YourCX

REPORT

OMNI CHANNEL 2020

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Due to the current situation (COVID-19), when we 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.

What does it really look like?

The conclusions of the Omnichannel 2019 study have attracted a great deal of interest, and this yearwe 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 - %terribly
intermediate value NPS = NPS / 100
final value = (intermediate value + 1) * 125
final result = Σ final values

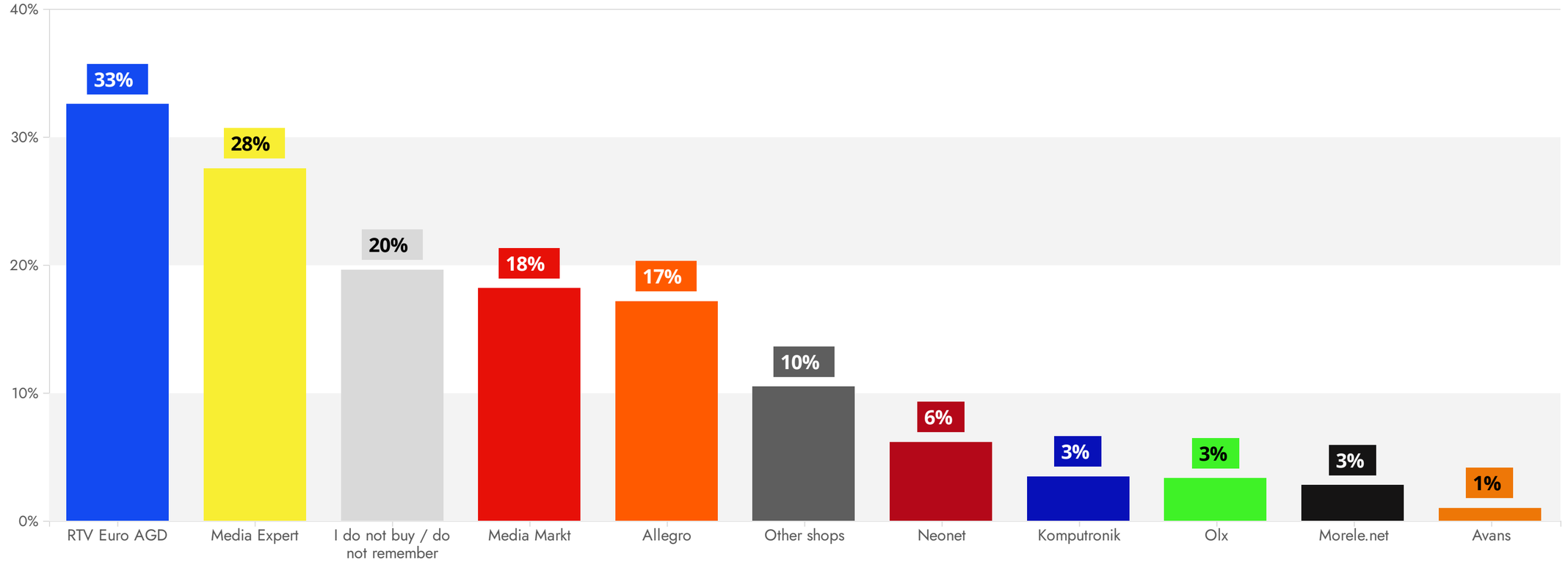
CALCULATION EXAMPLES FOR COMPANY XYZ

	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 ELECTRONICS OR HOUSEHOLD APPLIANCES?

Multiple choice question

n = 6224

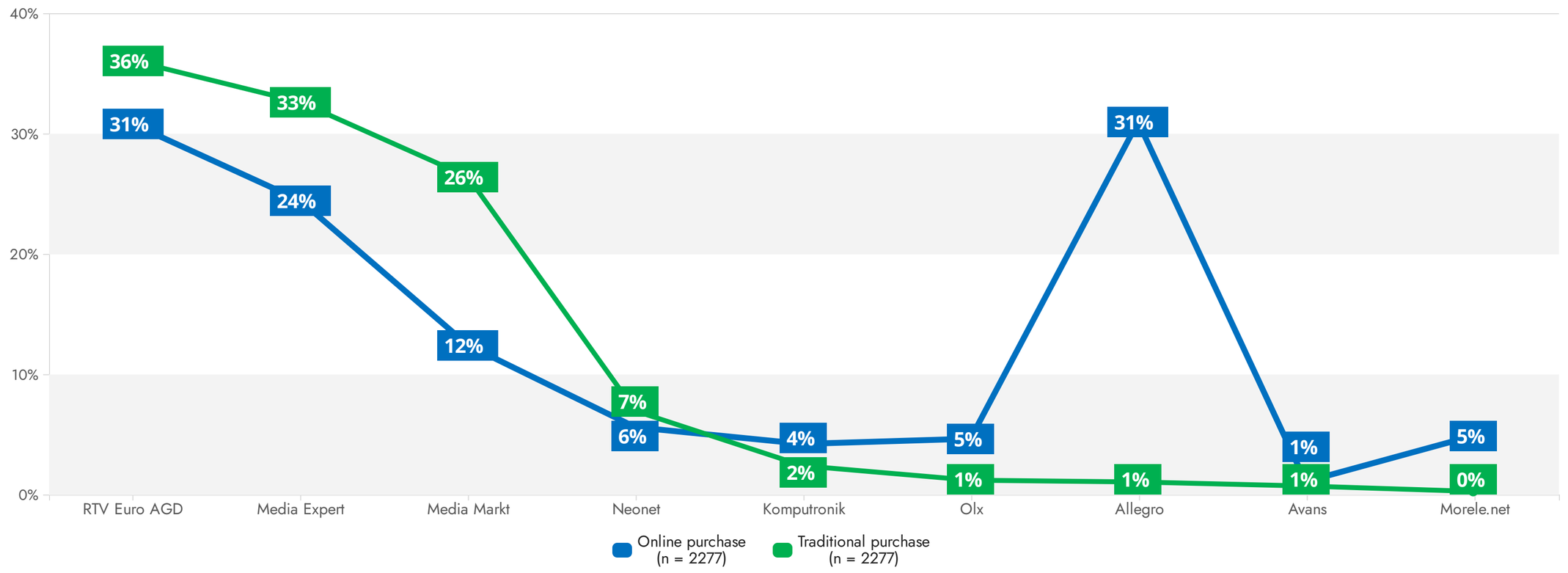


The leaders in the sale of electronic equipment are the RTV Euro AGD, where every third respondent recently made a purchase, and Media Expert. One in five respondents does not buy or remember purchases from this category. Media Markt and Allegro have similar market shares. Subsequent brands did not exceed 10% of respondents' indications. The results are aggregate for all shopping channels (including online and traditional shopping).

WHERE HAVE YOU RECENTLY BOUGHT ELECTRONICS OR HOUSEHOLD APPLIANCES?

Market shares by purchasing channel

n = 2754 online purchase, 2277 stationary purchase

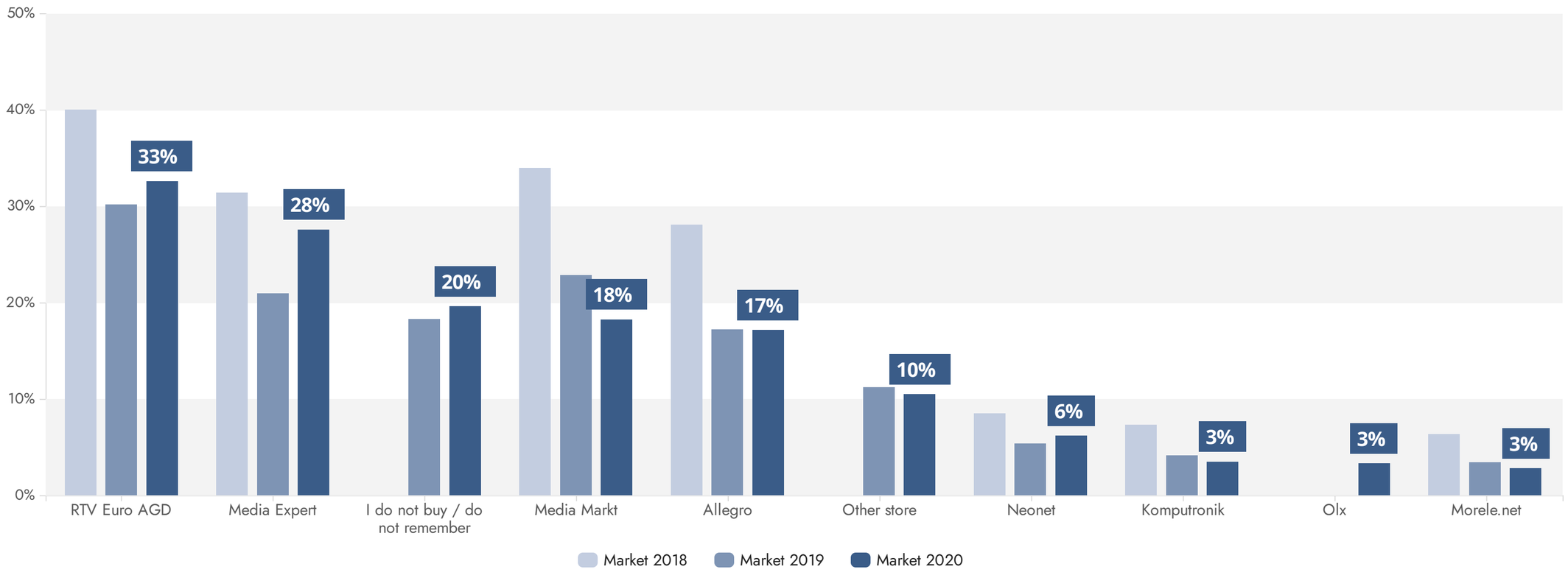


Depending on the shop where the respondents buy electronics and household appliances, their shopping channel preferences vary. In the online channel, the leader are Allegro and RTV Euro AGD, which is a leader in traditional sales.

WHERE HAVE YOU RECENTLY BOUGHT ELECTRONICS OR HOUSEHOLD APPLIANCES?

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

n 2018 = 4988, 2019 = 5859, 2020 = 6224

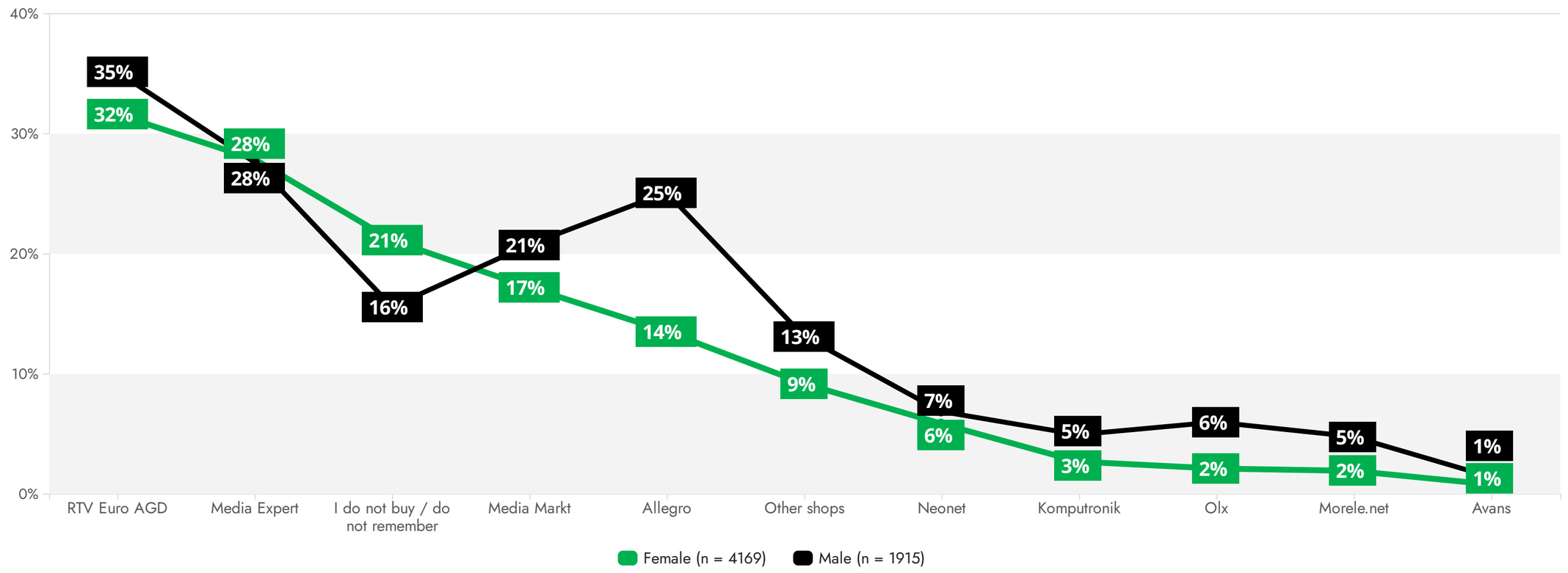


When comparing Omnichannel 2020 results with last year's edition of the survey, we see an increase in the share of purchases in the RTV Euro AGD and Media Expert. Compared to Omnichannel 2018, we see a significant drop in the Media Markt and Komputronik ratings.

WHERE HAVE YOU RECENTLY BOUGHT ELECTRONICS OR HOUSEHOLD APPLIANCES?

