

The State Of Chat In Retail, 2021

Consumers Use Chat For Customer Support, Including Prepurchase Support, But Not For Commerce

by Julie Ask and Nicole Murgia

March 23, 2021

Why Read This Report

As consumers increasingly opt to engage with retailers and brands via chat, firms must ensure that customer experiences are efficient, effective, and effortless. Digital business pros have used chat for years, but few retailers have mastered using conversational interfaces to engage customers during the shopping journey. We reviewed 113 US retailers across categories such as fashion, electronics, travel, and quick-service restaurants (QSRs) to evaluate the current state of chat in retail.

Key Takeaways

Retail Chat Experiences Are Ubiquitous But Dated

Few brands have extended how, where, or why they offer chat to consumers to more modern scenarios, especially on mobile devices, platforms, or channels that leverage chatbots or offer asynchronous alternatives.

Chat's Main Role In Retail Is To Influence Purchases — Not Handle Transactions

Conversational interfaces will influence purchases by helping consumers find inventory, obtain store hours, select products, and pick up at stores postpurchase.

Future Chat Experiences Will Be Fluid, Relevant, And Convenient

The ease, effectiveness, and enjoyability of chat will replicate in-person shopping experiences by using context to proactively engage consumers in flow.

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Table Of Contents

- 2 Retail Chat Experiences Are Ubiquitous But Dated
- 4 Consumers Don't Buy Through Chat, But Chat Influences Purchases
 - Chat Helps Brands Improve Customer Experiences
- 10 Future Retail Experiences Will Be Fluid, Relevant, And Convenient

Recommendations

- 11 Take A Methodical Approach To Building A Chat Strategy

What It Means

- 13 Conversational Interfaces Will Moderately Impact mCommerce

-
- 14 Supplemental Material

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Retail Chat Experiences Are Ubiquitous But Dated

Consumers are increasingly comfortable engaging with brands to get tasks done through text-based conversational interfaces. In 2020, 42% of US online adults said that it was important for retailers to offer live online chat on their websites, up from 27% in 2019.¹ Consumers chat with enterprises when they have problems or need to return products. Other times, they use chat to get help making product choices or appointments. According to [Forrester's Moments Map, 2020](#), 23% of US online adults use chat to communicate with businesses at least monthly.²

Live or synchronous chat with humans for customer service is common across the websites of retailers, hotels, airlines, and quick-service restaurants (see Figure 1). Few brands have extended how, where, or why they offer chat to consumers to more modern scenarios, especially on mobile devices, platforms, or channels that leverage chatbots or offer asynchronous alternatives. In Forrester's review of 113 retail, hospitality, transportation, and QSR companies, we found that:

- **Live chat with agents on websites is ubiquitous.** Brands have a long history of offering customer support through live agents on their desktop websites. Among the brands we reviewed, 58% offered chat on their desktop websites as an interaction mode. Conversations with solution providers revealed that the COVID-19 pandemic has driven increased adoption of chat, both to give consumers choices and create cost efficiencies. Experienced agents can handle between five and seven text-based conversations simultaneously.³
- **Owned experiences on browsers dominate channel implementation.** The combination of computers (e.g., desktops and laptops) plus brands' own websites dominated device and channel implementations. Fewer brands deployed chat on mobile, but those that did were more likely to implement chat in the browser. Contact center solution providers reported that the highest [growth](#) was in SMS channels or on third-party platforms.⁴
- **Brands still rely on humans — not bots.** Among the 230 chat experiences that we reviewed, 53% were conversations solely with human agents. Only 26% of chat experiences relied on a hybrid model whereby a customer initially used a chatbot but escalated the request to a human agent if the bot couldn't handle it. Bots still struggle with conversations that depend on customer history and context from other channels as well as with complex or multipart queries. Third-party platforms such as Apple Business Chat even insist on elevation to human agents to maintain quality experiences.⁵
- **Few have migrated from synchronous to asynchronous chat.** The majority (60%) of chat experiences that we reviewed were live or synchronous chat, rather than asynchronous chat. Billions of consumers use asynchronous messaging with friends daily. These same consumers have shifted these same expectations of engagement to agents at brands because these interactions fit into their days and allow them to communicate when and where they choose.⁶ Forrester expects more large brands to implement asynchronous chat to complement the tens of thousands of smaller brands, such as blueseventy, Cactus Jungle, and Otter Bay, that have already done so.⁷

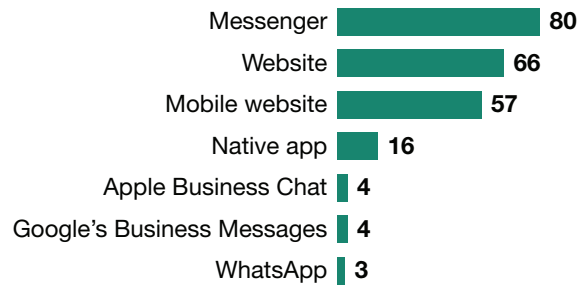
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Consumers Use Chat For Customer Support, Including Prepurchase Support, But Not For Commerce

