Omnichannel 2018

Electronics and household goods

YourCX

Introduction

More and more companies recognize the importance of taking care of customer experience. In this day, it is not enough to compete in the field of products or services, because the way the service is delivered begins to be as important as what is being delivered. Regardless of the industry, customers expect increasingly higher level of service and adjustment to their own expectations. They do not want to fit in with companies, they expect companies to match to them.

In many studies carried out for our Partners, we proved how important it is to be satisfied with the services provided, how important is the ease of making purchase and to what extent satisfaction influences business indicators like revenue. In connection with growing expectations, we checked the real needs of Polish Internet users in selected market segments, the assessment of satisfaction factors and their impact on loyalty, and thus sales. We have received answers from about 50,000 Internet users on their experiences and the perception of individual companies in relation to each other.

I hope that the collected results will help us to better understand customers and encourage everyone to further develop Customer Experience programs, which ultimately serve us all.

Piotr Wojnarowicz

CEO

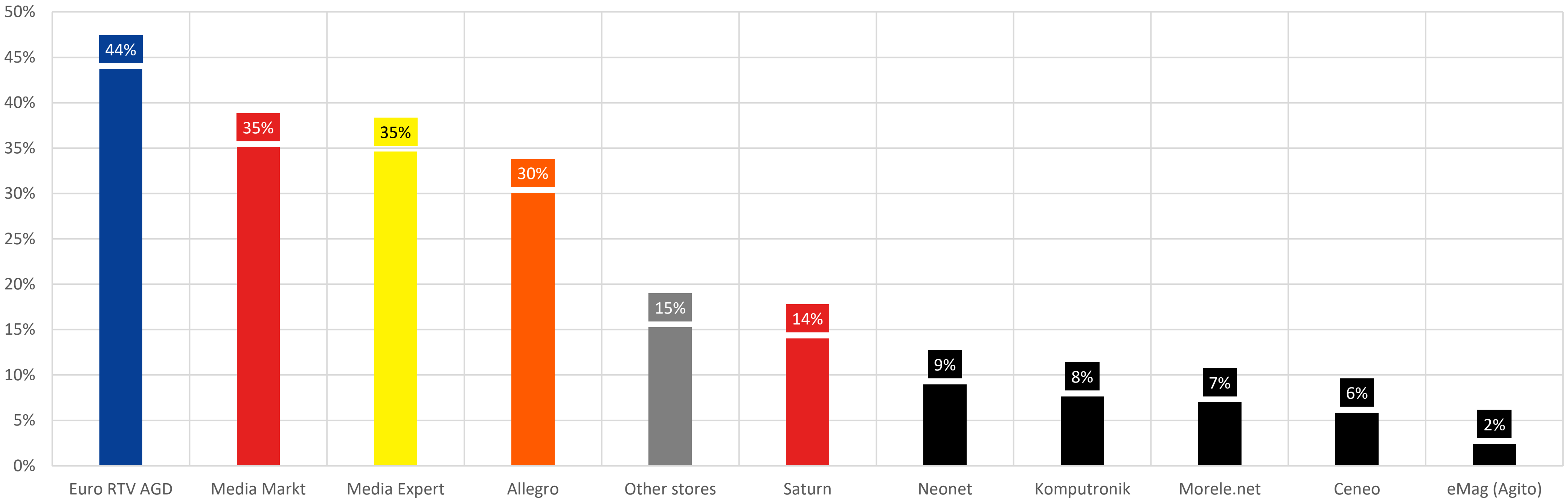
YourCX

Research methodology

- Qualitative data of a quantitative nature collected **anonymously and voluntarily**, without any gratification;
- Respondents were able to participate and fill the survey **only once online**;
- The target group of the study corresponding to the cross-sectional profile of the Internet user in Poland;
- Over **1,000,000 consumers** reached through research partners;
- Almost **50,000** completed surveys;
- A **multi-page survey**, consisting of cascading questions, with no mandatory questions;
- **Standardized** sets of questions for each of the segments with a limitation of up to 3-4 segments per survey;
- Common measure of **NPS** methodology for offline and online purchases;
- Time of conducting research: **May-June 2018;**
- Selected e-commerce segments reflect the **industries of key projects** implemented by **YourCX**;
- **Research partners**: Leroy Merlin, Decathlon, Play, T-Mobile, Multikino, Rossmann, Media Markt.

In which shops do you usually buy electronic equipment or household goods?

Multiple-choice question

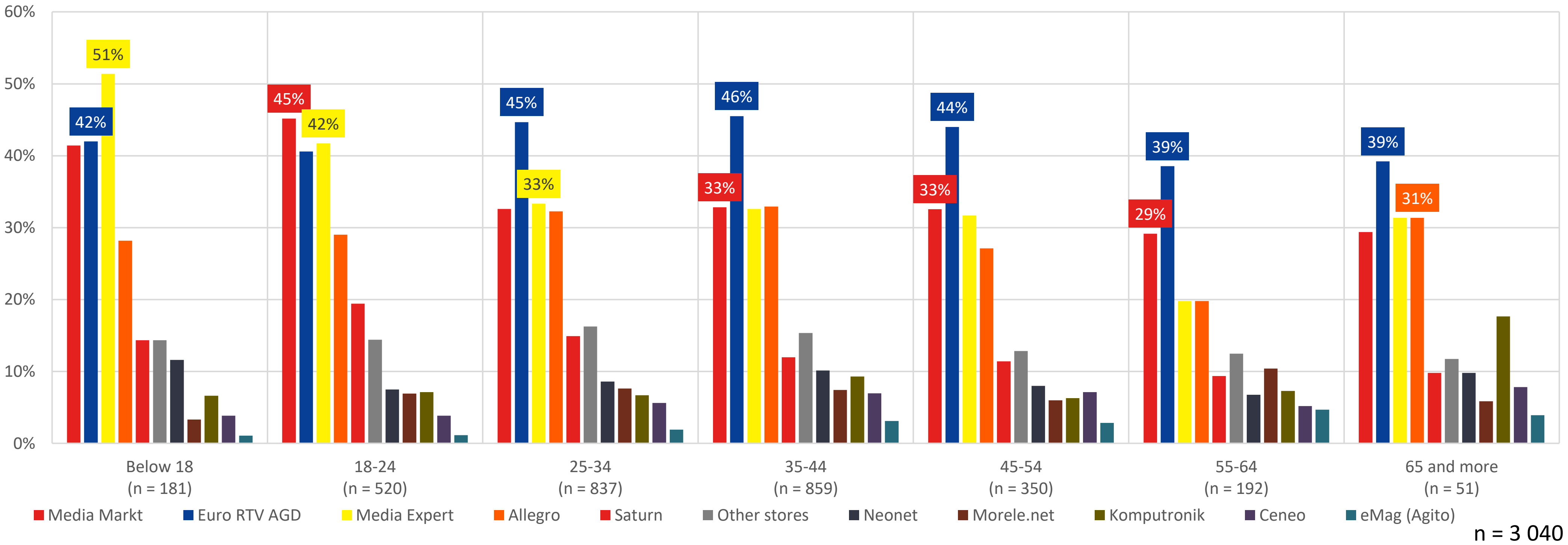


n = 4 762

The leader on the Polish market is Euro RTV AGD, where 44% of respondents usually buy. The second place is taken by Media Markt, where 35% of respondents buy. To this group we can also add Saturn customers (14%), which has been absorbed by Media Markt since 1 October 2018. This means a stronger position of this brand in the struggle for leadership.

