

Omnichannel 2018

Books, music, multimedia

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

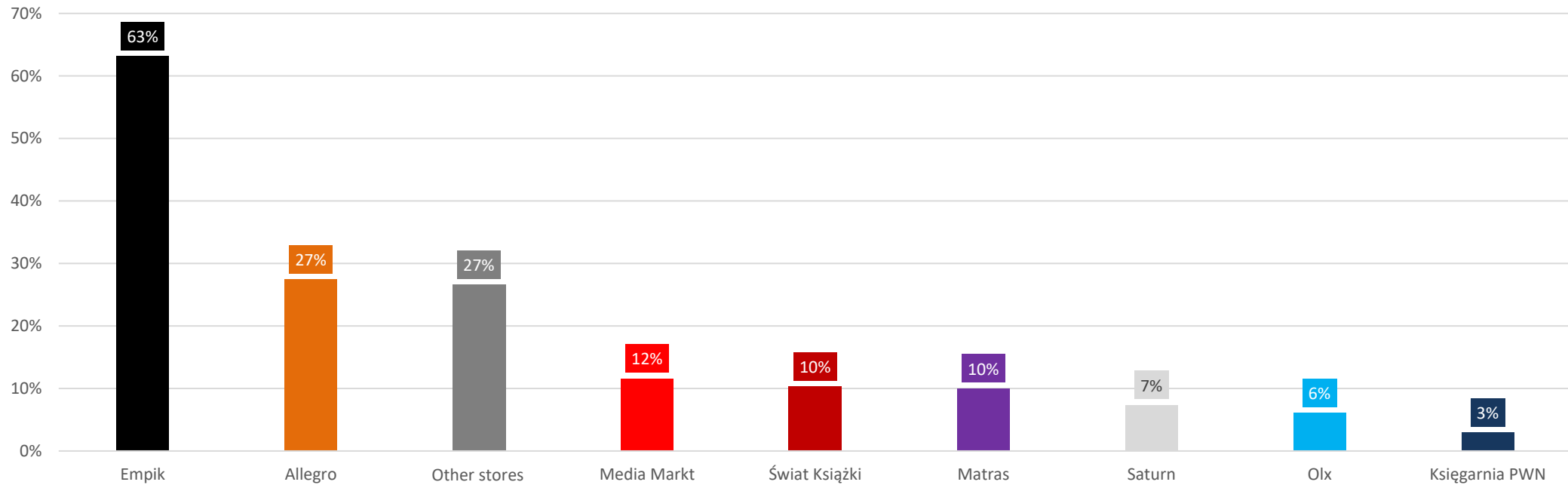


Research methodology

- 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 stores do you usually buy films, books, music or other multimedia?

Multiple-choice question

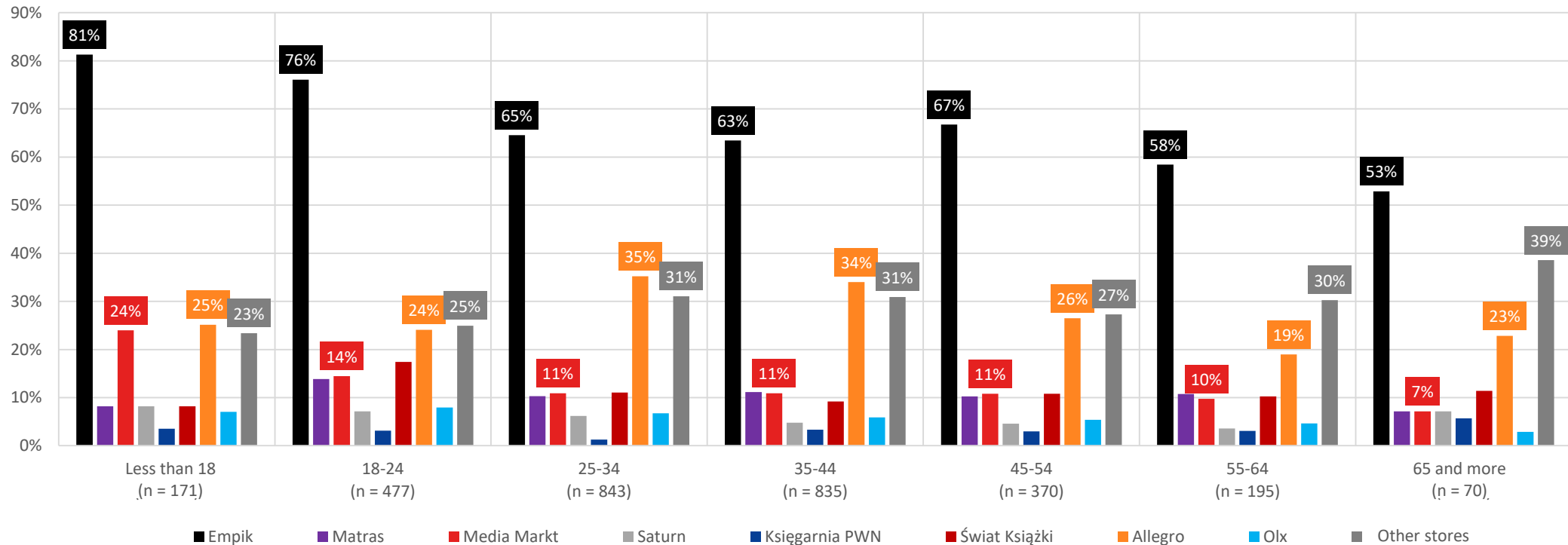


n = 4 597

The unquestionable leader on the Polish market is the Empik network, which is chosen by as many as 63% of users. On the second place Allegro platform (27%) and other smaller shops and bookshops (27%). Media Markt got a share of 12%, while Świat Książki and the Matras are preferred by every tenth respondent.

In which stores do you usually buy films, books, music or other multimedia?

