Omnichannel 2018

House and garden

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

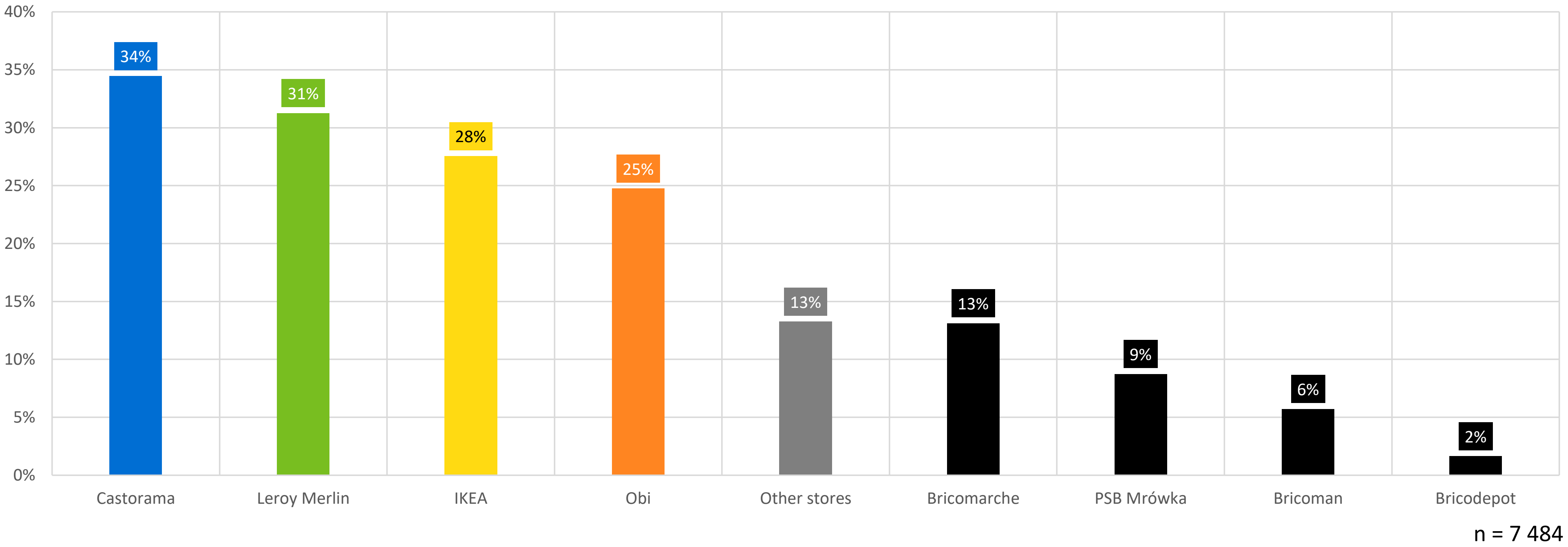
YourCX

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.

Where do you most often buy articles for the garden, home, do-it-yourself?

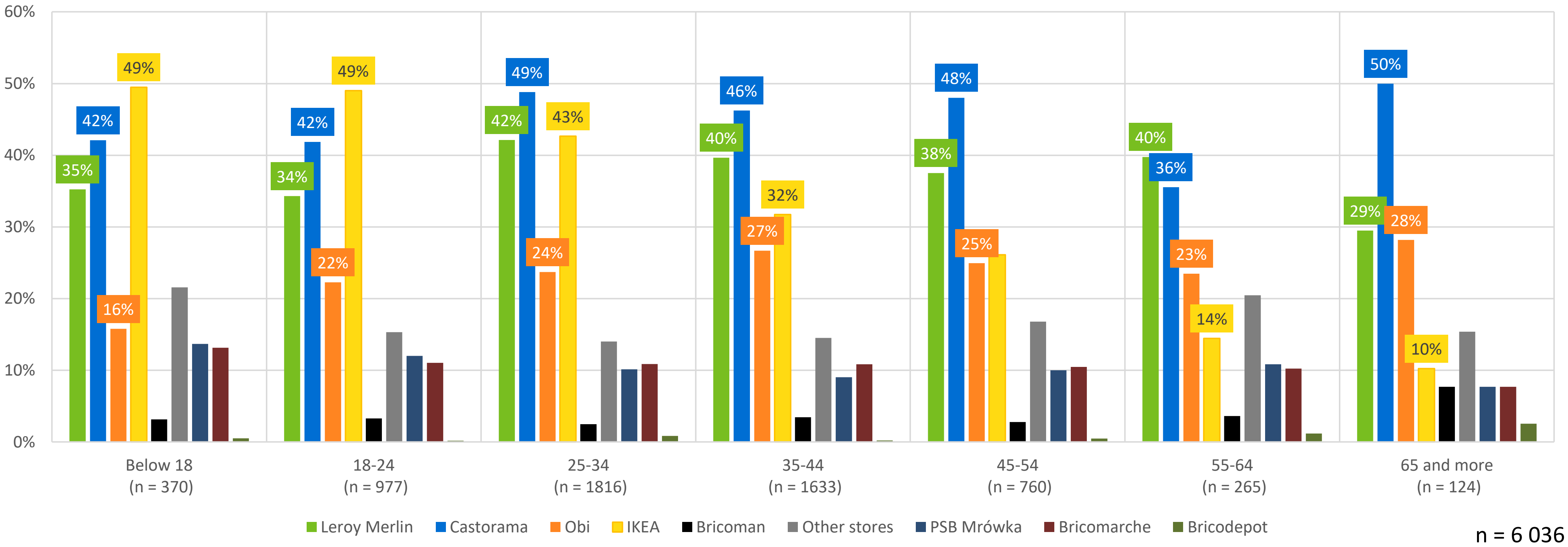
Multiple-choice question



The leader on the Polish market is Castorama, where 34% of respondents usually buy. The second place is occupied by the Leroy Merlin chain (31%). 28% go to IKEA stores and 25% to Obi stores. Other stores we asked about received a much smaller share of indications, 13% also declared shopping in other stores, outside the list.

Where do you most often buy articles for the garden, home, do-it-yourself?

