Omnichannel 2018

Telecommunication services

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.

Telecommunication services

The telecommunications industry, just like banking, is particularly dependent on the experiences and emotions of customers. This is both about maintaining the quality of services provided, which consists of a number of contact points closely related to CX, as well as purchasing decisions based on emotions. The quality of service and approach to matching the offer to your needs will make it a pleasure to stay with your favorite network.

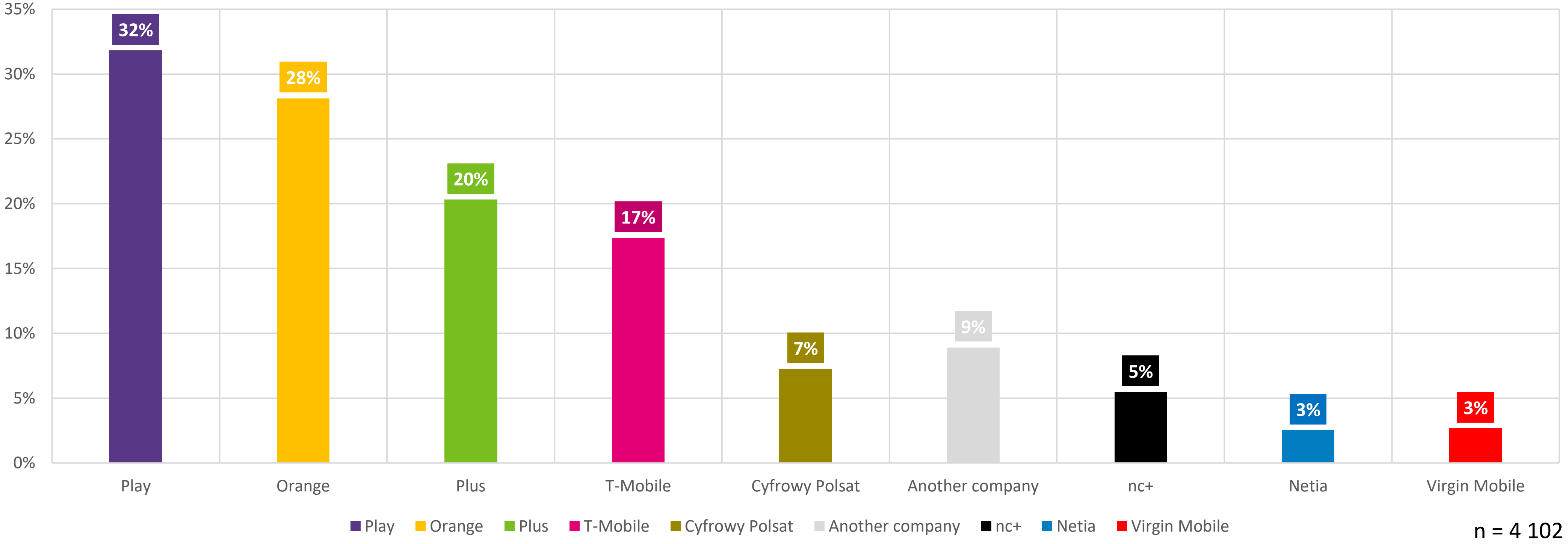
Caring for service standards is the foundation of quality, but this should not be the end of efforts for customer's favor. The research conducted for years by YourCX confirms that consumer requirements are growing. And not only in the area of experiences on the line with Customer Service Center or in traditional point of contact, but also the functionality of websites and mobile applications. The method of interaction with the company changes intensely in the process of "digitizing" the client, hence the youngest, accustomed to living online, in the event of problems avoid calling to CS and will look for help online. It is also important for them that the account and service management is convenient and failure-free.

In this report prepared by YourCX we check what customers expect, how they buy, where they will go for help and what is important to them when they are comparing different telecommunication services.

Jakub Kołaciński
Project Manager in YourCX

Which provider do you use?

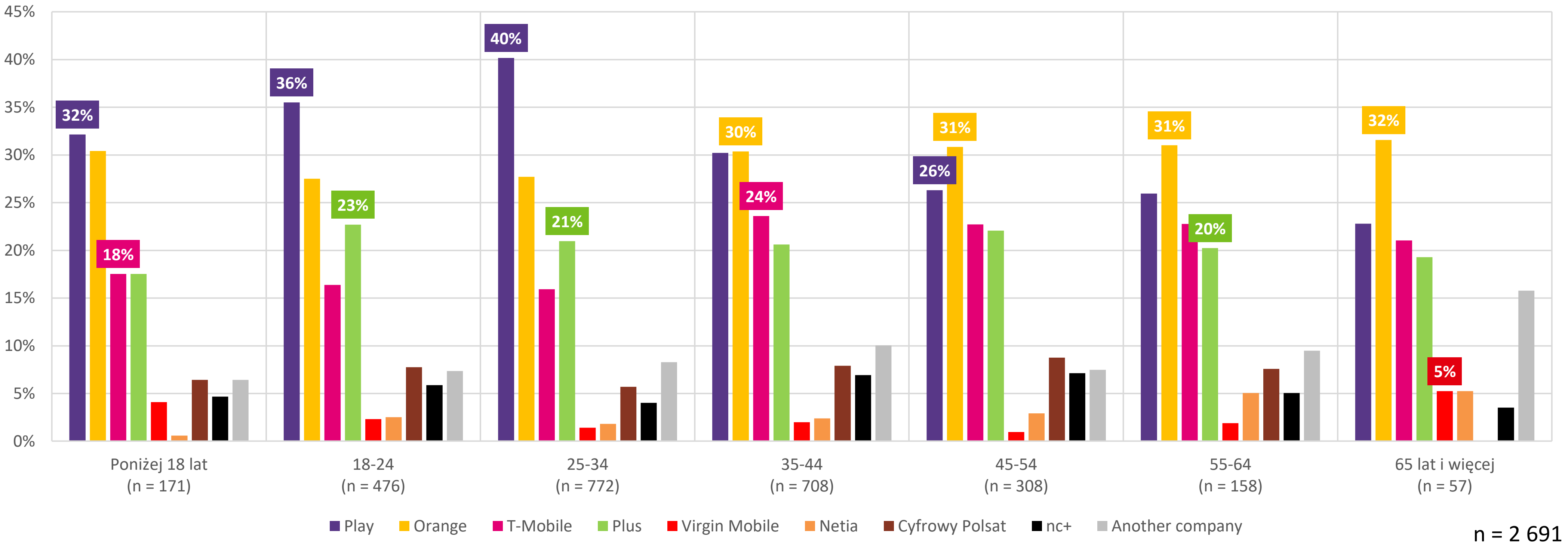
A multiple choice question



Play is the leader on the market, 32% of respondents declare using the services of this company. Interestingly, if we only consider **mobile users** (n = 581), the leader will be **Plus** with the result of 26%, overtaking **Play** by less than a percentage point for this channel.

Which provider do you use?

