YourCX

REPORT

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2020

REPORT

OMNI CHANNEL 2020

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

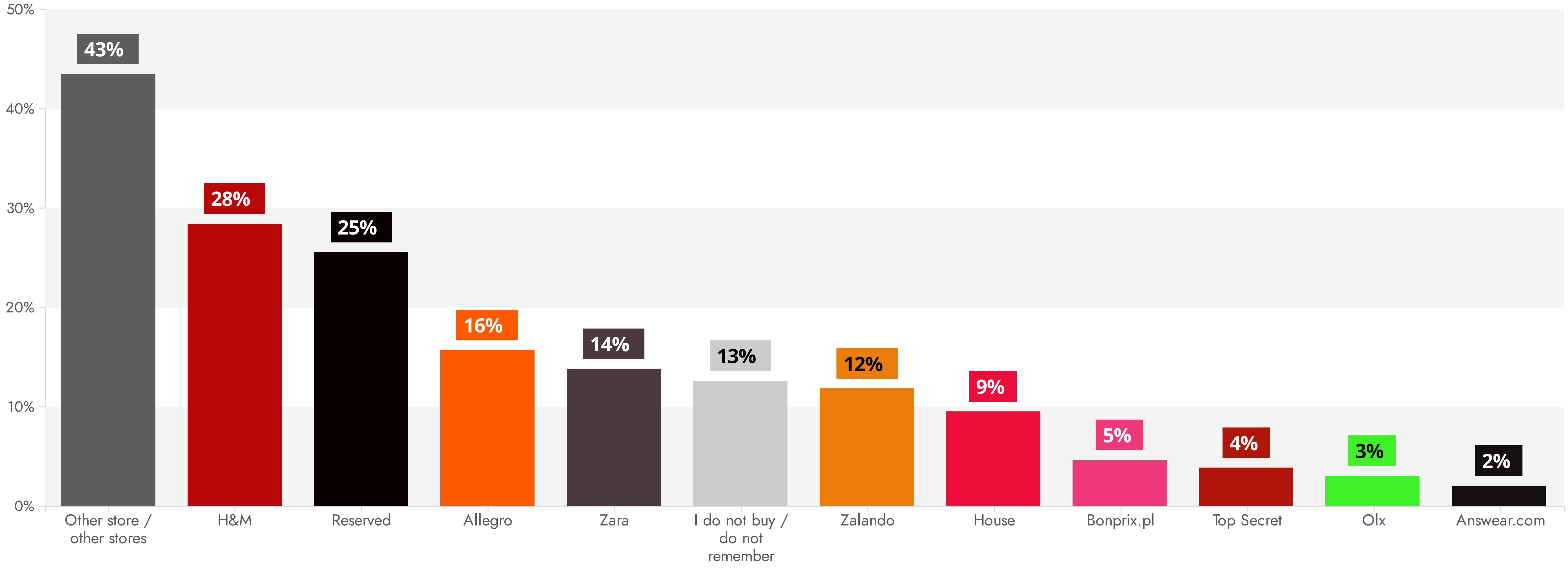
CALCULATION EXAMPLES FOR COMPANY XYZ

	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 CLOTHES?

Multiple choice question

n = 6656

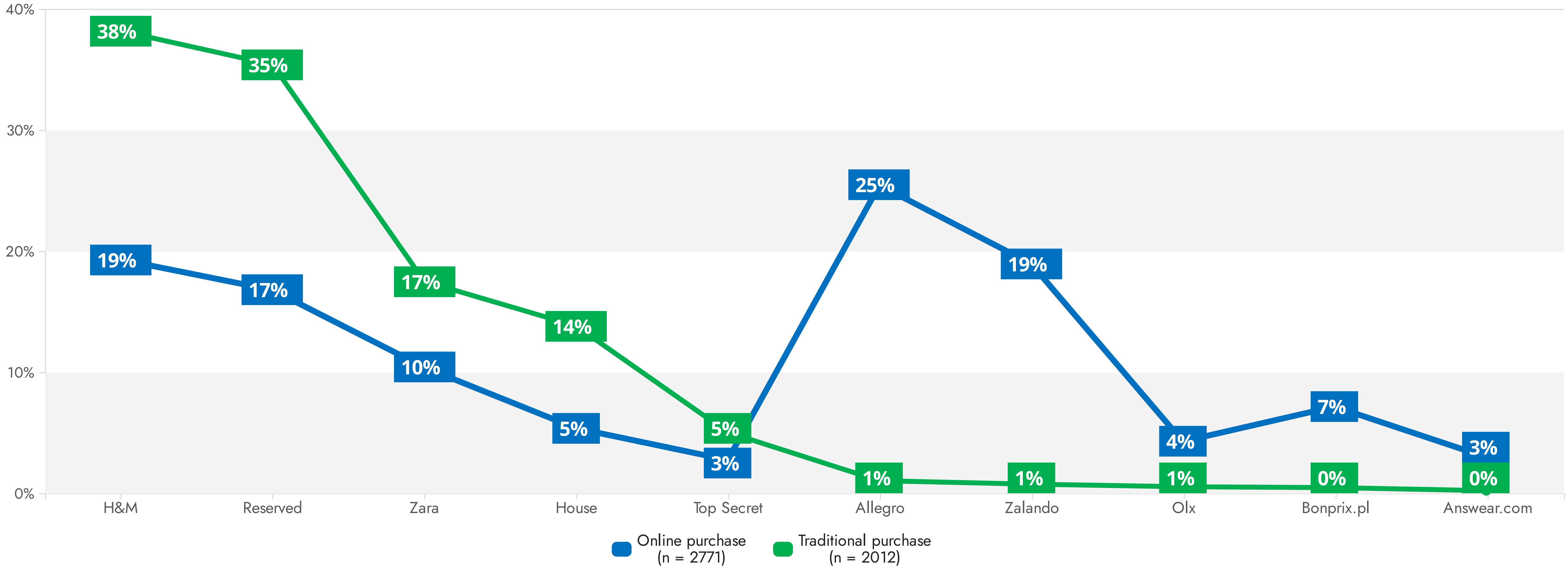


There is no clear leadership in the clothing industry as the industry is highly dispersed. Over 40% of the respondents buy clothes and accessories in shops which were not included in the survey. Almost 30% of the respondents indicated H&M, which has an extensive network of stationary sales. There were few fewer indications for Reserved. The results are aggregate for all shopping channels (including online and traditional shopping).

WHERE HAVE YOU RECENTLY BOUGHT CLOTHES?

Market shares by purchasing channel

n = 2771 online purchase, 2012 stationary purchase

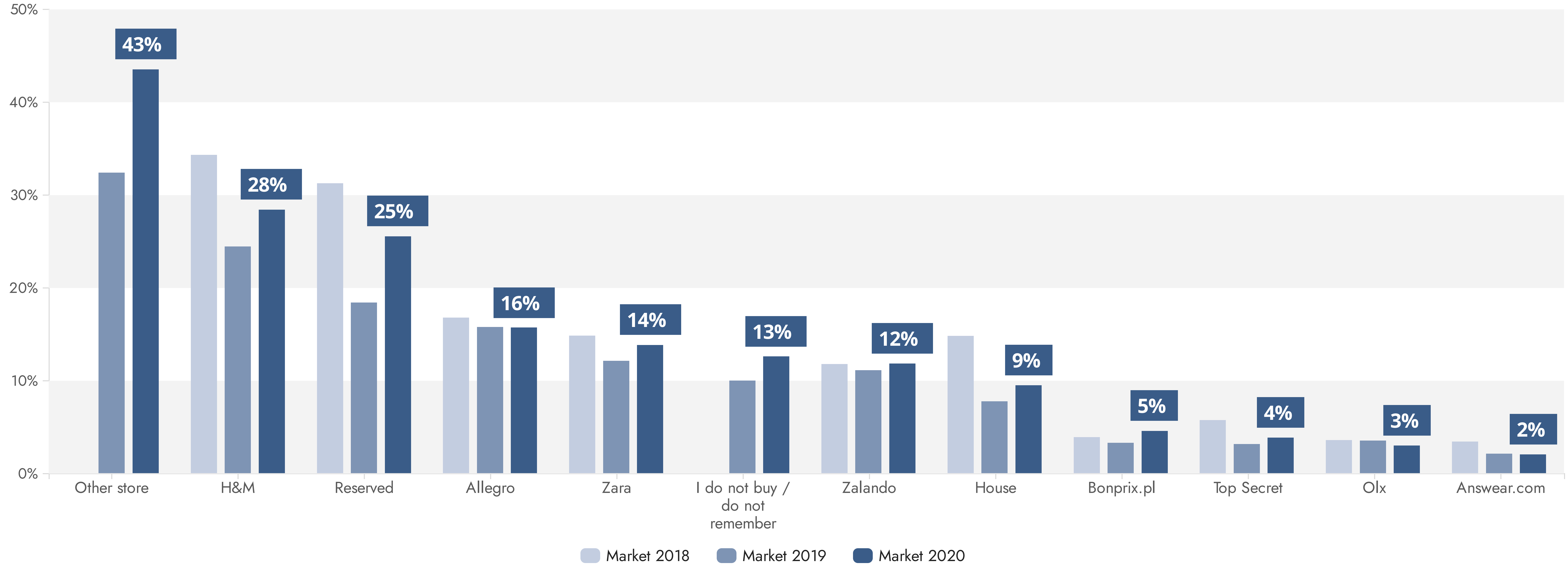


Depending on the shop where the respondents buy clothes, the preferences of the shopping channels vary. In the online channel, Zalando is the leader, while H&M is the leader in traditional sales.

