YourCX

REPORT

OMNI CHA NNEL 2020

REPORT

OMNI CHANNEL 2020

Due to the current situation (COVID-19), when you can hear "stay at home" from all sides, we do much more shopping over the Internet. The latest data say that during one quarter the e-commerce market has recorded such a development as was planned for the coming years! However, the fight for the customer is getting more and more difficult, because not only the product itself and its price determine the purchase, but also all accompanying circumstances. Everything that meets a potential customer on the way to obtaining a product, i.e. presentation, ease, but also safety of its purchase, the possibility of return/exchange, and in this case the quality of after-sales service. All these and other steps taken to achieve the goal of the purchase affect the customer's experience and willingness to return and/or recommend a particular seller to family and friends.

How does it really look like?

The conclusions of the Omnichannel 2019 survey were very popular, and this year we conducted another edition of the survey extended to include an analysis of the experience of after-sales customer service and possible returns. In this year's edition it was very important for us to compare the data with previous years, identify trends and obtain the largest possible research samples.

I would like to thank our Partners and everyone who took part in the implementation of OMNICHANNEL2020. I hope that the collected results will help to better understand buyers and encourage everyone to further develop Customer Experience programs, which ultimately serve us all.

Piotr Wojnarowicz
YourCX CEO

RESEARCH METHODOLOGY

- Qualitative data of a quantitative nature collected **anonymously and voluntarily**, without any gratuities for respondents;
- Survey can be participated and completed only **once online**;
- Survey target group corresponding to the cross-sectional Internet user profile in Poland;
- Range of over **1,700,000 consumers** obtained thanks to survey partners;
- Over **170,000 completed** questionnaires;
- **Multi-page** survey, consisting of cascading questions, without obligatory questions, with demographic questions at the beginning;
- **Standardized** question sets for each segment with a limit of 2 segments per survey;
- A common measure of NPS methodology for offline and online shopping;
- Survey implementation: **August-September 2020**;
- Selected e-commerce segments reflect the key project industries of YourCX;
- **Survey partners**: CCC, Leroy Merlin, Multikino, Orange, Play, Super-Pharm, T-Mobile;
- The data presented in the report come from the websites of other research partners than the partner from this industry;

The study will be summarised in the form of separate reports for each of the analysed industries;

YOUR CUSTOMER EXPERIENCE INDEX

The purpose of the Your Customer Experience Index was to better differentiate companies with similar results and to identify real experience leaders.

Therefore, only exceptionally good (exceptional) and very negative (terribly and poorly) experiences are taken into account in the calculation of values. In case of NPS question we have fulfilled the assumption by taking into account promoters and critics.

We treat all four indicators (product availability, ease of purchase, satisfaction with purchase, NPS) as equally important, so each of them has the same weight and has been scaled to a value from the range [0, 250], so that the final result has a value from the range [0, 1000].

intermediate value = %exceptional - %poorly - %terrible
intermediate value NPS = NPS / 100
final value = (intermediate value + 1) * 125
final result = Σ final values

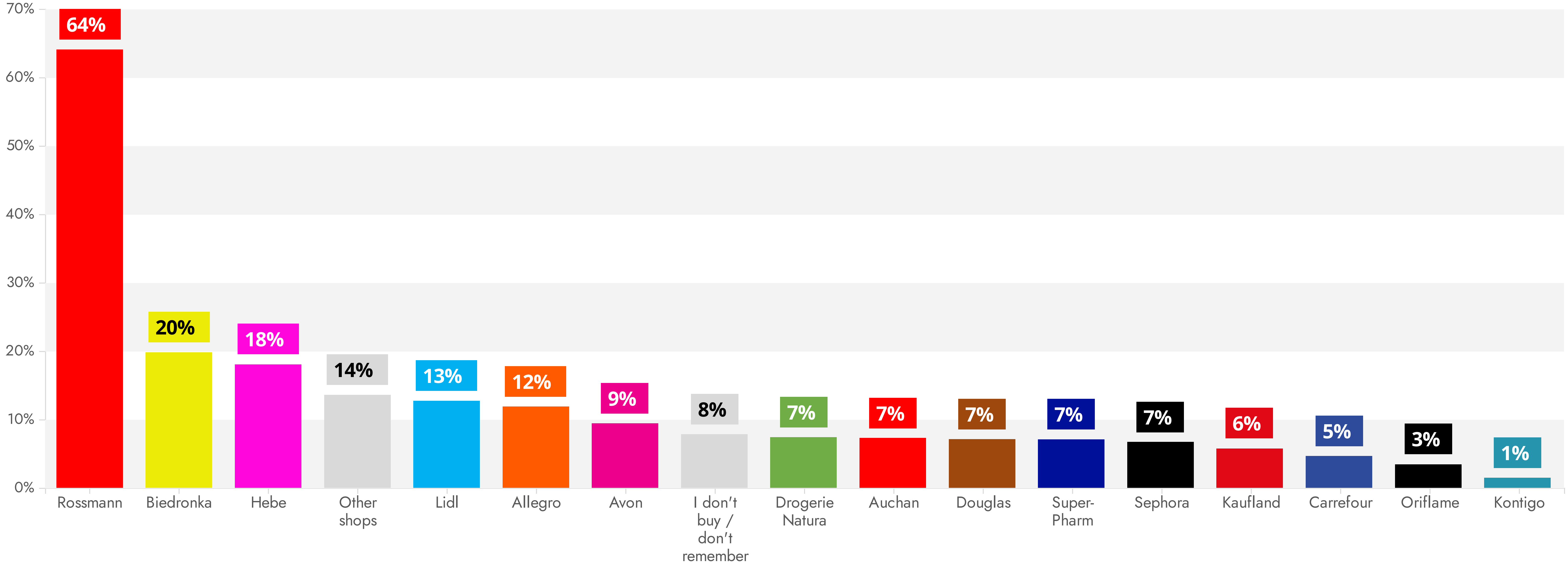
CALCULATION EXAMPLES FOR COMPANY XYZ

	terribly	poorly	so-so	well	exceptional	average	bottom line
Availability of products	11%	2%	40%	30%	18%	0,06	**132,5**
Ease of purchase	5%	9%	15%	49%	22%	0,08	**135**
Satisfaction with the purchase	1%	3%	28%	31%	37%	0,33	**166,25**
NPS = 40						0,4	**175**
Final result							**608,75**

WHERE HAVE YOU RECENTLY BOUGHT COSMETICS, PERFUMES OR HYGIENE PRODUCTS?

Multiple choice question

n = 8619

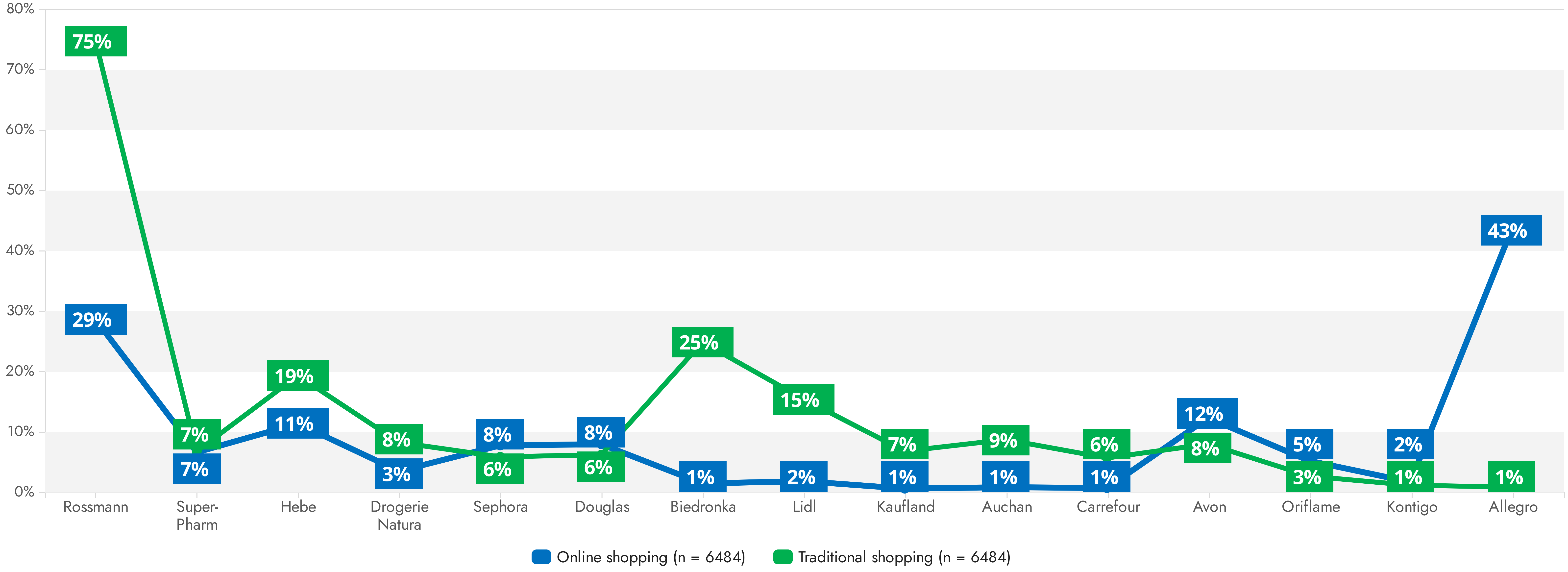


Rossmann has the largest fixed-line sales network and is probably also the reason why it is an unquestionable market leader, as many as 65% of the respondents in the last one did their shopping there. Biedronka is in second place, indicated by every fifth respondent, while Hebe is in third place - 18%. Only 8% of the respondents did not buy products from this category recently. The results are aggregate for all shopping channels (including online and traditional shopping).

WHERE HAVE YOU RECENTLY BOUGHT COSMETICS, PERFUMES OR HYGIENE PRODUCTS?

Market shares by purchasing channel

n = 2109 online purchase, 6484 stationary purchase

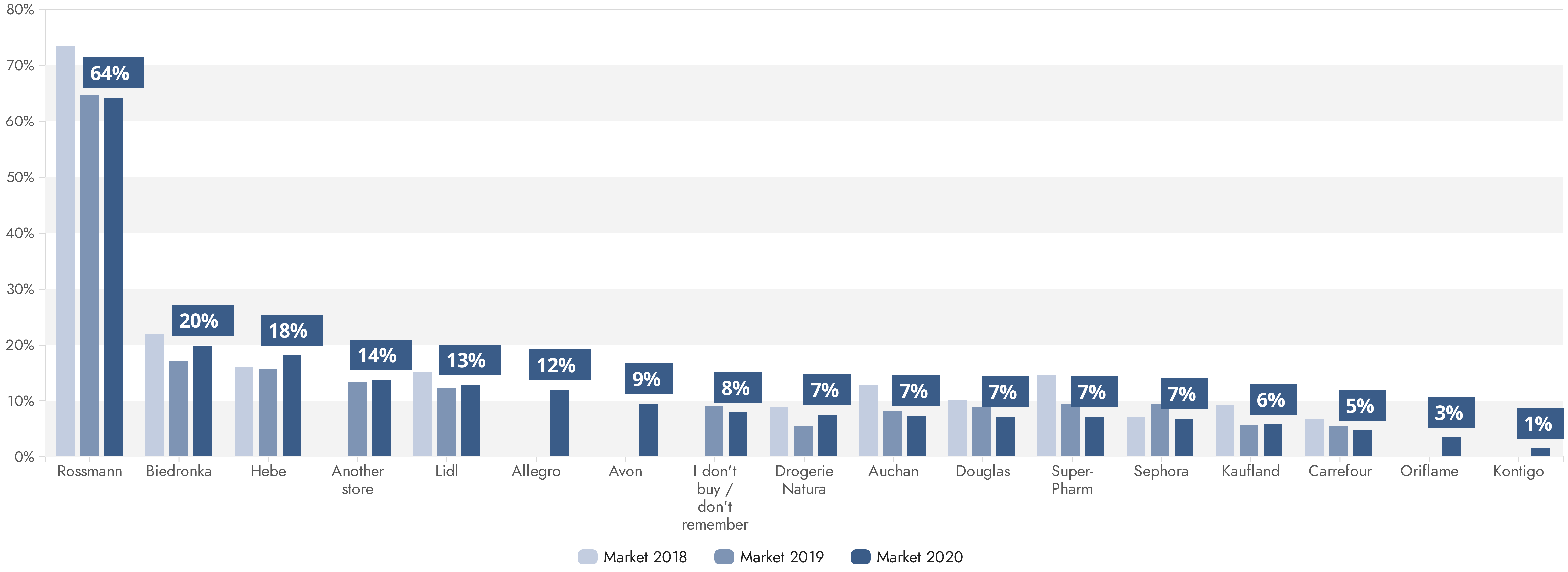


The vast majority of respondents buy products from this category in stationary stores and as much as 75% of them do so in Rossmann stores. In the online channel, the sales leader is Allegro, followed by Rossmann, Avon and Hebe.

WHERE HAVE YOU RECENTLY BOUGHT COSMETICS, PERFUMES OR HYGIENE PRODUCTS?

Comparison of total market shares with last year's survey results

n 2018 = 3582, 2019 = 4838, 2020 = 8619

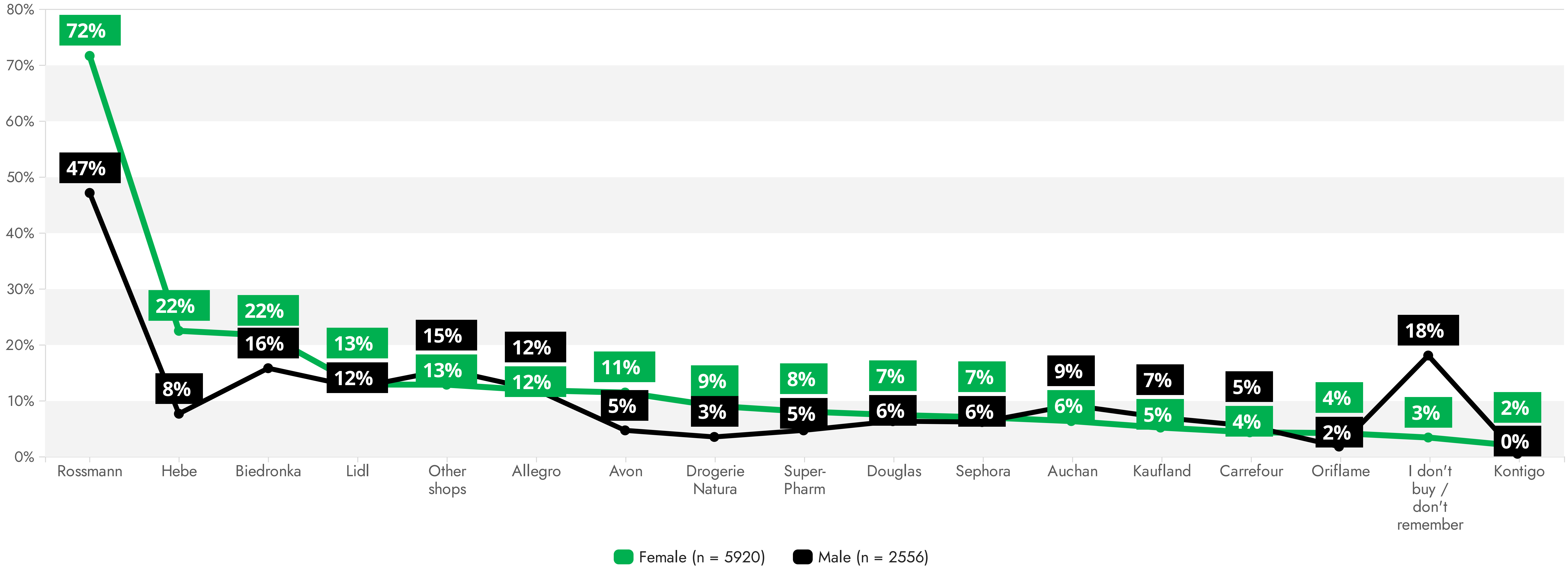


Comparing the results of omnichannel 2020 with last year's edition of the survey, we see a slight decrease in the share of purchases in the Rossmann chain and an increase in the share of purchases in Biedronka or Hebe stores.