In which shops do you usually buy electronic equipment or household goods?

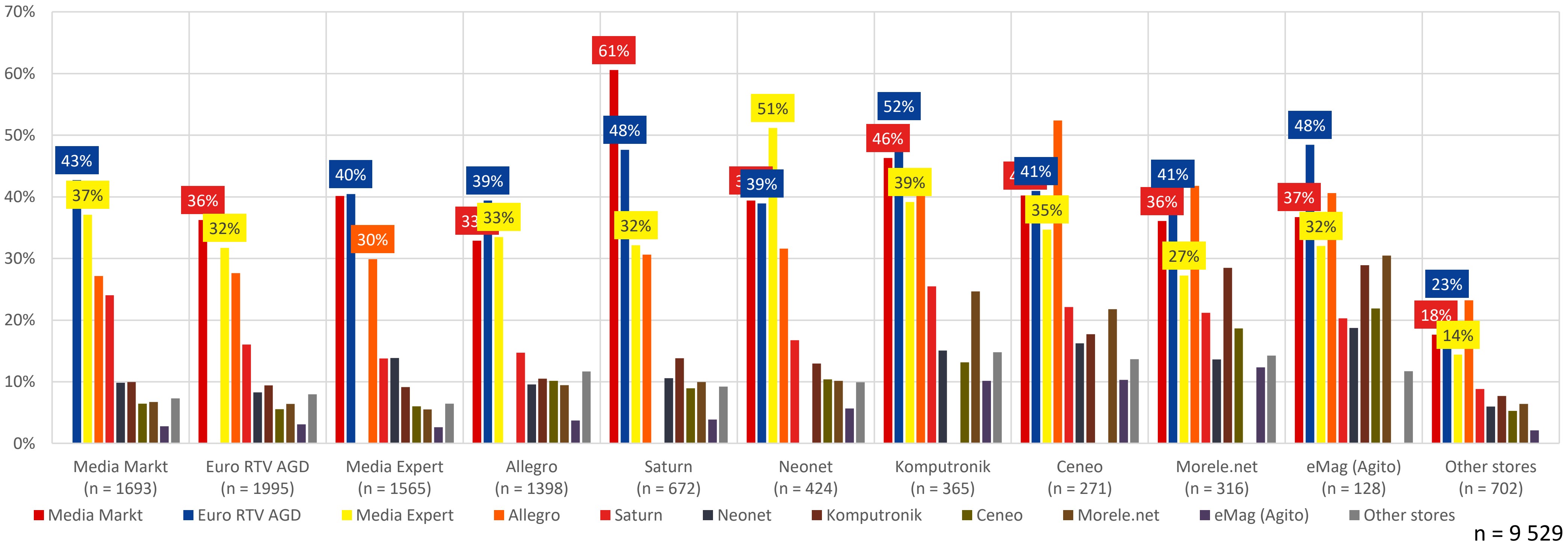
Analysis by age



The analysis of shop selection by age shows that young people definitely prefer the Media Expert chain (51% in the group of people under 18 and 42% in the group from 18 to 24 years of age). The position of Euro RTV AGD in all age groups oscillates between 39% and 46% (the largest share in the 35-44 group). The position of Media Markt is also stronger among the younger ones (this network has the highest score in the group of 18-24: 45%).

In which shops do you usually buy electronic equipment or household goods?

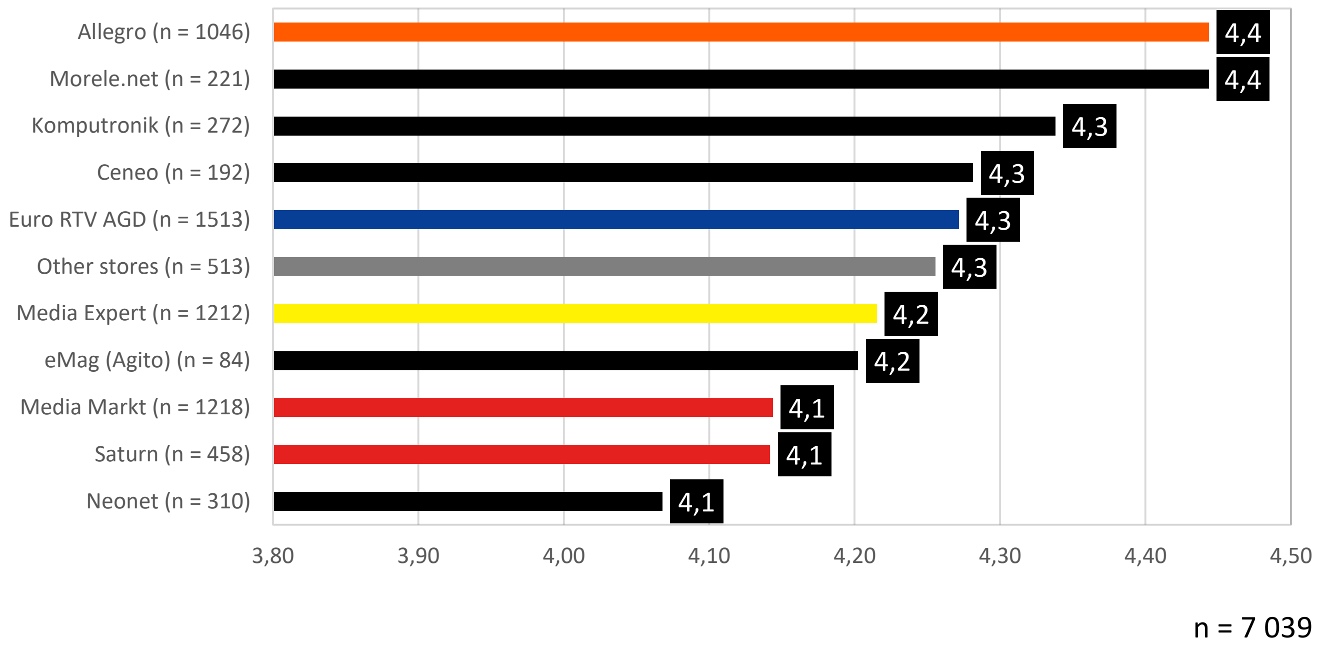
Correlations between brands



The above analysis shows where the customers of individual networks still buy. The liquidated Saturn network (we asked questions before the rebranding) clearly attracts mainly Media Markt customers. Media Markt customers also choose to buy from Euro RTV AGD (43%) and Media Expert (37%). Allegro customers also choose Euro RTV AGD (39%), Media Markt (33%) and Media Expert (33%).