WHERE HAVE YOU RECENTLY BOUGHT CLOTHES?

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

n 2018 = 6481, 2019 = 6789, 2020 = 6656

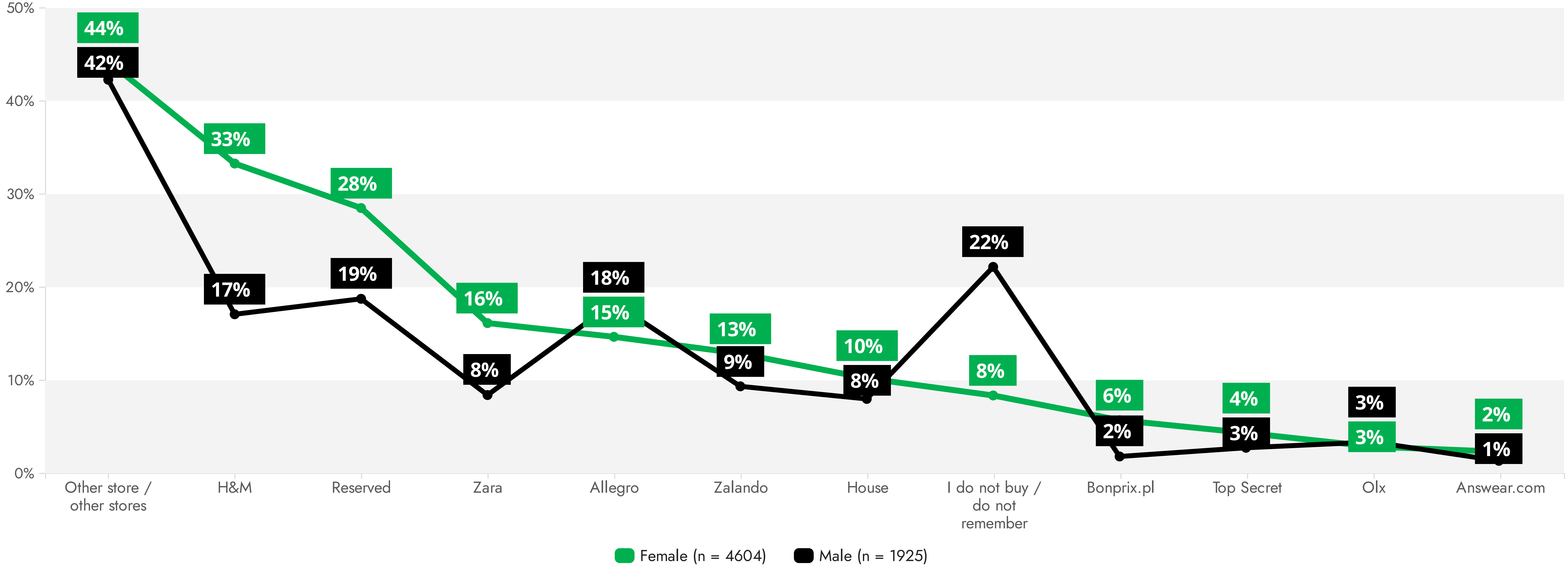


Comparing Omnichannel 2020 results with last year's edition of the survey, we see an increase in the share of purchases in H&M and Reserved chains. The clothing market is becoming more and more scattered every year, which is indicated by a significant increase in the share of "other stores".

WHERE HAVE YOU RECENTLY BOUGHT CLOTHES?

Analysis by gender

n = 6529

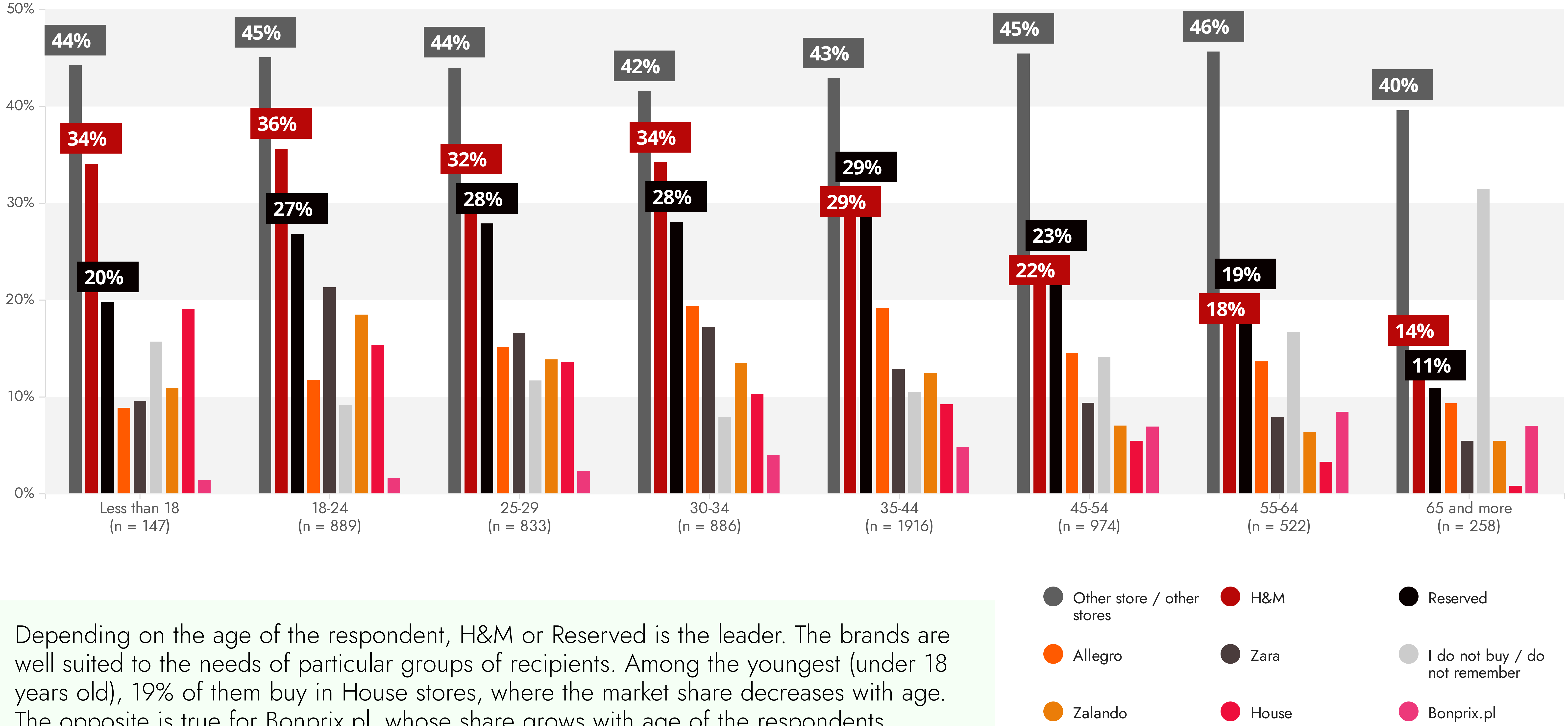


Men buy clothes less often than women. Ladies buy more often in H&M, Reserved and Zara shops than men. For other brands the disproportion is not so big.

WHERE HAVE YOU RECENTLY BOUGHT CLOTHES?