WHERE HAVE YOU RECENTLY BOUGHT COSMETICS, PERFUMES OR HYGIENE PRODUCTS?

Analysis by gender

n = 8476

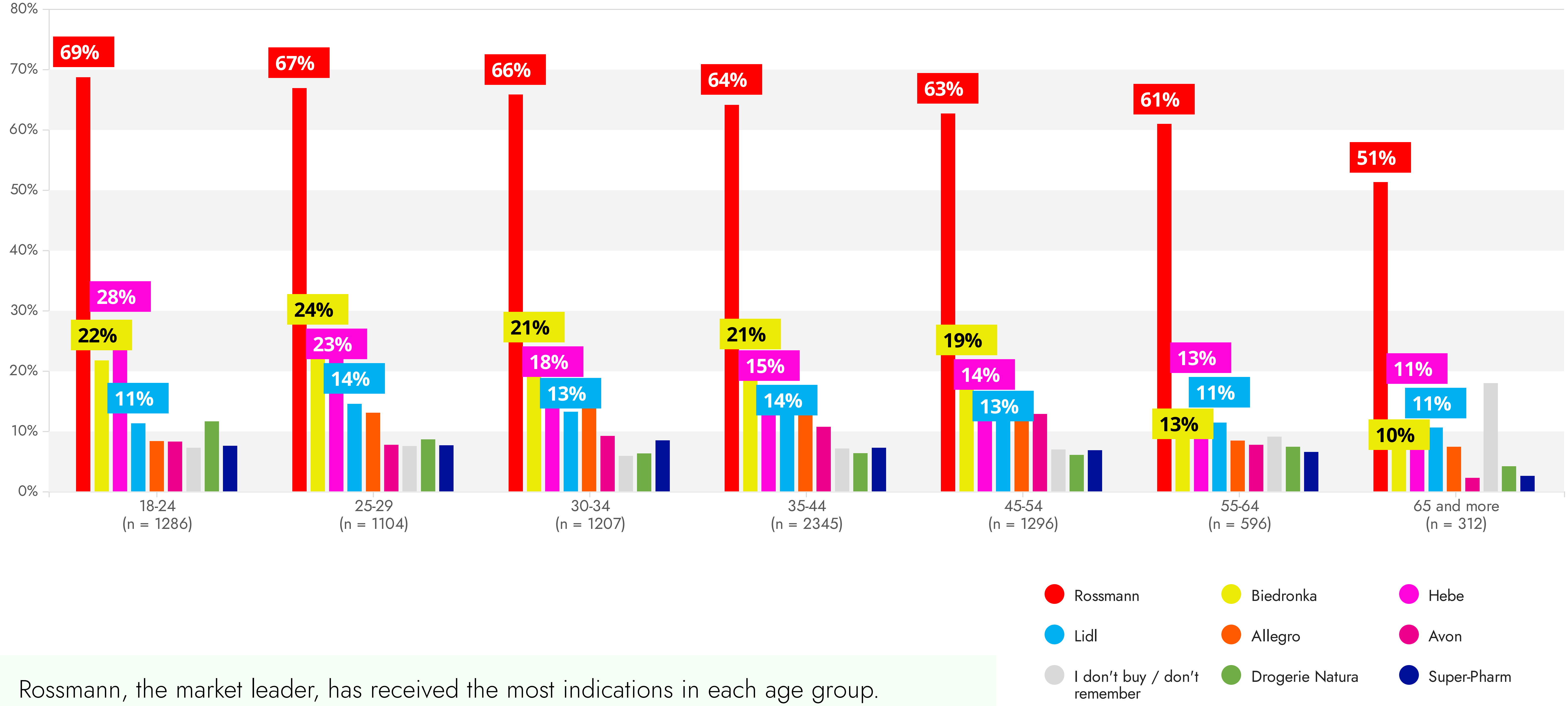


It is no surprise that women buy this type of products more often than men, but regardless of gender, we usually go to Rossmann stores to buy it. Ladies also prefer Hebe and Biedronka shops, gentlemen also Biedronka and other shops.

WHERE HAVE YOU RECENTLY BOUGHT COSMETICS, PERFUMES OR HYGIENE PRODUCTS?

Analysis by age

n = 8346

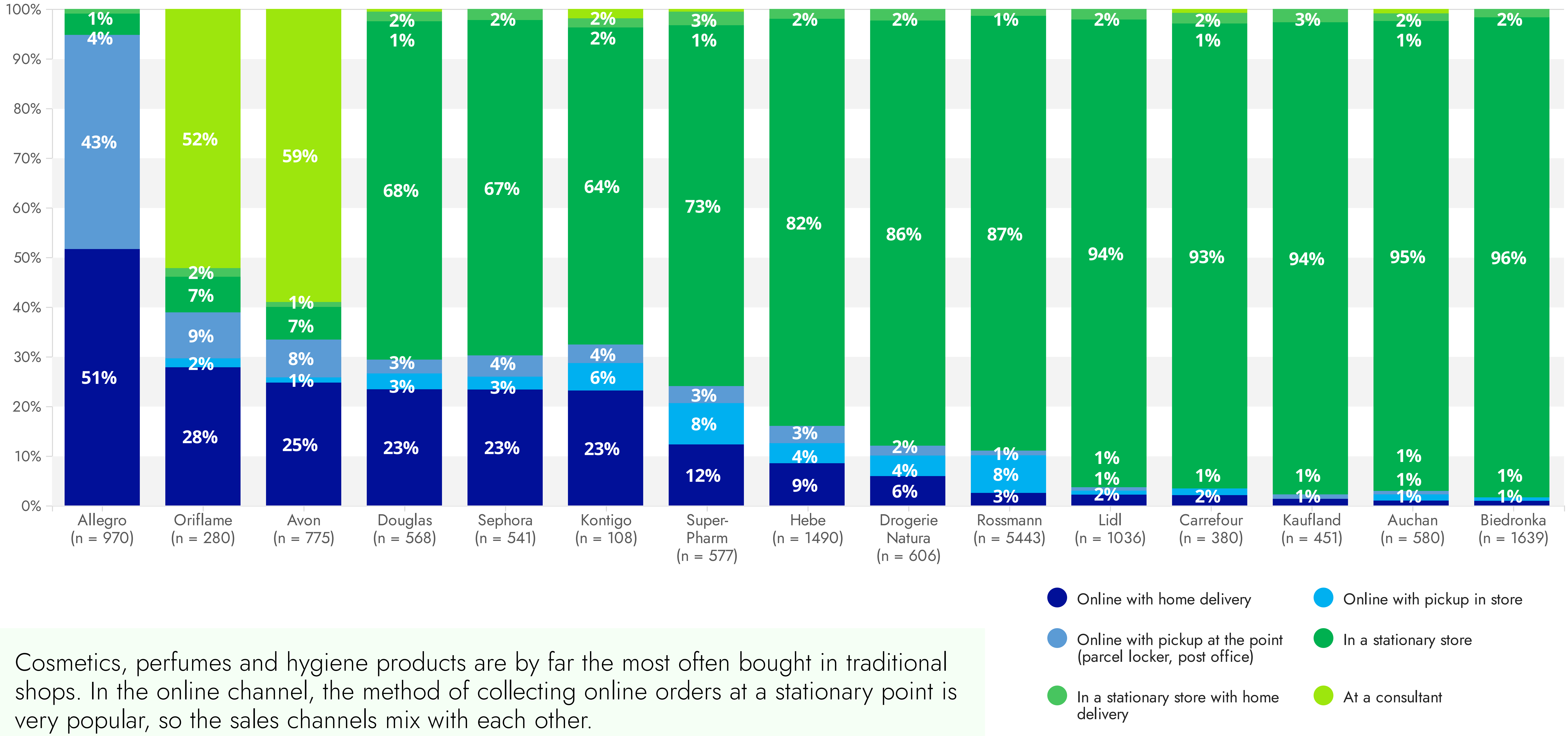


Rossmann, the market leader, has received the most indications in each age group. Biedronka has significantly fewer customers in the 55+ age group than in the other groups.

HOW DID YOU BUY THE PRODUCTS THERE?

Selected purchase channel - single-choice question

n = 7311



Cosmetics, perfumes and hygiene products are by far the most often bought in traditional shops. In the online channel, the method of collecting online orders at a stationary point is very popular, so the sales channels mix with each other.

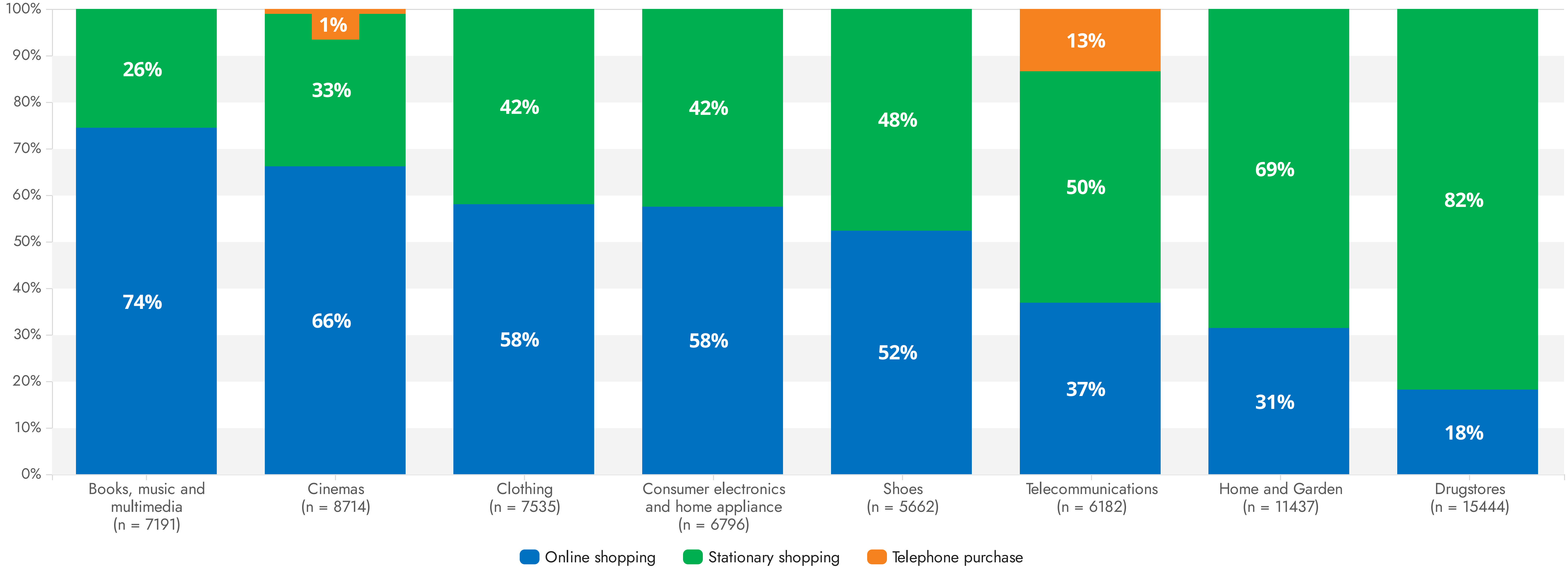
HOW DID YOU BUY THE PRODUCTS THERE?

Selected purchasing channel - Omnichannel 2020 with changes from 2019

	Online with home delivery	Online with pickup in store	Online with pickup at the point (parcel locker, post office)	In a stationary store	In a stationary store with home delivery	Result count
Rossmann	2.55% +1.04pp	7.55% +0.79pp	0.96% +0.49pp	87.29% -2.79pp	1.38%	5443
Biedronka	0.98% -0.4pp	0.67% -0.57pp		96.22% +1.6pp	1.65%	1639
Hebe	8.52% +7.13pp	4.03% +3.1pp	3.49% +3.49pp	81.81% -14.02pp	1.95%	1490
Lidl	2.22% +0.27pp	0.77% -0.2pp	0.68% -0.29pp	94.02% -0.52pp	2.12%	1036
Drogerie Natura	5.94% +4.15pp	4.13% +2.34pp	1.98% +1.08pp	85.64% -8.98pp	2.31%	606
Super-Pharm	12.31% +9.42pp	8.32% +4.12pp	3.47% +2.95pp	72.62% -17.67pp	2.77%	577
Douglas	23.42% +11.2pp	3.17% -5.44pp	2.82% +0.6pp	68.13% -6.04pp	1.94%	568
Sephora	23.29% +12.52pp	2.59% +0.28pp	4.25% +1.69pp	67.28% -15.54pp	2.22%	541

CROSS-SECTION BETWEEN INDUSTRIES - HOW DID YOU BUY THE PRODUCTS THERE? - INCLUDING ALLEGRO

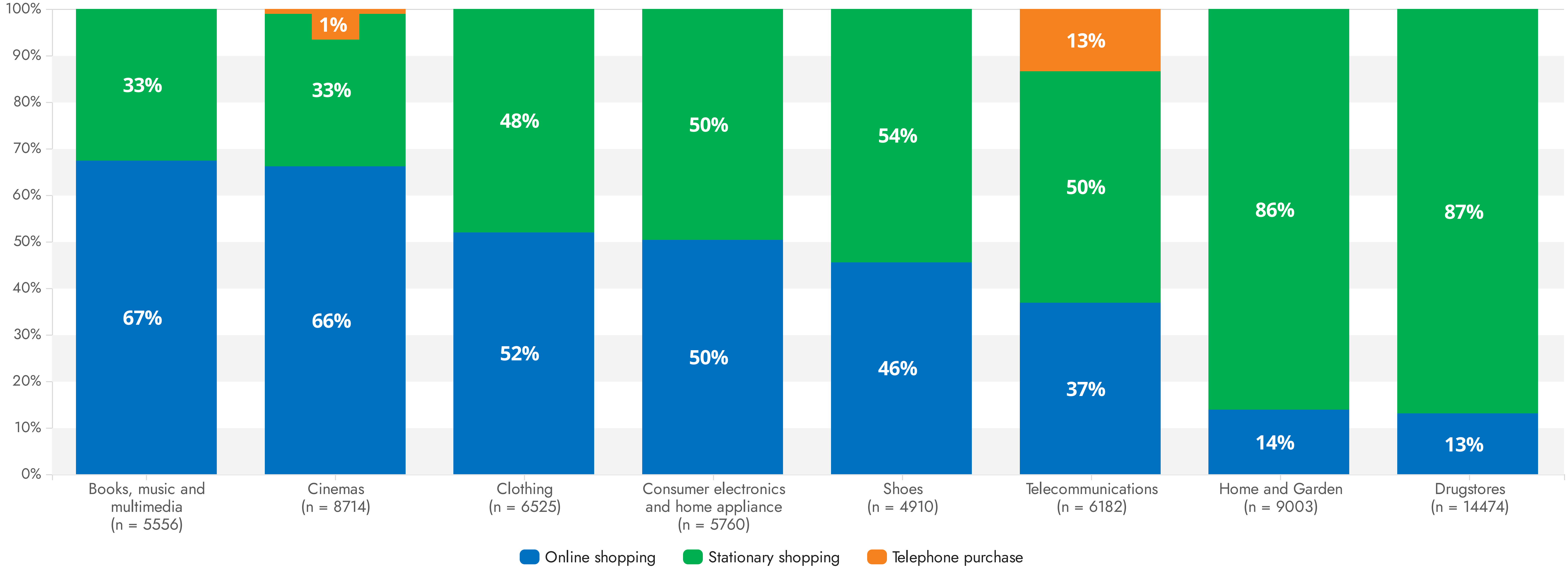
Comparison of selected channels between industries



Comparing the methods of purchasing cosmetics and hygiene products with the sectors studied by Omnichannel 2020, we can see how important an extensive network of stationary sales is for this sector. In this respect, the sector can only be compared with the DIY industry (home, garden, DIY).