Taking into account your recent purchases, to what extent have you achieved your goal?

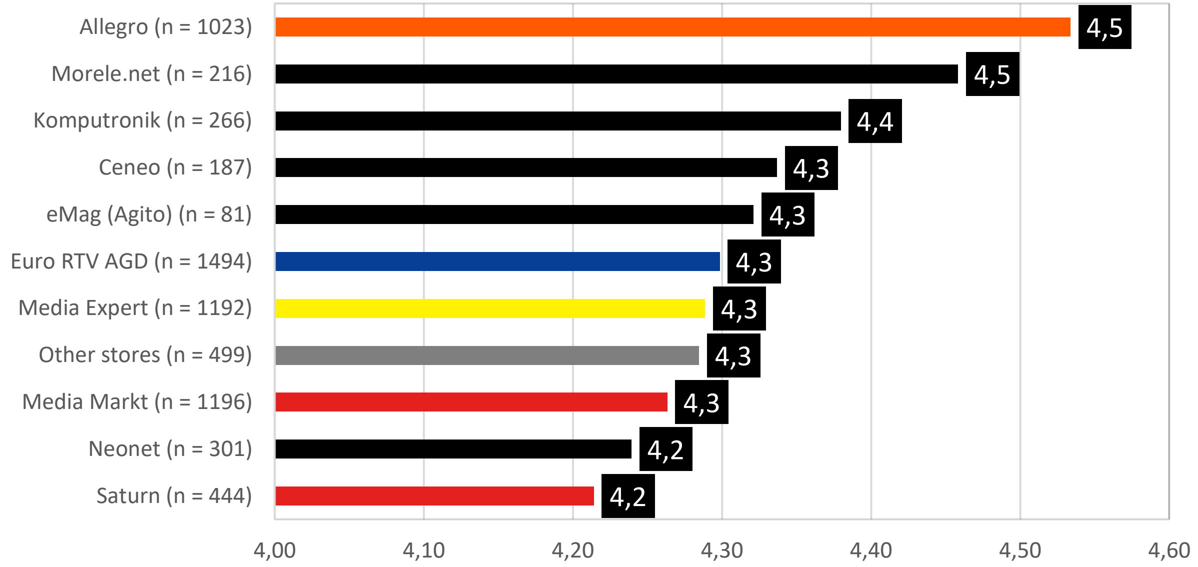
Evaluation on a scale from 1 to 5



Shopping goals are best achieved by the customers of Allegro and Morele.net. The advantage of these online shops is definitely a wide range of products, hence the high average score of 4.4. Media Markt and Saturn achieve the same average score of 4.1, which gives them the penultimate position just before Neonet.