FIGURE 1 The State Of Chat In Retail Experiences



1-1 Ninety-nine companies offered a chat experience on at least one platform (230 chat experiences in total)



Base: 99 companies that offered a chat experience on one or more platforms

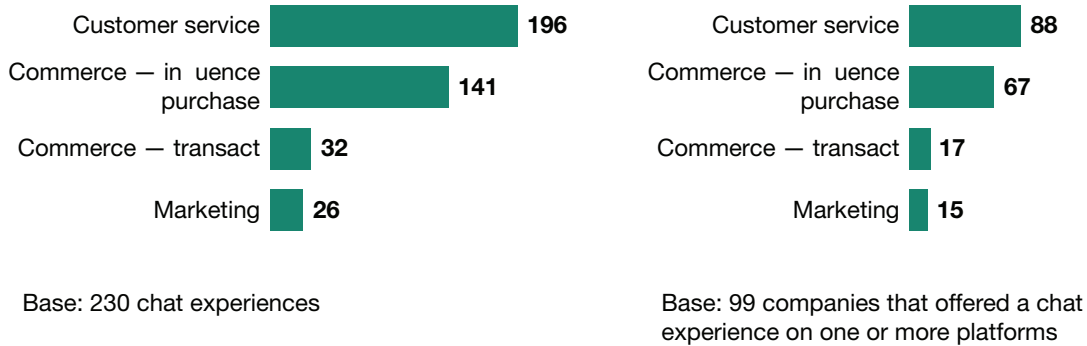
Source: Forrester's 2020 State Of Conversational Interfaces Evaluation

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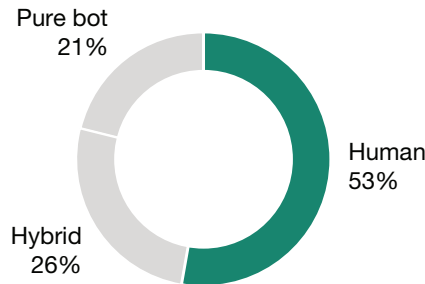
Consumers Use Chat For Customer Support, Including Prepurchase Support, But Not For Commerce

FIGURE 1 The State Of Chat In Retail Experiences (Cont.)

1-2 Customer service capabilities dominate chat experiences



1-3 Most chat experiences are with humans



Base: 230 chat experiences

1-4 Most chat experiences are synchronous



Base: 230 chat experiences

Source: Forrester’s 2020 State Of Conversational Interfaces Evaluation

Consumers Don’t Buy Through Chat, But Chat Influences Purchases

Digital and mobile experiences have historically had a much larger impact on influencing purchases than enabling direct transactions.⁸ Conversational interfaces play a similar role (see Figure 2). Through chat, brands influence purchases by helping consumers find in-stock inventory, obtain store hours, select products, and pick up at stores postpurchase. However, once the customer is ready to close out their cart, the chat box usually closes along with it. Some chat interactions allow agents to cobrowse with customers to give them more confidence in their purchase decisions.⁹ Forrester’s review identified five key ways that chat influences purchases today.

The State Of Chat In Retail, 2021

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- **Most chat experiences support customer service, including prepurchase service.** Few brands extend chat beyond traditional postpurchase customer service — a smart focus. Solution providers that Forrester interviewed throughout 2020 offered strong evidence that customers were very satisfied with chat and even preferred chat to agent support, especially when faced with long, pandemic-driven queues. [Lidl](#) and [Wendy's](#) leverage chatbots for simple queries like online delivery guidance and store hours. Brands such as David's Bridal and [Men's Wearhouse](#) extend customer support to schedule appointments for fittings.
- **Marketing on social media platforms brings consumers into the purchase funnel.** Consumer adoption of direct messaging on social media platforms has opened opportunities for marketers to extend interactions with consumers through conversations. Domino's Pizza and Giant Eagle use their Facebook presences to encourage customer interactions by featuring the Messenger option at the top of the page (see Figure 3). Each of the large US social media platforms (e.g., Facebook, Instagram, and Snap) continue to simplify this flow while maintaining the quality of the messaging experience by minimizing marketing or proactive engagement from brands.¹⁰
- **Chat offers an alternative next step to consumer search.** When consumers use browsers or map applications to search for businesses or products, they usually get links to websites. On mobile, these results include helpful options such as “get directions” and “click to call.” Now, Apple and Google offer chat as another alternative for companies that register to offer a “click to chat” option. Among brands we reviewed, Ashley Furniture, Neiman Marcus, and Office Depot offered this functionality. Apple and Walmart offer some of the most seamless experiences via both Apple Business Chat and Google (see Figure 4).
- **Few chat experiences support payments within the interface.** It's hard for the shopper when they can't complete a purchase right in a chat. In our review, 14% of chat experiences were able to facilitate transactions — including 9% that used payment within the chat and 5% that pushed consumers to a web experience to complete payment.¹¹ Messenger and Apple Business Chat are the only third-party platforms that support payments today. [Sephora](#) and [Warby Parker](#) offer two examples of seamless payment experiences within chat.
- **Customer service teams use chat to support customers postpurchase.** Pandemic-driven increases in online purchasing have also elevated consumer demand for purchase status updates, such as order confirmation, expectations management, shipment confirmation, impending delivery, and delivery confirmation.¹² Customer service organizations in companies such as [Urban Outfitters](#) tap into this data to assist consumers with postpurchase queries through chat or proactive notifications.