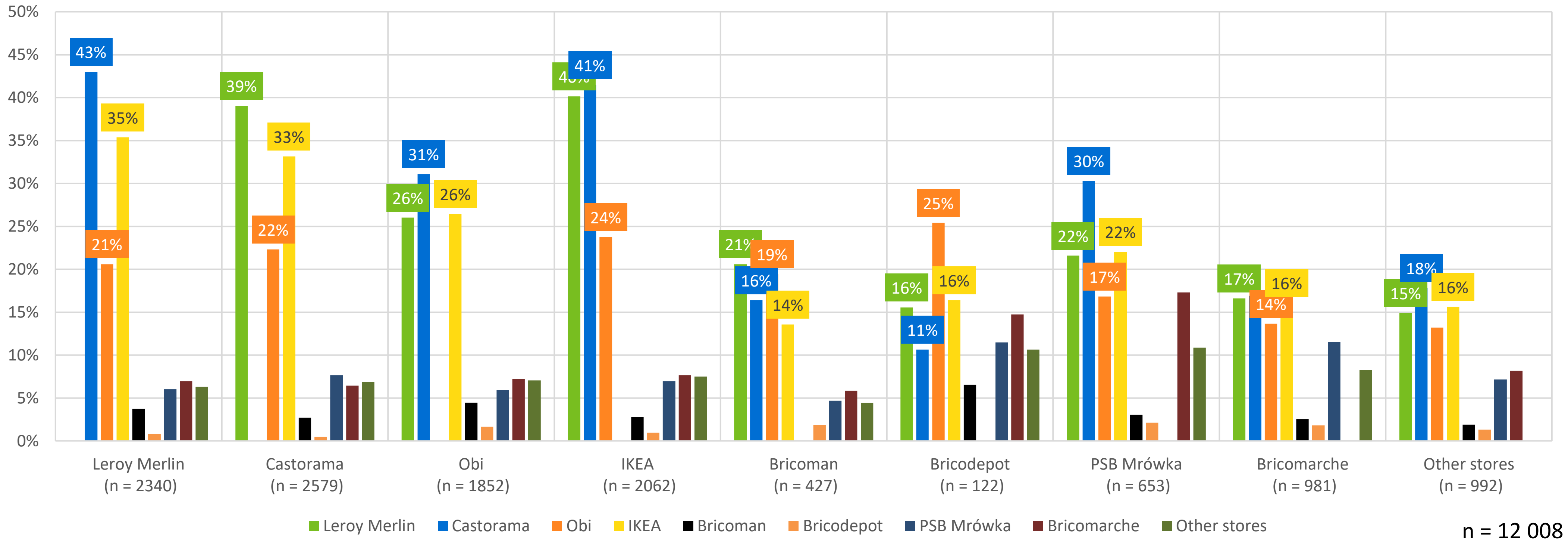
Analysis by age



Analyzing the shops chosen by consumers in the context of their declared age, we observe a clear dependence on IKEA purchases, which are preferred mainly by young people. As many as half of the respondents up to 24 years old declare shopping there. Castorama, on the other hand, is most popular in the 25-54 range and among the oldest. Leroy Merlin is a leader among people aged 55-64.

Where do you most often buy articles for the garden, home, do-it-yourself?

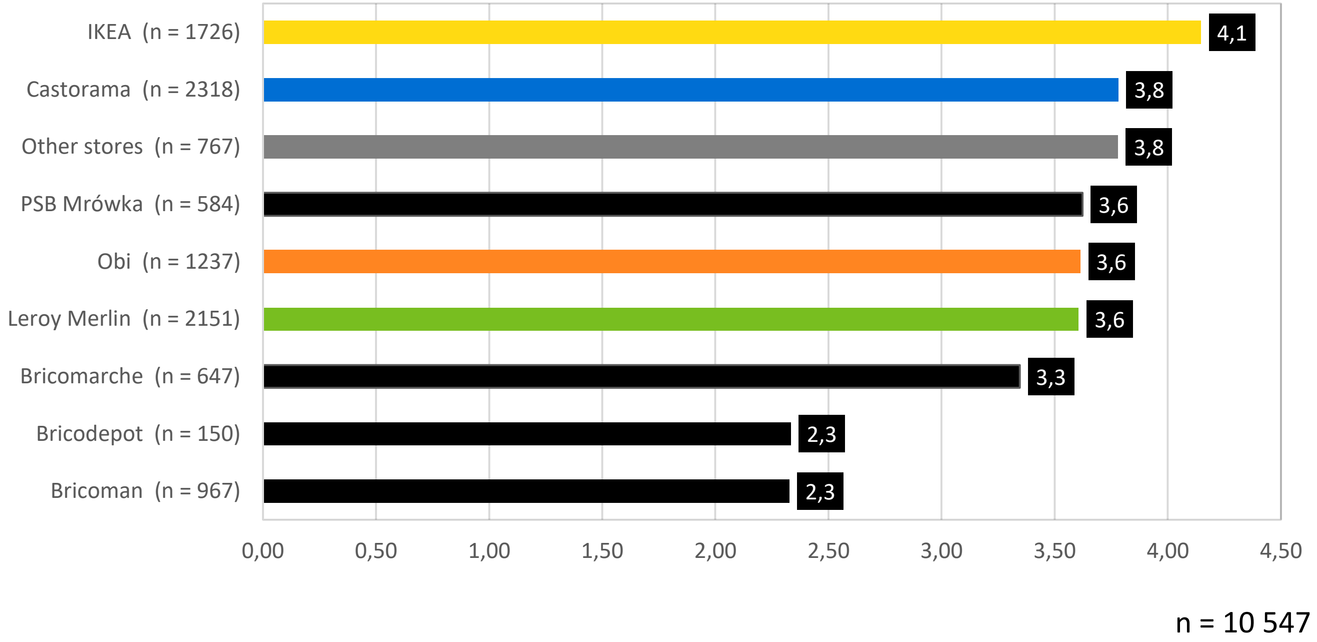
Correlations between suppliers



The above analysis shows in which other shops the customers of individual chains still buy. Among the customers of the Castorama chain, the leader on the Polish market, 39% of the respondents also buy from Leroy Merlin and 33% from IKEA. Customers of the Obi chain are also dispersed in an interesting way, where the shares of the other three most popular shops are very similar.

