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Foreword:
By Lauren Freedman, President, the e-tailing group

Chat is Mission Critical: Chat Fans Favorable for Retailers
Urgency is the operative word for today’s consumer as they continue to look for ways to shop smarter, find answers quickly and solve routine problems in seconds. Multi-tasking is core to these activities as the pace of life accelerates and a path containing chat becomes both commonplace and highly satisfactory. Consumers are inundated with retail choices and subsequent support with 24x7 access requiring more expanded service options than ever before. You just might say shoppers are on a mission. They seek out experiences that are efficient and effective. Potentially all interactions may be multi-faceted ranging from problem solving to procuring product information. While the consumer path to chat is often a journey, most roads appear to lead to customer satisfaction.

My own recent experience with chat exemplifies these sentiments and I believe that sharing it should resonate with retailers and consumers as we often wear both hats. Having just returned from IRWD, I was getting ready to go on vacation and had ordered 3 books on Hawaii for my daughter. Initially, I tracked the purchase and found that they were delivered but never received. I quickly jumped on Amazon and when drilling down into customer service options eventually was given 3 support options. At that point, somewhat frustrated, I now could choose between email, call or chat and I knew there was only 1 choice that interested me at 9 p.m.: Click to Chat. Similar to the shoppers we surveyed in this year’s Effectiveness of Live Chat Technology study, I remembered having used chat many times in the past mostly being satisfied with the results. With that in mind I started chatting in hopes of getting my problem solved quickly and efficiently all the while organizing for my trip.

My behavior dovetails with Figure 7 when we asked, “Why is live chat preferred?” Most of the answers were part and parcel to my experience including an immediate answer and the most efficient means to problem solving.

Desirable Demographics Demand Attention
Interesting directional shifts seen in the survey findings include women becoming growing live chat participants. High income and across the board usage by age was also widespread. We are big spenders on a mission and a prized segment not to be missed.

Merchants need to move off the needle as today only 47% of the EG 100 merchants from our Annual Mystery Shopping Study support live chat. From a proactive perspective, 21% of the sites invited us to chat as well. The customers that every merchant covets are tapping into live chat today. Live chat is chosen as the preferred method of communication emanating from support issues such as general questions or checkout errors, but also serving shoppers when they have trouble finding items, comparing products of interest or being on the hunt for promo codes that save them money. These consumers are satisfied, they shop and the reasons they prefer live chat are multi-faceted in nature.

The Fan Factor
Whether proactively invited or self-initiated, shoppers are finding many ways to chat with retailers. An exploration of the elements that worked through my mind can be seen in the research results. I would like to begin with satisfaction as this is the ticket to retention that all retailers seek. While 69% of the 2012 sample report top 2 satisfaction (good+excellent), fan satisfaction tips the charts at 91%. With adoption among respondents climbing to 75% of the regular shopping population, we can only expect most newbies to become fans in short order.
Knowing these satisfaction levels, merchants should make themselves aware of what encourages people to chat. Topping the list are incentives such as free shipping shared as part of the standard opt-in chat or proactive invite. Additionally, letting shoppers know about long lead times on the phone and the availability of chat to address needs more expediently also fostered chat among surveyed shoppers.

It is also here that we see the influence of the technology among chat “fans” and the behavior they elicit making it important to recognize that frequent chatters over index on almost every benchmark measured acting similar to behavior typically seen in frequent web shoppers.

Fans shared their sentiments about live chat and they are instructive as retailers want to understand what resonates with visitors. They are looking for anywhere access, the human element (no automated bots) and when comparing chat to both email and phone find it much more effective. I would also suggest that retailers heed the warning that these shoppers prefer to shop at websites with live chat where fans are 20% more likely to prefer chat-enabled retailers. As they gravitate to these retailer sites, it is with purchasing in mind as frequent chatters report being 65% more likely to purchase than those that simply prefer chat at 56%.

For me, this year’s results center on the fans and those shoppers who are satisfied with chatting with you and ultimately purchasing. These insights suggest, at minimal, testing chat but bearing in mind that this shopper is discerning and discriminates between those with exemplary execution and others where experiences are imperfect.