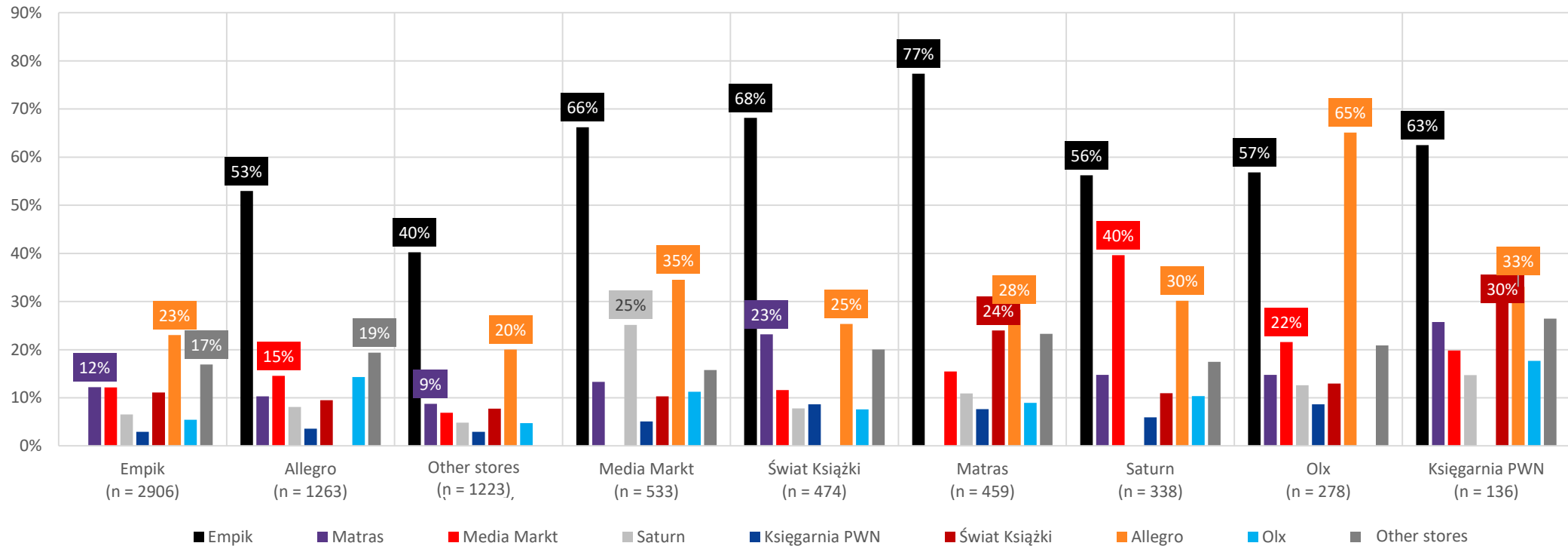
Analysis by age



Empik is by far the most popular among the youngest: as many as 81% of people under the age of 18 declare that this is where they usually shop. The Allegro platform is the most popular among people aged 25-34 (35%) and 34-44 (34%). The case of Media Markt is also interesting, where almost every fourth underage indicates this network, but the share among adults is already smaller, from 14% in the 18-24 age bracket to 7% among people over 65 years of age.

In which stores do you usually buy films, books, music or other multimedia?

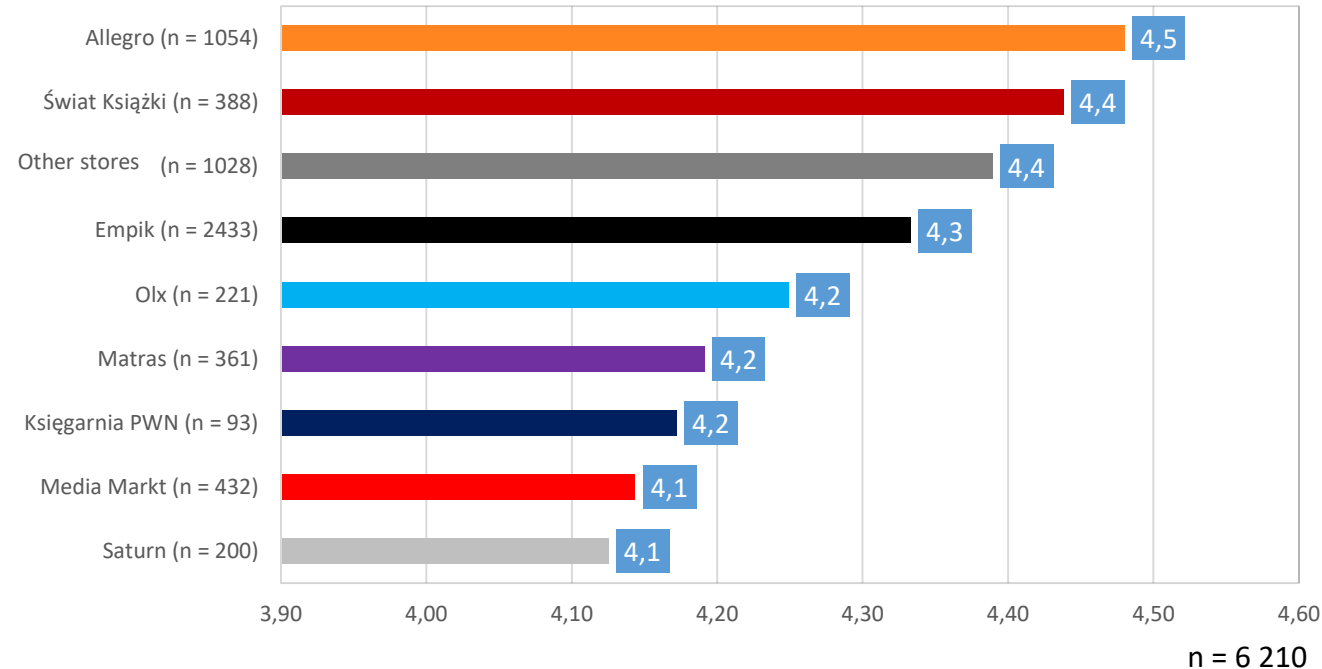
Corellations between brands



Empik customers rarely shop in other chains, most choose Allegro (23%) as an alternative. As many as 40% of customers of the already non-existent Saturn chain also pointed to shopping in Media Markt. More than half of Olx users also choose Allegro.