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

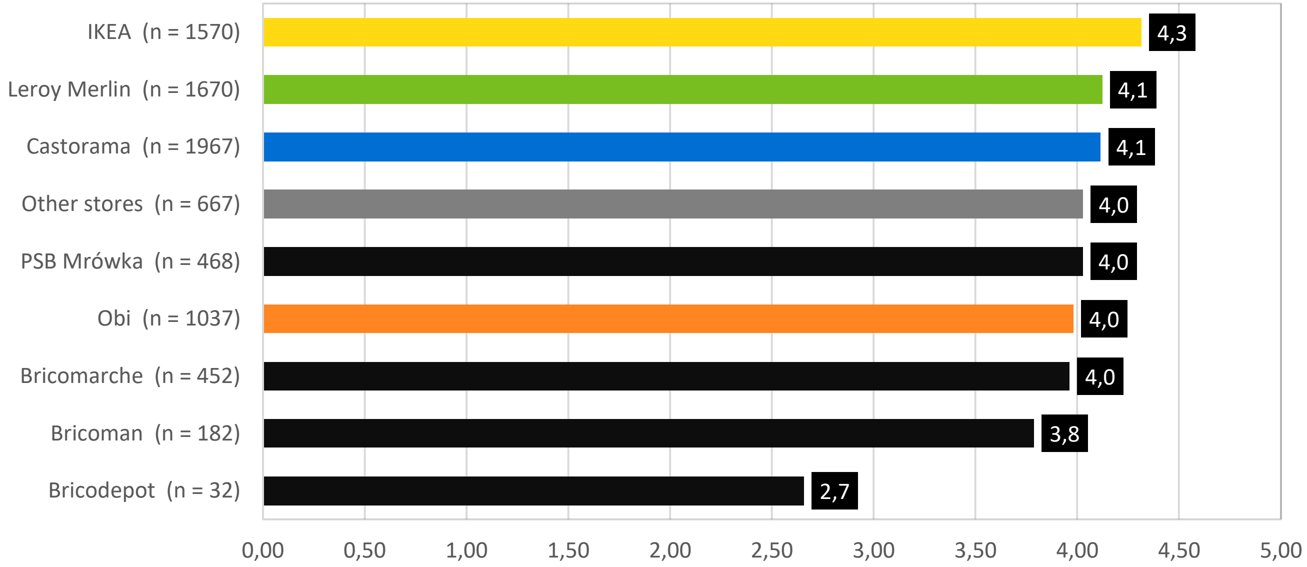
Evaluation on a scale from 1 to 5



The quality leader in terms of achieving the shopping targets is IKEA with an average score of 4.1. This chain has a significant advantage over Castorama, which got the average score of 3.8. Obi and Leroy Merlin have the same score as PBS Mrówka: 3.6. Bricodepot and Bricoman with an average score of 2.3 are the lowest rated.

Evaluate the ease of purchase

Evaluation on a scale from 1 to 5

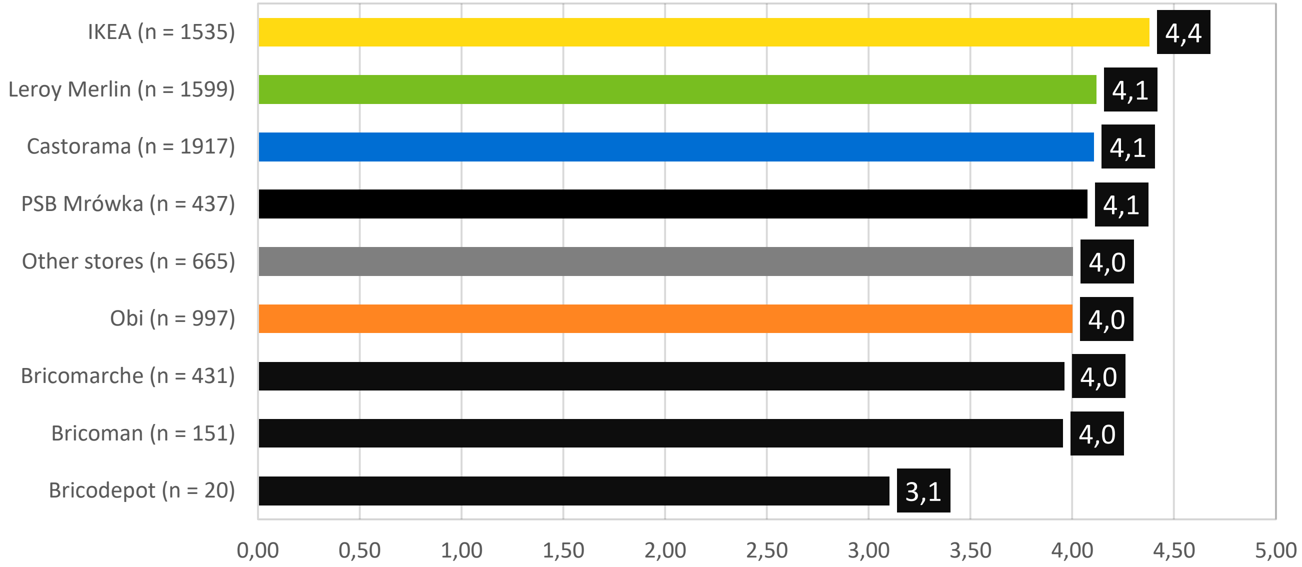


n = 8 045

Average ratings for ease of purchase are quite high for this industry, and in most companies they are over 4. The leader is IKEA with a score of 4.3, followed by Leroy Merlin and Castorama with an average of 4.1. The lowest score is among Bricodepot customers, who rate ease of purchase at 2.7.

Rate satisfaction with your purchase

Evaluation on a scale from 1 to 5

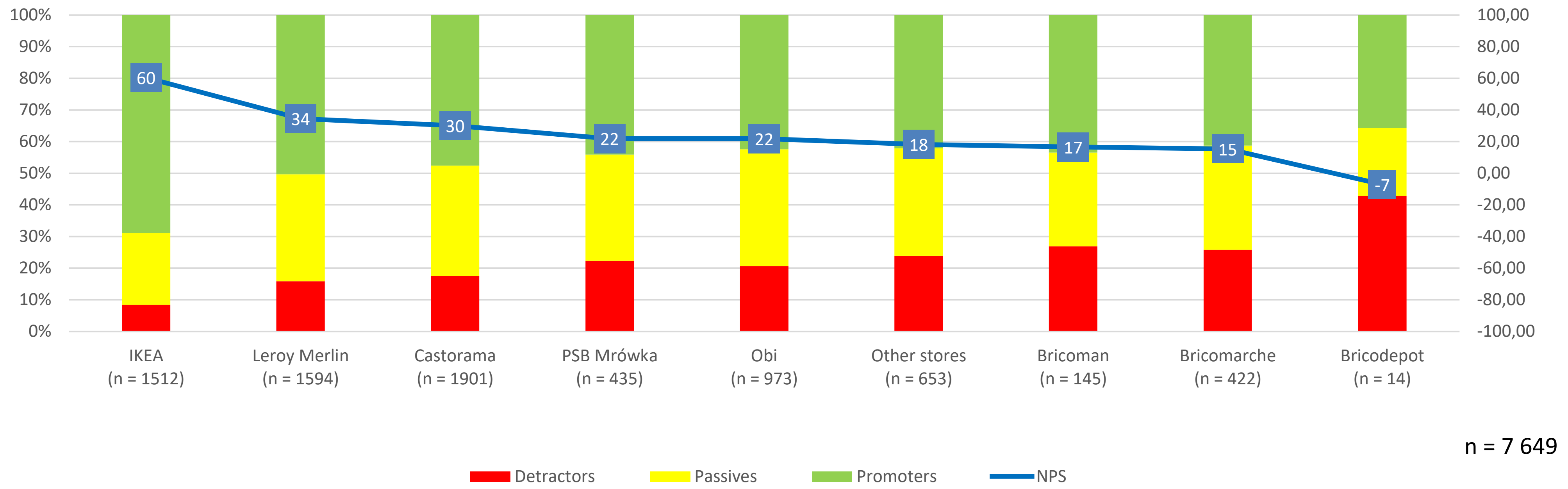


n = 7 752

IKEA is the undisputed leader with an average score of 4.4, but overall satisfaction with purchases among customers of other chains is fairly evenly distributed. Castorama and Leroy Merlin have an average score of 4.1. In this category, the lowest score is again for Bricodepot (3.1).