Evaluate the ease of purchase

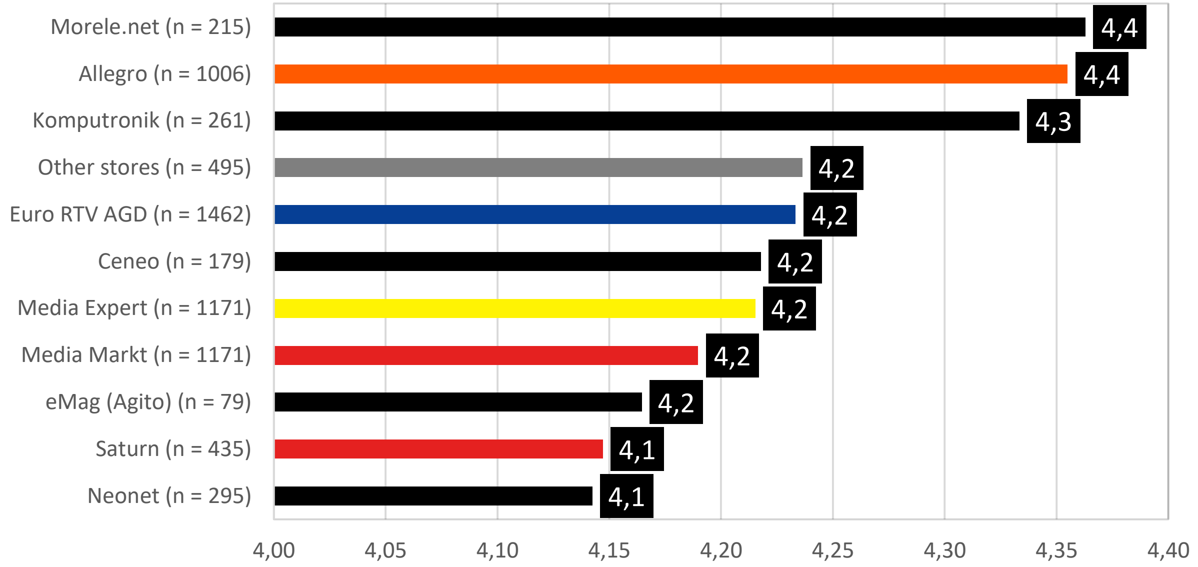
Evaluation on a scale from 1 to 5



n = 6 899

Rate satisfaction with your purchase

Evaluation on a scale from 1 to 5

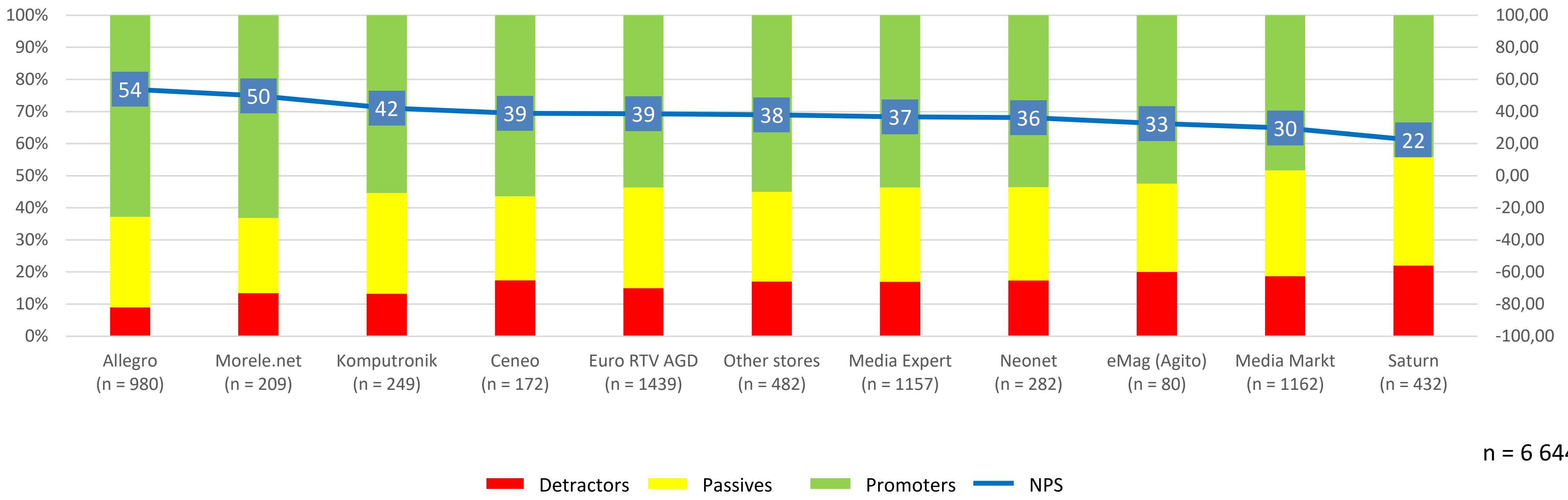


n = 6 769

Differences in the ratings of sellers of electronic products are not significant. The ease of purchase is rated best on Allegro (the average is over 4.5). Morele.net on the second place with a very similar result. Both e-commerce platforms receive a similar result from the purchase satisfaction rating (4.4). Correlations in the ratings of individual factors are very strong, regardless of the factor, the ranking looks similar.

How likely is it that you will recommend these stores to your friends?

Net Promoter Score (NPS)



NPS indicator is a universal methodology for measuring the quality of experience based on the question of willingness to recommend services of a specific company. The clear leader is Allegro with the NPS indicator of 54 (over 60% of users of this platform will be happy to recommend it to their friends). Then, in second place, another online channel-oriented salesman Morele.net, with a score of 50. Media Markt and the recently non-existent Saturn receive the lowest score, 30 and 22 respectively (every fifth customer of these networks is a Detractor).

How likely is it that you will recommend these shops to your friends?

Comment

Net Promoter Score is a methodology for assessing consumer loyalty designed to improve loyalty based on the optimization of customer experience. 9 out of 10 consumers say that the recommendations of friends and family are the most important when making a purchasing decision. Word of mouth marketing is therefore the most effective form of selling services.

The NPS indicator is based on one question: "How likely is it that you will recommend a brand / product / service to your friends?". The recipient determines the probability on a scale from 0 (would not recommend) to 10 (would certainly recommend). Based on these assessments, the respondents are divided into three groups: Detractors (those who definitely will not recommend, they choose values from the range of 0-6), Passive (satisfied, but not willing to recommend, choose 7 and 8) and Promotors (loyal fans of the brand, choosing values 9 and 10).

Larger research projects are based on crossing large amounts of data and segmentation of behaviors into groups of Promotors, Passive and Detractors. YourCX performs such analyzes, for example in relation to experiences in cinema networks, the usefulness of e-commerce platforms or the availability of offers of telecommunications network service providers. The NPS indicator can also be used in remarketing: by directing the advert to the Promoters we have a better chance that it will be effective, similarly to activities in social media.

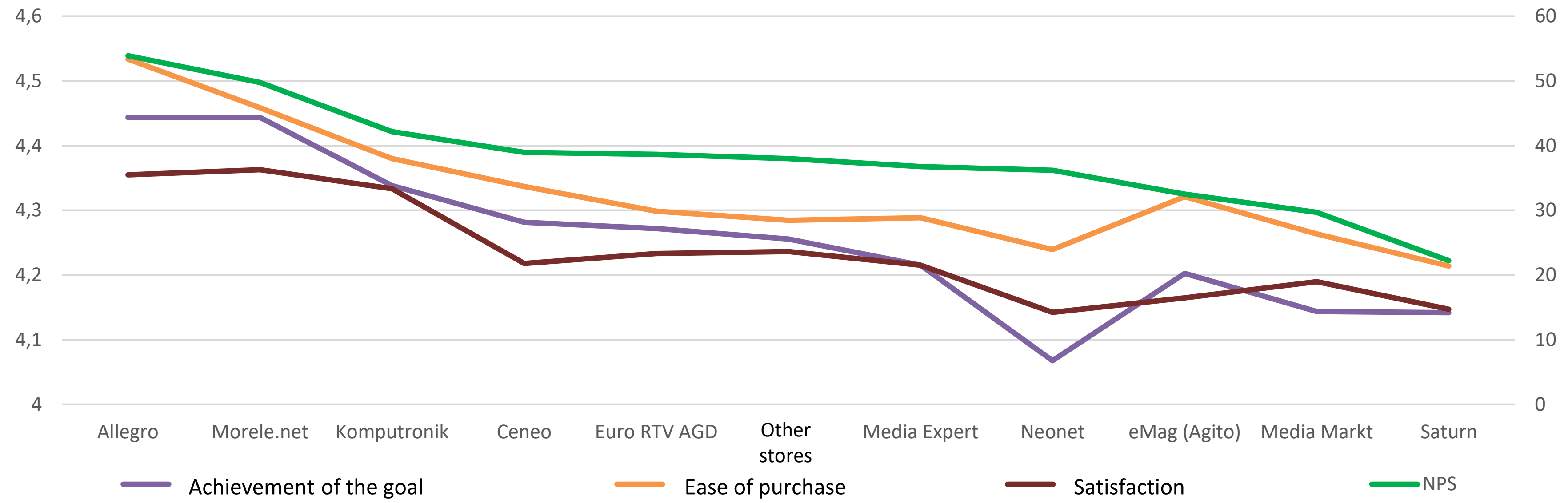
Jakub Kołaciński

Project Manager

YourCX

Correlation analysis

Dependence of the willingness to recommend on satisfaction, the degree of achievement of the goal and ease of purchase



Correlations with NPS:

Achievement of the goal = 0.58

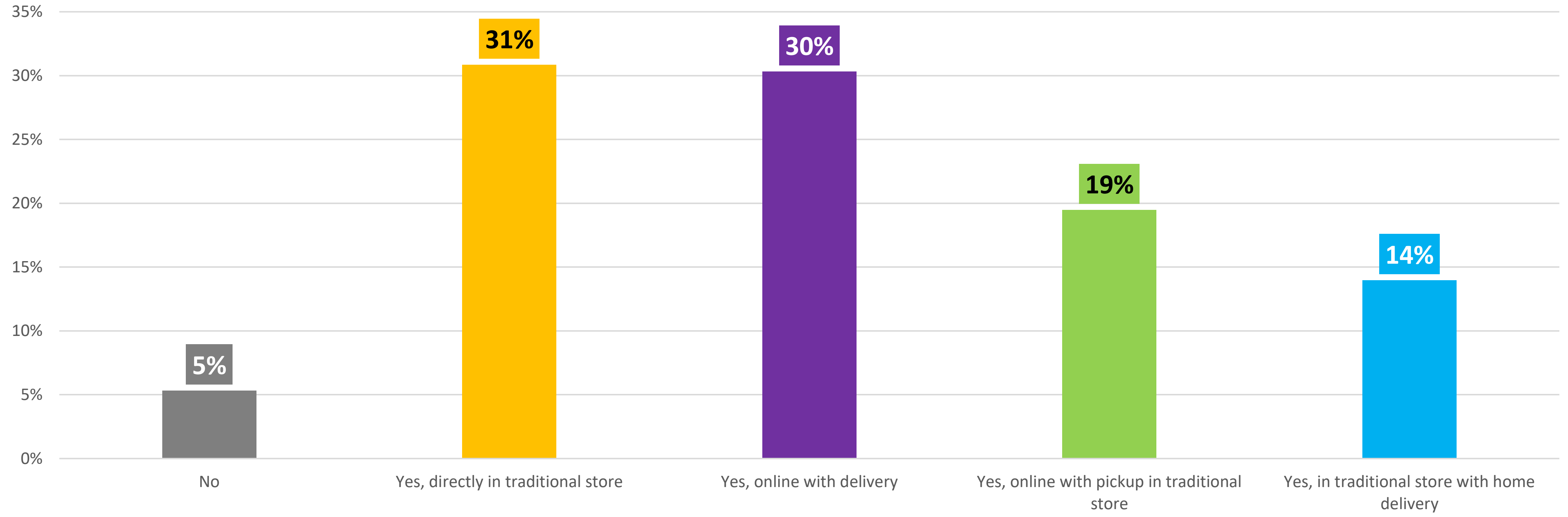
Ease of purchase = 0.59

Satisfaction = 0.67

These are very strong correlations indicating the direct dependence of the NPS indicator on satisfaction, the degree of achievement of the goal and ease of purchase. This means that conducting intensive activities related to the optimization of purchasing processes should directly affect the willingness to recommend the brand to friends and family.

Have you recently bought electronic equipment or household goods?

Single-choice question

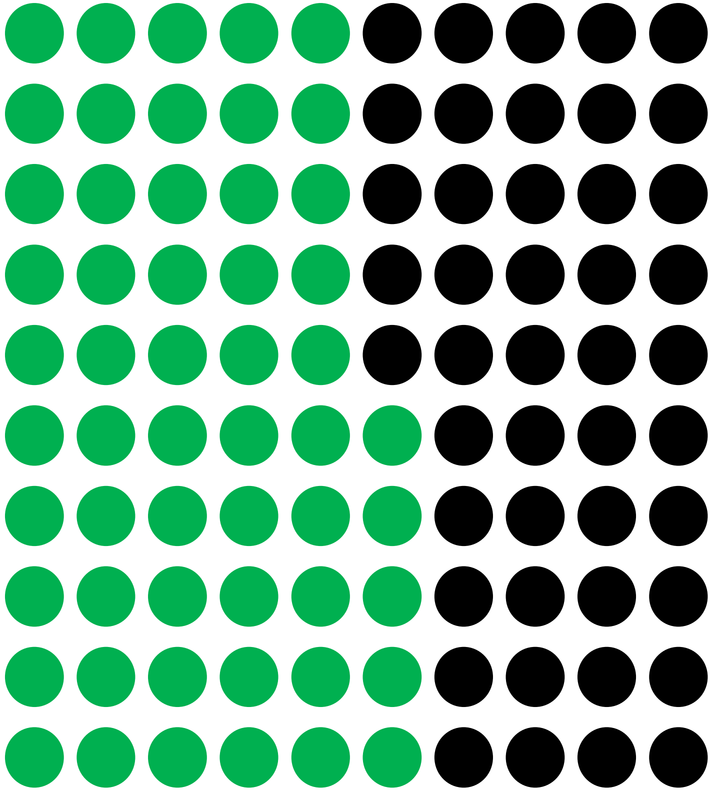


n = 3 827

Only 5% of the respondents did not buy electronic or household equipment recently. The distribution of preferences in the choice of purchasing channel is also surprisingly balanced: 31% bought directly from a traditional store and 30% via the Internet with delivery. Then 19% bought online with collection in the shop and 14% in the home delivery shop (this applies mainly to large-size equipment). This means that 95% of respondents associate their recent experience with the purchase of electronic products.

Are you looking for information on the internet before buying electronic equipment or household goods from a traditional store?

Single-choice question



55%

always searches for information online before buying at a traditional point of sale. We call this phenomenon the ROPO effect. 23% do it often, 16% sometimes, 3% rather rarely and 3% not at all.

n = 558

Are you looking for information about the offer on your smartphone while shopping in a traditional store?

Single-choice question

Always	Often	Sometimes	Rarely	Never
26%	17%	25%	15%	17%

n = 528

What information are you looking for?

People looking for information on their smartphone while visiting a traditional store. Multiple-choice question

