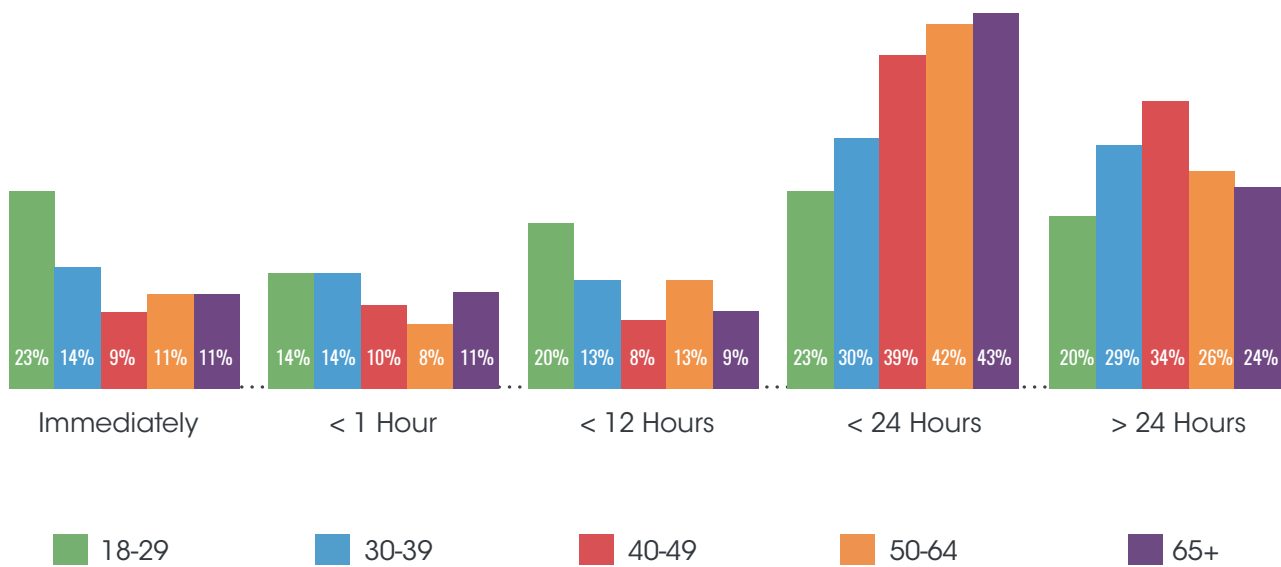
Cart Reminder Timing - by Gender

	Immediately	< 1 Hour	< 12 Hours	< 24 Hours	> 24 Hours
Male	18%	14%	15%	32%	21%
Female	10%	9%	11%	39%	31%

Male ■ Female ■

Online shoppers under 40 showed the most interest in immediate shopping cart reminders with 18-29 year olds showing the strongest preference. Only 14% of shoppers aged 30-39 expected immediate cart reminders compared to a staggering 23% of 18-29 year olds.

Shoppers aged 40-49 bucked the trend a bit by showing the weakest preference for immediate reminders and the strongest preference for reminders sent at least 24 hours after items were left in the cart. Shoppers 50 and older showed a strong preference for cart reminders sent between 12-24 hours after leaving their carts.
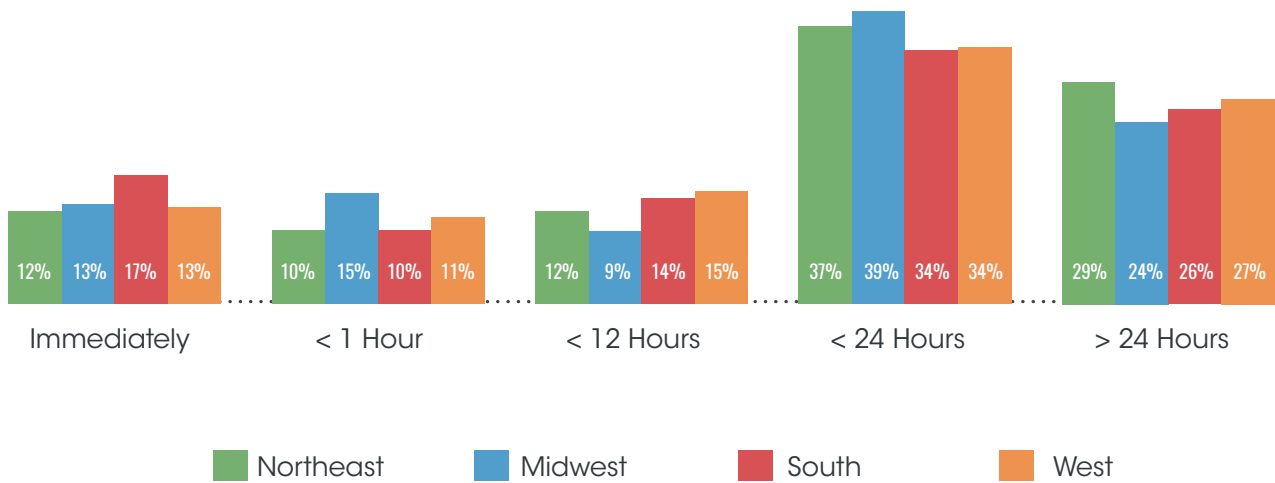
Cart Reminder Timing - by Age

	Immediately	< 1 Hour	< 12 Hours	< 24 Hours	> 24 Hours
18-29	23%	14%	20%	23%	20%
30-39	14%	14%	13%	30%	29%
40-49	9%	10%	8%	39%	34%
50-64	11%	8%	13%	42%	26%
65+	11%	11%	9%	43%	24%

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Shopping Cart Reminders - Email Expectations

Timing expectations for cart reminder emails did not vary much across the regions of the US, though the South did show a slightly stronger preference for immediate reminders (17%). The Northeast and Midwest had the highest preference for cart reminders sent between 12-24 hours after leaving items in the cart.

Cart Reminder Timing - by Region

	Immediately	< 1 Hour	< 12 Hours	< 24 Hours	> 24 Hours
Northeast	12%	10%	12%	37%	29%
Midwest	13%	15%	9%	39%	24%
South	17%	10%	14%	34%	26%
West	13%	11%	15%	34%	27%

The lines between shopping online and in-store have blurred. Consumers use a variety of devices to find products they may be interested in buying and want to move seamlessly between sites and stores before completing an order. For retailers, this means rethinking once dependable e-commerce strategies that may not be enough to keep today's shoppers engaged.

This study has shown how online shoppers rely on the shopping cart to make these transitions between devices and channels and should motivate retailers to optimize the shopping cart and checkout experience, as well as cart reminder email strategies. Not all shoppers are leaving items in the cart with no plan to return. Shopping cart marketing strategies need to help the consumer re-enter the path to purchase when and where they choose and provide an engaging, relevant experience regardless of the device (or devices) being used.

To learn more about how shoppers are changing the e-commerce landscape, download the rest of the *Consumers Tell All* series at bronto.com/tellall.