The State Of Chat In Retail, 2021

Consumers Use Chat For Customer Support, Including Prepurchase Support, But Not For Commerce

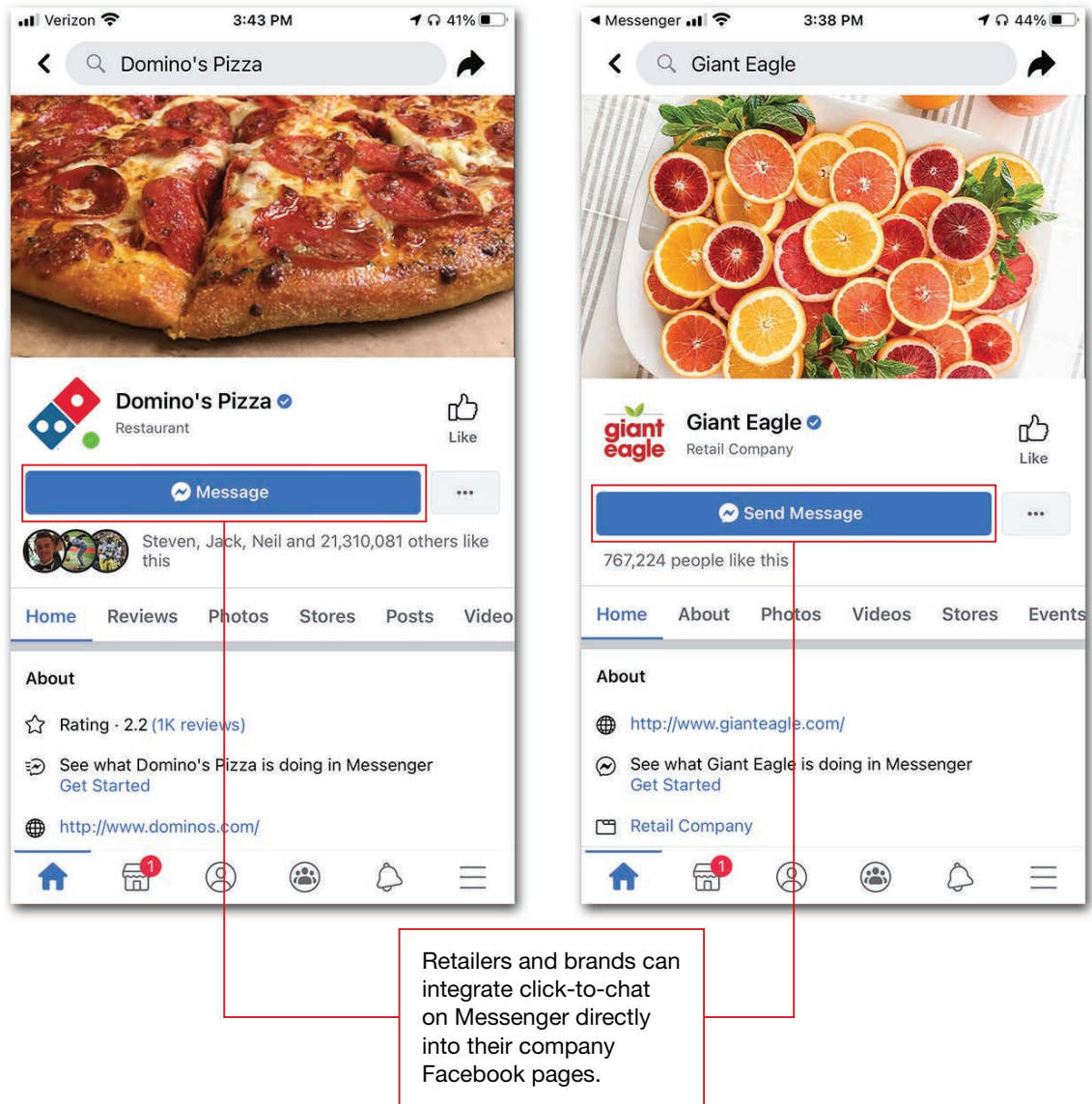
FIGURE 2 Retailers Can Utilize Chat Experiences Throughout The Customer Lifecycle