CROSS-SECTION BETWEEN INDUSTRIES - HOW DID YOU BUY THE PRODUCTS THERE? - WITHOUT ALLEGRO

Comparison of selected channels between industries



The large differences in the share of online shopping on the above analysis compared to the previous page show how strong Allegro is on the Polish market.

EXPERIENCE QUALITY INDICATORS

p. 15

The study developed by the YoruCX team is one of the more in-depth analyses of the Polish e-commerce market, including digital service sales channels. Thanks to a number of collected parameters, the study enables a deep look at individual aspects of the processes around sales. An additional advantage is the fact that this is the next edition of the study, so it was possible to compare data with information from previous years.

As UX specialists for e-commerce, IDEACTO has supported the analysis of the report's results in terms of what is or may be important for users in the context of shopping. The study provides many insights to improve the user experience on the one hand, and on the other hand, thanks to its hints, it is possible to optimize elements of the offer in order to improve business parameters and finally increase profit.

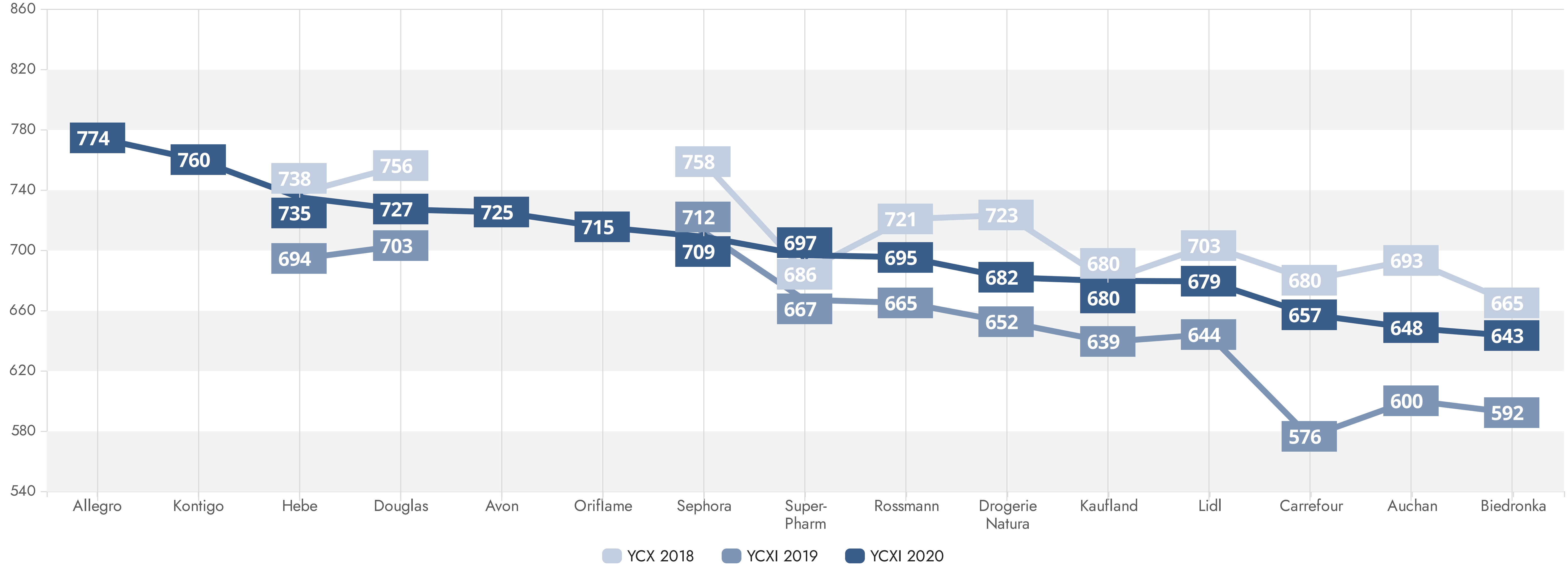
Bearing the above issues in mind, the report may be an important useful tool not only for interaction designers, but also, and perhaps most importantly, for the owners and managers of e-commerce platforms or people responsible for omnichannel sales in their organizations.

Nikodem Krajewski
IDEACTO CEO

IDEACTO

YOUR CUSTOMER EXPERIENCE INDEX

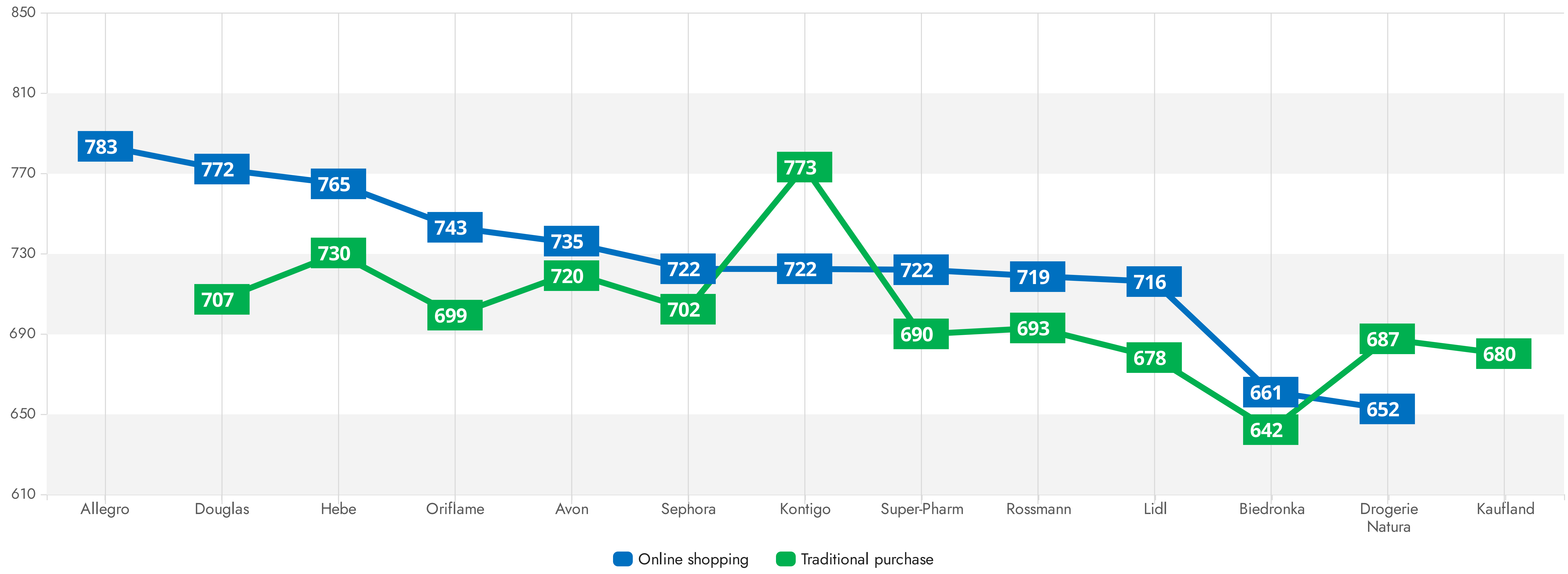
Quality indicator on a scale from 0 to 1000 taking into account four satisfaction factors:
availability and choice of products, ease of order placement, satisfaction with the purchase, willingness to recommend the store to friends



The Your Customer Experience Index quality indicator is intended to help differentiate more easily between companies with similar scores in the subquestions and to indicate real quality leaders on a scale from 0 to 1000. As you can see, there is still a lot of potential to do if companies have scored around two thirds of the possible points. Industry leaders are Allegro, Kontigo, Hebe, Douglas and Avon. Most of the companies surveyed have improved their performance compared to the previous year.

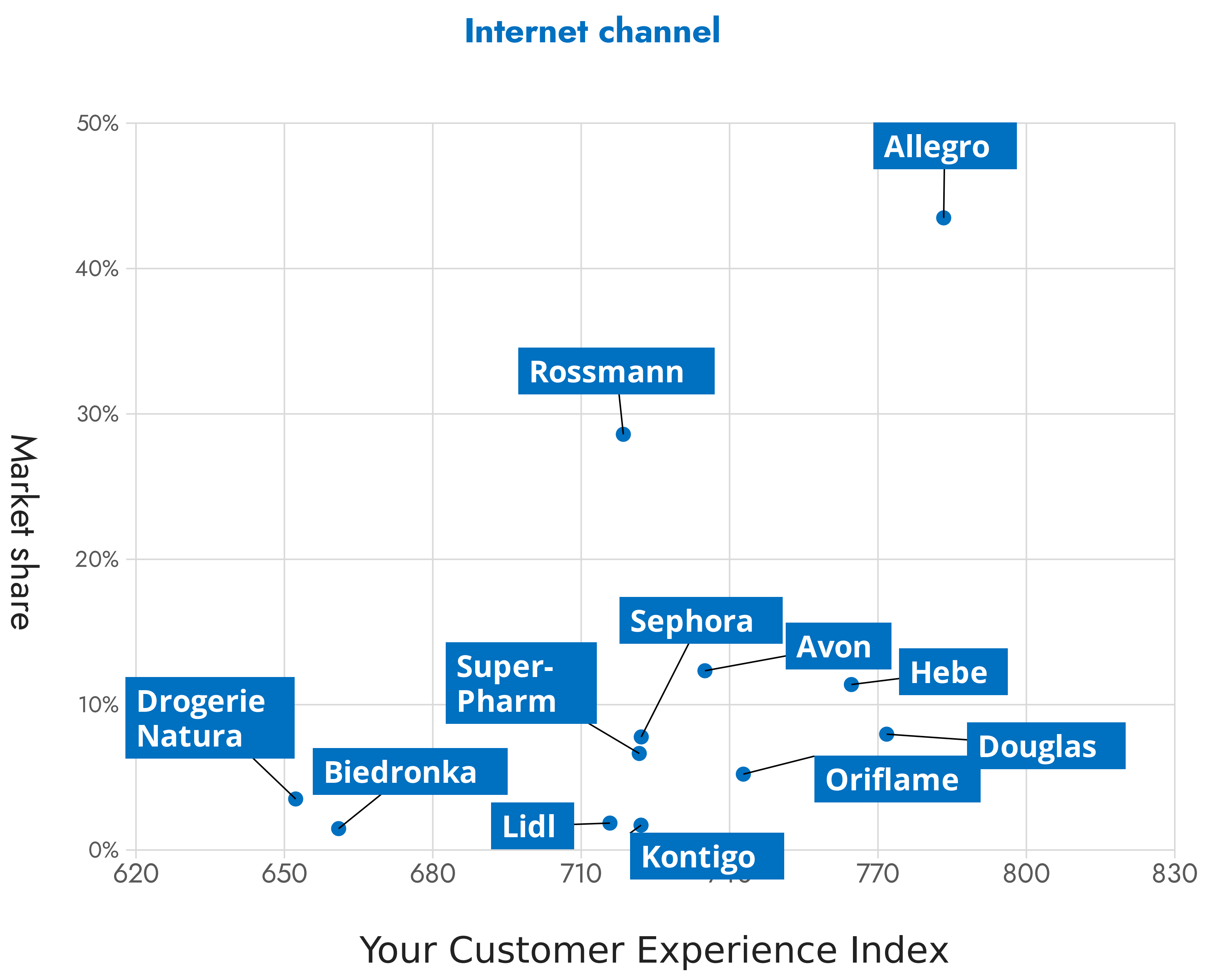
YOUR CUSTOMER EXPERIENCE INDEX

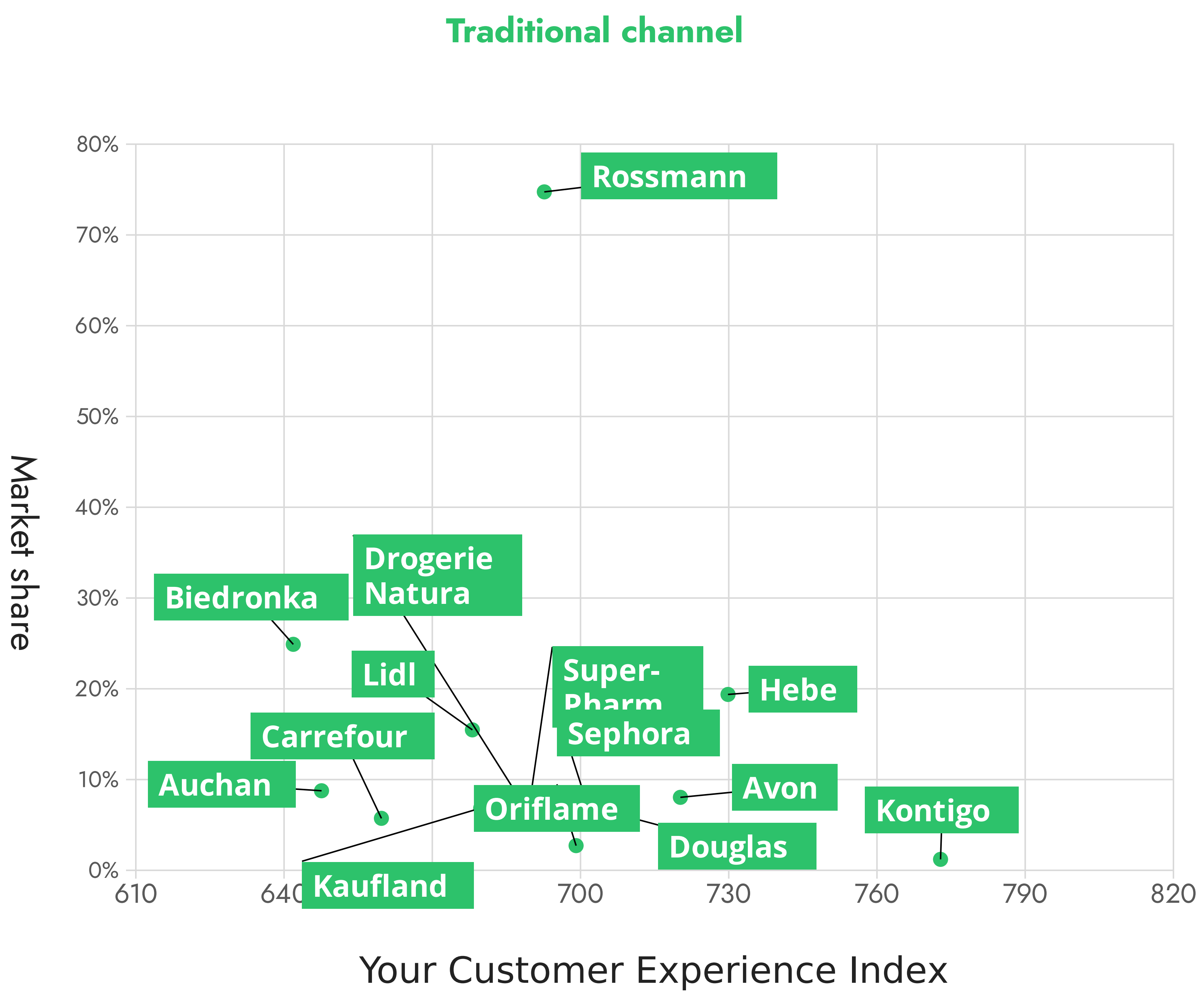
Quality indicator on a scale from 0 to 1000 with a division by purchasing channel



Douglas can boast a high quality rating in the online channel, but also the biggest difference in ratings between the channels - a rating over 60 points higher than in the traditional channel. Customers' experience of traditional sales is at the highest level in Kontigo, where the fixed-line sales ratio is 50 points higher than that of online sales.