How likely is it that you will recommend these shops 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. An unquestionable leader is IKEA with the NPS index of 60, where almost 70% of customers will be happy to recommend the company to their friends. The difference between the leader and other companies is significant: in second place is Leroy Merlin with the NPS score 34 (50% are Promoters), followed by Castorama with the score of 30.

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.

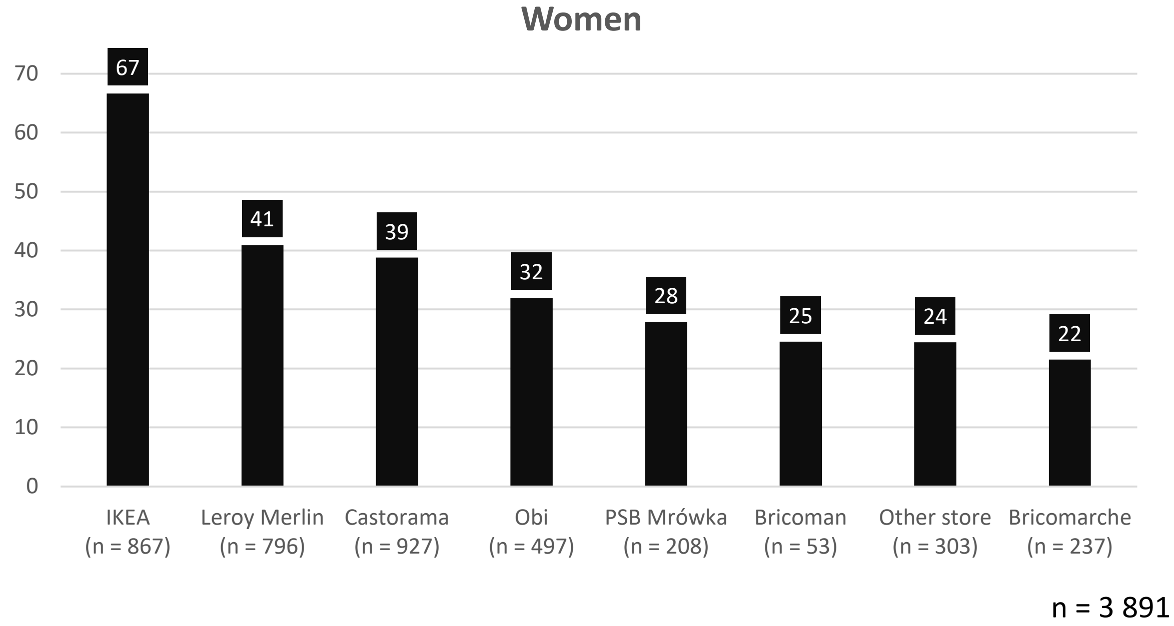
Jakub Kołaciński

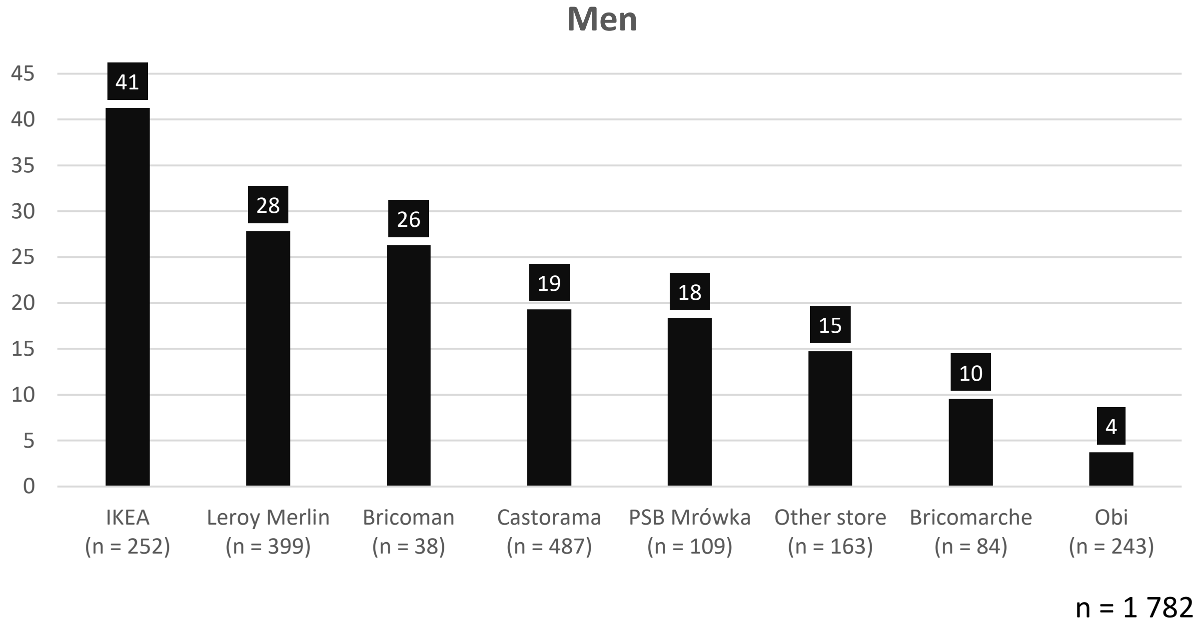
Project Manager

YourCX

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

NPS by gender

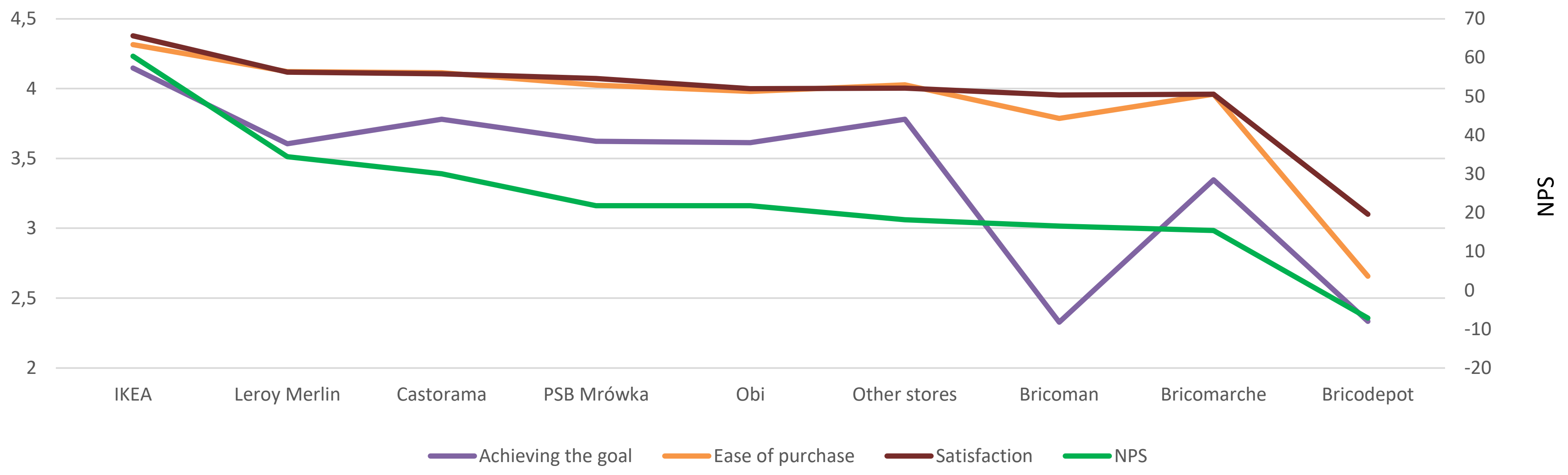




Analysis of the NPS indicator clearly shows that women are much more likely to recommend a store (the indicator varies from 67 for IKEA and 22 for Bricomarche) than men (score between 41 for IKEA and 4 for Obi).

Correlation analysis