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

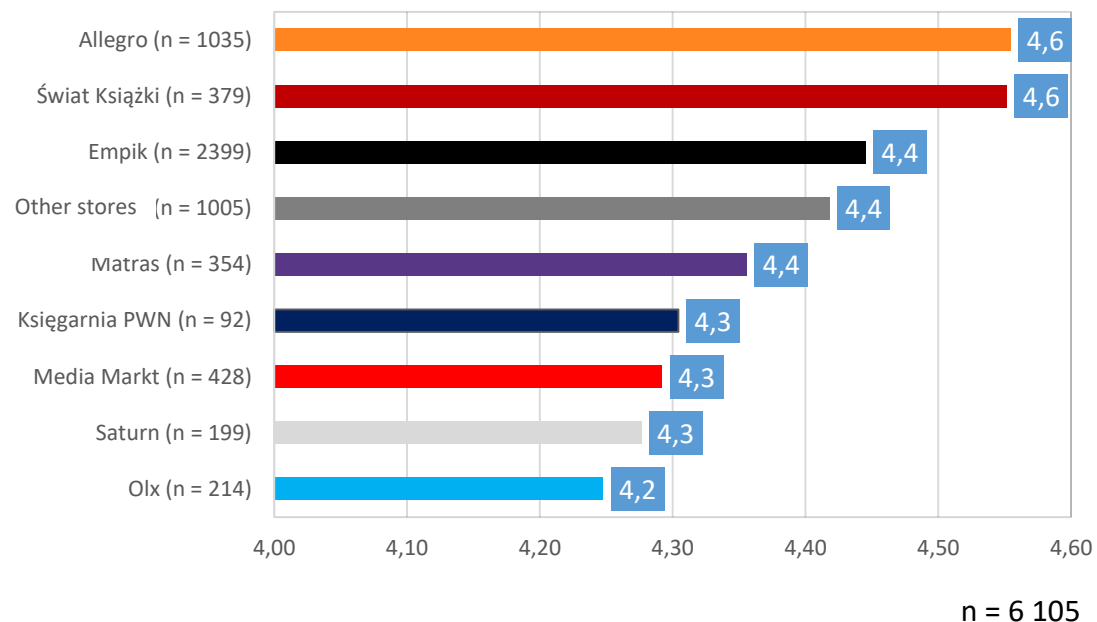
Evaluation on a scale from 1 to 5



Respondents were asked about the purchase goals achieved during the last purchases. A clear leader in the opinion of customers is Allegro, with an average score of 4.5. The second place is occupied by Świat Książki with a score of 4.4. The lowest average scores are awarded to Media Markt and Saturn with a similar score of 4.1. The market leader, i.e. Empik, ranks fourth.