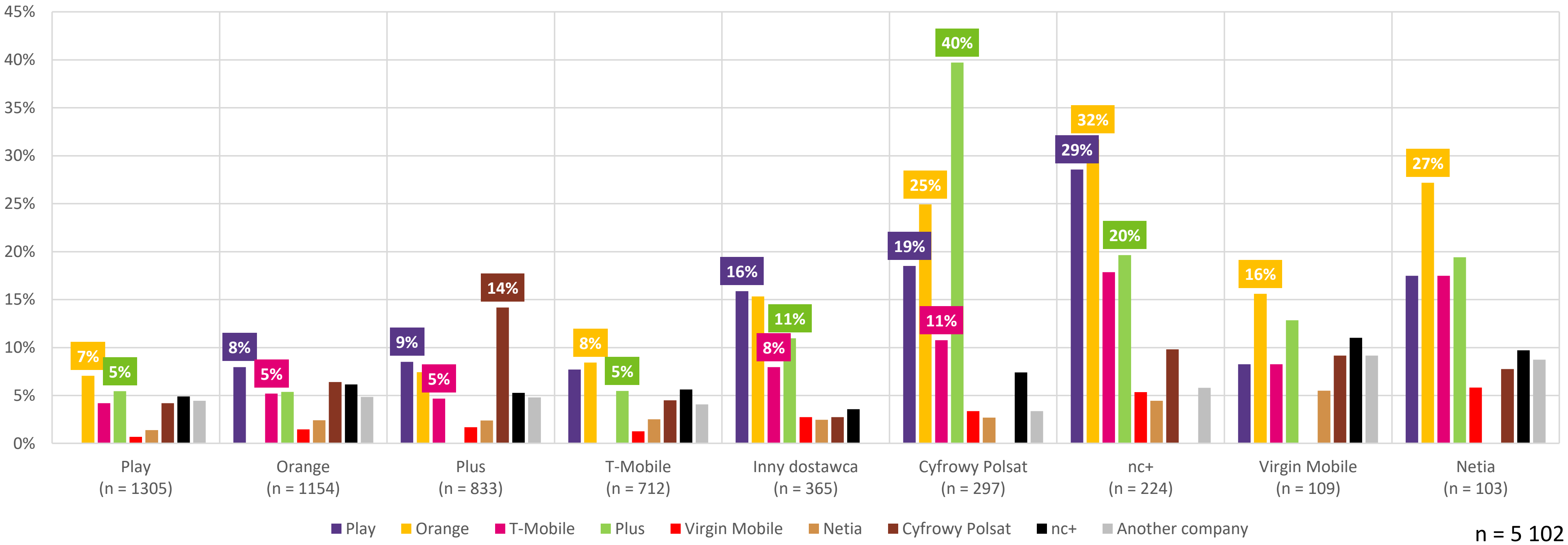
Analysis by age



Young people prefer **Play** services the most, while **Orange** is the leader among people over 34 years of age. The market share of **T-Mobile** network is growing with age.

Which provider do you use?

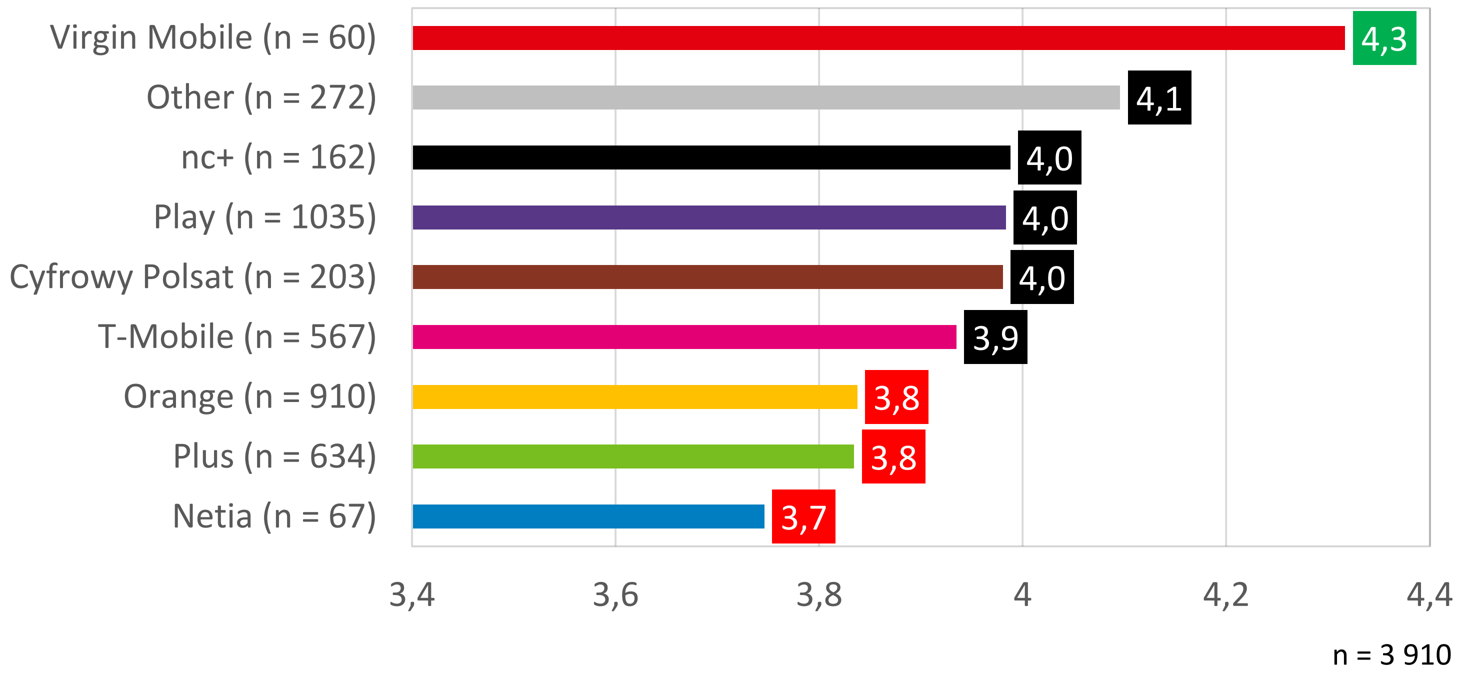
Correlations between suppliers



The above analysis shows which services other providers use depending on the primary supplier. There is a clear relationship between **Cyfrowy Polsat** and **Plus** customers: almost 40% of **Cyfrowy Polsat** customers use the **Plus** services. Looking at the relationships between networks belonging to the Big Four, it can be seen that about 5-8% of clients of each of these networks use the services of the other largest service providers.

Having regard to your recent purchases, to what extent have you reached your shopping goal?

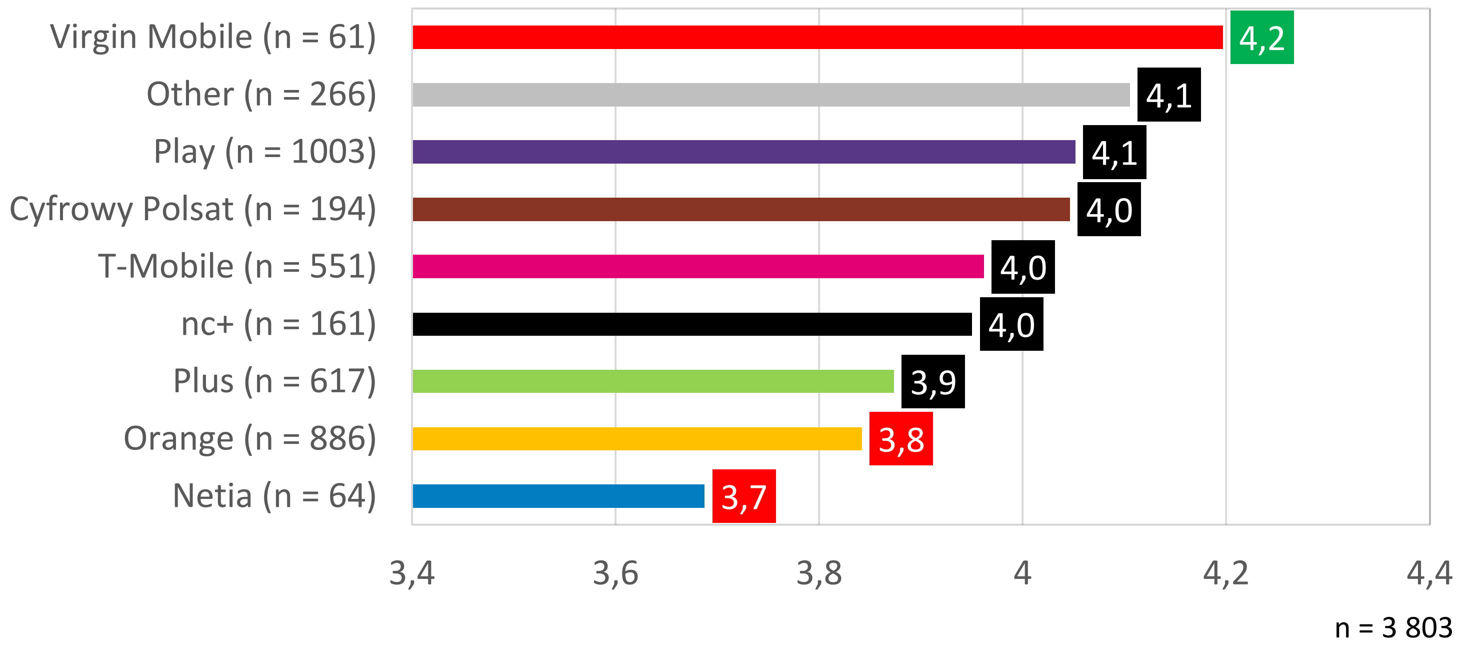
Rating on a scale of 1 to 5



The quality leader in the context of achieving the assumed shopping goals is **Virgin Mobile** with an average result of 4.3. However, the sample for this assessment is quite low, which results from the low market share of this service provider. Taking into account the four largest operators, the leader is **Play** with an average of 4.0. The lowest result was achieved by **Netia** - 3.7.

