

THE B2B FUTURE SHOPPER REPORT 2020

Data gathered globally during
COVID-19 outbreak, giving insight
into how the outbreak will affect
the future shopper.



CONTENTS

3 EXECUTIVE SUMMARY

5 INTRODUCTION

6 SECTION 1: THE INCREASING IMPORTANCE OF ONLINE IN B2B

7 Chapter 1: B2B purchasing online on the rise

8 Chapter 2: Keep it simple

10 Chapter 3: KPIs

11 SECTION 2: THE ONLINE B2B SHOPPING JOURNEY

12 Chapter 1: Research

13 Chapter 2: Where does the purchase journey start?

14 Chapter 3: Through which channels do B2B buyers purchase?

16 Chapter 4: Switching suppliers

18 Chapter 5: Who is best at product availability during COVID-19?

19 Chapter 6: What can be learned from B2C?

20 SECTION 3: DECISION DRIVERS IN B2B

21 Chapter 1: Getting hold of products is vital

22 Chapter 2: What influences purchases?

23 Chapter 3: What are the pain points?

24 SECTION 4: TECHNOLOGY FOR THE FUTURE

26 CONCLUSION

29 ABOUT WUNDERMAN THOMPSON COMMERCE

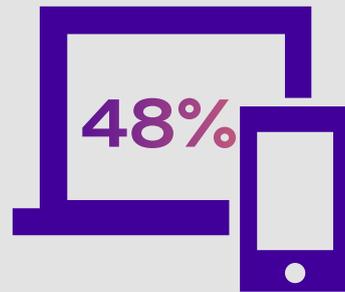
30 SERVICES TO SUPPORT BRANDS AND RETAILERS

EXECUTIVE SUMMARY

We know how busy work can be. And one thing that always gets pushed down the priority list is reading industry insights. With this in mind, if you've only got two minutes free, we've packaged up our key take-outs from our report:



the percentage that online B2B shopping increased in the last year



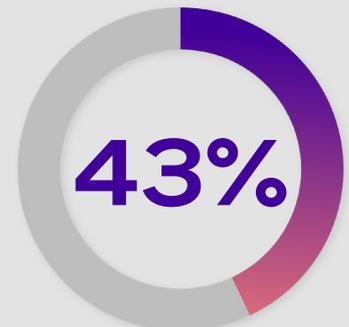
of B2B purchases are made online



of B2B shoppers identified "lack of inventory" as a pain point



of B2B shoppers have abandoned their cart because of inventory (product not in stock)



of B2B buyers said that their purchasing job would be made easier with real-time inventory availability



41%

start their purchase process on Amazon (B2C and B2B sites)

40%

said that they don't currently buy through Amazon Business, but intend to in the future

73%

believe that online marketplaces like Amazon are more "convenient"

EXECUTIVE SUMMARY



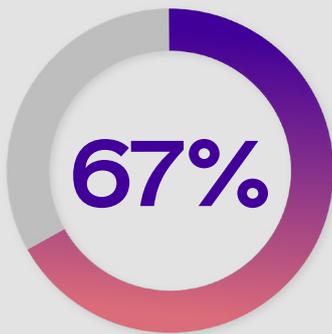
68%

think that B2B suppliers should use more mobile technology to enhance the experience



45%

of respondents said that buying online is more complicated than offline



purchase through suppliers' online portals



20%

have switched suppliers for all purchases because of COVID-19



of B2B shoppers switched suppliers during the COVID-19 outbreak because the existing supplier was not able to offer online ordering



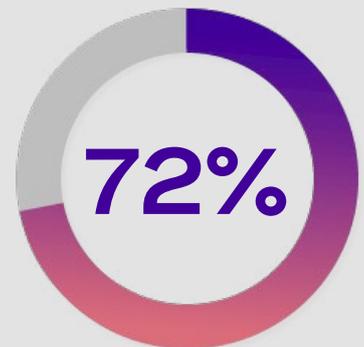
34%

start their purchase process on vendor / supplier portals and online catalogs



20%

the percentage buying directly from sales reps (down from 56%)



of B2B shoppers expect a similar experience buying on a B2B site as on a B2C site



Introduction

Welcome to the first edition of Wunderman Thompson Commerce's business-to-business (B2B) Future Shopper report focusing on the changing behaviors of B2B shoppers online. This particular report is our US edition and surveys the views of 200 US B2B buyers across a variety of roles and industries.

For four years now, Wunderman Thompson Commerce has published its Future Shopper B2C research focusing on how consumer purchasing behavior online has been changing over time and helping businesses to predict how consumers will change. But one of the common questions that we are asked is whether these behavioral changes and preferences are the same in the business-to-business sector?.

Now Wunderman Thompson has mirrored its B2C research with a dedicated B2B study looking at how B2B shopping habits are changing, how they are embracing technology to help them buy on behalf of their companies, and which channels are gaining traction.

Due to the timing of the research, we had a unique opportunity to look into how behavior was changing in B2B purchasing, not only generally, but also as a consequence of COVID-19. This enabled us to ask some very specific questions about how this global pandemic has affected behavior.

Before we proceed, it's first important to say that while this research covers online B2B buyers, this group consists of buyers with very different perspectives, objectives and aims when it comes to B2B buying. Some might simply be responsible for small-scale office supplies while others might

be responsible for buying key components of production at a huge scale. To give a sense of where the market is heading, we have looked at the overall responses, but have also, where relevant, looked more closely at these differences. Of course, if any more insight is needed, then please contact us.

So here we go. For the first time ever, we introduce to you the B2B Future Shopper report – we hope you find it interesting, useful and insightful.

Methodology

Research was conducted between April 17th and 27th 2020 of 200 B2B professionals in the US.

Respondents were aged 20+ and covered roles including purchase managers, procurement managers, purchasing clerks, agents, purchaser and c-level executives.

Respondents held roles across the following industries: Construction & Hardware, Food & Beverages (Groceries), Pharma & Medical, Cosmetics, Healthcare & Beauty, Chemicals & Biotech, Automotive, Electric Equipment & Consumer Electronics, Packaging & Containers, Fashion & Apparel, Media, Farming & Fishery, Furniture and Luxury Goods.



Hugh Fletcher
Head of Thought Leadership
(EMEA) and Marketing (UK)
Wunderman Thompson
Commerce

Section 1: The Increasing Importance of Online in B2B





Chapter 1: B2B purchasing online on the rise

One of the first questions that the research needed to address was whether B2B purchasing online was on the rise or decline? Our respondents confirmed that B2B online purchasing is on the up, increasing by 22% since last year, on average.

When looking at the size of business and the percentage that B2B online purchases had increased, there was very little difference between the different sizes of businesses – with the smallest (those with revenue below \$12.4m) increasing by 20%, the medium-sized businesses (\$12.4m – \$124m) increasing by 23% and the largest (those above \$124m) by 22%.*

But as the world fights against a global pandemic amid truly exceptional times, what effect has COVID-19 had on this? One would presume that with the impact of self-isolation, working from home and lockdown, that online purchasing, as a percentage of overall spend, would be on the rise. To get an understanding of this we looked at pre-COVID-19 activity and the “new normal.”

22% – the amount that B2B online purchasing has increased in the last year.

Pre-COVID-19, respondents reported that 38% of their B2B purchases were made online on average. In the current climate though, this percentage has increased to 48% showing a transition to more online ordering.