Analysis by gender

n = 6084

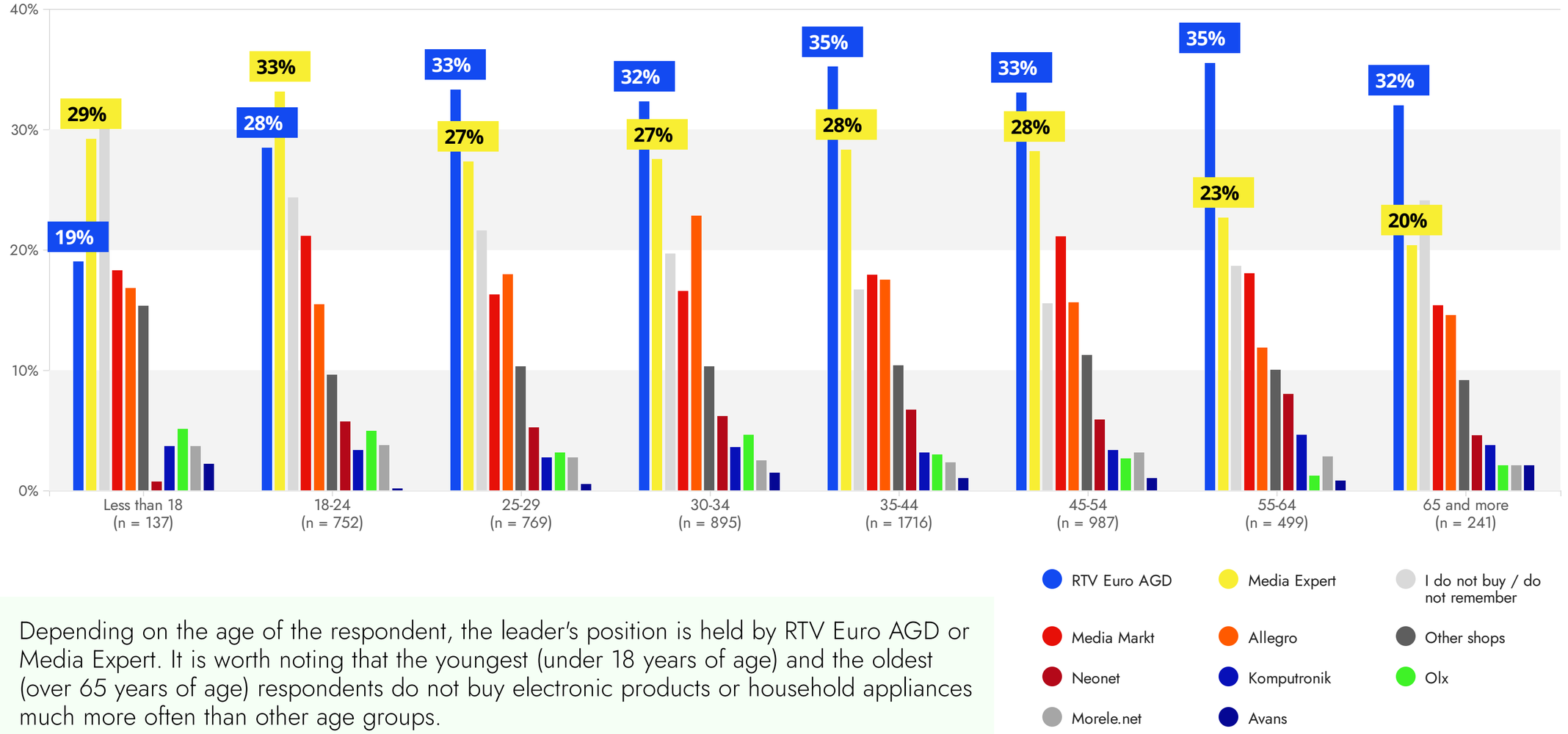


Men are more likely to buy this type of products than women, however, regardless of gender, in order to purchase, we usually go to the RTV Euro AGD or Media Expert. Men more often than women choose to buy in Allegro service and women more often do not buy or do not remember to buy electronic equipment.

WHERE HAVE YOU RECENTLY BOUGHT ELECTRONICS OR HOUSEHOLD APPLIANCES?

Analysis by age

n = 5996

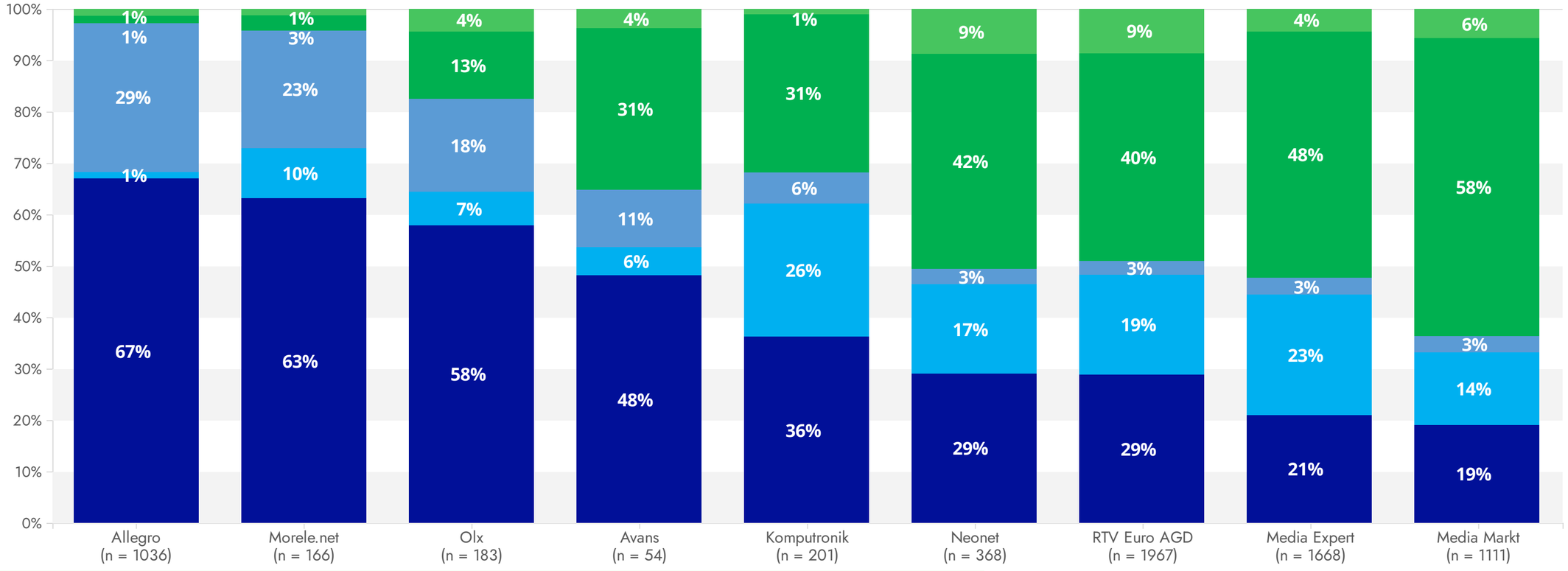


Depending on the age of the respondent, the leader's position is held by RTV Euro AGD or Media Expert. It is worth noting that the youngest (under 18 years of age) and the oldest (over 65 years of age) respondents do not buy electronic products or household appliances much more often than other age groups.

HOW DID YOU BUY THE PRODUCTS THERE?

Selected purchase channel - single-choice question

n = 4495



Depending on the shop where the purchase is made, respondents prefer different purchase methods. In the online channel, in addition to purchases with home delivery, the method of collecting online orders at the point of delivery and the brand's stationary store is very popular, which is particularly noticeable in the case of Komputronik or Media Expert.

- 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

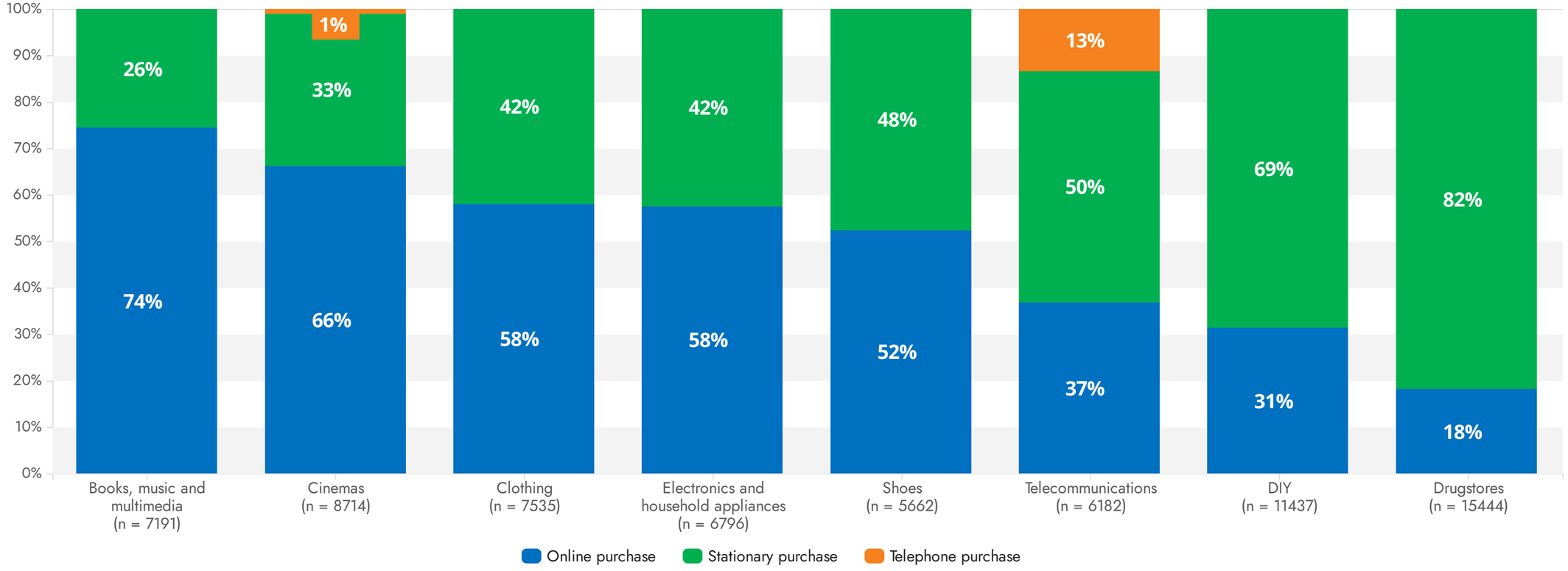
HOW DID YOU BUY THE PRODUCTS THERE?

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
RTV Euro AGD	28.9% +10.3pp	19.4% -3.2pp	2.6% +1pp	40.5% -9.2pp	8.6% +1.2pp	1967
Media Expert	21% +8.1pp	23.4% -0.3pp	3.2% +0.8pp	48% -7.5pp	4.4% -1.1pp	1668
Media Markt	19.1% +6.2pp	14.1% +0.1pp	3.2% +1.7pp	58% -7.3pp	5.7% -0.6pp	1111
Allegro	67.1% -2pp	1.3% -0.6pp	29% +4.2pp	1.4% -1.7pp	1.3% +0.2pp	1036
Neonet	29.1% +7.2pp	17.4% +4.9pp	3% +0.8pp	41.8% -14.5pp	8.7% +1.5pp	368
Komputronik	36.3% +12.4pp	25.9% -13.6pp	6% +2.1pp	30.8% +1pp	1% -1.9pp	201
Morele.net	63.3% +7.1pp	9.6% -20pp	22.9% +13.4pp	3%	1.2% -0.6pp	166
Avans	48.1% +0.9pp	5.6% -7.6pp	11.1% +7.3pp	31.5% +3.2pp	3.7% -3.8pp	54

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

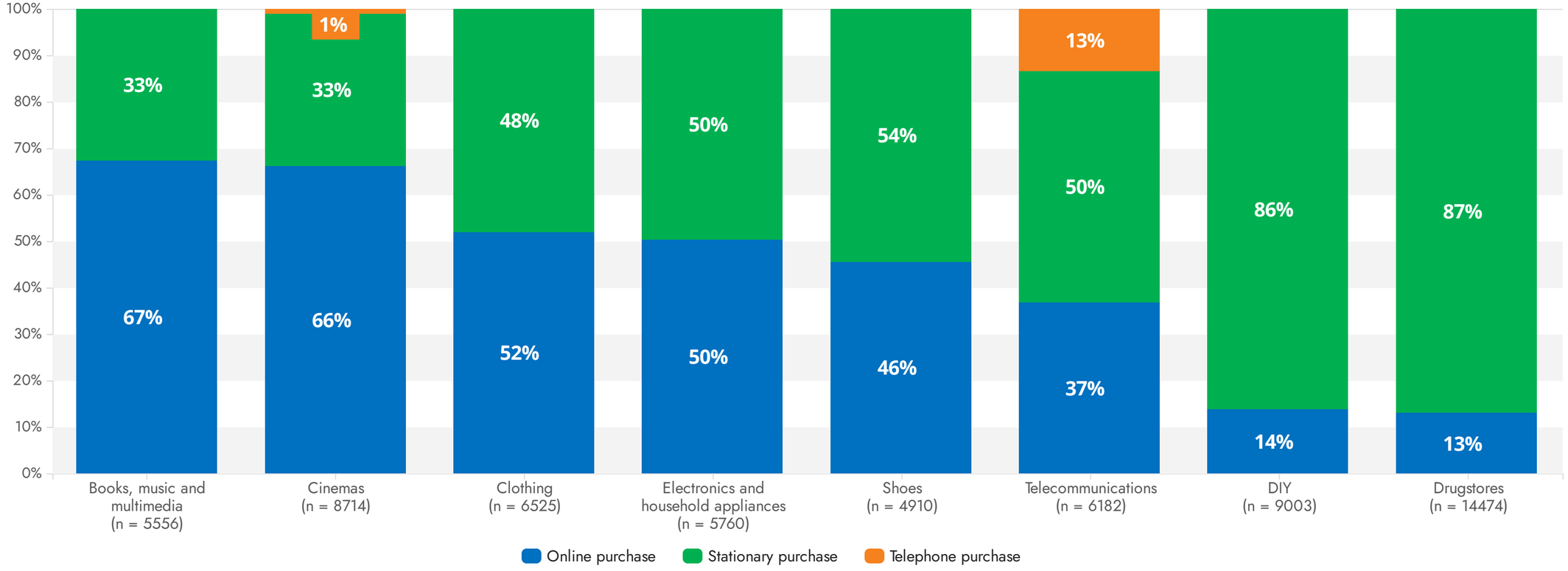
Comparison of selected channels between industries



Comparing the methods of purchasing electronic equipment and household appliances with the industries surveyed within Omnichannel 2020, it can be seen that both the Internet sales channel and an extensive fixed-line sales network are important for the respondents, with a slight indication of the first method.

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

Comparison of selected channels between industries



The differences in the share of online purchases in the above analysis compared to the previous page show how strong Allegro is on the Polish market, without which the share of online and traditional sales in the electronics and household appliances industry is equal.

EXPERIENCE QUALITY INDICATORS

The electronics and household appliances industry is growing in strength, with a year-on-year increase in the share of purchases in this category. This is probably related to the global trend, in which instead of repairing electronic equipment we buy new ones. We are witnessing a global deluge of new brands of equipment which, in order to stand out with their products, play with both price and quality. This has in a way increased the availability of these types of articles and has definitely influenced their prices. The shops in which we make purchases in addition to strong brand image tempt consumers with attractive promotions.