YOUR CUSTOMER EXPERIENCE INDEX

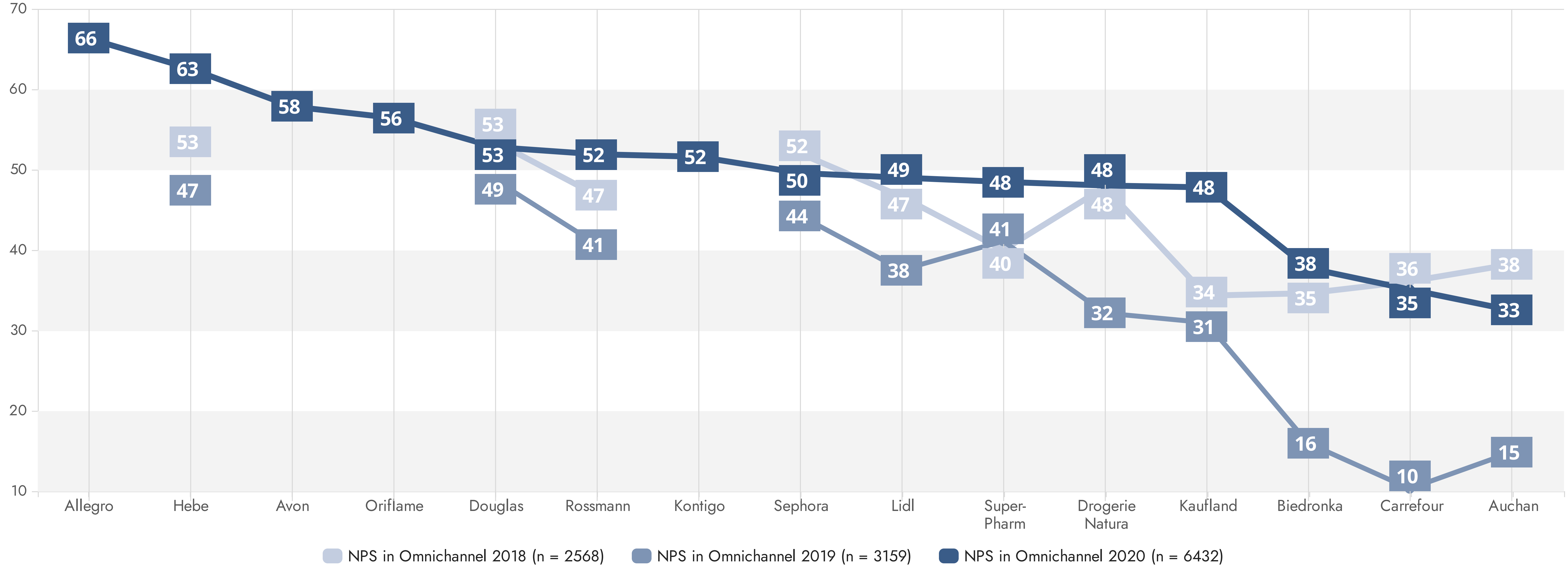




The charts show market shares depending on the sales channel and the value of Your Customer Experience Index. The Internet channel is dominated by Allegro having both the largest market share and the highest value of the index. In the fixed channel, Rossmann has the largest share, but it is far from the leader in the area of experience.

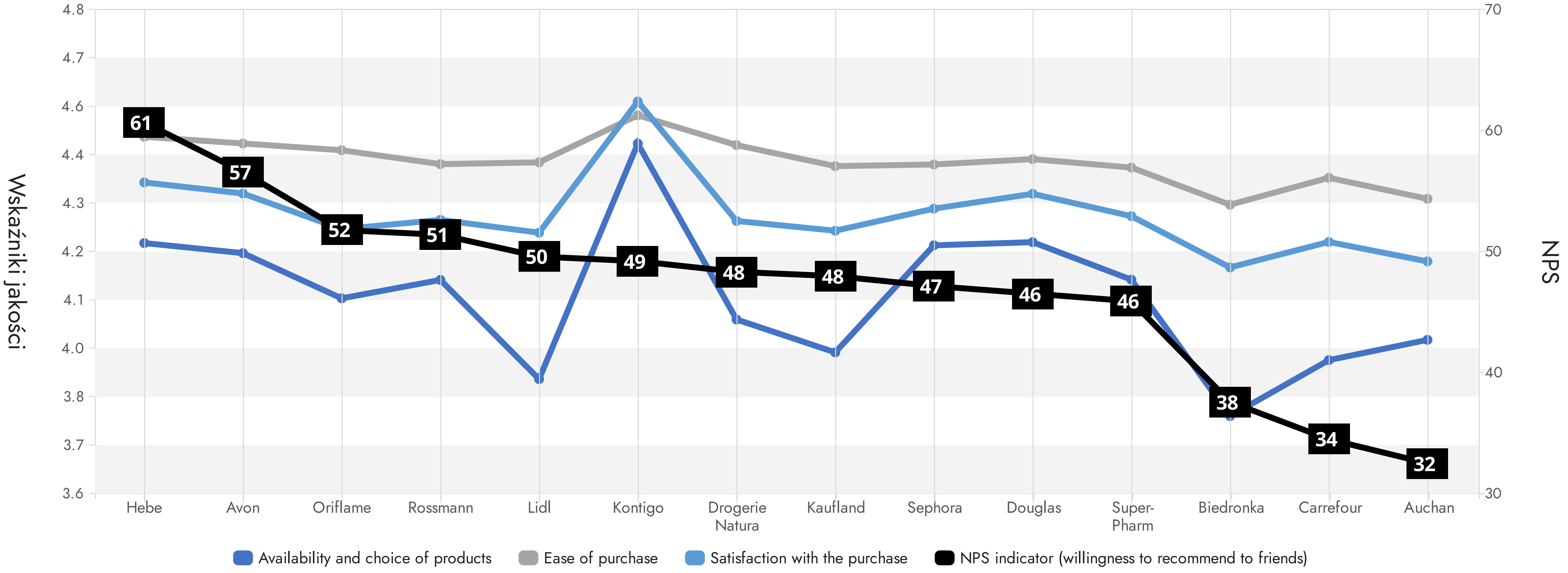
HOW LIKELY ARE YOU TO RECOMMEND THESE SHOPS TO YOUR FRIENDS?

Comparison of the NPS index values with last year's edition of the survey



TRADITIONAL CHANNEL - QUALITY ASSESSMENT OF EXPERIENCE

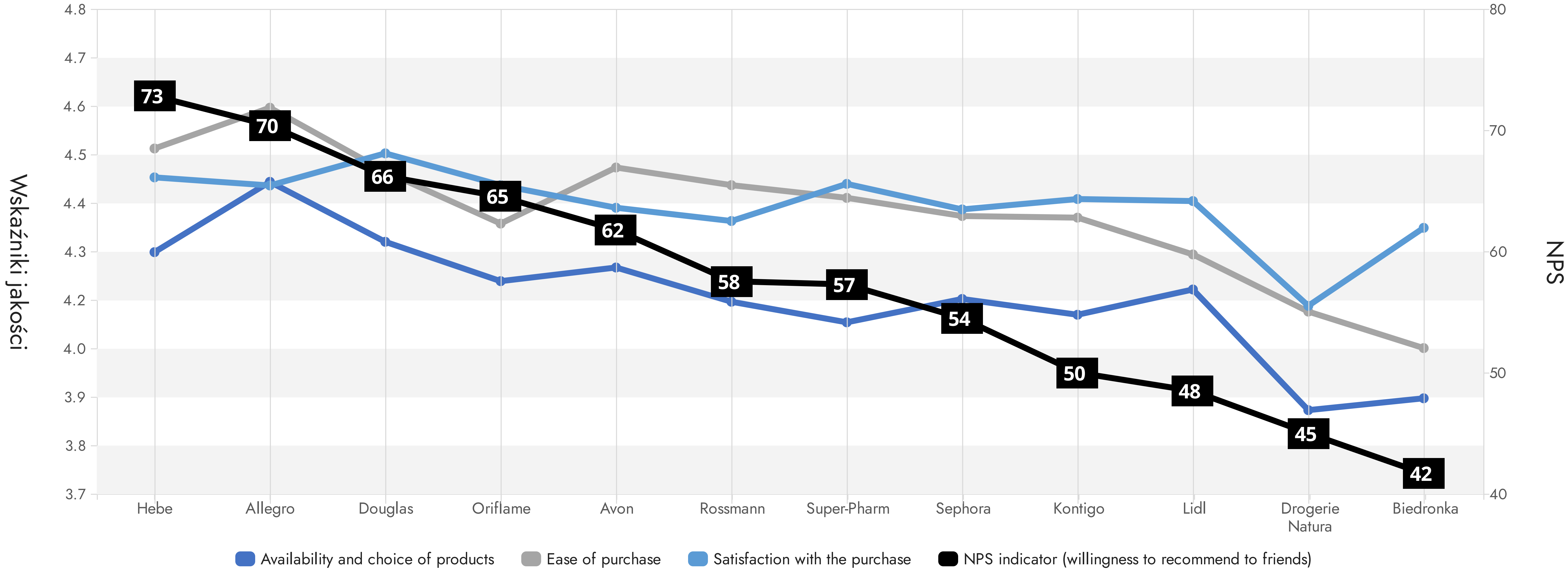
Quality ratings on a scale from 1 to 5 and NPS on a scale from -100 to 100



Lidl and Biedronka have the smallest selection, while Biedronka, according to the respondents, has the lowest overall satisfaction. The highest NPS index is recorded for Hebe and Avon. The best availability, ease of purchase and the highest overall satisfaction with the purchase were recorded for Kontigo.

INTERNET CHANNEL - QUALITY ASSESSMENT OF EXPERIENCES

Quality ratings on a scale from 1 to 5 and NPS on a scale from -100 to 100



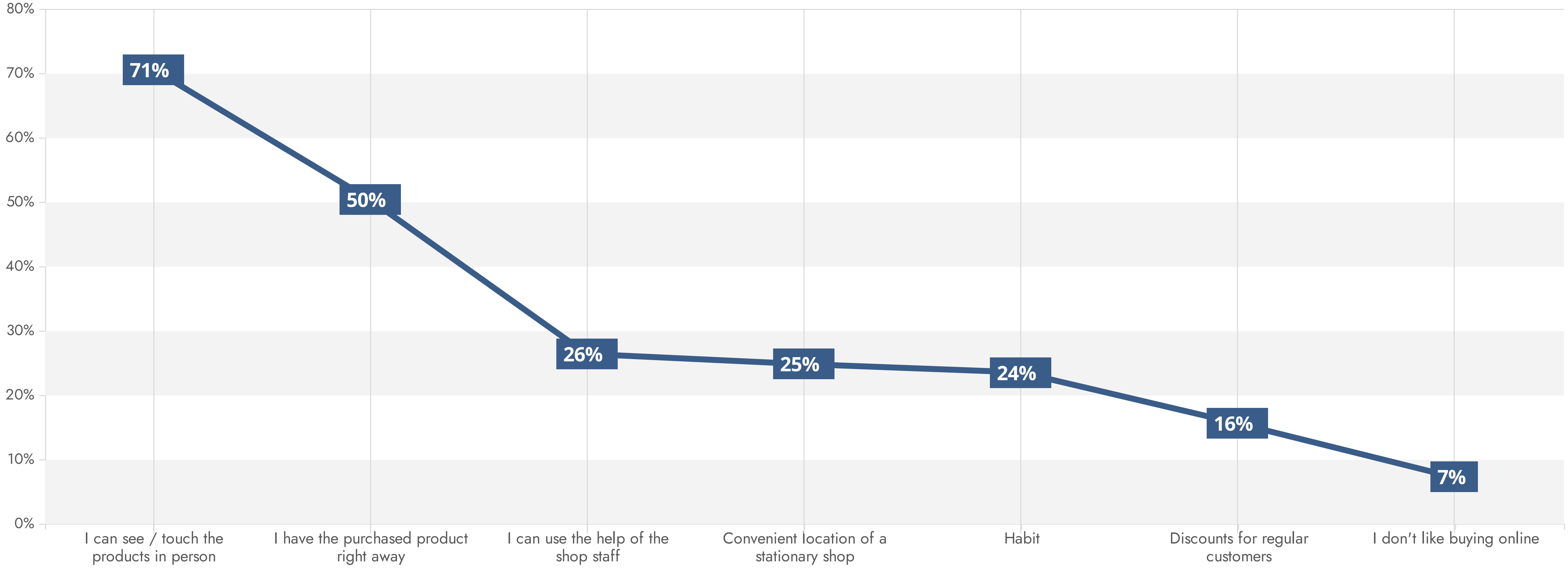
Analysing individual aspects of the experience against the NPS indicator, we observe the strength of the Hebe and Allegro brands, where high ratings for ease of purchase are also correlated with high probability of recommending the brand to friends.

SHOPPING PREFERENCES IN THE STATIONARY CHANNEL

WHY DO YOU PREFER TO BUY COSMETICS, PERFUMES OR HYGIENE PRODUCTS IN A STATIONARY SHOP?