One question to ask is whether size mattered when it came to what was being spent online before and during the COVID-19 outbreak?

Pre-COVID-19 outbreak, small businesses and large businesses were spending almost the same percentage of their spend online (37% and 38% respectively), with the largest percentage being accounted for by the medium-sized businesses (47%). All jumped up during the COVID-19 outbreak with large businesses in first place (55%), then the smallest in second (52%), followed by medium businesses (51%).

And what about the frequency with which B2B buyers purchase? On average, respondents are placing online orders with their top 10 suppliers every 2.3 weeks.

Clearly the B2B industry, like B2C, is entering a time when digital sales are very much on the rise, and when B2B businesses need to cater to an increased demand for digital interaction. This move must influence B2B organizations’ strategies.

*the size categories were defined by using pound sterling as the base, hence the divisions presented appearing rather arbitrary



Chapter 2: Keep it simple

Despite a large proportion of B2B purchases being made online, overall, the experience seemingly is not what it should be, with a clear need to inject more simplicity. Over 2 in 5 (45%) of respondents said that buying online is more complicated than offline, compared to 20% who that said it was less complicated.

Given that many businesses will be forced online in this new world, one area of focus must be to simplify the customer experience when it comes to digital B2B purchasing. While B2B purchasing scenarios are inherently more complex than B2C purchasing journeys, it is essential that B2B businesses are constantly reviewing the user experience (UX) and optimizing this experience through testing, to ensure that B2B customers can easily navigate their sites, find the information and products that they require, and ultimately transact on their sites.

45% of online B2B shoppers said that buying online is more complicated than offline.



There is a tendency for B2B vendors selling through their own portals to give less attention to their user experience (UX) than in the B2C market. This provides a huge opportunity to increase sales and conversion, given the volume and value of online B2B purchasers. A user-centric approach must still be embraced to ensure that B2B buyers are encouraged to move through the purchasing funnel and ultimately transact.

As with B2C, we have found that some B2B businesses are unclear what their customers' missions and mindsets are. By combining user research and site analytics we have mapped many customer journeys – providing key insights into customer wants and needs, opportunities and challenges. By doing this we have helped businesses define both quick wins to create a frictionless user experience and bigger strategic ideas to transform their business. To achieve this, we have defined a prioritized roadmap for delivery, and a service blueprint across people, process and technology.

We would strongly encourage B2B businesses to embed a user-centric approach to research, design and development for their own long-term benefit.



Rachel Smith
Head of CX

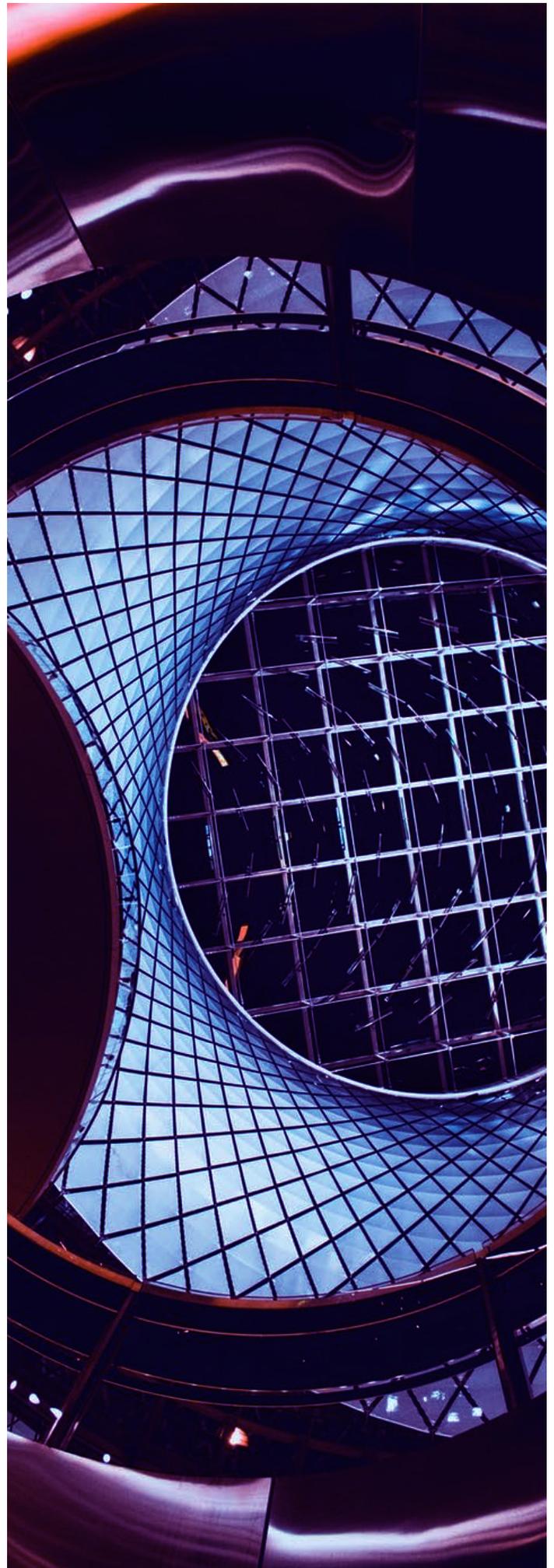


COVID-19 has introduced a very unique set of circumstances and challenges. So, we also asked B2B shoppers what would make their purchasing job easier in light of their COVID-19 experiences. The top three most commonly selected answers were:

1. Real-time inventory availability (43%)
2. Transparent fulfillment / shipping information (32%)
3. Access to alternate suppliers (31%)

A higher percentage of B2B buyers from big businesses (vs. smaller and medium-sized companies) claimed that “transparent fulfillment / shopping information,” “access to alternate suppliers,” “artificial intelligence” and “machine-learning,” and “technological product advancements” would make their purchase job easier in a number of categories.

What’s clear from these answers is that supply chains have been heavily affected by the outbreak of COVID-19. The result of this has been challenges in product availability and the ability to deliver products to B2B customers. Seemingly key to keeping B2B customers on-side in these challenging times is transparency and honesty around stock and delivery. B2B businesses must ensure that the proper back-office integrations are in place with the corresponding UX improvements to display real-time inventory, transit times, and transparent messaging around back-ordered products or fulfillment delays.



Chapter 3: KPIs

Another question worth asking, is what are the KPIs of B2B shoppers? The presumption would be that these KPIs would drive decision-making and therefore need to be considered by B2B sellers in designing their online experiences. When we look at the top KPIs – the metrics upon which they are judged – cost savings and purchase efficiency are the most important factors:

Cost savings (63%)
Purchase efficiency (50%)
Brand awareness (45%)
Category optimization (35%)

We'll revisit this later in the report to see whether these KPIs really do drive B2B customers' behavior, or whether the reality is slightly different.

Section 2: The Online B2B Shopping Journey





Chapter 1: Research

Clearly, with so much riding on B2B purchase decisions, and with these purchases forming part or all of the respondents' job roles, the research element of the purchase is quite in-depth.

Before purchasing online, B2B buyers said they were spending an average of 1.7 hours educating themselves on new products, 1.7 hours researching (best service, price, etc.) and 1.4 hours on consideration and approval.

How does this vary according to the size of the business? As you might expect, it is the smallest businesses who spend the least time in the education (1.2 hours), research (1 hour) and consideration and approval stages (1.1 hours). On the flipside, it is the medium-sized businesses who spend the most time in education and research (2 hours for both), while the biggest companies are those that take the longest in the consideration phase (1.5).