Analysis by age

n = 6425

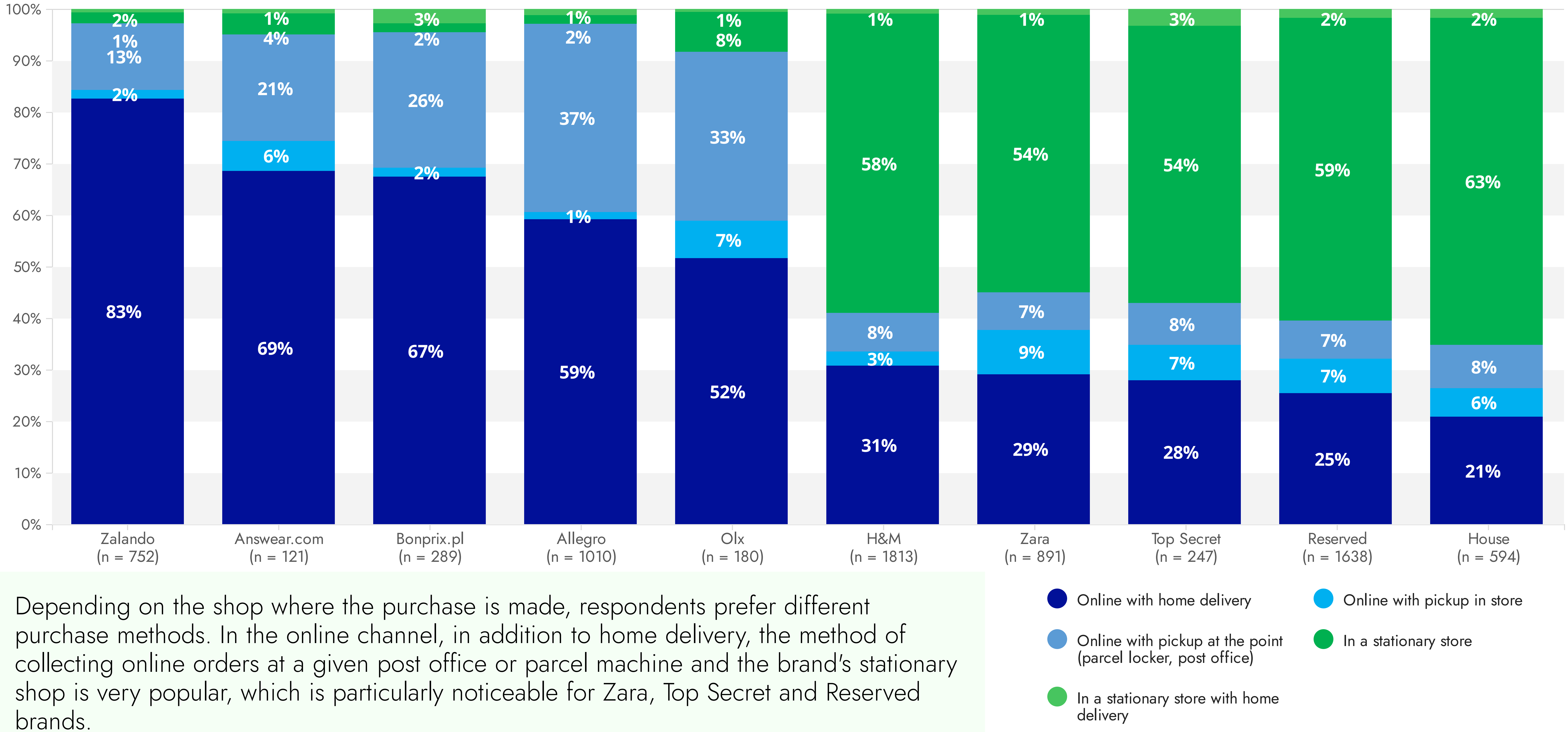


Depending on the age of the respondent, H&M or Reserved is the leader. The brands are well suited to the needs of particular groups of recipients. Among the youngest (under 18 years old), 19% of them buy in House stores, where the market share decreases with age. The opposite is true for Bonprix.pl, whose share grows with age of the respondents.

HOW DID YOU BUY THE PRODUCTS THERE?

Selected purchase channel - single-choice question

n = 4061



Depending on the shop where the purchase is made, respondents prefer different purchase methods. In the online channel, in addition to home delivery, the method of collecting online orders at a given post office or parcel machine and the brand's stationary shop is very popular, which is particularly noticeable for Zara, Top Secret and Reserved brands.

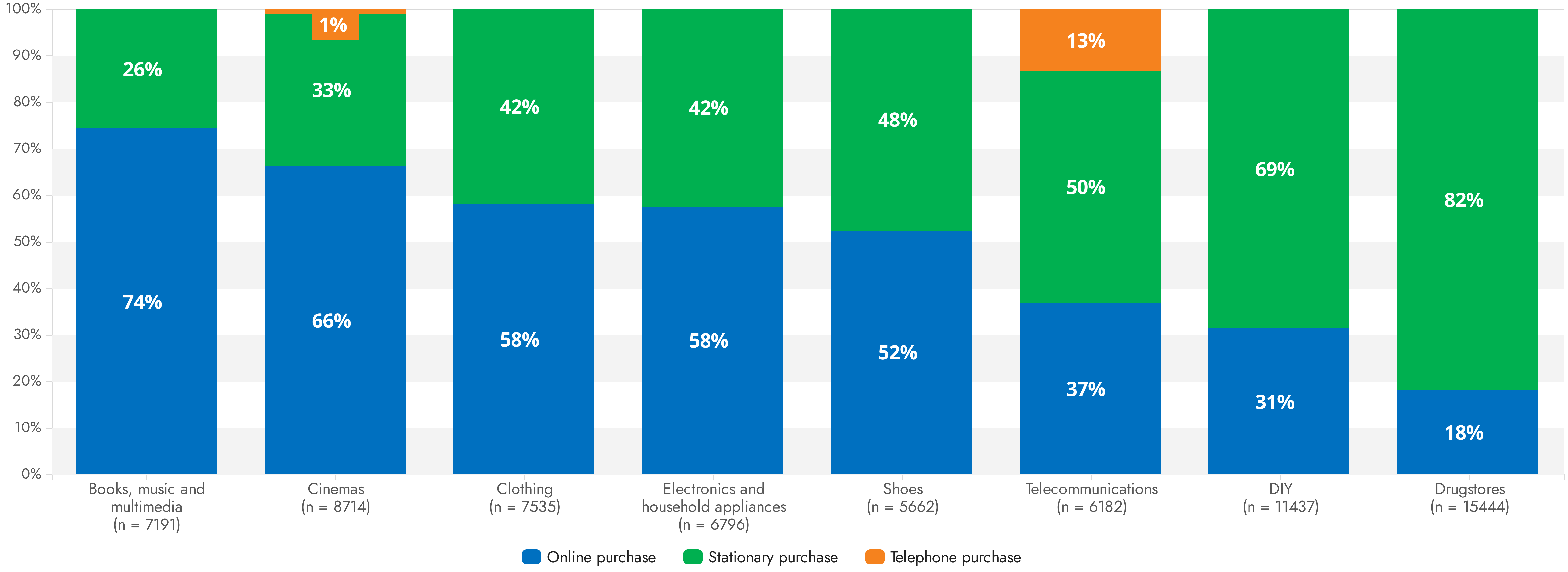
HOW DID YOU BUY THE PRODUCTS THERE?

Selected purchase 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
H&M	30.8% +3.5pp	2.8% +0.2pp	7.5% +4.2pp	58.1% -7.4pp	0.9%	1813
Reserved	25.5% +9.5pp	6.7% -0.5pp	7.4% +6pp	58.8% -15.7pp	1.7%	1638
Zara	29.1% +6.7pp	8.6% +1.9pp	7.3% +5.5pp	53.9% -13.4pp	1.1%	891
Zalando	82.6% -2.4pp	1.7% -0.1pp	12.9% +3pp	2.1% -0.2pp	0.7%	752
House	20.9% +11.1pp	5.6% -1.5pp	8.4% +7.1pp	63.5% -17.2pp	1.7%	594
Bonprix.pl	67.5% -3.1pp	1.7% +1.2pp	26.3% -0.2pp	1.7% -0.8pp	2.8%	289
Top Secret	27.9% +0.5pp	6.9% +0.8pp	8.1% +5.3pp	53.8% -6.5pp	3.2%	247
Answear.com	68.6% -2.4pp	5.8% -0.7pp	20.7% +4.6pp	4.1% -1.5pp	0.8%	121

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

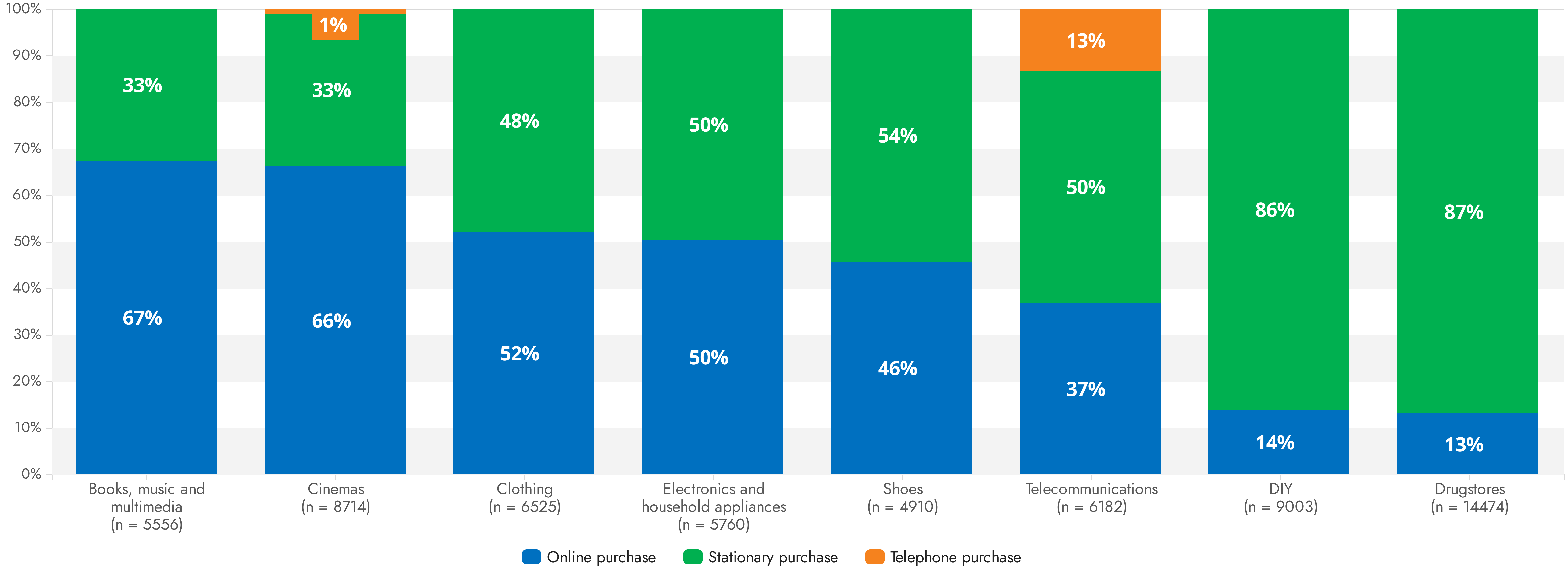
Comparison of selected channels between industries



Comparing the methods of purchasing clothes with the industries surveyed within Omnichannel 2020, it can be seen that both the Internet sales channel and an extensive stationary sales network are important for the respondents, with the first method being indicated.

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 on 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 clothing industry is similar.