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Consumers Use Chat For Customer Support, Including Prepurchase Support, But Not For Commerce

FIGURE 3 Domino's Pizza And Giant Eagle Drive Traffic From Facebook Into Messenger



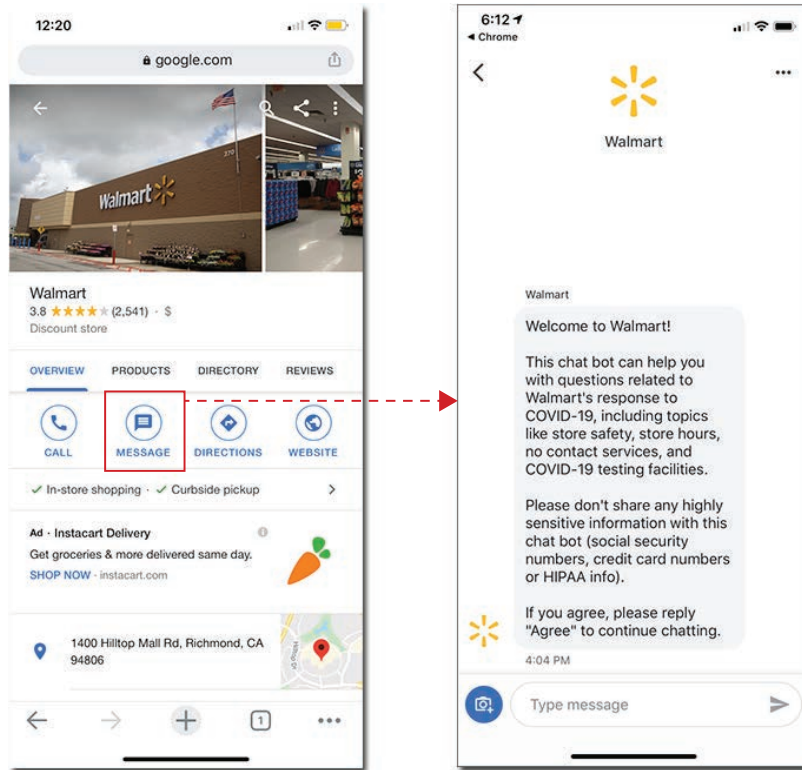
Source: Domino's Pizza Facebook page and Giant Eagle Facebook page

The State Of Chat In Retail, 2021

Consumers Use Chat For Customer Support, Including Prepurchase Support, But Not For Commerce

FIGURE 4 Consumers Can Access Business Messages Through Multiple Entry Points

4-1 On iOS, consumers can chat with brands via the entry point in native search



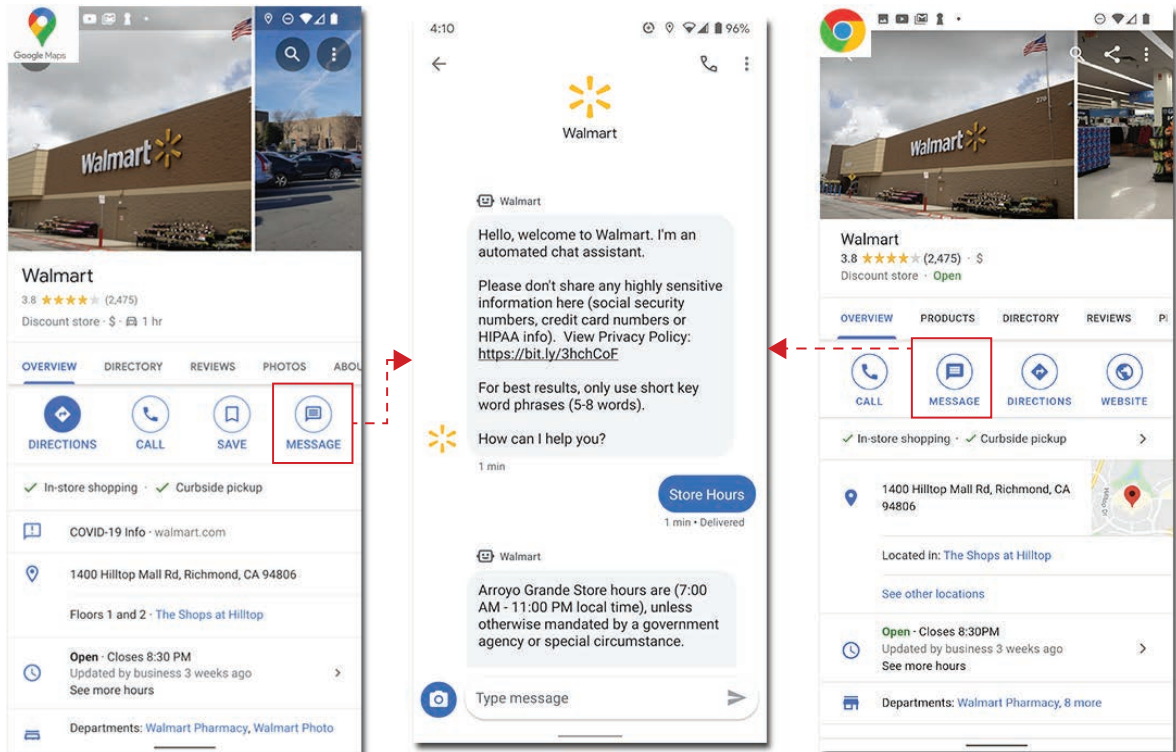
Source: Google Search result for Walmart

