BOLDCHAT by LogMeIn

Research Report

Effective Mobile Engagement

2014

Foreword & additional analysis by the e-tailing group

BOLDCHAT by LogMeIn

Table of Contents

Foreword: *Lauren Freedman, President, the e-tailing group* 1
What is Mobile Engagement? 3
Methodology 4
Sample and Survey Instrument 4
Conclusions 5
#1: Mobile Engagement is Flourishing 5
#2: No Mobile Engagement Strategy is Complete without Text-Based Channels like Chat 5
#3: Mobile Changes Everything 5
#4: High Frequency Shoppers and Technical Support Seekers Suggest Unique Considerations 5
#5: Support and Sales are Different 5
Detailed Conclusion Analysis 6
#1: Mobile Engagement is Flourishing 6
Where is Mobile Engagement Happening? 6
Who Engages While Mobile? 7
Channels of Mobile Engagement 9
#2: No Mobile Engagement Strategy is Complete without Text-Based Channels like Chat 10
#3: Mobile Changes Everything 12
#4: High Frequency Shoppers and Technical Support Seekers Suggest Unique Considerations 14
Demographic Profile 15
Engagement Patterns 15
Mobile's Impact on Success/Satisfaction 17
#5: Support and Sales Are Different 19
Conclusion/Next Steps 24

Table of Figures

Figure 1: Summary of Open Ended Response Themes 2
Figure 2: Sample Geographic Location 4
Figure 3: Survey Schematic 4
Figure 4: Mobile Engagement Frequency 6
Figure 5: Mobile Engagement (Geo) 7
Figure 6: Mobile Device Usage 7
Figure 7: Mobile Device Usage (Gender/Age) 8
Figure 8: Frequent Mobile Engagers (Gender/Age) 8
Figure 9: Support Mobile Engagement Channels (Geo) 9
Figure 10: Shopping Mobile Engagement Channels (Geo) 9
Figure 11: Frequent Mobile Chat Engagement (Geo) 10
Figure 12: Proactive Chat Receptiveness (Geo) 11
Figure 13: Proactive Receptivity (Mobile) 12
Figure 14: Support Engagement Satisfaction Criteria/Changes (Mobile) 13
Figure 15: Chat Session Success & Mobile Impact 14
Figure 16: Demographic Profile (Support Seekers/Shoppers) 15
Figure 17: Mobile Tech Seekers/Shoppers (Geo) 15
Figure 18: Mobile Engagement Channels (Tech/Shoppers) 16
Figure 19: Mobile Chat Engagement (Tech/Shoppers) 16
Figure 20: Mobile Channel Preference (Shoppers/Support Seekers) 17
Figure 21: Chat Session Determinants and Changes 17
Figure 22: Support Satisfaction Determinants/Changes when Mobile 18
Figure 23: Mobile Engagement Location (Support vs. Sales) 19
Figure 24: Mobile Engagement Time of Day (Sales vs. Support) 20
Figure 25: Mobile Channel Preference (Sales vs. Support) 20
Figure 26: Mobile Engagement Channel Satisfaction (Sales vs. Support) 21
Figure 27: Mobile Support Engagement Satisfaction (Industry) 21

Foreword:

By Lauren Freedman, President, the e-tailing group

On Guard: Your Customer is Mobile-Engaged

Your customer is connected and they want to engage with you.

Consideration of the following mobile growth stats reported on the Digital Buzz Blog[1] should serve as a wakeup call to every company across industries:

- 91% of all people on earth have a mobile phone
- 56% own a smartphone
- 50% of mobile phone users report mobile as their primary Internet source
- There are over 1.2 Billion people accessing the web from their mobile devices

LogMeIn, Inc. reached out to the e-tailing group to collaborate on this exciting mobile engagement research in part because, over the years, we have been pioneers in assessing the business impact of new technologies from eCommerce to social media to mobile. Four years ago, we followed consumers as they embraced mobile shopping, and we developed the first mobile mystery shopping research. Just as our research hopes to elevate the customer experience, one of our early goals was to understand the state of mobile shopping and customer service in order to establish early industry benchmarks and foster development of tools.

Over the past few years, our work with leading technology companies has explored how mobile devices are used for research and buying as standalone devices and across channels and the impact that was being felt as shoppers shifted away from their PCs. Lastly our Annual Merchant Survey continues to question retailers about their investments in mobile and the tactics that best support their goals. Each of these forays has uniquely positioned the e-tailing group to once again partner with LogMeIn. Beyond the insights and learning our shared goal is simple: to develop best practices for companies as they connect with their customers knowing that exemplary service is almost always their #1 retention tool.

Before initiating the collaboration, we undertook an extensive review of existing mobile research. The majority of the available research centers on device proliferation and behavior. Most of the research on shopping is focused on the path-to-purchase and then in-store behavior, some of which was our own, resultant from projects we had conducted on behalf of technology clients. Only one instance of customer service-oriented questions existed, prompting our interest in a full throttle mobile engagement study. This would be an opportunity to hear first-hand from the consumer in this burgeoning field.

While it is interesting to view the results in aggregate, it is essential to remember that phones and tablets are personal and usage patterns are particular to the individual. The consumer is a problem solver by nature and the mobile device is seen as an excellent time-savings tool for everything from general support questions to more specific research needs. The harried nature of our lives today means multitasking is an everyday occurrence. From comparison shopping to reading peer reviews, mobile devices simply provide a quicker, faster and more effective way to run our lives. The phone is simply part of the path-to-purchase or path-to-service satisfaction and expectations are heightened knowing mobile's ability to more quickly solve problems and support shopping behavior.

Of course quantitative analysis is core to this report with many significant findings, but we couldn't help but review the qualitative input shared by over 5,000 mobile users.

1. SuperMonitoring; 2013

Those findings are integrated throughout the research to bring the findings to life. Another reason LogMeIn, as well as other clients, turn to the e-tailing group is because of our knack for bringing the voice of the customer to the fore. Lastly, these responses have been invaluable as we have put together a field guide for companies to evaluate their mobile engagement to ensure every interaction is both positive and, in some way, contributes to the bottom line.

Mobile engagement is happening in every industry. When asked what types of companies they have engaged in a mobile live chat, respondents to our survey answered from Amazon to the US Government to Skype to local phone providers; the breadth was truly astounding. From an industry perspective mobile phone providers and ISPs not surprisingly ranked highest. It's important to note though, that *every* industry was in double digits including schools, cable companies, insurance and logistics providers like FedEx or UPS.

I am always surprised and admire the consumers' interest in adopting new technologies and embracing new channels. A good example of that can be seen in proactive chat viewed completely positively by 41% of those surveyed. Just several years ago when posing questions in this area, many more people than now indicated that it was intrusive. It's interesting to note that as mobile technology becomes a greater factor, perhaps proactive invites are seen as problem solvers where resolution is quicker and thus more favorable to mobile engagers.

Expectations across the board are similar for all contact points with only slight variation. This consumer, particularly the heavy/high frequency user of mobile for both support and shopping is seasoned and demanding. They are an important segment to watch as their early adoption of technology establishes a new normal for those who follow behind.

Today's consumer has high expectations for mobile engagement and when asked, "What factors contribute to a good mobile customer experience," their responses are succinct and directive. There is almost an obsession with speed and mobile-only accelerates those expectations. They seek thoughtful, efficient answers from respectful and well trained customer service reps. Ideally, they would like those answers to happen on their first interaction. Interestingly, they often pointed out that they care about the agent's politeness and their professionalism as well. Figure 1 summarizes verbatim phrases from the thousands of open-ended responses we received regarding the mobile engagement desires of today's worldwide users.

Verbatim Summary

Speed	People	Attitude	Mindset
Brief	Attentive	Acknowledging	Available/ Accessible
Concise	Agile	Caring/ Empathetic	Effective
Efficient	Good Listeners	Friendly/ Pleasant	Reliable
Fast	Knowledgeable	Focused	Accurate
	Real	Helpful	Empowered
	Responsive	Respectful	Personalized
	Speak my Language	Professional	Precise
	Competent	Polite	Right

Figure 1: Summary of Open Ended Response Themes

Companies across every vertical must be on guard as consumers find every mobile means possible to engage with you. They expect a lot and business success and longevity depends on your actions.

Truly,

Lauren Freedman
President, the e-tailing group

Introduction

For five contiguous years, BoldChat© by LogMeIn, published a proprietary research analysis on the effectiveness of live chat technology. 2013 marked the last year of the study because, in the words of the final report, the time had come to focus attention on new research pursuits[2]. Those new pursuits have materialized here, in a global study of more than 5,800 mobile device owners. This project is undoubtedly the most comprehensive primary research effort ever done on mobile engagement.

In the past two years, businesses' desire to understand and connect with the mobile user has spread like a contagion, infecting nearly every vertical market with equal virulence. We created this project specifically as an antidote, seeking to understand the mindset, demographics, and behaviors that drive mobile engagement so that we can advise businesses on how to do it right. And how to avoid doing it wrong.

This report, based on the survey results with nearly six thousand respondents across ten countries, sheds light on the following questions:

- What is the current state of mobile engagement? For example, how often do consumers engage using their mobile devices? What channel of mobile engagement do they choose? With what industries are they engaging and are those industries doing it well, from the consumer's perspective?

- Are there unique differences between engaging for technical support vs. engaging along the path to purchase during a shopping experience? Are the differences owing to the situation, or the person who engages, or both?

- Does engagement, simply by the nature of occurring while mobile, alter someone's expectations of what makes an engagement successful or satisfactory?

- Are consumer expectations heightened simply because of the device in their hands?

- How widespread is mobile engagement and what can firms do to effectively engage their own customers who choose to connect with them using mobile devices?

We begin the analysis with a simple definition of mobile engagement, an overview of the research methodology, a brief discussion of the main conclusions of this report, and then a thorough, deep-dive into each data-based finding.

What is Mobile Engagement?

Mobile engagement is not advertising. While the issuance of mobile ads is a discipline in and of itself, it is distinct from the concept of mobile engagement. Mobile engagement is about communication or the facilitation of conversations between a business and a customer either in real-time or asynchronously, through a variety of connection channels.

The widespread adoption of both smartphones and tablets, coupled with their constant connection to social media outlets, has shifted the customer/business balance of power squarely to the consumer. Because of this phenomenon, "mobile engagement" today, looks much different than it should. One of the hopes of this research effort, over time, is to empower businesses to better understand mobile engagement so that they might embrace it, optimize it, and build competitive advantage from its superlative execution.

Today's definition, decidedly reactive from a business perspective, might read something like this:

> *Mobile engagement is when a customer chooses to connect with a business, either due to convenience or circumstance, in order to seek support for an issue or to assist them in researching and transacting business with the firm in question.*

2. *Live Chat Effectiveness 2013, BoldChat©, by LogMeIn*

The definition we hope that businesses will adopt sounds more like this:

> *Mobile engagement is an operational practice which includes an organized and intentional set of actions, processes, people, and technology aimed at being ready to efficiently and superlatively handle customers who engage from mobile devices **and** the ability to purposefully and proactively engage mobile customers in order to assist them whenever, wherever, and however they want to be helped.*

In order to achieve the second definition, companies must understand why mobile engagement happens, with whom, what drives engagement satisfaction, and when to engage proactively. This research was specifically conceived to address these questions.

Methodology

Here we broadly describe the survey sample and the instrument used to collect the data.