Traditional channel - Multiple choice question

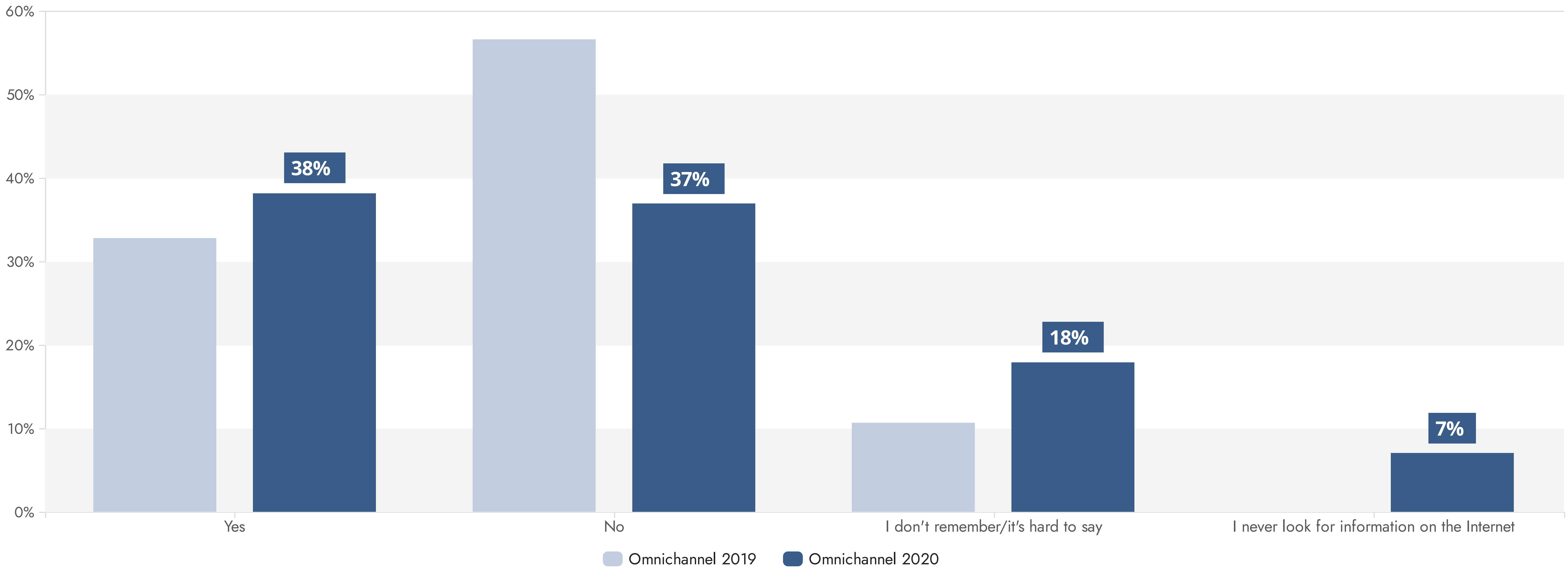
n = 2983



BEFORE THE LAST PURCHASE OF COSMETICS, PERFUMES OR HYGIENE PRODUCTS IN A STATIONARY SHOP, DID YOU LOOK FOR INFORMATION ON THE INTERNET?

Traditional channel - Multiple choice question

n = 4341

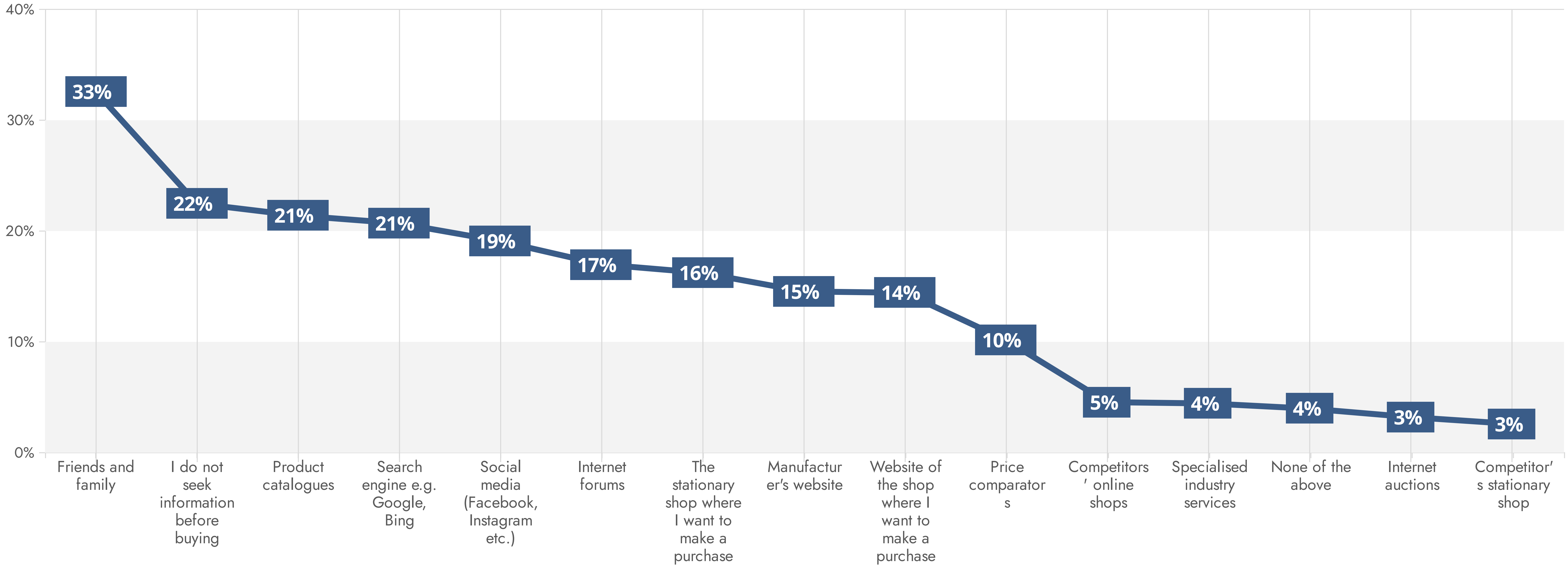


We can clearly see an increase in the proportion of people who, before making a purchase, look online to obtain product information, opinions or comparisons with others.

FROM WHERE DO YOU OBTAIN INFORMATION ABOUT COSMETICS, PERFUMES OR HYGIENE PRODUCTS BEFORE PURCHASE?

Traditional channel - Multiple choice question

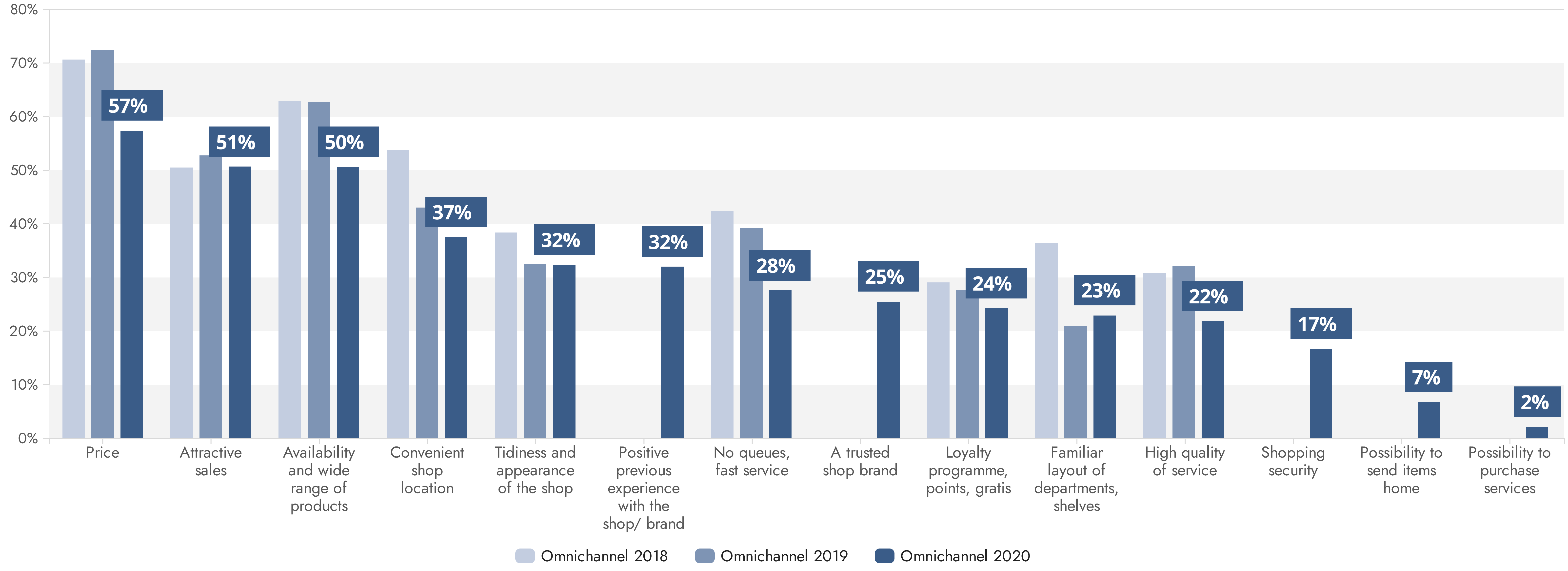
n = 4295



WHAT IS MOST IMPORTANT TO YOU WHEN SHOPPING FOR COSMETICS, PERFUMES OR HYGIENE PRODUCTS IN A STATIONARY SHOP?

Traditional channel - Multiple choice question

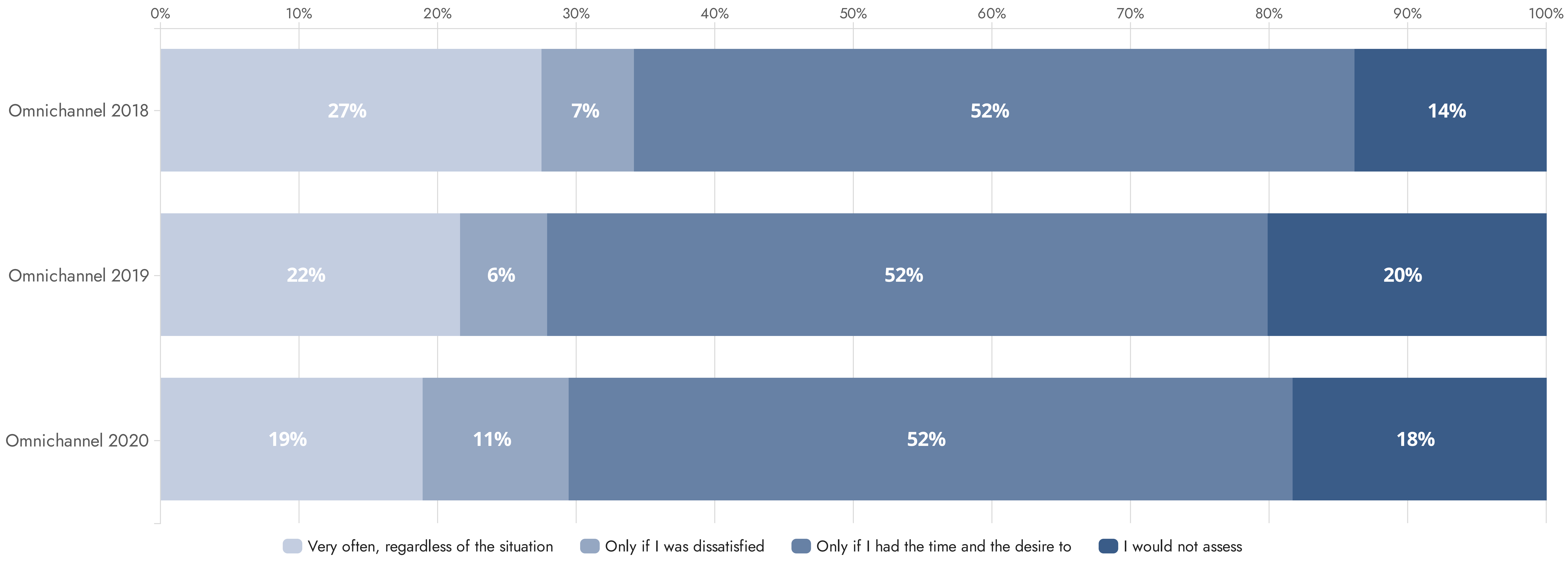
n = 3501



IF IT WERE POSSIBLE, WOULD YOU EVALUATE YOUR VISIT TO THE STATIONARY SHOP BY SURVEYS OR EVALUATION SCREENS?

Traditional channel - Single choice question

n = 3840

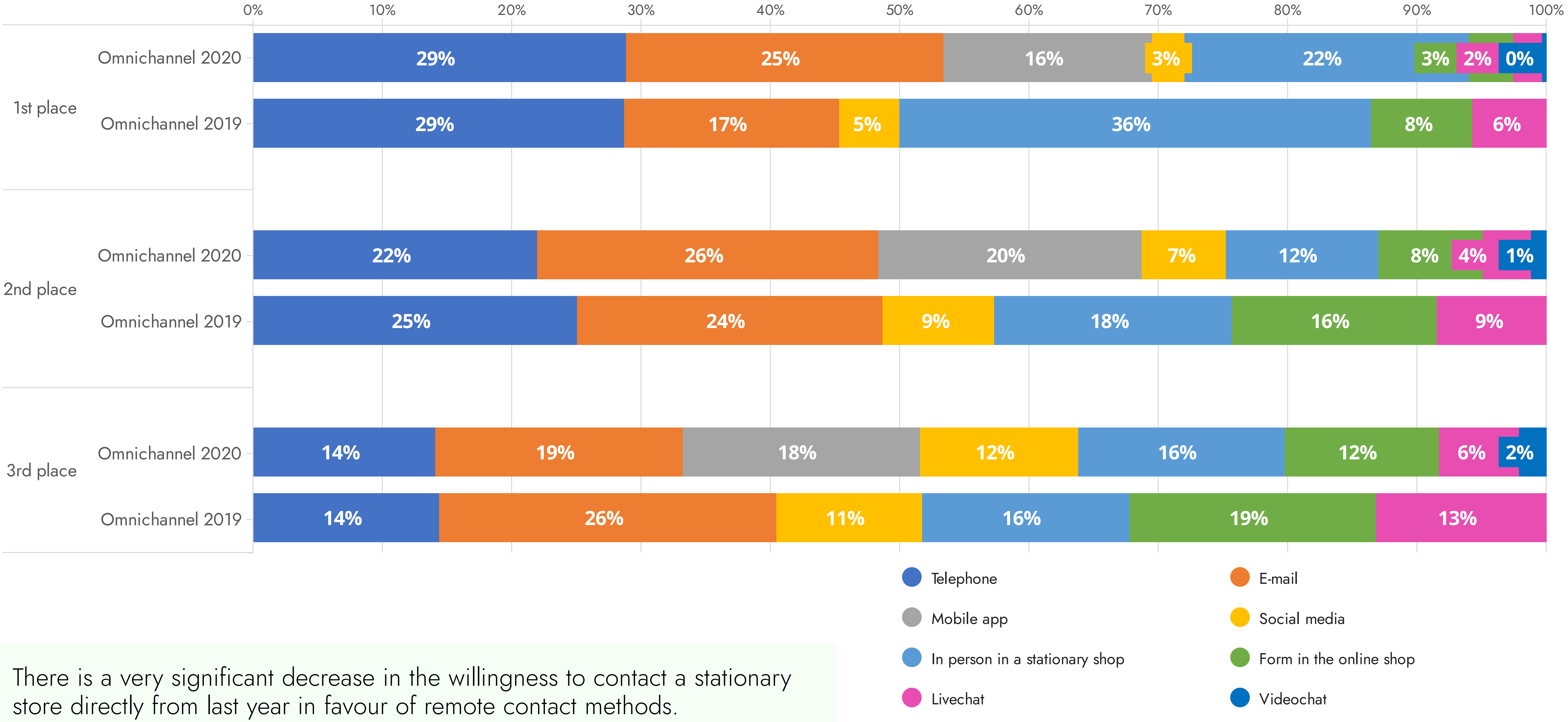


Only 18% of respondents say a strong 'No' to sharing their opinions and shopping experiences, which means that many people want to pass on their insights to others, but do not always have the opportunity to do so.