Ensuring that B2B buyers have access to the right information and content, in the most accessible, easily digestible way possible, is vital in informing their decisions and something that all B2B sellers must work on. In section 3, we'll

touch on the decision drivers which should help B2B sellers establish their strategic route to improvement.



Providing comprehensive product content – descriptions, images, specifications, multimedia and supporting documentation – is a base requirement for effective B2B eCommerce. Providing rich product data is an industry-wide challenge, particularly for companies with extensive product catalogs, but is a must-have and should be a strategic priority. Without this, the buyer's purchase journey stalls, negating other investments in technology and user experience, and will often drive buyers to another vendor.



Randy Kohl
Head of Marketing, Gorilla Group – A Wunderman Thompson Commerce Company





41% – the percentage of B2B shoppers who start the purchase process on Amazon (both B2B and B2C).

Chapter 2: Where does the purchase journey start?

Once the research has been completed, the next stage to look at is the buying process, so we asked where B2B shoppers started the buying process when making purchases online.

The start-point identified by the highest percentage of respondents was vendor / supplier portals and online catalogs (34%) followed by Amazon's B2C marketplace (21%) and 20% through Amazon business. Google / search engines accounted for 14%.

While in the B2C world Amazon reigns, followed closely by search engines like Google, in the world of B2B, buyers are more likely to go direct to vendors – demonstrating how important it is that B2B sites are effective not only in capturing their customers through the research phase, but also in converting this research into purchase. Again, UX and content are key components to achieving this.

34% – the percentage of B2B shoppers who start the purchase process via vendor / supplier portals and online catalogs.

That being said, Amazon's presence in B2B can be felt strongly, taking the number one place when you add together the percentage starts on its B2C and B2B sites. Interestingly, its B2C site is where a higher percentage of B2B shoppers start their online purchases rather than its B2B offering. This is likely for searches for commodity

items like safety products, cleaning supplies, and other consumables, rather than more technical industrial parts and equipment. Seemingly, as with B2C, B2B organizations need to think about selling their products across several channels – and Amazon can be a key part of that mix.

But what about offline? Just 9% have started their online purchase process offline or with a sales representative. While we would expect this figure to be low given that we are talking about online purchasing, it goes to show that if the aim is to get B2B shoppers to convert online, then enabling field sales representatives with a robust set of digital tools is vital. Again, this reinforces just how important it is that B2B organizations ensure that their online sites are on point.

When it came to the size of the business, and where the purchase journey was started, there were some clear differences.

The smallest businesses (\$12.4m revenue) were much more likely to start their purchasing on Amazon's B2C site with 31% of B2B purchasers starting a journey there – this was compared to just 20% of medium-sized business (\$12.4 – \$124m) and just 8% of large businesses. This makes sense given that the larger businesses' purchases are more likely to be bigger, in greater quantity, and not necessarily ready for sale via a B2C marketplace.

However, the percentages were slightly different when it came to Amazon Business, where large businesses had the highest percentage (24%) vs. 19% for medium-sized businesses and 17% for smaller businesses.

And there were differences too when it came to the usage of the vendor / supplier portal / online catalog with the smallest business using this less (22%) than the medium size businesses (41%) and the largest businesses (44%).

Chapter 3: Through which channels do B2B buyers purchase?

But starting the purchase process on one channel is one thing. Through which channels do B2B shoppers actually purchase? The number one channel for B2B purchases, both before COVID-19 and now, is suppliers' online portals with 58% using this channel pre-COVID-19 and 67% using this channel currently.

67% now purchase through suppliers' online portals, a rise from **58%** pre-COVID-19 outbreak.

Interestingly, all other channels have seen a drop since the outbreak of COVID-19. This dip includes online marketplaces, which is somewhat surprising, but which dropped only slightly from 44% to 42%. This is likely due to a small number of B2B buyers sticking with existing vendor relationships, rather than exploring marketplace options.

Telephone ordering also saw a small drop of 3% from 45% to 42%.

However, one of the clearest impacts of COVID-19 on the channels used for purchase is the fall in purchasing directly from sales reps. Pre-COVID-19, over half (56%) of respondents said their business was buying directly from sales reps, but this fell dramatically during the pandemic with just 1 in 5 (20%) saying their business was still purchasing directly from sales reps. Is this a temporary effect of lockdown measures, the fact that sales reps were no longer on the road, or will this change be lasting? Time will tell.

Another big drop, understandably, came in B2B shoppers buying in-store and at vendor's warehouses. This fell from 50% pre-COVID-19 to 26% during the outbreak – presumably from the effects of lockdown and the businesses themselves being forced to shut their physical stores.



56% to **20%** – the drop in percentage of B2B shoppers buying directly from sales reps pre-COVID-19 to during COVID-19.



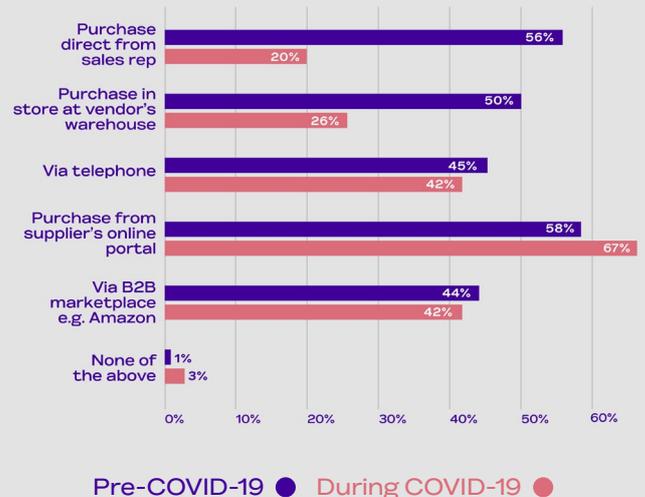
Despite supplier portals being key to online purchasing, and the slight drop during the COVID-outbreak in online marketplaces, almost three quarters (73%) of respondents think that online marketplaces like Amazon Business are more convenient than purchasing through individual supplier portals – and by convenience we mean offering range, ease of navigation, clear and relevant content and being simple to buy from.

73% said that online marketplaces like Amazon were more convenient.

Given the percentage of B2B buyers who start their purchasing process there, and this view of convenience, it suggests a potentially worrying signal for B2B sellers that the B2B market could follow in the footsteps of the B2C market with increasing marketplace and Amazon dominance in the medium to long-term. By comparison, only 19% did not think that marketplaces were more convenient.

This could also be a sign that businesses should start thinking more seriously about their Amazon B2B strategy to future-proof themselves. This is vital if the B2C market is anything to go by.

Through which sales channels did B2B buyers purchase pre and during the COVID-19 outbreak?



Chapter 4: Switching suppliers

When it comes to the pandemic and the effect on businesses, what has COVID-19 meant for switching suppliers for business purchases? As we would expect, COVID-19 has sparked significant change; 20% of B2B buyers have switched suppliers for all purchases.

More than 2 in 5 (43%) said they have switched to a new supplier for some business purchases as a result of COVID-19. On the flipside, 37% have not switched at all.

Why are businesses switching?

The top reason for moving to a new supplier as a result of COVID-19 was that the existing supplier was not able to offer delivery (45%); This was followed by the existing supplier being out of stock (39%).