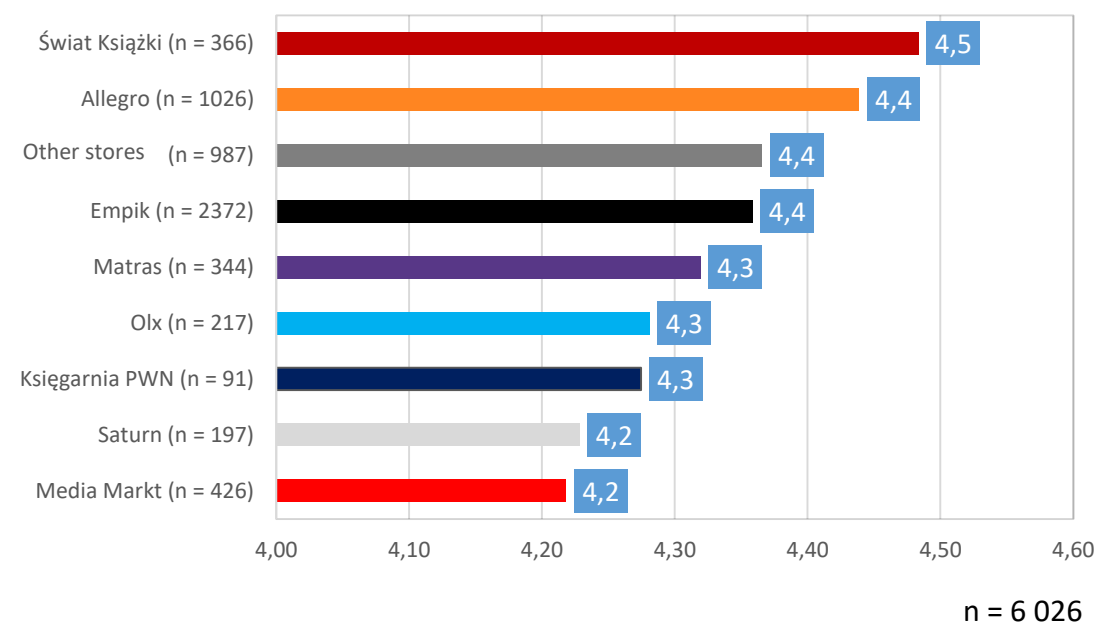
Evaluate the ease of purchase

Evaluation on a scale from 1 to 5



Rate satisfaction with your purchase

Evaluation on a scale from 1 to 5

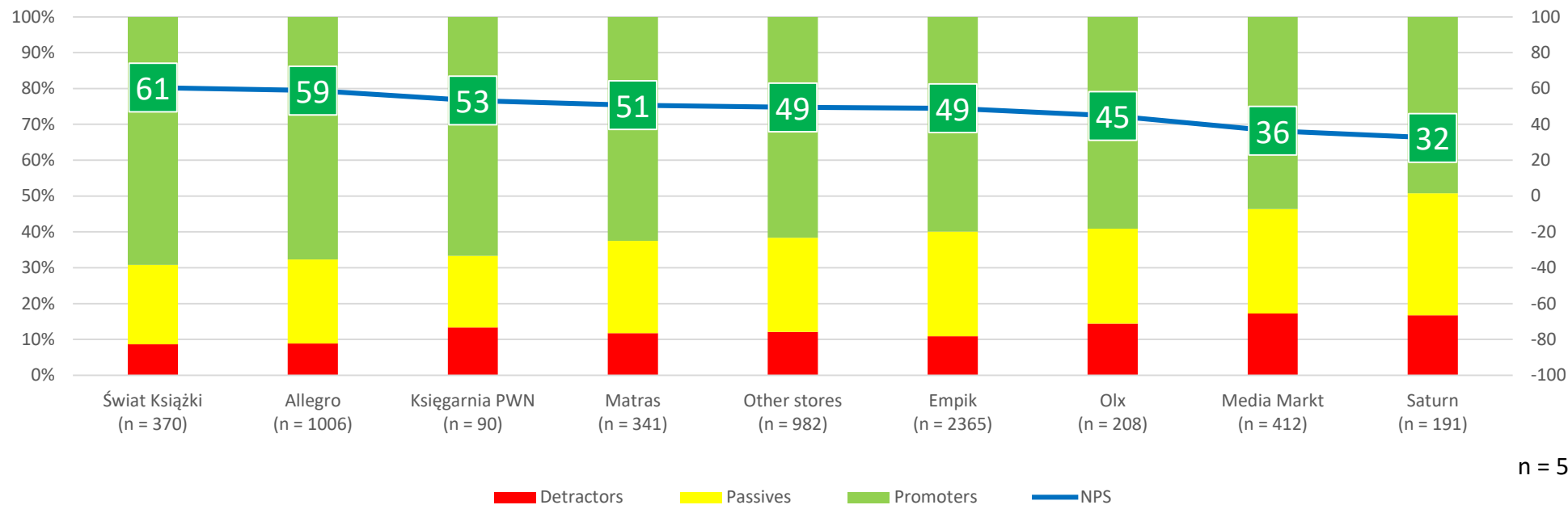


The ease of purchase is rated the highest by Allegro and Świat Książki clients, where the average is as high as 4.6. In this respect, the lowest score is recorded by the Olx platform: 4.2.

The general satisfaction with the last purchase is also the highest rated by the customers of Świat Książki: 4.5. Empik (4.4) and Matras (4.3) are in the middle of the rate.

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

Wskaźnik 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 definite leader is Świat Książki with the NPS index of 61, where almost 70% of customers who do their shopping there will be happy to recommend it to their friends. Then, in second place, the Allegro auction platform, which also aggregates the offers of numerous shops and bookshops, with a score of 59.

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 Promoters (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 Promoters, 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

