YourCX

REPORT

OMNI CHANNEL 2020

REPORT

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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

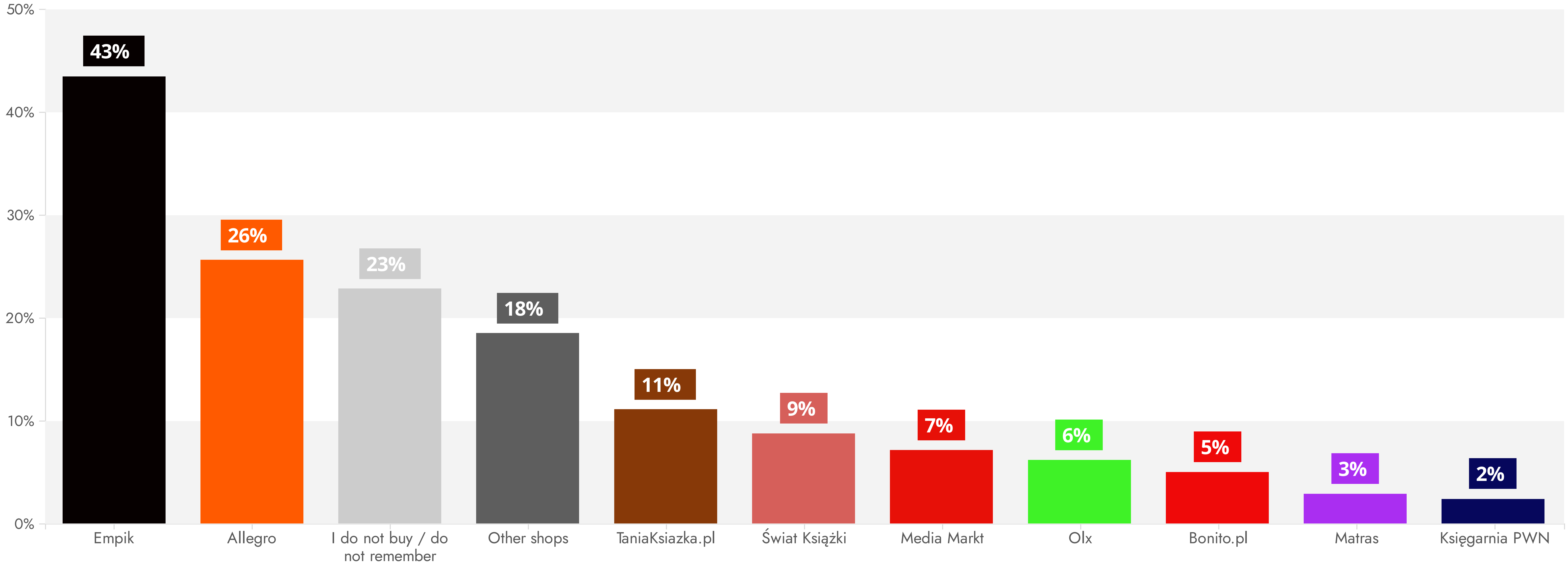
CALCULATION EXAMPLES FOR COMPANY XYZ

	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 FILMS, BOOKS, MUSIC OR OTHER MULTIMEDIA?

Multiple choice question

n = 6643

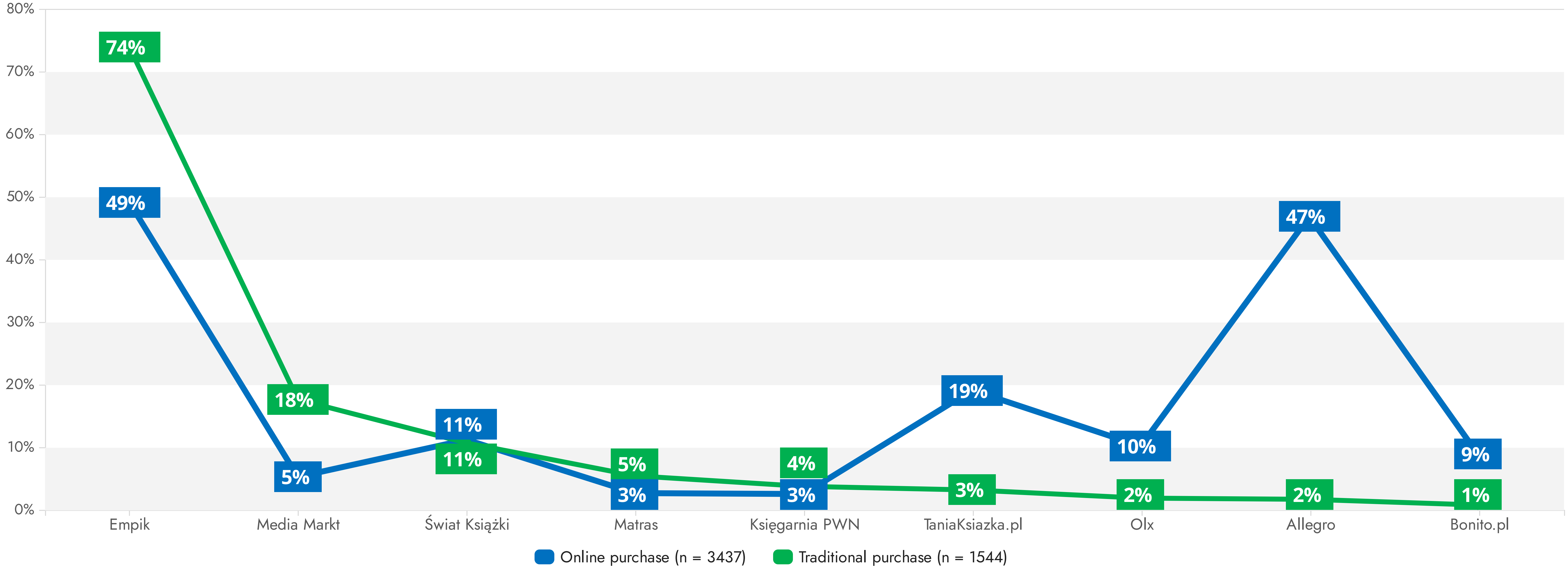


The largest fixed-line sales network has Empik and this is probably also the reason why it is an unquestionable market leader, as many as 43% of respondents in the recent past have shopped there. The second place is occupied by Allegro, which was indicated by every fourth respondent. The third place is taken by respondents who have not recently bought products from this category - 23%. The results are aggregated for all shopping channels (including online and traditional shopping).

WHERE HAVE YOU RECENTLY BOUGHT FILMS, BOOKS, MUSIC OR OTHER MULTIMEDIA?

Market shares by purchasing channel

n = 3437 online purchase, 1544 stationary purchase

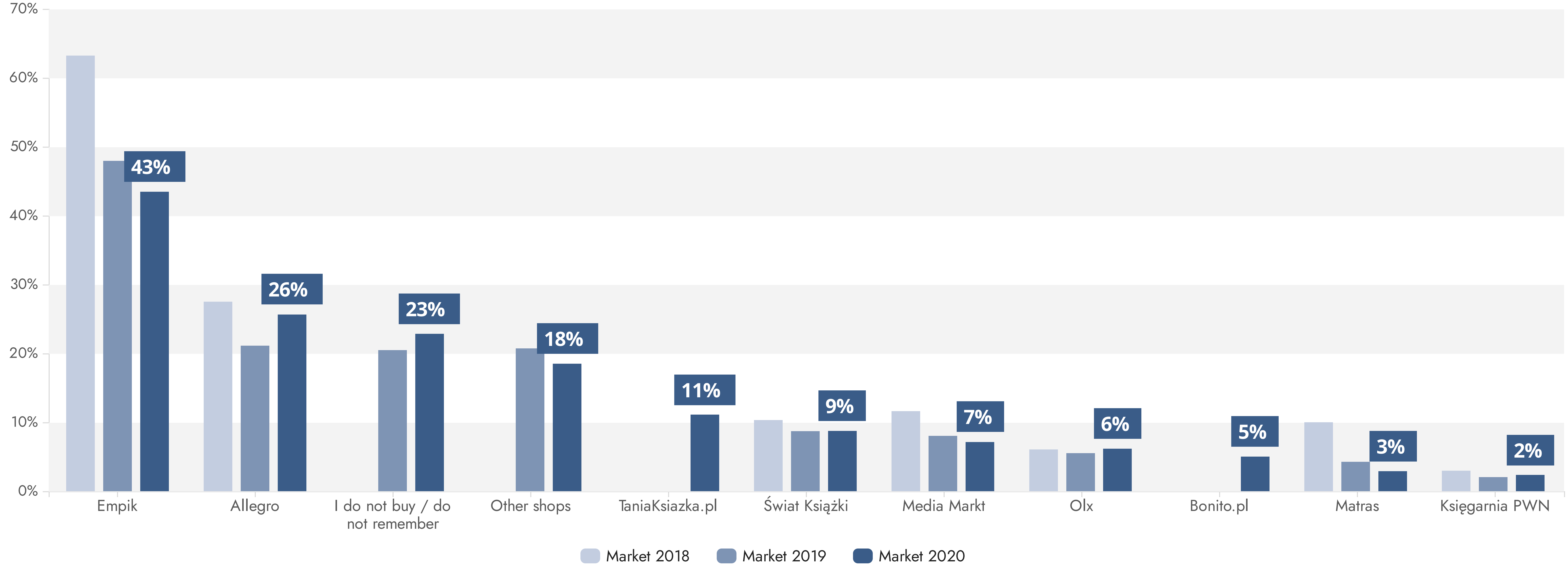


The vast majority of respondents buy products from this category in stationary stores and as much as 79% of them do so in Empik stores. In the online channel, the sales leader is Empik, followed by Allegro, Tania Książka and Świat Książki.

WHERE HAVE YOU RECENTLY BOUGHT FILMS, BOOKS, MUSIC OR OTHER MULTIMEDIA?

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

n 2018 = 4597, 2019 = 6079, 2020 = 6643

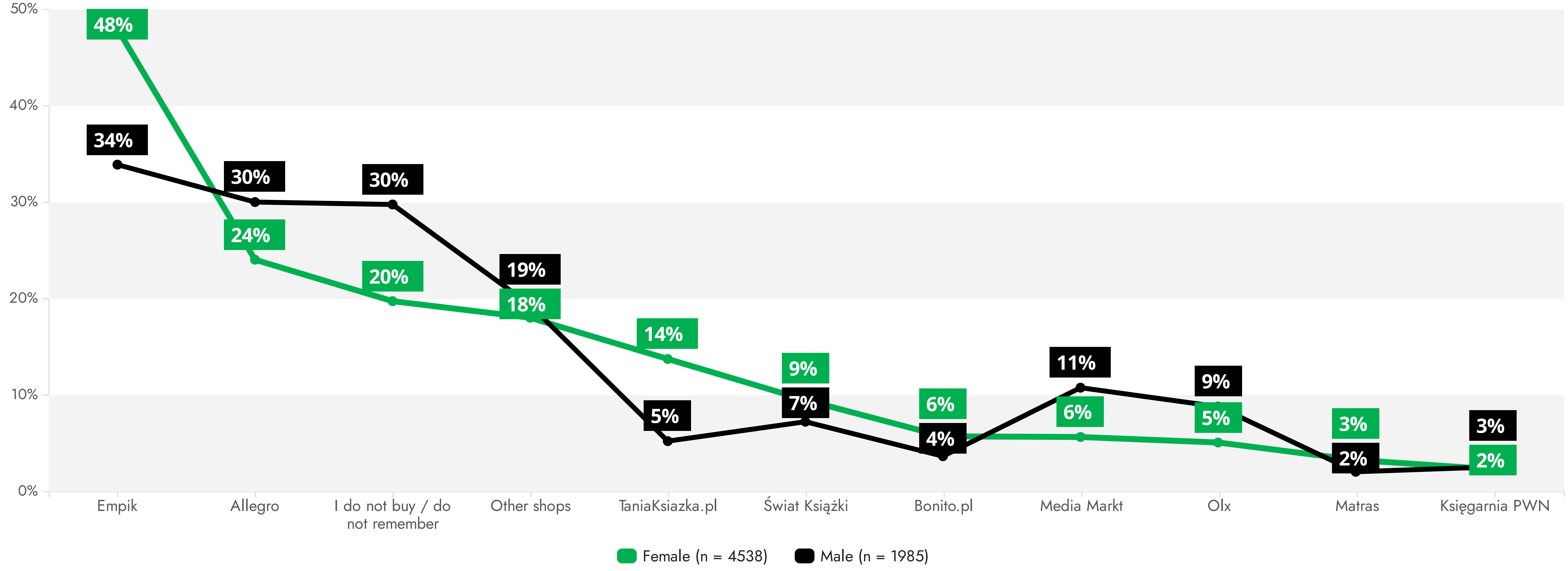


When comparing the results of omnichannel 2020 with last year's edition of the survey, we see a slight decrease in the share of purchases in the Empik network and an increase in the share of purchases at Allegro and respondents declaring that they do not purchase products from the multimedia category.

WHERE HAVE YOU RECENTLY BOUGHT FILMS, BOOKS, MUSIC OR OTHER MULTIMEDIA?

Analysis by gender

n = 6523

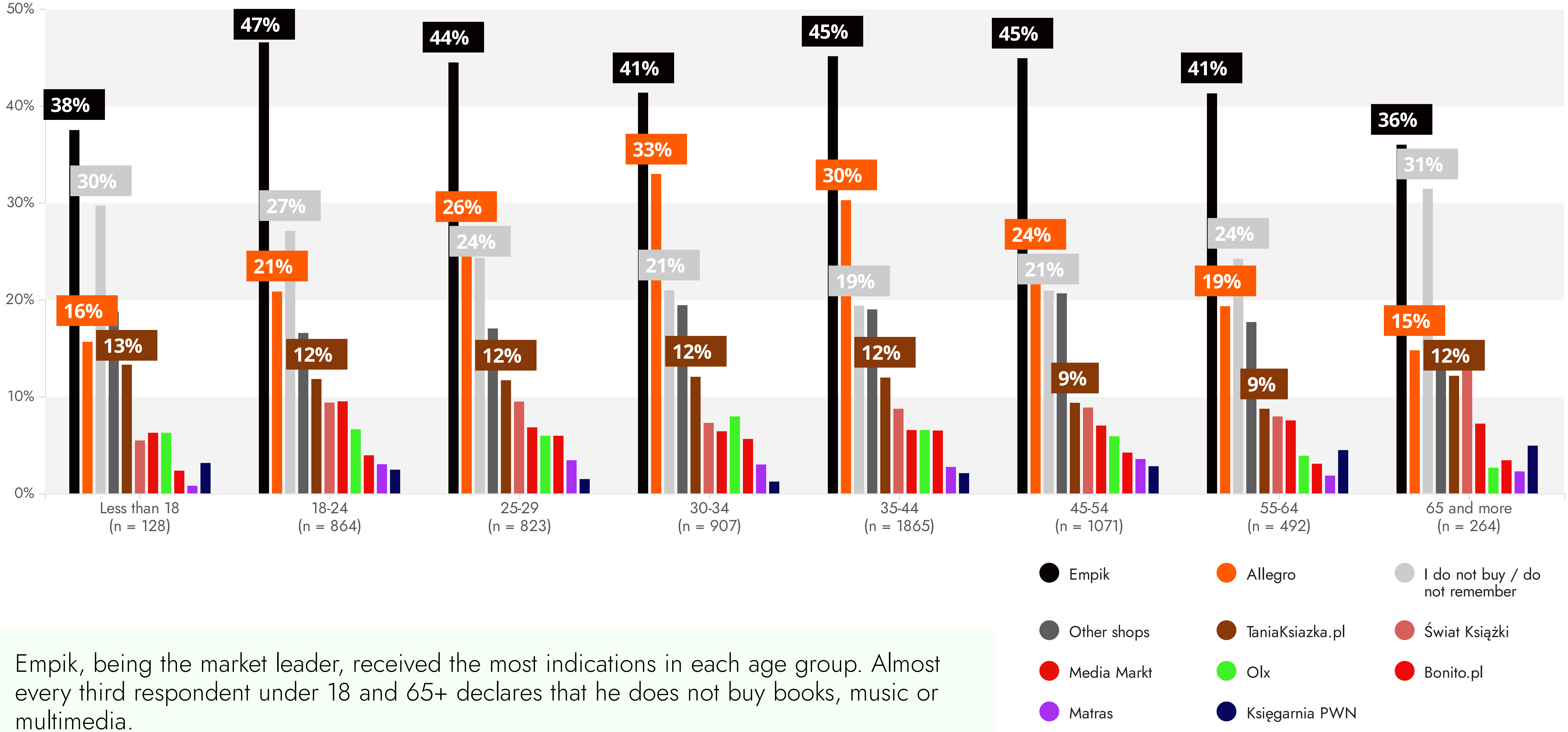


Women are more likely to buy this type of products than men, however, regardless of gender, we usually go to Empik stores in order to buy. Men more often than women do not buy or do not remember to buy multimedia.

WHERE HAVE YOU RECENTLY BOUGHT FILMS, BOOKS, MUSIC OR OTHER MULTIMEDIA?