Sample and Survey Instrument

The study was conducted entirely online using a third party opt-in panel. The geographic dispersion of the respondent pool was across ten individual countries, though the European Union Countries have been combined in the graph below and throughout the analysis as well.

Sample Geographic Location

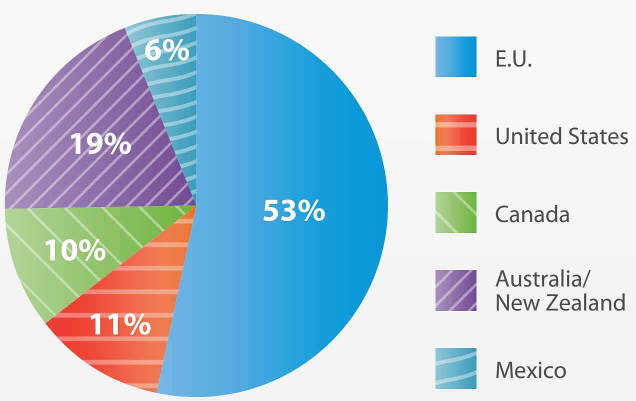

Figure 2: Sample Geographic Location

Those surveyed (often referred to as 'entire sample,' 'all,' 'entire universe,' 'respondent universe,' 'population,' or other derivatives of these terms) totaled 5,808.

The survey took between 10 and 20 minutes to complete depending on which sections/branches the respondent qualified for. A schematic of the survey can be seen below:

Mobile Engagement Survey

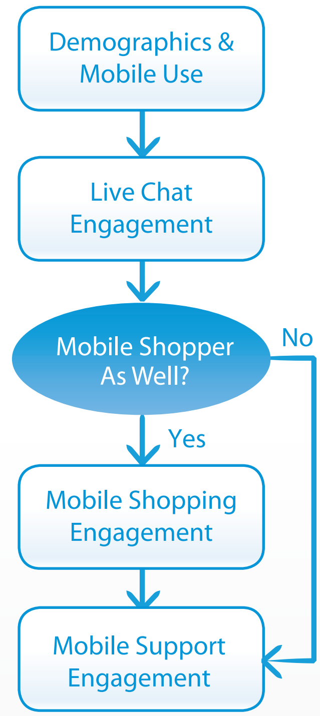

Figure 3: Survey Schematic

The instrument included several screening questions in order to validate country of residence, mobile device ownership and relevant mobile use. Only those respondents who indicated that they lived in one of the targeted geographies mentioned above, owned a mobile device, and used the device in either a shopping or support scenario at least occasionally were allowed to continue. All other respondents were terminated.

Qualifying respondents were required to answer all questions completely in order for the results to be counted among those reported here.

While the individual questions themselves were not randomized (i.e.: Q#7 for one respondent was the same as Q#7 for another), randomization was used inside the questions themselves. This measure was taken to mitigate order bias.

Conclusions

This inaugural report has uncovered five critical findings for businesses who want to better connect with their mobile customer base. While all the conclusions include lessons for businesses to improve their mobile strategies, the first should amplify any company's sense of urgency. That first conclusion, quite simply, is that mobile engagement is far more prevalent than businesses likely think it is; mobile engagement isn't something for the future, its time is now.

#1: Mobile Engagement is Flourishing

It would be hard not to observe that the consumer is tethered to their phones 24x7 and poised to embrace mobile contact. Indeed, the state of mobile engagement is very healthy with about half of the population engaging companies at least sometimes using their mobile device, and approximately 1 in 5 people engaging often or all the time while mobile. Mobile engagement, as well, is a multi-channel affair with five avenues of communication all experiencing regular use around the globe.

#2: No Mobile Engagement Strategy is Complete without Text-Based Channels like Chat

Live chat is more frequently used on mobile devices than we hypothesized and it's instructive to see that it is on par with other channels such as social media. In the US, for example, 57% percent of the US population says they frequently engage in chats from their mobile devices. Consistent with other research projects, this analysis also finds that about 1 in 5 people choose live chat as their preferred way to communicate with businesses while using their mobile device.

#3: Mobile Changes Everything

For engagements generally, and for specific engagement channels like live chat, the introduction of mobile changes what constitutes success or satisfaction. And they change in the same way, with every criterion across the board getting more important, not less. And, the relative order of their importance when mobile may change as well. In short, mobile engagement has operational considerations distinct from non-mobile engagement.

#4: High Frequency Shoppers and Technical Support Seekers Suggest Unique Considerations

Companies wishing to optimize their mobile engagement strategies should be aware of two interesting, and overlapping groups. People who often use their mobile device to seek technical support and those who use it regularly for shopping are certainly customers any company will encounter via mobile engagement with some frequency. These customers are more likely to use more mobile channels, and their mobile expectations are higher than the population at large. This segment is powerful and must be handled accordingly as their influence could be exponential.

#5: Support and Sales are Different

Mobile engagement is used for both support and sales scenarios, but there are important differences which can be instructive from an operational standpoint. Engagements happen in different places, at different times, and through different channels given the nature of the contact. More than 50% of mobile shoppers, for example, say that they most frequently shop on weekends or in the evenings – far higher than mobile users seeking support at these times. One similarity between sales and support, unfortunately, is the dismal ranking for mobile engagement satisfaction across both channels of contact and industries.

Detailed Conclusion Analysis

The remainder of this document concerns itself with a thorough investigation into each of the conclusions posited above. Here we present data and analysis from throughout the survey in support of each of the five statements.

#1: Mobile Engagement is Flourishing

Mobile engagement is prominent with approximately half of the population engaging companies at least sometimes using their mobile device and about 20% of people engaging often or all the time while mobile.

Engagement breaks down roughly into two types – commerce and support engagements. From left to right in Figure 4, the first five scenarios are considered support engagements and the final three are commerce, or shopping engagements. Throughout this report we will explore and refer to each of these engagement types with some regularity.

Where is Mobile Engagement Happening?

Mobile engagement is a global phenomenon, but there are interesting differences with some locations in the world being relatively more or less likely to engage companies from their mobile devices. Figure 5 presents only the respondents who engage most frequently when mobile, saying either 'often', or 'all the time,' for each engagement scenario.