Interestingly, the share of online and offline purchases is similar in this industry. This poses a considerable challenge for companies which, in addition to excellent service in stationary facilities, should devote a lot of attention to their online shops, where, in addition to price issues, the shopping experience is important (speed of delivery, accurate product descriptions, wide choice). Depending on the chosen chain of shops, sales channels intermingle and consumers increasingly buy goods online to pick them up at a fixed location. It is difficult to clearly indicate which sales channel is predominant.

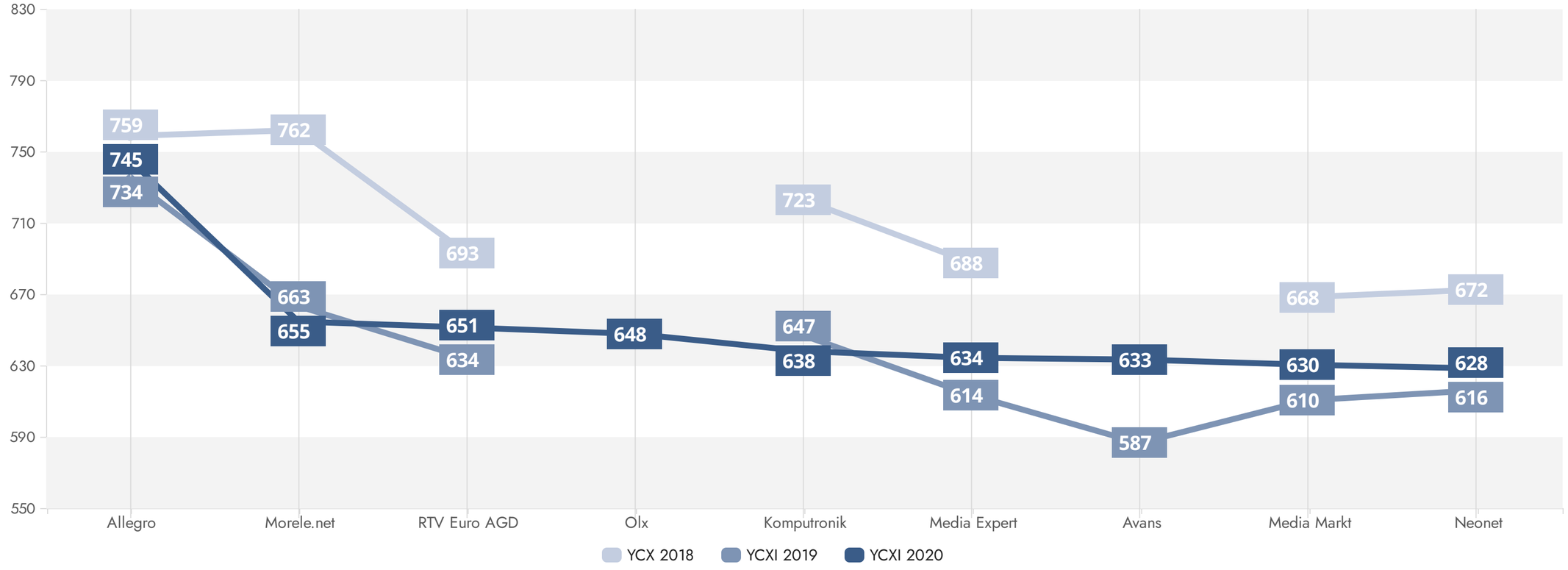
According to the report, consumers most often choose to buy from RTV Euro AGD and Media Expert. It is worth noting that these shops are to a large extent fighting among themselves using various types of discounts and combined promotions, and their network of stationary shops is extremely extensive. However, the highest ratings for shopping experience are given to brands such as Allegro and Morele.net.

The Omnichannel 2020 report prepared by YourCX hides many industry insights, so I can't help but recommend that you read it and draw conclusions. The market is so dynamic that the price, which is still the dominant factor in the buying decision, equals its position with other buying experiences, which you have to be aware of in order to become or remain a leader in the category of consumer electronics and household appliances.

Destina Sławińska
Growify

YOUR CUSTOMER EXPERIENCE INDEX

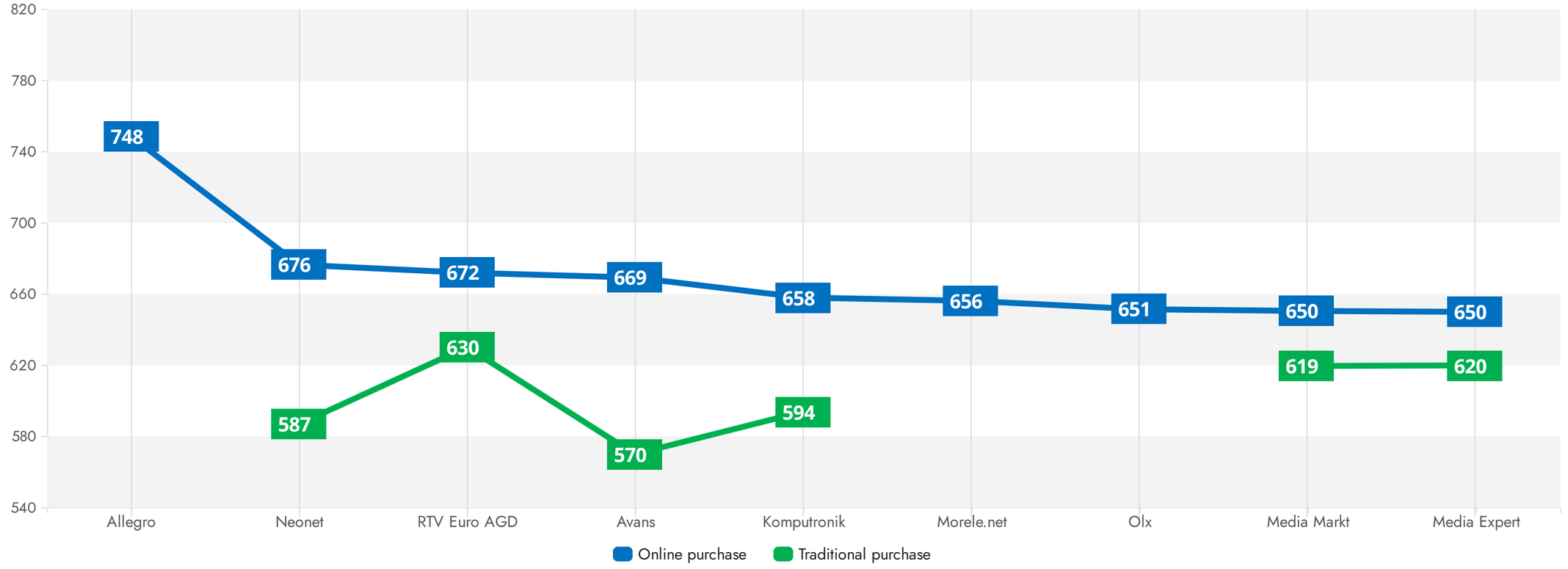
Quality indicator on a scale from 0 to 1000 taking into account four satisfaction factors:
availability and choice of products, ease of order placement, satisfaction with the purchase, willingness to recommend the store to friends



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 potentially a lot to do if only one company has scored around three-quarters of the possible points. The industry leaders are Allegro, Morele.net and RTV Euro AGD. Brand ratings have varied over the years.

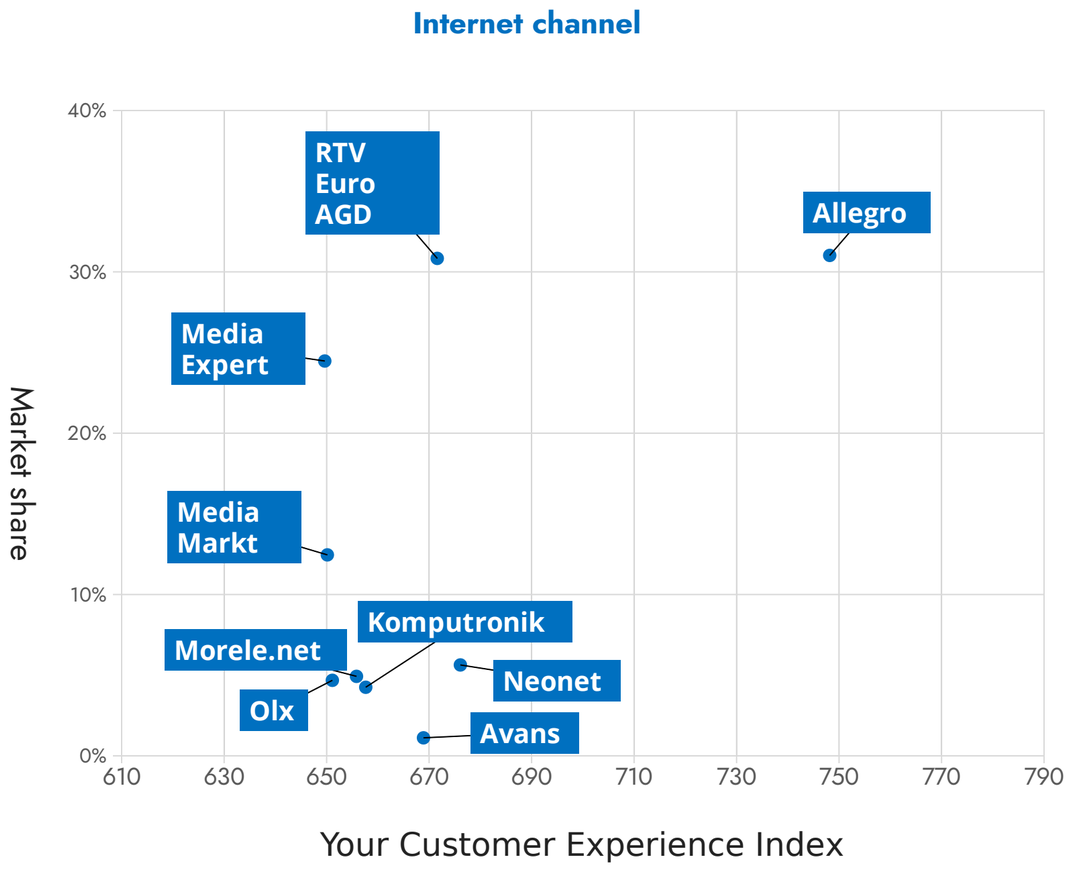
YOUR CUSTOMER EXPERIENCE INDEX

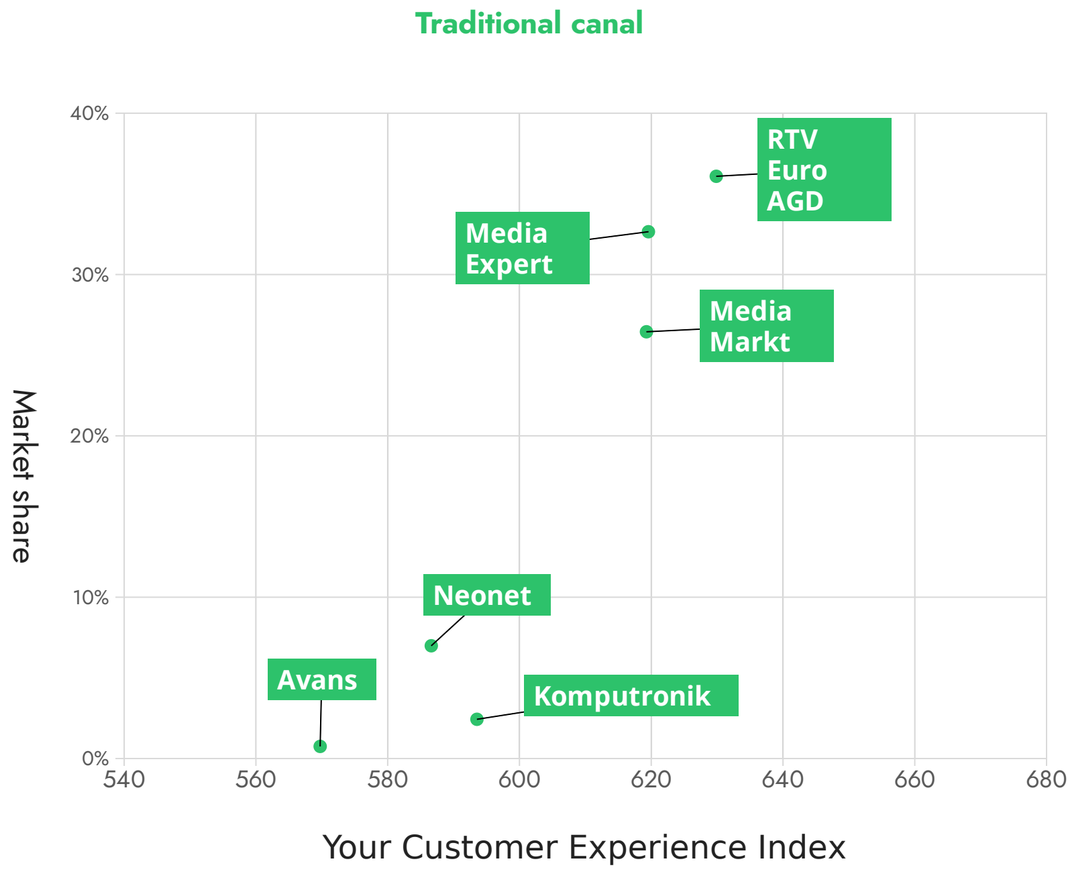
Quality indicator on a scale from 0 to 1000 with a breakdown by purchasing channel



It is noteworthy that the respondents are more positive about the experience of online shopping than about traditional sales. Allegro has the highest quality indicator in the online channel and RTV Euro AGD the highest quality indicator in the traditional sales channel.