Analysis by age

n = 6414

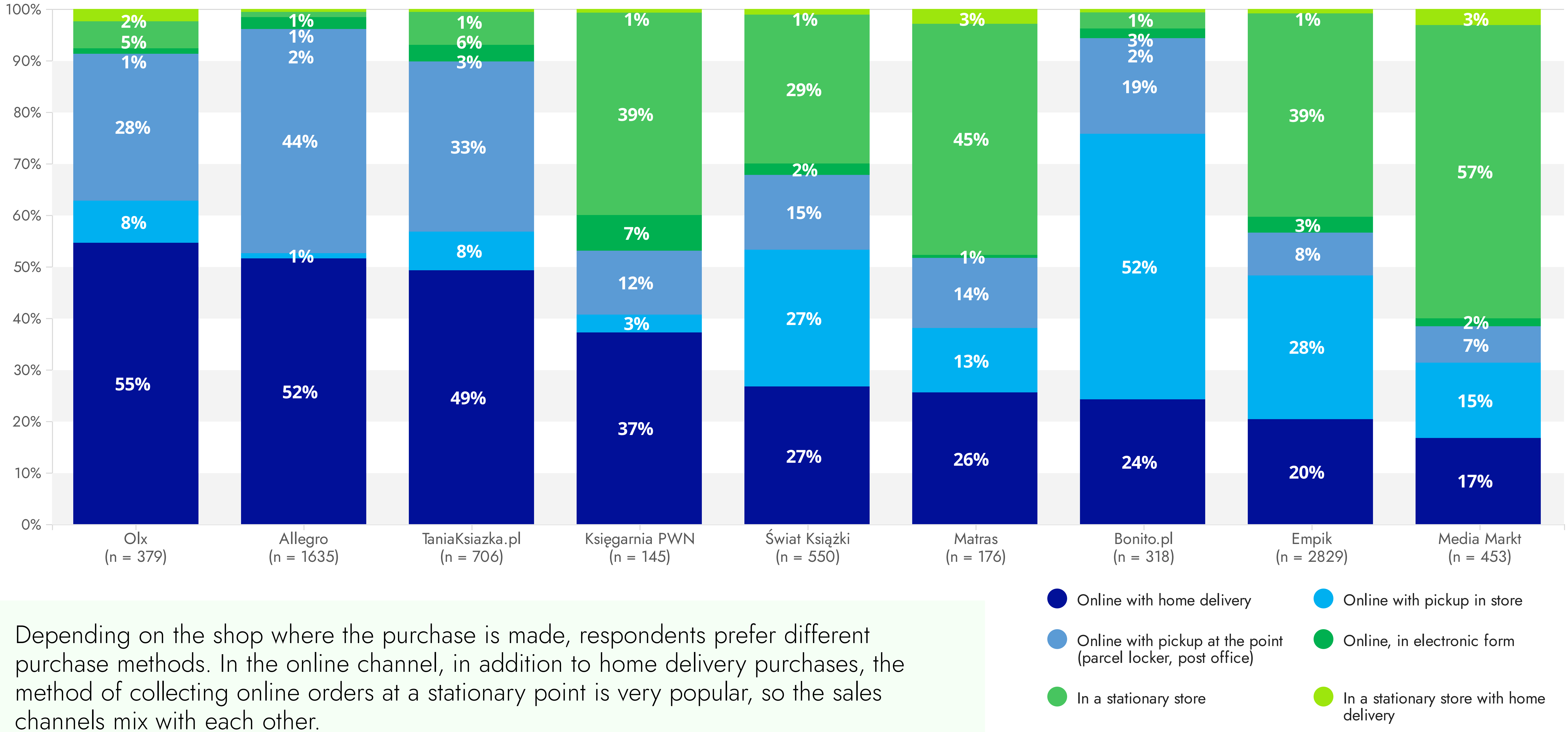


Empik, being the market leader, received the most indications in each age group. Almost every third respondent under 18 and 65+ declares that he does not buy books, music or multimedia.

HOW DID YOU BUY THE PRODUCTS THERE?

Selected purchase channel - single-choice question

n = 4436



Depending on the shop where the purchase is made, respondents prefer different purchase methods. In the online channel, in addition to home delivery purchases, the method of collecting online orders at a stationary point is very popular, so the sales channels mix with each other.

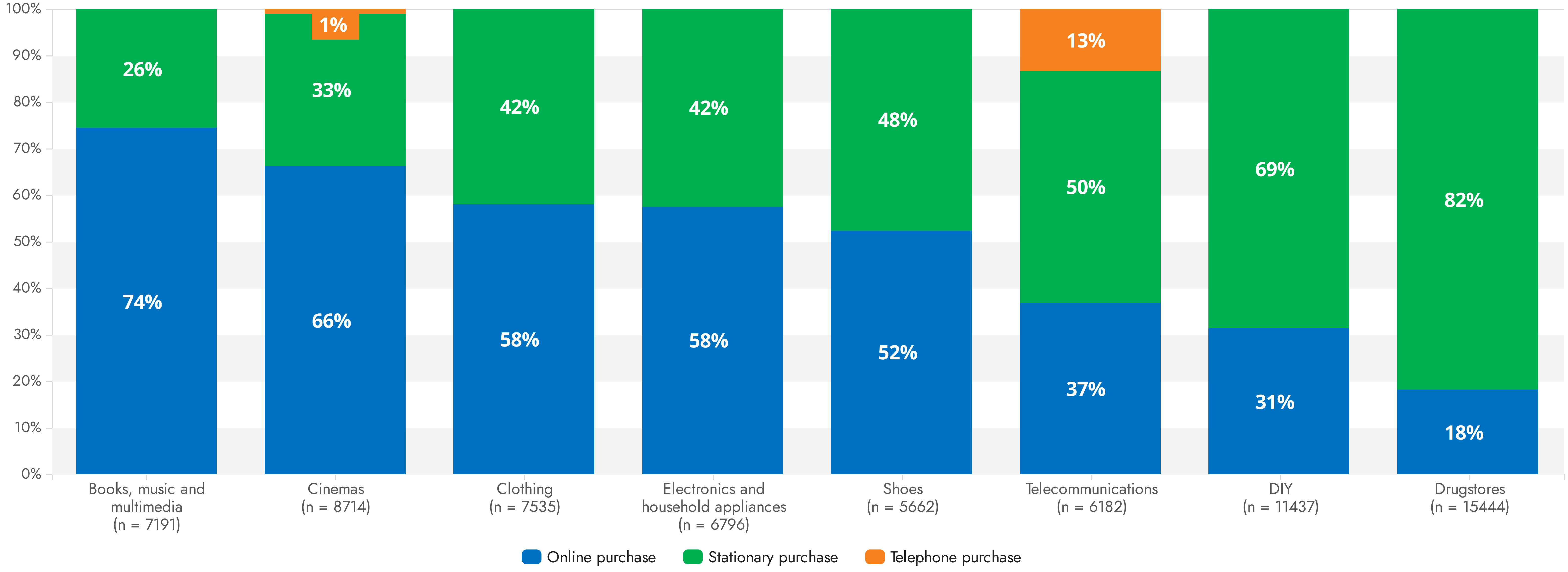
HOW DID YOU BUY THE PRODUCTS THERE?

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)	Online, in electronic form	In a stationary store	In a stationary store with home delivery	Result count
Empik	20.4% +6.6pp	27.9% -7pp	8.3% +4.4pp	3%	39.5% -6.8pp	0.8% -0.2pp	2829
Allegro	51.6% -9.7pp	1% -1.2pp	43.5% +9.1pp	2.3%	1% -0.4pp	0.6% -0.1pp	1635
TaniaKsiazka.pl	49.3%	7.5%	33%	3.3%	6.4%	0.6%	706
Świat Książki	26.7% +6.8pp	26.5% -8pp	14.5% +6.7pp	2.2%	28.9% -8.2pp	1.1% +0.5pp	550
Media Markt	16.8% +5.3pp	14.6% +1.2pp	7.1% +3.3pp	1.5%	57% -12pp	3.1% +0.7pp	453
Bonito.pl	24.2%	51.6%	18.6%	1.9%	3.1%	0.6%	318
Matras	25.6% +4.9pp	12.5% -6pp	13.6% +3.7pp	0.6%	44.9% -4.2pp	2.8% +1.1pp	176
Księgarnia PWN	37.2% +5.5pp	3.4% -10.5pp	12.4% +2.5pp	6.9%	39.3% -1.3pp	0.7% -3.3pp	145

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

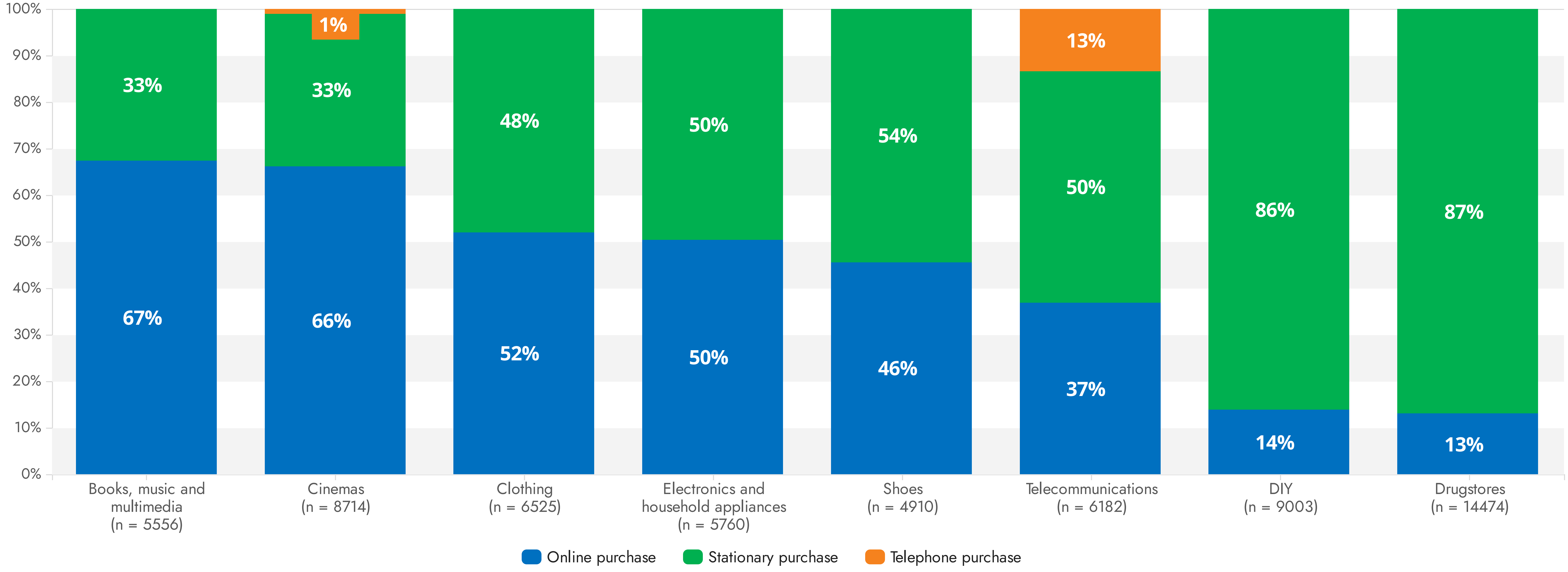
Comparison of selected channels between industries



Comparing the methods of buying books, music and multimedia with the industries studied by Omnichannel 2020, we can see how important it is for this sector to have extensive and efficient online sales.

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 shopping in the above analysis compared to the previous page show how strong Allegro is on the Polish market.

EXPERIENCE QUALITY INDICATORS

p. 15

The multimedia market, especially within it, the book market in Poland is changing very dynamically and the offer is diverse. In our backyard, there is no shortage of foreign literature, but also of our native literature. Last year has shown that we are eager to reach for science-fiction books, thanks to the screening of Andrzej Sapkowski's books or the Nobel Prize for Olga Tokarczuk. The question is what form readers use most often. The market of digital publications is constantly growing and will continue to grow over the next few years, perhaps not so dynamically, but still. The current covid reality works in favour of online publications, where we can access the reading quickly, conveniently, we don't even have to leave the house and we are sure that nobody had it in their hands before, and the promotion of a paper book requires real contact with another person (bookstore, meetings with authors, trade intermediaries).

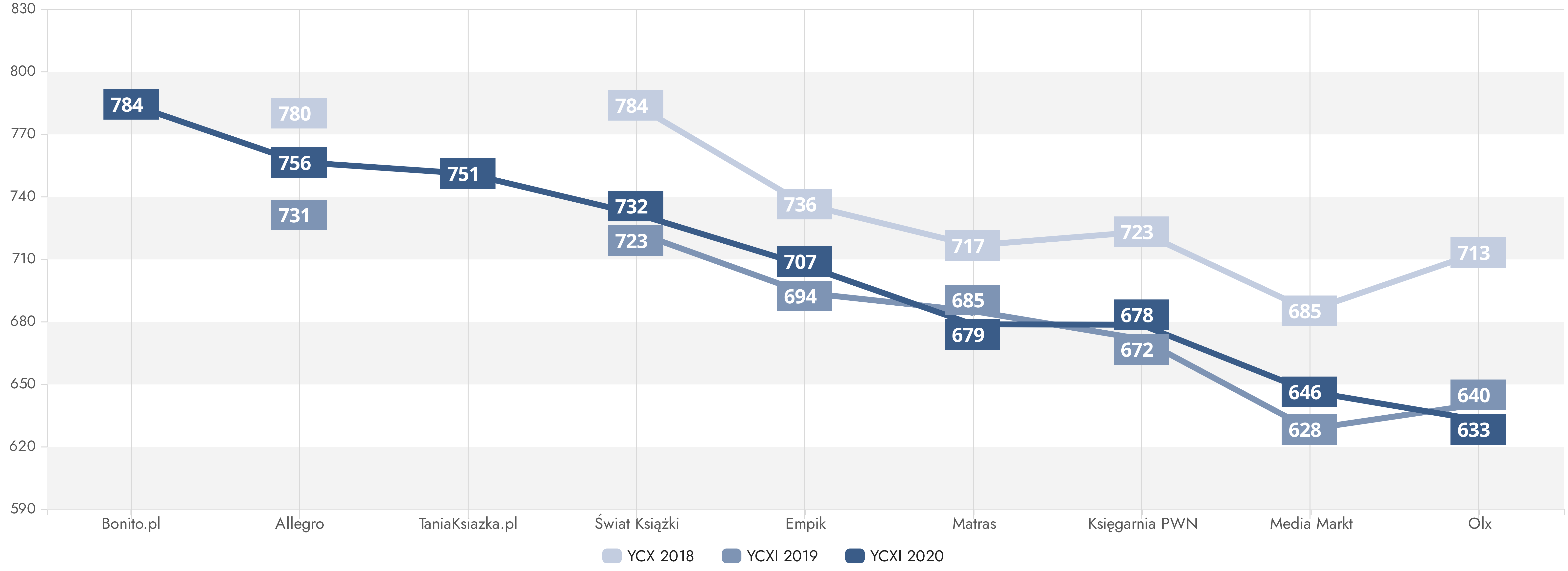
The Omnichannel 2020 report, prepared by YourCX, shows the dominance of Allegro in online sales. We can clearly see that Allegro has equalled the previous sales leader, Empik. On the Internet, the promotion looks different, and the popularity depends on the way of positioning, comments and commands in social media, where by clicking on the link we will quickly learn the opinions of others and read a fragment of the book. Due to lower expenditure on promotion on the Internet, the book is often also slightly cheaper, and besides, we have here a larger selection of products, which, as the data presented in the report show, is important for us, the Readers.

The plurality of Internet sales points gives smaller publishers the opportunity to reach a wider audience. As one of such publishers, I recommend reading the Omnichannel 2020 reports.

Natalia Kusaj
Co-owner of Ponad Wszystko Publishing House

YOUR CUSTOMER EXPERIENCE INDEX

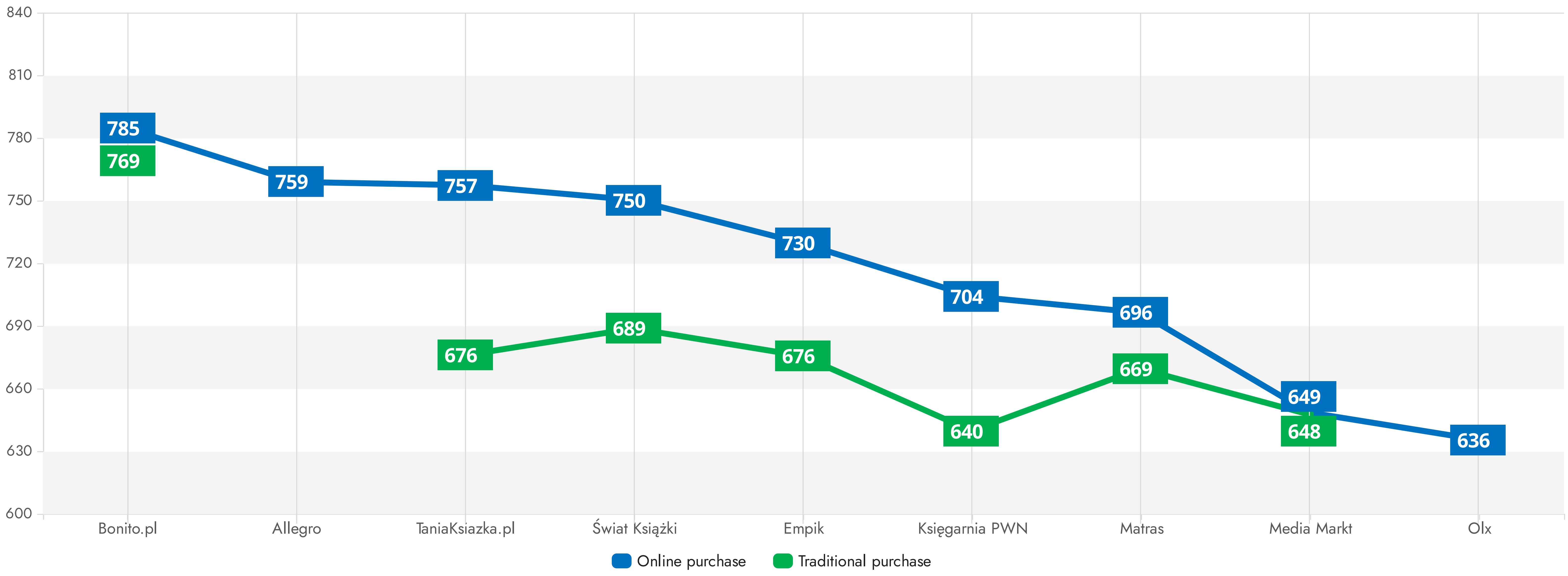
Quality indicator on a scale from 0 to 1000 taking into account four satisfaction factors:
availability and choice of products, ease of order placement, satisfaction with the purchase, willingness to recommend the store to friends



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 two thirds of the possible points. The industry leaders are Bonito.pl, Allegro, Tania Książka, Świat Książki and Empik. Most of the surveyed companies have improved their results compared to the previous year.