Rate the ease of purchase

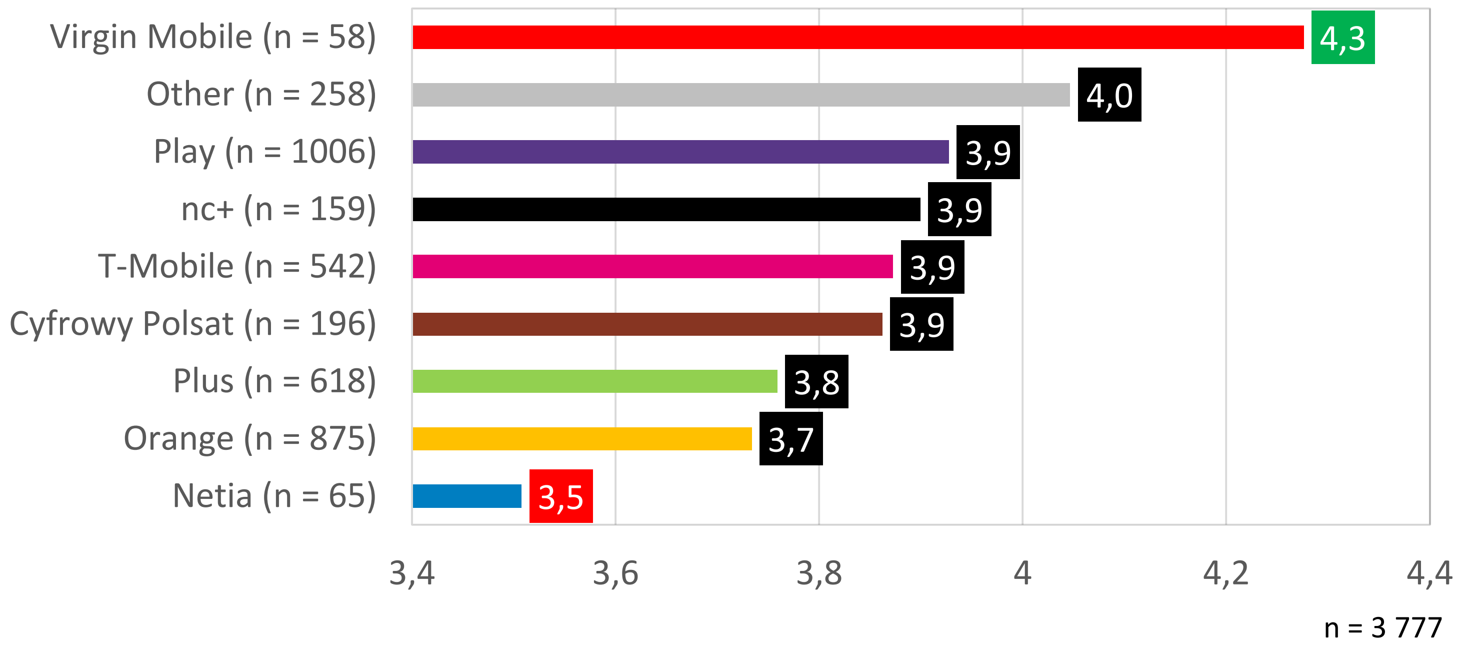
Rating on a scale of 1 to 5



The ease of purchase is also assessed best by customers of the **Virgin Mobile** network, where the average is 4.2. The leader of the Big Four is the long-term **YourCX** client, the **Play** network, with an average of 4.1. The lowest result is achieved by **Orange** with a result of 3.8 and **Netia**: 3.7.

Evaluate your satisfaction with the purchase

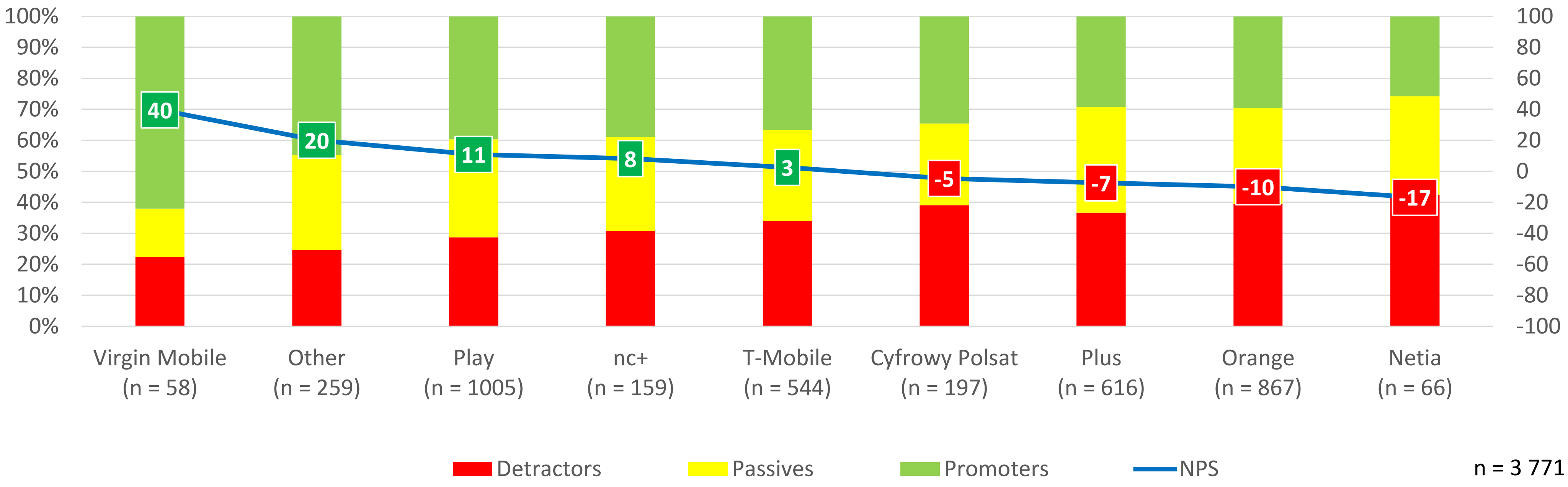
Rating on a scale of 1 to 5



The distribution of the overall satisfaction with the purchase is fairly even. As many as 4 service providers have achieved an average score of 3.9, but taking into account the 100th place after the decimal point, the leader among them is **Play**. Once again, the **Orange** network is rated the lowest, with a result of 3.7 and **Netia**: 3.5.

How likely is it that you will recommend the services of these companies to your friends?

Indicator Net Promoter Score (NPS)



The NPS indicator is a universal methodology for measuring the quality of experience based on the question about the willingness to recommend services of a specific company. The **Omnichannel** research leader is **Virgin Mobile** with a NPS score of 40, slightly over 60% of subscribers of this network will be happy to recommend its services to friends (Promoters). The leader of the Big Four is the **Play** network, with a score of 11. Over 40% of **Netia** customers will not recommend the company's services (Detractors).

How likely is it that you will recommend the services of these companies 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).