EXPERIENCE QUALITY INDICATORS

The research provided by the YourCX team every year is one of the most insightful analyses of the Polish omnichannel by segment. Comparisons of industries and market leaders provide valuable information for making decisions - at every level.

The simplest definition of an omnichannel says that: A customer is a customer of a brand, not a sales channel. In this sense, the user is a participant in a process in which, regardless of the channel, his/her experience is to be consistent and comfortable (seamless user experience). However, the real combination of the online and offline worlds is not that simple. In order to implement a real omnichannel, one that will be appreciated by customers in the first place, full synergy of action at every level of the organization is necessary. And that means eliminating internal antagonisms.

Speaking of the interpenetration of sales channels, it is impossible not to mention something that in the case of the clothing industry is very strongly emphasized by many sellers. Buy a product online and if for some reason it doesn't meet your expectations, return it to one of our traditional salons. On the one hand, this makes it easier for the customer, and on the other hand, thanks to the penetration of channels, it is an attempt to increase potential sales at that particular point of return.

Organisations that have taken the omnichannel direction - looking at the customer's shopping route as a whole. They use the information provided by customers at each customer contact with the brand. Behavioural analyses, sales results and recommendations they receive from surveys of respondents. The beliefs and hypotheses of managers best collide with the data they receive from YourCX analysis. Joining the tracked metrics of Your Customer Experience Index and NPS is a sine qua non for running a responsible customer-oriented business.

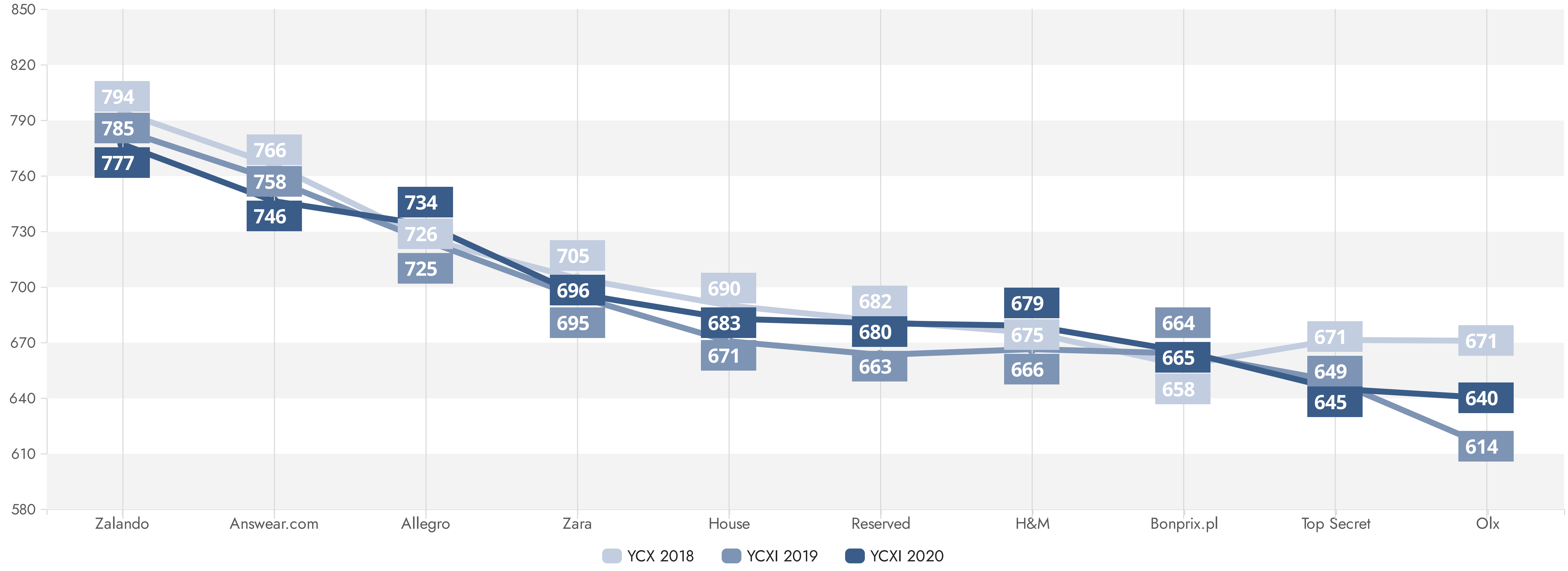
The YourCX study analysing market leaders is the best confirmation of this.

Listen to your customers. Test your beliefs. Analyse data. Follow the omnichannel.

Jakub Gierszyński
E-Commerce and Marketing Director
Inter Cars S.A.

YOUR CUSTOMER EXPERIENCE INDEX

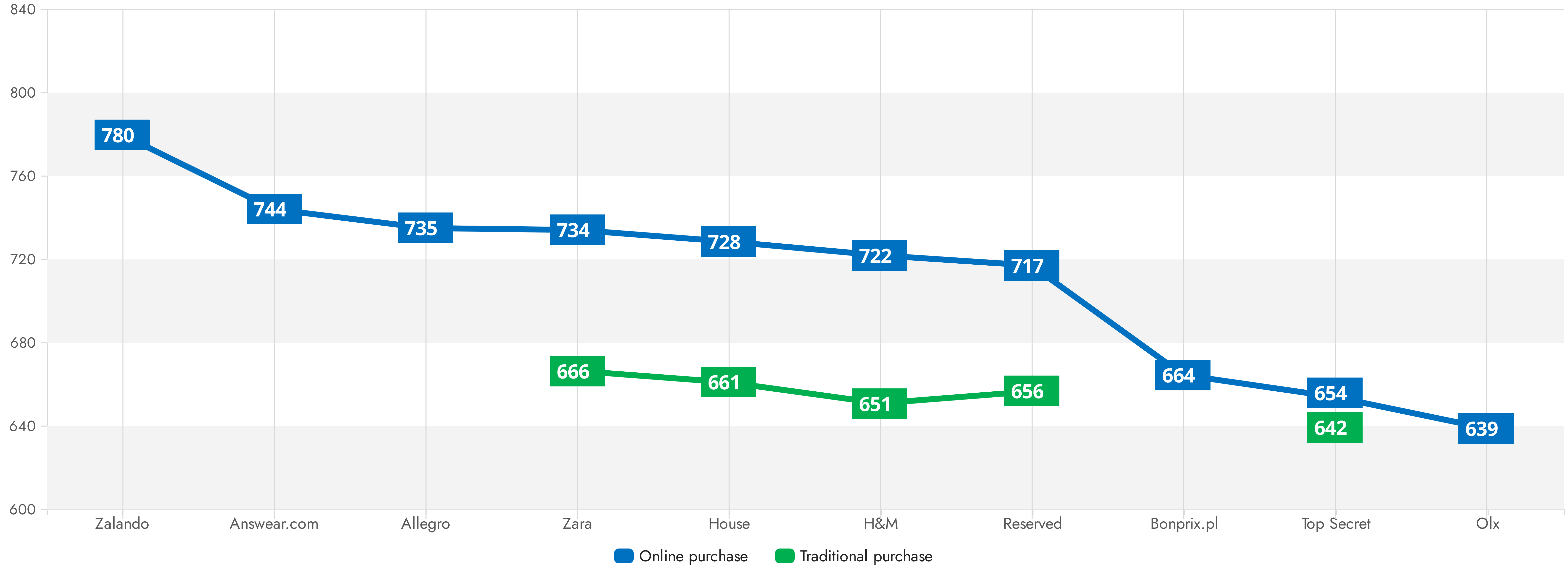
Quality indicator on a scale from 0 to 1000 taking into account four satisfaction factors:
availability and choice of products, ease of order placement, satisfaction with the purchase, willingness to recommend the store to friends



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 companies have scored around two thirds of the possible points. The industry leaders are Zalando, Answear.com and Allegro. Most of the companies surveyed oscillate in a similar range of points compared to previous editions of the survey, i.e. the baseline assessments have not changed much.