YOUR CUSTOMER EXPERIENCE INDEX

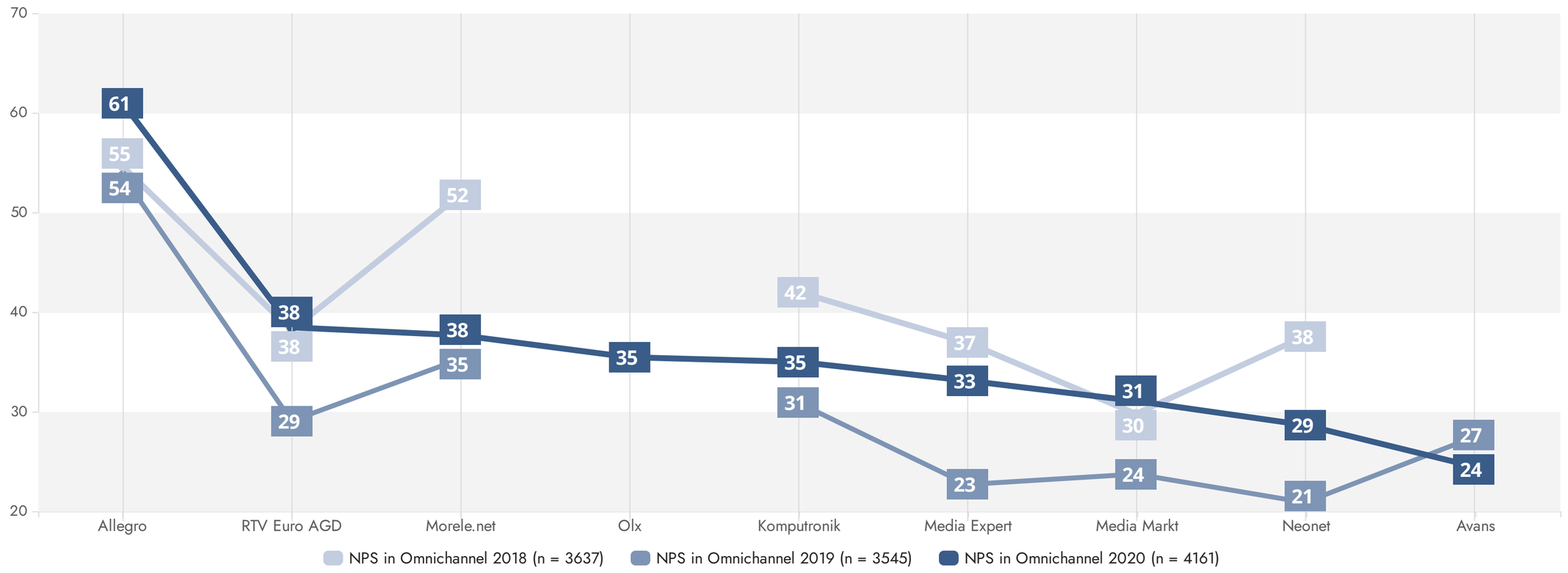




The charts show market shares depending on the sales channel and the value of Your Customer Experience Index. The Internet channel is dominated by Allegro with the largest market share and the highest quality index value. In the fixed-line channel, the largest share is held by RTV Euro AGD, which is also the leader in this area of experience.

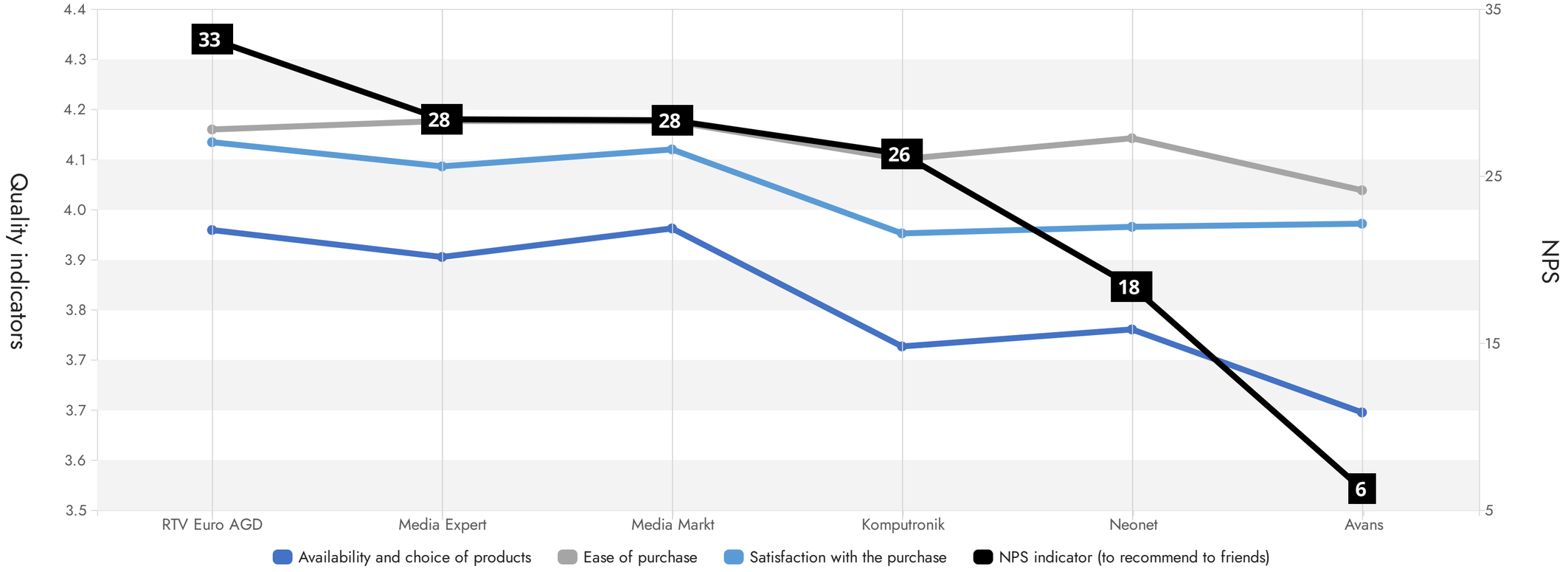
HOW LIKELY ARE YOU TO RECOMMEND THESE SHOPS TO YOUR FRIENDS?

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



TRADITIONAL CHANNEL - QUALITY ASSESSMENT OF EXPERIENCES

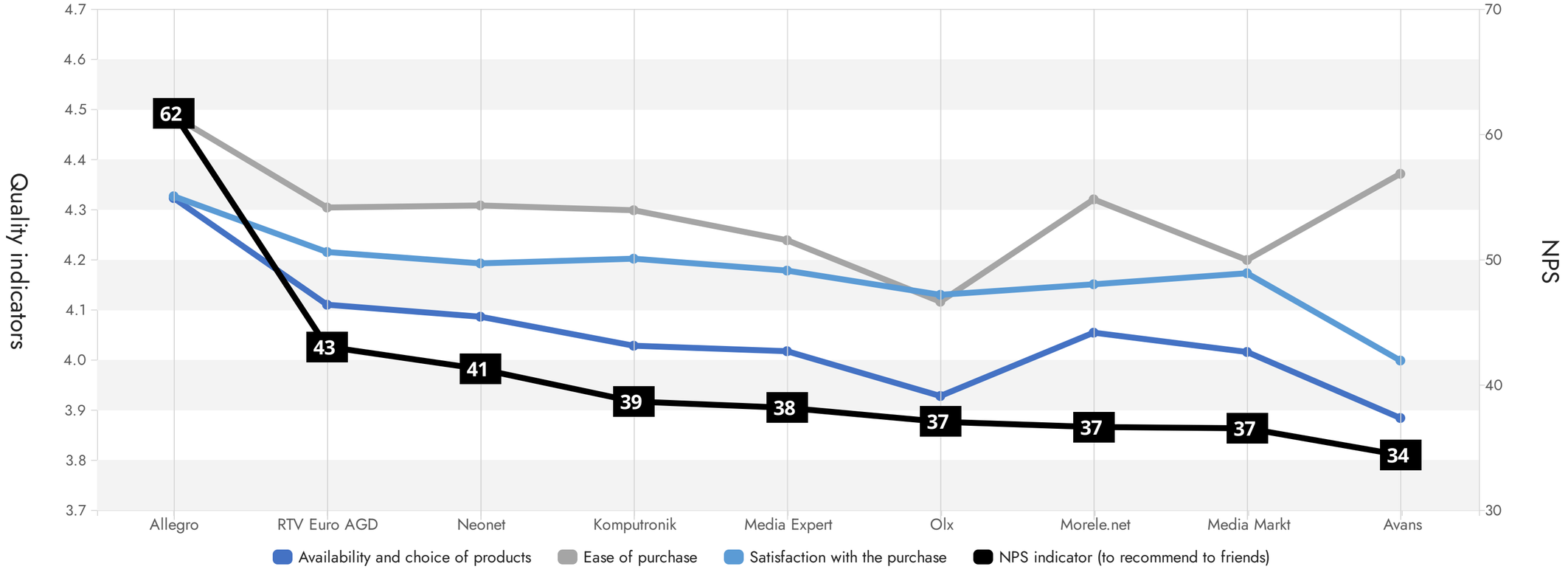
Quality ratings on a scale from 1 to 5 and NPS on a scale from -100 to 100



The highest NPS ratio in the traditional channel is recorded for RTV Euro AGD, the respondents gave similar ratings to Media Expert and Media Markt. The smallest choice is in Avans, which also received low ratings in other areas.

INTERNET CHANNEL - QUALITY ASSESSMENT OF EXPERIENCES

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



Analyzing particular aspects of the experience in comparison with the NPS indicator, we observe the strength of the Allegro brand, where high rating of ease of purchase and a large selection of products are correlated with high probability of recommending the brand to friends.

The study developed by the YourCX 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

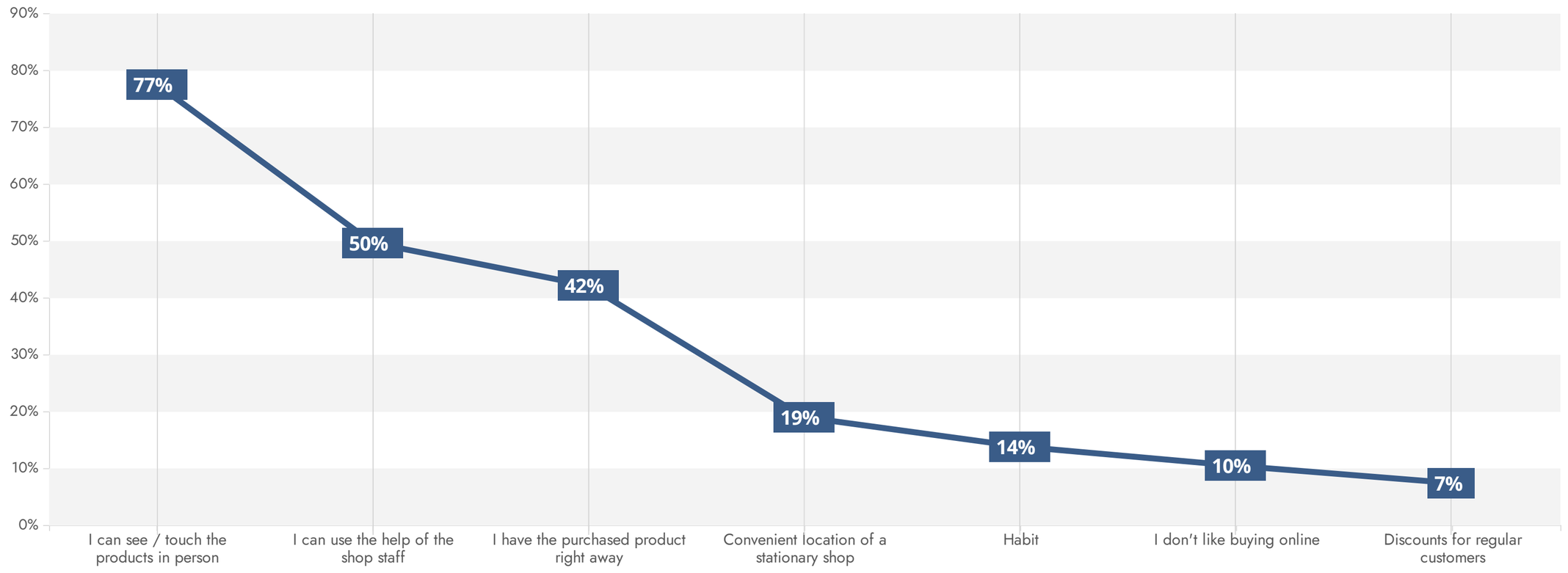
IDEACTO

SHOPPING PREFERENCES IN THE STATIONARY CHANNEL

WHY DO YOU PREFER TO BUY ELECTRONICS OR HOUSEHOLD APPLIANCES IN A STATIONARY SHOP?

Traditional channel - Multiple choice question

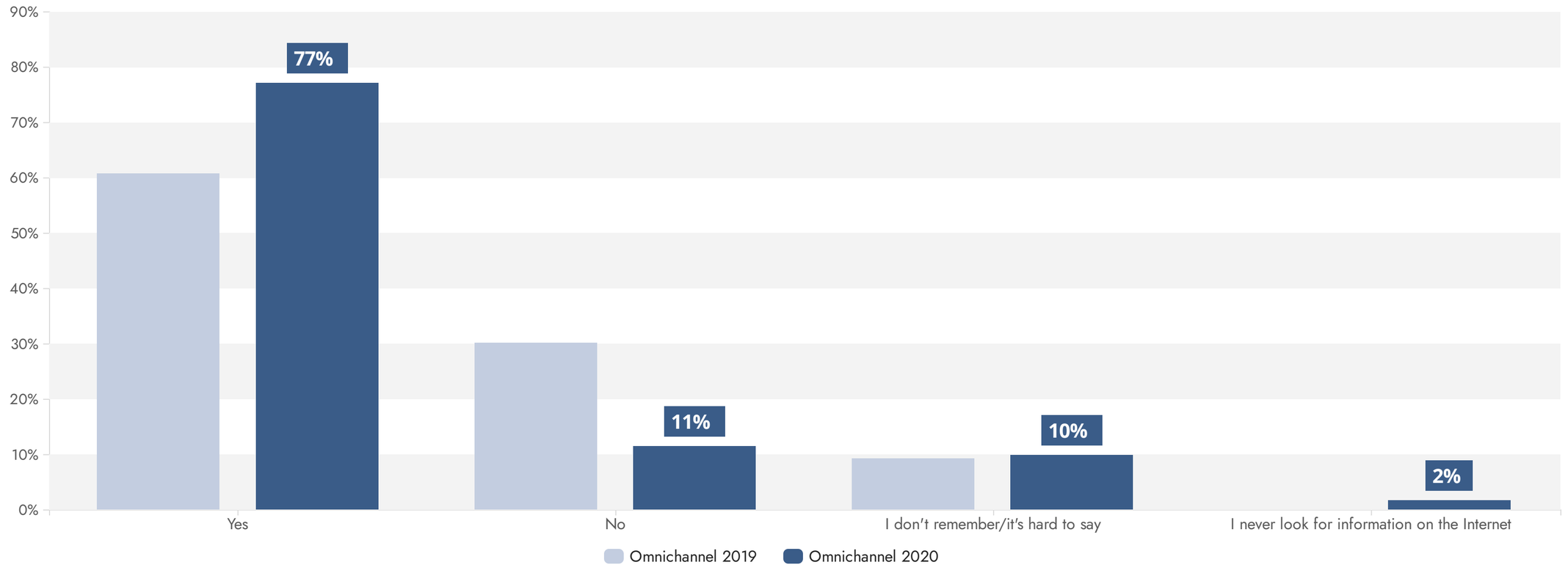
n = 1781



BEFORE THE LAST PURCHASE OF ELECTRONICS OR HOUSEHOLD APPLIANCES IN A STATIONARY SHOP, DID YOU LOOK FOR INFORMATION ON THE INTERNET?