These reasons very much mirror the trends that we are seeing in the B2C market where delivery (and fast delivery at that) is a vital ingredient to a modern commerce operation.

We have also seen increasing levels of frustration from B2C customers firstly at products being out of stock, and secondly the fact that online vendors are not making stock levels clear enough. It is vital therefore that online sellers are open and

20% of B2B shoppers have switched suppliers for all their purchases as a consequence of the COVID-19 outbreak.

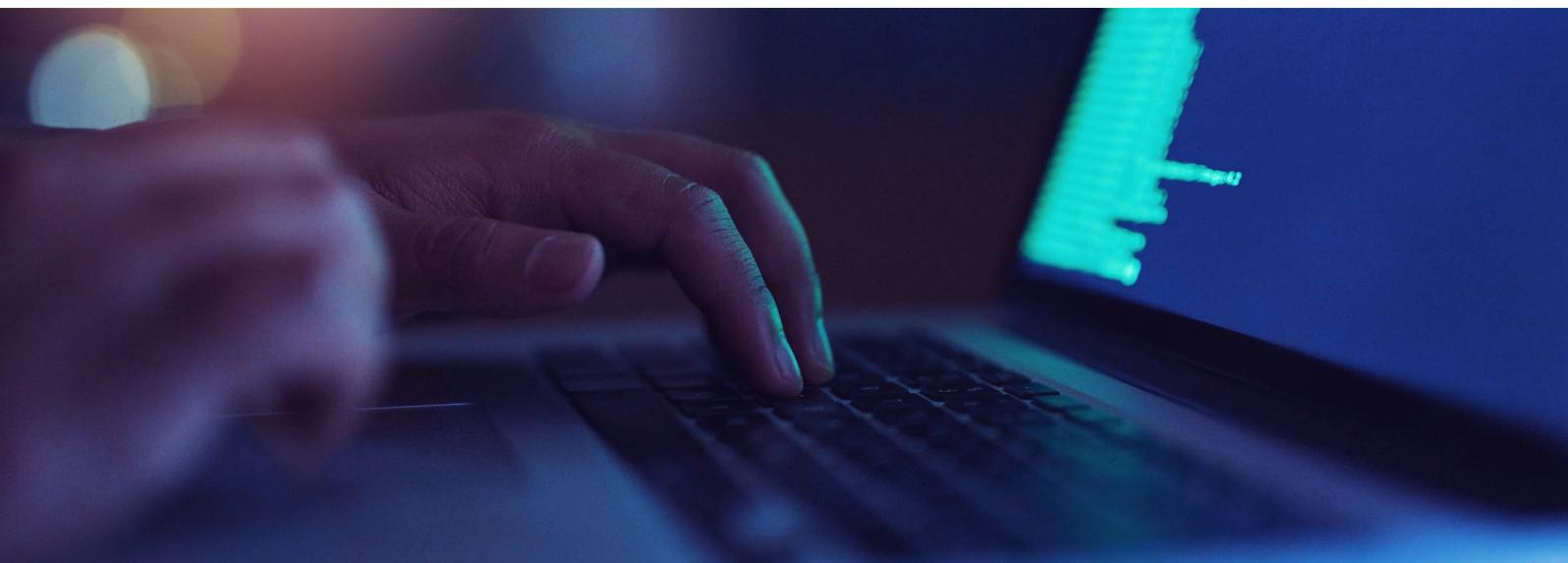
30% of B2B shoppers changed supplier because the existing supplier was not able to offer online ordering.

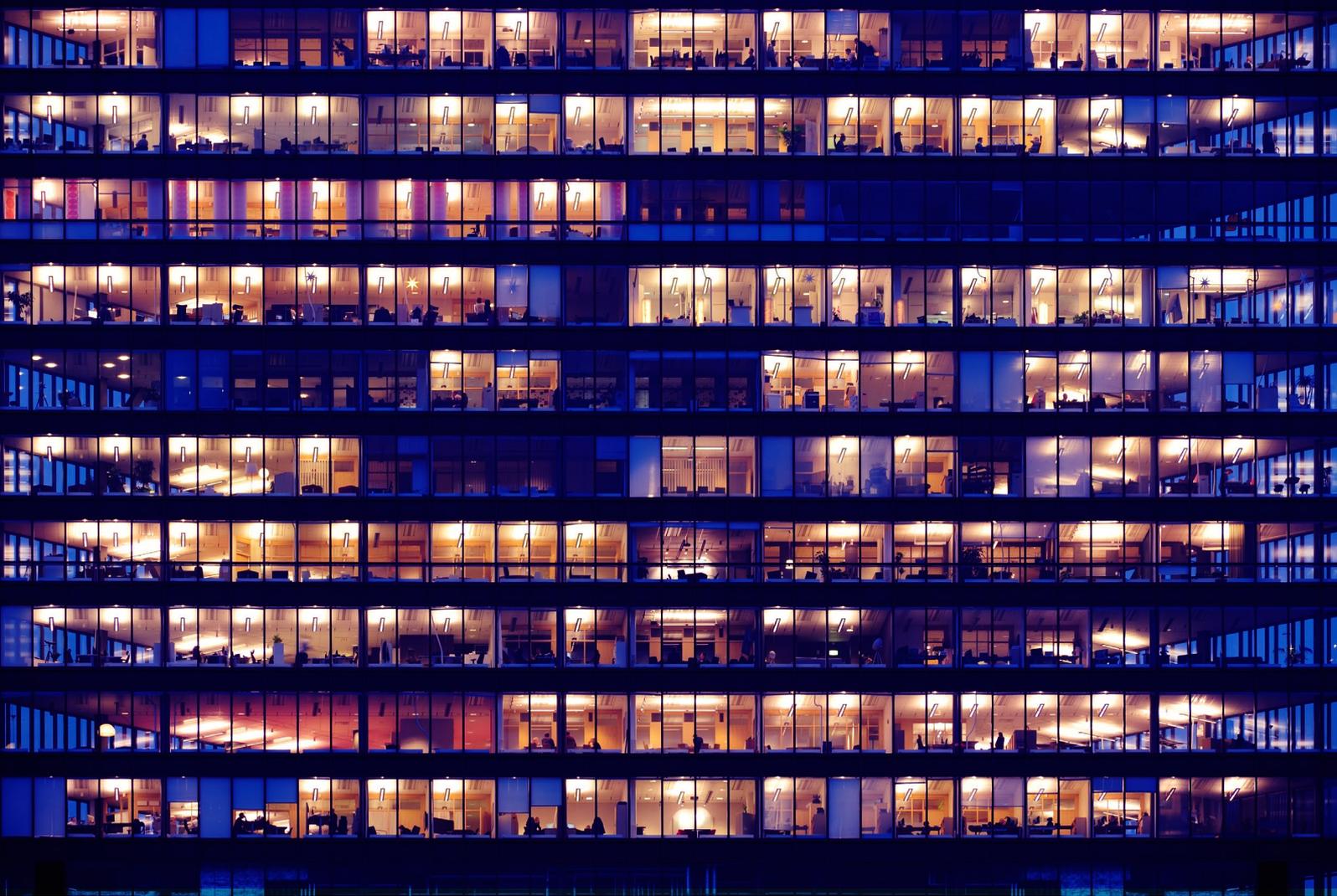
transparent about inventory levels, out of stock messaging, and timings around re-stocking.