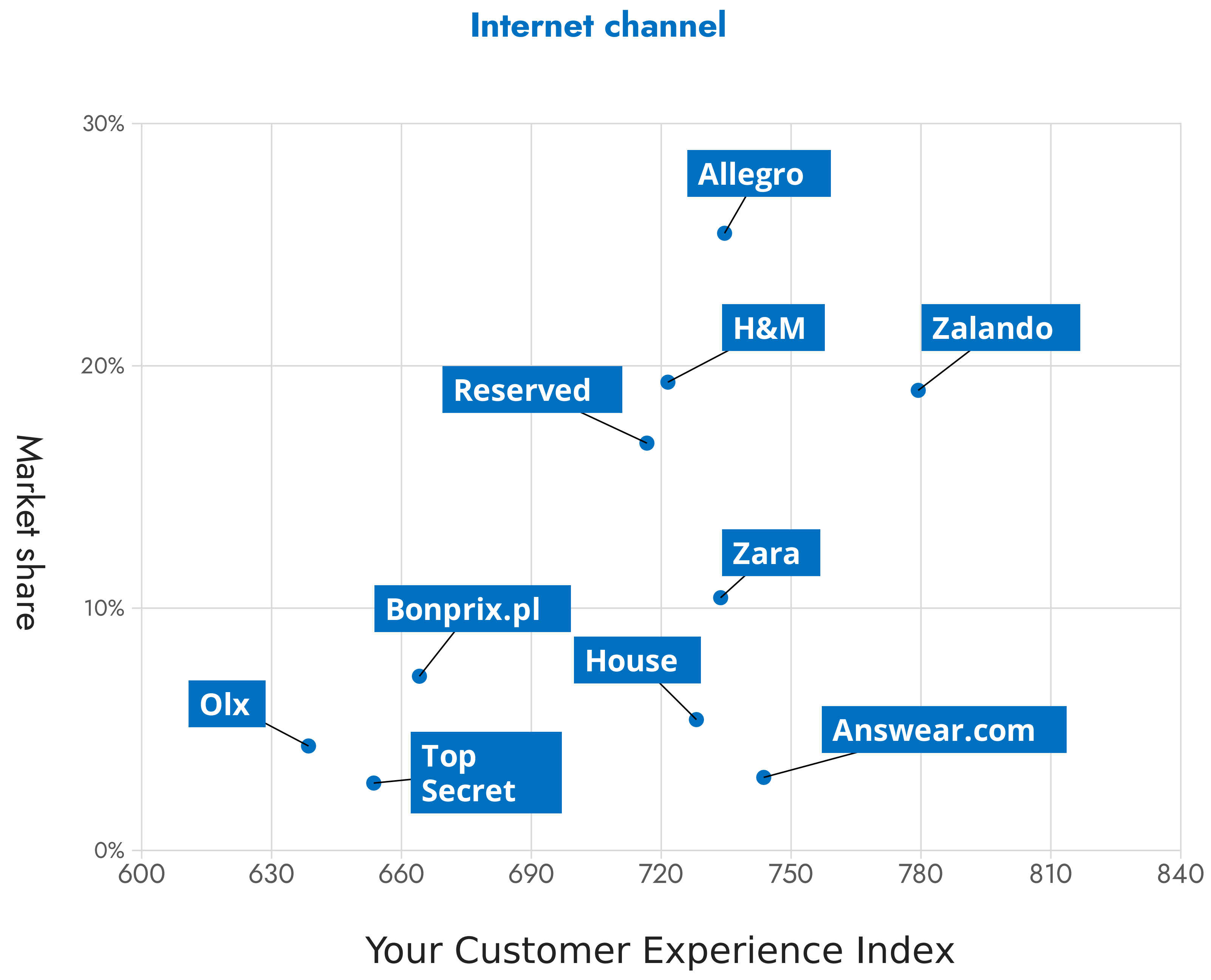
YOUR CUSTOMER EXPERIENCE INDEX

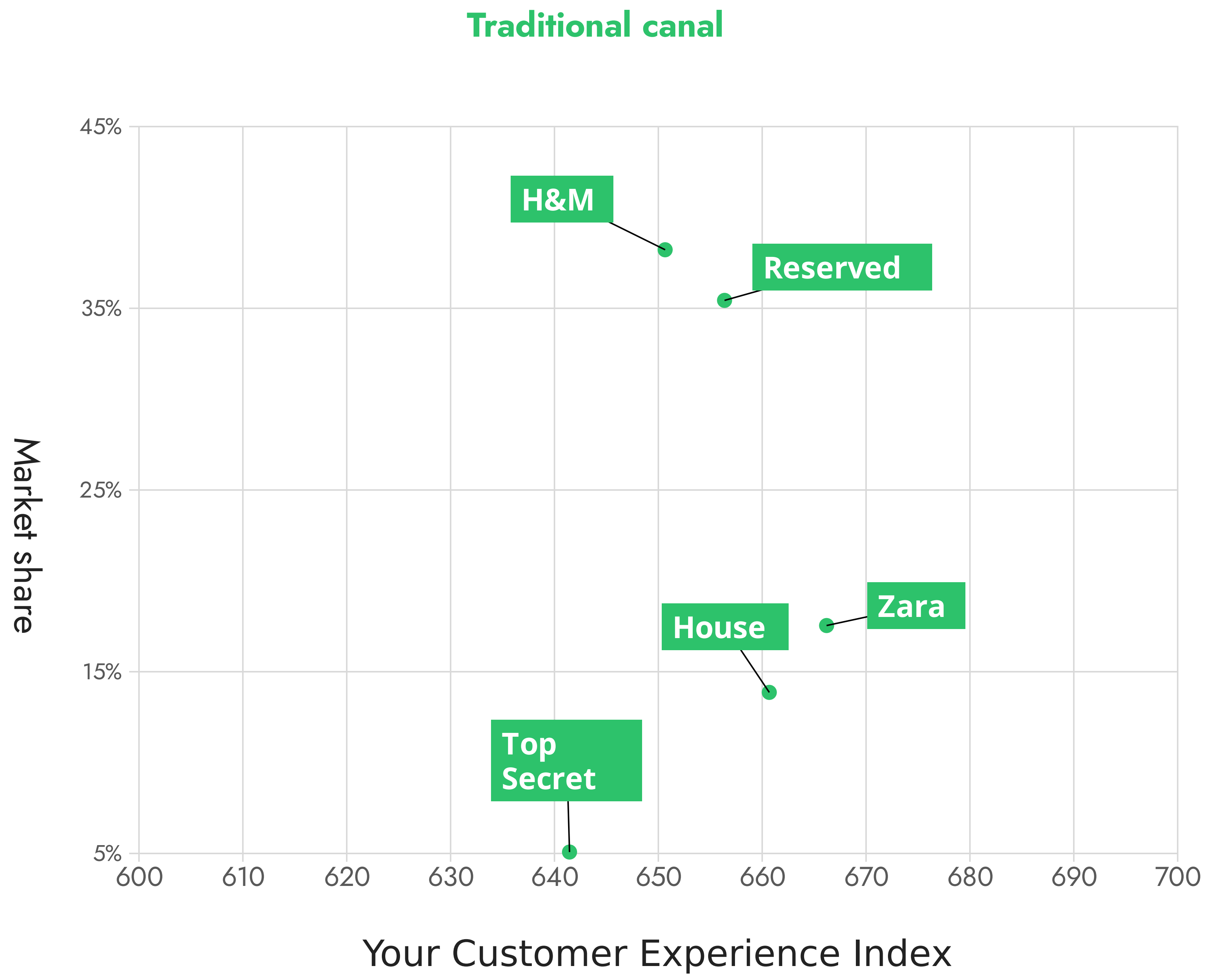
Quality indicator on a scale from 0 to 1000 with a breakdown by purchasing channel



It is noteworthy that the respondents more positively assess the experience of online shopping than that of traditional sales. Zalando boasts the highest quality indicator in the online channel and Zara the highest quality indicator in the traditional sales channel.

YOUR CUSTOMER EXPERIENCE INDEX

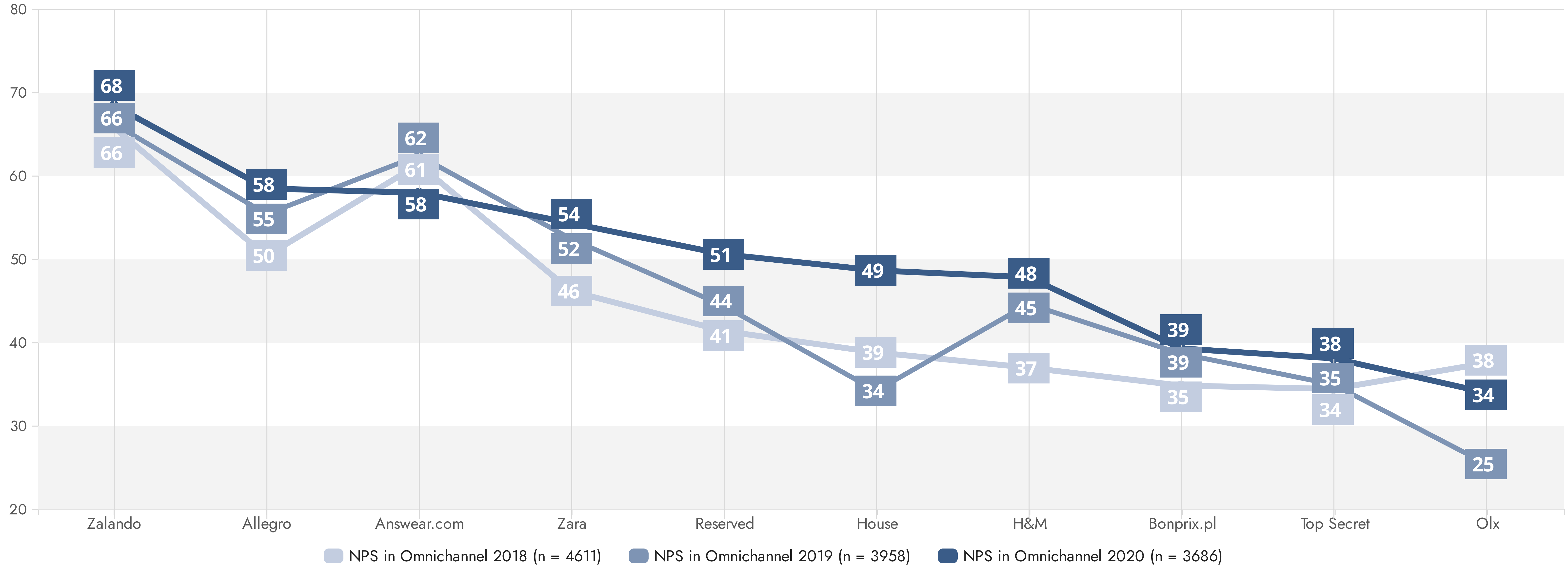




The charts show market shares depending on the sales channel and the value of Your Customer Experience Index. The Internet channel is dominated by Allegro with the largest market share and Zalando with the highest value of the index. In the fixed channel, H&M has the largest share and Zara is the leader of experience in this area.