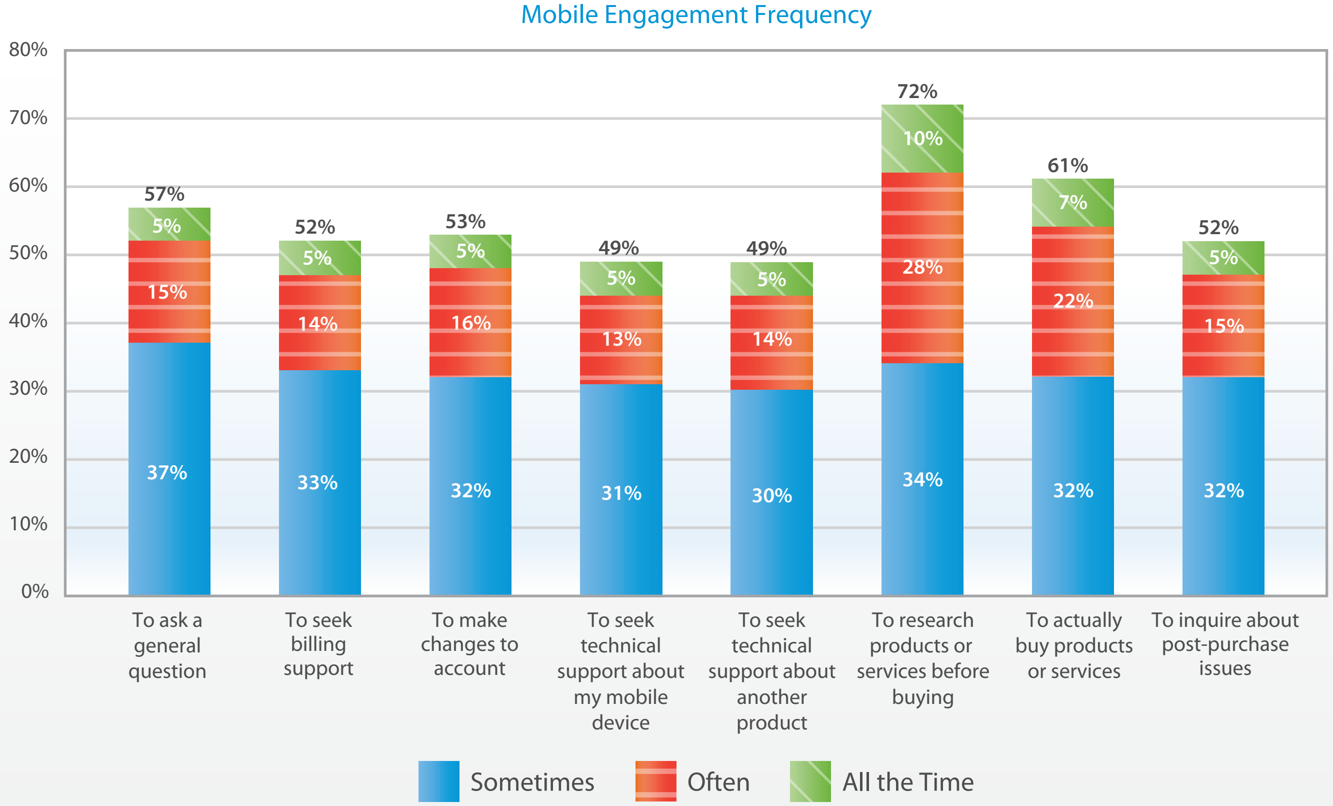

Figure 4: Mobile Engagement Frequency

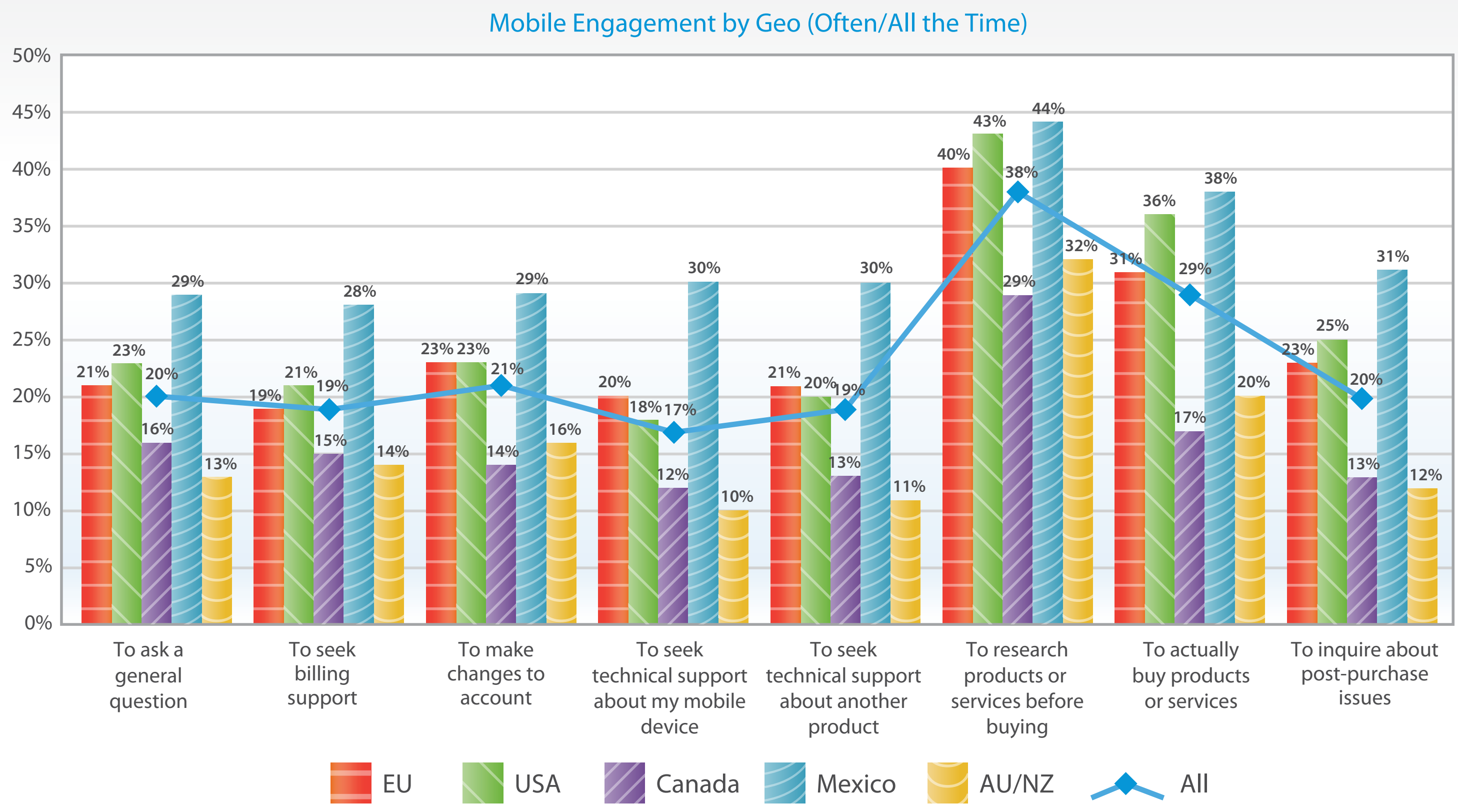

Figure 5: Mobile Engagement (Geo)

Mexico, the United States, and the E.U. are leading the way while Canada and Australia/New Zealand are lagging behind. Overall, and in each geography individually, we see that shopping scenarios (especially product research and actual buying) are the most likely types of frequent mobile engagements.

Who Engages While Mobile?

We were interested to see if there was a correlation between frequency of device usage and frequency of engaging companies using those mobile devices. Overall, 63% of the population indicated that they use their mobile device frequently throughout the day, every day. This "always-on" mentality can be seen in answers to our open-ended questions where the mobile user's preference is 24x7 access.

Somewhat surprisingly, women, who are more likely to be frequent users with 65% saying they use their device multiple times per day, every day, (vs. 61% for men) are slightly less likely to frequently engage companies from their mobile devices. We do see a strong correlation, however, when we examine usage and engagement by age group. Intuitively, younger respondents (those aged 21 to 40) are far more likely to use their device all day, every day.

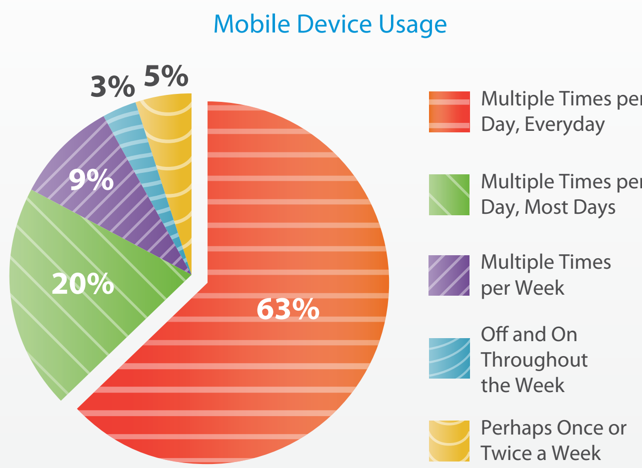

Figure 6: Mobile Device Usage

Frequent Mobile Device Users (Gender/Age)

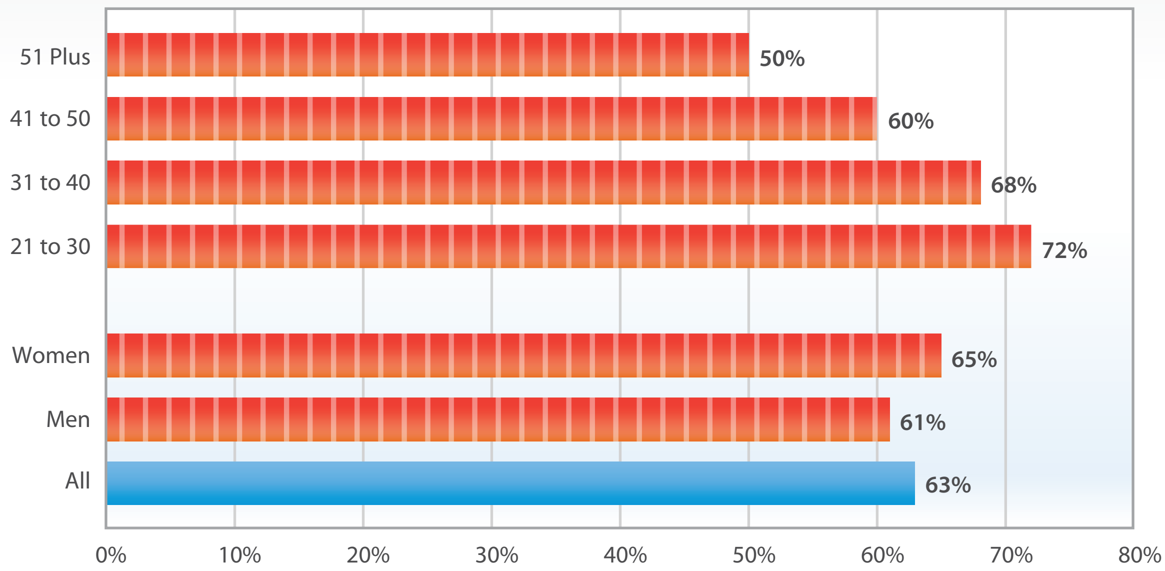

Figure 7: Mobile Device Usage (Gender/Age)

And younger respondents are also more likely to frequently engage businesses while mobile. You can see that, consistently across all scenarios, 21 to 30 and 31 to 40 year olds are more likely (by between 5 and 10 percentage points) to engage frequently when mobile.

Frequent Mobile Engagement (Often/All the Time) Gender and Age

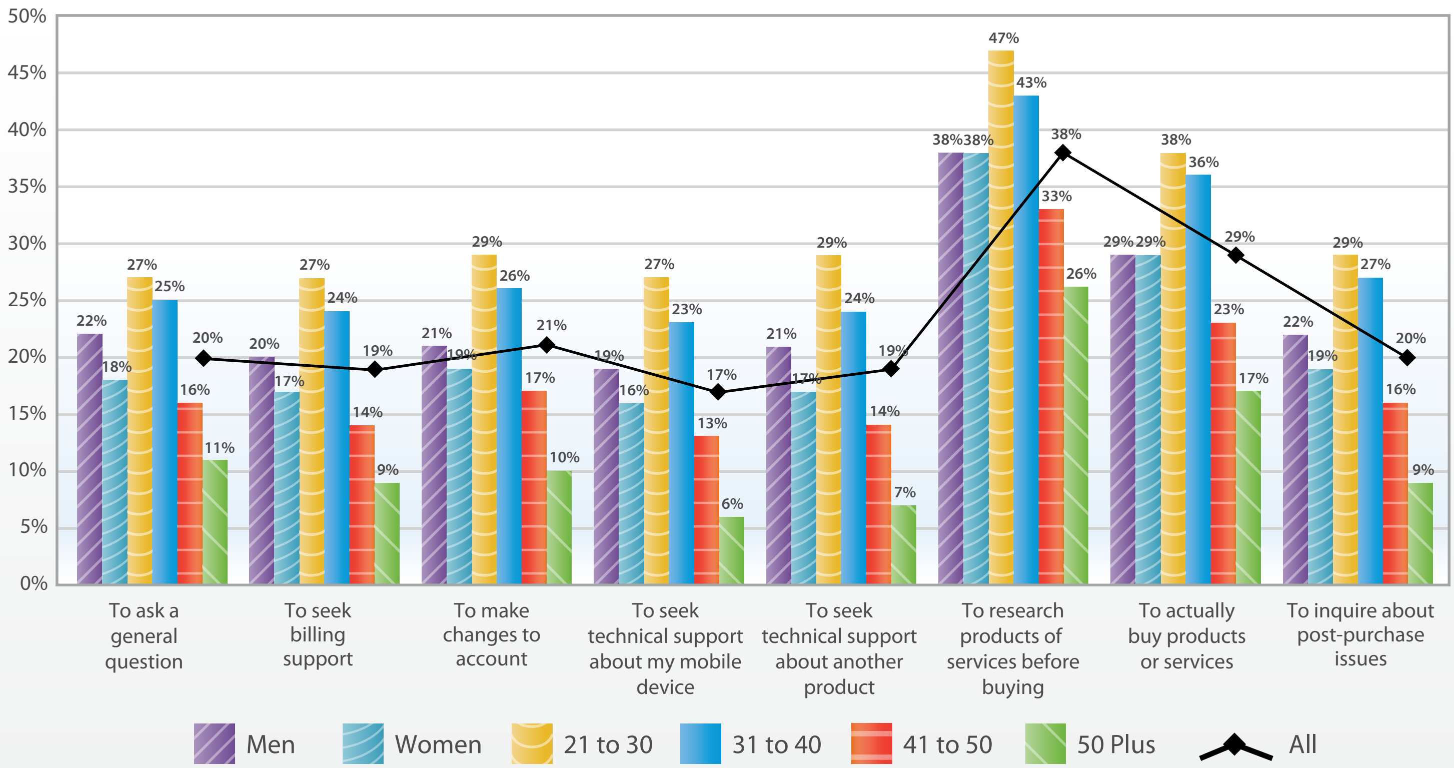

Figure 8: Frequent Mobile Engagers (Gender/Age)

Channels of Mobile Engagement

The form, or rather forms, of engagement is also an interesting finding from this research. Certainly, voice calls would be the expected leader, but other methods are also widely used in both shopping and support engagements.

Taking note of live chat's strength relative to text messaging and social media in many geos was an observation that ultimately factored into our conclusions.