Another key reason was that “the existing supplier was not able to offer online ordering” (30%), again showcasing the importance of digital purchasing processes. To be ready for the current and future B2B shopper, it is simply no longer possible to have no online presence.

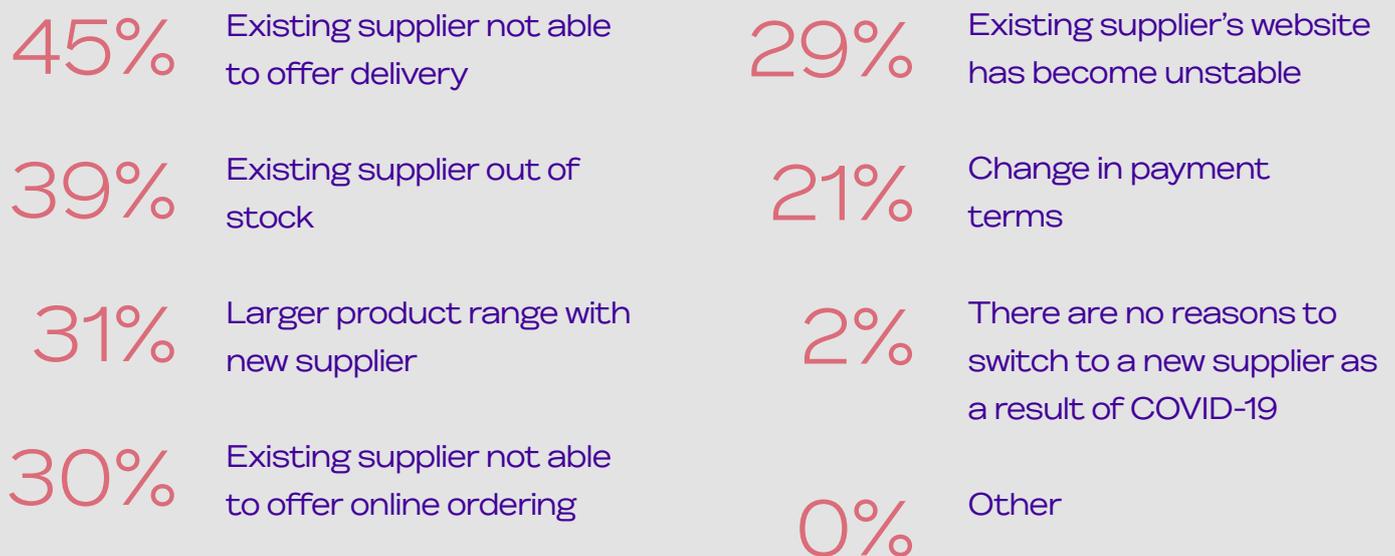
Again, highlighting the importance of a digital process was that 29% of respondents switched to a new supplier because the existing supplier’s website had become unstable. So, when working on their digital presence, B2B suppliers must ensure that their sites are robust and resilient. It is clear that some businesses, such as those in the pharmaceuticals industry, have experienced notable spikes in web traffic during the pandemic, especially those involved in supplying essential items. It’s vital these businesses test their sites as well as other key processes to ensure they can scale to meet demand.

Finally, close to a third (31%) simply switched because the new supplier had a larger product range, with one in five (21%) moving because there was a change in payment terms.





THE MAIN REASONS WHY B2B BUYERS SWITCHED TO A NEW SUPPLIER AS A RESULT OF COVID-19:





Chapter 5: Who is best at product availability during COVID-19?

With product availability being a key consideration for B2B companies and a significant reason for changing purchase behaviors, one area to look at is which channels have provided B2B buyers with the best product availability since the outbreak of COVID-19.

The answers indicate a migration towards digital channels, as can be expected.

The highest percentage of respondents selected the vendor's own supplier portal / online catalog (37%).

But Amazon's role is not insignificant as 1 in 5 (19%) said that its B2C site has provided them with the best product availability when purchasing business products, while 14% said Amazon Business. Of course, it's important to make the point here that this research covered B2B shoppers of all sizes, and there is a big difference in being great for everyday supplies like stationery versus being great at larger supply chain products like parts and ingredients. Nonetheless, Amazon's influence appears to be on the rise.

Further highlighting the role of Amazon Business and its potential to grow, 2 in 5 (40%) agreed that

they don't currently buy through it yet but intend to in the next 12 months, compared to 36% who disagreed.

However, for now, the B2B community, while increasingly using Amazon, still wants to go direct to suppliers online. It is, therefore, vital that B2B sellers ensure that their online offering is up to standard to ensure that conversion remains on this channel.



Amazon Business is a rapidly growing factor in the B2B segment. Annual gross sales were estimated at \$16 billion by RBC Capital Markets. To put that in perspective, that's larger than Grainger, Staples, or Office Depot. Similarly, but conversely, to how Costco built a retail business on top of its B2B success, we see Amazon creating a B2B business by leveraging its consumer operations.



Frank Kochenash, President, Wunderman Thompson Commerce, Marketplace Services, North America





Chapter 6: What can be learned from B2C?

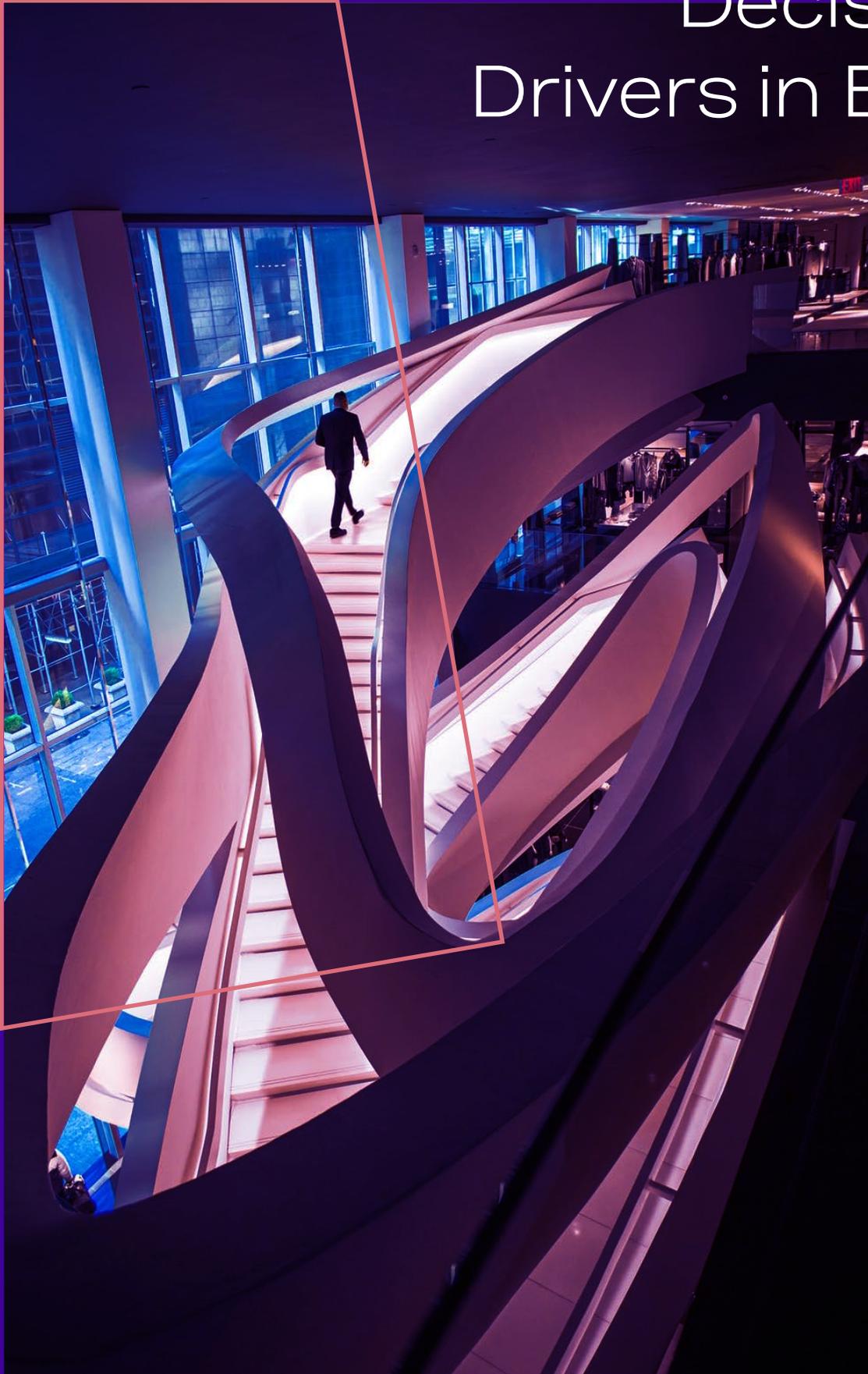
As previously mentioned, a common point of discussion has focused on the similarities between B2B and B2C, and what can B2B learn from the more progressive, technically innovative and slicker experiences associated with B2C. In this research, respondents were asked what B2C aspects they would like to see in the B2B journey.