Retailers must get ready as these chat experiences are mission critical for attracting this desirable customer segment. As you peruse these results it will become clear that chat must be a course for consideration on the path to customer acquisition. I look forward to shopping on all of your sites where the support option includes chat and the experience you deliver causes me to become a fan of your brand and a loyal customer for years to come.

Happy Chatting!

Lauren Freedman
Introduction to the 2012 Edition

In its fourth and penultimate year, the Effectiveness of Live Chat Technology set out to deepen the knowledge we've been building since 2009 with regard to online shopper’s attitudes, opinions, and behaviors toward live chat. We also wanted to directly address many of the recommendations from the 2011 edition which included the desire to discover what leads someone to choose live chat as their communication method of preference, the satisfaction level of chats resultant from both opt-in scenarios and proactive invitations, along with a continued focus on monitoring chat adoption and usage outside of the United States, specifically in the UK.

We take a new approach with this report in our presentation of findings which aims to shorten the overall length of the document while simultaneously highlighting the most important, intriguing, salient, and actionable data from the project. Rather than following the basic structure of our survey instrument and presenting all its data, as we've done in the past, we instead present the 5 key findings the data suggests and then investigate each one in some detail, using particular survey statistics to illustrate salient points. This method, made possible because of our partnership with the e-tailing group, puts the most interesting findings at the fore.

The e-tailing group Effect

For the second year, we’ve asked the e-tailing group to assist us with Live Chat Effectiveness. Because the e-tailing group consults and engages so closely and so regularly with major online merchants, their insights helped to shape the survey design, the fielding methodology, and the overall analysis presented herein. At the suggestion of the e-tailing group, we will also collaborate on a companion research study, “Chat with the Chatters” that moves beyond the quantitative to try and understand the mindset of this customer.

Methodology

Here we describe the sample and the instrument utilized to collect the data.

Sample and Survey Instrument

The study was conducted entirely online using a third party opt-in panel, 75% of which were located in the United States and 25% in the United Kingdom (UK). Those surveyed (often referred to as “entire sample,” “entire universe,” “respondent universe,” “population,” or other derivatives of these terms) totaled 2,027 people – up from just over 1,000 respondents last year.

The survey took, on average, 10 to 15 minutes to complete where respondents were required to completely answer all questions in order for the results to be counted among those reported here. It did however include several divergent paths where we were able to subsequently customize a set of follow-up questions to those respondents. Those circumstances including individuals who chose live chat as their preferred communication method, had been proactively invited into a chat session, had left a website because they were proactively invited, or reported never having engaged in a live chat with an online retailer.

The instrument was initiated with several screening questions in order to validate shopping frequency, country of residence and annual shopping expenditure. Only those respondents who indicated that they lived in the US or UK, spent in excess of $250USD per year online, and shopped at least monthly were allowed to participate. All other respondents were terminated.

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 within the answer lists. This measure was taken in order to mitigate order bias.
5 Key Findings
This fourth annual study of frequent online shoppers points to important conclusions for Internet retailers.

#1: Live chat has reached a tipping point of adoption.
Several metrics throughout this report show that live chat is being, or has been used by the majority of the shopping population. This year reveals significant growth over previous years for both chats occurring because visitors initiate them, and for chats resulting from proactive invitations. For Internet retailers, live chat is now table stakes.

#2: The multi-faceted nature of chat, combined with efficiency and control, puts chatters on the path to fandom.
We find, again, that ~20% of the shopping population prefers using live chat to contact a retailer rather than using any other communication method. Further, we’ve discovered how they became fans of live chat and that these catalysts are largely within the control of retailers themselves.

#3: While live chat fans are highly desirable, frequent chatters demand special attention.
Live chat fans are more likely to have higher household income, more likely to shop more frequently, spend more, be college educated, and aged 31-50. This demographic is attractive to retailers and they are also the most influenced by live chat in the purchase cycle. But, the regular or frequent chatter (those who have chatted 4 or more times in the past few months) show these attitudes in an amplified way. They may be even more desirable, but they expect more from the technology and retailers as well.

#4: Live chat in the UK is on the rise – both in terms of adoption and favorability.
Live chat didn’t show very well in our research with UK shoppers last year. In many ways this year it’s on par with the US or certainly moving in that direction.