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



Correlations with NPS:

Achieving the goal = 0.72

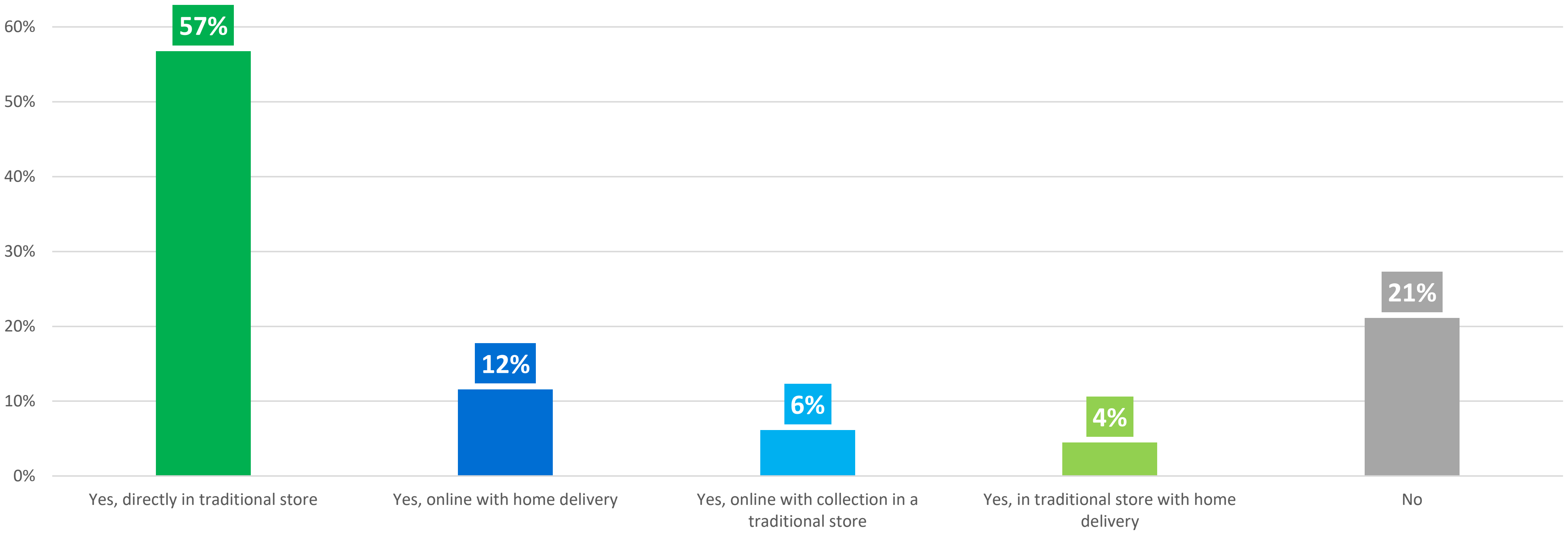
Ease of purchase = 0.65

Satisfaction = 0.81

These are very strong correlations indicating a direct dependence of the willingness to recommend on satisfaction, the degree of achievement of the goal and ease of purchase.

Have you recently bought items for your garden, house, do-it-yourself?

Single-choice question

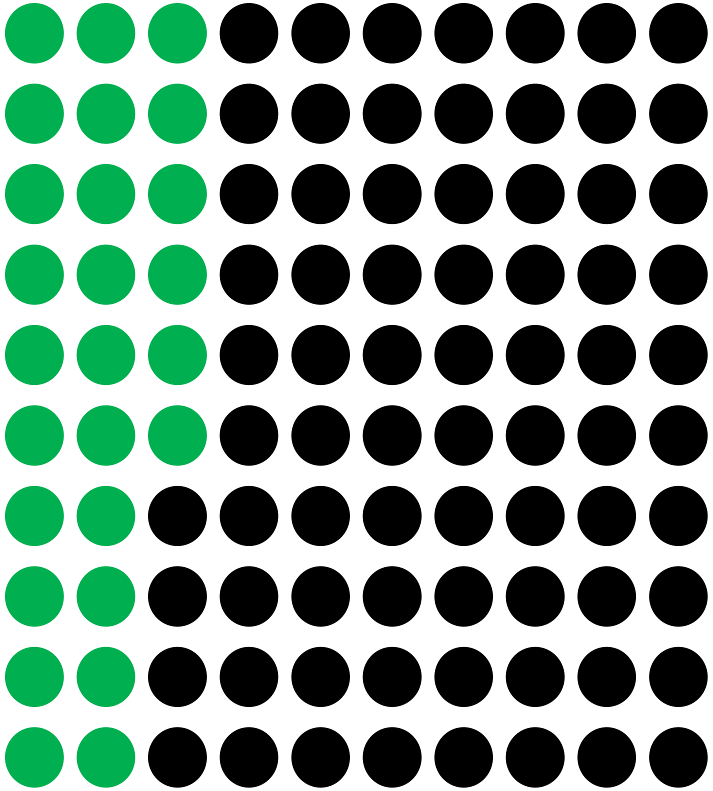


n = 5 061

Nearly 80% of survey participants have recently bought items for the garden, house and/or do-it-yourself activities. The vast majority, as much as 57%, have purchased directly from a traditional store. This is a very large share of the traditional channel orientation. 12% declare an online purchase with delivery, and only 6% an online purchase with collection in a traditional shop. 4% chose to buy in a traditional shop with home delivery (large-size products).