Mobile Engagement Channels for Support by Geo

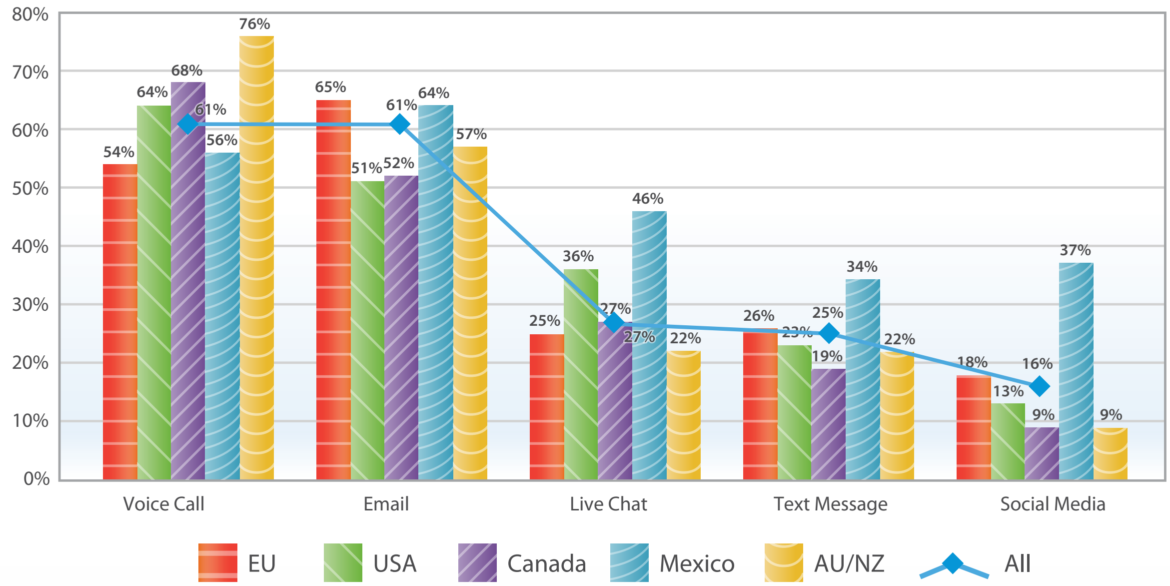

Figure 9: Support Mobile Engagement Channels (Geo)

Mobile Engagement Channels for Shopping by Geo

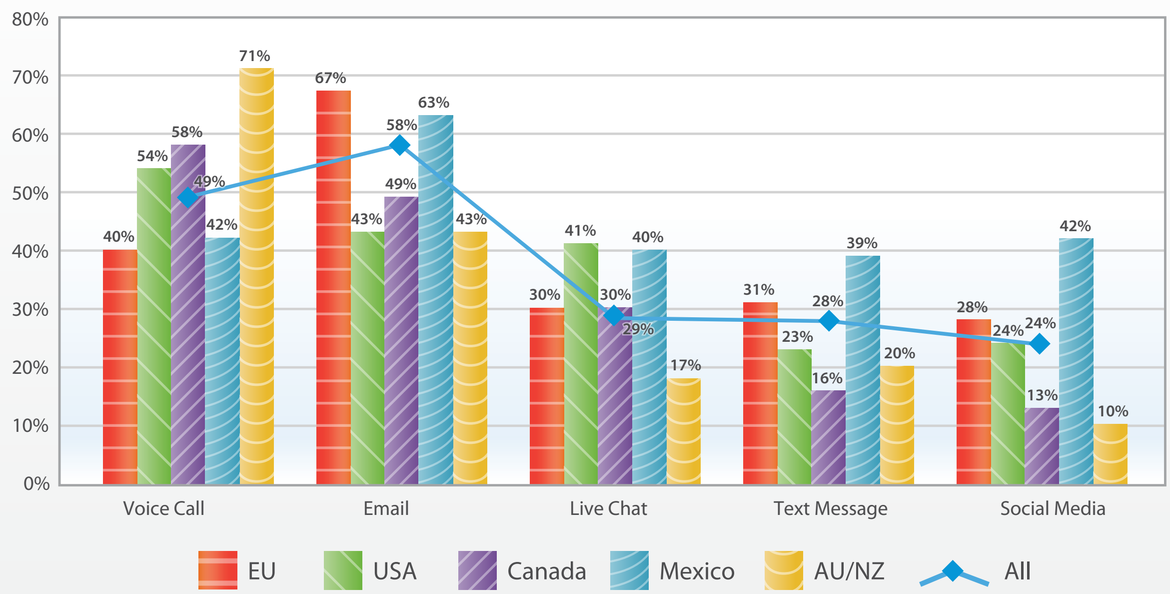

Figure 10: Shopping Mobile Engagement Channels (Geo)

Respondents were asked to indicate the ways in which they've contacted businesses using their mobile device and while calling was selected a large percentage of the time; it was not the far and away winner. In fact, when looking at the entire sample, it tied email for support engagements (61%) and was bested by email for shopping-oriented engagements (49% vs. 58%). Other engagement channels like text messages, live chat, and social media were surprisingly high with between 16% and 29% of the population saying they'd engaged with firms using these methods. Not surprisingly, there are geographic differences as well. Texting engagement was statistically higher in the E.U. and Mexico and lower in the US, Australia/New Zealand, and Canada. Live chat was higher in the US and Mexico, while email, especially for shopping engagements, was very high in the E.U. In open-ended responses some consumers emphasized the cost of making calls as part of an ideal mobile engagement which further contributed to their desired brevity in communication time.

On a global basis, mobile engagement is flourishing not only in depth – the amount of the population connecting with companies when mobile, but also in breadth as customers use a variety of mobile channels to engage with companies.

"On a global basis, mobile engagement is flourishing not only in depth – the amount of the population connecting with companies when mobile, but also in breadth as customers use a variety of mobile channels to engage with companies."

#2: No Mobile Engagement Strategy is Complete without Text-Based Channels like Chat

While mobile engagement overall is highly penetrated – perhaps more penetrated than businesses have thus far imagined – the broad use of mobile text-based channels is surprising. As we've just seen, channels such as email, live chat, and SMS texting are rivaling or surpassing mobile calls in countries all over the world. Live chat, in particular, is more frequently used on mobile devices than we hypothesized. Among the entire universe (see Figure 11):

- 37% of respondents indicated that they frequently or very frequently engage with companies via live chat on a mobile device,

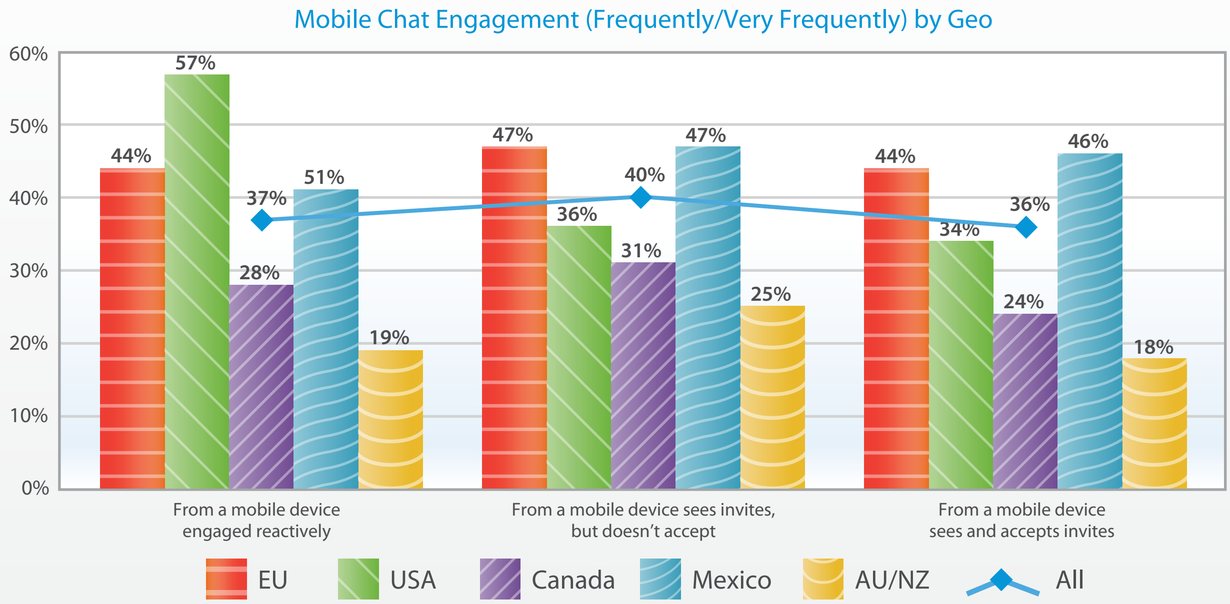

Figure 11: Frequent Mobile Chat Engagement (Geo)

• 40% said they'd been proactively invited into a chat conversation while mobile,

• and a startling 36% said they'd been proactively invited while mobile *and* accepted the invitation to chat.

In certain geographies, chat's use is even broader.

In the E.U., the United States, and Mexico, mobile chat – including mobile proactive chat – is in frequent use with, for example, up to 57% percent of the US population saying they frequently engage in chats, with companies, from their mobile devices.

In previous research projects, live chat has been shown as a preferred communication channel by ~1 in 5 regular online shoppers. The global statistic, at last measure, was actually 17% in 2013[3]. We find now that roughly the same percent of the population chooses live chat as their preferred way to communicate from their mobile devices. Once adopted, these preferred means tend to remain their channel of choice over time. Further, we find that it's not just shoppers who prefer to chat at this rate, but those seeking support as well.

• Out of the total universe, 16% chose live chat as their #1 contact method for *either* shopping or support engagements.

• Among regular mobile shoppers (those who use mobile devices to research and buy products often or all the time), 18% pick chat.

• Among regular mobile support seekers (those who seek support from mobile devices often or all the time), 17% pick chat.

Proactive chat, the issuance of rules-based invitations in order to offer someone the opportunity to engage in a chat, is a hotly debated practice. In the previous shopper research mentioned above, receptiveness to proactive chat was measured for four consecutive years. On a 1 to 5 scale, where 1 is "annoyed" and 5 is "happy to know help is available", shoppers in 2013 were 64% receptive (3, 4, or 5) to the practice. In this new mobile engagement project, we find that 73% say the same, with wide variation by geography:

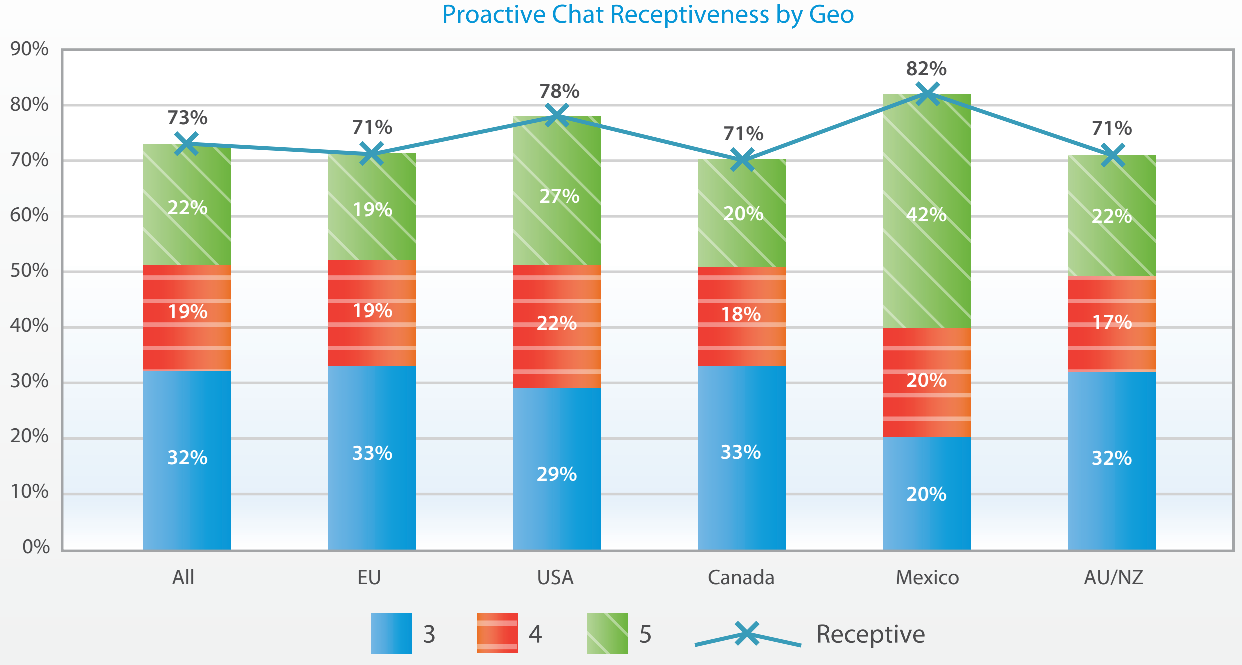

Figure 12: Proactive Chat Receptiveness (Geo)

3. Ibid

Receptivity is highest in Mexico and the United States and lower, but still high, in the other parts of the world. What's especially interesting, however, is that the majority of respondents change their answer if you ask them to consider being proactively invited to chat while on a mobile device. That the device upon which an invite appears would change someone's reaction brings us to the third conclusion of this research.