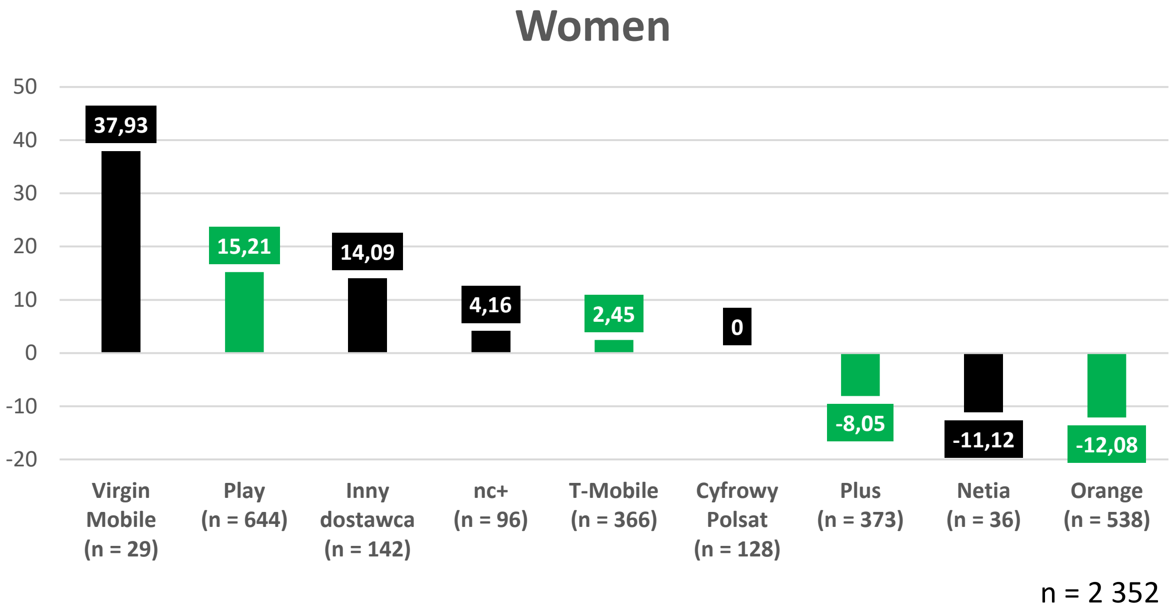
Larger research projects are based on crossing large amounts of data and segmentation of behaviors into groups of Promotors, Passive and Detractors. YourCX performs such analyzes, for example in relation to experiences in cinema networks, the usefulness of e-commerce platforms or the availability of 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.

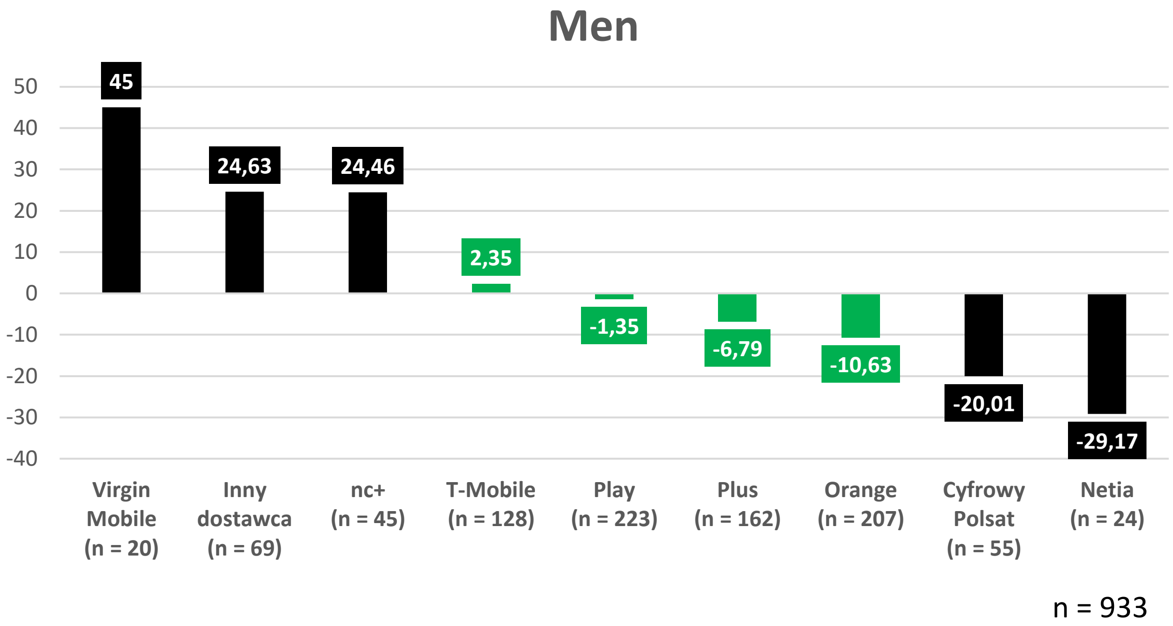
Jakub Kołaciński

Project Manager in YourCX

How likely is it that you will recommend the services of these companies to your friends?

NPS by gender

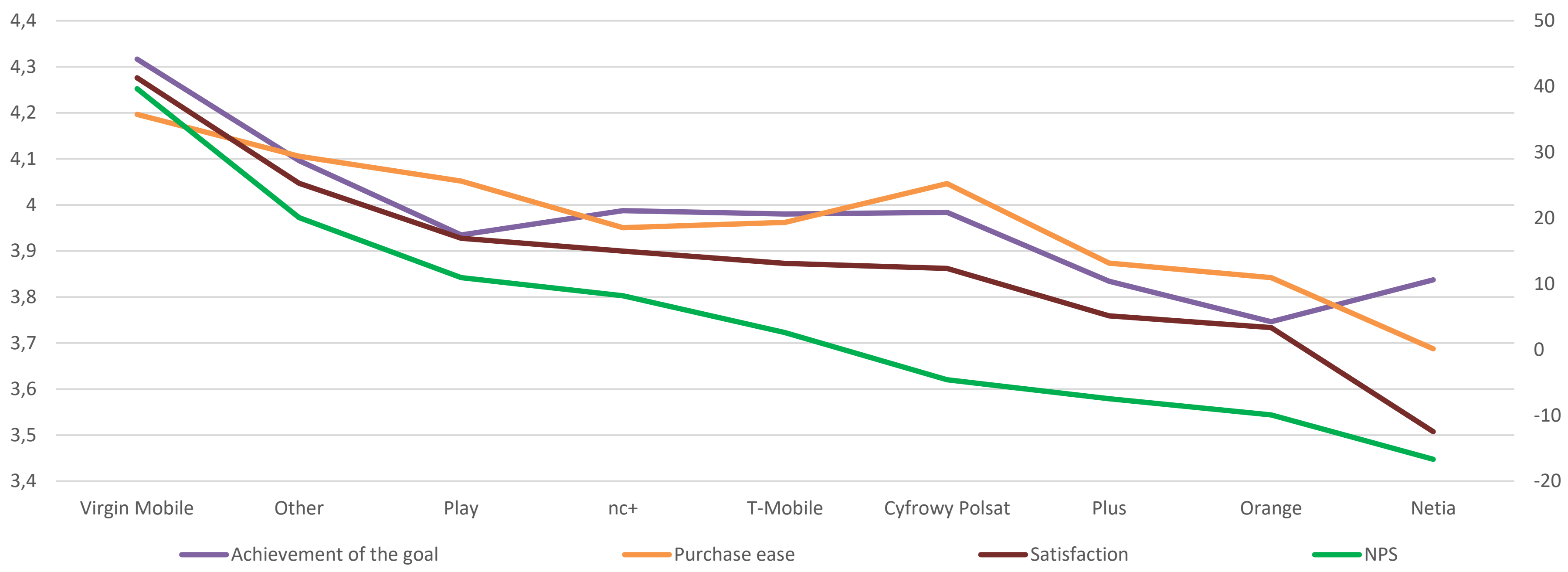




Analysis of the NPS ratio by gender of the respondents clearly shows that the tendency to recommend a service provider by women (score from 38 to -12) is much more moderate than that of men (result from 45 to -29). These differences are also clear in the context of the evaluation of the largest telecommunications networks. Interestingly, **T-Mobile** is rated very similarly by women and men, while **Play** is rated much better by women.