Way out in front was faster delivery, cited by almost half (49%) of survey respondents. In these COVID-19-impacted times, that may be no surprise. What did take us aback somewhat was the fact this was 15 percentage points ahead of the second selection of more product choices. Here are the top 3 leading reasons cited:

Faster delivery – **49%**
More product choices – **34%**
Easier returns – **32%**

Meanwhile, over 7 in 10 (72%) respondents agree that they expect a similar experience buying on a B2B site as they do on a B2C site. Interestingly, looking at the other side, 3 in 5 (61%) respondents agree that they think B2C customers should be able to buy on a B2B site at a standard price.

Section 3: Decision Drivers in B2B





Chapter 1: Getting hold of products is vital

The most important factor when it came to buying B2B products online was fast delivery (45%). Price came a close second with 44%. Product availability was not far behind, at 41%. Other important aspects to respondents were the ability to find and select products easily (29%), transparent pricing (26%), order tracking (25%) and easy check-out (23%).

Going back to the previous point about KPIs, we again see that although cost savings and purchase efficiency are the most important KPIs against which our B2B buyers are measured, B2B purchasers also want their products quickly! Time is money still holds true, it would appear.

45% of B2B shoppers said that fast delivery was a key factor in their purchase decision-making.

What are the most important factors for B2B buyers when buying products online?





Chapter 2: What influences purchases?

When it comes to what influences purchasing from suppliers, B2B shoppers identified customer ratings and reviews (22%) as the number one factor in making their decision.

In second place, came "following the example of the leading business in the industry" (21%) - which is fine providing that you know for sure that their decision-making is sound and that the learnings are both relevant and applicable to your business. What is clear is that creating industry authority and winning trust is advantageous for online sellers in expanding their business.

Once again, the role of the physical sales representative is called into question, with only 9% of respondents being influenced by them. And this percentage is the same as social influencers who also had an impact of 9% on B2B buyers, conversely reinforcing the growing role that social media, and by association social commerce, is likely to play in B2B in the future.

“ There is currently limited consensus around how social commerce and social media and B2B selling work together. And to a degree, mentioning “social” alongside B2B tends to jar for many B2Bs. However, what is clear is that even in the B2B sector, influencers and social media play a role. Coupled with that, the social commerce channel is becoming more and more important in B2C, and it’s not a huge stretch to think that B2B businesses need to start thinking about these channels. With this in mind, it’s important for B2B businesses to think ahead and not get left behind. Consider who your influencers might be. Make sure that you choose the right person(s) to represent your brand and that they align with your overall strategy.

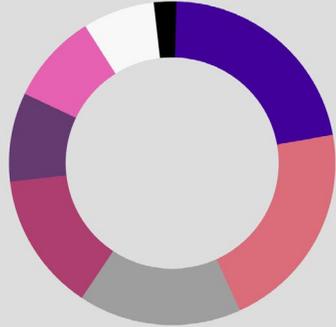


Chloe Cox
Social Commerce
Consultant



What influences B2B buyers' online purchasing decisions?

- Customer ratings & reviews (22%)
- The leading businesses in my industry (21%)
- Nobody/nothing influences me the most when purchasing from suppliers (17%)
- Family & friends (14%)
- Social influencers (9%)
- Account managers (9%)
- Colleagues & peers (8%)
- Other (2%)



9% of B2B online buyers are influenced by social media influencers.

Chapter 3: What are the pain points?

In order to establish a strategic roadmap for B2B sellers, it's important to look at what the customer pain points are when purchasing online.

Over a third (36%) said inventory (product not in stock) was the biggest pain point, followed closely by delivery information (35%).

But what about size when it came to pain points? Although a pain point for a large percentage of B2B buyers, the frustration related to delivery information was felt by a higher percentage of B2B buyers in big businesses.

Another friction area experienced by a high percentage of all sized companies was finding what they wanted, but a higher percentage of B2B buyers from both smaller and medium-sized businesses felt this pain more acutely than B2B buyers in big businesses.

When it came to comparing products, this was less of an issue for big business buyers than for their smaller and medium business counterparts. More buyers from the medium and larger businesses also felt more pain when it came to a lack of customization too.

And it was speed of delivery that was the most important factor when abandoning their cart or not completing their purchases; 44% of respondents failed to complete their purchase or abandoned their cart as a consequence of the speed of delivery, with price the second highest factor for non-completion (42%), and 41% citing inventory (product not in stock) as their reason for non-completion.

When it came to the size of the business, the notable differences lay in inventory (product not in stock) which prevented the purchase of a higher percentage of small (46%) and medium (43%) B2B buyers vs. 32% for large businesses.

Speed of delivery on the other hand was less of a purchase completion blocker to smaller businesses (34%) than to medium (48%) and large B2B buyers (52%).

41% have abandoned their cart because of inventory (product not in stock).

B2B BUYERS' ONLINE PAIN POINTS



Section 4: Technology for the Future



A B2B purchaser is, obviously, also a B2C consumer in their off hours, and as such their experiences in B2C influence their expectations when operating in B2B. This is evident too in their desires for technology in the B2B purchasing experience.

