

# THE DIGITAL CUSTOMER JOURNEY – GERMANY – 2023

The way consumers search for products and look for information is changing with AI delivering more personalised search experiences.



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# The Digital Customer Journey - Germany - 2023

## This report looks at the following areas:

- How advances in AI are impacting how consumers search for information online
- The ways consumers look for information/ideas online, with search engines still dominating, but social search being deeply rooted in younger generations' digital customer journey
- Activities consumers undertake before making a purchasing decision, with many seeking transparency and reassurance of making the best deal possible
- Issues consumers experience when buying products online, with supply chain problems being clearly felt by the end user
- Behaviours regarding the digital customer journey, with younger generations in particular blending the digital and physical search experience



The way consumers search for products and look for information is changing with AI delivering more personalised search experiences.

## Overview

**Consumers are conflicted regarding the trade-offs in terms of exchanging personal data for service;** 51% of online shoppers think it's acceptable for websites/apps to use personal data to provide a personalised shopping experience.

With the cost of living on the rise, price-conscious consumers meticulously evaluate and compare offers to secure the best deals. This frugality poses a heightened challenge for brands seeking to establish themselves and build consumer trust. 52% of German online shoppers compared offers between retailers before making a purchase. AI-powered search is

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making it even easier for users to compare offers on a product level, **challenging retailer visibility and customer brand loyalty.**

**Advancements in generative AI will enable retailers to personalise the customer experience on their own websites.** AI chatbots can provide transparent information, while AR-powered virtual fittings offer realistic product presentations, catering to consumers' desire to make informed purchases and reduce the risk of buyer's remorse due to misleading information.

With **78% of 16-24s** turning first to social media for information/ideas, **social search will become increasingly important, especially as third-party cookies are phased out and younger shoppers remain highly receptive to peer reassurance.**

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## Report Content



### EXECUTIVE SUMMARY

- The five-year outlook for the digital customer journey

#### Market context

- AI is set to transform online searches and shopping

#### Mintel predicts

- AI-powered search and personalisation define the future of searching
- Social media's expanding role in the digital customer journey

#### Opportunities

- Social search is impacting the younger generations
  - Graph 1: type of websites/apps consumers go to first when looking for ideas/information online, by age, NET, 2023
- Spread authentic buying reassurance through user-generated social media content
- Differentiate yourself with an enhanced on-website shopping experience
- Leverage AI-powered chatbot to learn more about the preferences of 16-34 year old shoppers
- Unleashing the power of AI-driven visual search

### MARKET DRIVERS

#### The German economy

- Stagnation follows a technical recession
  - Graph 2: key economic data, in real terms, 2019-24
- Continuously high inflation shapes consumers, brands and the economy...
- ...impacting financial wellbeing...
- ...confidence and consumer expenditure
- Consumers embrace deal-seeking habits

#### Supply chain disruptions

- Supply chain disruptions peaked in 2021...
- ...but labour shortages will continue to be a challenge for German production in the future

#### Purchasing channels

- The blending of channels: consumers shop both on- and offline
- Smartphones shape the development of multichannel business models
  - Graph 3: channels used to shop for products in the last 12 months, by age, 2023
- Mobile shopping further drives the importance of blended customer journeys

## AI's role in online search and shopping

- AI is transforming online search and shopping
- Etsy enhances online shopping convenience with visual search tool

## Social media

- Social media plays an essential role in the lives of young Germans
  - Graph 4: social media platforms used, by age, 2023
- 16-24s get shopping inspiration from social media platforms
- AI boosts social media's search capacity

## WHAT CONSUMERS WANT AND WHY

### Starting point of online search

- Eight in 10 start their digital journey on a search engine
  - Graph 5: type of website/apps consumers go to first when looking for ideas/information online, NET, 2023
- The future of search is social
  - Graph 6: type of website/apps consumers go to first when looking for ideas/information online, by age, NET, 2023
- Engage with 16-24s who search for inspiration and reassurance on social media
- More than a third head straight to a retailer when searching for clothing
  - Graph 7: type of website/apps consumers go to first when looking for ideas/information online, 2023
- Retailers must enhance search on their own websites

### Research activities undertaken online

- Half of online shoppers compare offers between retailers
- Seize the opportunity to support informed decision-making on own website
- Harness the power of peer influence with referral programs
- Simplify sustainable and ethical choices for 16-34s

### Issues when shopping online

- Combat out-of-stock frustration with advanced recommendations
- End of third-party cookies makes social media more prominent in the digital customer journey
- Leverage AR for realistic product presentations and more confident purchasing decisions

### Behaviours when shopping online

- Germans embrace the phygital customer journey
  - Graph 8: behaviours when shopping online, 2023
- Cater to flexible shoppers by letting them seamlessly transition between channels
- More personalisation in exchange for personal data: give shoppers the power to choose
- Personalise product descriptions using AI

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- Unify customer experience across app and desktop, and embrace mobile convenience
  - Graph 9: whether consumers prefer to shop by app or website, by age, 2023
- 16-34s are most likely to use offline and online in the same customer journey
- How the digital customer journey can incorporate physical space
- Harnessing the power of visual search and AI to convert younger consumers
- Shine a spotlight on the advantages of AI chatbots for online shoppers aged 55+
  - Graph 10: consumers who think an AI-powered chatbot could help them find products they're looking for online more quickly, by age, 2023
- Opt for human-like chatbots to better engage with shoppers aged 55+
- Use AI to take personalised recommendations to the next level
- Make use of social media's potential to become a serious player in ecommerce
- Leverage user-generated content for trustworthy customer experiences on social media

## LAUNCH ACTIVITY AND INNOVATION

- Klarna's AI-powered shopping lens simplifies product search
- Zalando is using avatar technology to give realistic presentations of clothing
- OTTO leverages AI to assist German online shoppers
- Snapchat is fast to innovate with the launch of an AI chatbot
- Klarna expands barcode scanning to leverage online benefits in-store

## APPENDIX

### Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

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