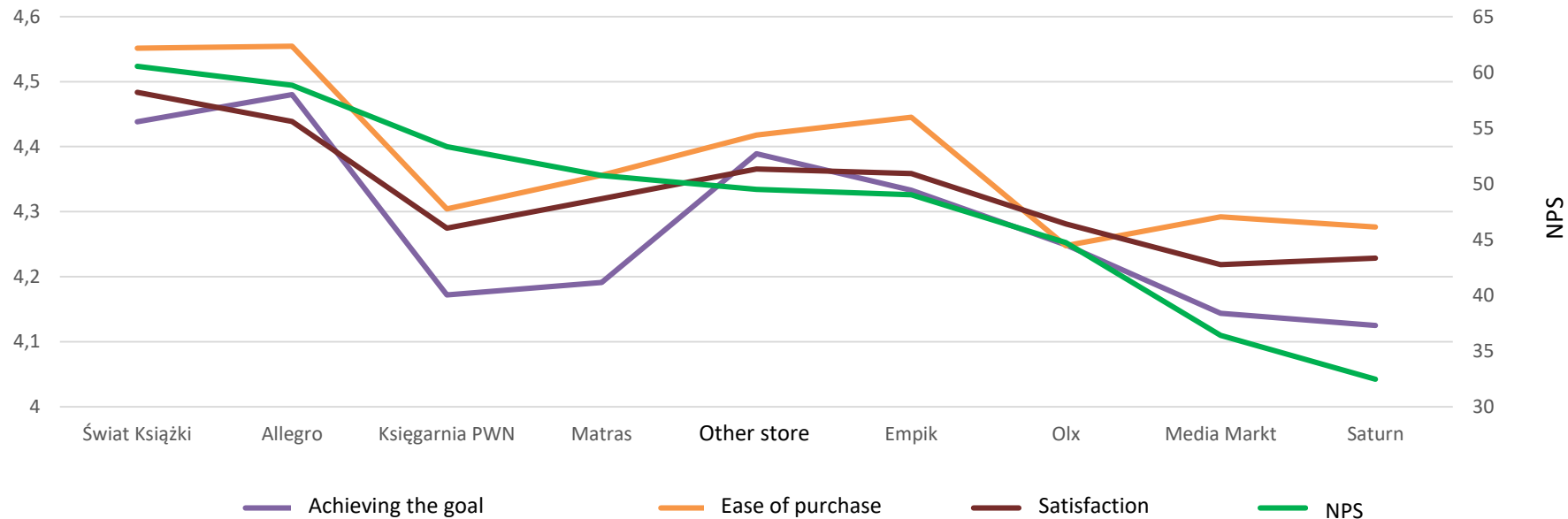
Project Manager

YourCX



Correlation analysis

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

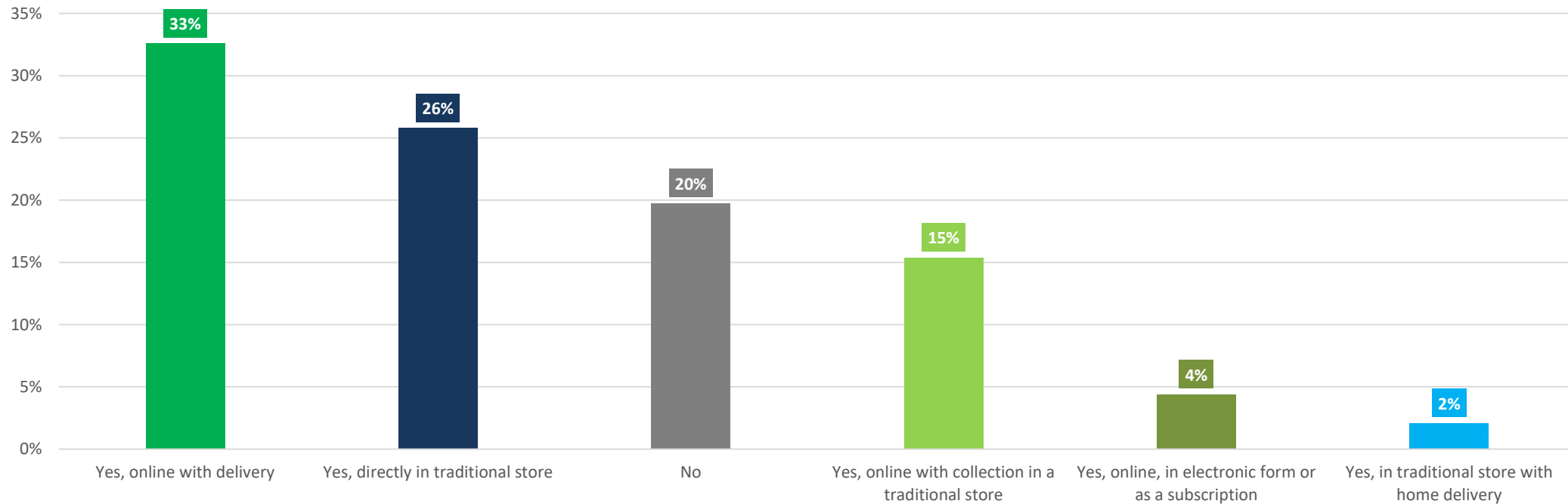


Correlations with NPS:
Achieving the goal = 0.59
Ease of purchase = 0.61
Satisfaction = 0.66

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.

Have you recently bought films, books, music or other multimedia?

Single-choice question

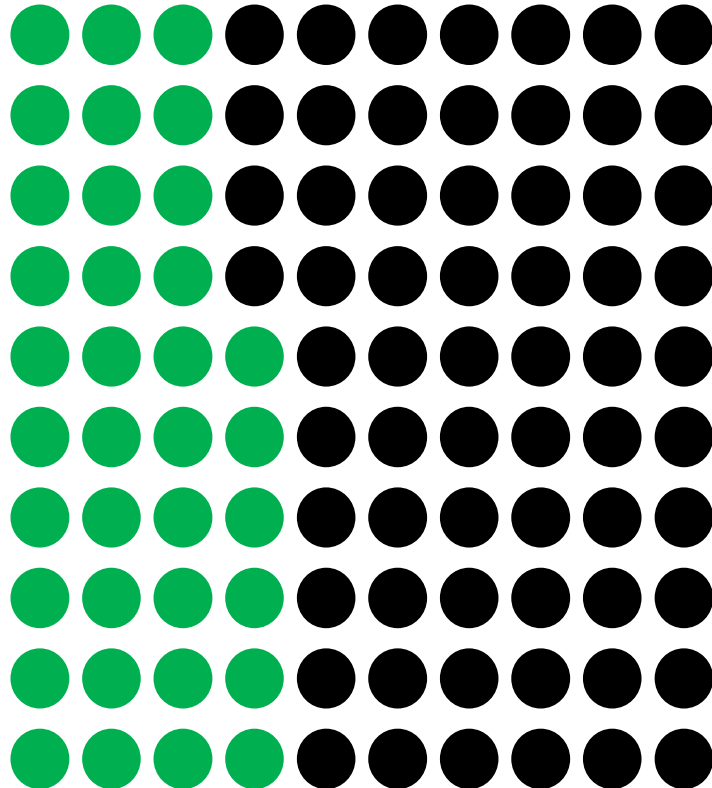


n = 4 127

Every third respondent (33%) chooses to buy online with delivery. Then 26% prefer to buy directly from a traditional store. The online channel with personal collection in the store chose 15%, and the online purchase in electronic form was recently made by only 4% of the respondents.

Are you looking for information on the Internet before buying films, books, music or other multimedia in a traditional store?

Single-choice question

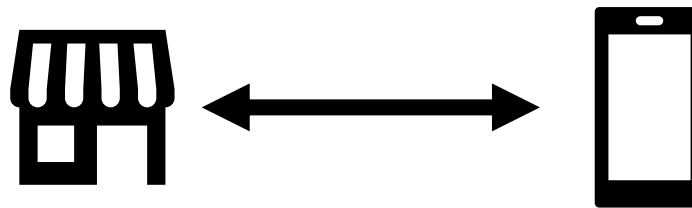


36%

always searches for information online before buying at a traditional point of sale. We call this phenomenon the **ROPO effect**. 20% do it often, 30% sometimes, 8% rather rarely and 6% at all.

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

Single-choice question



What information are you looking for?