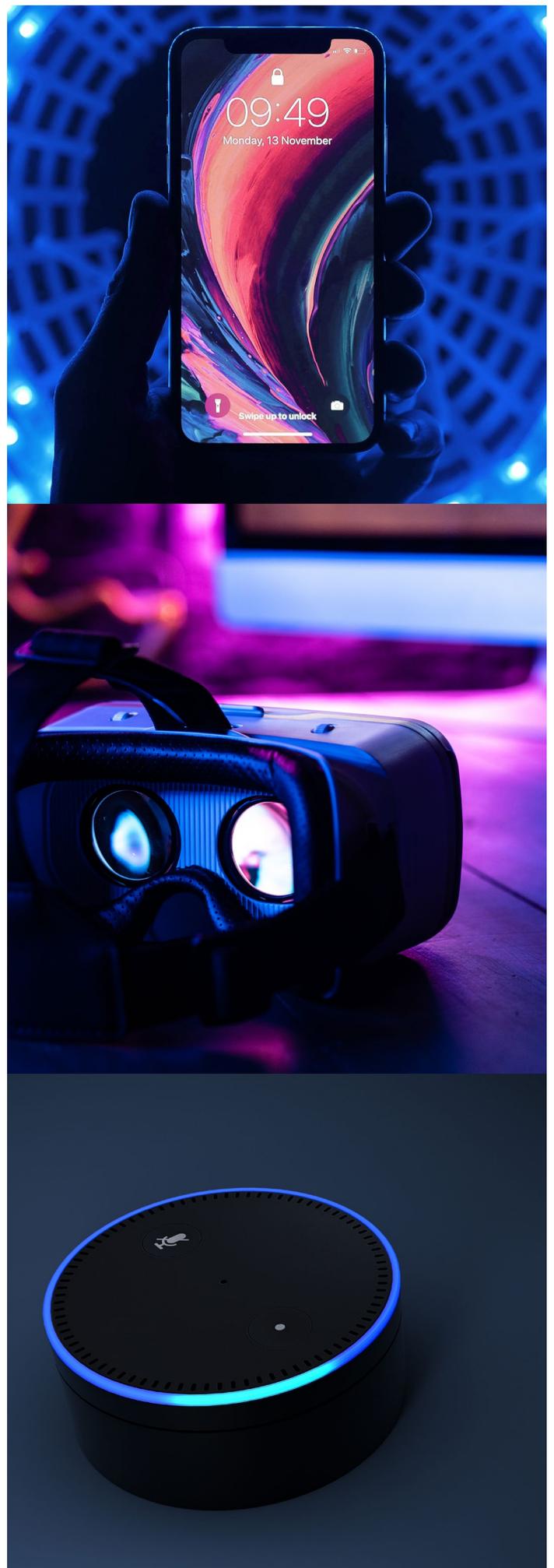
Almost two thirds (65%) of respondents use mobile technology as B2B customers and 68% think B2B suppliers and manufacturers should use more mobile technology to enhance their experience. For instance, some mattress manufacturers use mobile video conferencing technology to sell products to their retailers via online walk throughs.

Nearly 2 in 5 (39%) use voice and augmented reality / virtual reality, while 40% think the B2B purchasing experience should include more augmented reality / virtual reality technology. For example, some companies have used AR interactive catalogs to bring their products to life.

And over half (52%) think voice technology should be used more. For instance, Salesforce and SAP are using voice technology to enable sales staff to instantly add data to their sales systems.

These technologies certainly have a role to play in helping make the online B2B purchase journey less complicated, as has been previously suggested.

What's also clear is that B2B sellers need to keep up to speed with changing desires and channels in the consumer world. It is vital, therefore, especially due to the B2C / B2B crossover, that B2B businesses continue to innovate with their online offering.



Conclusion



Conclusion:

So there you have it – a snapshot in time (admittedly a very strange and challenging time) of the online B2B shopper. And while the B2C shopper shares many of the same findings and insights, there are clearly some significant differences. To help steer the right course of actions, here are the areas where we believe B2B sellers should be focusing their attention:

What B2B organizations need to do:

If not offering online sales already, you need to quickly scale up your eCommerce capabilities or risk losing your B2B customers.

- Talk to our Consultancy team about how you can quickly set up your online operation. Connect with Dwayne Doshier.

For those already operating online, review your site's UX to ensure that simplicity reigns and B2B shoppers can easily purchase from your site.

- Speak to our CX team about how they can help you improve and optimize your online sites. Connect with Matt Collins.

Content is key – B2B shoppers spend a significant time researching their purchases, and this includes rich product content and the usage of ratings and reviews. An audit of content must be conducted to ensure that B2B shoppers have access to the information they need to make the right decisions.

- Speak to our Content team about running an audit of your content and building a strategic roadmap for improvement. Connect with Matt Collins.

Delivery is vital – especially right now. B2B sellers must ensure that they can deliver their products quickly, reliably and compliantly with respect to COVID-19 measures, be that via delivery mechanisms that they own or via third parties.

- Talk to our Consultancy team about how delivery can be optimized to ensure that B2B shoppers get the products that they need as quickly as is possible. Connect with Dwayne Doshier.

B2B businesses must keep at the cutting edge of online commerce technology.

- Talk to our Innovation team about the newest consumer trends and technologies, and how we can get you using new channels. Connect with Chris Kostakis.

With fewer B2B shoppers using physical sales representatives, think about how their knowledge and support can be transitioned into the digital environment.

- Talk to our Consultancy team about how to transition representatives from physical to digital services. Connect with Dwayne Doshier.

Having a robust, resilient and tested online presence is a must.

- Talk to our Support team about how they can help to manage the performance of your sites and ensure that they are ready for any traffic or orders peak (be it expected or not). Connect with Chad Carlson.

As in the B2C market, B2B organizations must think across channels and must increasingly consider the role that Amazon will play.

- Speak to our Marketplace team about how to optimize content and performance on Amazon for B2B products. Connect with Eric Heller.

COUNTRY COMPARISONS

While this report focuses on the US market, we thought it might be useful to share some of the key stats from the other countries involved in this research.

	 US	 UK	 AUSTRALIA	 SPAIN
Number of respondents	200	208	200	202
% that online B2B shopping increased in the last year	22%	24%	15%	19%
% of B2B purchases made online	48%	46%	37%	54%
% of respondents said that buying online is more complicated than offline	45%	43%	42%	31%
% of B2B buyers said that their purchasing job would be made easier with real-time inventory availability	43%	36%	33%	40%
% start their purchase process on vendor / supplier portals and online catalogs	34%	36%	39%	27%
% start their purchase process on Amazon (B2C and B2B sites)	41%	28%	25%	39%
% purchase through suppliers' online portals	67%	54%	56%	49%
% buying directly from sales reps	20%	16%	18%	20%
% that believe that online marketplaces like Amazon are more "convenient"	73%	74%	75%	73%
% that have switched supplier for all purchases because of COVID-19	20%	18%	25%	27%
% of B2B shoppers switched suppliers during the COVID-19 outbreak because the existing supplier was not able to offer online ordering	30%	43%	43%	25%
% that don't currently buy through Amazon Business, but intend to in the future	40%	59%	63%	50%
% of B2B shoppers have abandoned their cart because of inventory (product not in stock)	41%	44%	37%	36%

ABOUT WUNDERMAN THOMPSON COMMERCE

Wunderman Thompson Commerce is a global eCommerce consultancy of 1500+ commerce experts across more than 20 offices, united in helping clients win through eCommerce.

We define and deliver digital growth for ambitious brands, retailers and manufacturers. The cornerstone is inspiration – and we seek and promote it in all that we do.

Our global eCommerce consultancy offers strategic clarity, technology enablement and creative insight and delivers winning commerce capabilities across all major channels: marketplaces (including Amazon), online retailers, D2C and social commerce.

We help brands increase results at scale on Amazon, deliver eCommerce strategy and optimize multichannel journeys. We inspire customer engagement and transactions at every touchpoint, while deploying and integrating world class technology from key strategic partners including Adobe, SAP, Salesforce, HCL and IBM.