#3: Mobile Changes Everything

Recall that 73% of respondents indicated across the board receptivity to being proactively invited to chat. We then asked the question again, inquiring if receiving an invite on a mobile device would change their reaction. 41% of the universe said their reaction wouldn't change. What this means is that for the majority of the population, 59% in fact, the use of their mobile device changes their reaction to being proactively invited.

Reaction to Proactive Invitations if Mobile

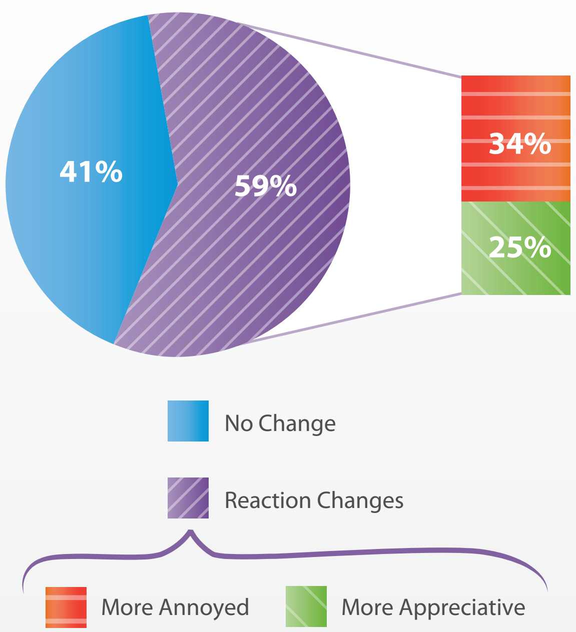

Figure 13: Proactive Receptivity (Mobile)

For a quarter of the population, being mobile improves their perception – they become more appreciative – while for about a third of the sample it would make them more annoyed. Proactive chat is an optimization science which many practitioners have honed for over a decade. What this finding implies is that the proliferation of mobile has changed what we think we know about engagement, especially proactive engagement and its upside opportunity. And it doesn't end there.

The determinants of a support engagement's success also change when respondents engage from a mobile device. In a similar line of questioning to the proactive analysis above, we asked respondents who indicated that they at least sometimes use their mobile device to contact a business for some kind of support-related scenario (74% of the total sample), what factors are important to determine a support engagement's success. We then asked if the importance changed if that engagement were happening on a mobile device. And again we find that the importance does change, for about half the respondents – and in this case, overwhelmingly, that it becomes more important, not less.

> *"Proactive chat is an optimization science which many practitioners have honed for over a decade. What this finding implies is that the proliferation of mobile has changed what we think we know about engagement, especially proactive engagement and its upside opportunity. And it doesn't end there."*

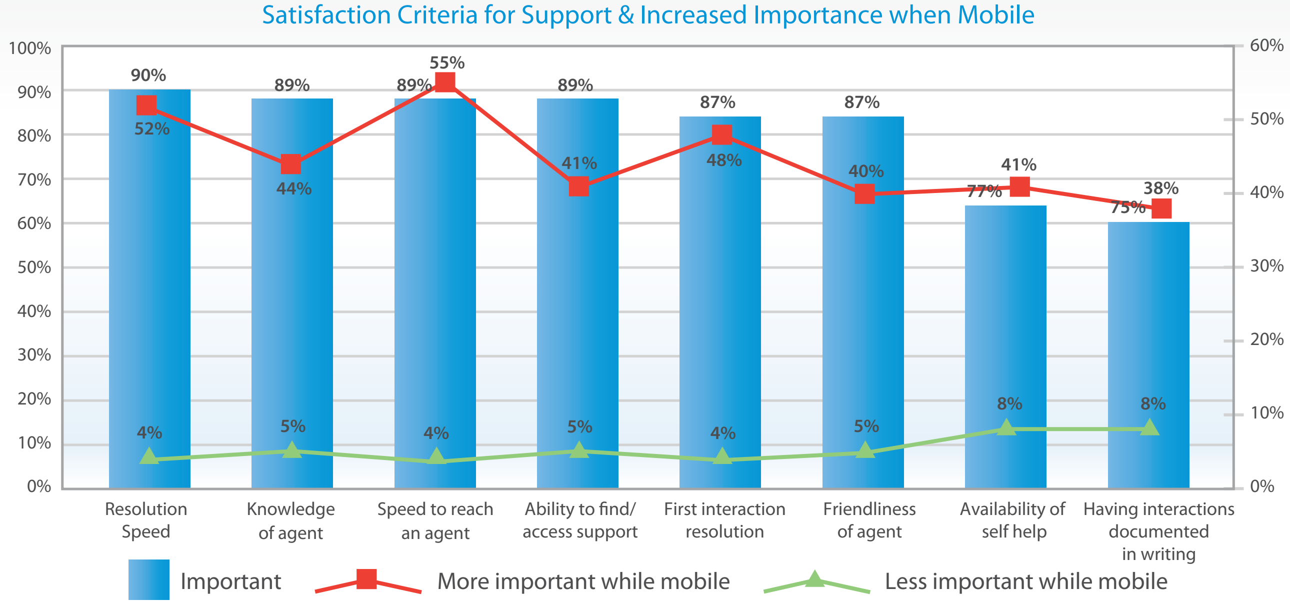

Figure 14: Support Engagement Satisfaction Criteria / Changes While Mobile

What is interesting about this analysis is that intuitively we might expect the most important criteria before the "what if mobile?" question to follow the same prioritization after it – that those most important criteria would simply become the leaders in the "more important" contest. But they don't. The criteria which ranks highest for being more important while mobile is the "Speed to Reach an Agent" where previously it was "Resolution Speed". Similarly, "First Interaction Resolution" ranked 5th before the mobile curve-ball, but took a third place ranking in becoming more important while mobile.

Without exception all the criteria are important in determining support engagement success, and they all become even more important when customers engage via mobile, but to varying degrees. From a customer engagement standpoint, then, mobile is a game changer; it amplifies the importance of superlative execution across the board and heightens the mission-critical nature of certain operational levers. And the same is true if you explore the success determinants of one particular mobile engagement method – chat.

The entire universe was queried about the importance of certain factors in determining a live chat session's success and, in similar fashion to the support line of questioning delineated above, the findings are analogous.

> *"From a customer engagement standpoint, then, mobile is a game changer; it amplifies the importance of superlative execution across the board and heightens the mission-critical nature of certain operational levers."*

We see, again (Figure 15), that being mobile makes almost nothing less important, with the possible exception of agent grammatical correctness. All the remaining factors become more important for about half the respondent pool, and in an inconsistent way; meaning that the most important factors, sans-mobile, don't necessarily line up in the same order when the respondents considered live chat engagements with mobile. The message is that to please customers chatting with you from mobile devices, you have to do things differently than with your customer chatting from their computers.

For example, notice that agent speed, brevity, and chat window accessibility get more important for mobile

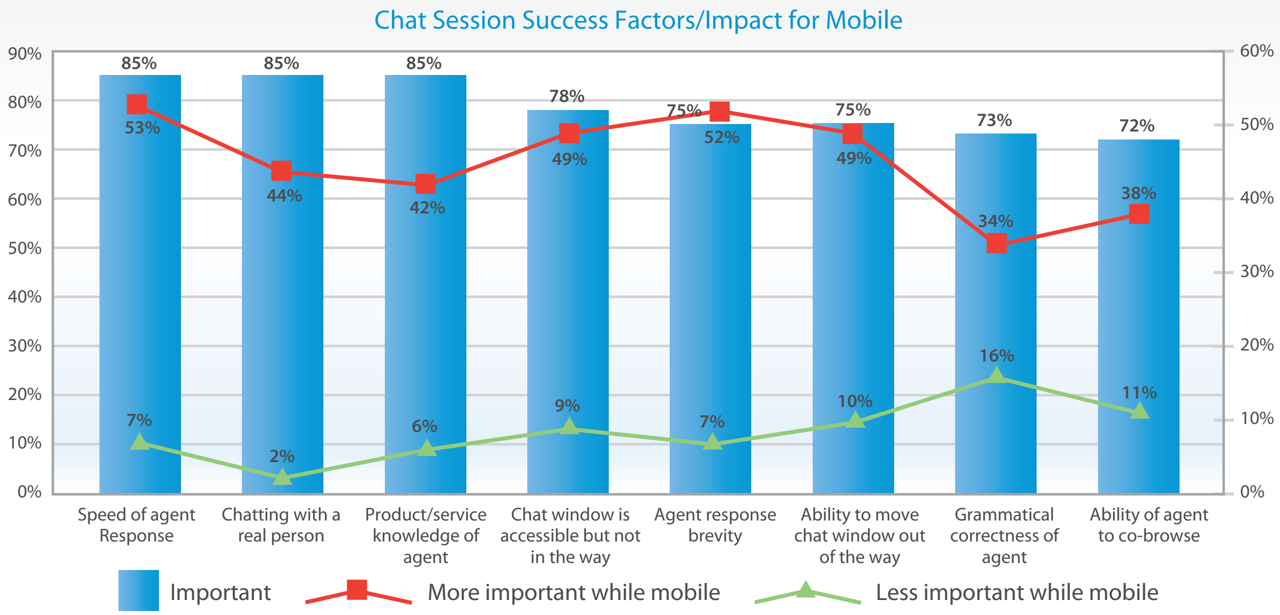

Figure 15: Chat Session Success & Mobile Impact

engagers, in that order. These findings have technology implications which any business thinking about mobile live chat should strongly consider. For example, chat window rendering, user-controlled minimization, and message waiting alerts are just some of the ways to address the increased importance of chat window accessibility when chatting from mobile devices.

And while technology considerations are one lesson from these findings, they are certainly not the only takeaway, nor the most significant. What these results show, en masse, is that the operational aspects of mobile engagement, from the very perspective of those that businesses would want to engage, are different then when engaging someone when they are not on a mobile device. And, not only is it different, it's harder.

And for certain groups of mobile users – desirable ones in fact – it's harder still.

#4 High Frequency Shoppers and Technical Support Seekers Suggest Unique Considerations

The research has revealed two groups of mobile users deserving of special attention. These groups are:

- Frequent Mobile Shoppers: respondents that indicated they frequently ('often' or 'all the time') research products/services from their mobile device and just as frequently actually purchase goods/services from their device. There were 1,394 such persons, or 24% of the sample.