Correlation analysis

The dependence of the willingness to command on satisfaction, the degree of reaching the goal and ease of purchase



Correlations with NPS:

Achievement of the goal = **0.72**

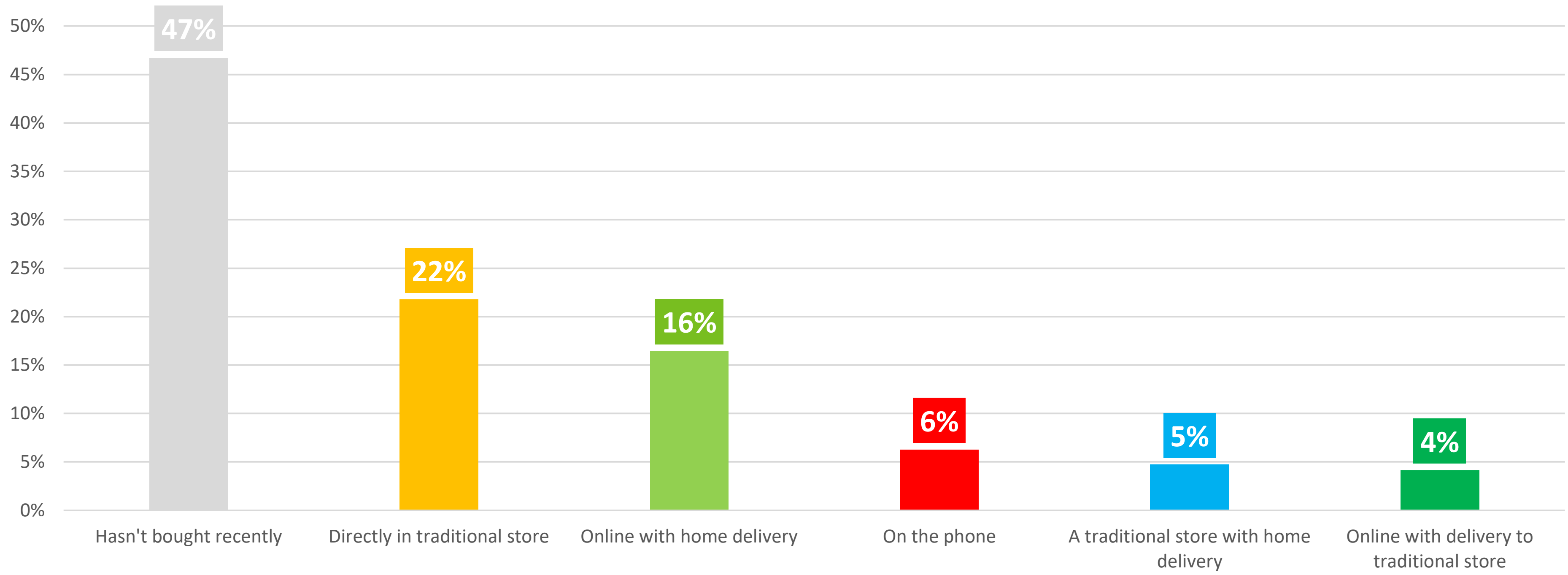
Purchase ease = **0.65**

Satisfaction = **0.81**

Very strong correlations are visible indicating direct dependence of the willingness to recommend on satisfaction, the degree of reaching the goal and ease of purchase. This means that customers of telecommunications companies are willing to recommend brands to their friends when they are satisfied with the purchase process and the quality of services. Recomendation has a large impact on further sales, even few percentage points when changing the NPS by 5.

Have you recently bought a telecommunications service, internet access or digital TV?

The question of a single choice

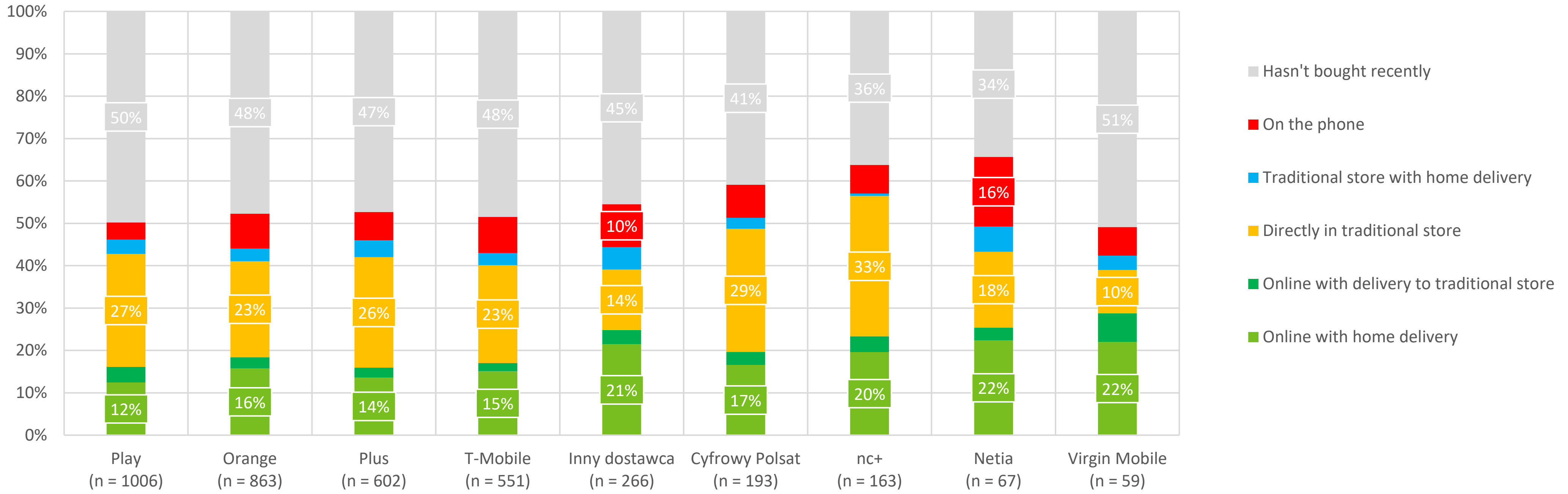


n = 3 379

On average, every second respondent has recently purchased a telecommunications service. The most popular way of purchase is direct purchase at a traditional store, which was chosen by 22% of all respondents. In the second place: online purchase with delivery (16%). The least popular method is online purchase with collection in the traditional store.

Have you recently bought a telecommunications service, internet access or digital TV?

Distribution of responses by supplier



n = 3 770

Share of indications of the sales channels broken down by the company whose services the respondent uses. The broader than average distribution of indications for the purchase on the phone among **Netia** customers (over 16%) results from the sales policy based precisely on this channel of purchase. **The Big Four customer preferences are very similar.**

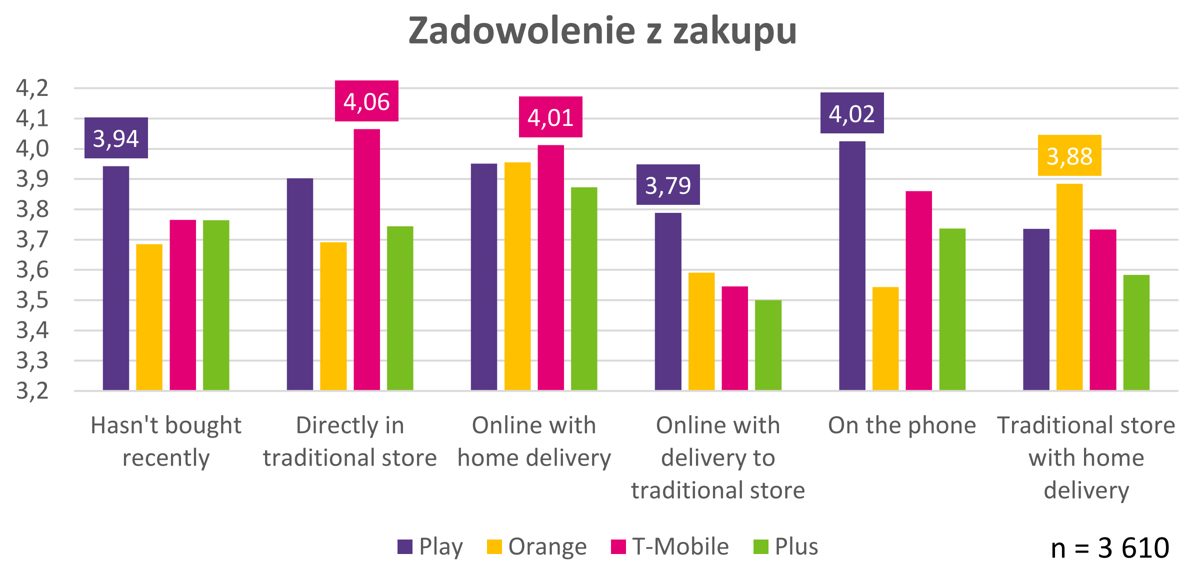
Assessment of the degree to which a purchase goal has been achieved and the ease of purchasing a given operator