IF IT WAS NECESSARY, HOW WOULD YOU LIKE TO CONTACT THE STATIONARY STORE AFTER THE PURCHASE?

Traditional channel - Ranking question. The distribution of first and second choice contact methods is presented

n = 3377



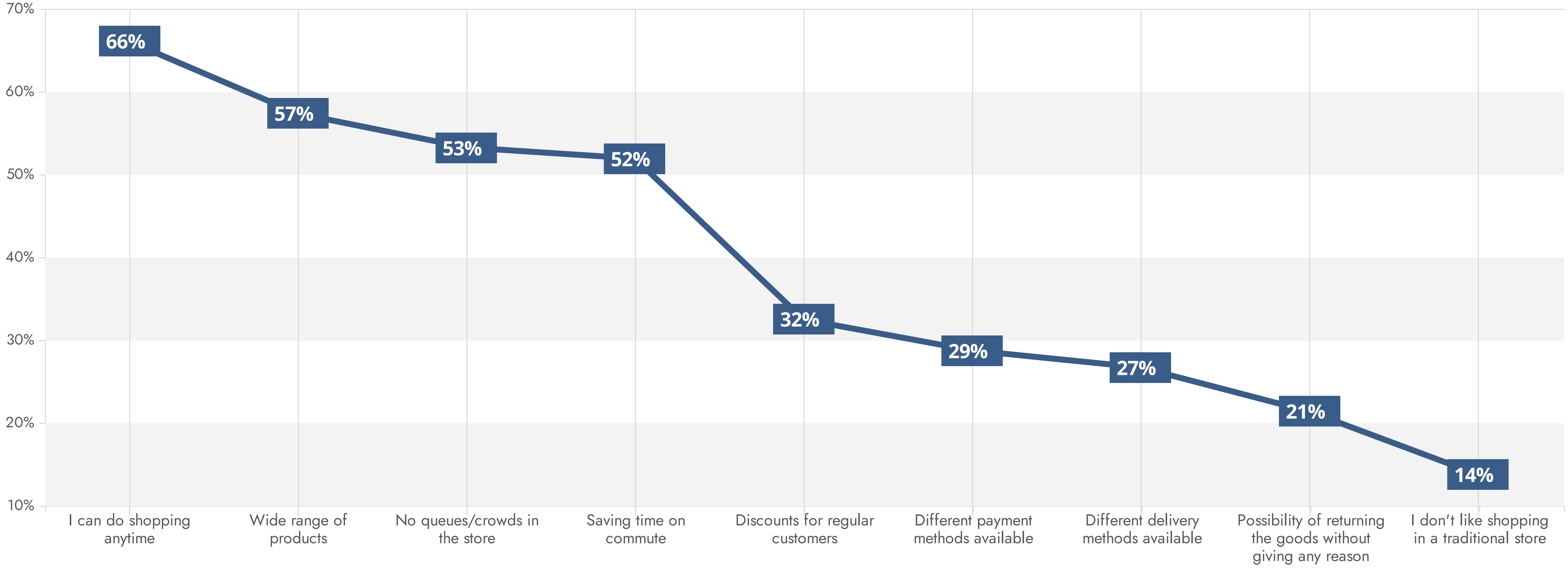
There is a very significant decrease in the willingness to contact a stationary store directly from last year in favour of remote contact methods.

SHOPPING PREFERENCES ON THE INTERNET CHANNEL

WHY DO YOU PREFER TO BUY COSMETICS, PERFUMES OR HYGIENE PRODUCTS IN AN ONLINE SHOP?

Internet channel - Multiple choice question

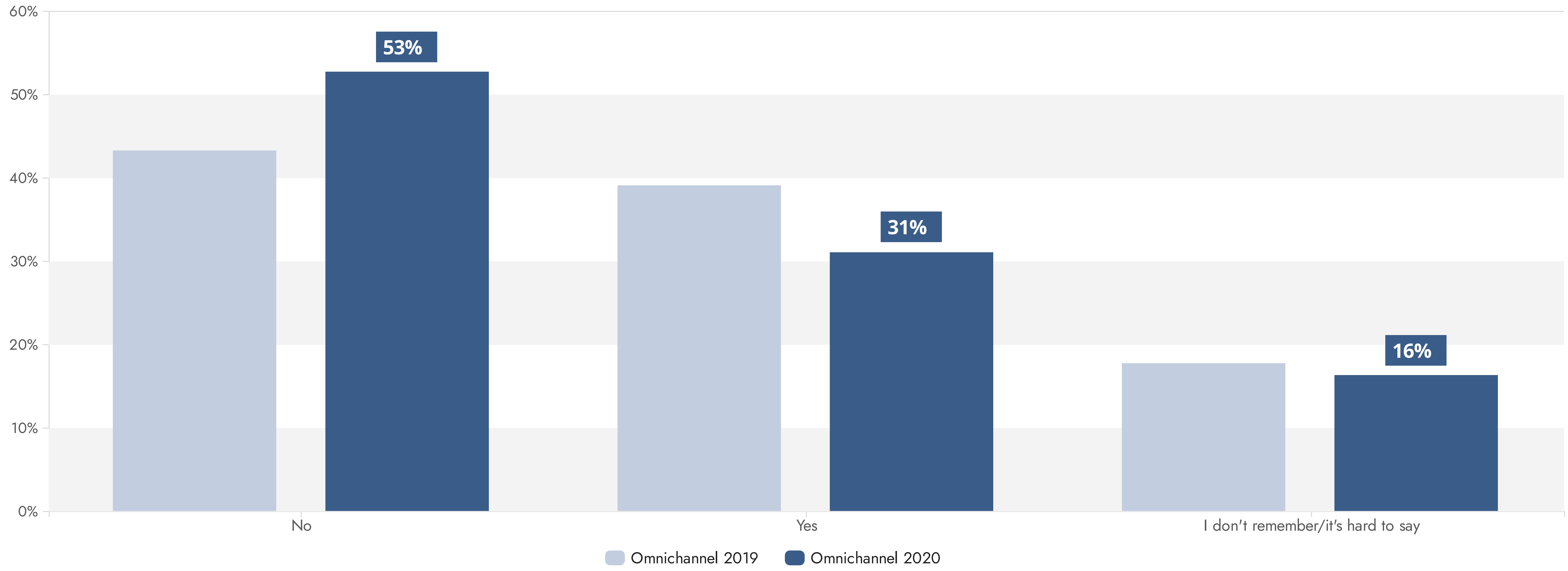
n = 828



BEFORE THE LAST PURCHASE OF COSMETICS, PERFUMES OR HYGIENE PRODUCTS IN AN ONLINE SHOP, DID YOU VISIT THE STATIONARY SHOPS TO GET ACQUAINTED WITH THE PRODUCT?

Internet channel - Multiple choice question

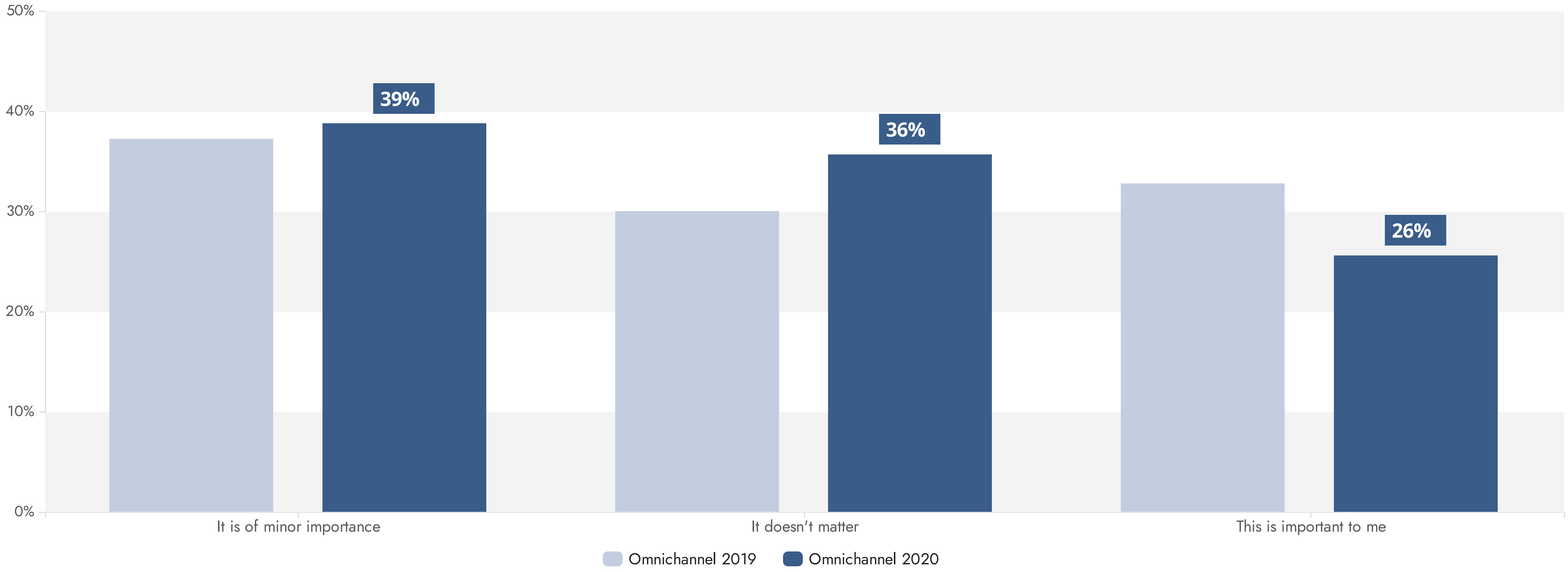
n = 780



WHEN PLANNING ONLINE SHOPPING, DO YOU TAKE INTO CONSIDERATION THE PRESENCE OF A STATIONARY SHOP OF THE BRAND IN YOUR AREA?

Internet channel - Multiple choice question

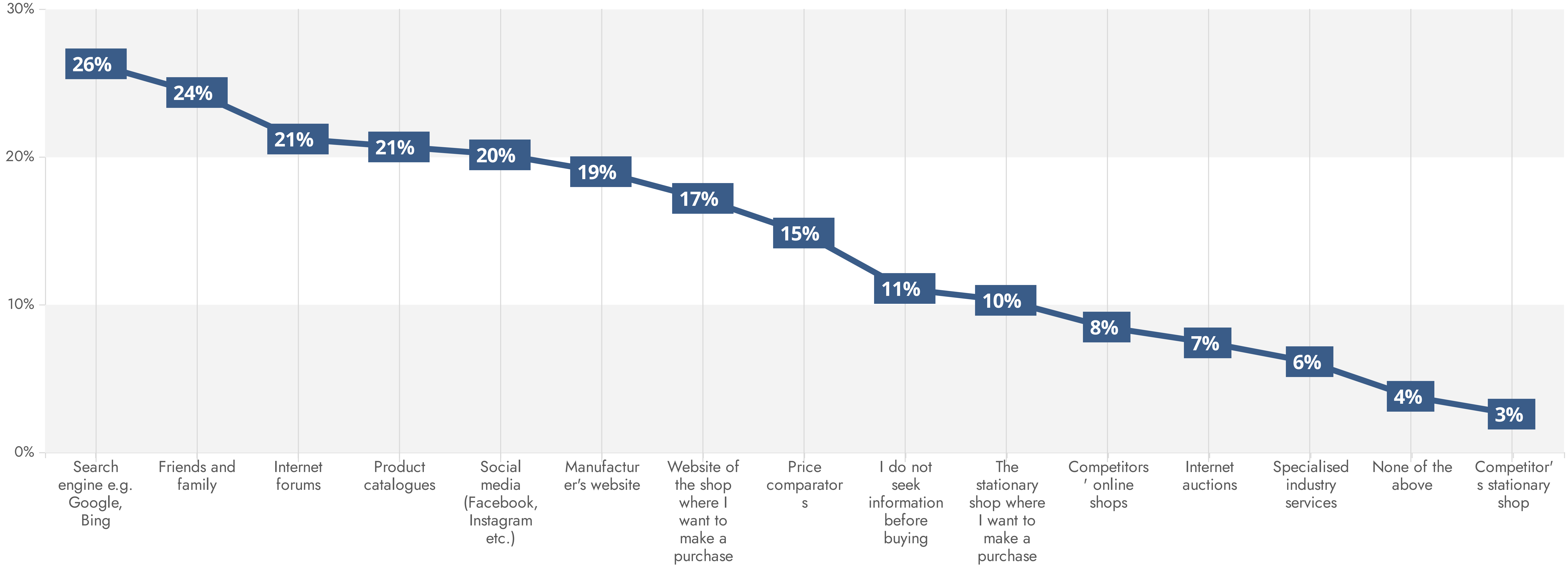
n = 743



FROM WHERE DO YOU OBTAIN INFORMATION ABOUT COSMETICS, PERFUMES OR HYGIENE PRODUCTS BEFORE PURCHASE?

Internet channel - Multiple choice question

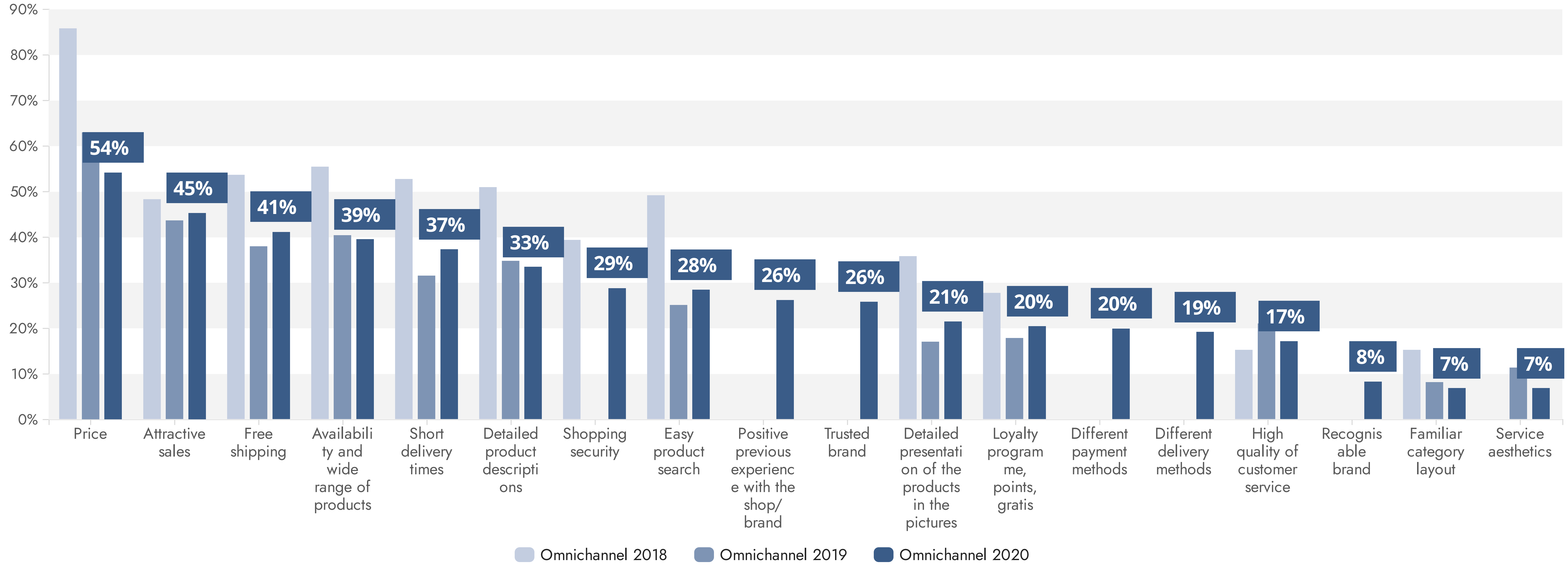
n = 769



WHAT IS THE MOST IMPORTANT THING FOR YOU WHEN SHOPPING FOR COSMETICS, PERFUMES OR HYGIENE PRODUCTS ONLINE?