81%
compares prices

55%
checks for detailed information

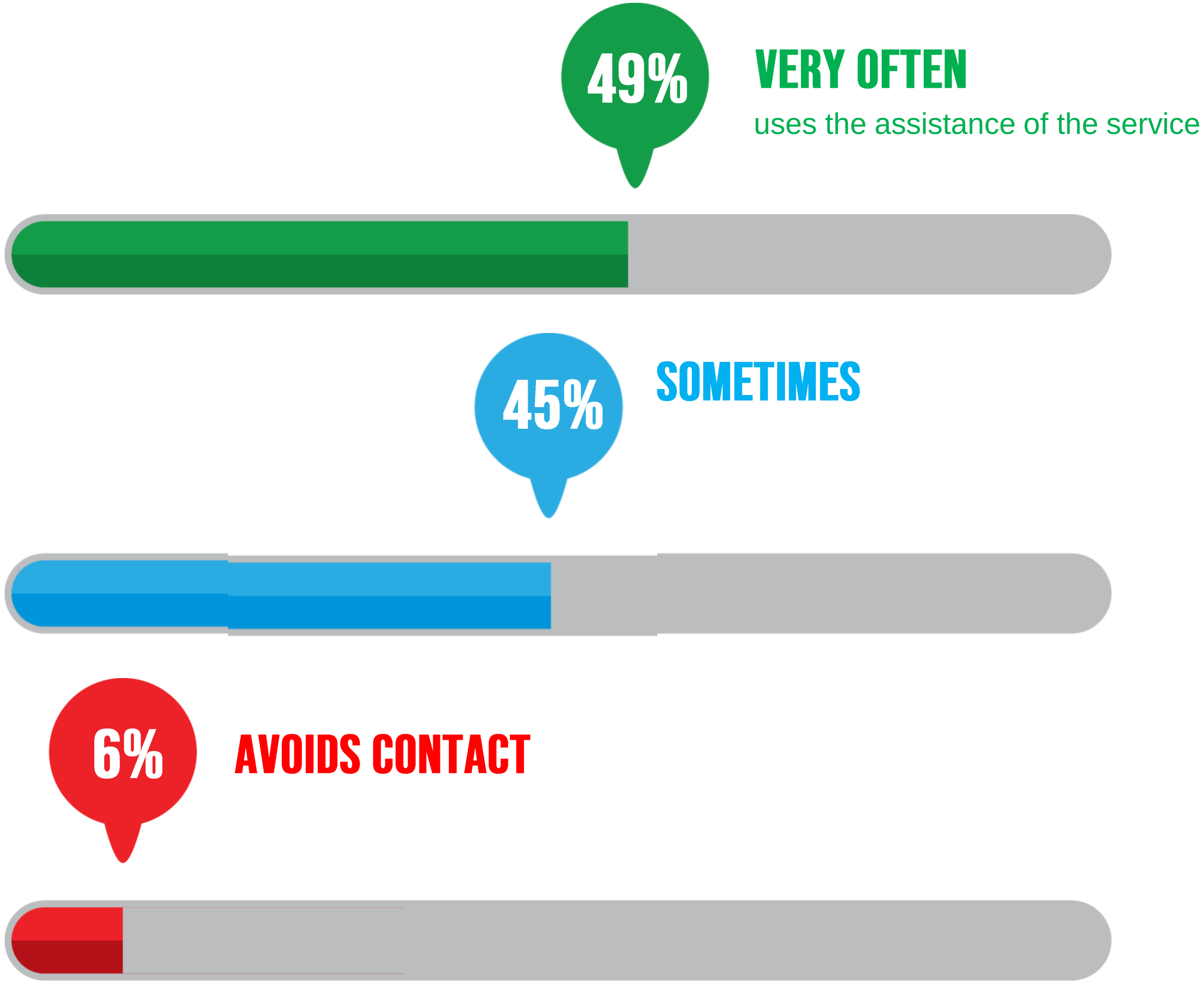
72%
looks for reviews

25%
seeks alternatives

n = 220

Do you use the help of the staff when shopping in a traditional shop?

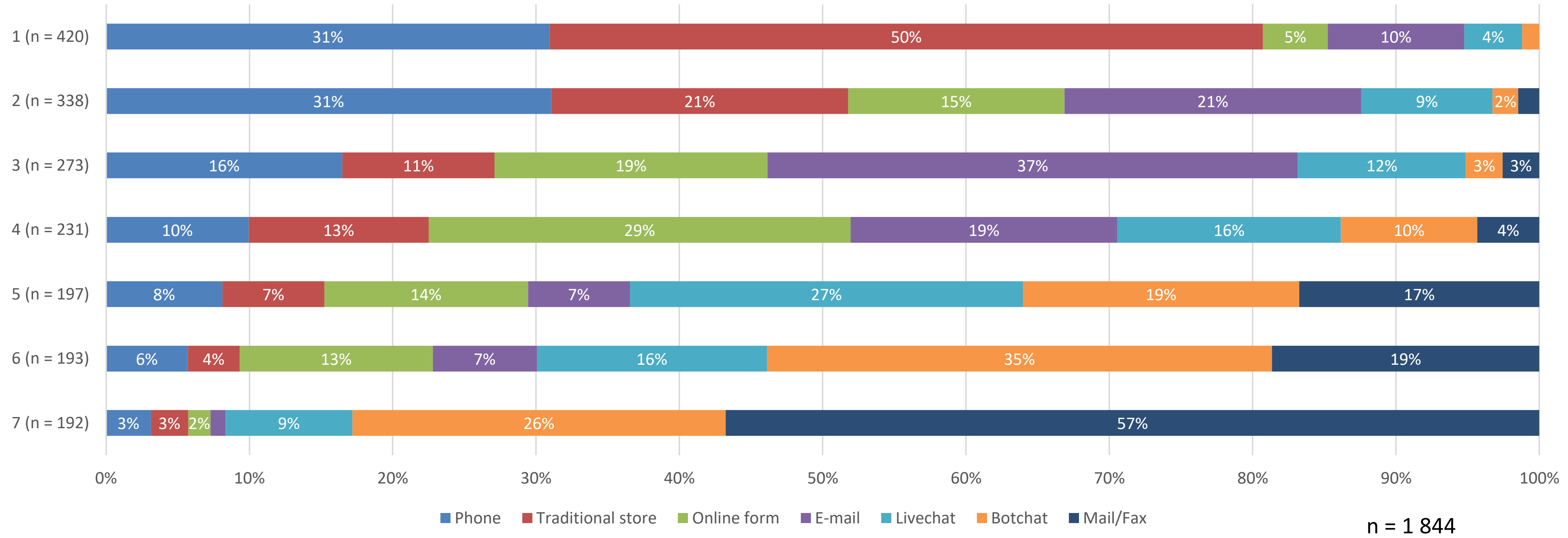
Single-choice question



n = 505

How would you like to contact a traditional store if necessary?