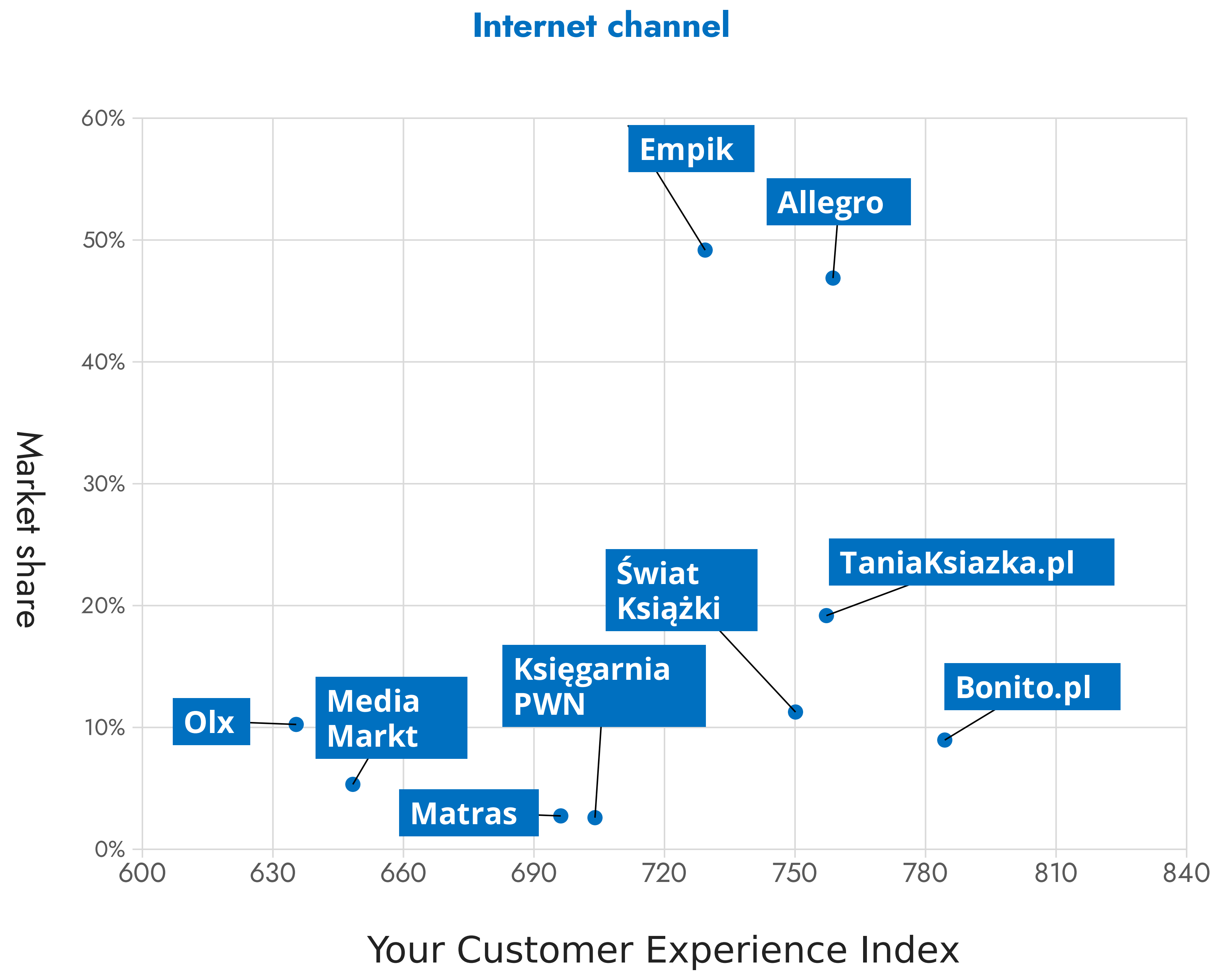
YOUR CUSTOMER EXPERIENCE INDEX

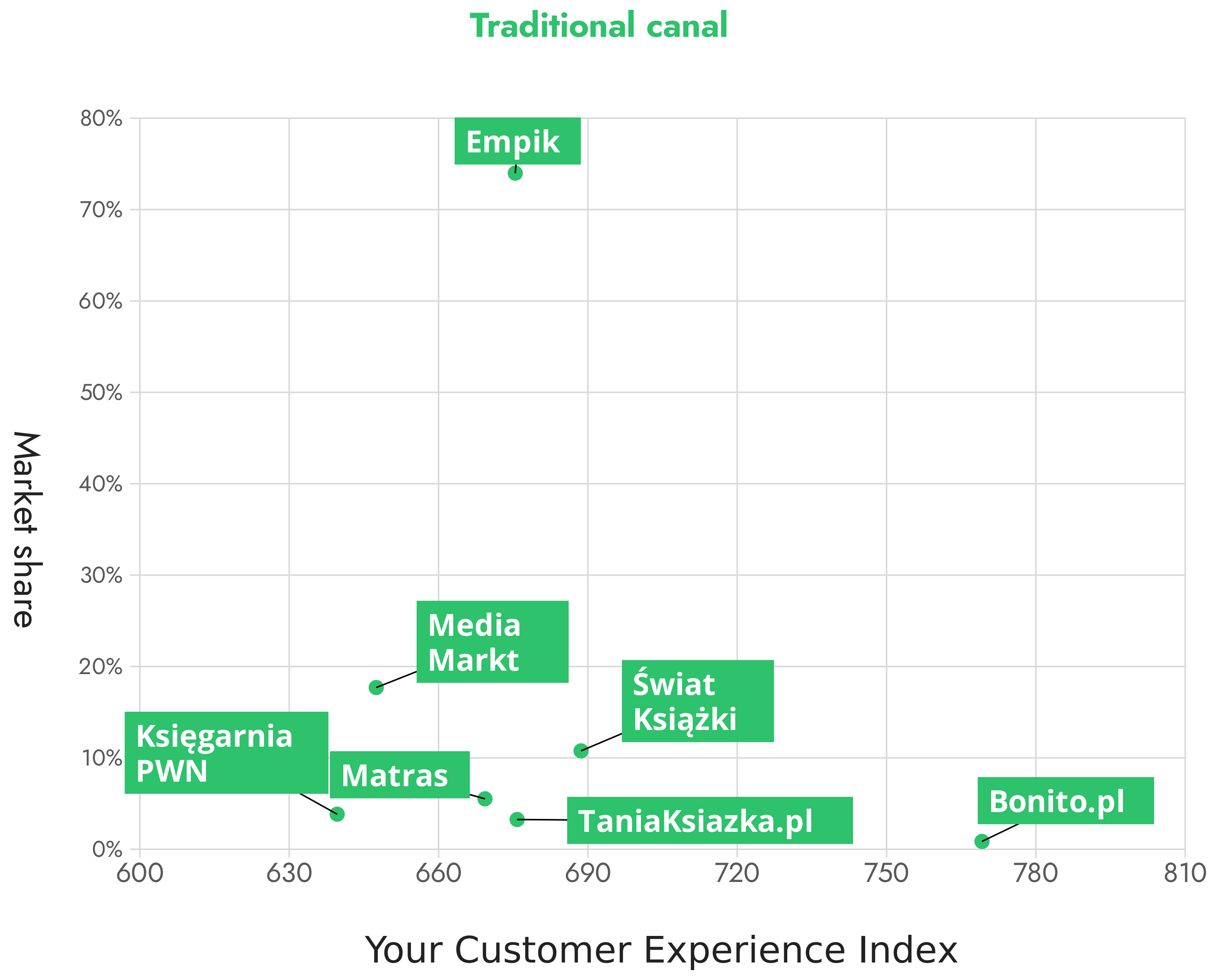
Quality indicator on a scale from 0 to 1000 with a breakdown by purchasing channel



It is noteworthy that the respondents positively assess the experience of online shopping more than that of traditional sales. Bonito.pl can boast the highest quality indicator in the online channel.

YOUR CUSTOMER EXPERIENCE INDEX

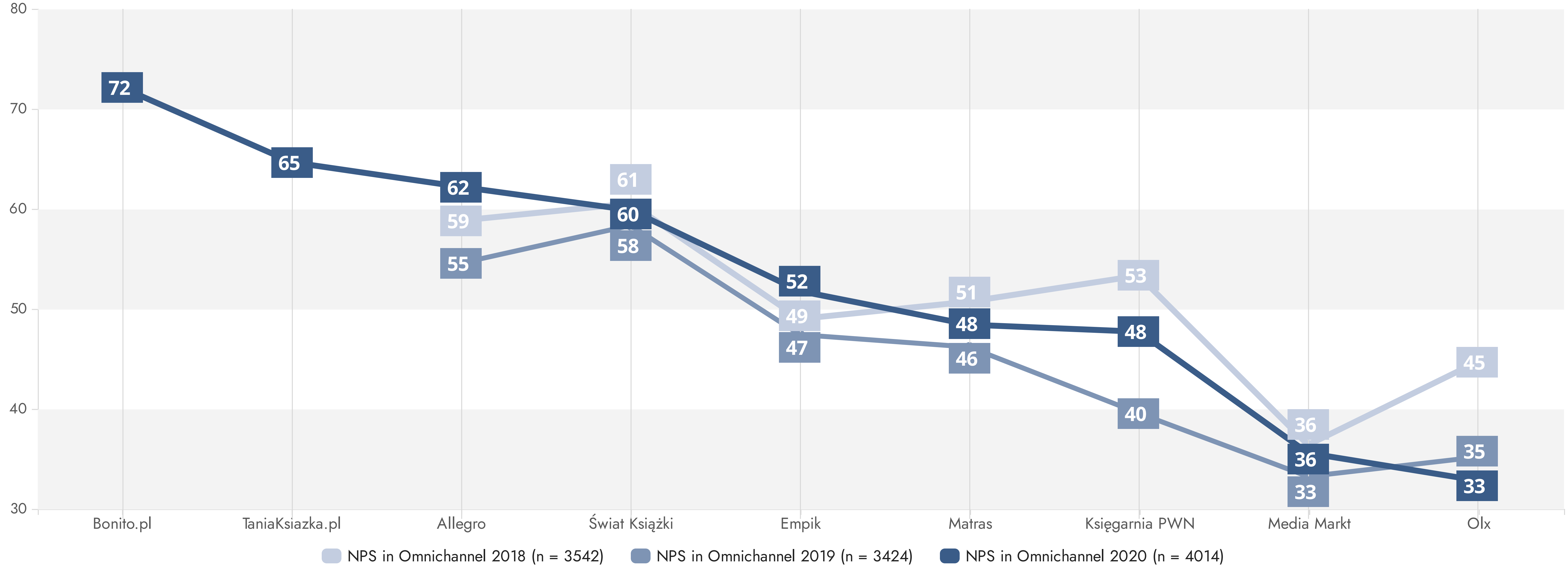




The charts show market shares depending on the sales channel and the value of Your Customer Experience Index. The Internet channel is dominated by Empik with the largest market share and Bonito.pl with the highest value of the index. In the fixed-line channel, Empik also has the largest share, but it is far from the leader (Bonito.pl) in the experience area.

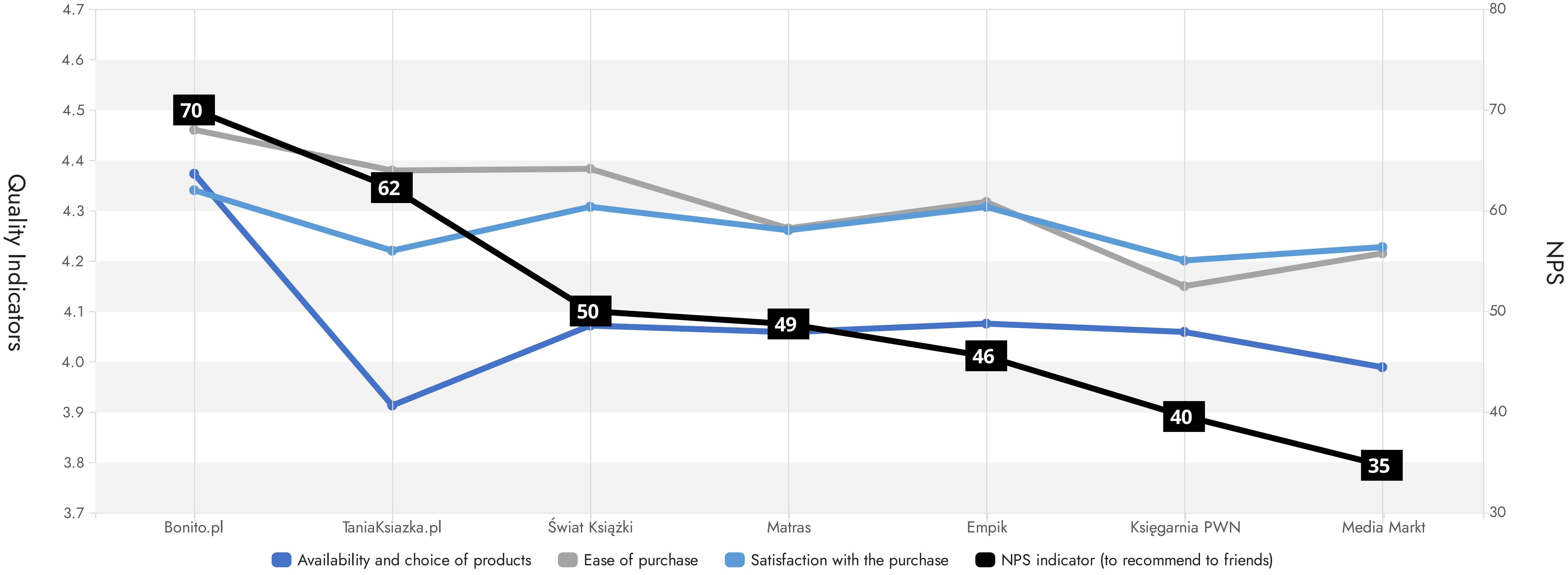
HOW LIKELY ARE YOU TO RECOMMEND THESE SHOPS TO YOUR FRIENDS?

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



TRADITIONAL CHANNEL - QUALITY ASSESSMENT OF EXPERIENCES

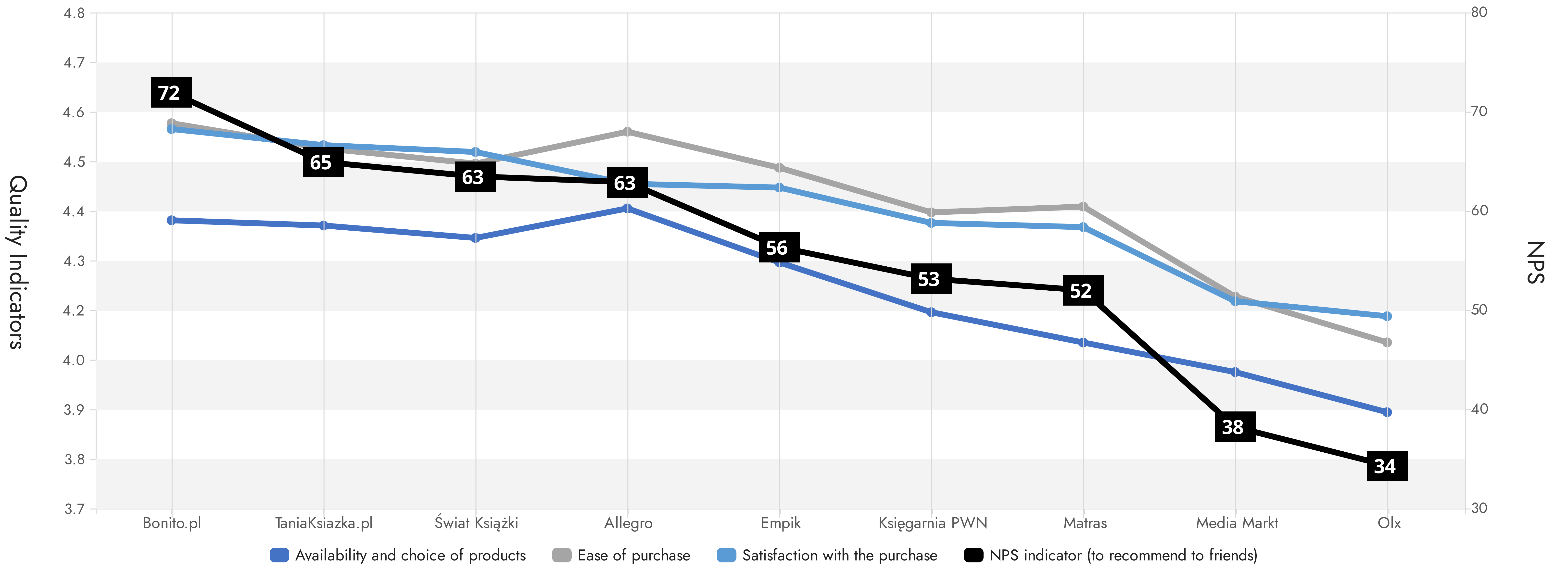
Quality ratings on a scale from 1 to 5 and NPS on a scale from -100 to 100



The highest NPS index in the traditional channel is recorded for Bonito.pl, Tania Książka, Świat Książki and Matras. The smallest selection is in Tania Książka.