The State Of Chat In Retail, 2021

Consumers Use Chat For Customer Support, Including Prepurchase Support, But Not For Commerce

FIGURE 4 Consumers Can Access Business Messages Through Multiple Entry Points (Cont.)

4-2 On Android, consumers can chat with brands via entry points in Google Maps or native search



Source: Google Maps and Google Search results for Walmart

Chat Helps Brands Improve Customer Experiences

Conversational interfaces in retail and travel are nascent, but Forrester uncovered a few opportunities for brands to meet customers' basic expectations. They include:

- **Highlighting precise information to simplify shopping.** Criteria such as size, date, price, type of seat, or class of service available are common filters on retail, hospitality, and travel websites. When a consumer can specify in natural language what they want to buy within chat in exchange for precise product information, the shopping experience becomes much easier. The best chat experiences occur when the agent or bot go above and beyond; for example, when checking product availability in-store, [Aldi's](#) agent provided the exact number of units available as of that morning.
- **Tailoring recommendations to customers' specific needs.** Chat experiences were best able to replicate an in-store consultation process by asking detailed follow-up questions to determine the best product for the customer. This capability is crucial, as 35% of US online adults consider

The State Of Chat In Retail, 2021

Consumers Use Chat For Customer Support, Including Prepurchase Support, But Not For Commerce

it important for retailers to offer product recommendations based on their past shopping/browsing history.¹³ Before suggesting recommendations for a mattress, [Ashley HomeStore's](#) agent asks questions about the customer's preferred firmness level and sleeping position. [Holiday Inn](#), [The Vitamin Shoppe](#), and [Warby Parker](#) also offer strong customer service with their product-recommendation tactics.

- **Improving consistency of offerings across agents.** In reviewing chat experiences with humans within a single brand, Forrester found that the services that agents offered could vary significantly. One agent might offer to find inventory or take payment, while another would say that they couldn't do so. If you can't offer consistent experiences across agents or platforms, instead provide customers with detailed instructions or direct links to help them achieve their goals. For example, Domino's Pizza couldn't accept payment via a gift card in Messenger, so its agent sent the customer a direct checkout link to the website so that they could complete their transaction.
- **Responding quickly to customers.** In live chat, agents start and end sessions within just minutes. Occasionally, they hand off sessions to a colleague when a shift ends or they're overloaded. By contrast, in an asynchronous chat environment, consumers engage when it's convenient for them.¹⁴ A conversation could start and end within a few minutes, hours, or even a day. In our review, we found that response times weren't immediate, and brands didn't set appropriate expectations. Often, a customer's experience with a brand was inconsistent across platforms: While we could get an immediate response on the website, it could take hours or even days to receive a reply on Messenger.
- **Promoting their own or private-label products.** Consumers don't always seek a specific brand when browsing or shopping to fulfill a need. In fact, 41% of US online adults believe that private-label products offer better value than name-brand products.¹⁵ Both travel and retail aggregators have built huge businesses allowing consumers to shop across brands as well as their own products and private-label options. Chat experiences, specifically when used for product recommendations, let retailers promote their own products to undecided consumers. [Sephora](#) and [Tractor Supply Company](#) do this by recommending their own brands when customers ask for product help. [Dell](#) and [Hilton](#) use chat for marketing purposes and to promote loyalty programs and special offers.