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



77%

compares prices



44%

checks detailed information



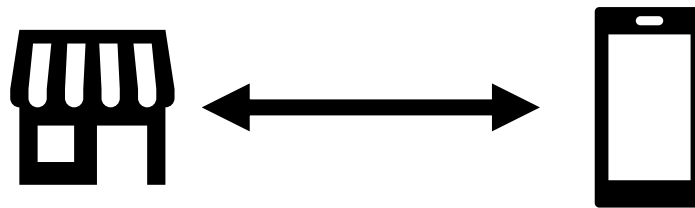
65%

looks for reviews



21%

seeks alternative options



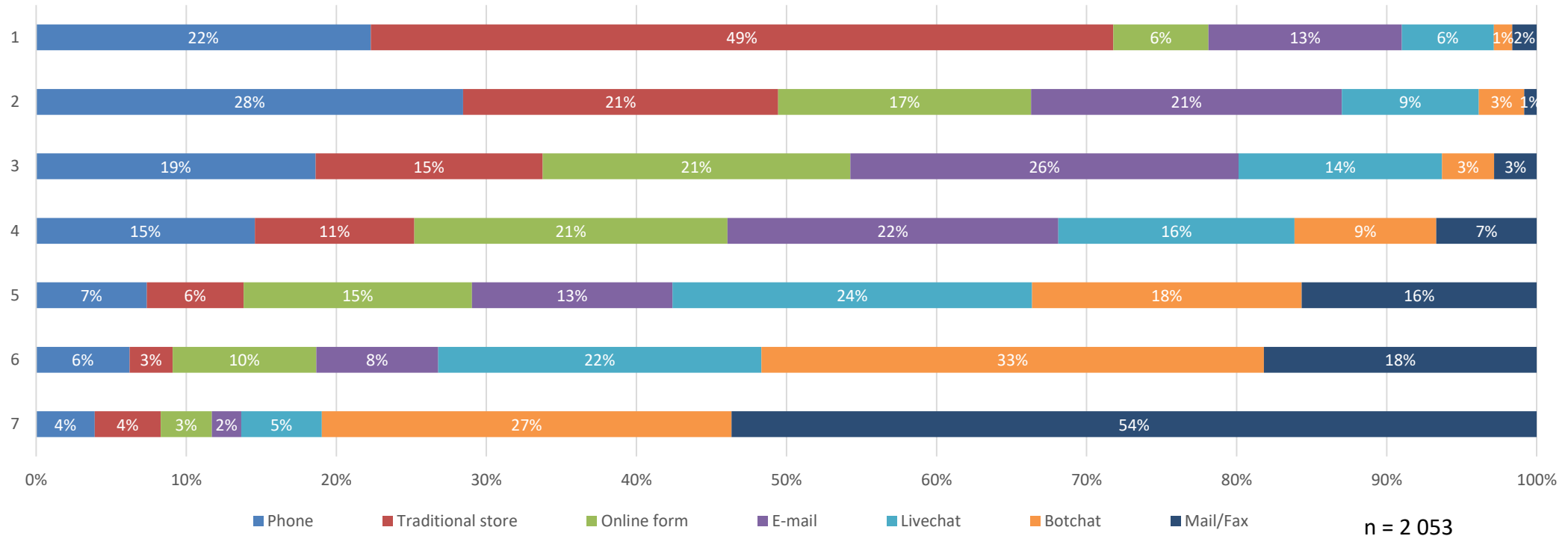
Do you use the help of the staff when shopping in a traditional store?

Single-choice question



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

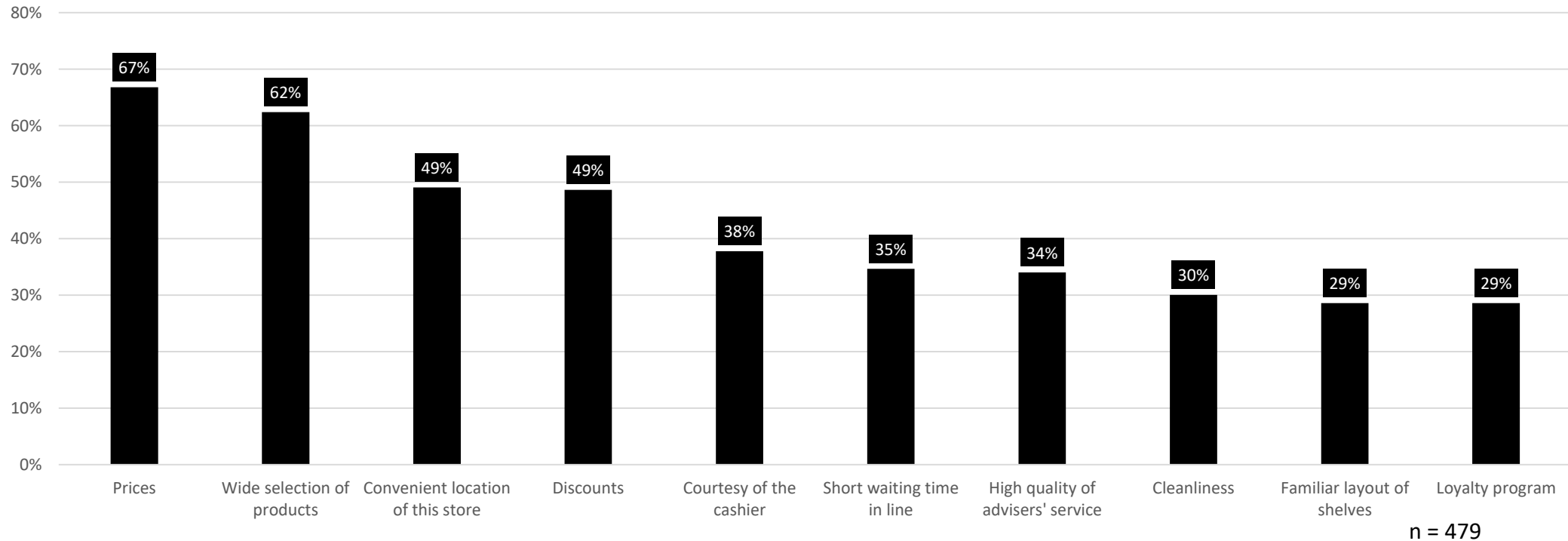
Starting with the way you prefer the most



Respondents ranked the channels of contact with a traditional store, starting with the one they prefer the most. The number one choice for 49% of respondents is personal contact in the store, 22% prefer the phone, and less than 13% will write an e-mail. The second choice channels are dominated by telephone contact (almost 28%). E-mail in the second position is chosen by 21% of respondents.