#5: For online merchants to get the most from chat, they have to treat it as a distinct communication channel.
Based on the growth of chat being seen, we’re approaching the time when 75% or more of regular shoppers will have engaged in a live chat before with a retailer. That, in and of itself, should be a revelation for ecommerce websites – if three-quarters of the regular shoppers on your site have engaged in a live chat before, shouldn’t this technology be taken seriously? But there are other compelling reasons too, including high satisfaction expectations, and the idea that live chat can go wrong if not properly managed.

Detailed Conclusion Analysis
The remainder of this document concerns itself with a thorough investigation into each revealed the conclusions posited above. Here, we present data from throughout the survey in support of each of the five statements. When appropriate, data from past Live Chat Effectiveness projects are also integrated.

#1: Live chat has reached a tipping point of adoption.
In each year of this research, we ask the simple question, “have you ever engaged in a live chat session?” The first year we asked the question (2009), fewer than half the population indicated they had. This year the number is nearly two-thirds of the universe and the growth rate, year-over-year, has jumped into the double digits.
With adoption likely to continue at this rate, three quarters (75%) of the regular shopping population will have engaged in a live chat by the time we publish this report in 2013. In fact, there is reason to believe we can expect exponential growth beyond these findings.

**Exposure reveals multi-faceted nature of chat experiences**

Other data from the survey supports the idea that chat’s importance and efficacy has truly come of age. Since the inaugural year of this research, we’ve asked people to indicate, for a number of distinct shopping scenarios, what their preferred contact method would be under each case. This year, there are two findings of importance. For the second year in a row, ‘dialing an 800#’ wasn’t chosen as the preferred method in any case. Equally interesting is that live chat was chosen as the preferred method in 5 out of 8 scenarios. This is up, markedly, from live chat being selected for two scenarios in the first year of this research, no scenarios in year two, and two in year three.

For more than 60% of the scenarios, the results of the entire sample show that the population chooses live chat as their preferred way to contact a retailer. This is likely related to the first result in this section – that the use of chat is way up. So too, is the use and acceptance of proactive chat.

Last year, 57% of the population reported that they’d been proactively invited into a chat session at one time or another. This year it was up to 66% of the universe saying they’d been proactively invited. The sample’s reactions to this practice are somewhat counterintuitive. One might think, reasonably, that an increase in the use of a proactive approach to website visitors might saturate the market with invites and therefore drive down the population’s overall satisfaction with the practice. That saturation point appears, based on our instrument’s measure of receptiveness, to be very far away.
We asked respondents, on a 1 to 5 scale where 1 is “annoyance” and 5 is “appreciative,” to indicate their reaction to being proactively invited. We consider ratings of 3, 4, and 5 to be “receptive” and we were gratified to see that receptiveness numbers grew once again. This year, as you can see above, the number increased again. Overall, nearly two-thirds of the sample indicated their receptivity. If you look only at the obviously positive responses – 4 and 5 scores, the trend is equally compelling:

The results of a new question in our research support the idea that this receptiveness will continue to rise. For those who were proactively invited (66% of the universe), we then asked if they accepted the invitations and engaged in a chat conversation. For those who did (just over half) we inquired how satisfied they were with the resulting interaction. The vast majority of respondents found the live chat session to be satisfactory.

In various places throughout this year’s *Live Chat Effectiveness* research, there is significant evidence that the technology is approaching wide-scale adoption. The e-tailing group’s *Annual Mystery Shopping* of 100 merchants revealed that almost half (47%) now employ click to chat while 21% triggered proactive chat during our shopping experiences. We know that frequent shoppers are statistically more likely to have used live chat than not. We might postulate that based on this, an Internet retailing site is more likely to employ live chat technology than not. Anecdotally, this has been true for a couple years. What seems to be happening is that two different species are on the brink of extinction: sites not utilizing the technology, and shoppers who haven’t.
#2: The multi-faceted nature of chat, combined with efficiency and control, puts chatters on the path to fandom.

By far, the most significant finding from last year’s report was simply that 1 in 5 shoppers preferred live chat as their communication method of choice for contacting a retailer – no matter the circumstance. This year we again see consistent results – ~20% of regular Internet shoppers want live chat above all else.