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 Bonito.pl brand, where the high rating of ease of purchase is also correlated with the 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

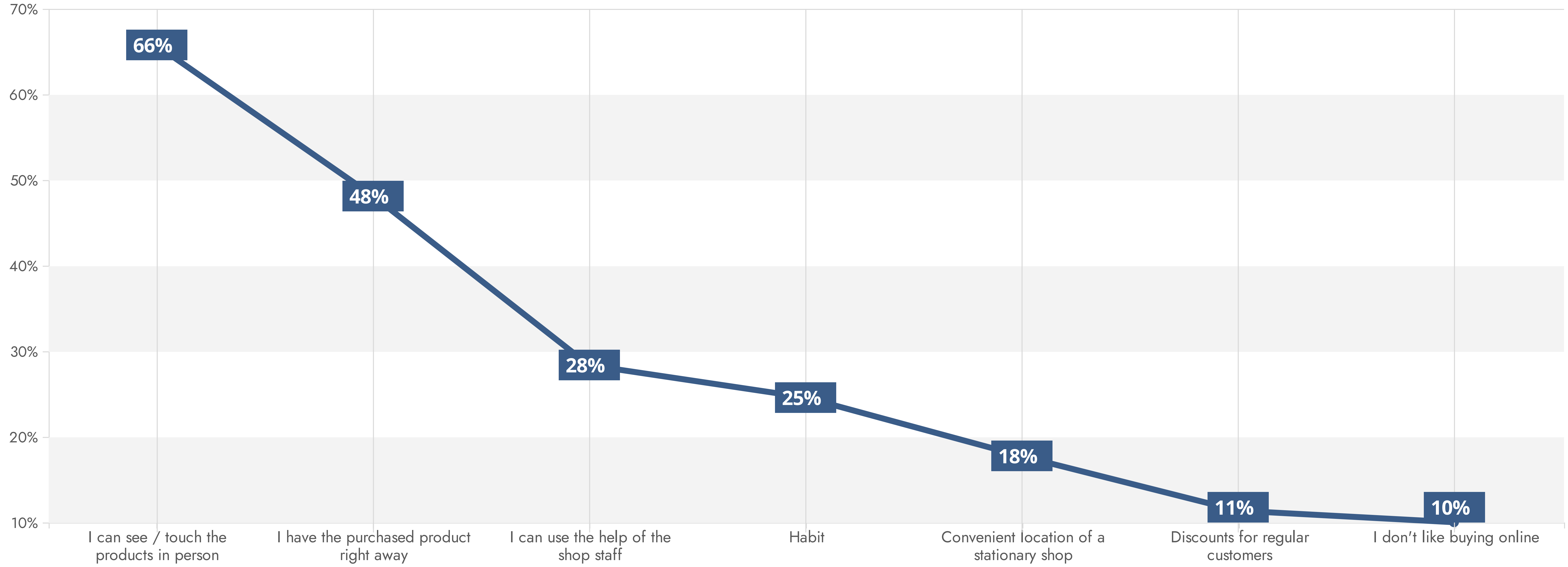
IDEACTO

SHOPPING PREFERENCES IN THE STATIONARY CHANNEL

WHY DO YOU PREFER TO BUY FILMS, BOOKS, MUSIC OR OTHER MULTIMEDIA IN A STATIONARY SHOP?

Traditional channel - Multiple choice question

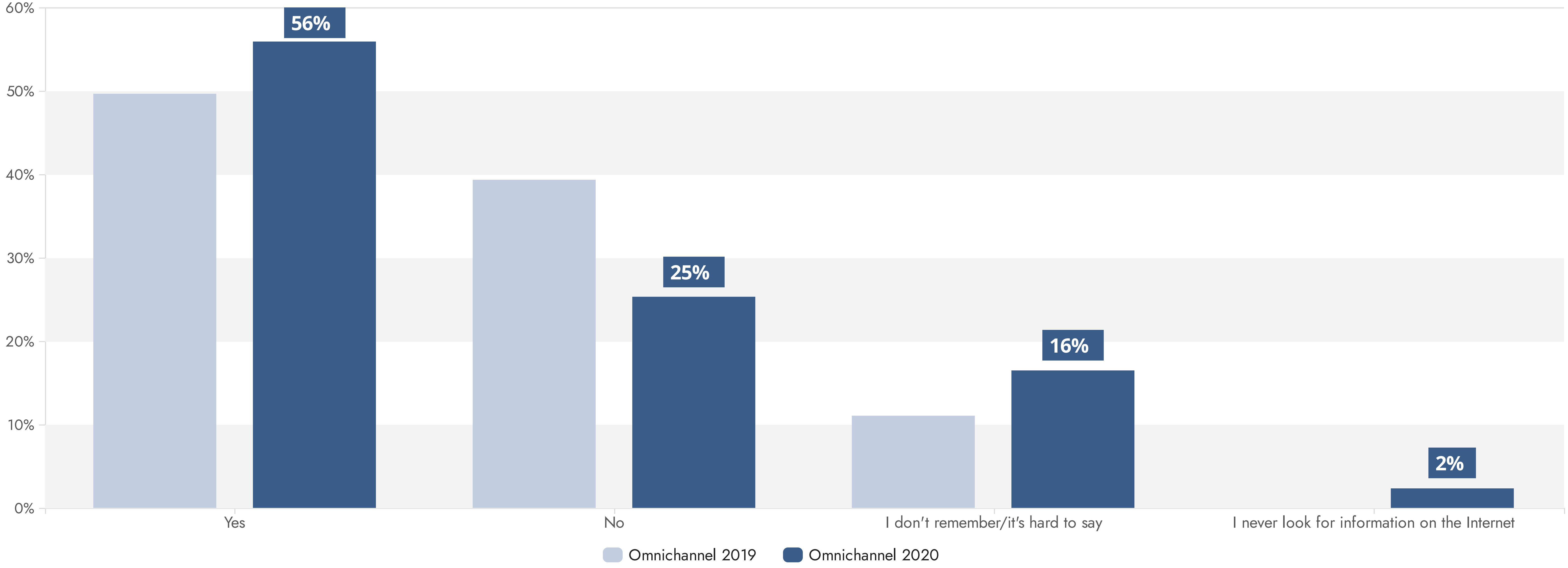
n = 1036



BEFORE THE LAST PURCHASE OF FILMS, BOOKS, MUSIC OR OTHER MULTIMEDIA IN A STATIONARY SHOP, DID YOU LOOK FOR INFORMATION ON THE INTERNET?

Traditional channel - Multiple choice question

n = 814

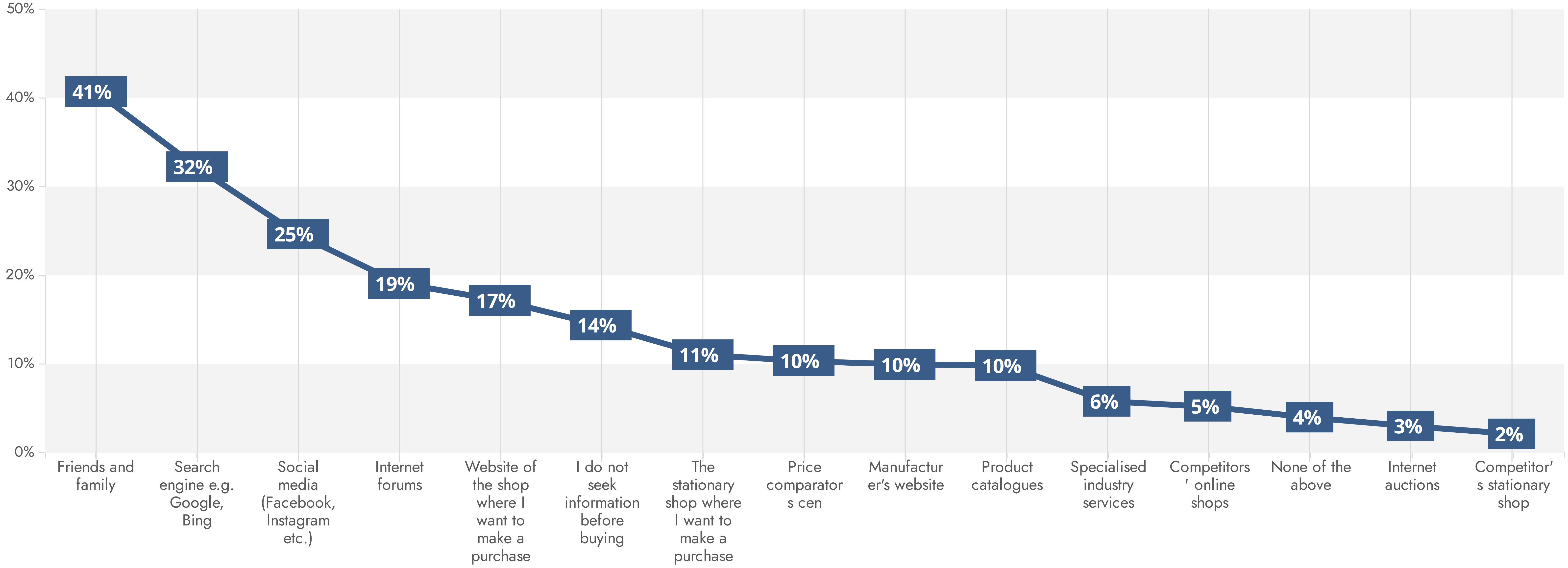


We can clearly see a decrease in the proportion of people who do not look online for product information, opinions or comparisons before making a purchase.

FROM WHERE DO YOU OBTAIN INFORMATION ABOUT FILMS, BOOKS, MUSIC OR OTHER MULTIMEDIA BEFORE PURCHASE?

Traditional channel - Multiple choice question

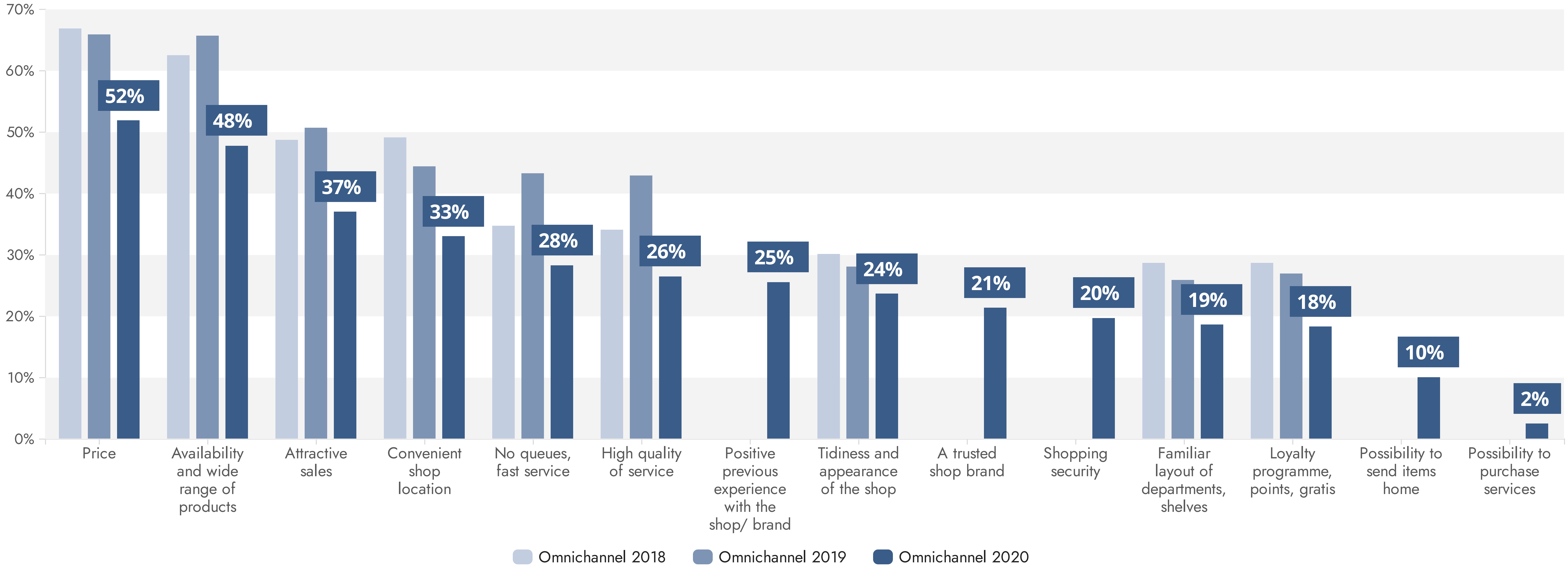
n = 818



WHAT IS MOST IMPORTANT TO YOU WHEN SHOPPING FOR FILMS, BOOKS, MUSIC OR OTHER MULTIMEDIA IN A STATIONARY SHOP?