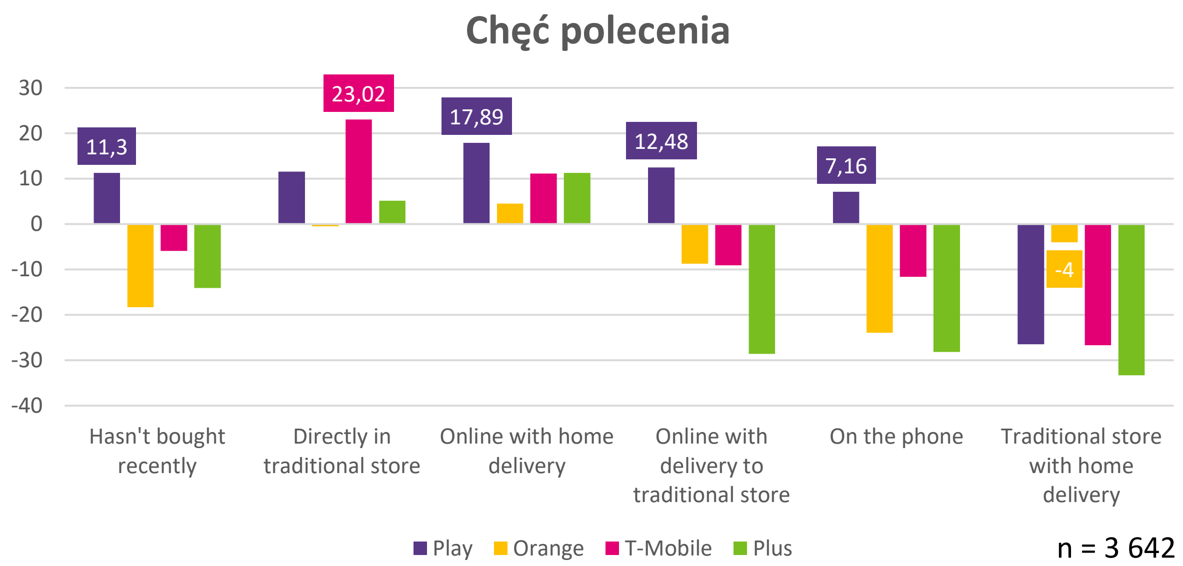
Analysis by the method of purchase

Play definitely dominates among people who recently did not purchase a telecommunications service, but remain clients of this network. It means that the positive impressions from the purchase have remained in their memory for a long time. The **T-Mobile** network dominates in many purchase categories, especially those related to direct purchase at a stationary and online point with collection at a stationary point.

Assessment of satisfaction with purchase and willingness to recommend a given operator

Analysis by the method of purchase

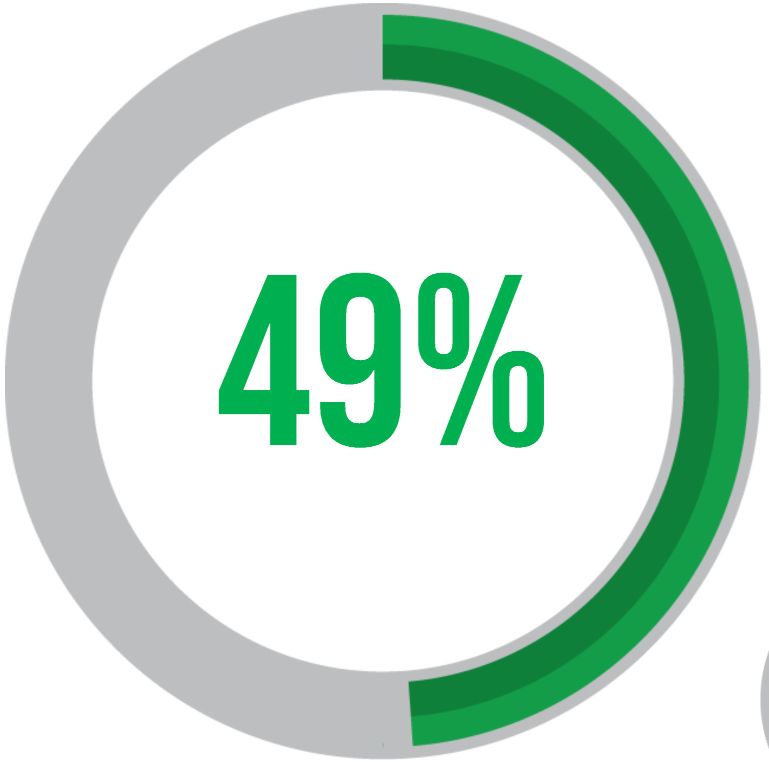




In these categories, **Play** also dominates among those who have not made a recent purchase. This network can also boast a positive NPS rating for all categories, in addition to the purchase at a stationary point with home delivery, where the highest score was achieved by **Orange** (NPS: -4). **T-Mobile** records the best ratings of satisfaction and willingness to recommend in the direct purchase channel at a traditional point.

Are you looking for information on the Internet before buying telecommunications services, access to the Internet or digital TV at a traditional store?

The question of a single choice



ALMOST ALWAYS

looks for information online before buying at a traditional store. We call this the ROPO effect.

OFTEN | SOMETIMES | RARELY | NEVER

Are you looking for information on the offer on your smartphone when shopping at a traditional store?

The question of a single choice

19%	15%	25%	21%	20%
Almost always	Often	Sometimes	Rather rarely	Never

What information do you seek?

People looking for information on a smartphone during a visit to a stationary store. A multiple choice question

83%
compares prices

52%
checks detailed information

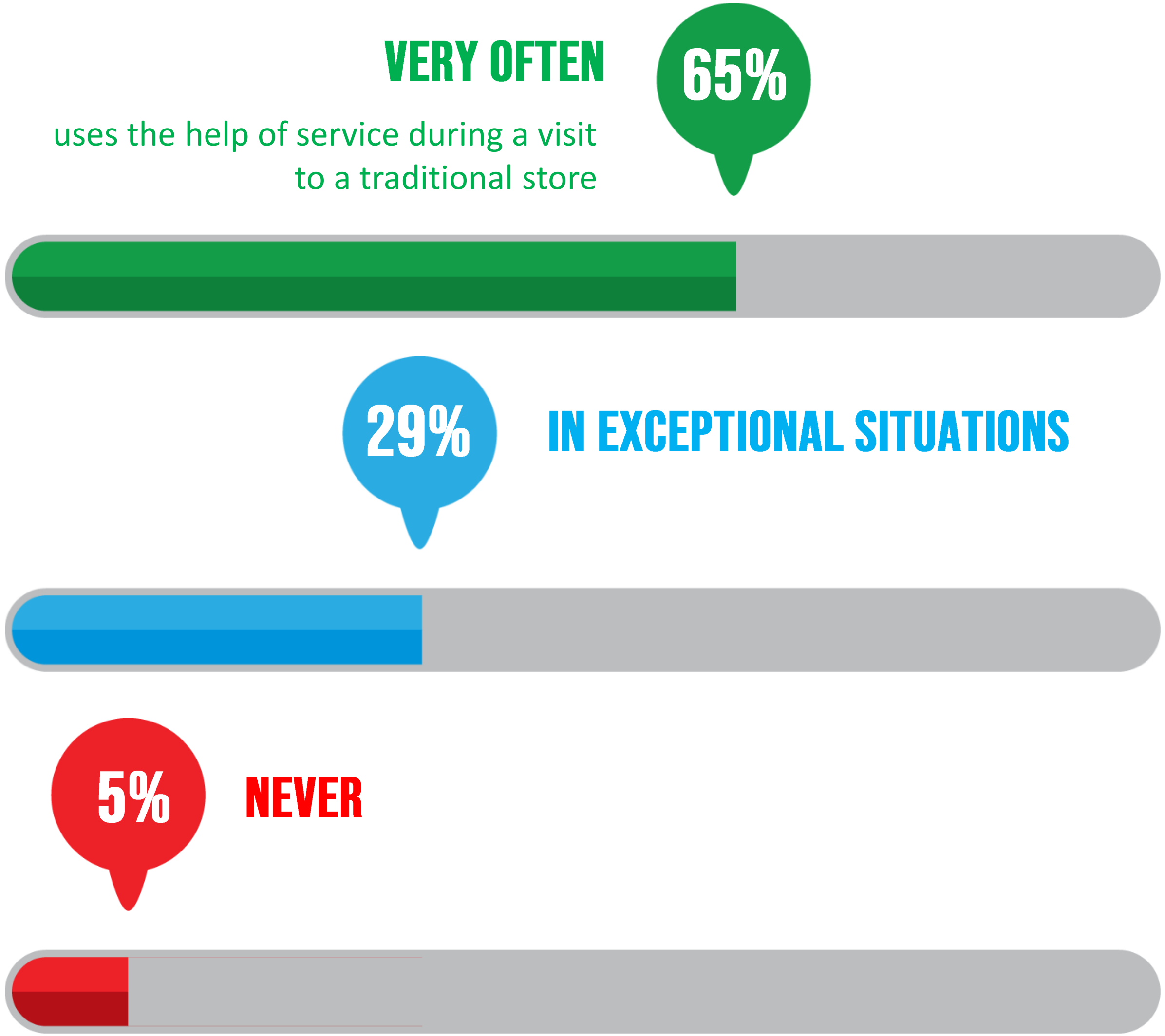
57%
looks for reviews

32%
looks for alternative options

n = 152

Do you use service support when shopping at a station?