Efficiency Again Sets the Stage for This Story

It’s efficiency, in fact, that explains why 1 in 5 shoppers choose live chat above anything else. One noticeable insight this year is the addition of Social Media given its growing role in society. Not surprisingly, the number of early adopters is slight at 2%, but an important starting point. It may be initially shocking that anyone would choose social media as their preferred contact method for retailers, but we fully expect the number to grow over time given that many consumers are always on social networks. Furthermore, we expect it to grow in the same manner as it is making its debut – at the expense of less efficient channels like email.¹

¹ For more about the decline of email responsiveness see: “Email Management: Nurturing or Blowing Up Your Brand,” Hornstein & Associates.
For those indicating that live chat is their preferred communication method it is clear that the most salient reasons are about saving time. Despite its importance one shouldn’t sell short the sentiments about quality of the experience and the information received.

**Consumers Take Control via Live Chat**

This year, besides understanding why someone might choose live chat above other channels, we were interested to determine how someone might become one who prefers live chat – a live chat fan. The results were surprising. Recall that the universe is composed of frequent Internet shoppers. As such, we might assume that it was a particular shopping scenario which first introduced a live chat fan to the technology. But it’s not. It’s not even the second reason.

Support related chats were, in fact, the most popular answer among the live chat fans, followed closely by chats resulting from proactive invitations. Surprisingly, initiation of a first chat while shopping was the least popular answer. Customers get their toes wet with simple service scenarios and graduate into greater usage when more comfortable with the tool.

These same live chat fans, however, reported that the last time they used chat was for shopping-related reasons.
These data points, when taken together, tell an intriguing story about how someone becomes a live chat fan and how they behave after they are one. Live chat fans are made – and most likely by a chat engagement that they initiate for a support-related reason. Sometime after this initial experience, and we can only assume it was a positive initial experience, these visitors begin relying on the technology while shopping as well.

**Cultivating a Fan – The Path to Chat**

While the number of regular Internet shoppers who’ve not engaged in a chat is shrinking, it seems advantageous to understand how they might first come to chat, because, as we’ve learned here, there’s a strong possibility they could become a fan of the technology.

Besides the answer implied in Figure 8 above – that the use of proactive chat can absolutely engage first-timers, we asked the portion of the population who’d never had a chat why they had never chatted. Many said they simply preferred another communication method – 39% said they preferred email and 27% said they preferred the phone. But 31% said that the sites they shop at simply don’t offer live chat. This reason will likely go away when a combination of consumer preference and merchant adoption further evolve as we have seen in the trends revealed from the past four years of our research. In the first year of this study, in fact, 52% of the non-chatting population selected non-availability as the reason for never having chatted – nearly 20 percentage points higher than this year.

Our guidance around using proactive chat as a way to first engage this audience seems supported by the responses of non-chatters to the question, “what would encourage you to chat?”
Respondents indicated that special incentives and special incentives via proactive invites were the two best ways. Interestingly though, were the next two most popular answers, which encourage users of other channels to try chat. It’s possible, therefore, to convert those who say they prefer email or phone to try live chat especially when the emphasis is on saving time and sharing chat’s availability.

Those who call and email today could be tomorrow’s live chat fans.

#3: While live chat fans are highly desirable, frequent chatters demand special attention. We find, again, that the demographic profile of the live chat fan represents a shopper who is likely coveted by Internet retailers everywhere. The statistical differences in this year’s research are directionally identical to last year’s, with one exception. We find this year that the live chat fan is more likely to be a woman.

<table>
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<th>Household Income</th>
<th>Age</th>
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<td>Less Than $50K</td>
<td>21-30</td>
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<td>33%</td>
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<td>Prefer Live Chat</td>
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<table>
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<tr>
<td>Some Collage or Less</td>
<td>Monthly</td>
<td>Weekly</td>
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<tr>
<td>Entire Sample</td>
<td>37%</td>
<td>58%</td>
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<tr>
<td>Prefer Live Chat</td>
<td>32%</td>
<td>53%</td>
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<table>
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<tr>
<th>Collage or Greater</th>
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<th>Weekly</th>
<th>More than Weekly</th>
<th>Under $750</th>
<th>Over $750</th>
</tr>
</thead>
<tbody>
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<td>63%</td>
<td>32%</td>
<td>10%</td>
<td>41%</td>
<td>59%</td>
</tr>
<tr>
<td></td>
<td>68%</td>
<td>35%</td>
<td>12%</td>
<td>30%</td>
<td>70%</td>
</tr>
</tbody>
</table>

Figure 10: Ways to Encourage Chats

Figure 11: Live Chat Fan Profile
The live chat fan is also more likely to have a higher household income, be aged 31 to 50, college educated, shop more frequently, and spend more. While service/support is a likely starting point for these shoppers, the merchant’s focus must center on conversion and likelihood to purchase.