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

Multiple-choice question



Prices are one of the most important factors for 67%, while a wide selection of products is crucial for 62% of respondents. Every second respondent considers the convenient location of the store and attractive discounts to be important. The courtesy of the seller (38%), short waiting time in a queue (35%) and high quality service of advisors (34%) are also important factors for many people, 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



If they had time and desire to do so



Very often, regardless of the situation



They would not

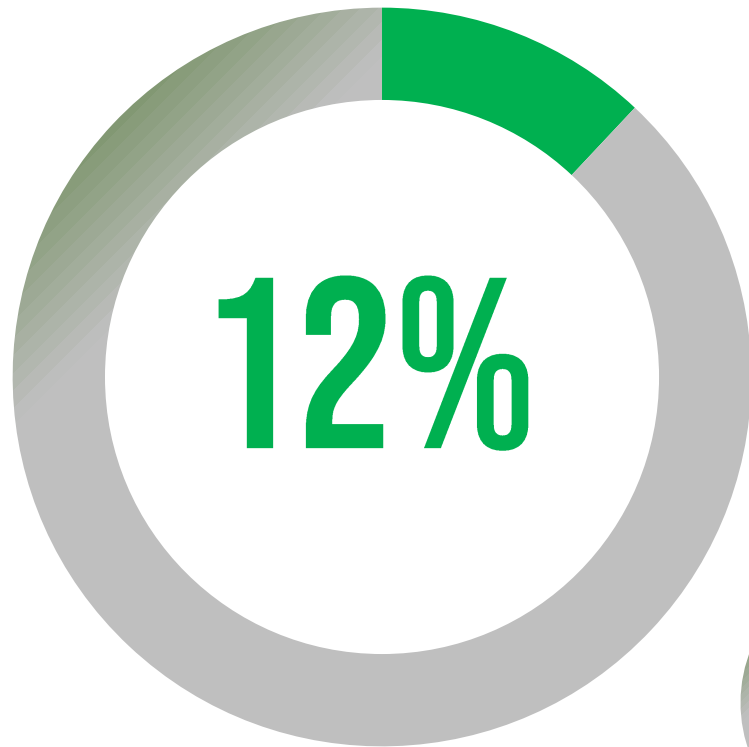


Will rate only in case of dissatisfaction



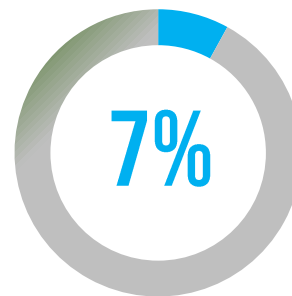
Do you visit traditional stores to get acquainted with the product before buying films, books, music or other multimedia via the Internet?

Single-choice question

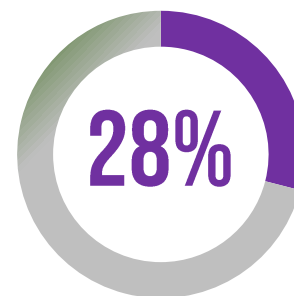


ALWAYS

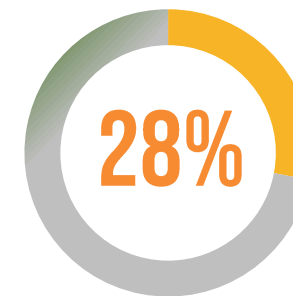
visits traditional store to get acquainted with the product before buying online.