Traditional channel - Multiple choice question

n = 1440

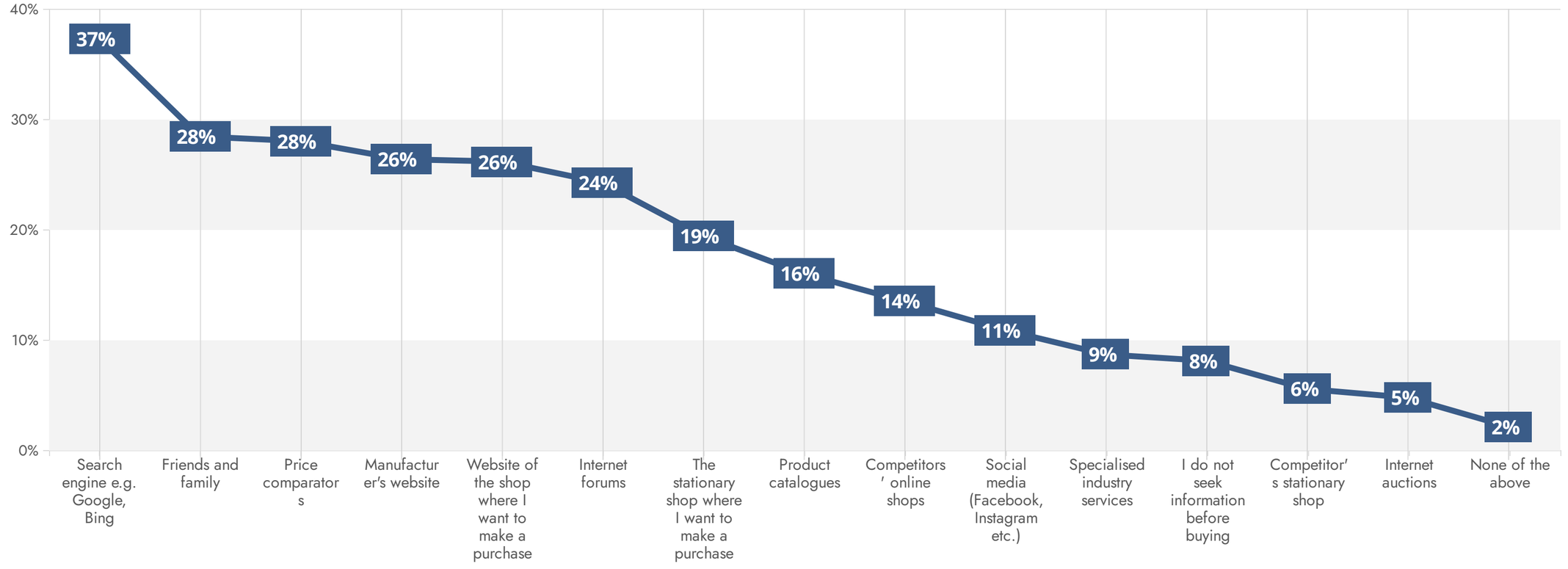


We can clearly see a decrease in the proportion of people who do not look online for product information, opinions or comparisons before making a purchase.

WHERE DO YOU OBTAIN INFORMATION ABOUT ELECTRONICS OR HOUSEHOLD APPLIANCES BEFORE PURCHASE?

Traditional channel - Multiple choice question

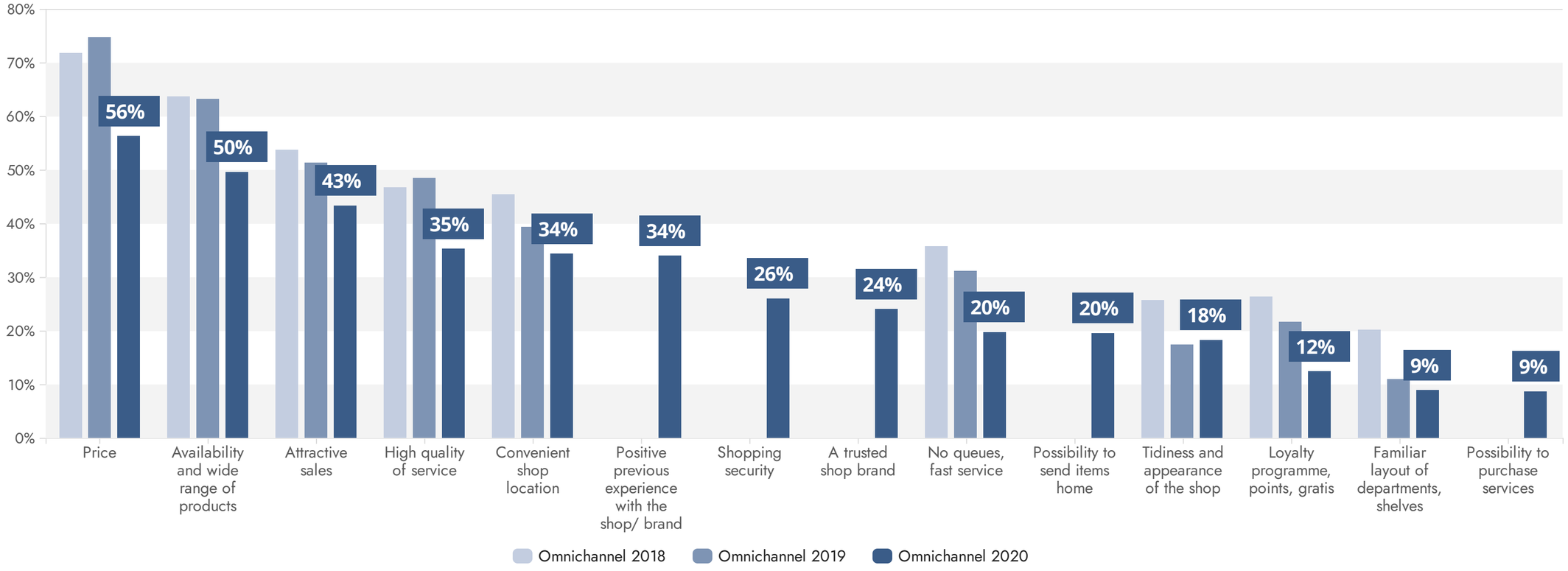
n = 1407



WHAT IS MOST IMPORTANT TO YOU WHEN SHOPPING FOR ELECTRONICS AND HOUSEHOLD APPLIANCES IN A STATIONARY SHOP?

Traditional channel - Multiple choice question

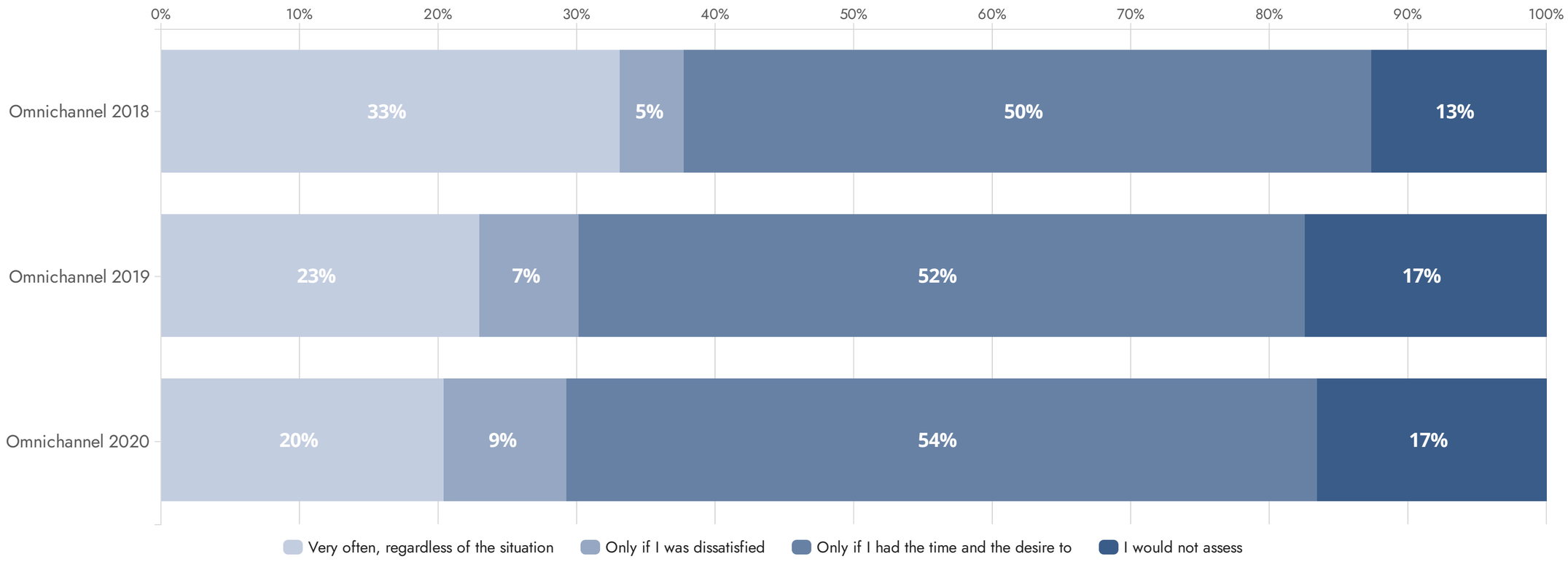
n = 1153



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

Traditional channel - Single choice question

n = 1272

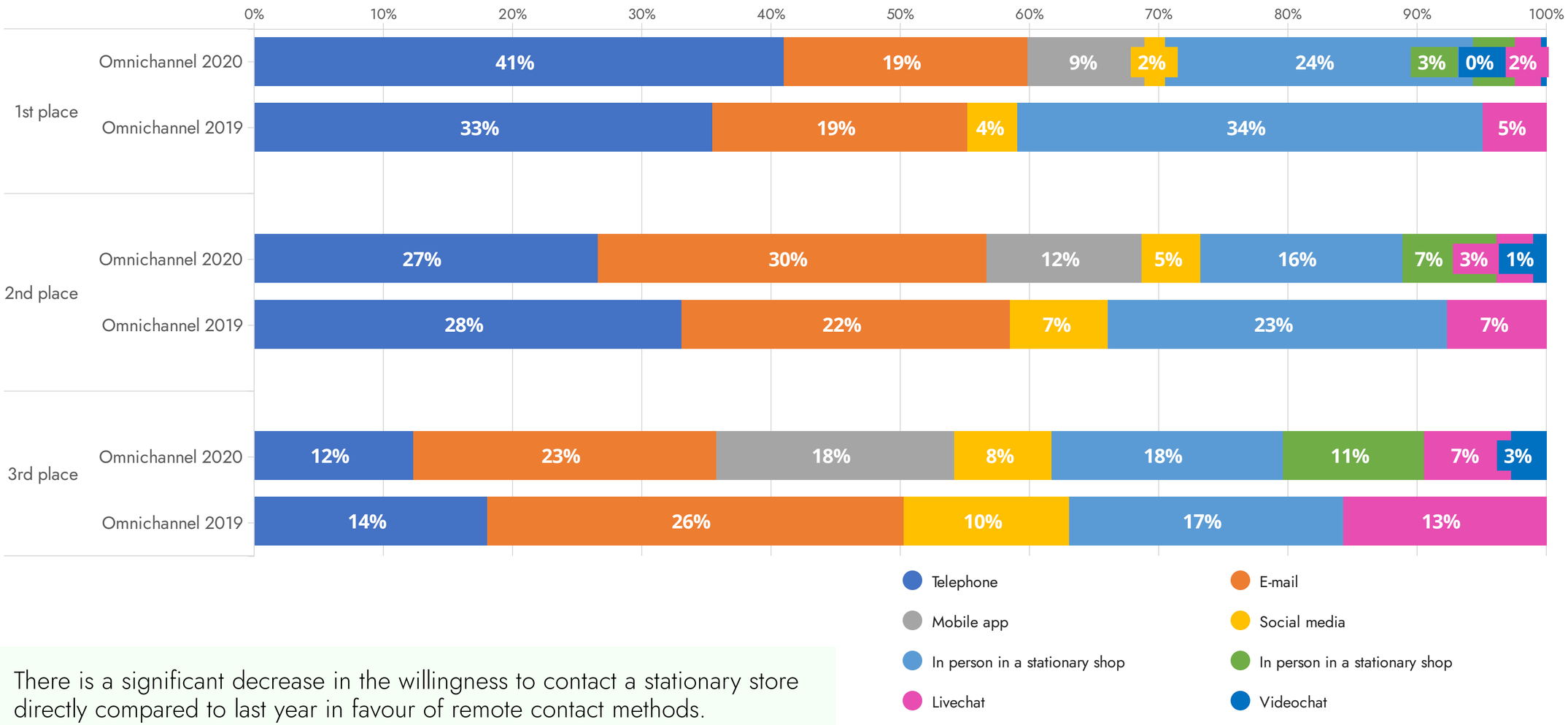


Only 17% of respondents say a strong 'No' to sharing their opinions and shopping experiences, which means that many people want to pass on their insights to others, but do not always have the opportunity to do so.