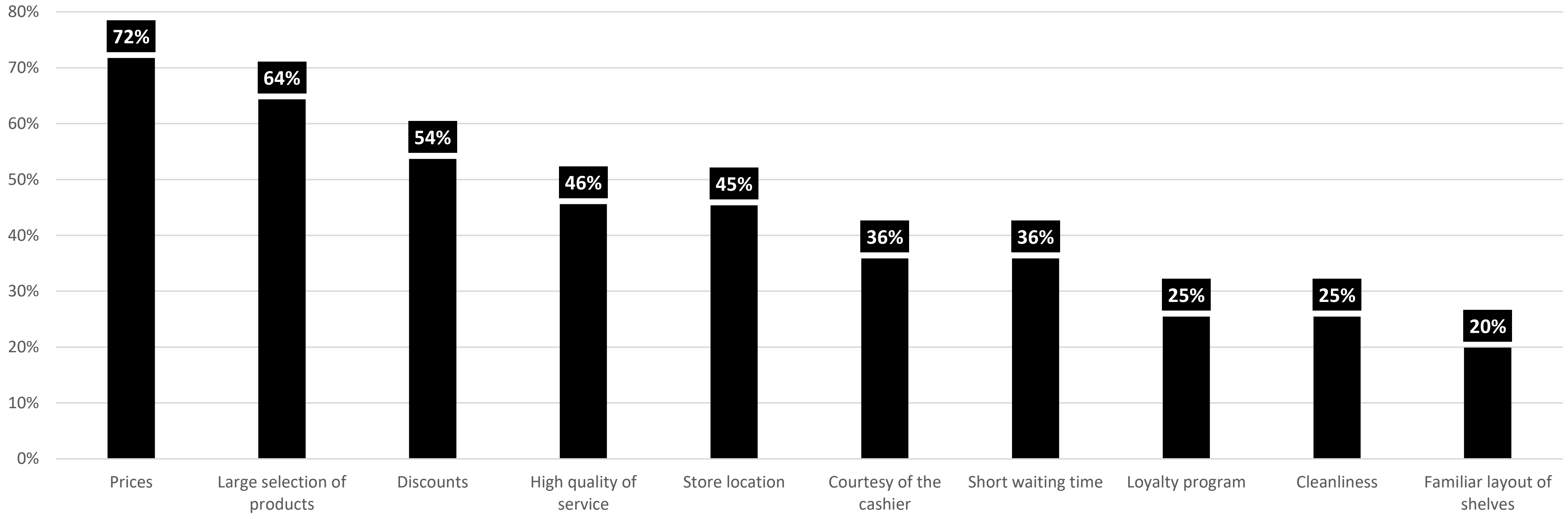
Starting with the way you prefer the most



Respondents ranked the channels of contact with a traditional store, starting with the one they prefer the most. The number one choice for 50% of respondents is personal contact in the store, 31% prefer telephone and less than 10% choose e-mail. The second choice channels are dominated by telephone contact: this form is chosen by almost 31%. The form in the online store is chosen by 15% of respondents. Botchat and written forms are the least popular.

What is most important to you when shopping at a traditional store?

Multiple-choice question



n = 432

Prices are one of the most important factors for 72% of respondents. Then a wide choice of products is indicated by 64% of respondents. Every second person also considers discounts and high quality of service to be important. Short waiting time in line (36%) and courtesy of the seller (36%) are also important factors, which to a large extent result from Customer Experience activities.

If it were possible, would you rate your visit to a traditional store by means of surveys, evaluation screens or buttons with smileys?

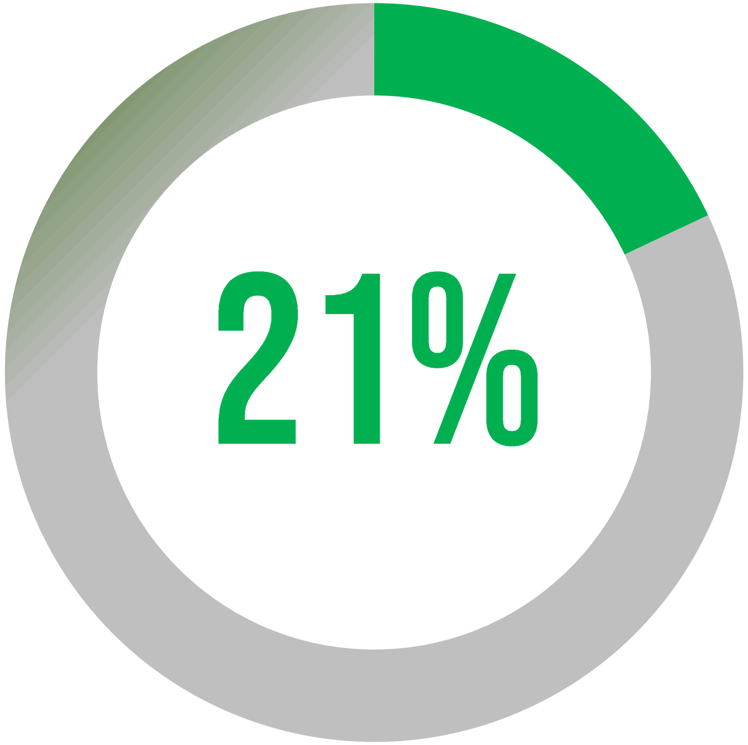
Single-choice question

50%	33%	12%	5%
If they had time and desire to do so	Very often, regardless of the situation	They would not	Will rate only in case of dissatisfaction

n = 411

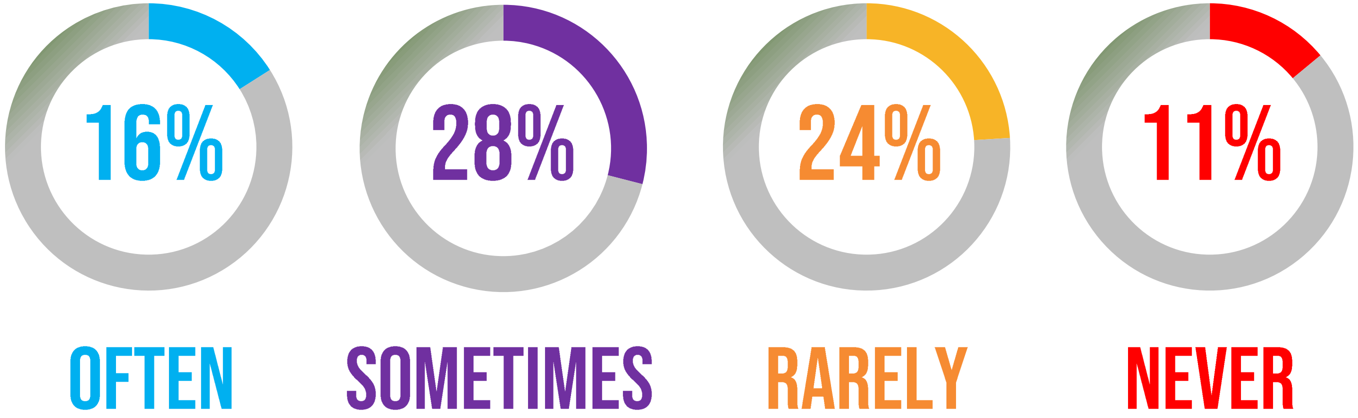
Do you visit traditional store to get acquainted with the product before purchasing electronic equipment or household goods via the Internet?