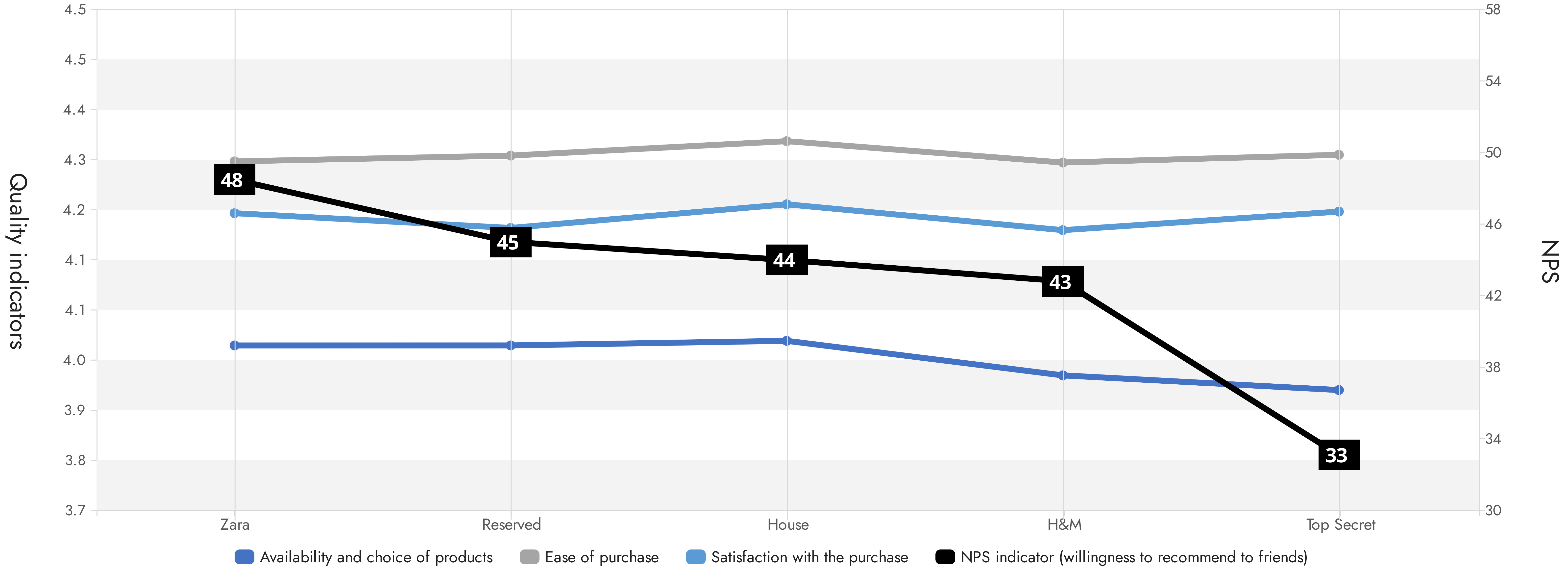
HOW LIKELY ARE YOU TO RECOMMEND THESE SHOPS TO YOUR FRIENDS?

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



TRADITIONAL CHANNEL - QUALITY ASSESSMENT OF EXPERIENCES

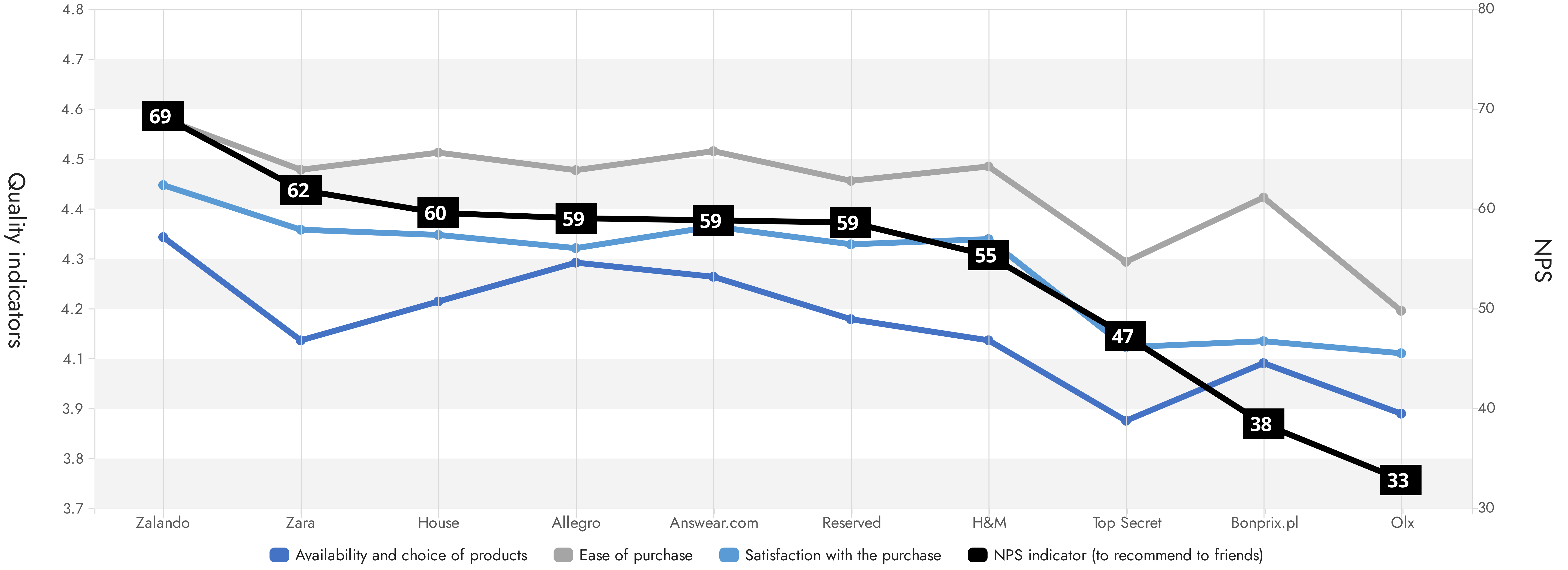
Quality ratings on a scale from 1 to 5 and NPS on a scale from -100 to 100



The highest NPS index in the traditional channel is recorded for Zara, while the respondents rated Reserved, House and H&M similarly. The smallest selection is in Top Secret, which is also the least popular among the surveyed brands.

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 particular aspects of the experience in comparison with the NPS indicator we observe the strength of the Zalando 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.

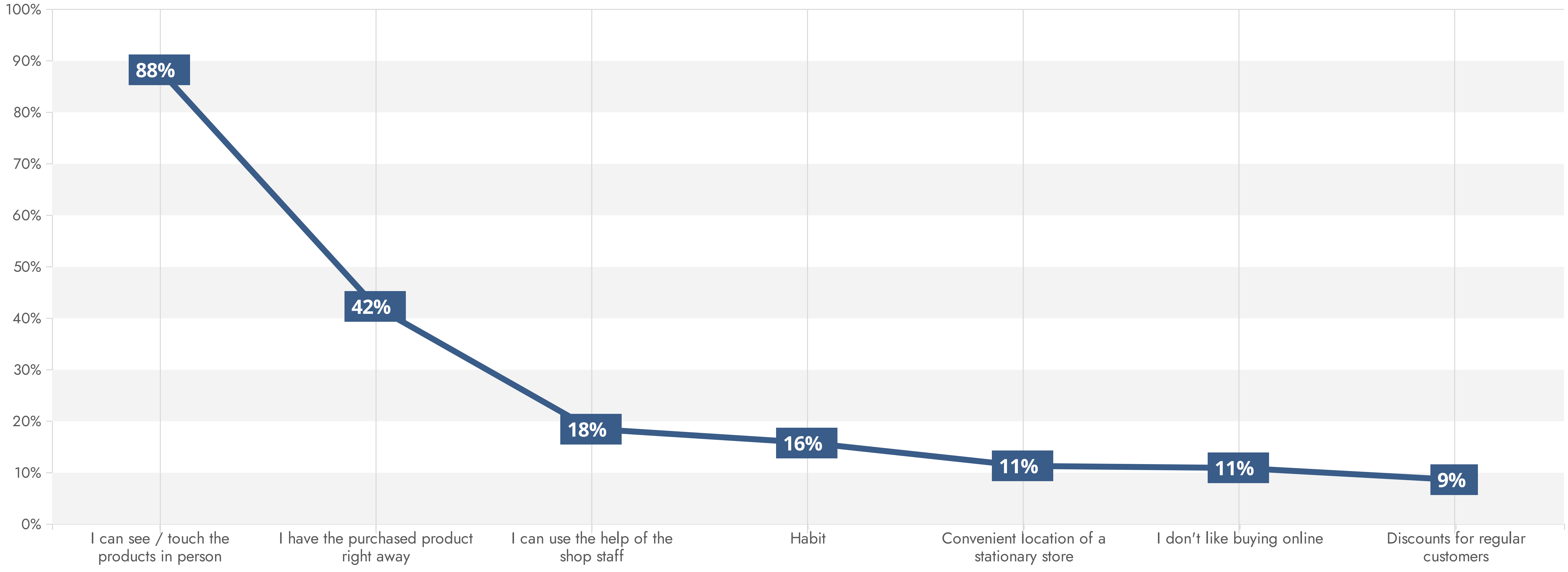
Nikodem Krajewski
IDEACTO CEO

SHOPPING PREFERENCES IN THE STATIONARY CHANNEL

WHY DO YOU PREFER TO BUY CLOTHES IN A STATIONARY STORE?