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 = 1140



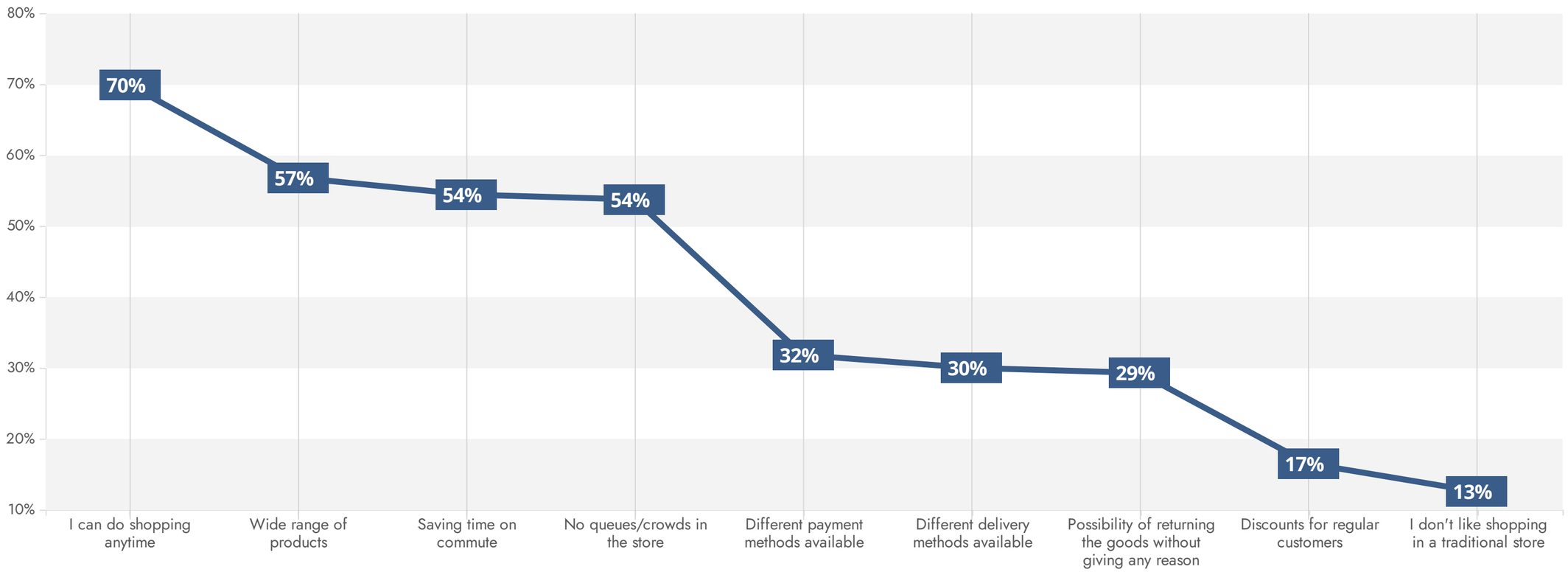
There is a significant decrease in the willingness to contact a stationary store directly compared to last year in favour of remote contact methods.

SHOPPING PREFERENCES ON THE INTERNET CHANNEL

WHY DO YOU PREFER TO BUY ELECTRONICS OR HOUSEHOLD APPLIANCES IN AN ONLINE SHOP?

Internet channel - Multiple choice question

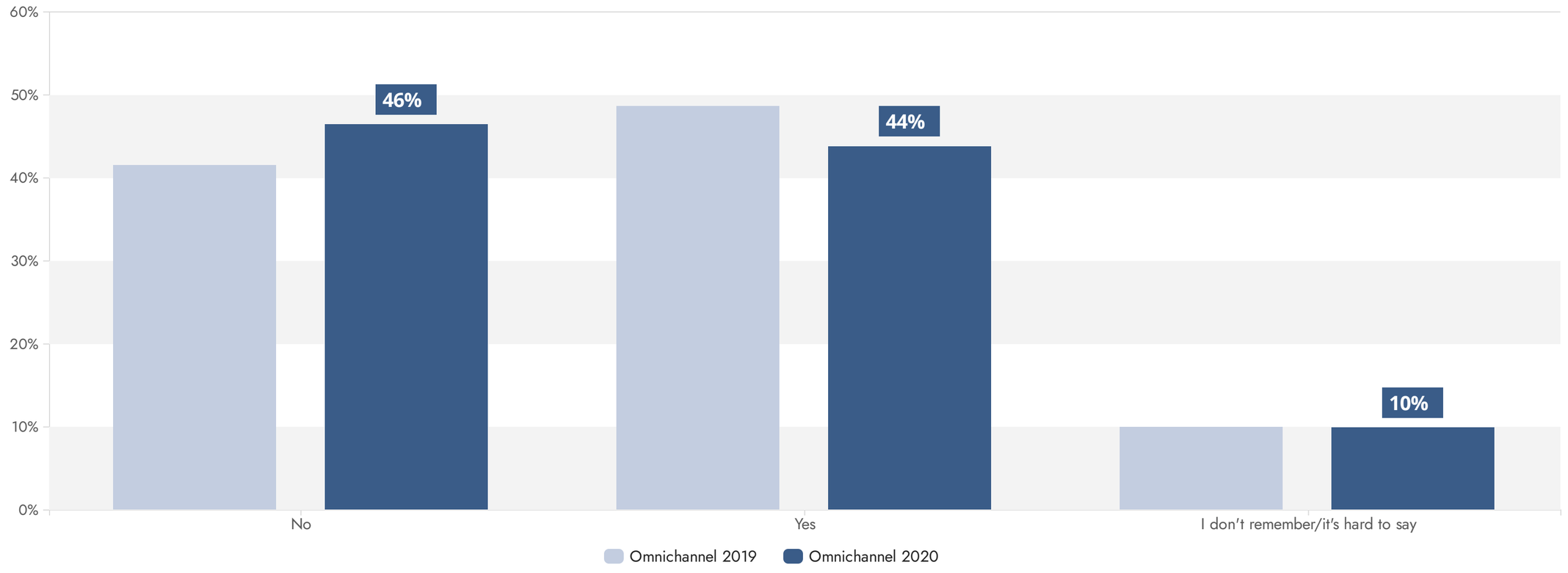
n = 1440



BEFORE THE LAST PURCHASE OF ELECTRONIC HOUSEHOLD OR AUDIO/VIDEO DEVICES IN AN ONLINE SHOP, DID YOU VISIT THE STATIONARY SHOPS TO GET ACQUAINTED WITH THE PRODUCT?

Internet channel - Multiple choice question

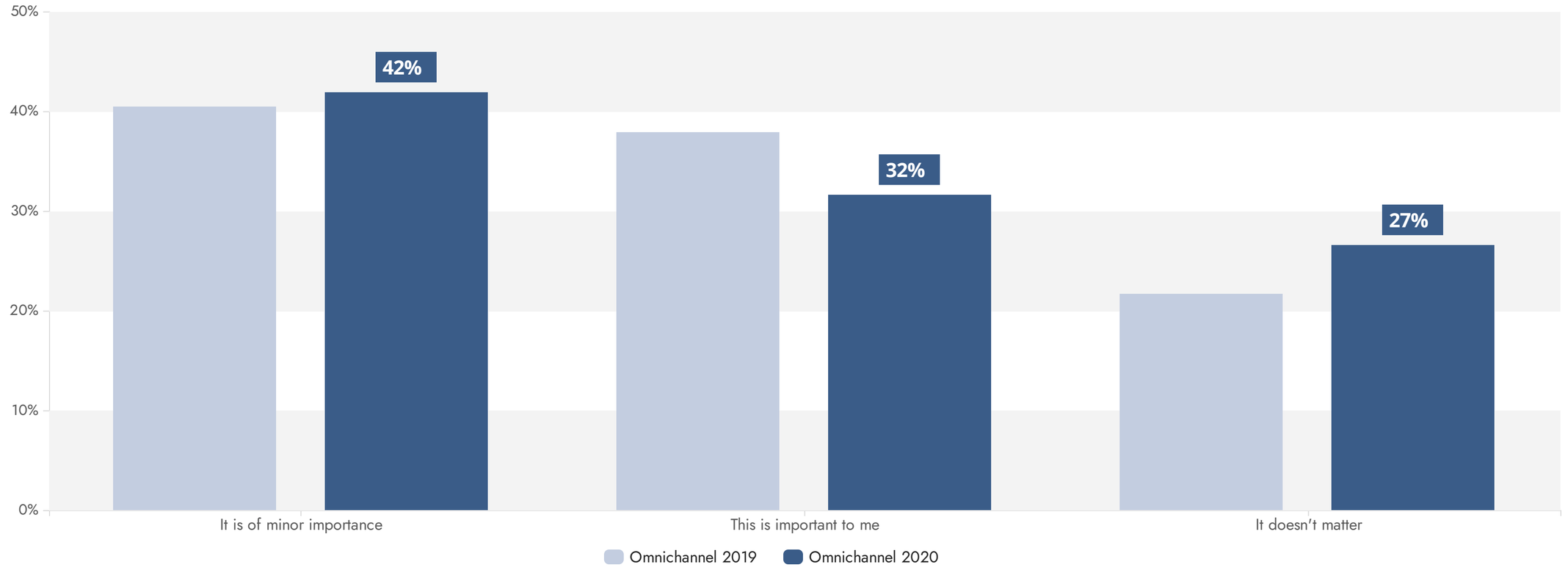
n = 1914



WHEN PLANNING ONLINE SHOPPING FOR ELECTRONIC HOUSEHOLD OR AUDIO/VIDEO DEVICES, DO YOU TAKE INTO CONSIDERATION THE PRESENCE OF A STATIONARY SHOP OF THE BRAND IN YOUR AREA?

Internet channel - Multiple choice question

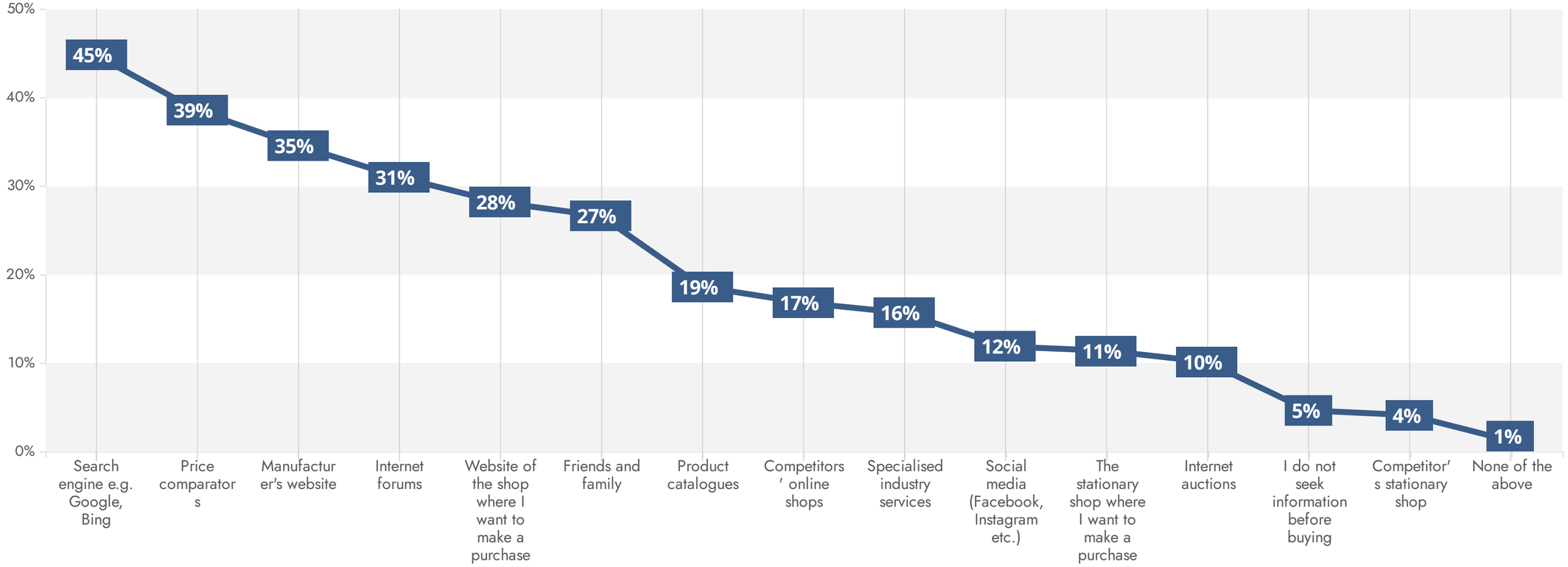
n = 1868



WHERE DO YOU OBTAIN PRODUCT INFORMATION BEFORE PURCHASE?

Internet channel - Multiple choice question

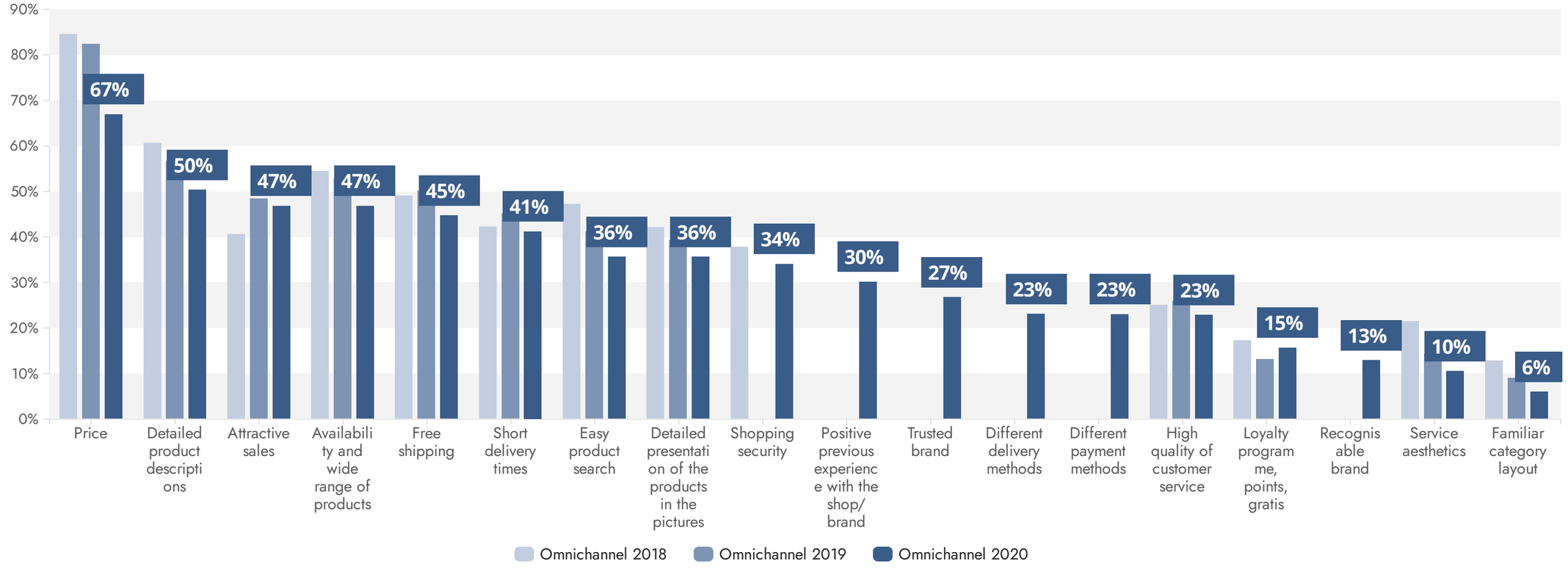
n = 1898



WHAT IS THE MOST IMPORTANT THING FOR YOU WHEN SHOPPING FOR ELECTRONIC HOUSEHOLD OR AUDIO/VIDEO DEVICES ONLINE?