Single-choice question



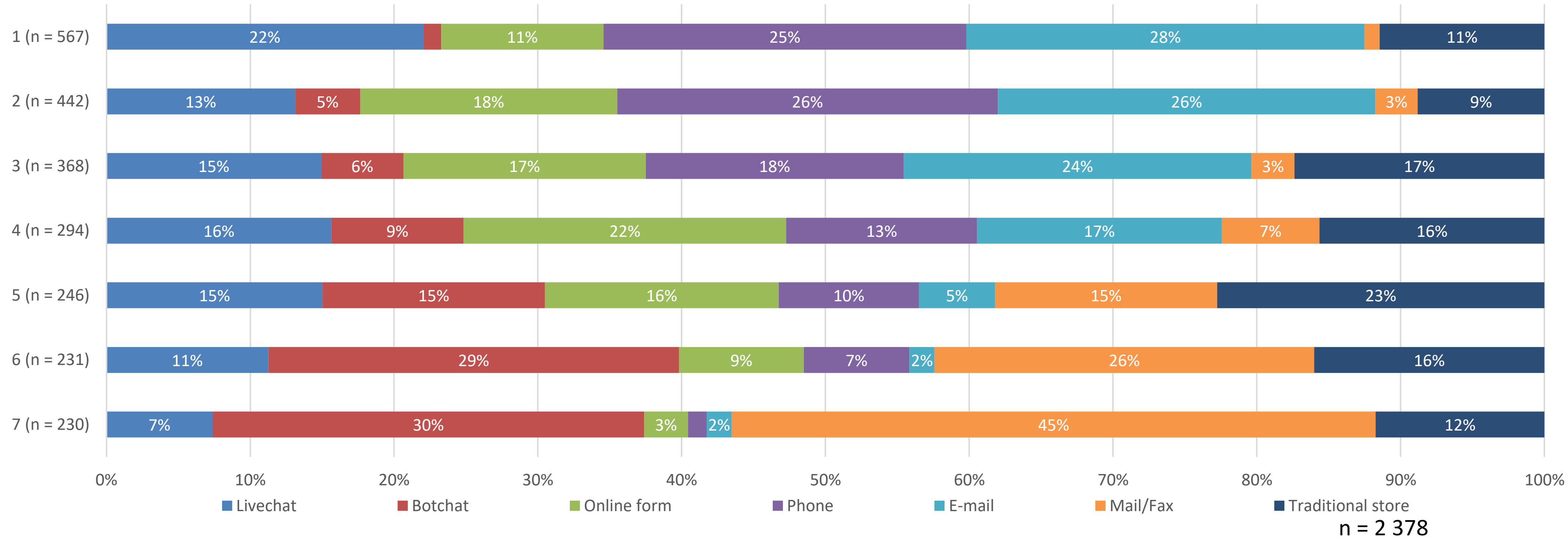
ALWAYS

visits traditional store before buying online.



How would you like to contact the online store if necessary?

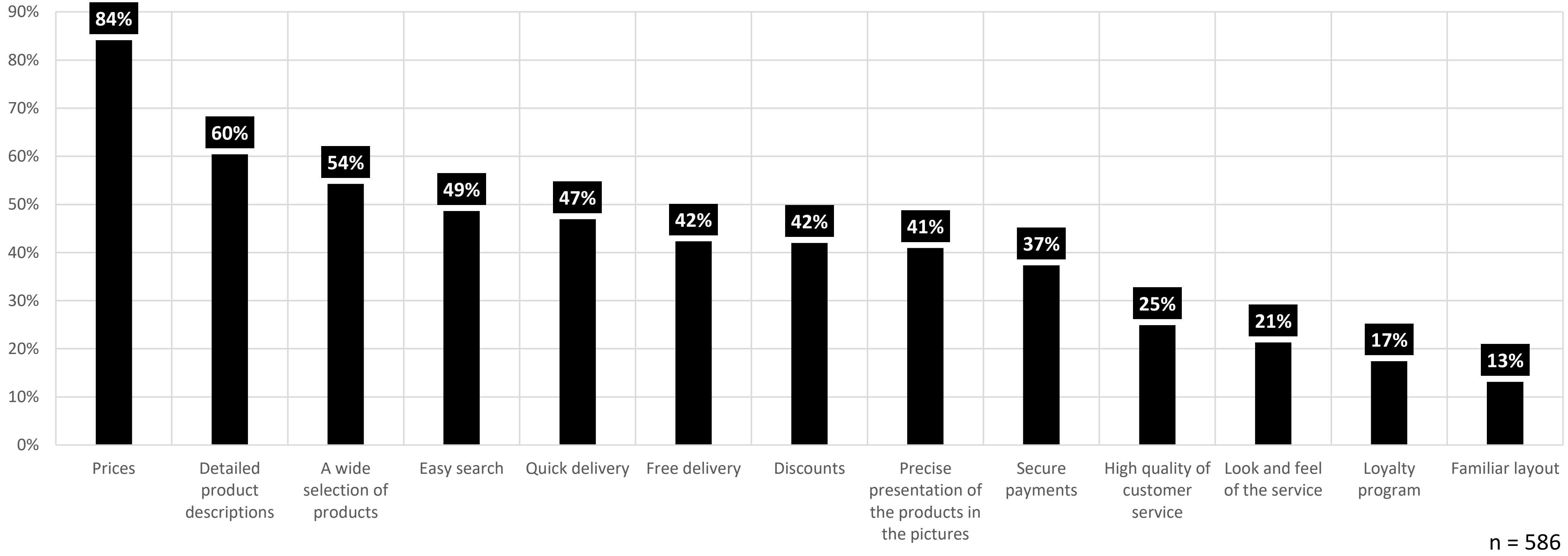
Starting with the way you prefer the most



Respondents ranked the channels of contact with the online store, starting with the one they prefer the most. The number one choice for 28% is email, 25% prefer the phone and 22% of respondents choose contact via livechat. In the group of second choice channels, phone and e-mail contact is important (26% each).

What is most important for you when shopping in the online store?

Multiple-choice question



The most important factor in the online store is the price, which will be compared by 84% of the respondents. More than a half also points to detailed product descriptions (60%) and a wide selection of products (54%). Easy search is appreciated by 49%, and short waiting times by 47% of respondents. Only 13% pay attention to the familiar layout, so customers are open to changes.

If it were possible, would you rate your satisfaction with the online shop using surveys?

Single-choice question

57%
If they had the time and willingness to

31%
Very often, regardless of the situation

7%
Would no

5%
Will evaluate only in case of dissatisfaction

n = 539

Omnichannel 2018

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Piotr Wojnarowicz

p.wojnarowicz@yourcx.io

+48 661 627 620

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