Traditional channel - Multiple choice question

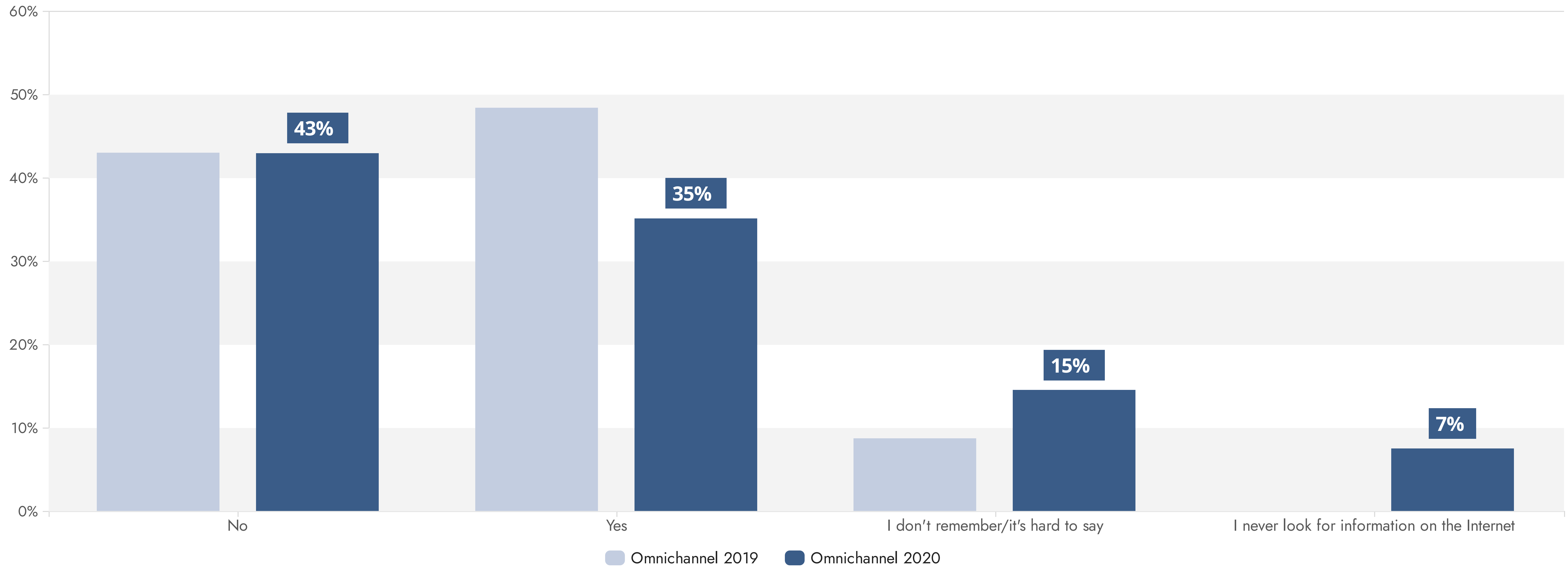
n = 2583



BEFORE THE LAST PURCHASE OF CLOTHES IN A STATIONARY SHOP, DID YOU LOOK FOR INFORMATION ON THE INTERNET?

Traditional channel - Multiple choice question

n = 1254

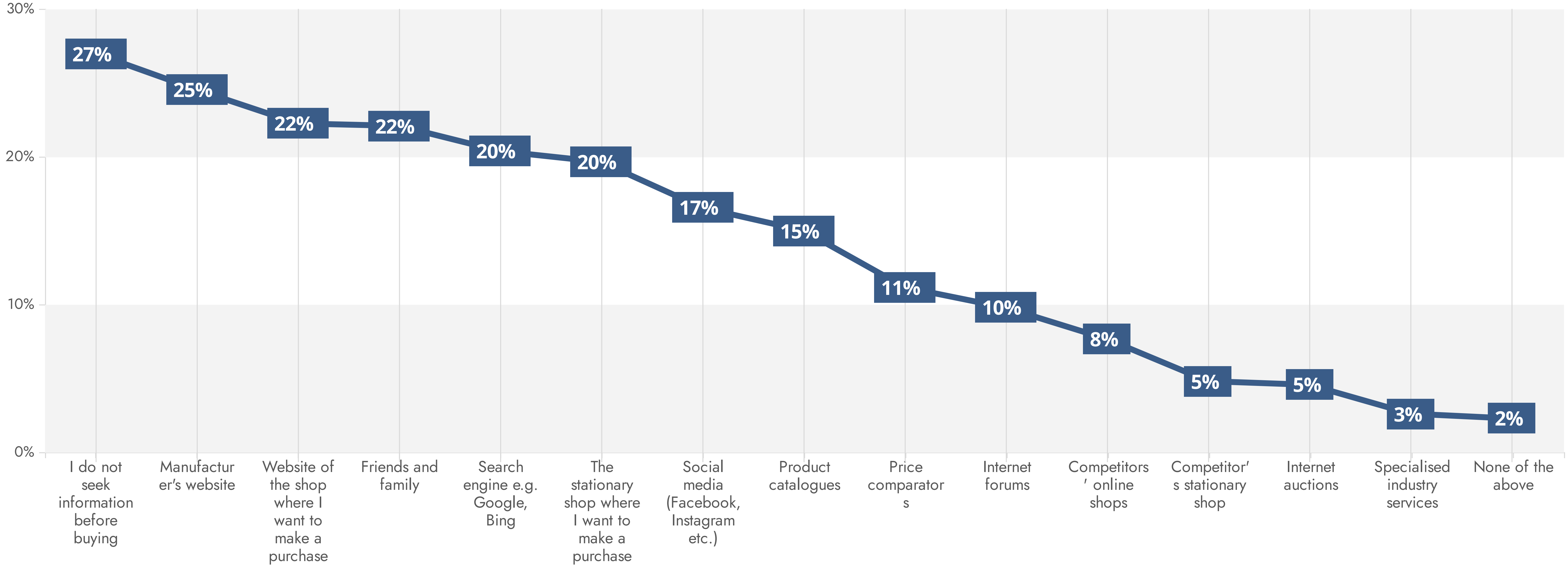


We can clearly see a decrease in the proportion of people who, before making a purchase, look on the Internet to obtain product information, opinions or comparisons with others.

WHERE DO YOU OBTAIN PRODUCT INFORMATION BEFORE PURCHASE?

Traditional channel - Multiple choice question

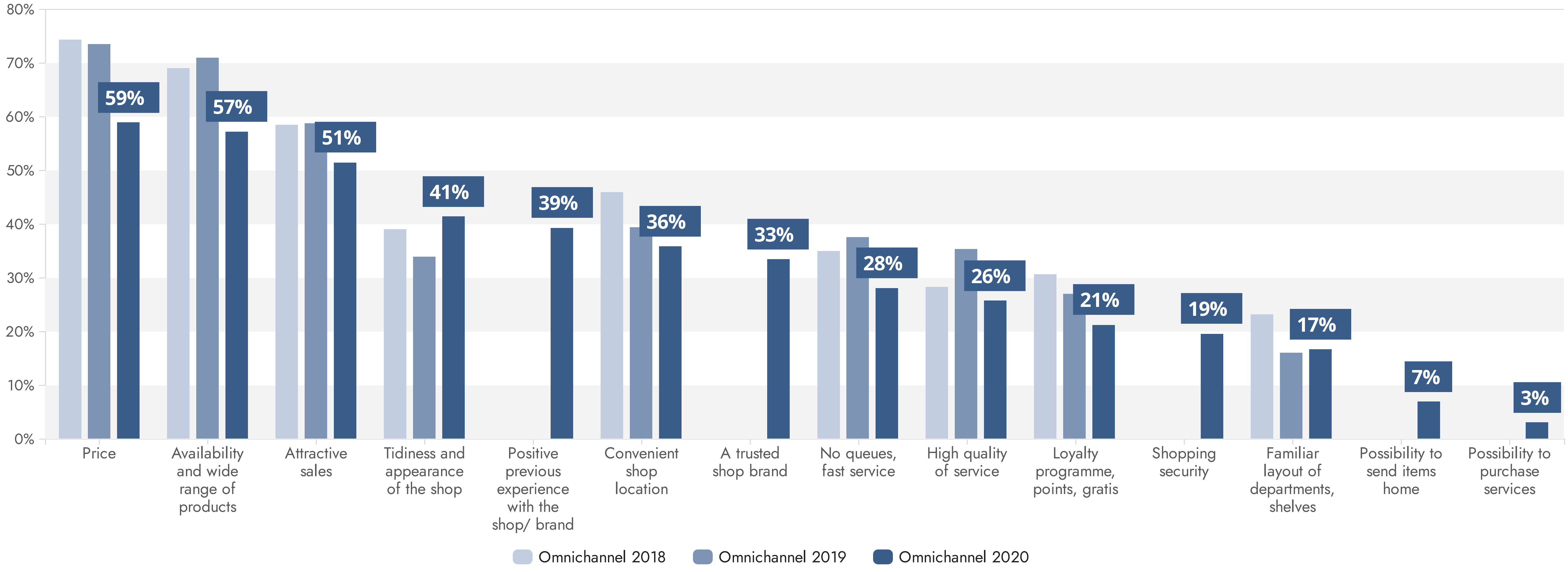
n = 1227



WHAT IS MOST IMPORTANT TO YOU WHEN SHOPPING FOR CLOTHES IN A STATIONARY SHOP?