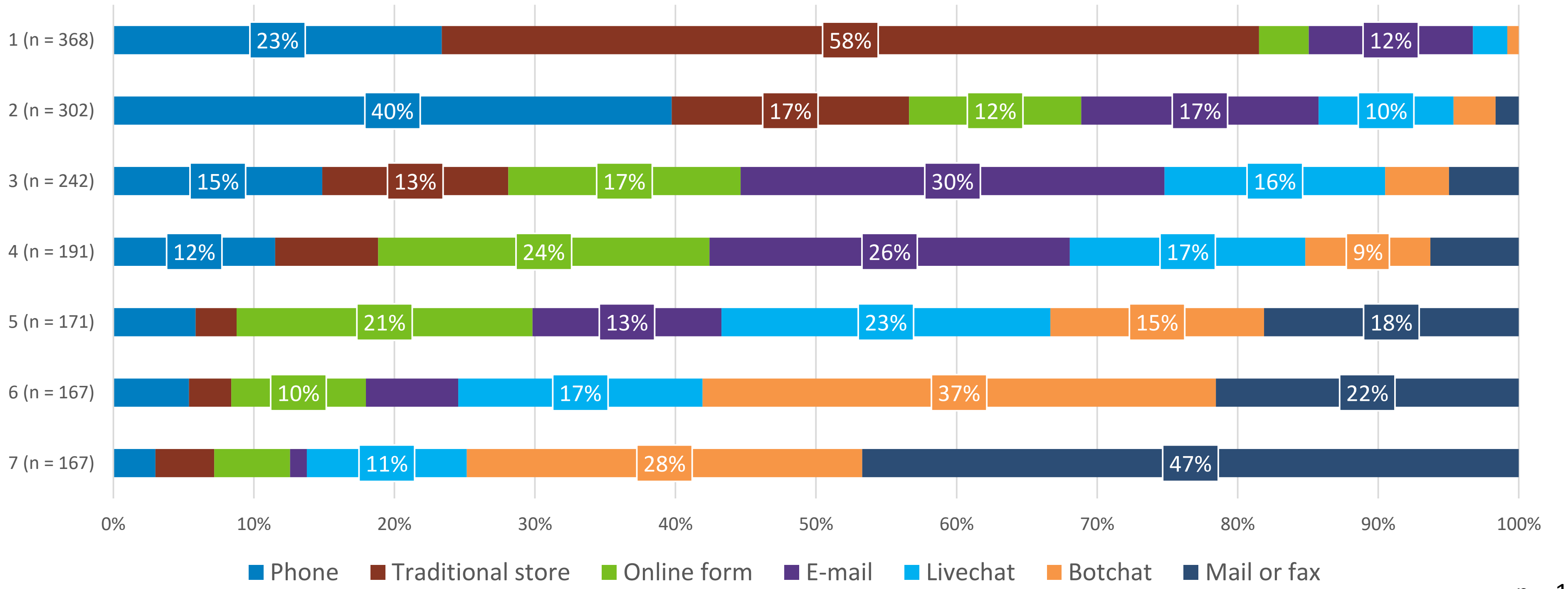
The question of a single choice



n = 437

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

Arrange from the way you prefer the most?

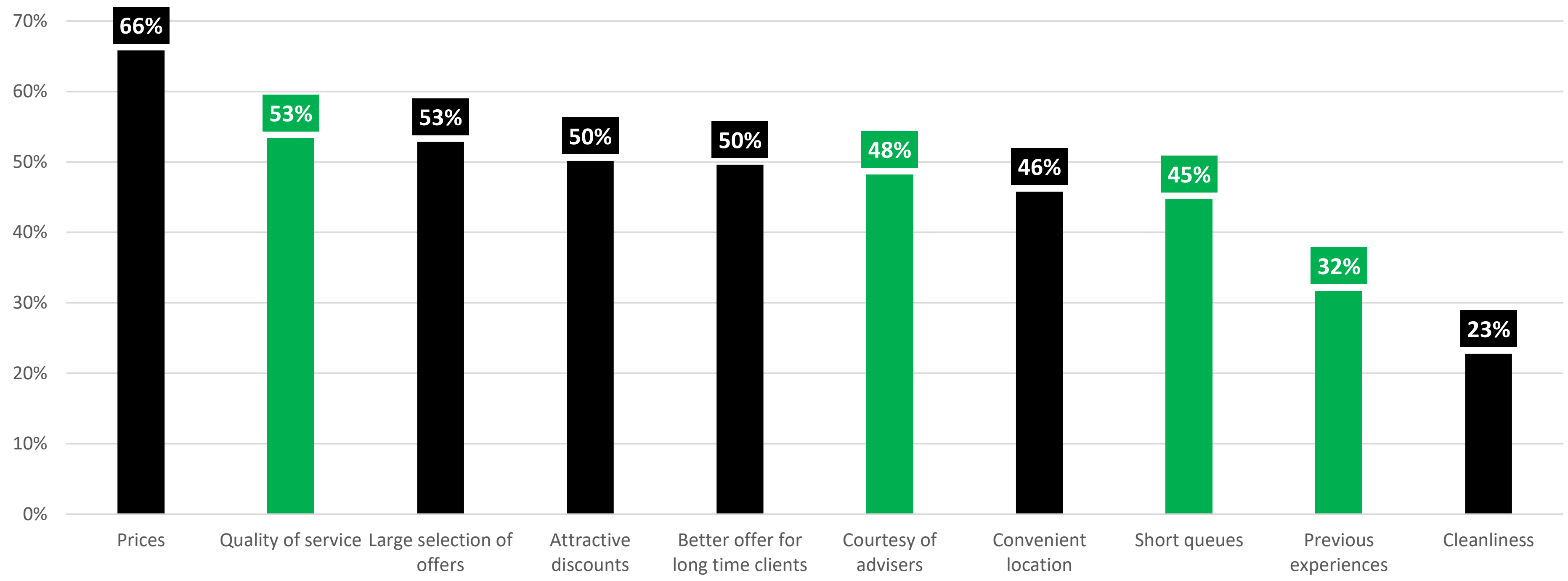


n = 1 614

Respondents arranged channels of contact with a traditional store starting with the one they prefer the most. The number one choice for 58% of respondents is **contact at a traditional store**, 23% prefers the **phone**, and less than 12% will select an **e-mail**. The group of channels of the second choice is dominated by **telephone contact** (40%). The **online form** in the second position is selected by 12% of respondents. Botchat and classic forms are the least popular.

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

A multiple choice question



n = 369

The prices are important for almost 66% of respondents. The quality of service, which was indicated by 54% of respondents, is in second place. Previous experience with the brand is chosen by less than every third respondent. These are the clients who approach the company with prejudices, for them the whole relationship is important. With the **green color** we have marked the factors resulting from the Customer Experience strategy.

If there was such a possibility, would you rate a visit to a traditional store by means of questionnaires, rating screens or face buttons?