Traditional channel - Multiple choice question

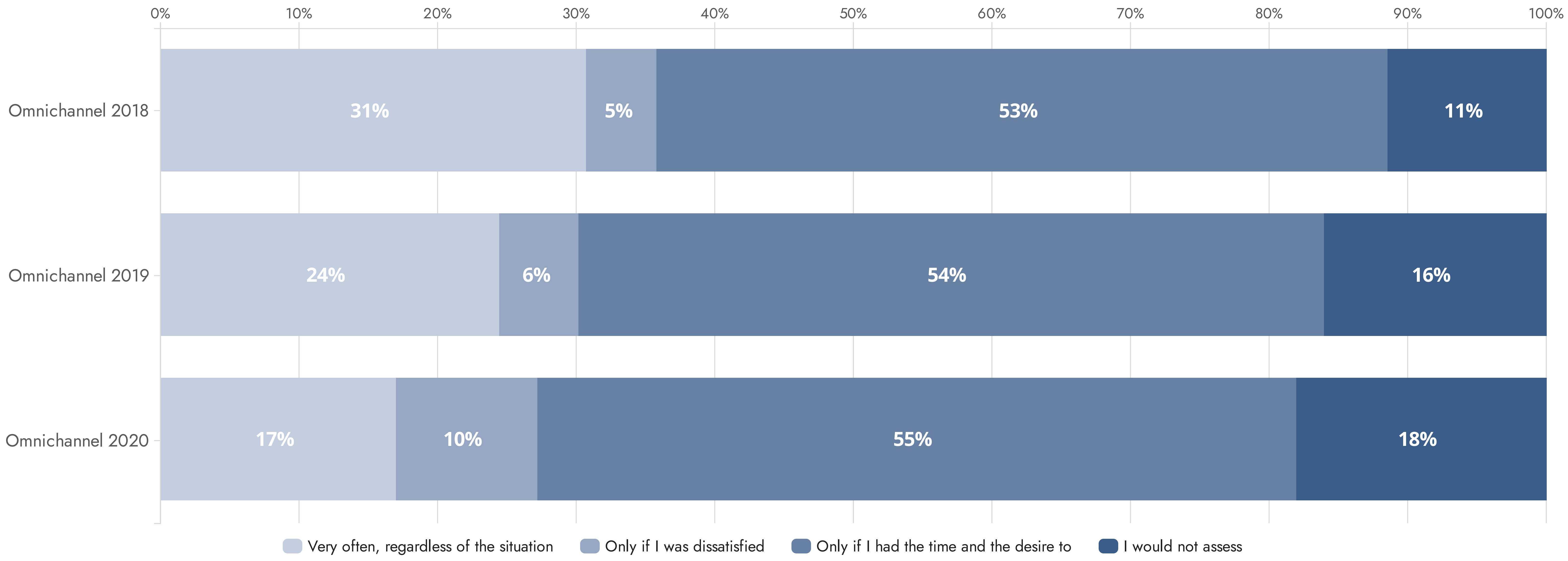
n = 652



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

Traditional channel - Single choice question

n = 725

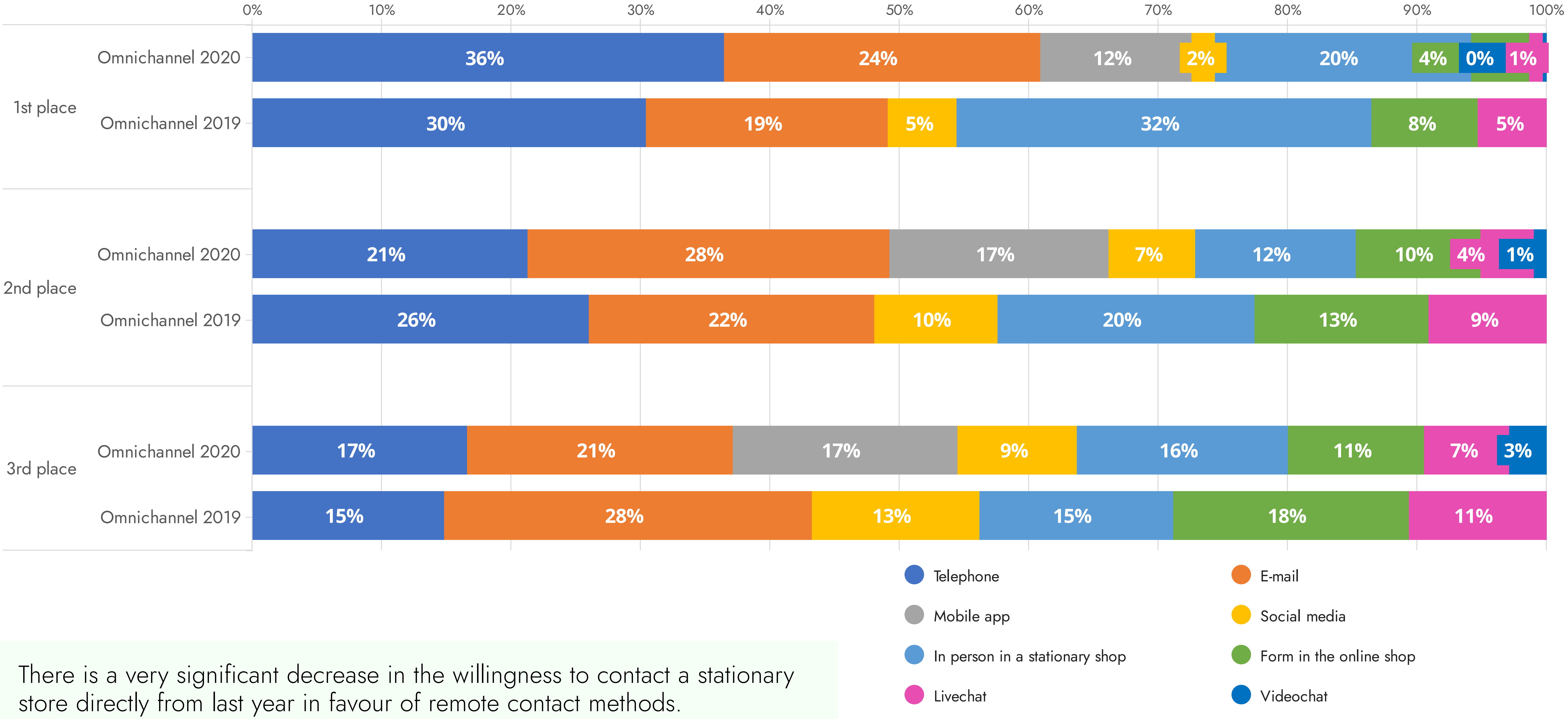


Only 18% of respondents say a strong 'No' to sharing their opinions and shopping experiences, which means that many people want to pass on their insights to others, but do not always have the opportunity to do so.

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 = 583



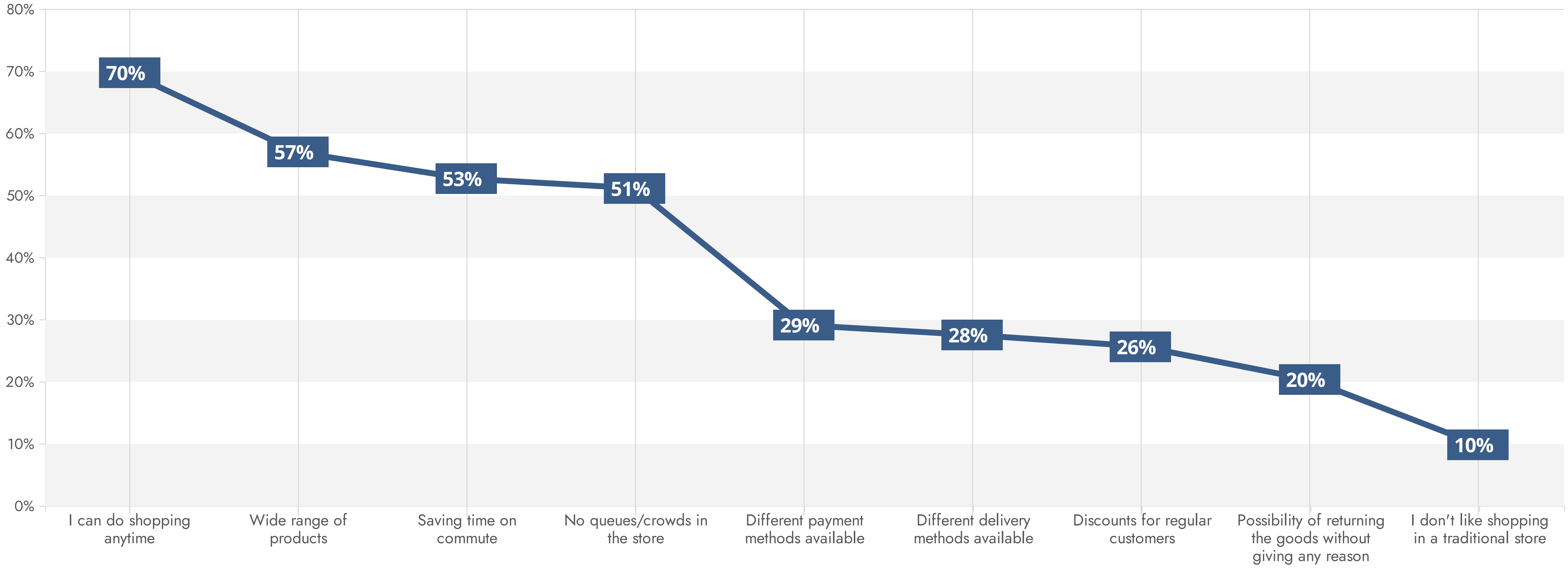
There is a very significant decrease in the willingness to contact a stationary store directly from last year in favour of remote contact methods.

SHOPPING PREFERENCES ON THE INTERNET CHANNEL

WHY DO YOU PREFER TO BUY FILMS, BOOKS, MUSIC OR OTHER MULTIMEDIA IN AN ONLINE SHOP?

Internet channel - Multiple choice question

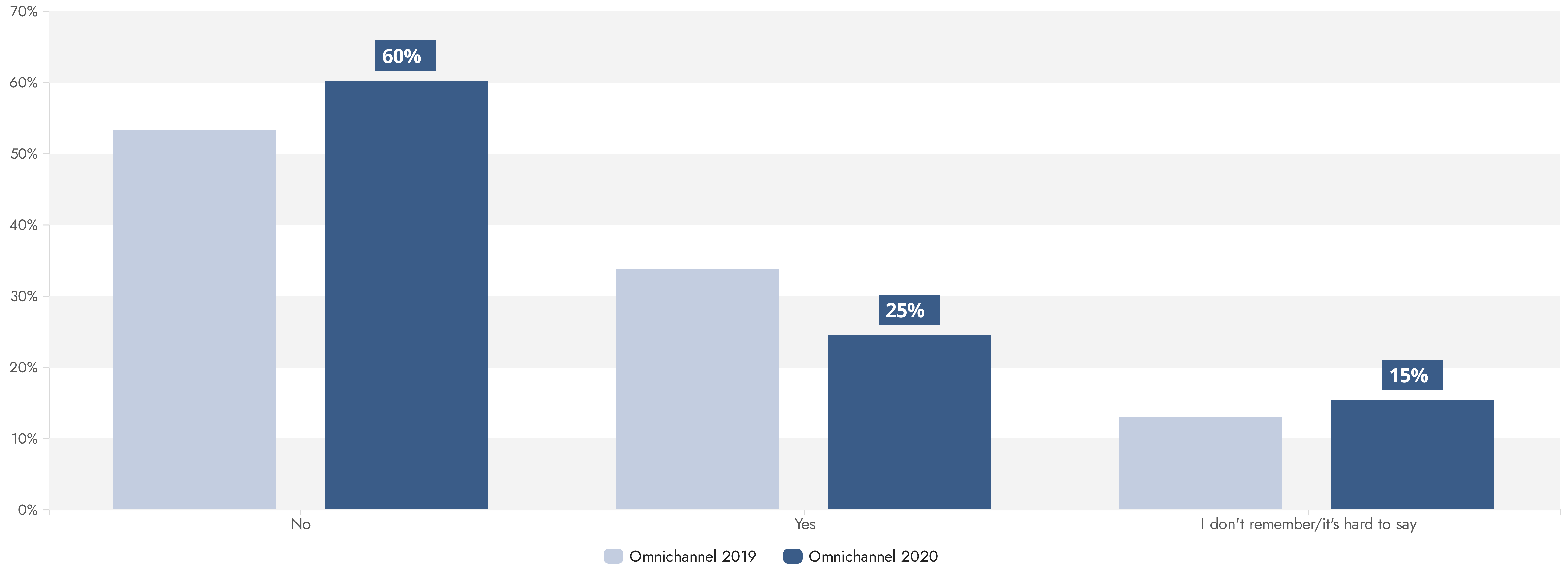
n = 1789



BEFORE THE LAST PURCHASE OF FILMS, BOOKS, MUSIC OR OTHER MULTIMEDIA IN AN ONLINE SHOP, DID YOU VISIT THE STATIONARY SHOPS TO GET ACQUAINTED WITH THE PRODUCT?

Internet channel - Multiple choice question

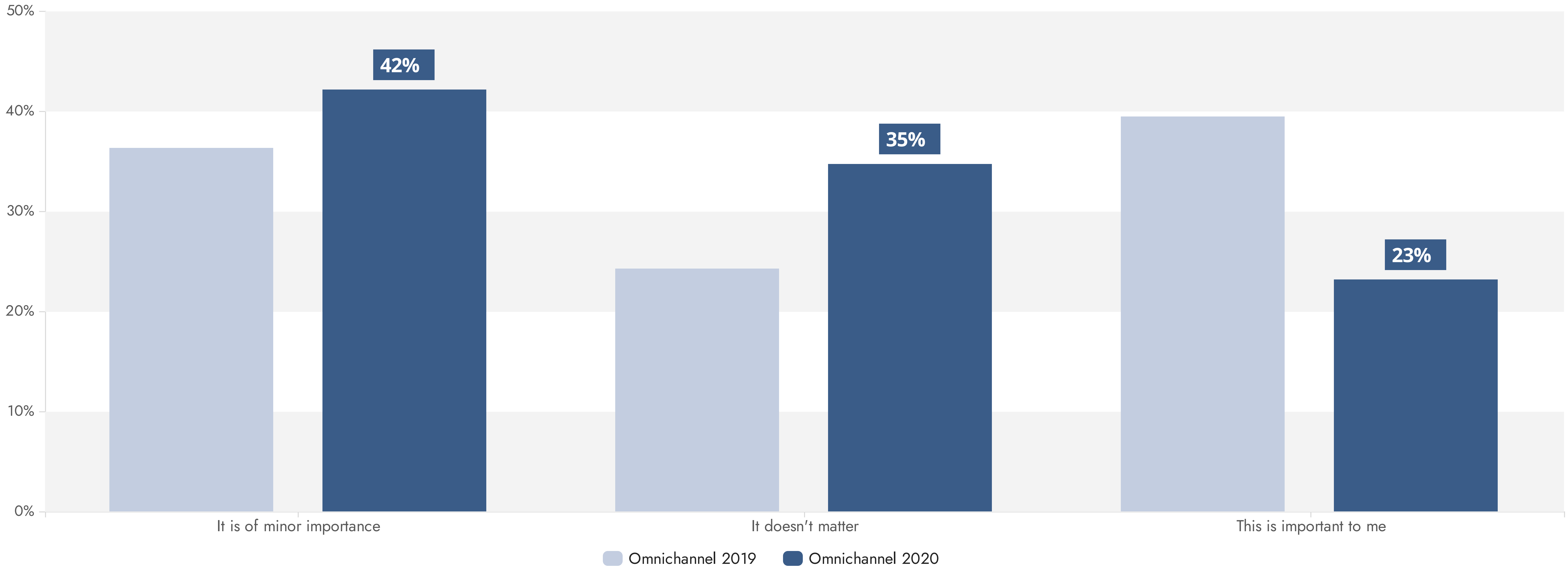
n = 2380



WHEN PLANNING ONLINE SHOPPING FOR FILMS, BOOKS, MUSIC OR OTHER MULTIMEDIA, DO YOU TAKE INTO CONSIDERATION THE PRESENCE OF A

Internet channel - Multiple choice question

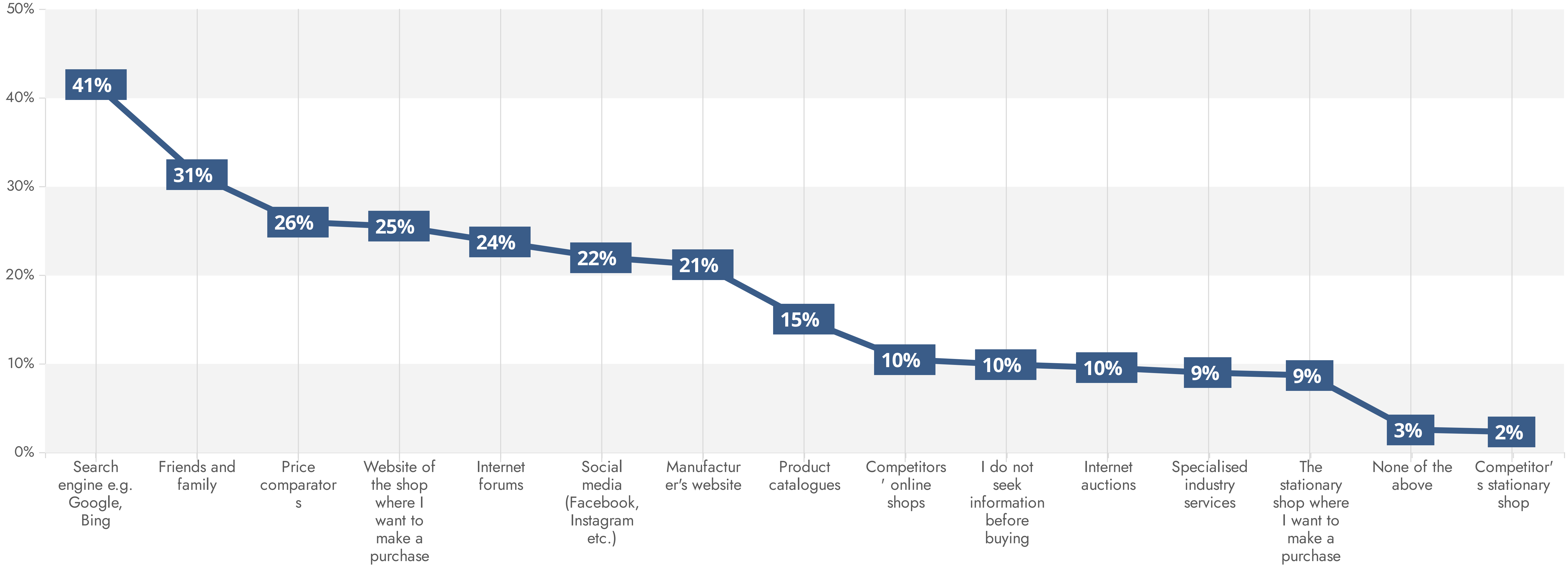
n = 2271



WHERE DO YOU OBTAIN PRODUCT INFORMATION BEFORE PURCHASE?

Internet channel - Multiple choice question

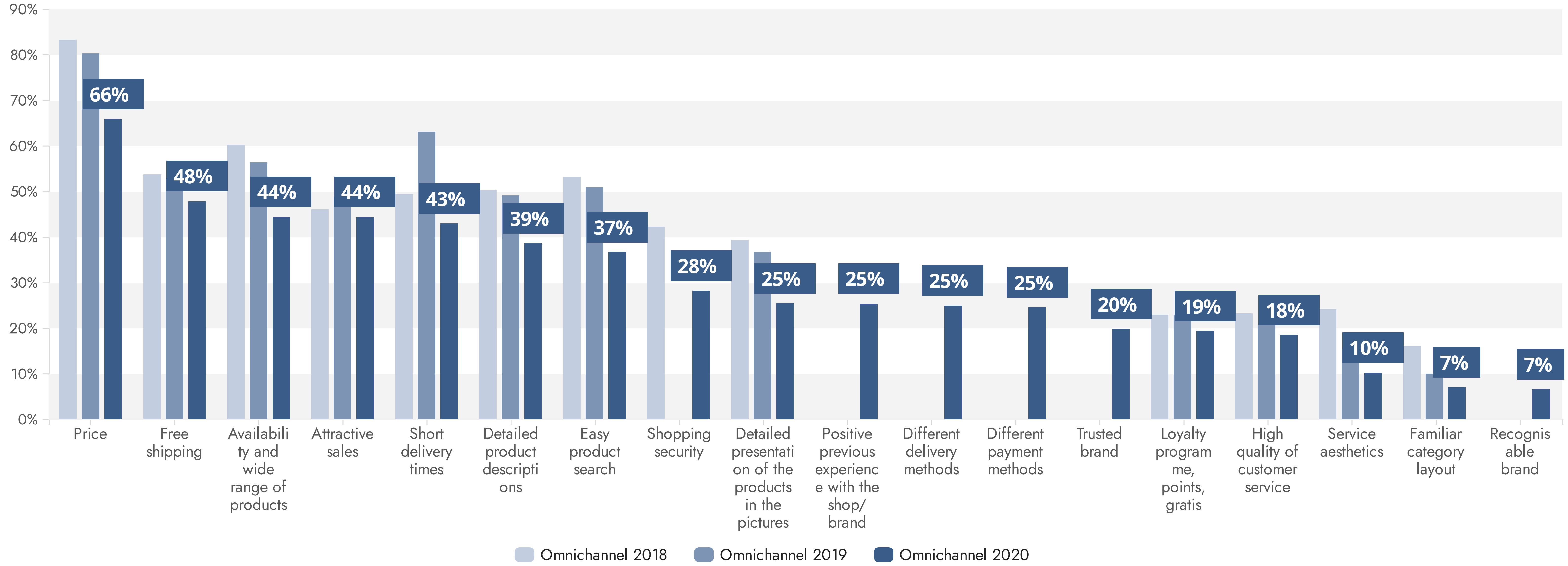
n = 2352



WHAT IS THE MOST IMPORTANT THING FOR YOU WHEN SHOPPING FOR FILMS, BOOKS, MUSIC OR OTHER MULTIMEDIA ONLINE?