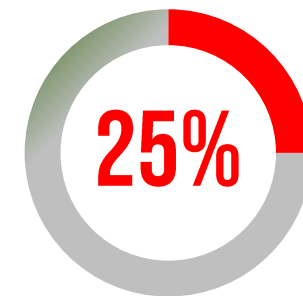
OFTEN



SOMETIMES



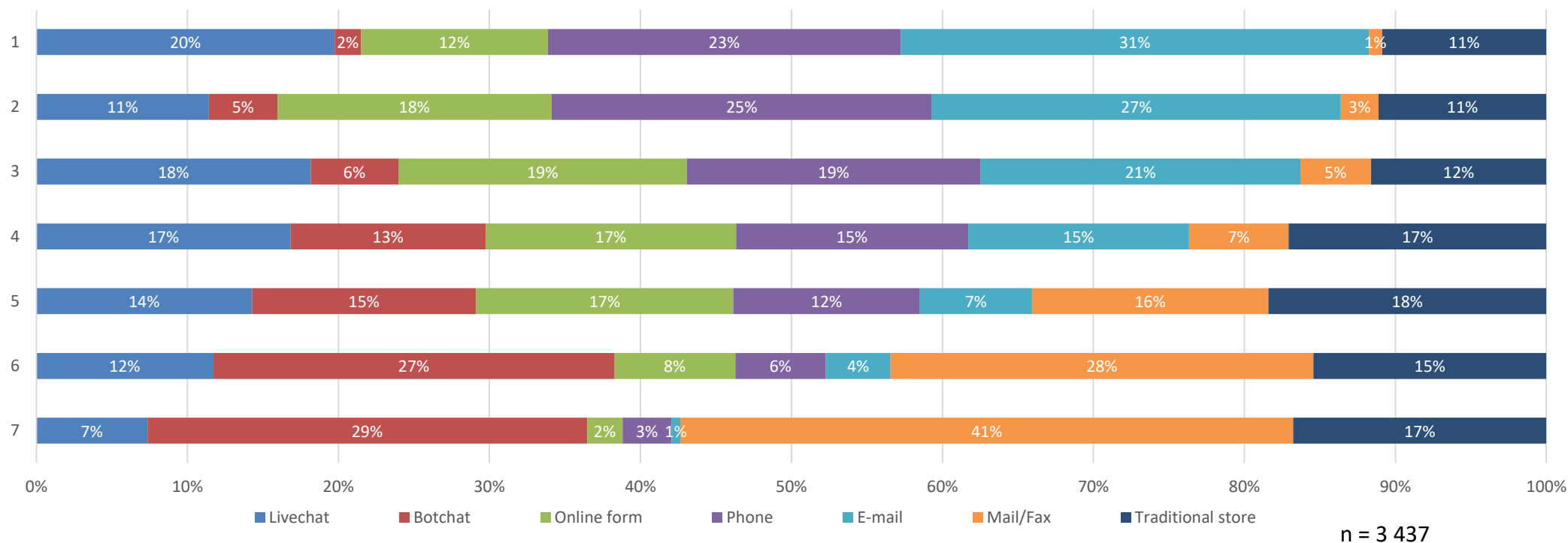
RARELY



NEVER

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

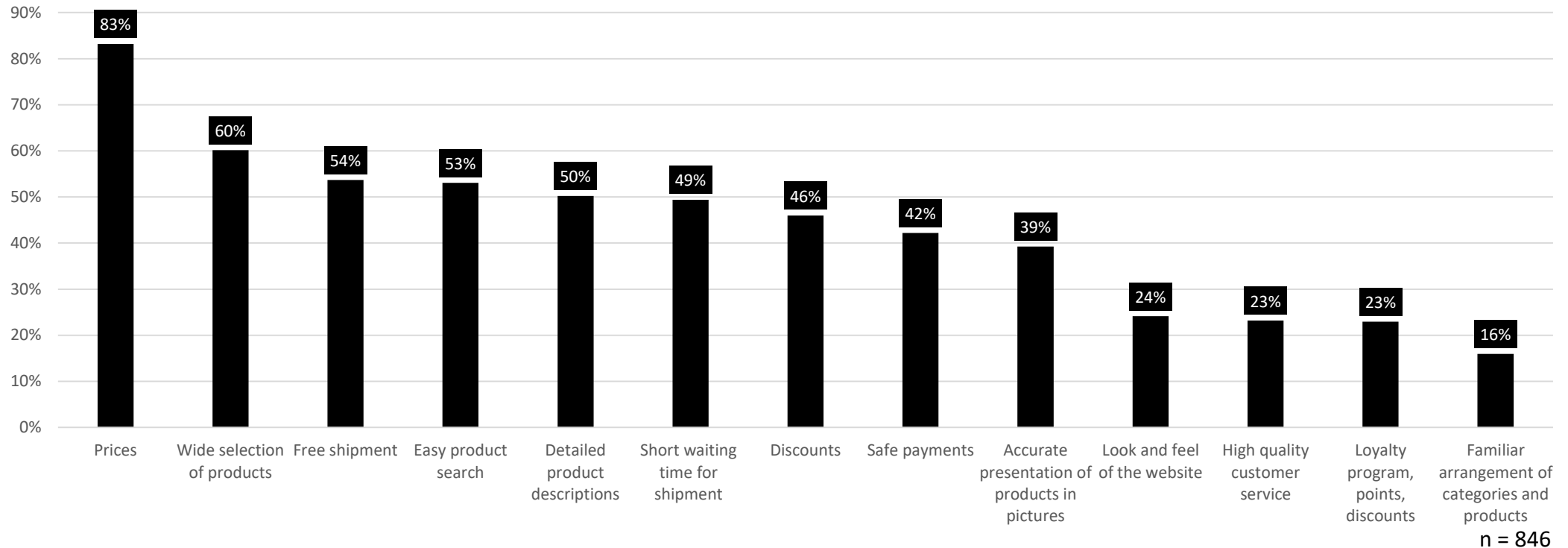
Starting with the way you prefer the most



Respondents ranked the channels of contact with the online store, starting with the one they prefer the most. The number one choice for 31% is email, 23% prefer telephone and 20% livechat contact. In the group of second choice channels, contact by phone chose 25%, and e-mail 27%. The online form in the second position is chosen by 18%.

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

Multiple-choice question



The most important factor in the online store are prices, which are indicated by 83% of the respondents. More than half of them also indicate a wide range of products (60%), free shipping (54%), easy search for products (53%) and detailed product descriptions (50%). Only 16% pay attention to the familiar layout of categories and products, so customers are open to changes even at the expense of habits.

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

Single-choice question



If they had the time
and willingness to



Very often, regardless
of the situation



Would not



Will evaluate only in
case of dissatisfaction



Omnichannel 2018

More reports can be found on our website!



**Telecommunication
services**



Cinemas



Fashion



Drugstores



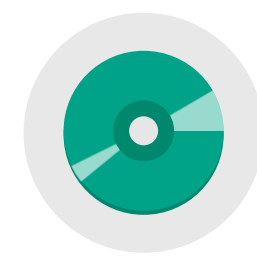
Sporting goods



House and garden



**Household
appliances**




**Books, music,
multimedia**

We invite you to contact us and **cooperate!**

Piotr Wojnarowicz

 p.wojnarowicz@yourcx.io

 +48 661 627 620

 yourcx.io

Your**CX**

Dystrybucja, kopiowanie i powielanie danych w jakiegokolwiek postaci jest możliwa tylko i wyłącznie po uzyskaniu pisemnej zgody ze strony YourCX sp. z o.o. z siedzibą we Wrocławiu, 54-135 Wrocław, ul. Murarska 59, zarejestrowana w rejestrze przedsiębiorców Krajowego Rejestru Sądowego pod numerem 0000636570, kapitał zakładowy 20 000 zł. Sąd rejestrowy: Sąd Rejonowy dla Wrocławia-Fabrycznej VI Wydział Gospodarczy KRS. NIP 8971828616. REGON 365372836.