Are you looking for information on the Internet before buying garden, house and/or do-it-yourself items in a traditional store?

Single-choice question



36%

searches for information online before buying at a traditional point of sale. We call this the ROPO effect.

25% do it often, 26% sometimes, 8% rather rarely and 5% not at all.

Are you looking for information about the offer on your smartphone when shopping at a landline?

Single-choice question

13%	19%	27%	19%	22%
Always	Often	Sometimes	Rarely	Never

n = 1 335

What information are you looking for?

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

76%
compares prices

52%
checks detailed information

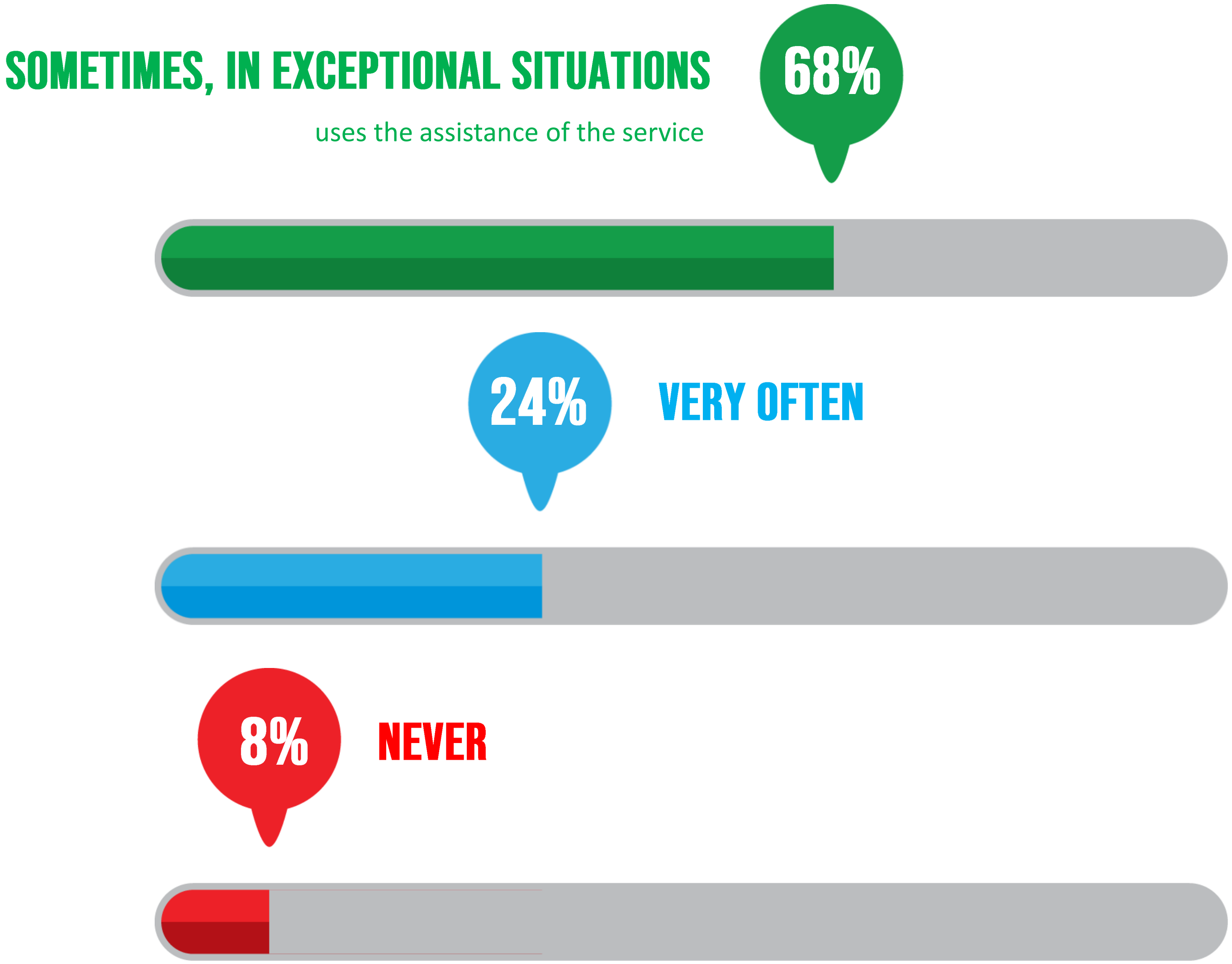
63%
looks for a review

30%
seeks alternative options

n = 415

Do you use the assistance of the service staff when shopping at a traditional store?

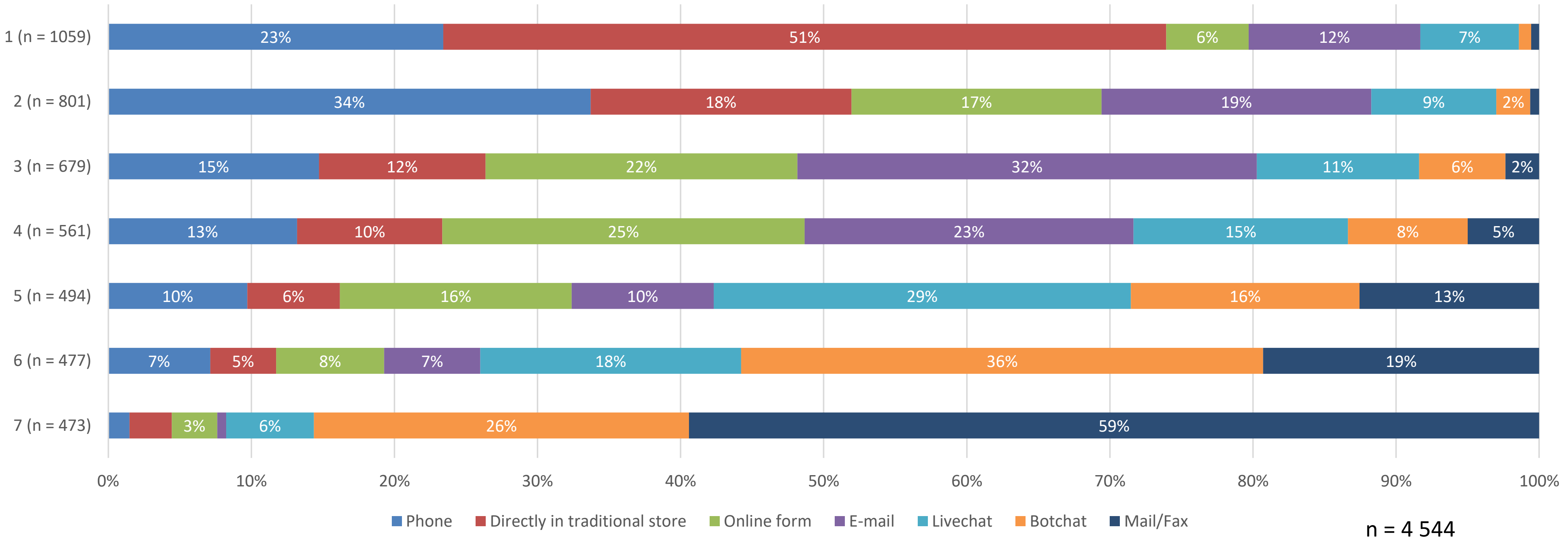
Single-choice question



n = 1 268

How would you like to contact a stationary shop if necessary?