Internet channel - Multiple choice question

n = 1885

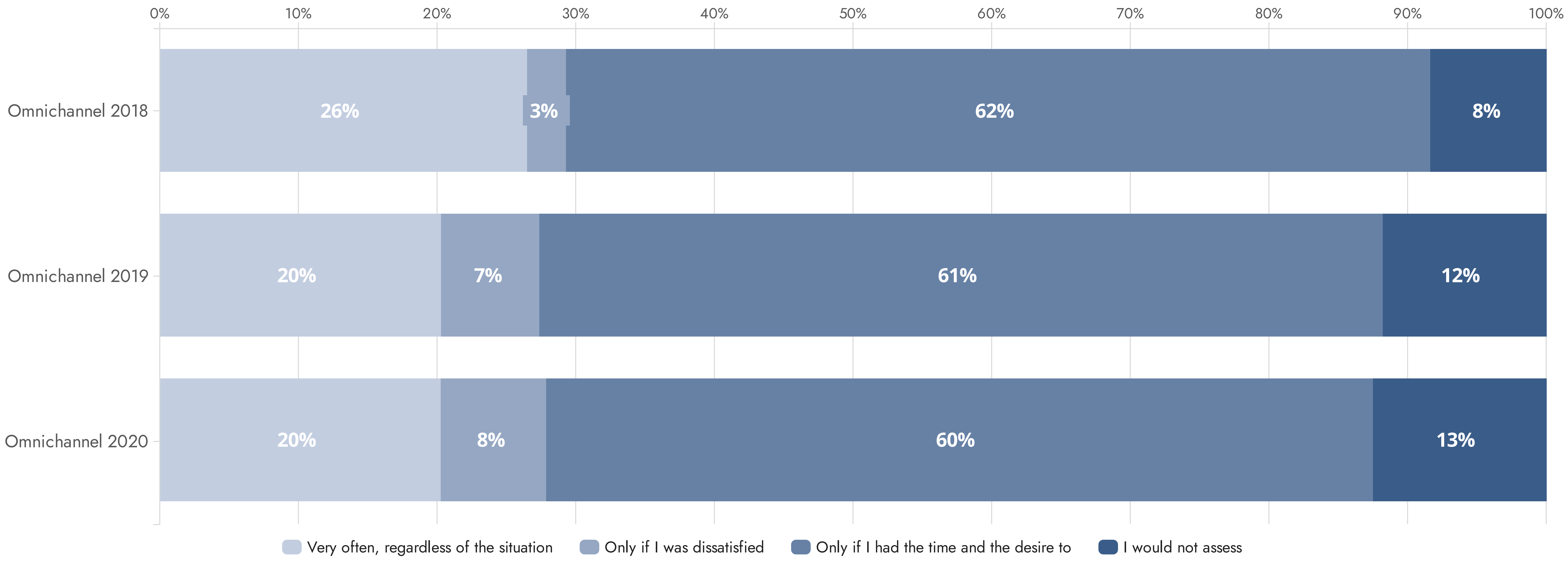


The price of the product is no longer so important for the customer from year to year, all accompanying circumstances, such as the cost of delivery or lack of delivery or a wide range of products are becoming increasingly important.

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

Internet channel - Single-choice question

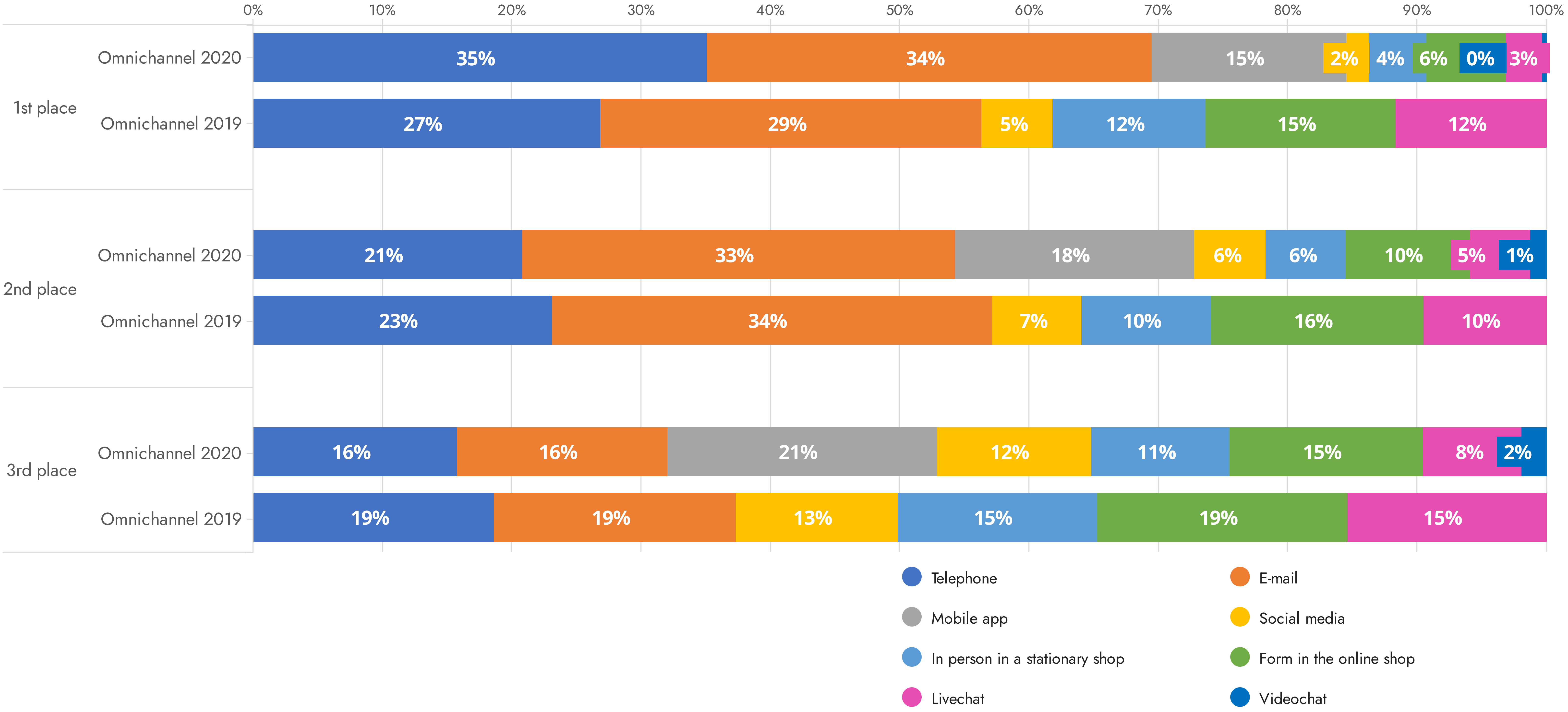
n = 3840



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 = 1684

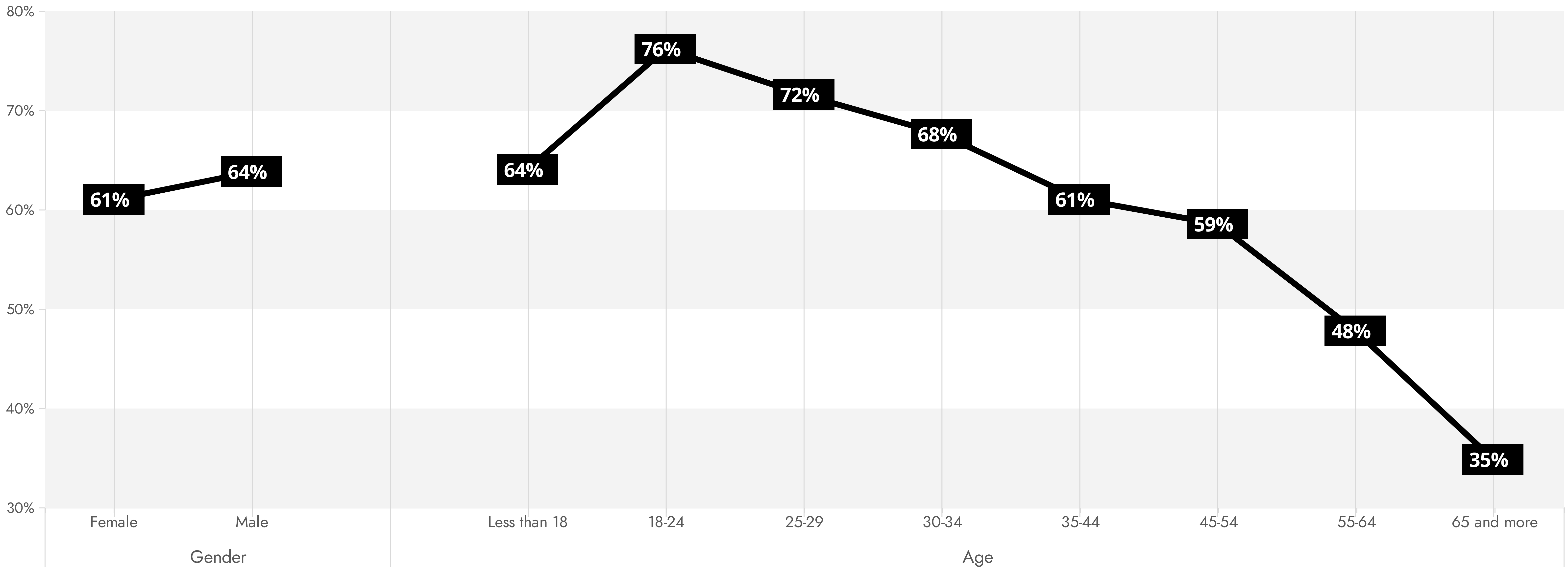


PURCHASE PREFERENCES IN THE SUBSCRIPTION MODEL

DO YOU USE PLATFORMS THAT PROVIDE ELECTRONIC OR SUBSCRIPTION-BASED ACCESS TO FILMS, SERIES, BOOKS, MUSIC OR OTHER MULTIMEDIA? - SHARE OF USERS

Single-choice question

n = 4067

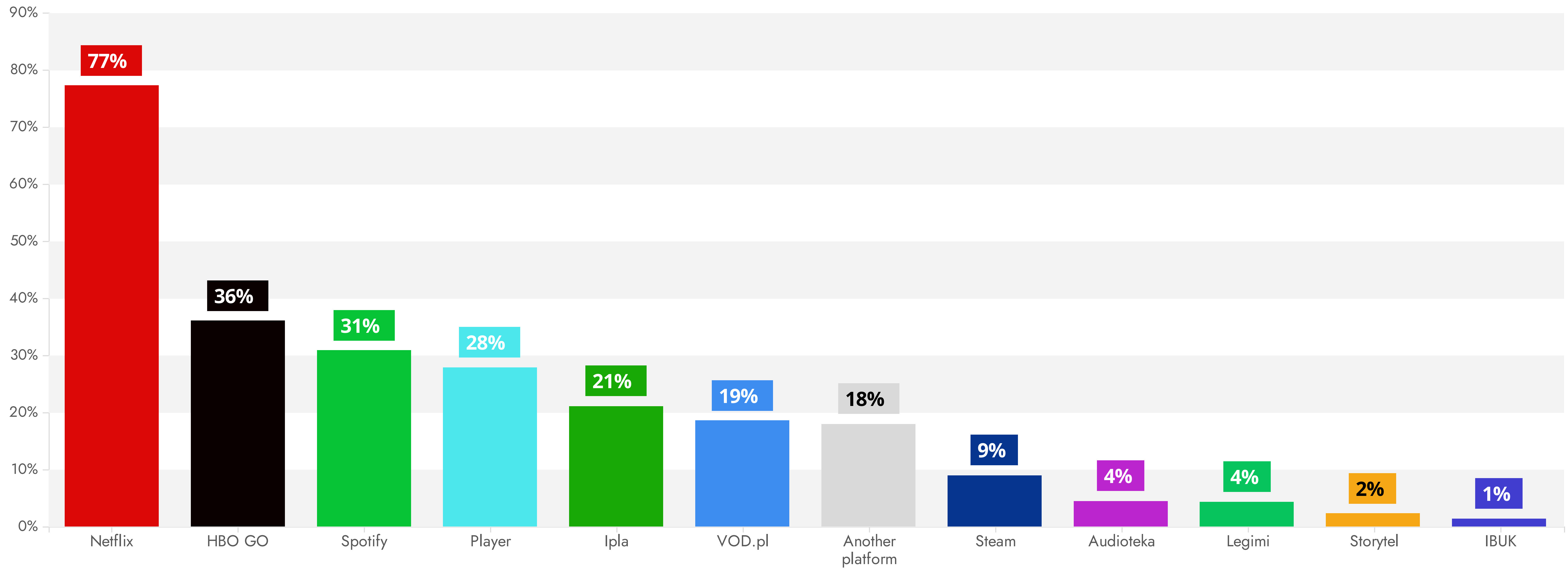


We already know that the segment of platforms providing various types of content is growing in strength. There are no major differences between men and women in their use. Noteworthy is the share of young users (18-29 years old), almost 3/4 of whom actively use various platforms. As they grow older, the share of those using various types of subscription services decreases.

WHICH PLATFORMS DO YOU USE?

Multiple choice question

n = 2438

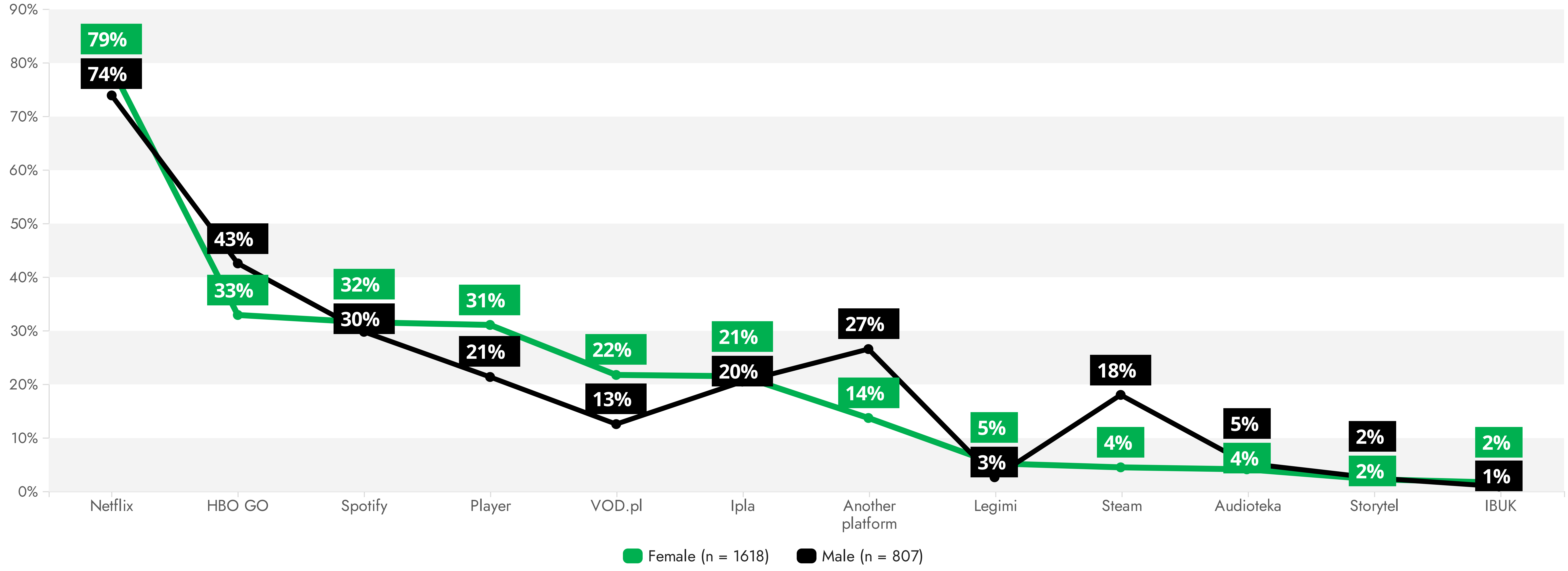


Platforms that provide access to films and series are most popular among respondents. Netflix, which is the market leader, received the highest number of indications. Every third respondent uses HBO GO and Spotify, which is the leader among services providing music. The lowest interest among the respondents is shown in the book sharing platforms.