Future Retail Experiences Will Be Fluid, Relevant, And Convenient

Offering conversational interfaces as an alternative to point-and-click or graphical user interfaces is a natural step for many tasks. Today, text-based chat powered by bots is limited to simple exchanges, but the range of sophisticated interactions that chatbots can support [will evolve quickly](#) to mitigate the costs associated with human agents. Future chat experiences in retail will:

- **Be shorter, as brands tap into context to streamline resolution.** Today's chat sessions often begin with exhausting exchanges of basic information such as name, account number, and topic. Consumers won't use an interaction mode unless it's fundamentally more convenient than their

The State Of Chat In Retail, 2021

Consumers Use Chat For Customer Support, Including Prepurchase Support, But Not For Commerce

current means of completing a task. Domino's Pizza understands this well — which is, in part, why the company limits what its chatbot offers. Conversations will really take off when brands have enough context to act on a request like, "Send me two of my favorite pizzas for dinner."

- **Emerge from proactive notifications.** Brands initiate few conversations in direct messaging because 1) they don't have the means to do so, and 2) most platforms forbid proactive engagement to uphold quality and to avoid a WeChat-like advertisement overload. In the future, brands will initiate short conversations to help consumers get tasks done — but that will happen only once brands develop the ability to anticipate customer needs and engage them proactively. As conversation-friendly yet app-independent technologies such as Rich Communication Services (RCS) move from niche to mainstream, the transition from notification to conversation will be more seamless.¹⁶
- **Originate on third-party platforms as often as owned properties.** Today, brands can migrate consumers from third-party messaging platforms to their own websites or embed third-party messaging from Messenger or Apple on their own websites. Future scenarios must be less clumsy by enabling consumers to retrieve information, track purchases, check inventory, and purchase goods seamlessly regardless of device, platform, or channel.
- **Include sound and images.** Once brands can literally see or hear what consumers are doing either online or offline through analytics, computer vision, and natural language understanding, they'll be able to engage consumers more naturally with more nuanced interactions in micro moments. For example, a shopper may point a camera at a dog's neck gaiter and ask, "Where can I buy this neck gaiter in green?"¹⁷
- **Be embedded in purchase funnels as quick, inline exchanges.** Consumers can have a conversation with a brand, or they can navigate through a web or app experience. They can't do both fluidly. Adding sound and images will help bridge the gap. Imagine the in-store experience of trying on a dress and looking in a mirror while talking to a sales associate. Consumers will turn to conversational interfaces when they can replicate that experience. [Bloomingdale's](#) style advisors are good at mimicking the in-store experience through chat.

Recommendations

Take A Methodical Approach To Building A Chat Strategy

Brands should approach chat just like they'd approach other platform and channel choices throughout their digital experience portfolios. Make technology decisions last. Digital business professionals should:

- **Start with a customer experience strategy.** The foundation of a digital experience portfolio is a customer experience strategy. You must understand the needs of your customers and how you'll serve those needs within the context of your brand promise.¹⁸ Prioritize improving the moments that would drive the greatest customer and business benefits in current and future journeys.¹⁹ Next,

The State Of Chat In Retail, 2021

Consumers Use Chat For Customer Support, Including Prepurchase Support, But Not For Commerce

map the content, services, and features you need to serve your customers in those moments.²⁰ Then work with your digital experience counterparts to understand and plan technology or channel options to deliver them.

- **Use Forrester’s POST methodology to determine where chat is the right channel.** Smart device, platform, and channel decisions still hinge on: 1) methodically understanding your customers and how they use technology; 2) articulating clear objectives; and 3) creating a strategy (e.g., the content, services, features, and more from your customer experience strategy).²¹
- **Understand where customers chat.** Use Forrester’s 3D Connected Consumer data to quantify where your customers are.²² Choosing notifications to remind patients of an upcoming appointment is a channel choice, but you’re not done — the next step is to decide what devices, platforms, and channels to use. Notifications can appear on smartphones, tablets, smart speakers, smartwatches, laptops, and more. You could use SMS or an IP-based version, such as a push notification, or even RCS messaging.²³ You could deliver notifications directly to an operating system (e.g., iOS) on a smartphone or smart speaker or within a platform environment (e.g., Messenger).
- **Use the Moments Index to gauge consumer propensity for using chat.**²⁴ Brands are spending money to build experiences that few consumers will use.²⁵ In some cases, those are strategic choices. In others, they’re blind bets. The Moments Index helps brands understand consumers’ progression from awareness to adoption, engagement, and comfort with (and eventually preference for) different interaction modes (e.g., chat, voice, or extended reality) for increasingly complex tasks.²⁶
- **Take chat’s expected evolution into account when planning.** The construct, tone, and sound of machine-originated conversations will feel more natural. Conversations will be embedded in more multimodal experiences and will be able to handle more complex questions. Improvements in microphones will pick up speech in noisier environments.²⁷ More importantly, conversations will move beyond the words or sentences uttered; they’ll tap into context to develop a more nuanced understanding of consumers’ intent, using both current context and prior conversations or other information stored as part of the consumer’s identity.