Internet channel - Multiple choice question

n = 1518



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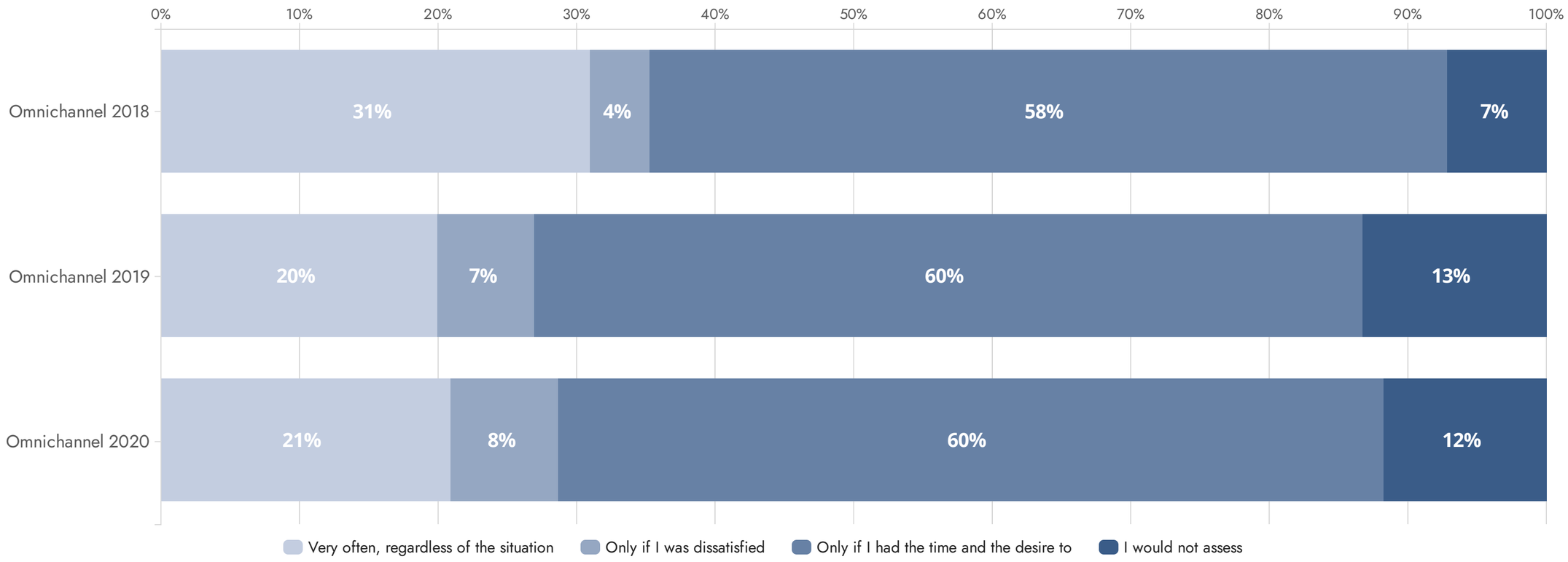
The price of a product ceases to be so important to the customer from year to year, and all accompanying circumstances such as detailed product descriptions or a wide range of products are becoming more and more important.

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

Internet channel - Single-choice question

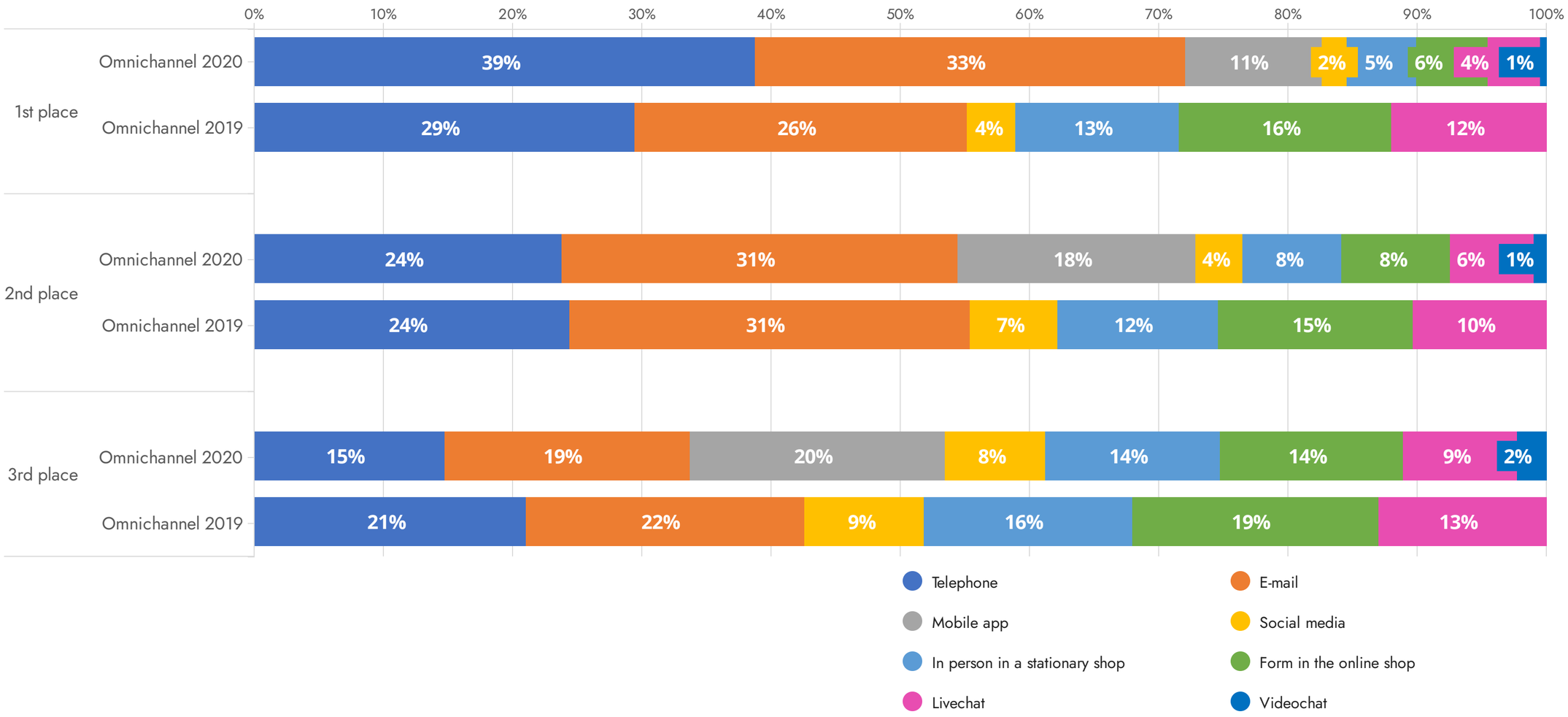
n = 3840



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 = 1575

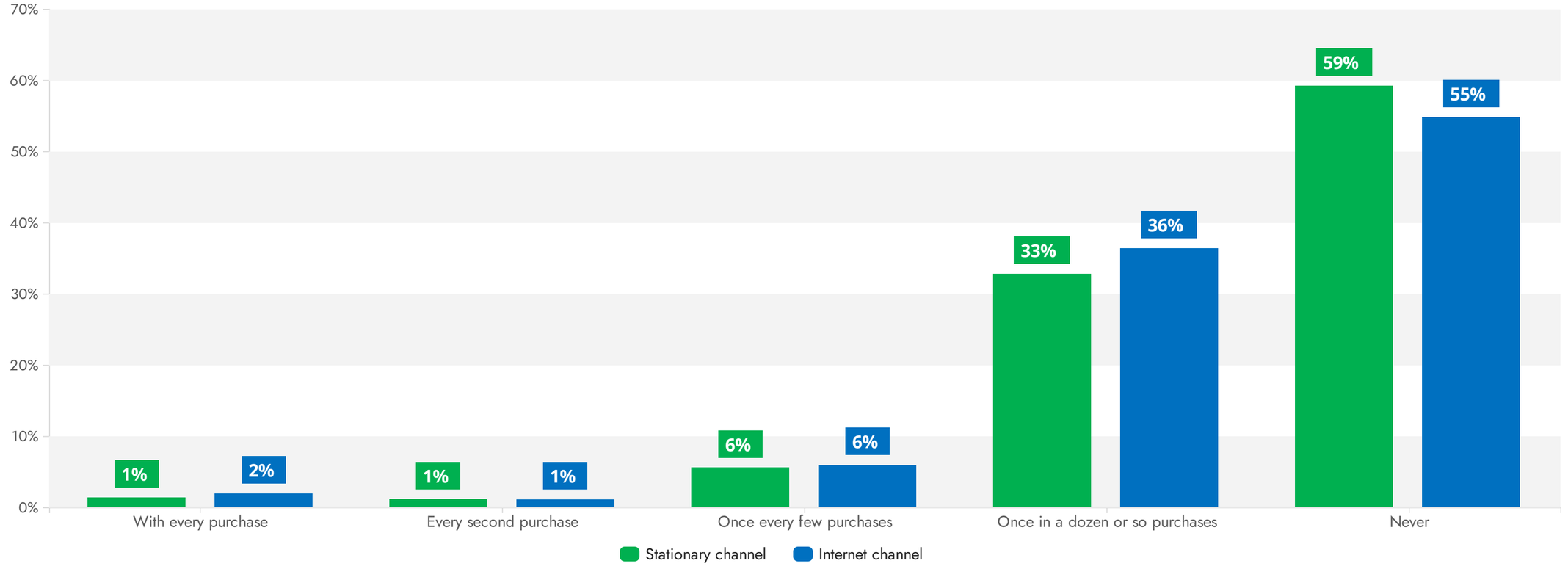


POST-PURCHASE EXPERIENCE

HOW OFTEN DO YOU RETURN YOUR ELECTRONICS OR HOUSEHOLD APPLIANCES (COMPLAINT / RETURN / EXCHANGE)?

Single-choice question

n = 2695



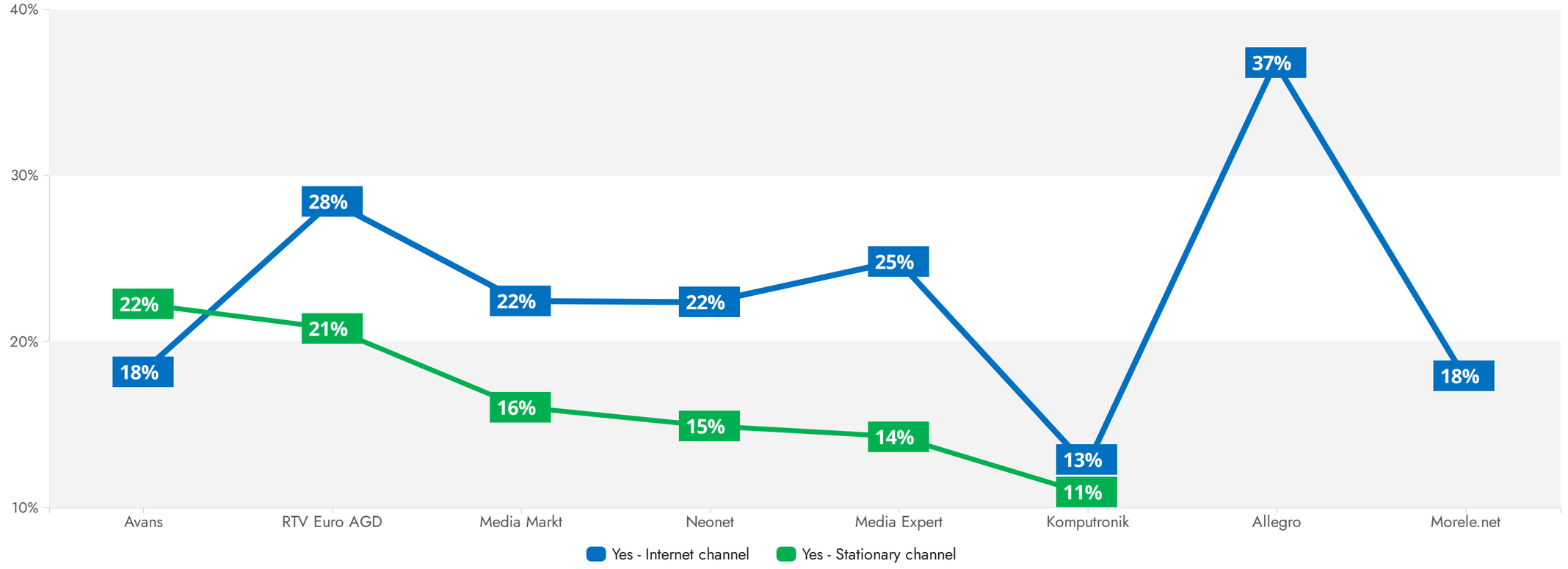
p. 40

The share of returns of purchased electronics and household appliances has similar values in the online channel as well as in stationary sales.