WHICH PLATFORMS DO YOU USE?

Analysis by gender

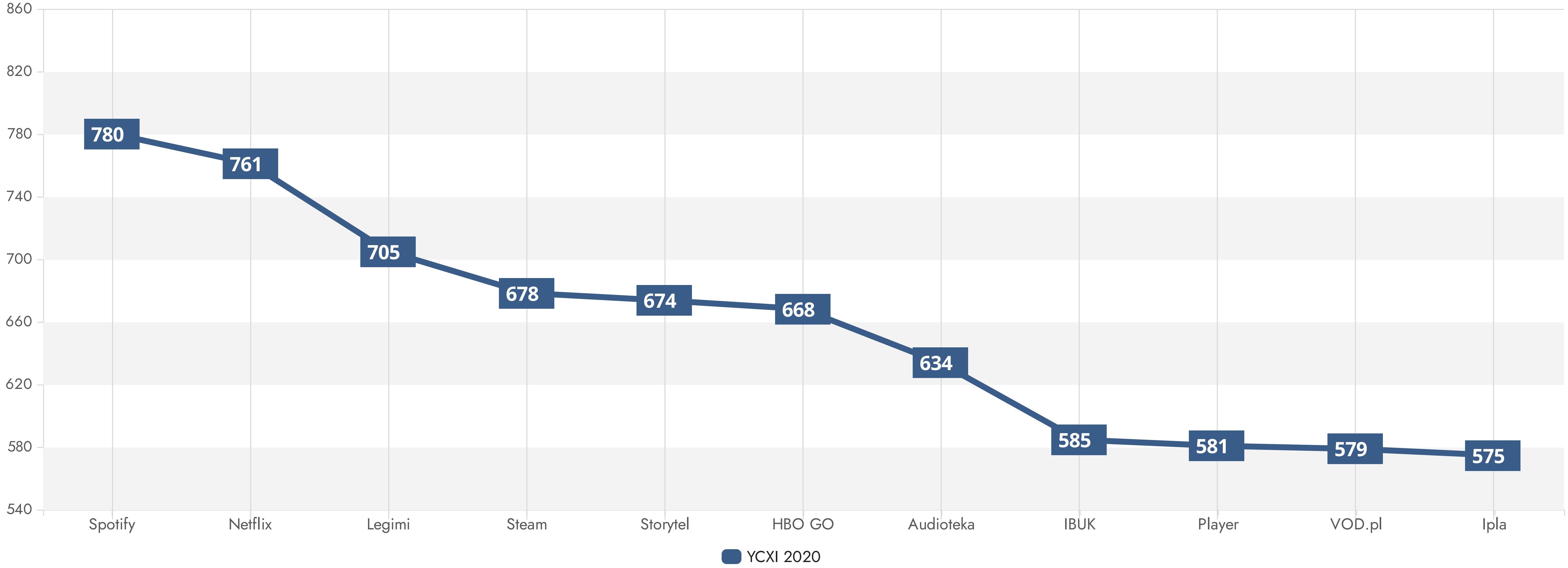
n = 2425



Women are more likely to use video and series platforms than men, while men are more likely to use services that provide video games or other niche services. However, regardless of gender, Netflix is most popular.

YOUR CUSTOMER EXPERIENCE INDEX

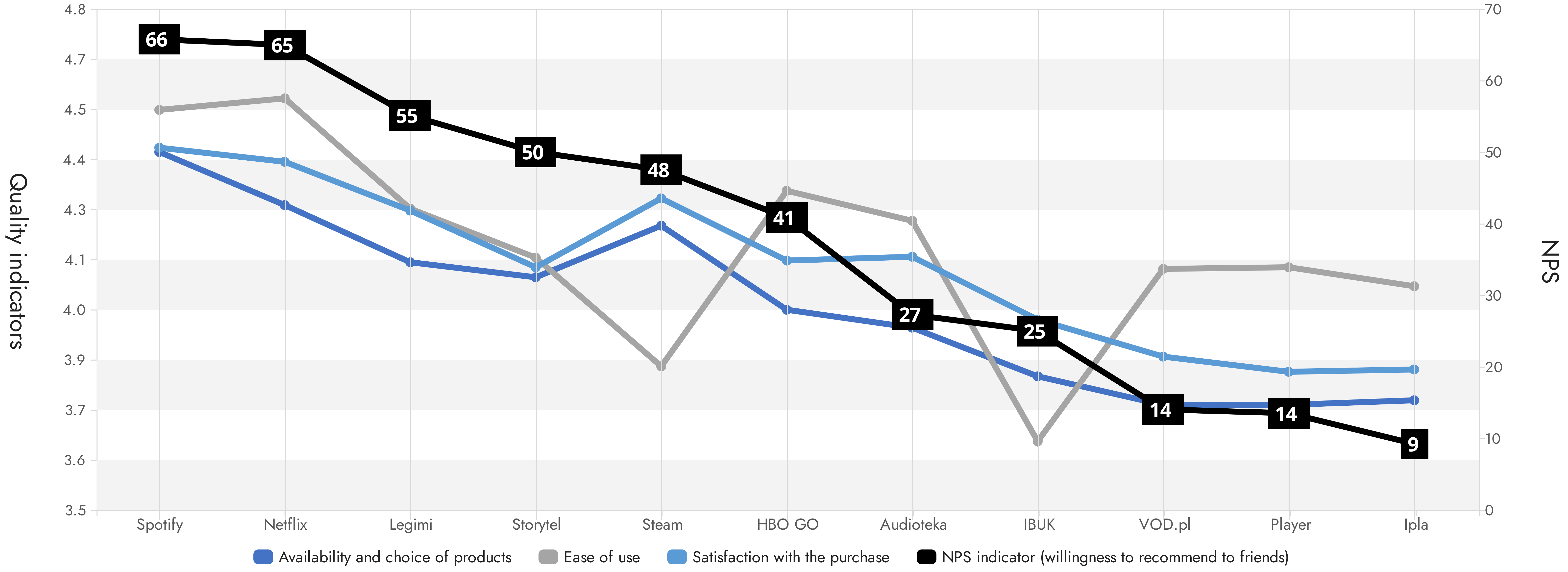
Quality indicator on a scale from 0 to 1000 taking into account four satisfaction factors:
availability and scope of the offer, ease of use of the platform, satisfaction with the purchase, willingness to recommend the platform to friends



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 of work to be done if companies have achieved results around two thirds of the possible points. Industry leaders with scores above 700 points are Spotify, Netflix and Legimi.

EVALUATION OF THE QUALITY OF EXPERIENCES

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

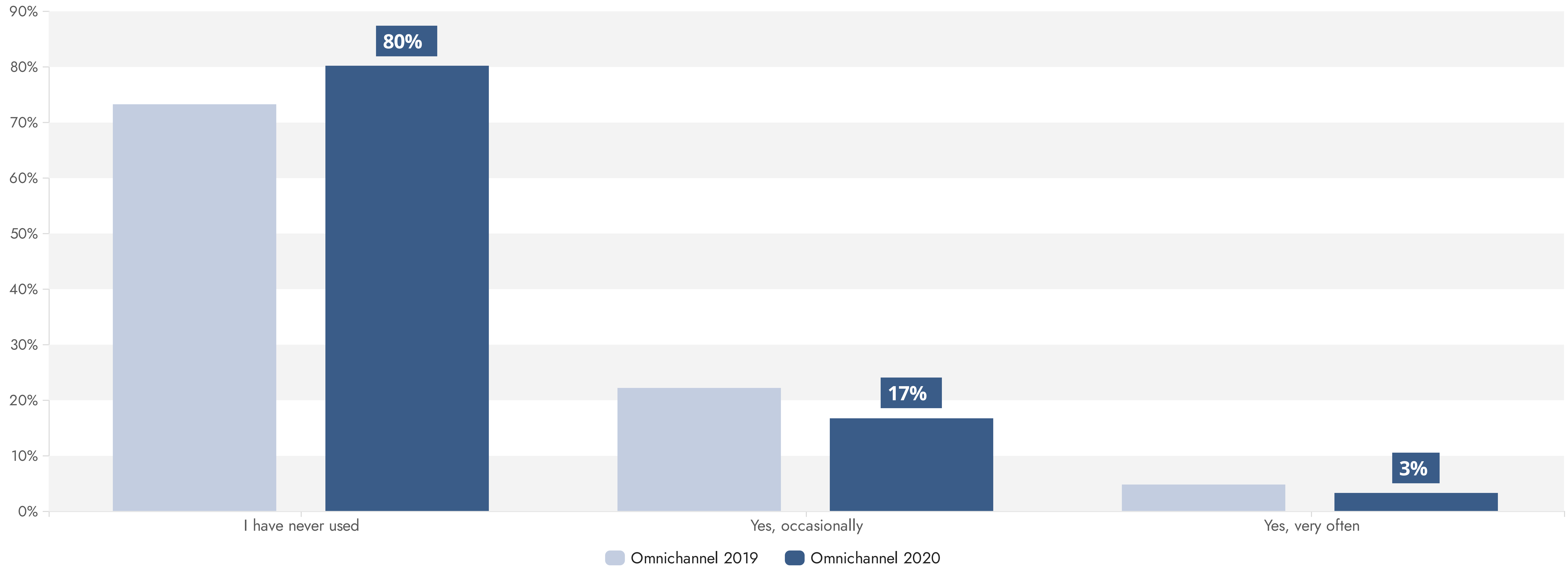


The highest NPS ratio in the traditional channel is recorded for Spotify, Netflix and Legimi. The lowest ratings were given to Polish platforms providing movies and series - Ipla, Player and VOD.pl.

DO YOU USE OR HAVE YOU EVER USED ILLEGAL CHANNELS TO DOWNLOAD MULTIMEDIA?

Single-choice question

n = 4175

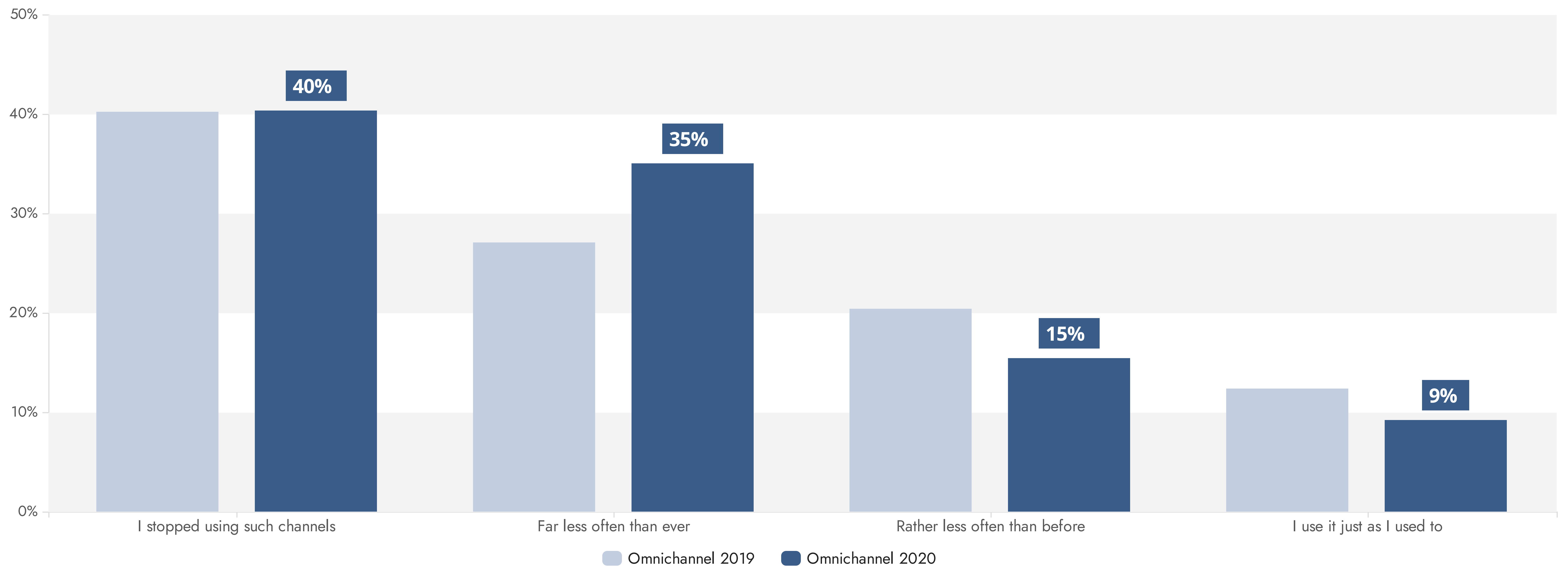


Compared to Omnichannel 2019 results, the share of respondents who use illegal channels to download media is decreasing.

HAS EASIER ACCESS TO DIGITAL MULTIMEDIA MEANT THAT YOU ARE LESS LIKELY TO USE ILLEGAL CHANNELS TODAY?

Single-choice question

n = 771



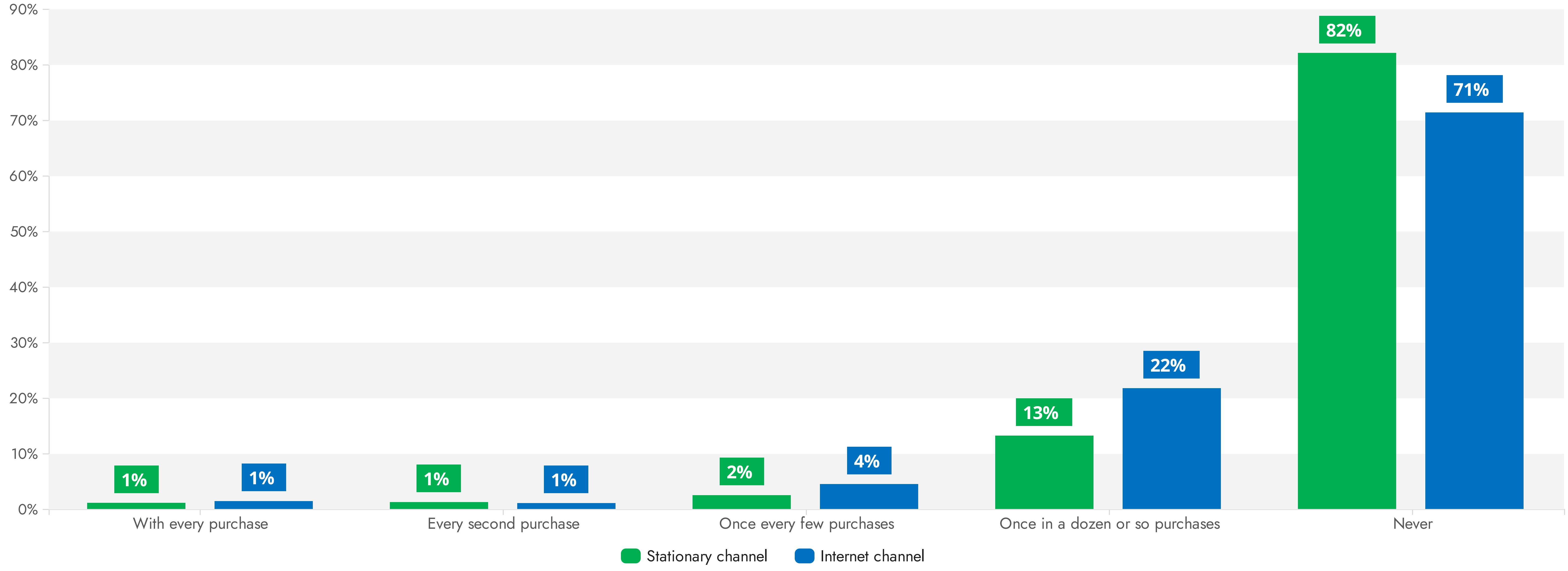
Compared to Omnichannel 2019 results, the share of respondents who use illegal media download sources less frequently or not at all is increasing.

POST-PURCHASE EXPERIENCE

HOW OFTEN DO YOU RETURN FILMS, BOOKS, MUSIC OR OTHER MEDIA (COMPLAINT / RETURN / EXCHANGE)?