Conversational interfaces will also tap into computer vision for context; for example, to gauge emotions or to “see” what’s happening. Conversations will facilitate a more natural control of devices or information like internet searches. In the near term, this family of technologies will enable service providers in finance, healthcare, and education to scale coaching. In the longer term, the interpretation of conversations will evolve into products like diagnostic tools in healthcare for heart disease or Alzheimer’s.²⁸

The State Of Chat In Retail, 2021

Consumers Use Chat For Customer Support, Including Prepurchase Support, But Not For Commerce

What It Means

Conversational Interfaces Will Moderately Impact mCommerce

In 2019, Forrester studied the impact of conversational interfaces — both text and voice — on mCommerce in 10 industries with the guidance of more than two dozen analysts. The following material is an excerpt from that work. The impact of conversational interfaces on mCommerce in 2030 will be:

- **Medium in retail.** Conversations or natural language interactions will support retail transactions on mobile devices in the form of both chat and text. Already, 5% of US online adults make purchases via smart speakers. Today, conversational retail experiences tend to be simple use cases, such as multiple-choice paths or the replenishment of previously purchased goods. In the future, the ability of machines to understand more complex speech and utilize more context will elevate the role of voice in retail: For example, a consumer could say, “Replace the soap in the bathroom,” and get the result they want.²⁹
- **Medium in transportation.** Ordering transportation is quite frictionless today. Using natural language to say, “I need a ride to my office now,” to order a ride is faster than using an app, but there’s no significant convenience or economic benefit in ordering a ride via voice rather than with a few touches on an app. Once a consumer is in the vehicle, however, it’s likely that conversational interfaces will commonly deliver entertainment, productivity, and even commerce experiences. Perhaps even more common will be route changes: “Car, change destination to Oak Street instead of Temple Road.”³⁰
- **Medium in travel.** To facilitate flight and hotel bookings, travel aggregators have already deployed chatbots on third-party messaging properties primarily on mobile. However, these chatbots too often use multiple-choice or singular-path purchase funnels, which aren’t convenient for consumers today. There are simply too many choices and inputs for travel products or services at relatively high price points. Conversations will play a larger role in service — but less so in commerce. Hotels are already deploying virtual assistants as a concierge service to book reservations and send towels to rooms. The ability to use natural language will extend the complexity of requests that they handle.³¹

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Consumers Use Chat For Customer Support, Including Prepurchase Support, But Not For Commerce

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Supplemental Material

Conversational Interface Review Methodology

Forrester selected 113 top companies across retail, food and beverage, and travel industries and evaluated their chat experiences across seven online and mobile platforms: Apple Business Chat, Business Messages, desktop website, Messenger, mobile website, native app, and WhatsApp. The evaluation took place between September 2020 and November 2020 and represents the state of conversational interfaces during this time frame. We used this binary evaluation to determine which features (“customer service,” “commerce — influence purchase,” “commerce — transact,” and/or “marketing”) brands offered in chat and how they varied across platforms. We evaluated a total of 230 chat experiences.

The State Of Chat In Retail, 2021

Consumers Use Chat For Customer Support, Including Prepurchase Support, But Not For Commerce

Companies Interviewed For This Report

We would like to thank the individuals from the following companies who generously gave their time during the research for this report.

[24]7.ai	Khoros
Amplify.ai	Linc
Apple	LivePerson
Braze	LogMeIn
Cactus Jungle	LoyJoy
Clickatell	Messenger
Comm100	Oracle
Conversocial	Peter Kölln
eGain	Quiq
Glia	ReplyBuy
GM Financial	Salesforce
Go Moment	Savencia Fromage & Dairy
Google	Tailored Brands
Helpshift	Twilio
iAdvize	Vonage
IMImobile	WhatsApp

Endnotes

¹ Source: Forrester Analytics Consumer Technographics® US Retail Recontact Survey, 2020 and Forrester Analytics Consumer Technographics North American Retail And Travel Benchmark Recontact 1 Survey, 2019 (US).

² Source: Forrester Analytics Consumer Technographics Benchmark Survey, Part 1, 2020.

For more information on what devices, platforms, and channels consumers use, see the Forrester report "[The 3D Connected Consumer In 2020](#)." For more information on consumer adoption of, usage of, comfort with, and preference for interaction modes such as text-based chat, see the Forrester report "[Forrester's Moments Map, 2020](#)."

³ See the Forrester report "[Consumers Want Convenience, Not Conversations](#)."

⁴ For a list of solution providers, check out Figure 4 in the following report. See the Forrester report "[SMS: Customer Service's Ultimate Workhorse](#)."