Internet channel - Multiple choice question

n = 575

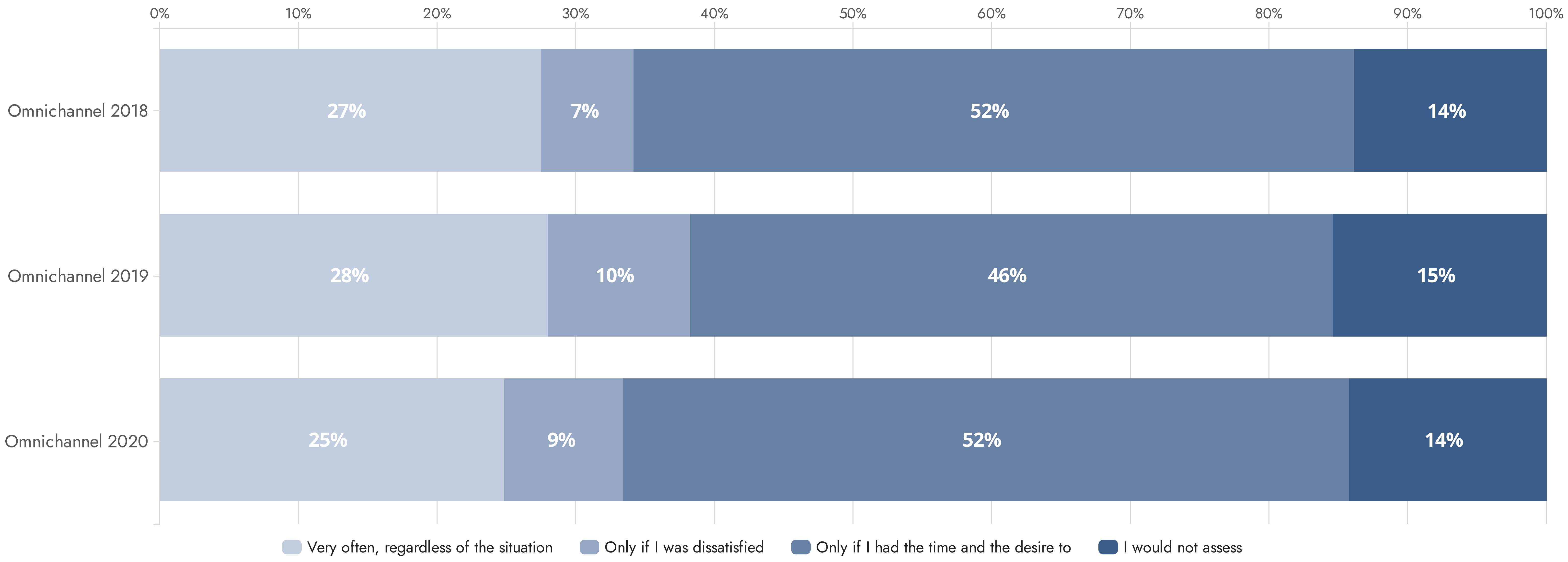


The price of a product ceases to be so important for the customer from year to year, all accompanying circumstances, the cost of delivery or lack of delivery, the time of order completion or the way the product/service is presented are becoming more and more important.

IF IT WERE POSSIBLE, WOULD YOU EVALUATE YOUR VISIT WITH THE ONLINE SHOP BY MEANS OF SURVEYS?

Internet channel - Single-choice question

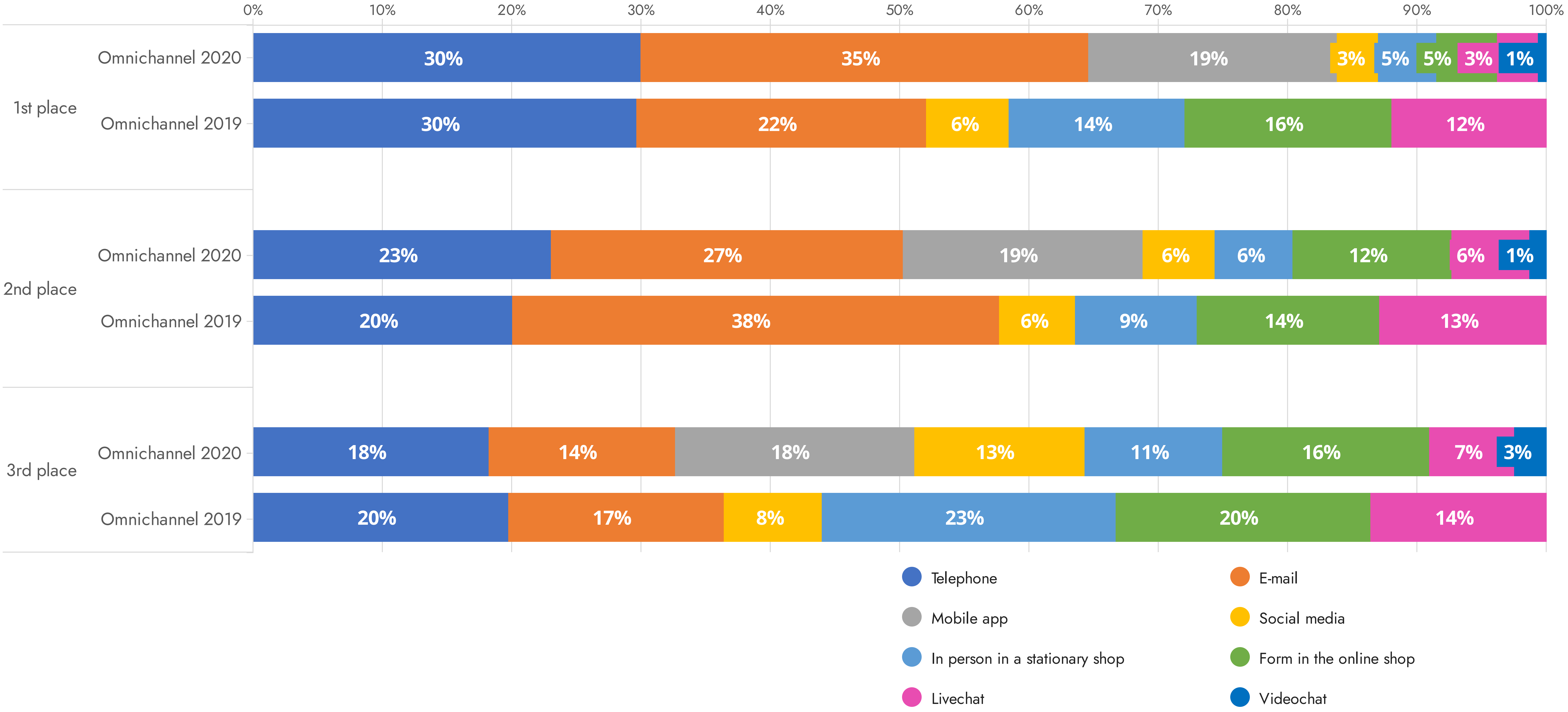
n = 3840



IF IT WAS NECESSARY, HOW WOULD YOU LIKE TO CONTACT THE ONLINE STORE AFTER THE PURCHASE?

Internet channel - Ranking question. The distribution of first and second choice contact methods is presented

n = 598

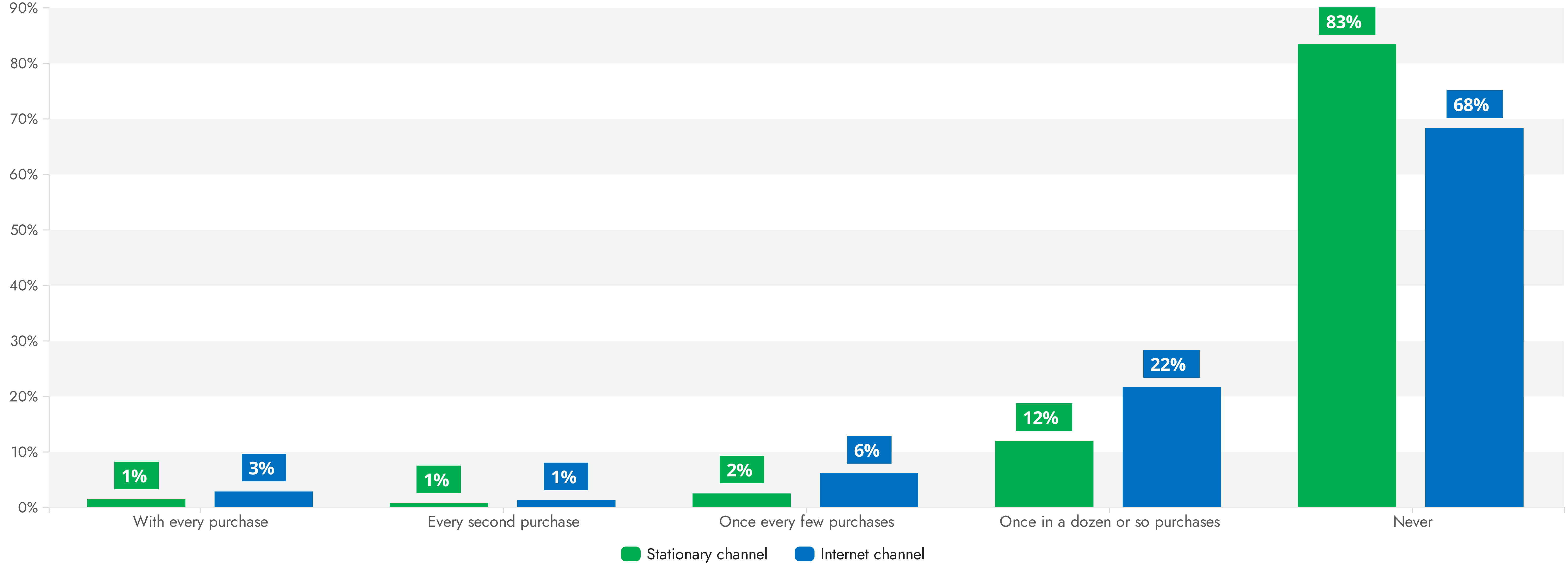


POST-PURCHASE EXPERIENCE

HOW OFTEN DO YOU RETURN COSMETICS, PERFUME OR HYGIENE PRODUCTS (COMPLAINT/ RETURN/ EXCHANGE)?

Single-choice question

n = 4095

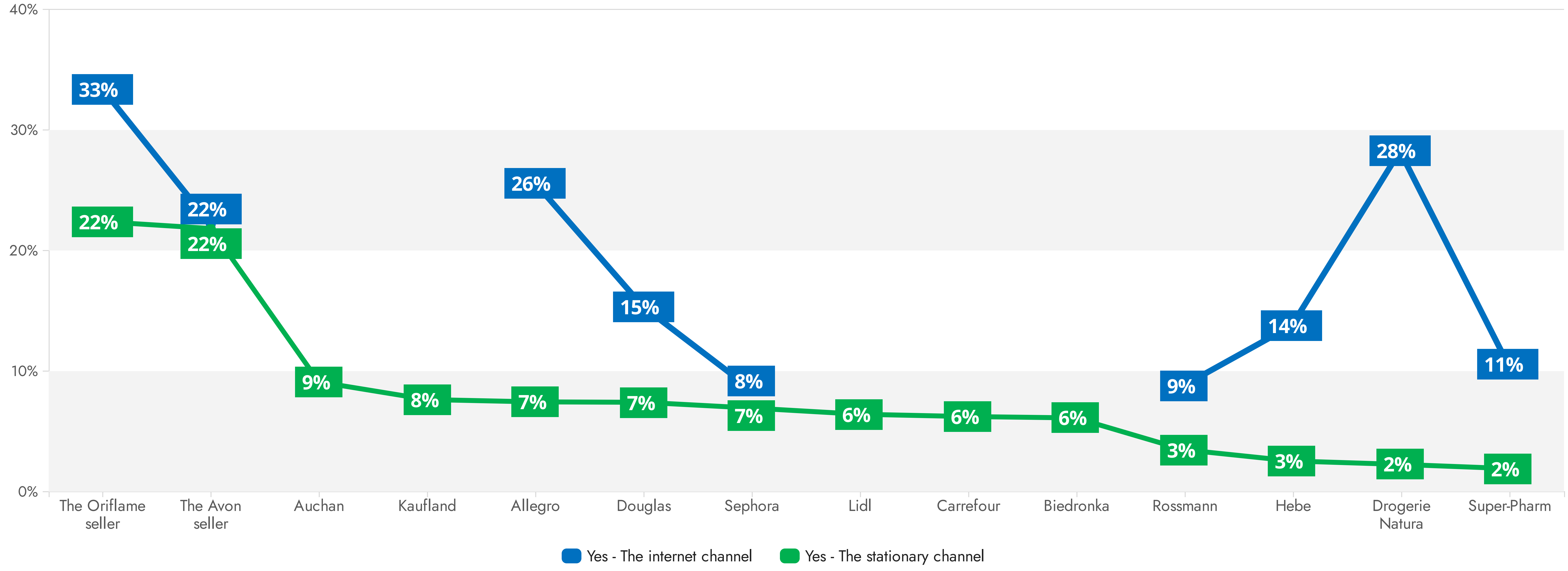


We already know that the e-commerce segment is growing in strength, but it should be noted that the share of returns of purchased products in this channel is much higher than in the case of traditional sales, which in turn is associated with the increased work of after-sales service.