The live chat fan – we can now see – is so called because their attitude toward the technology is nothing less than fanatic. The very presence of live chat makes nearly 60% of this population more likely to buy.
And compared to someone who’s simply chatted before, the live chat fan is much more positive about the technology across the board:

**Agreement with Statements About Live Chat**
*(Live Chat Fans Compared with Chatters)*

![Chart showing agreement with statements about live chat](image-url)
Live chat fans are more likely to desire shopping at websites that offer live chat, more likely to trust an unknown website if it offers chat, and more likely to buy from those websites as well. Live chat is a ticket to retention and should be top-of-mind for retailers.

**Demanding Frequent Chatters Deliver for Retailers**

It’s clear that the live chat fan represents a highly desirable group of shoppers, but, believe it or not, there’s another group of respondents who is even more attractive. We asked chatters how many times they’d chatted with retailers in the past few months.

Twenty percent of the population has engaged a retailer in a live chat 4 or more times in a 90-day period. As expected, there is a relationship between them and the group who prefers live chat.

- While only 20% of the overall population prefers live chat, 45% of these regular chatters prefer it.
- While only 20% of the overall population has chatted 4 or more times in a 90-day period, 34% of the live chat fans have.

Some may be wondering, “Why don’t 100% of these regular chatters choose live chat as their preferred communication channel?” To be fair, we simply don’t know the reason. What we do know, or at least can reasonably postulate, is that frequent use of live chat increases the chances that one will be a live chat fan and it appears to amplify the positive qualities seen in the live chat fan. These regular users are more than two times as likely to say that live chat is their communication channel of preference. And, they are more than one and half times as likely to say that than those who’ve simply chatted with a retailer before.
We also see that the desirable demographic and psychographic factors of the live chat fan are equally amplified when we look at the frequent chatter.

- While 63% of the entire population is college educated and 68% of the live chat fans are – 74% of the regular chatters are.

- While 59% of the entire population spends $750 or more per year in online shopping, 70% of the live chat fans and 75% of the regular chatters do.

- 42% of the entire population shops weekly or more. 47% of live chat fans shop weekly while regular chatters index even higher at 65%.

- 67% of the entire population has a household income of $50K or more in contrast to 74% of the live chat fans and 75% of the regular chatters.

We know that the live chat fan is greatly influenced to purchase based solely on the presence of live chat, but the regular chatter is even more so inclined in that direction.

So, the frequent chatter is an interesting and seemingly attractive sub-group of shopper. But, they are also more demanding of live chat. We asked all chatters what makes a chat session successful and, in general, everyone seemed to agree. By far, the most important factors overall, are the human factors – the live chat agent factors.
Agreement with Statements About Live Chat
(Live Chat Fans Compared with Chatters)

- Product/Service knowledge of agent: 93%
- Speed of agent response: 89%
- Not over using canned responses: 82%
- Grammatical correctness of agent: 64%
- Chatting with a real person: 89%
- Look/Feel of chat window: 53%
- Agent’s ability to direct browser: 70%
- Agent’s ability to co-browse: 67%
- Agent’s ability to insert images: 48%
- Ability of transcript to be printed/emailed: 61%
- Overall quickness of entire chat: 83%

2012 Chatters
2012 Prefer Chat
2012 4+ Chatters

Figure 17: Live Chat Session Success Factors
If, however, you look only at the “technology features” part of this question we see that the regular chatters consider these features to be more influential to the success of a chat session than others. This is likely due to their greater awareness and differentiation in the deployment of chat among participating retailers and the consumer’s appreciation for the sophistication of the tool.

Intuitively, perhaps, the more one engages in live chat, the more they expect from it.

#4: Live chat in the UK is on the rise – both in terms of adoption and favorability.

In last year’s report we found that chat was viewed less favorably by shoppers in the UK than in the United States. We find this year that the UK is moving closer to the US in both adoption and receptiveness.