Starting with the way you prefer the most



Respondents ranked the channels of contact with a stationary point, starting with the one they prefer the most. The number one choice for 51% of respondents is personal contact at a landline, 23% prefer the phone and less than 12% choose e-mail. The second choice channels are dominated by telephone contact - this form is chosen by almost 34%. The form in the online store is chosen by 17% of respondents in the second position. Botchat and written forms are the least popular.

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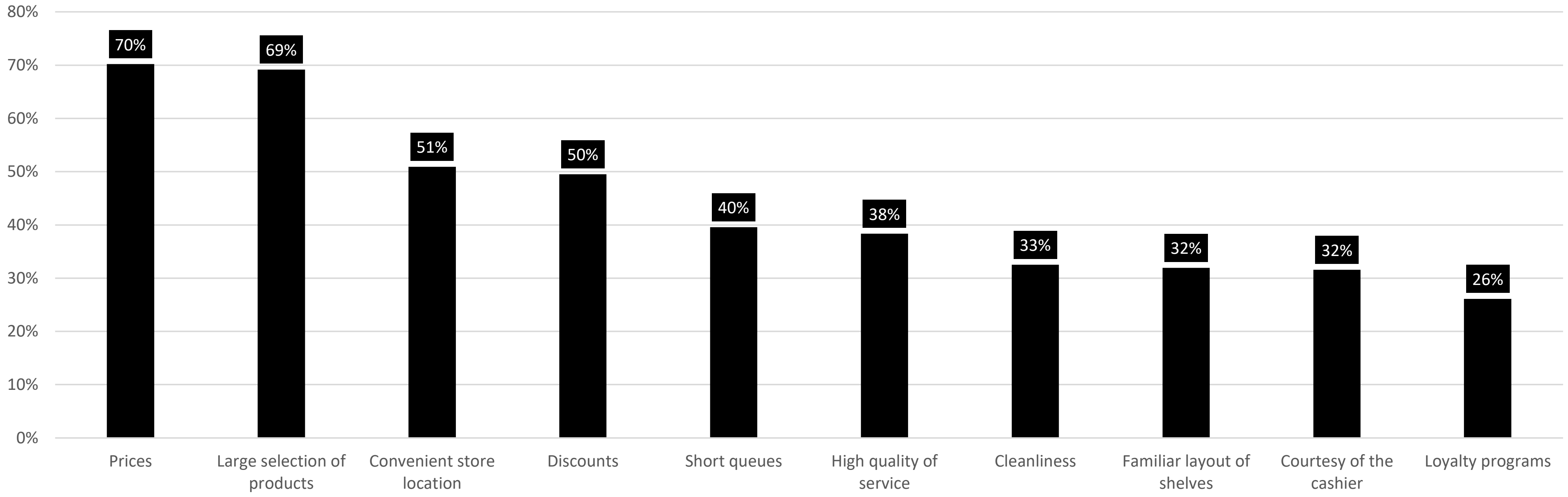
What is most important to you when shopping at a traditional store?

Multiple-choice question



n = 1 064

Prices are important for 70% of the respondents, but an equally important factor is the wide choice of products, which was indicated by almost the same number of consumers. Every second respondent also considers the location of the store and attractive promotions to be important. Short waiting time in line (40%), high quality of advisory services (38%) 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 stationary point by means of surveys, evaluation screens or buttons with smileys?

Single-choice question

53%
If they had time and desire to do so

29%
Very often, regardless of the situation

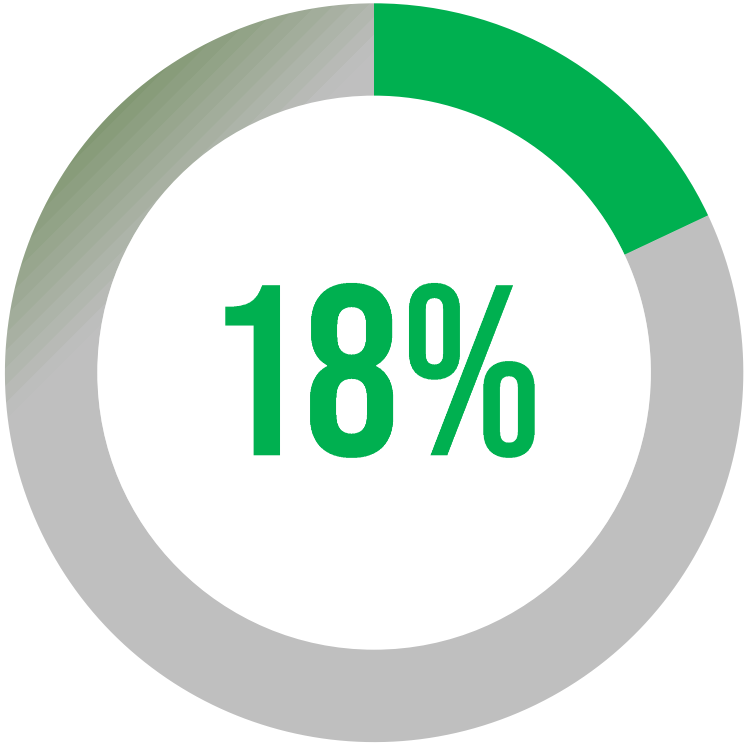
12%
They would not

6%
Will rate only in case of dissatisfaction

n = 992

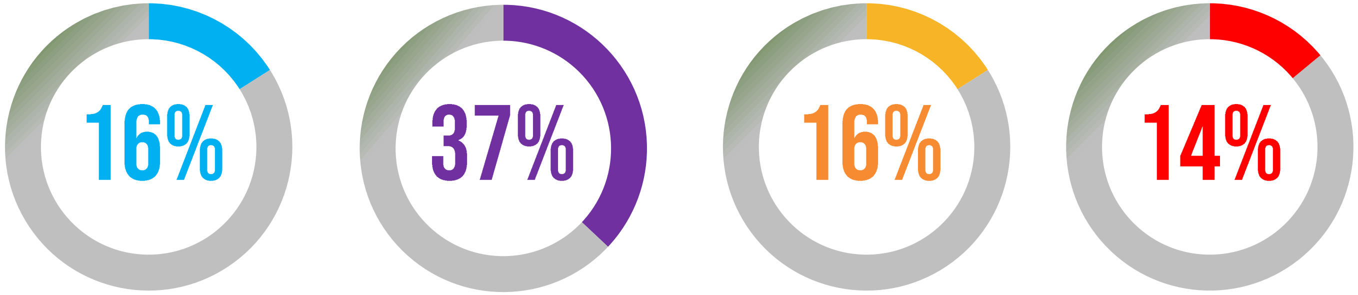
Do you visit traditional stores to get acquainted with the product before you buy items for your house and garden online?