Clients include AkzoNobel, DFS, Halfords, Jumbo, RXBAR, Sainsbury's, Selfridges, Specialized, Tempur and Tiffany & Co.

We are part of Wunderman Thompson, a WPP agency which is part creative agency, part consultancy and part technology company, and whose experts provide end-to-end capabilities at a global scale, to deliver inspiration across the entire brand and customer experience.

Wunderman Thompson is a WPP Agency (NYSE: WPP).

For more information, please visit us at www.wundermanthompsoncommerce.com

and follow us on our social channels via [Twitter](#), [Facebook](#), [LinkedIn](#), and [Instagram](#).

For UK sales enquiries:

+44 (0)20 3858 0061

For European sales enquiries:

+31 (0)294 461 300

For North America sales enquiries:

206-641-7220

sales@wundermancommerce.com

SERVICES TO SUPPORT BRANDS AND RETAILERS

CUSTOMER EXPERIENCE

Inspiring transactions across the journey.

In putting the customer at the heart of every journey touchpoint, customer experience must not only work, but inspire both action and transaction. Our ability to create and support these customer journeys is born of science and commercially driven – we create optimized, multichannel customer journeys that drive engagement and transaction at every point. Key to this is our unique methodology known as “Commerce Experience Design” that exploits the synergies between Interface Design, User Experience Design and Service Design. [READ MORE](#)



[Connect](#) with our Director of Customer Experience, Rachel Smith.

ECOMMERCE STRATEGY

As a growth partner, we help retailers and brands strategize for high-performance eCommerce through a suite of proven end-to-end services.

We help enterprise-level organizations to transact more business online by designing and implementing high-performance, future-ready digital strategies. This starts with defining a balanced multichannel strategy, aligned to your vision, and the planning of eCommerce solutions to support your growth ambitions and customer journeys. [READ MORE](#)



[Connect](#) with our Strategy Director in Europe, Krantik Das or our Chief Strategy Officer in North America, Adam Brown.

MARKETPLACE STRATEGY AND MANAGEMENT

Supporting and advising brands on how to increase results globally, at scale, on Amazon, Tmall and other online marketplaces.

Wunderman Thompson Commerce is the leading provider of global eCommerce marketplace services and the founding partner of the WPP ACE, a Center of Excellence for Amazon. We run the largest global consultancy helping brands succeed on Amazon, Tmall and other marketplaces. We have helped 550 brands excel on Amazon over the last decade and our 100+ experts across 25 nationalities are helping clients drive annual online revenue of more than \$2bn on Amazon's marketplace alone. We have the people, processes and tools to deliver industry leading performance for our clients. [READ MORE](#)



[Connect](#) with the Head of WPP's Center of Excellence for Amazon in Europe, Helmut Rieder or our Chief Knowledge Officer, WPP Center of Excellence for Amazon in North America, Eric Heller.

MANAGED SERVICES: PEAK SELLING SUPPORT

Protecting your most important business asset – your eCommerce website – so you can focus on what you're best at.

Our managed services and applications are tailored specifically to client requirements and budgets, so they can concentrate on their core business, assured of powerful eCommerce performance through the support of highly experienced teams, including commerce architects and software engineers. A key service is our peak operations support. As one of the leading authorities on peak selling, we support many of the biggest retailers through the Black Friday and holiday sales periods. [READ MORE](#)



[Connect](#) with our Head of Service Operations, Mario D'Cruz.

SERVICES TO SUPPORT BRANDS AND RETAILERS

INNOVATION AND FUTURE-READY TECHNOLOGY

Reviewing, testing, and deploying innovative technologies and solutions to keep businesses ahead and future-ready.

We explore, recommend and implement workable innovation, testing ideas, methodologies and leading-edge technologies to help businesses shape their own future and stay ahead. After all, how can you navigate the future of eCommerce without an understanding of the tech and trends shaping it? [READ MORE](#)



[Connect](#) with our Head of Innovation, Naji El-Arifi.

ECOMMERCE PLATFORM TECHNOLOGY

Deploying and integrating best-in-class technology to support your eCommerce operations.

Through the implementation of world-leading commerce platforms underpinned by future-ready technologies, we're able to support the most ambitious client strategies. We've been doing this for more than 30 years – with hundreds of successful eCommerce implementations to our name, including the world's largest fashion and B2B platforms and grocery replatform. [READ MORE](#)



[Connect](#) with our Global CTO, Glen Burson.

DIGITAL INTELLIGENCE

Delivering insight-driven change to help your business excel in the age of the customer.

Led by an expert team of implementation, data science and optimization analysts, we help multichannel organizations manage and interpret their data in order to support insight driven change. We also work with businesses to develop the tools and processes needed to become a data-led organization that gets results. [READ MORE](#)



[Connect](#) with our Head of Digital Intelligence, Chris Longman.

CREATIVE SERVICES INC. DESIGN & BUILD

Inspiring powerful online CX and industry-leading websites.

We see creative inspiration as the critical agent of change, actions and transactions across stunning customer journeys time and time again. And drawing on the arguably unparalleled creative heritage of Wunderman Thompson, we're uniquely able to do this, applying our multiple award-winning creative credentials to front-end build, including websites, mobile sites, app builds and more. [READ MORE](#)



[Connect](#) with our Head of Experience Design, Mike Rokes.

SOCIAL COMMERCE

Introducing a new revenue stream by helping brands capture and sell to new audiences through social media.

Social platforms have evolved and selling has become an active function in order to capture shoppers – particularly Gen Z and Generation Alpha. Consumers can now buy through the likes of Instagram, Facebook and Pinterest. Wunderman Thompson Commerce is working with leading retailers and brands to optimize engagement and trigger transactions on these social channels. [READ MORE](#)



[Connect](#) with our Social Commerce Consultant, Chloe Cox.

PRODUCT INFORMATION MANAGEMENT

Creating the best CX across all touchpoints, promoting the best sales catalog for every device.

We can help your business implement a PIM system by recognizing what your customers are looking for when they buy online. We offer deep knowledge of PIM strategy, solutions design, integration and implementation. We partner with retailers, manufacturers and distributors to help them improve their customer experience, product data, operational processes and profitability. [READ MORE](#)



[Connect](#) with our Global PIM consultant, Deniel Vijverberg.

SERVICES TO SUPPORT BRANDS AND RETAILERS

DIGITAL TRANSFORMATION AND TRADING

Delivering digital commerce excellence for brands and manufacturers, through business transformative change and trading optimization.

The digital landscape is moving faster than anyone could have predicted, and changing consumer behavior is forcing brands to adapt. As a team of digital commerce experts, we use our combined practical experience and knowledge of running and working for major global brands online, to work collaboratively with clients, engaging and enabling operational and business teams, adapting ways of working, and transforming processes, to exploit and accelerate new capabilities, that help them win through digital.

[READ MORE](#)



[Connect](#) with Gary Wilson and Shalina Ganatra.

ENGINEERING

Our engineering practice underpins all of our technology solutions. We have specialists supporting all of the major eCommerce platforms as well as unbeatable experience in modern technologies such as SPA/PWA, headless commerce, microservices, cloud and serverless architectures. By choosing the technology solution that works best for you and keeping a laser focus on quality, we deliver beautiful, well engineered solutions that will meet your needs both now and in the future. [READ MORE](#)



[Connect](#) with Nick Vincent.