UK shoppers are more likely to have used chat than not – a reversal from last year.

Major increases were seen across the board among UK respondents with regard to their attitudes about live chat, and its likelihood to influence and then to buy. That metric alone increased 40% year-over-year.
While still not as widely utilized in the UK as in the US, proactive chat also appears on the rise. Thirty percent more shoppers in the UK report that they’ve been invited this year as opposed to last.

And their reaction to the practice continues to be very positive – with 40% of UK respondents rating their reaction to being invited as either a 4 or 5 on a 5-point scale.

Overall, live chat’s acceptance, penetration, and status in the UK are improved versus results from last year. Perhaps this can be best seen in the 4 percentage point difference in how preferred live chat is versus other channels.
#5: For online merchants to get the most from chat they have to treat it as a distinct communication channel.
The data throughout this report makes one thing clear – live chat is a technology about which many have opinions and for which some have an affinity – likely a learned affinity. We postulate that any technology capable of driving a positive emotional response deserves focus and attention.

But why? Why should companies treat it differently than anything else? Chatters tell us what matters most are the agents on the other-side of the chat interaction (refer to Figure 16). But in the same way that live chat fans aren’t born that way, neither are live chat agents. Text-based communication is unique and requires different training, incentives, and skills. But that’s not the only reason to look at chat distinctly.

It’s Possible to Do Chat Wrong
We’ve learned that proactive chat is on the rise in both use and receptivity and that it can play an important role in creating a live chat fan. Due to its increasing importance, practitioners (or those considering it) should be careful not to do it poorly.

While proactive chat, as we’ve seen is generally well received, some 20% of those who receive invitations also said they’d left websites due to poor invitation practices. While proactive chat engagement seems a promising way to induct non-chatters into a brave new world of efficient communication, care must be taken to do it right.

The most popular response for proactive chat driving visitors away is likely a technical one. Many proactive invitation technologies on the market today force visitors to, in some way, acknowledge the invitation – either positively or negatively. In effect, the invite “takes over” the browser window and prevents the visitor from doing anything else. Ironically, many live chat providers consider this intrusiveness to be a “feature,” claiming it drives more engagements. Perhaps that’s true, but the cost of those engagements is outweighed by the negative experience it can invoke in the mind of the recipient.

Non-Chatters seem more tolerant of repeated invites, but administrators should still exercise prudence when configuring their software in this regard.

The final reason – “not being ready” – is simply a matter of practice and testing. Superlative performance in live chat is both an art and a science. Getting the timing right requires diligence and a love of reporting to continually refine the delivered experience for one’s audience.
Figure 24: Contact Method Satisfaction

Expectation Levels Are Likely High

We asked respondents to tell us about their satisfaction level with a variety of contact methods over the recent past. The disparity in live chat satisfaction was dramatic when you look at the live chat fan.

This difference can certainly be interpreted as being positively related – the live chat fan might be so exacting because their last interactions were positive. We agree that this logic is sound – and likely right. But the reverse is also true – a live chat fan will have higher expectations too. If 1 in 5 website shoppers prefer a specific communication channel, and they have high expectations of the interactions resulting from this channel and they judge success from that interaction largely on human factors – isn’t that more than enough for the channel to warrant serious consideration, funding, and management focus?
Recommendations And Next Steps

In last year’s (2011) edition of this study, we recommended taking a deep dive into the reasons behind someone becoming a live chat fan, a continued interest in live chat adoption in the UK, and even more information about proactive chat. This edition clearly delivered against these goals, though with all quantitative projects of this type, it begs questions for next year:

• The frequent chatter showed interest in certain live chat features – are there other features that matter?

• How should the appearance of social media as a preferred communication channel be integrated with chat?

• What behavior will chat fans embrace further in the coming year?

BOLDCHAT

BoldChat is a market-leading live chat solution enabling businesses to quickly and effectively engage visitors on their websites. BoldChat is offered in different editions and includes other integrated communications technologies like click-to-call, email management, SMS management, and co-browsing. Organizations of all sizes – from small proprietorships to large ecommerce enterprises – can drive more conversions and higher customer satisfaction by using BoldChat.

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Phone: (866)753-9933
Email: info@boldchat.com

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