The question of a single choice

50%
having time and inclination

33%
very often, regardless of the situation

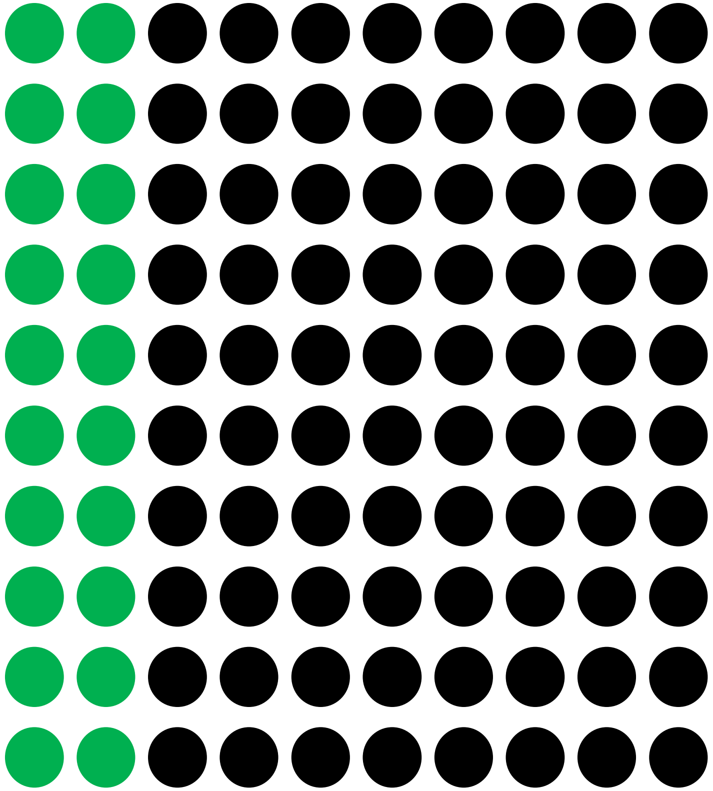
10%
would not

7%
only when dissatisfied

n = 353

Before you buy telecommunications services, access to the Internet or digital TV over the Internet, do you visit the traditional store to get acquainted with the product/offer?

Single choice question



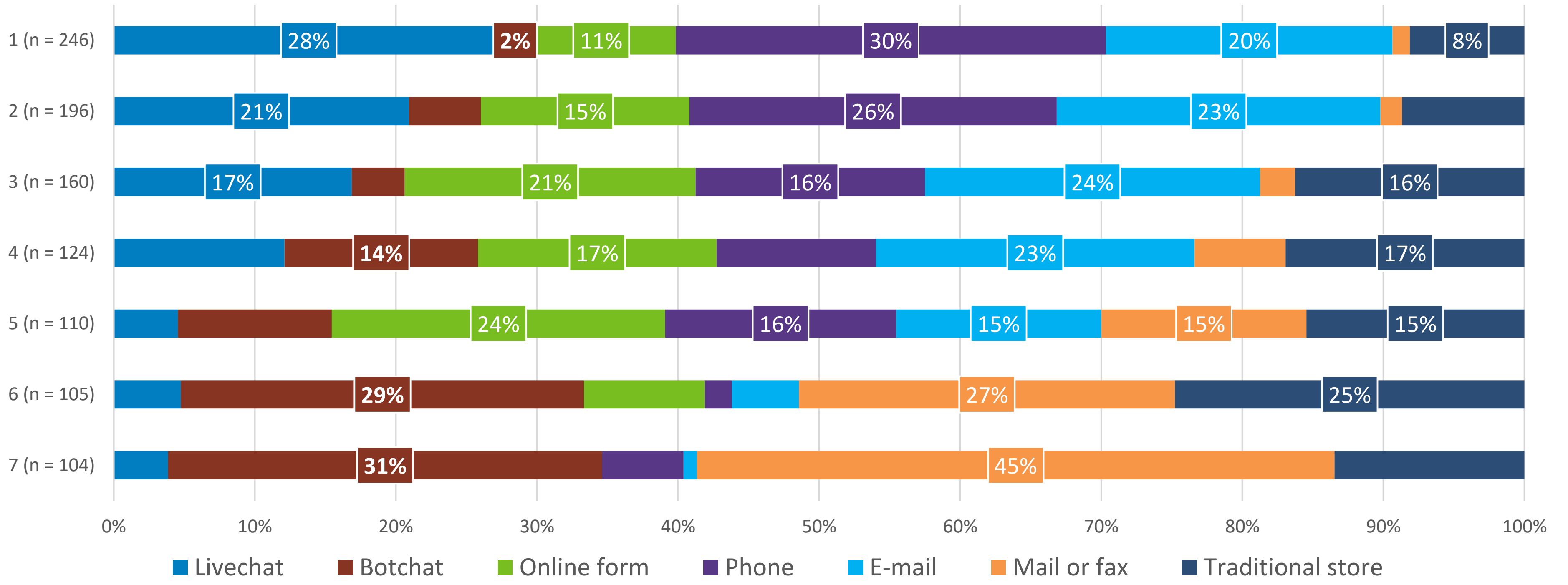
20%

of the respondents will almost always visit the traditional store before buying online. 11% do so often, 23% sometimes, 21% rather rare and 25% not at all.

n = 280

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

Arrange from the way you prefer the most

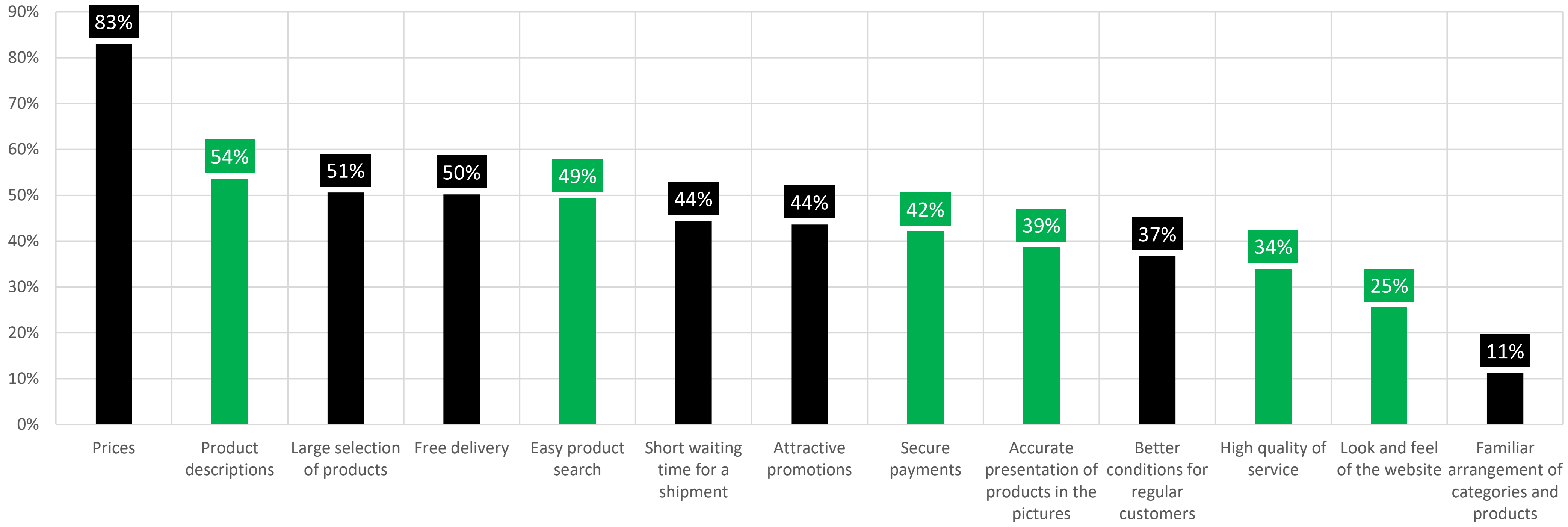


n = 1 045

The respondents were scheduling the contact channels with the internet point starting with the one they prefer the most. The number one choice for 30% of respondents is the **phone**, 28% prefers **livechat**, and 20% contact via **e-mail**. In the group of channels of the second choice, there is a slight increase in the share of **e-mail** and **online form**. Botchat and classic forms are significant only from 4th place.

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

A multiple choice question



n = 259

In the online store the most important factor is the price, which will be compared by 83% of the respondents. For more than a half of the respondents, a detailed description of the product is important, a simple thing to research and optimize. Familiar arrangement of categories and products is not important for the majority of respondents, which means client expects changes for the better, even if they are to come at the expense of habits. With the **green color** we have marked the factors connected with the Customer Experience strategy.

If it was possible, would you rate your satisfaction with the online store using surveys?

The question of a single choice

63%
having time and inclination

22%
very often, regardless of the situation

9%
would not

6%
only when dissatisfied

n = 248

Omnichannel 2018

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We invite you to contact us and cooperate!

Piotr Wojnarowicz

p.wojnarowicz@yourcx.io

+48 661 627 620

yourcx.io

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