- Frequent Mobile Technical Support Seekers: respondents that indicated they frequently ('often' or 'all the time') sought technical support from their mobile device for something in their home or for their device itself. There were 1,296 of these people, or 22% of the sample.

These groups, as we will see, are both demographically and psychographically different from the entire sample in some intriguing ways. Additionally, these two groups are similar to each other. This latter detail may lead one to believe that the groups are the same; that frequent mobile shoppers are also frequent mobile technical support seekers. And there is overlap, but it's not 100%. The overlap is, in fact, about 60% which means that a frequent mobile shopper has a 60% chance to also be a frequent mobile technical support seeker, and vice-versa.

Readers may question why two groups, each constituting only about a quarter of the entire surveyed population, are worthy of dedicated exploration. The reason is simply because, for companies interested in connecting with their customers via mobile engagement channels, it is from these two groups that the customers will most likely come; these are the frequent engagers, these are the heavy users.

Demographic Profile

Demographically, mobile technical support seekers are more likely to be men while mobile shoppers split right down the middle. Both groups skew younger, better educated, and more affluent. There are geographic differences as well. (see Figure 17)

Members of each group are more likely to reside in the E.U. or Mexico and much less likely to reside in Canada or Australia/New Zealand. Frequent mobile shoppers are slightly more likely to live in the United States.

Engagement Patterns

Not surprisingly, each group is more likely to be a very frequent mobile device user, saying they use the device multiple times per day, every day. Of the entire universe, 63% indicated this usage pattern while mobile technical support seekers landed at 69% and mobile shoppers at 75% - a full twelve percentage points higher than the sample at large. There is learning among these mobile masters and one can only surmise that mobile usage will continue to accelerate at faster rates within these segments.

Demographic Profile of Mobile Tech-Support Seekers/Shoppers

	All	Mobile Tech Support Seekers	Mobile Shoppers
Gender			
Male	50%	56%	50%
Age			
21-30	25%	38%	32%
31-40	27%	35%	34%
21-40	52%	73%	66%
Education			
College	26%	24%	24%
Some Post Graduate	19%	21%	20%
Master's Degree	18%	25%	23%
Doctorate, Law or Professional Degree	6%	7%	8%
College Educated or More	69%	77%	75%
Income			
\$75,001-\$100,000	19%	19%	20%
\$100,001-\$150,000	12%	12%	13%
\$150,001-\$200,000	4%	5%	5%
\$200,000+	3%	4%	4%
\$75,000+	38%	40%	42%

Figure 16: Demographic Profile (Support Seekers/Shoppers)

Mobile Tech Support Seekers/Shoppers by Geo

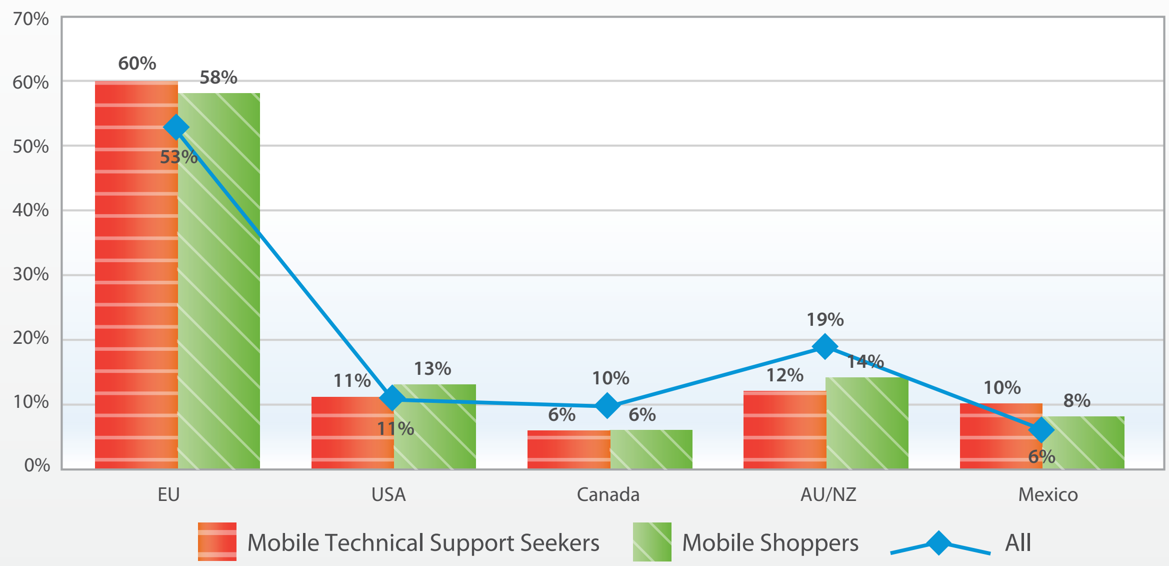

Figure 17: Mobile Tech Seekers/Shoppers (Geo)

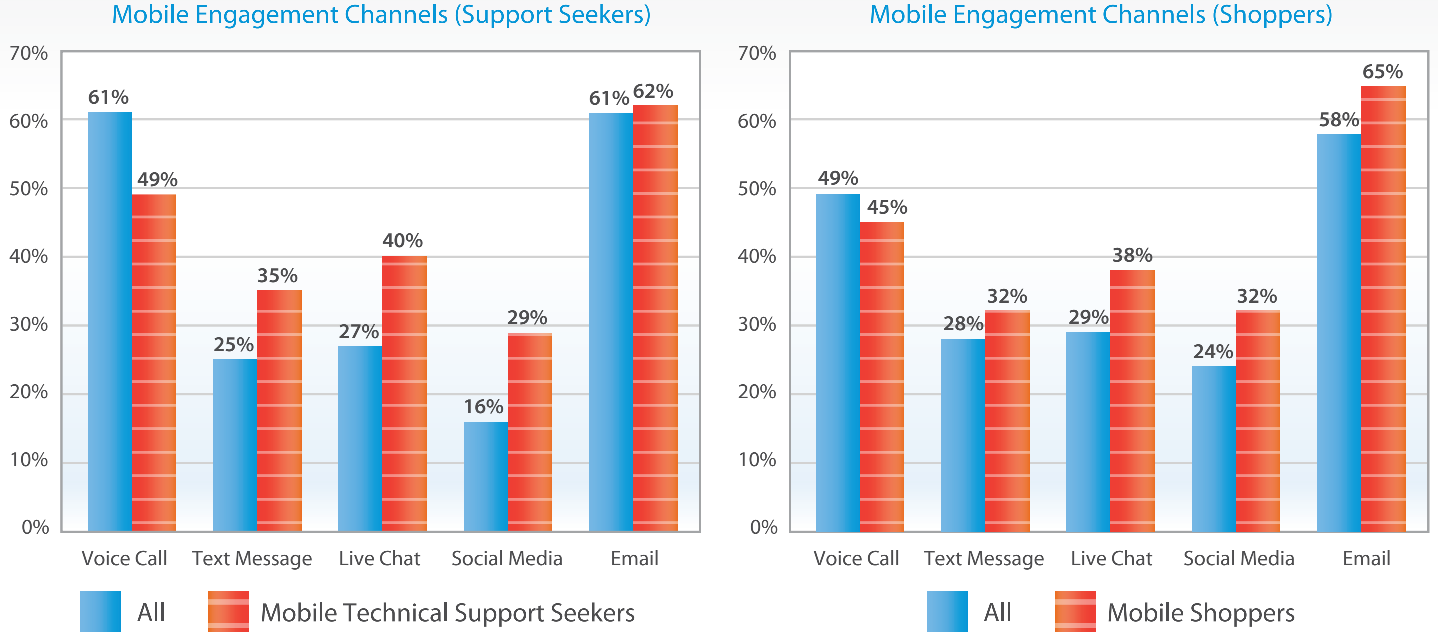

Figure 18: Mobile Engagement Channels (Tech/Shoppers)

Both groups have far more experience with the breadth of mobile engagement channels as well. (see Figure 18)

Each group is less likely to have called a business for either type of engagement and they are much more likely than the entire sample to have used other channels, especially chat. 40% of mobile support seekers and 38% of mobile shoppers, for example, said they have engaged with companies via live chat versus 27% and 29% respectively for the whole population.

And speaking of live chat, both the frequent mobile technical support seekers and shoppers are far more likely to have had experience with chat and to be receptive to proactive chat invitations.

Those who use their mobile devices to frequently seek technical support have engaged in chats on those devices at nearly two times the rate of the population as a whole. Shoppers also engage at increased rates. (see Figure 19)

Recall that 73% of the population indicated receptiveness to being proactively invited to chat. Tech support seekers and frequent mobile shoppers are 81% and 83% receptive, respectively.

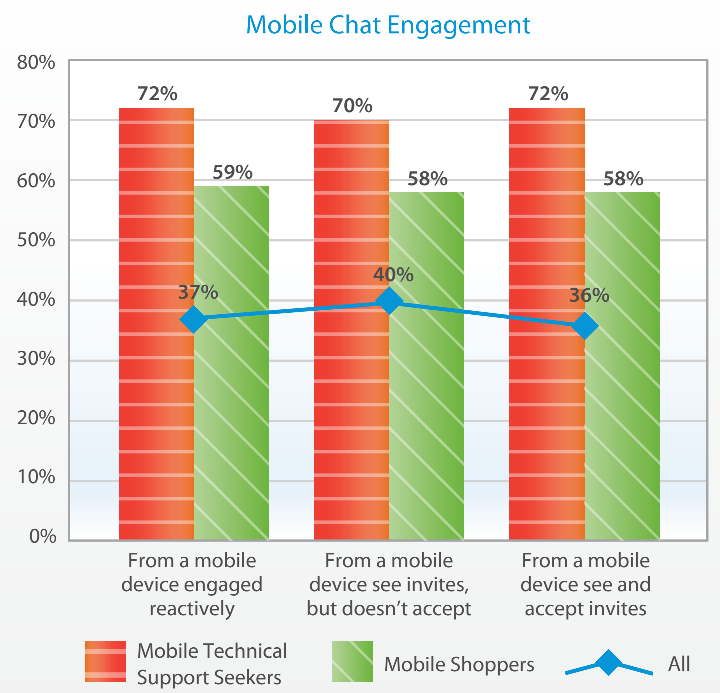

Figure 19: Mobile Chat Engagement (Tech/Shoppers)

These two groups also exhibit differences in channel preference compared to the entire population.

Mobile Engagement Channel Satisfaction (Sales vs. Support)

	Email	Voice	Live Chat	Texting
Mobile Tech Support	#1	#2	#3	
Entire Population of Tech Support	#2	#1		#3
Mobile Shopper	#1	#2	#3	
Entire Population of Shoppers	#1	#2		#3

Figure 20: Mobile Channel Preference (Shoppers/Support Seekers)

For each of these demographically attractive groups, we see a breadth of mobile channel use and in particular higher use, preference, and receptivity to live chat.

For each of these demographically attractive groups we see a breadth of mobile channel use and in particular higher use, preference, and receptivity to live chat.

Mobile's Impact on Success/Satisfaction

We also see that for the two groups in question, being mobile has a greater impact on the determinants of a chat session's success. Similarly, we see the same phenomenon for the determinants, in general, for support-engagement satisfaction. From a chat perspective, both the mobile tech support seekers and shoppers ranked almost all the elements as more important than the population at large (lines below in Figure 21) but the biggest differences (up to 22 percentage points, in fact) come when the mobile factor is considered (bars in Figure 21); each group indicates that being mobile makes the criteria far more important.