The State Of Chat In Retail, 2021

Consumers Use Chat For Customer Support, Including Prepurchase Support, But Not For Commerce

- ⁵ For more information on the role of asynchronous messaging in customer service, see the Forrester report [“The Case For Asynchronous Messaging: Apple Business Chat, Messenger, WhatsApp,”](#) see the Forrester report [“SMS: Customer Service’s Ultimate Workhorse,”](#) and see the Forrester report [“Use Popular Third-Party Messaging Platforms For Customer Service.”](#)
- ⁶ For more information on consumer and enterprise adoption of asynchronous chat, see the Forrester report [“The Case For Asynchronous Messaging: Apple Business Chat, Messenger, WhatsApp.”](#)
- ⁷ See the Forrester report [“Use Popular Third-Party Messaging Platforms For Customer Service.”](#)
- ⁸ Mobile generated \$292.6 billion of commerce sales in 2018, and we expect it to grow at a compound annual growth rate (CAGR) of 11.8% in the next five years. See the Forrester report [“Forrester Analytics: Mobile And Tablet Commerce Forecast, 2019 To 2024 \(US\).”](#)
- ⁹ Check out this example of cobrowsing in a case study from a furniture retailer during the COVID-19 pandemic. Source: Norm Alegria, [“How A Canadian Furniture Retailer Drove Online Sales During a Pandemic,”](#) Acquire (<https://acquire.io/case-study/the-dufresne-group/>).
- ¹⁰ Rules or restrictions governing the use of platforms and notifications change on a regular basis. For the most up-to-date information, check directly with your solutions providers or owners of those platforms.
- ¹¹ In Forrester’s 2020 State Of Conversational Interfaces Evaluation, we were able to transact in 32 of the 230 chat interactions. This represents 14% of the total evaluated chat interactions. In 21 interactions (9% of the total evaluated chat interactions), we were able to transact in the chat itself. In 11 interactions (5% of the total evaluated chat interactions), we were bounced to the web to pay.
- ¹² See the Forrester report [“Retailers: Capitalize On Your Order Status Alerts To Thrill Customers And Gain Key Insights.”](#)
- ¹³ Source: Forrester Analytics Consumer Technographics US Retail Recontact Survey, 2020.
- ¹⁴ See the Forrester report [“The Case For Asynchronous Messaging: Apple Business Chat, Messenger, WhatsApp.”](#)
- ¹⁵ Source: Forrester Analytics Consumer Technographics US Retail Recontact Survey, 2020.
- ¹⁶ See the Forrester report [“Forrester Infographic: The State Of Anticipatory Experiences In 2020.”](#)
- ¹⁷ See the Forrester report [“AI Will Revolutionize Digital Experiences.”](#)
- ¹⁸ See the Forrester report [“Root Your CX Vision In Your Brand.”](#)
- ¹⁹ See the Forrester report [“Your Digital Experience Strategy Starts With A Customer Journey Map.”](#)
- ²⁰ See the Forrester report [“The Seven Steps Of Highly Effective Journey Mapping.”](#)
- ²¹ See the Forrester report [“Getting Mobile Right With Mobility POST.”](#)
- ²² See the Forrester report [“Guide: How To Use The Moments Index.”](#)
- ²³ Source: Julie Ask, [“RCS: What’s Going On?”](#) Forrester Blogs, January 29, 2020 (<https://go.forrester.com/blogs/rcs-whats-going-on/>).
- See the Forrester report [“RCS: More Myth Than Magic – For Now.”](#)
- ²⁴ See the Forrester report [“Forrester’s Moments Map, 2020.”](#)
- ²⁵ See the Forrester report [“Consumers Are Connected; Your Company Isn’t”](#) and see the Forrester report [“Consumers Are Connected; Companies Are Catching Up.”](#)
- ²⁶ See the Forrester report [“Forrester’s Moments Index.”](#)
- ²⁷ See the Forrester report [“The State Of Voice Assistants, 2018.”](#)

The State Of Chat In Retail, 2021

Consumers Use Chat For Customer Support, Including Prepurchase Support, But Not For Commerce

²⁸ For example, Amazon Web Services is partnering with healthcare industry leaders to create HIPAA-compliant conversational interfaces that support digital front door strategies. See the Forrester report [“How Amazon Plans To Reinvent Employee Wellness And Disrupt Healthcare.”](#)

²⁹ Source: Forrester Analytics Consumer Technographics North American Technology, Media, And Telecom Benchmark Recontact 2 Survey, 2019 (US).

See the Forrester report [“The Impact Of Emerging Technology In 2030 On mCommerce Experiences In Retail.”](#)

³⁰ See the Forrester report [“The Impact Of Emerging Technology In 2030 On mCommerce Experiences In Transportation.”](#)

³¹ See the Forrester report [“The Impact Of Emerging Technology In 2030 On mCommerce Experiences In Travel.”](#)

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