Single-choice question

n = 2554

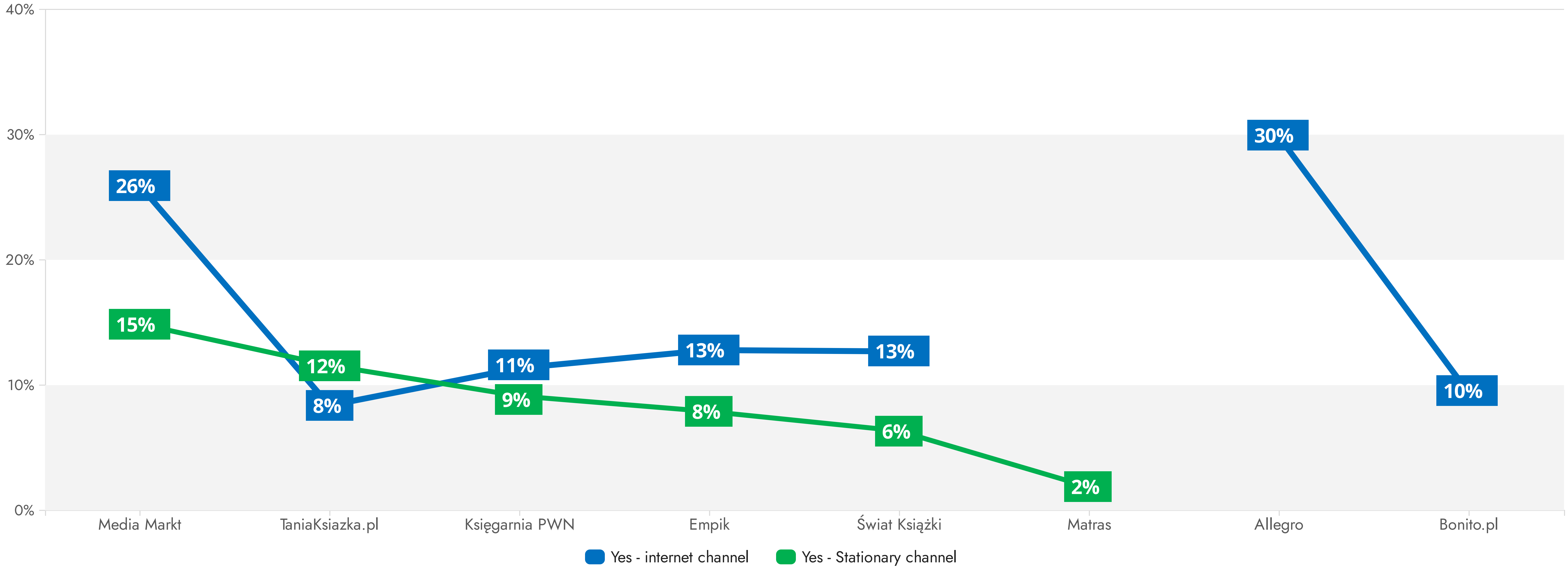


We already know that the e-commerce segment is growing in strength, but it should be noted that the share of returns of purchased products in this channel is greater than in traditional sales, which in turn is associated with the increased work of after-sales service.

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

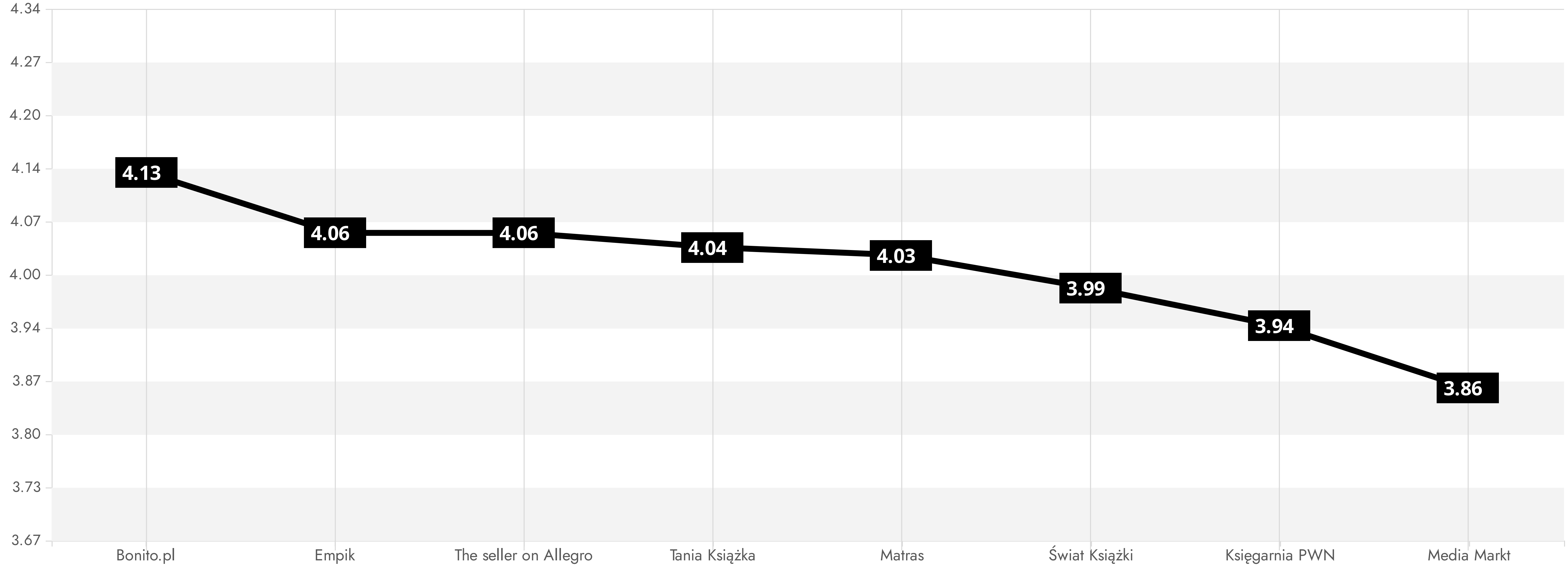
n Internet channel = 1939, n fixed channel = 816



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

Evaluation on a scale of 1 to 5

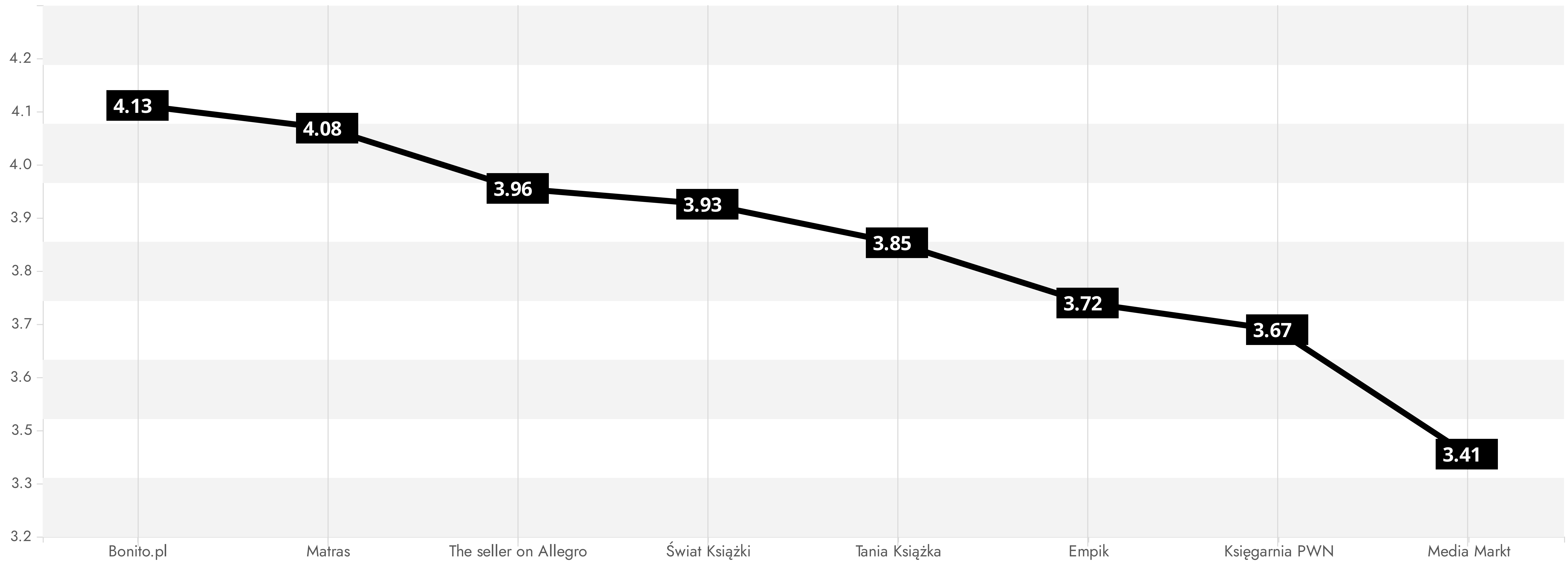
n = 1363



CONTACT ASSESSMENT WITH THE CUSTOMER SERVICE DEPARTMENT - CALL WAITING TIME

Evaluation on a scale of 1 to 5

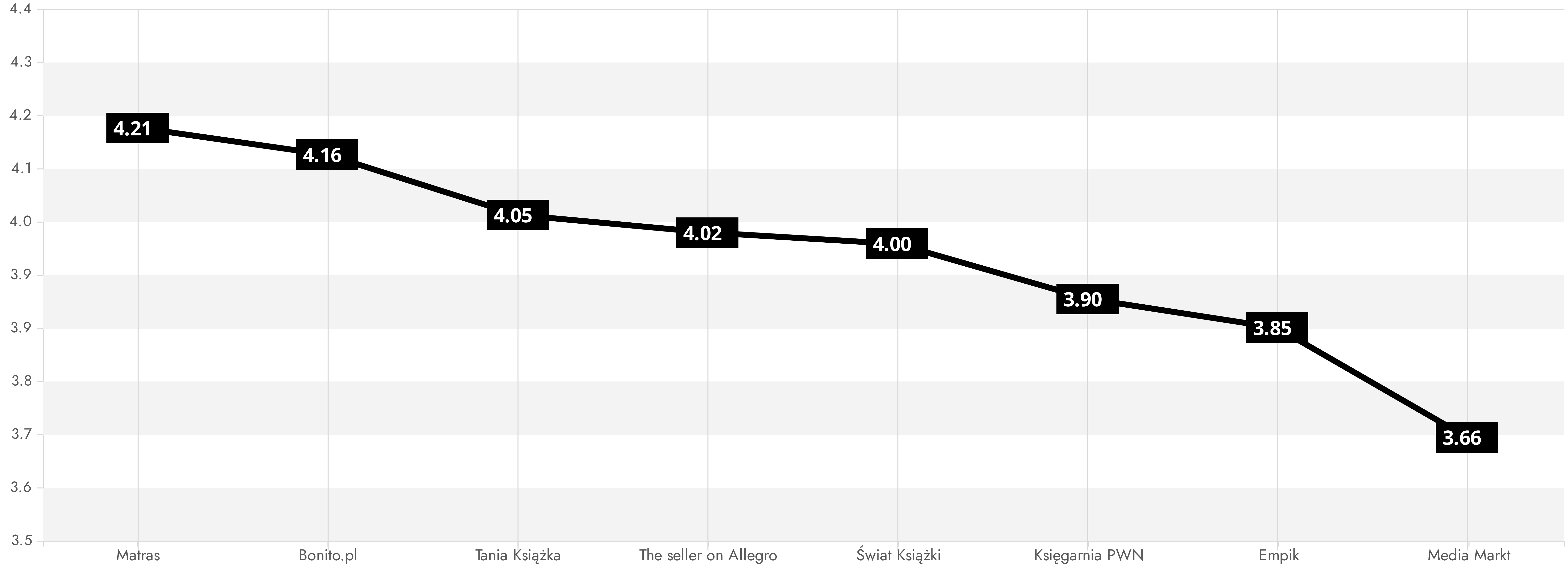
n = 1294



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

Evaluation on a scale of 1 to 5

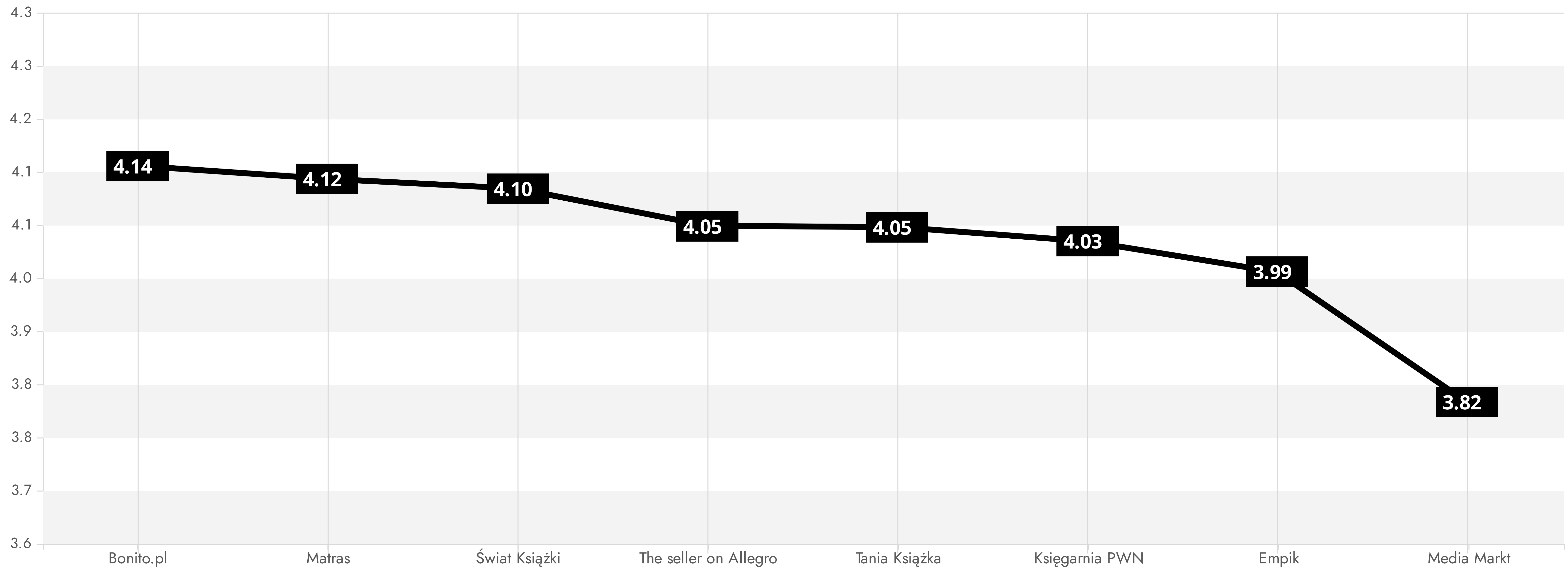
n = 1297



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

Evaluation on a scale of 1 to 5

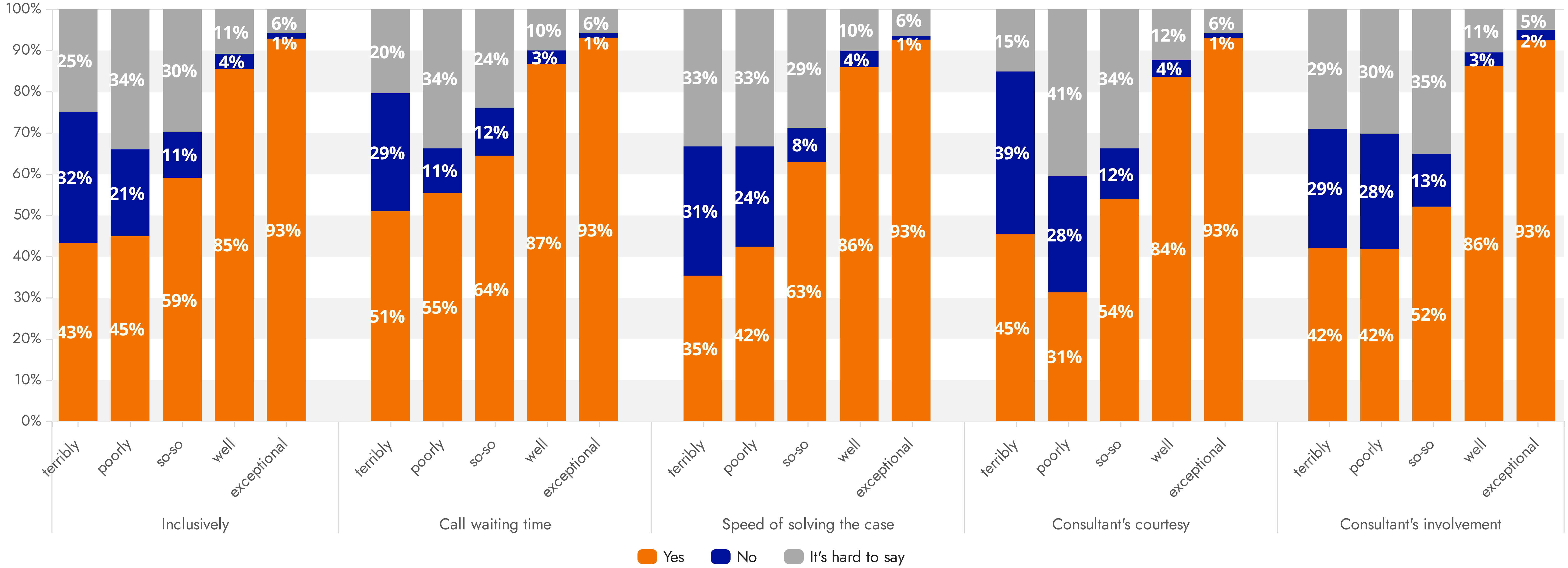
n = 1281



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 (terribly and poory assessments) on the reluctance to reuse the offer of a given brand. The strongest influence in the case of a terrible assessment is, in turn, the waiting time for a call, consultant's courtesy, consultant's involvement and the speed of solving the case. This means that the most important thing is to quickly connect and talk to a polite consultant.

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

8

We have researched eight product segments


Cinemas

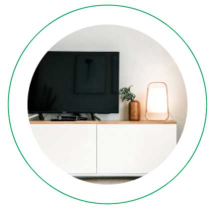

Clothing


Drugstores


Shoes


Telecommunications


Home and Garden


Electronics and home appliances


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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