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 Department

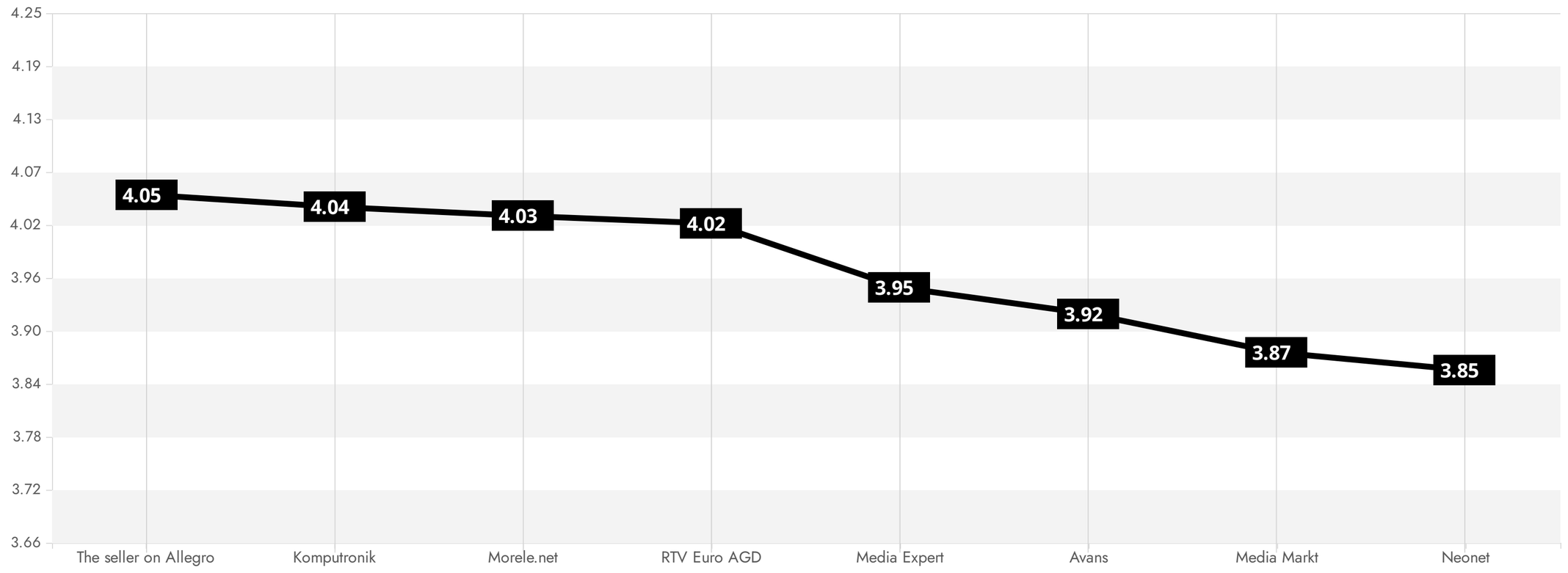
n online shop = 1562, n traditional shop = 1252



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

Evaluation on a scale of 1 to 5

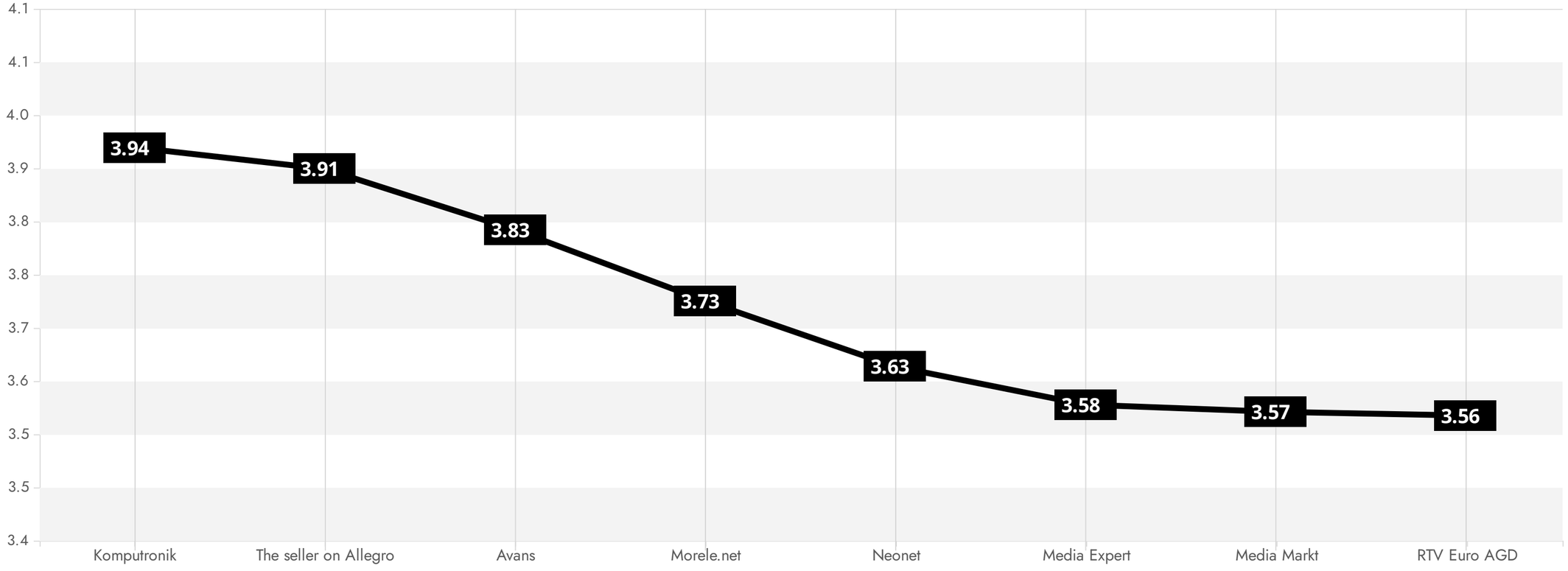
n = 1363



CONTACT ASSESSMENT WITH THE CUSTOMER SERVICE DEPARTMENT - CALL WAITING TIME

Evaluation on a scale of 1 to 5

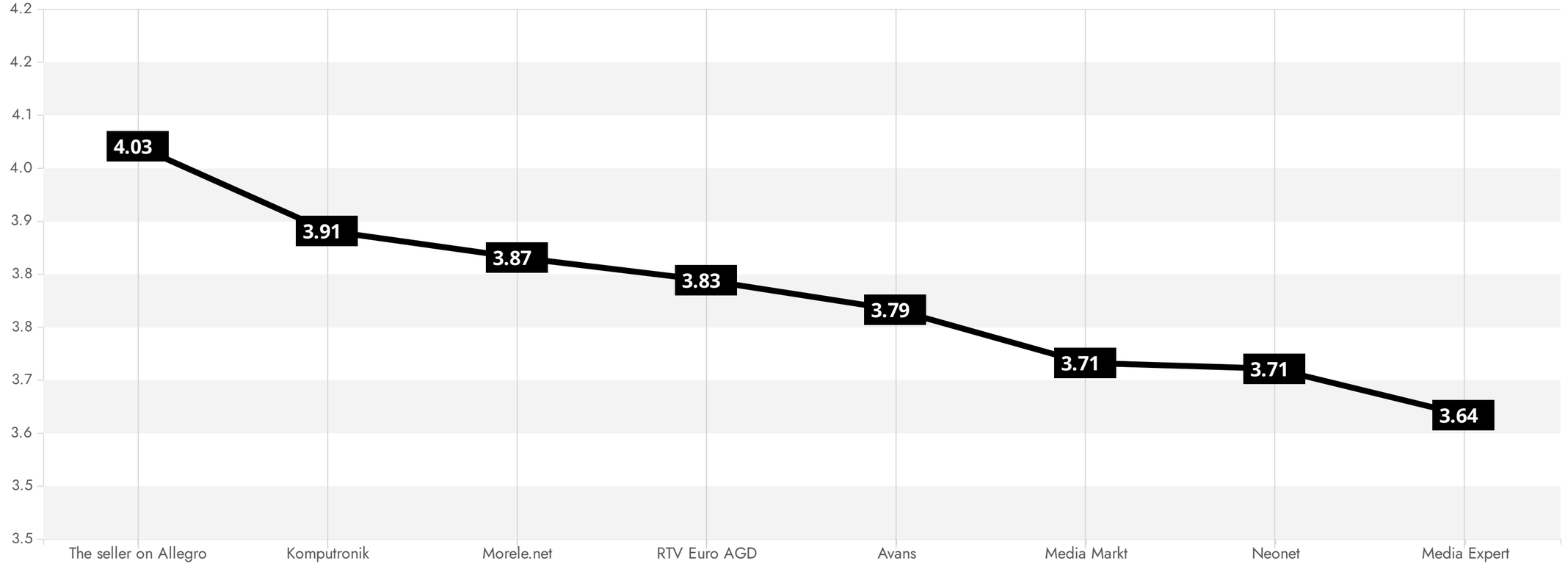
n = 1294



CONTACT ASSESSMENT WITH THE CUSTOMER SERVICE DEPARTMENT - SPEED OF SOLVING THE CASE

Evaluation on a scale of 1 to 5

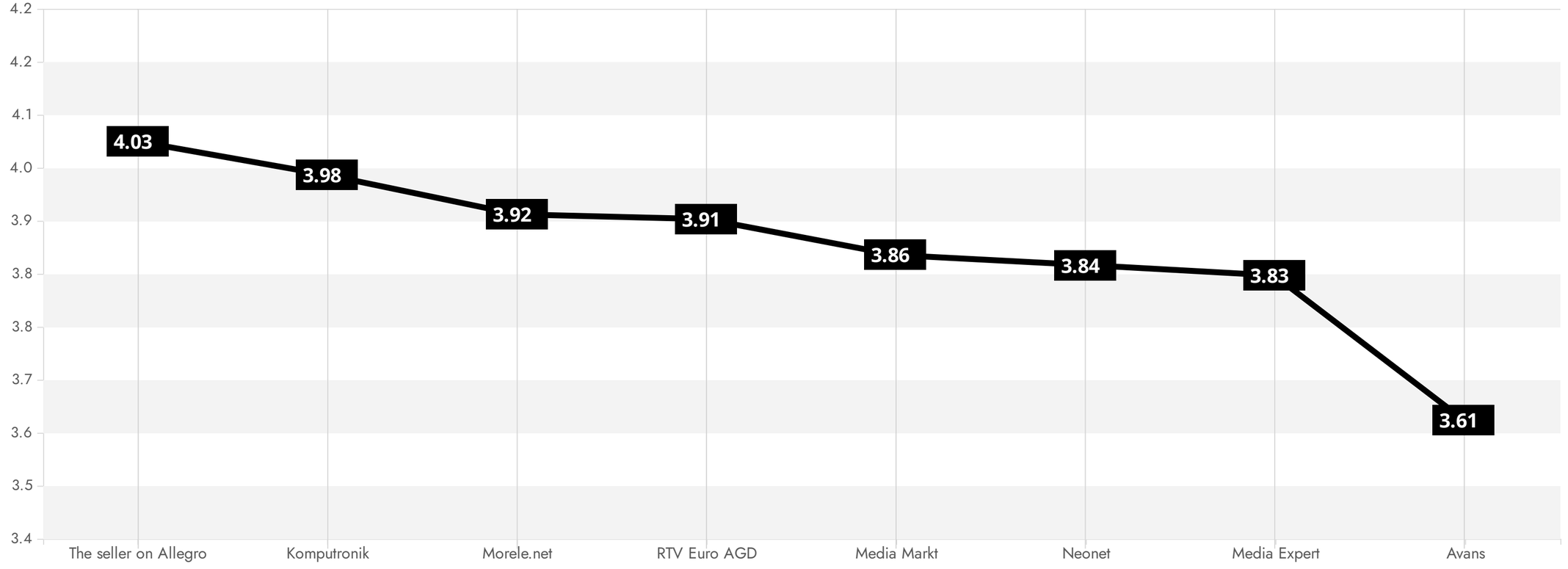
n = 1297



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

Evaluation on a scale of 1 to 5

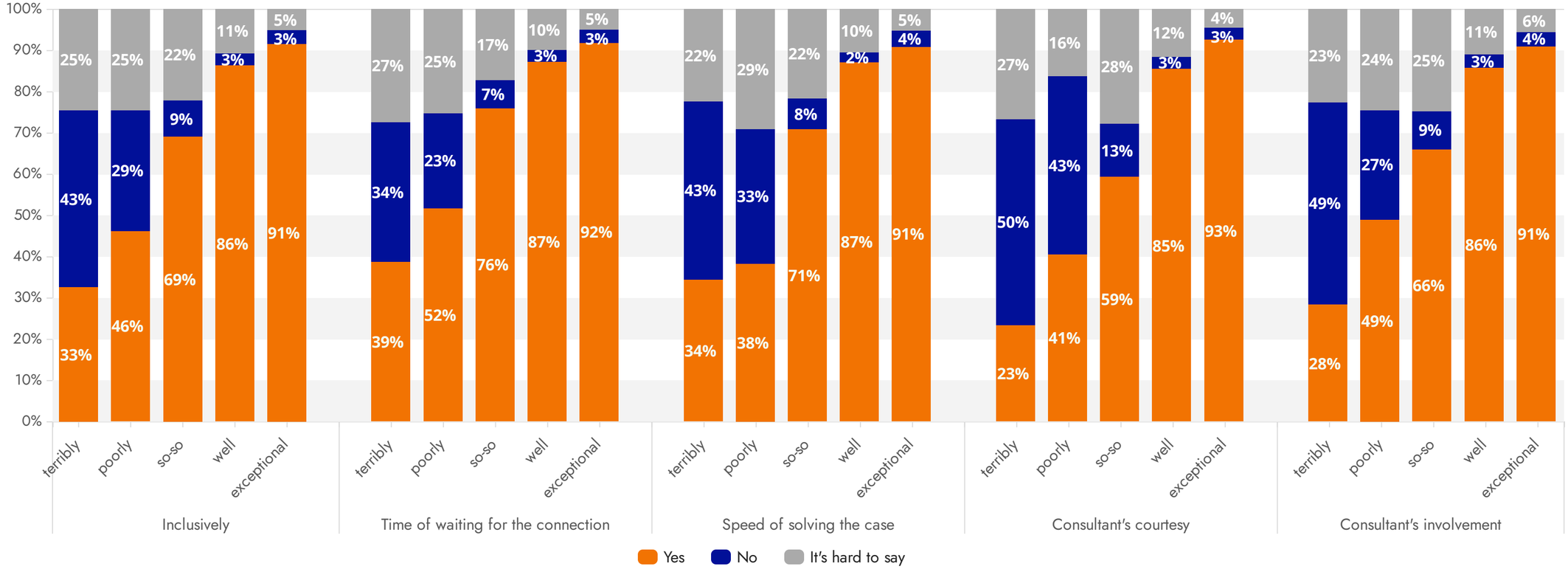
n = 1281



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

Single-choice matrix question

n = 1336



Negative assessment of a consultant's courtesy has the greatest impact (terrbily and poorly assessments) on the reluctance to use the offer of a given brand again. The strongest influence in the case of a fatal assessment is, in turn, the consultant's courtesy, the consultant's involvement, the time of solving the case and the time of waiting for the connection. This means that the most important thing is to talk to a polite consultant first, who is committed to solving the case quickly and the waiting time for a call should not be too long.

SUMMARY OF THE RESEARCH

08-09-2020

Survey conducted in August and September 2020

170 000

The survey was completed by over 170,000 people

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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!

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