HAVE YOU HAD CONTACT WITH THE CUSTOMER SERVICE DEPARTMENT DURING THE LAST YEAR? - PARTICIPATION OF CONTACT PERSONS

Analysis of customers having contact with Customer Service Departments

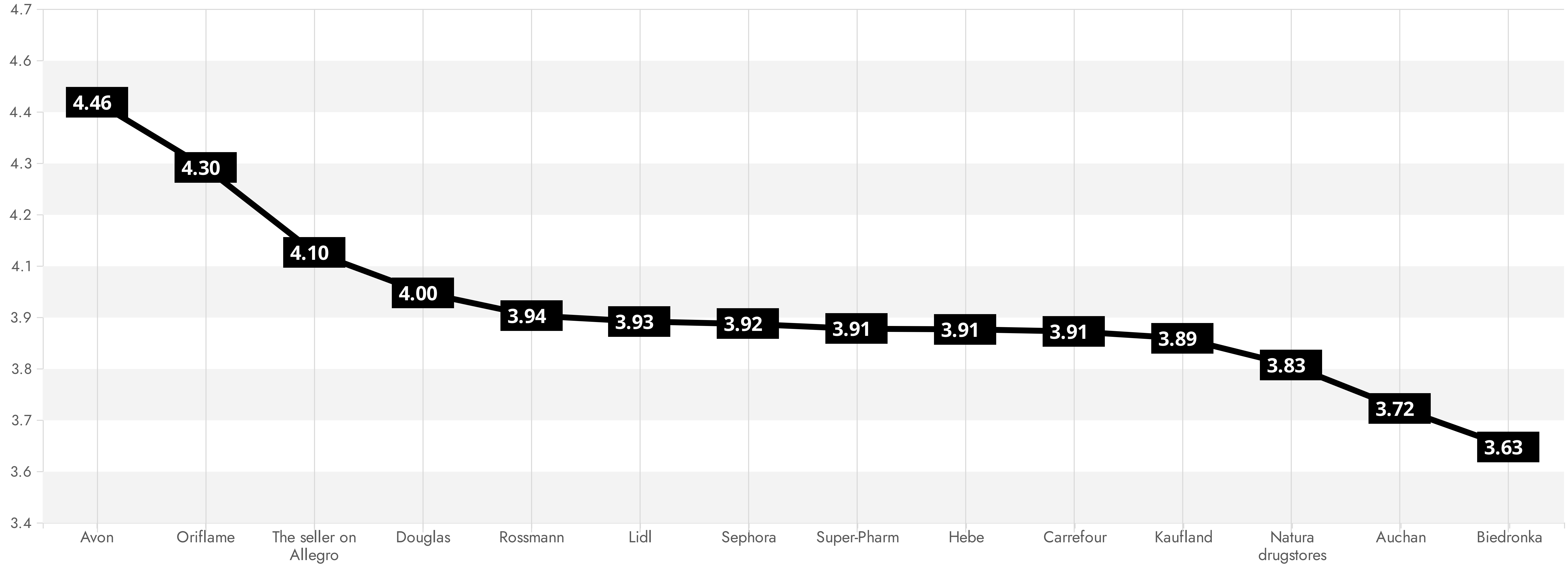
n Internet channel = 1143, n stationary channel = 3448



CONTACT ASSESSMENTS WITH THE CUSTOMER SERVICE DEPARTMENT - CONSULTANT'S COURTESY

Evaluation on a scale of 1 to 5

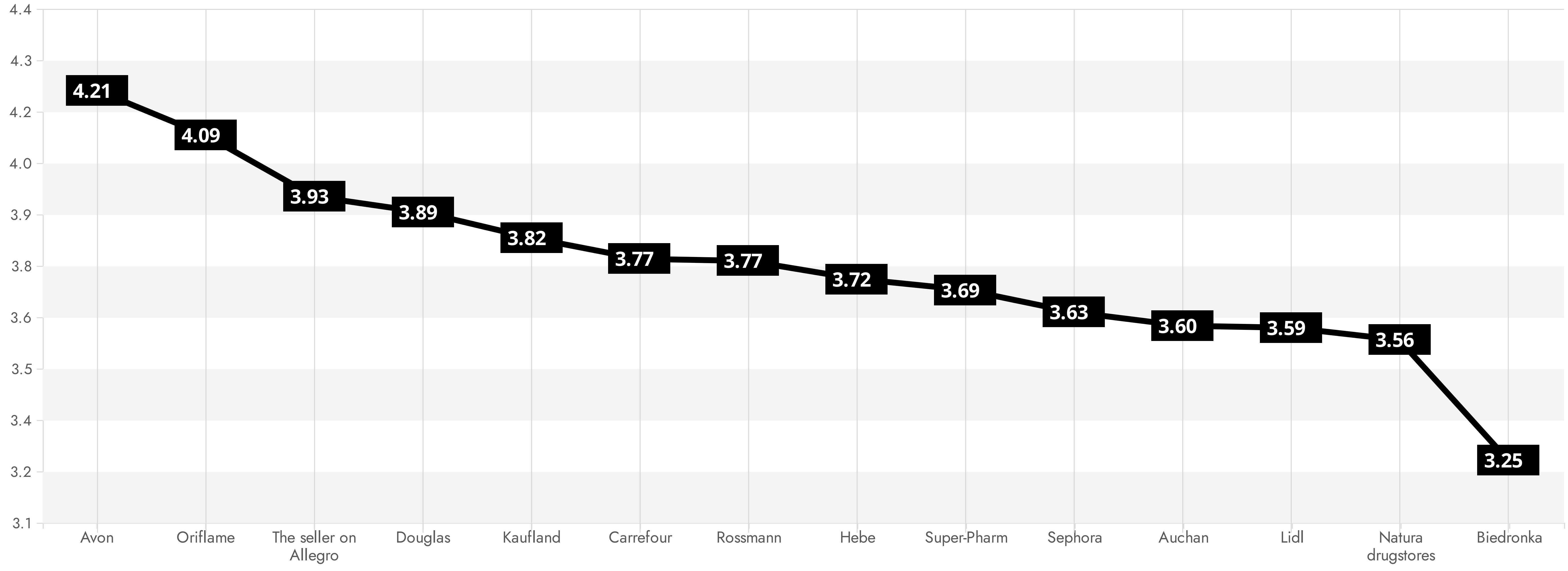
n = 1709



CONTACT ASSESSMENTS WITH THE CUSTOMER SERVICE DEPARTMENT - CALL WAITING TIME

Evaluation on a scale of 1 to 5

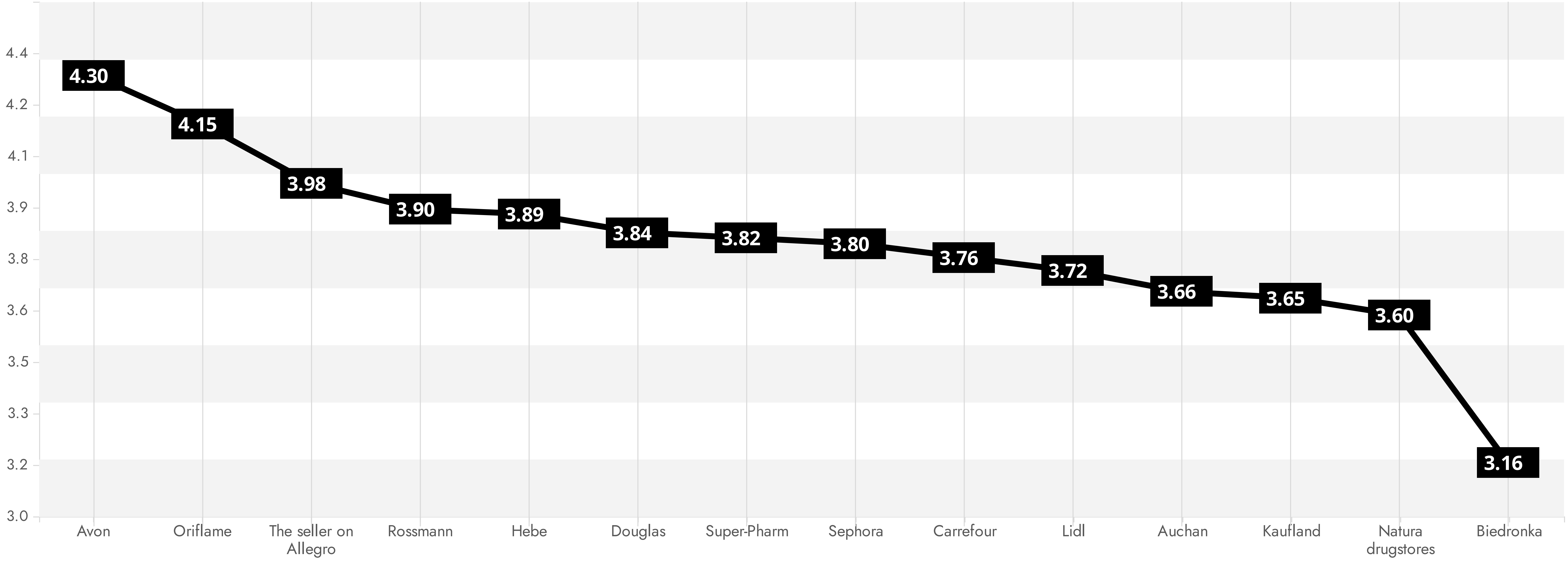
n = 1572



CONTACT ASSESSMENTS WITH CUSTOMER SERVICE DEPARTMENT - SPEED IN SOLVING THE CASE

Evaluation on a scale of 1 to 5

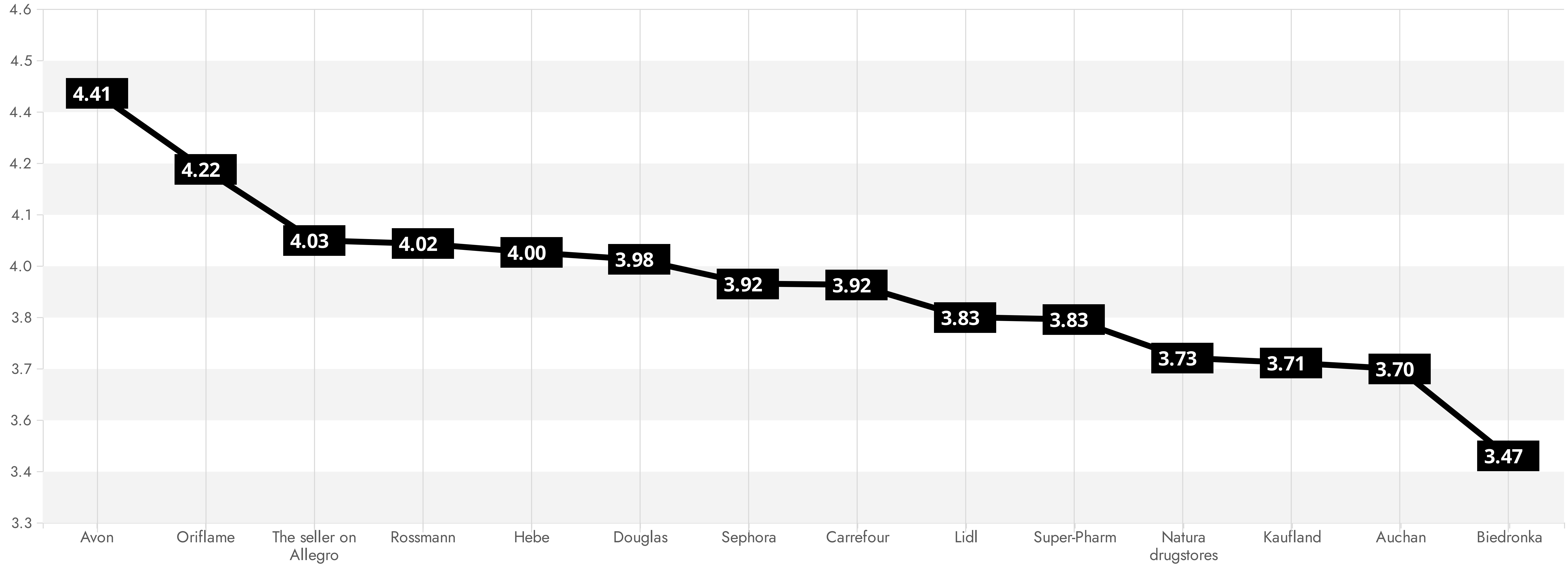
n = 1592



CONTACT ASSESSMENTS WITH THE CUSTOMER SERVICE DEPARTMENT - CONSULTANT'S INVOLVEMENT

Evaluation on a scale of 1 to 5

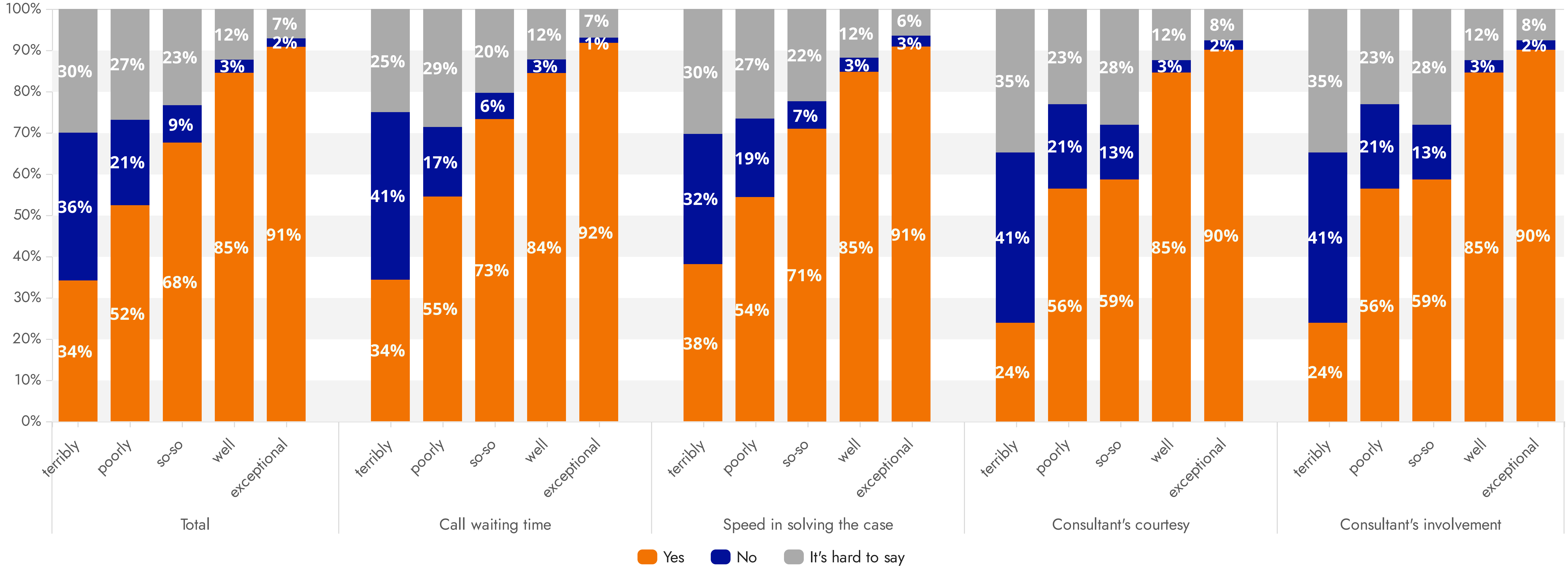
n = 1564



ARE YOU STILL USING OR WILL YOU BE USING THIS BRAND SERVICES? - ACCORDING TO THE ASSESSMENT OF INDIVIDUAL ASPECTS

Single-choice matrix question

n = 1709



Negative assessment of a consultant's involvement has the greatest impact (fatal and poor assessments) on the unwillingness to reuse the offer of a given brand. The strongest influence in the case of a fatal assessment is the time of waiting for a merger and the consultant's courtesy. This means that the most important thing is to be able to quickly connect and talk to a polite consultant and then be able to solve the problem efficiently.

SUMMARY OF THE RESEARCH

08-09 2020

Survey conducted in August and September 2020

170 thousand

The survey was completed by over 170 000 people

8

We have studied eight product segments


Cinemas

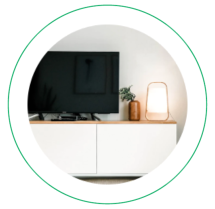

Clothing


Drugstores


Shoes


Telecommunicatic


House and garden


Consumer electronics


Books, multimedia

Further reports will be published on the YourCX

Those interested in additional analyses and research are invited to contact and cooperation!

Piotr Wojnarowicz

p.wojnarowicz@yourcx.io

+48 661 627 620

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