Single-choice question



ALWAYS

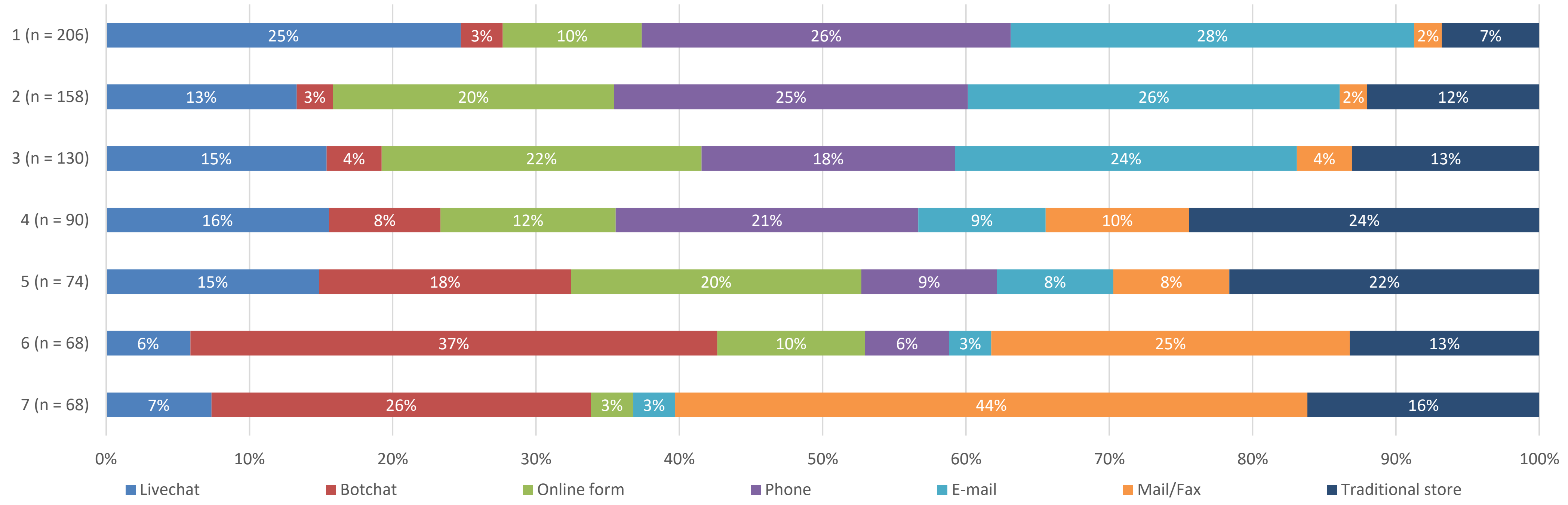
searches offline experiences before buying online.



OFTEN SOMETIMES RARELY NEVER

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

Starting with the way you prefer the most

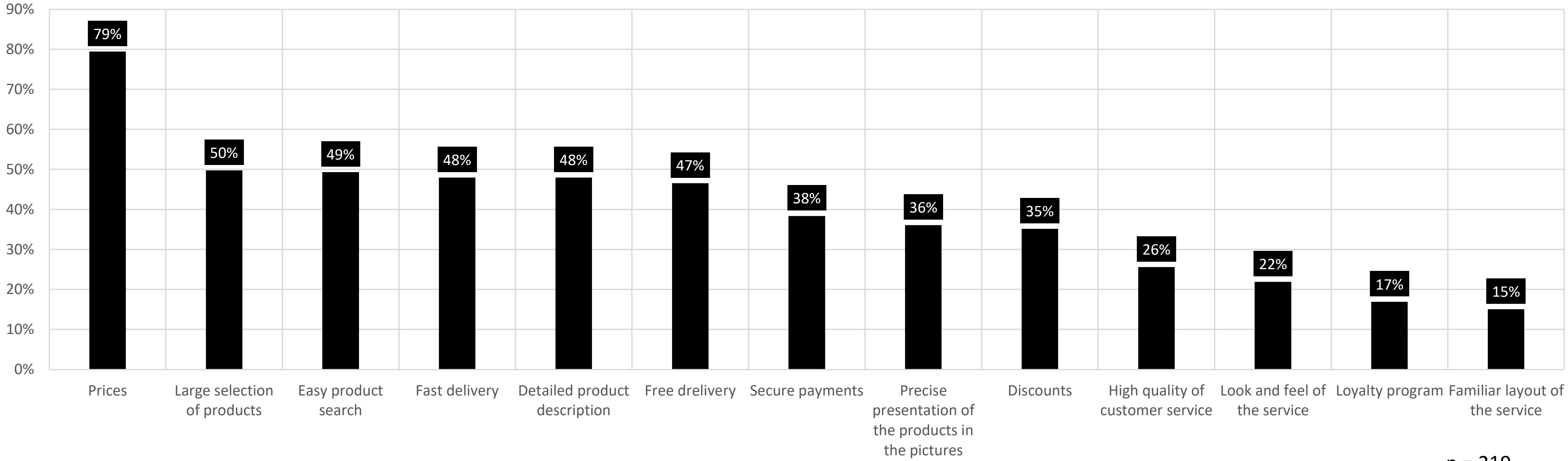


n = 1 045

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 emails, 26% prefer the phone, and every fourth respondent chooses contact via livechat. In the group of second choice channels, contact by phone, e-mail and online form is important.

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

Multiple-choice question



n = 219

The most important factor in the online store is the price, which will be compared by 79% of the respondents. Half of the respondents also indicate a wide range of products, easy search, short waiting time for delivery and detailed product descriptions. Free shipping is very important for 47% of respondents. Only 15% pay attention to the familiar layout of categories and products.

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

Single-choice question

56%
If they had the time and willingness to

29%
Very often, regardless of the situation

4%
Would not

11%
Will evaluate only in case of dissatisfaction

n = 248

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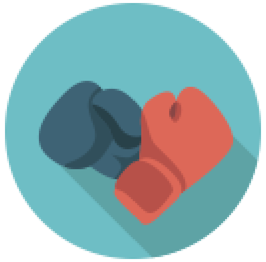

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We invite you to contact us and cooperate!

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