Chat Session Success Determinants/Changes when Mobile

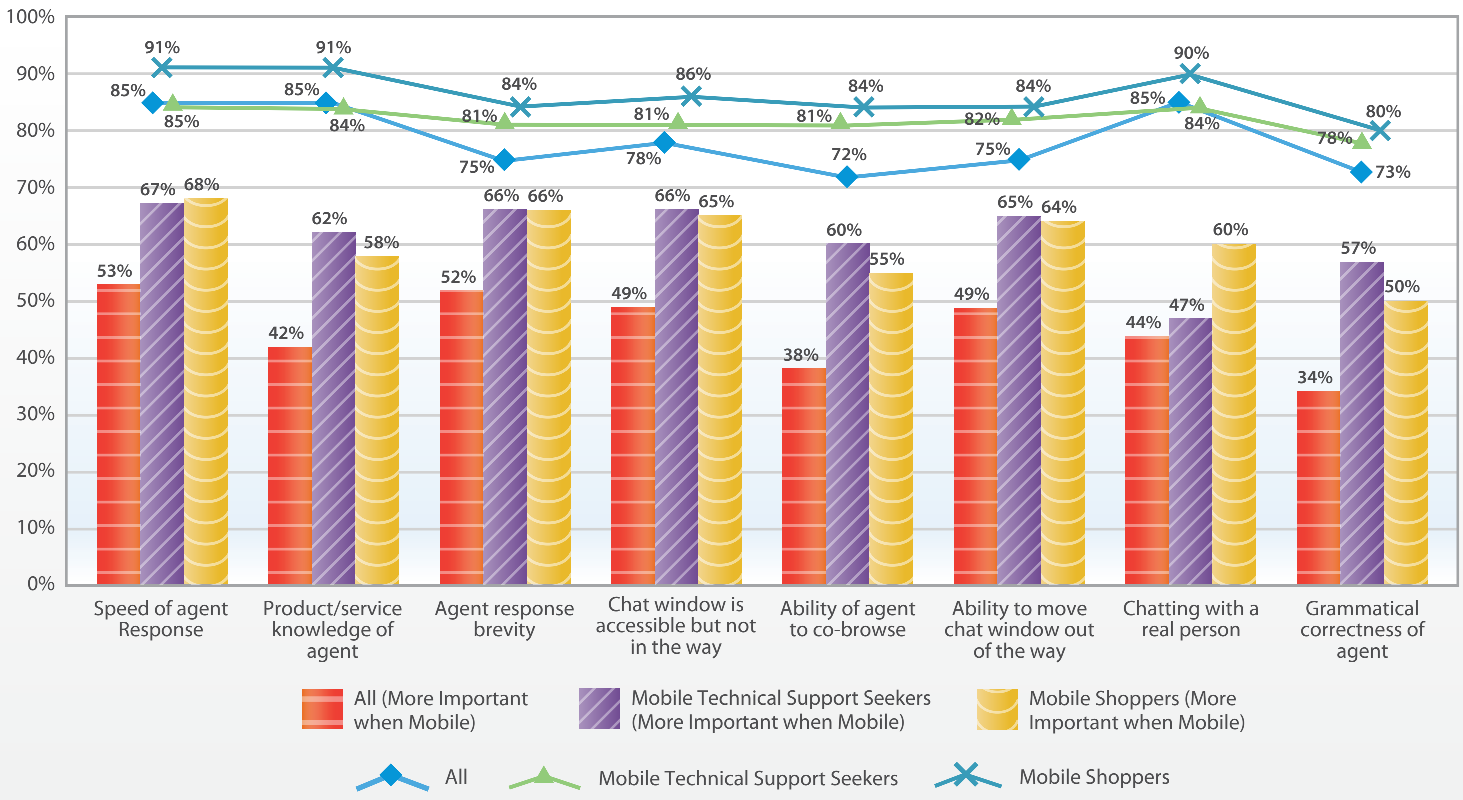

Figure 21: Chat Session Determinants and Changes

Among the two groups there are some interesting differences as well – for instance, note how important chatting with a real person is to the mobile shopper, and how much more important it becomes if the chat occurs when mobile. This too was revealed and reinforced in the open-ended responses with an emphasis on agents that spoke their native language were both expected and appreciated. Engagement speed, friendliness, and politeness were all noted by respondents, but the knowledge of agents was seen as paramount. Resolution speed was also referenced repeatedly as was solving desired issues within one engagement.

Among tech support seekers we see about the same phenomenon. Before the concept of mobile engagement is introduced, the tech support seekers generally agree with the general population that all the criteria are important for a support engagement to be satisfactory. The ability to find self-help and having interactions documented are statistically more important for the technical support seeking group. More significant differences are seen when the respondents are asked to consider support interactions occurring on a mobile device. In this case, the differences are dramatic with each criteria being between 11 and 23 percentage points higher for the tech support seekers. (Bars in Figure 22)

This analysis of two sub-groupings is instructive for companies wanting to improve their mobile engagement strategies, especially with a demographic that skews younger, more affluent, and better educated. What we have seen is that for those who use their mobile device to regularly shop or seek technical support, they are far more likely to engage across a swath of channels, especially live chat. And when they engage, the fact that they do so via mobile, amplifies the importance of success and satisfaction metrics across the board. Attention spans are likely shorter while expectations remain higher. In short, the most likely

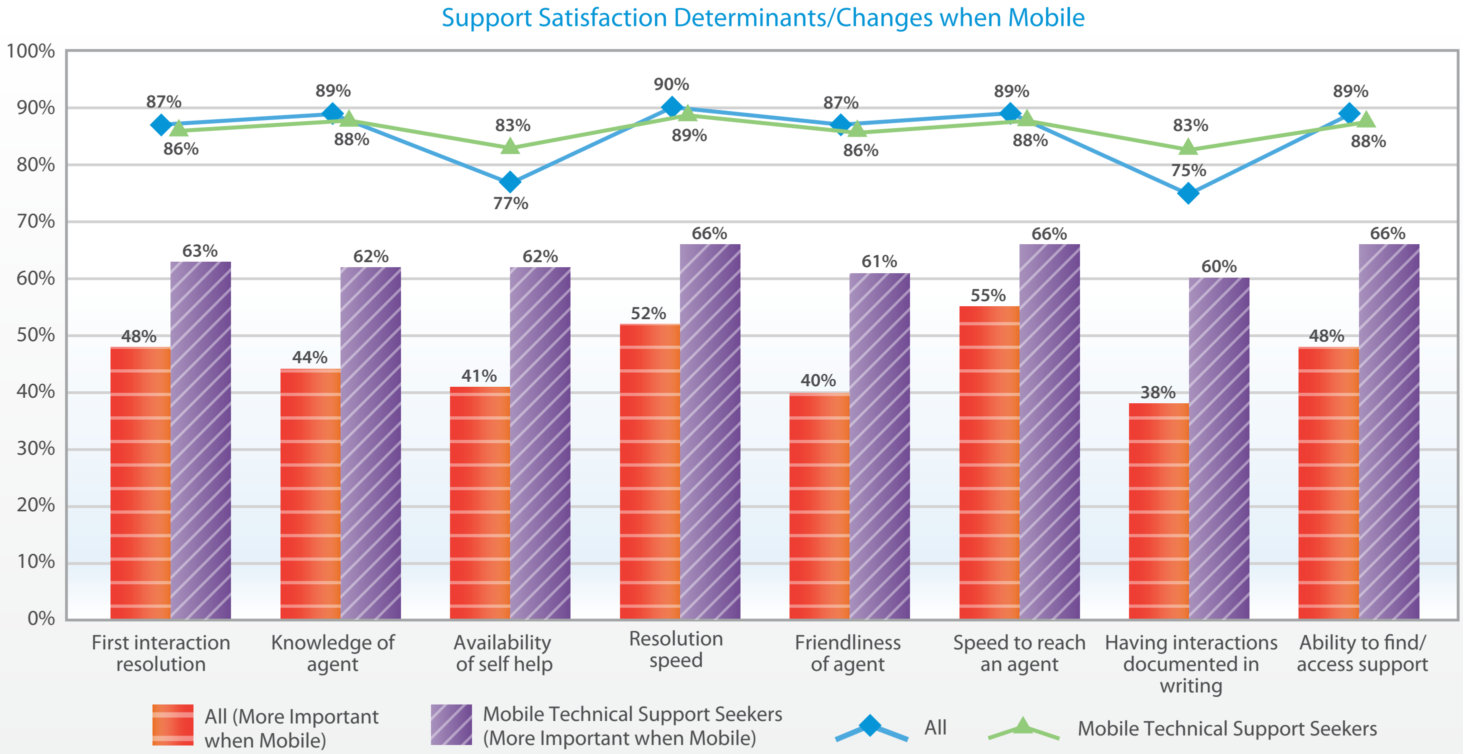

Figure 22: Support Satisfaction Determinants/Changes when Mobile

people to engage businesses while mobile will do it across channels, and have higher expectations no matter which one they choose.

#5: Support and Sales Are Different

The findings above, given the similarities between the tech-support seekers and frequent shoppers, may lead readers to conclude that the operational considerations of mobile needn't distinguish between them. But that view is errant as mobile engagement for sales is distinct from mobile engagement for support.

The goals of a sales or support mobile interaction, from a business perspective, are likely to be different anyway, but this research concerns itself more with the mechanics of engaging with mobile users. And what we find is that the techniques of those engagements can be optimized depending on the target. Some important differences between shopping and support scenarios can be seen in mobile interaction location and time of day.

Support seekers are far more likely to engage on a mobile device from their homes and slightly more likely to do so from work. Shoppers are more likely to engage on mobile devices while outside the home, including 1 in 5 who do so while at a retail location. The engagement implication of this finding – especially considering proactive chat engagement – is potentially instructive.

It should be noted that the previous question was posed as a percentage distribution question, asking participants in each group (shoppers and support seekers) to distribute 100 points amongst the choices. The results in Figure 23 are summative. We then asked a more restrictive question, forcing participants to choose the one time of day they most frequently engage from mobile devices.

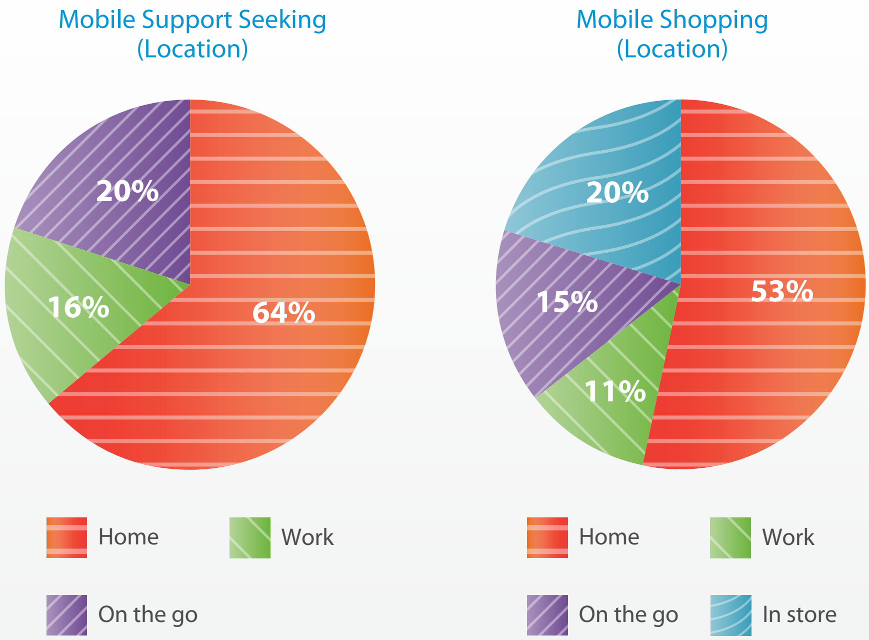

Figure 23: Mobile Engagement Location (Support vs. Sales)

Mobile Engagement Time of Day

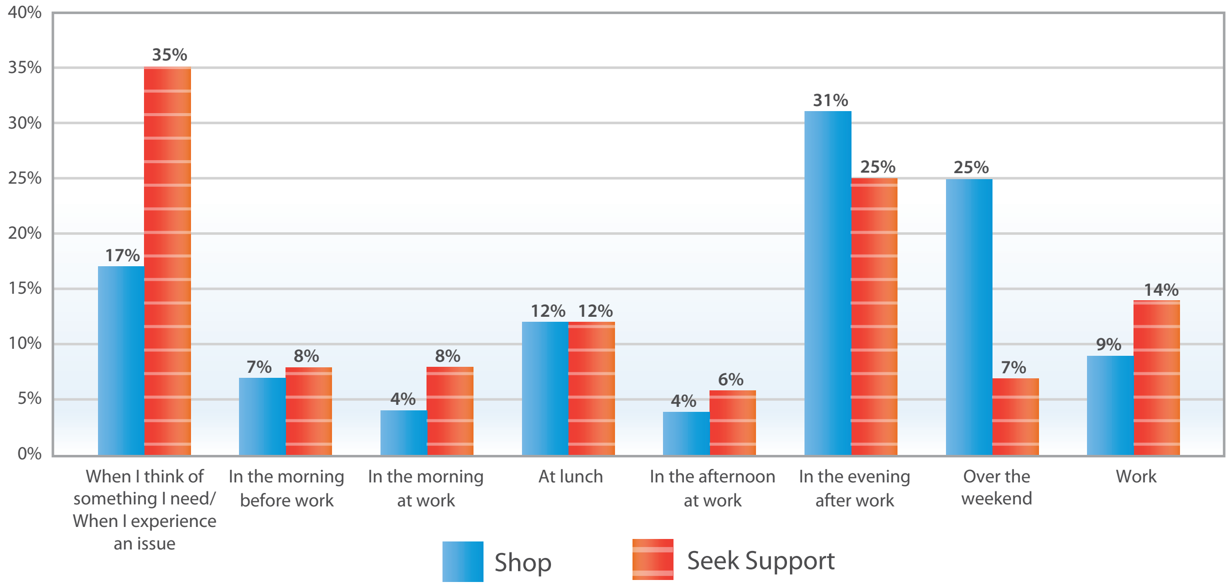

Figure 24: Mobile Engagement Time of Day (Sales vs. Support)

Support seekers, almost certainly owing to the fact that they very well may be seeking support for a device at their place of employment, are more likely to seek support during work hours. They are much less likely, by three-fold, to do so over the weekend. Thinking only about channel availability, this finding is insightful for companies both from a sales and support point of view. Consider, for instance:

- Enabling and staffing for evening and weekend mobile engagement is far more important, if not outright table-stakes for internet retailers. More than 50% of the sample said these times are those when they most frequently shop using their mobile devices.
- As support seekers are more likely to seek support during work hours, more discreet channels, like live chat, email, and texting should be added to the mobile engagement mix.

Mobile engagements for sales and mobile engagements for support are slightly different when it comes to channel preference.

Mobile voice calls are the preferred method for support seekers, while mobile email is the channel of choice for shoppers.

Mobile Channel Preference (Sales vs. Support)

Preferred Mobile Contact Method	Sales	Support
Email	1	2
Voice Call	2	1
Text Message	3	3
Live Chat	4	4
Social Media	5	5

Figure 25: Mobile Channel Preference (Sales vs. Support)

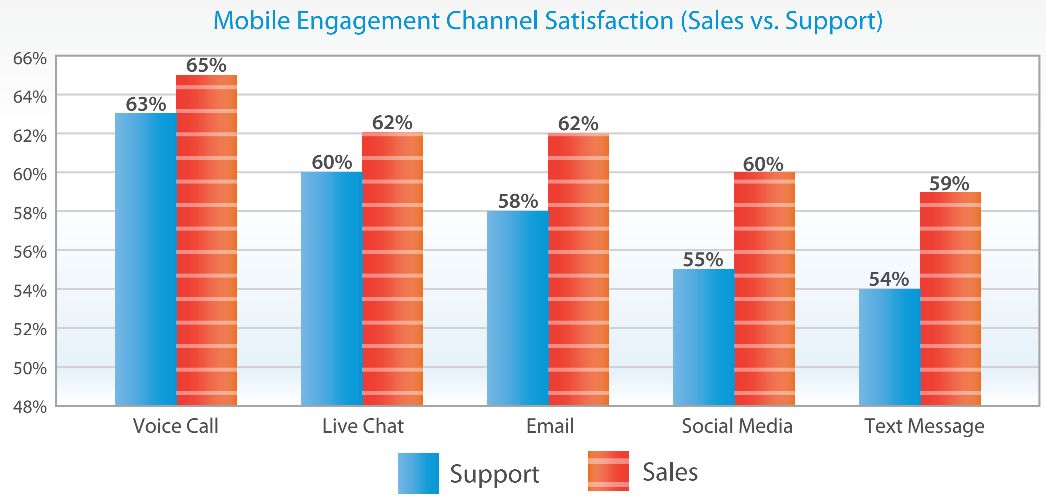

Figure 26: Mobile Engagement Channel Satisfaction (Sales vs. Support)

And while there is disagreement about the most preferred mobile engagement technique, there is, disappointingly, wide agreement about their quality. We asked respondents – both those that have had mobile sales engagements and those having mobile support engagements to tell us what channels they've used from their mobile device and then, how satisfied they were with those engagements.

Looking only at the scores for "Satisfied and Very Satisfied" (see Figure 26), we see that in both mobile sales and support engagements, that the scores across channels are poor – no business can succeed by only satisfying 65% of their customers. While we would expect mobile support interactions to be lower than eCommerce interactions, neither of them are very good.

Disillusioned with the results, we sought to understand if what we are seeing is an industry phenomenon; are one or more industries/verticals responsible for the abysmal showing? We know that the mobile sales engagements occur with retailers and/or pure-eCommerce firms so we looked just at the mobile support engagement numbers. In this case, we ignore engagement channel and look only at overall satisfaction, regardless of contact method.

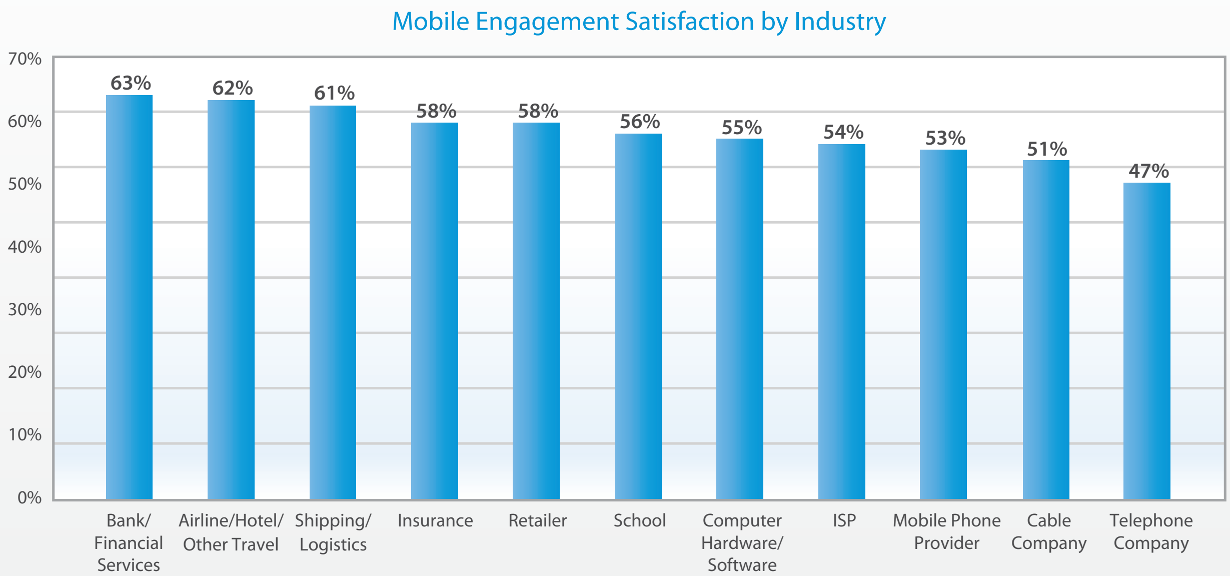

Figure 27: Mobile Support Engagement Satisfaction (Industry)

Unfortunately, the picture doesn't get any prettier; despite the proliferation of, and opportunity inherent in mobile engagement, satisfaction across both channels and industries is depressingly low.

Conclusion/Next Steps

We set out on this research endeavor to answer some questions – hoping that our answers would provide guidance to businesses that care about mobile engagement. Some of the questions we asked and answered are:

Q: What is the current state of mobile engagement?
A: Far more than we realized, across channels, and especially prolific for some groups of consumers.

Q: With what industries are they engaging and are those industries doing it well, from the consumer's perspective? Are there distinct differences by industry?
A: With every industry, and no, they aren't doing that well. Yet.

Q: Are there unique differences between engaging for technical support vs. engaging during a shopping experience? Are the differences owing to the situation, or the person who engages, or both?
A: There are differences, and they are important ones. The differences are due to both the situation, resolution requirements and the person. That's not a simple answer, but it's the truth.

Q: Does engagement, simply by the nature of occurring while mobile, change someone's view of what makes an engagement successful or satisfactory?
A: Yes. Unequivocally, yes.

As with any research project, this simply leaves us with more questions. Questions like:

1. Will consumers shift among engagement channels or become loyalists to one?
2. Will chat and text-based channels gain greater traction with the mass audience and across the world?
3. Will satisfaction scores improve? Which verticals will lead the way?
4. What can companies do to live up to the increasing expectations of their customers? Is there any way to wow them anymore?

“Unfortunately, the picture doesn't get any prettier; despite the proliferation of, and opportunity inherent in mobile engagement, satisfaction across both channels and industries is depressingly low.”

BOLDCHAT©, by LogMeIn

BoldChat©, a LogMeIn product, is a market-leading live chat and customer engagement solution that helps businesses quickly and effectively engage customers across online, mobile and social channels. Offered in different editions, BoldChat© includes integrated multi-channel customer communications technologies like live chat, click-to-call, co-browsing, email management, SMS management, and Twitter management, giving customer service teams a single solution for managing customer conversations. As a result, organizations of all sizes – from small proprietorships to large e-Commerce enterprises – can increase conversion rates and boost customer satisfaction across all of their online channels.

For more information:
Phone: **(866)753-9933**
Email: **info@boldchat.com**

Chat with us, start a trial or download more resources like this one at: **www.BoldChat.com**

BoldChat© is a member of the LogMeIn suite of solutions, for more information, please visit **www.LogMeIn.com**