Traditional channel - Multiple choice question

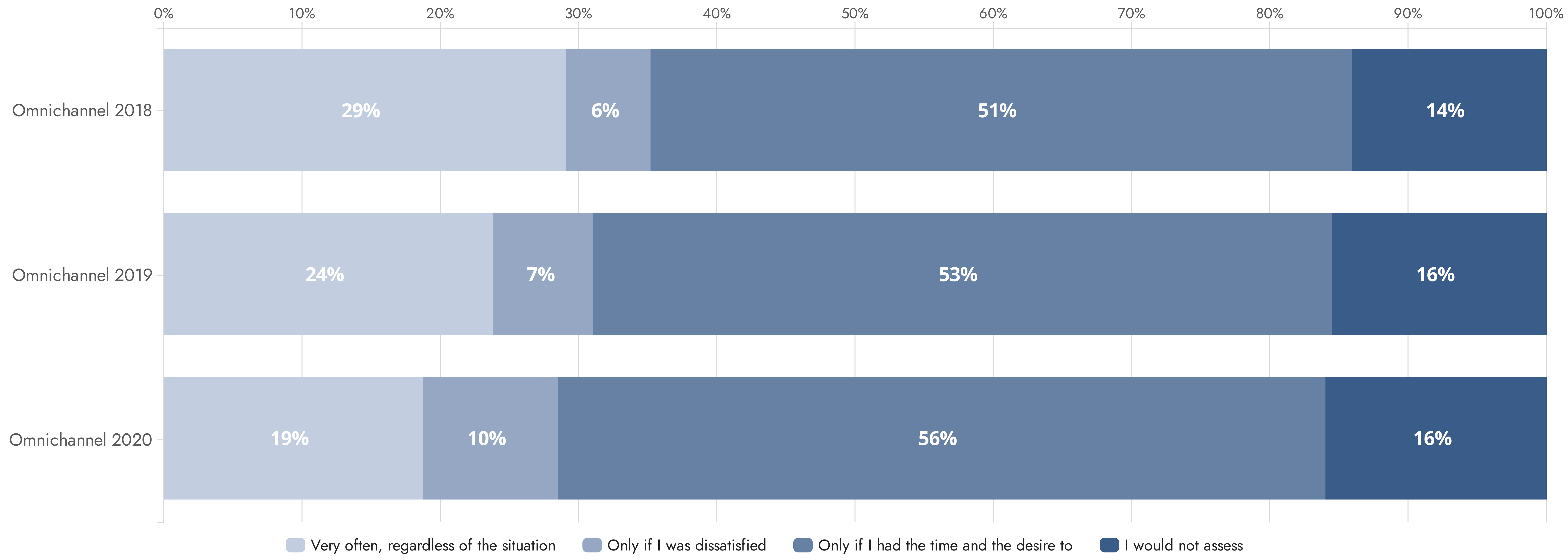
n = 1028



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

Traditional channel - Single choice question

n = 1106

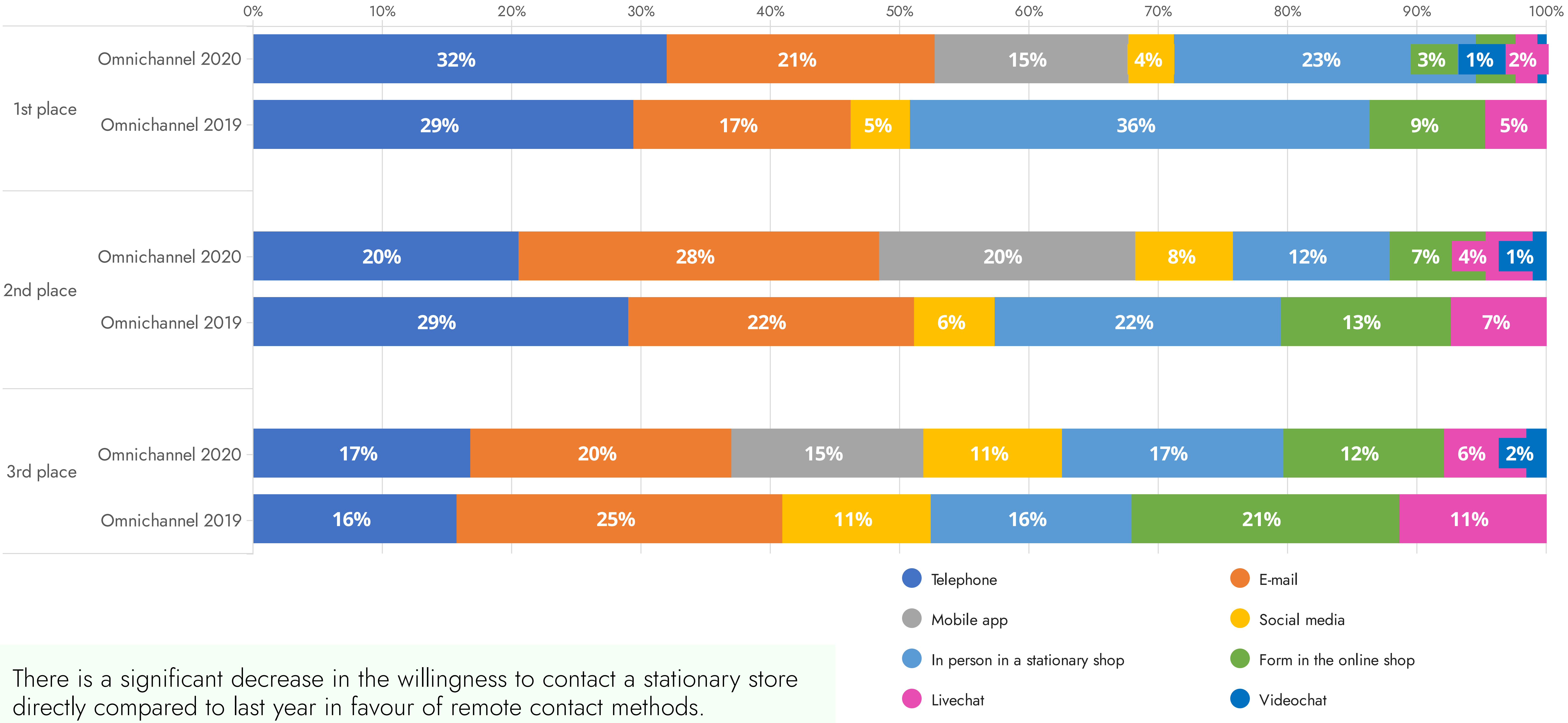


Only 16% of respondents say a strong 'No' to sharing their opinions and shopping experiences, which means that many people want to pass on their insights to others, but do not always have the opportunity to do so.

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 = 989



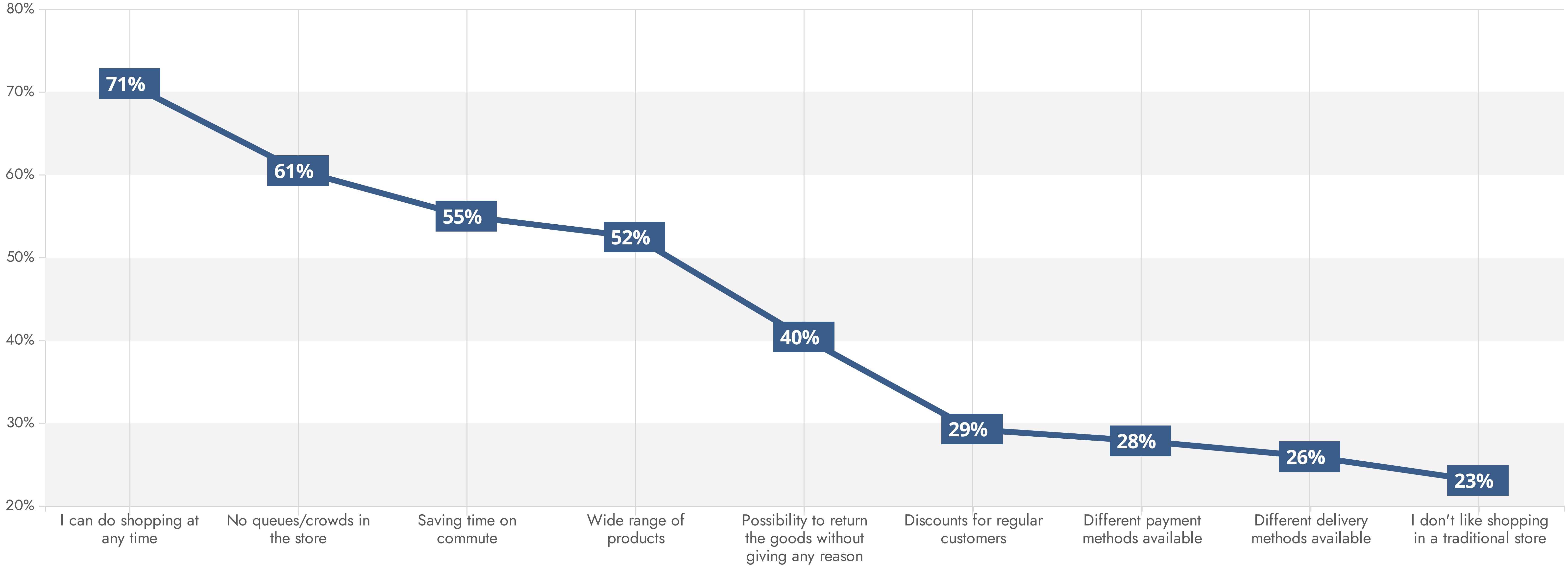
There is a significant decrease in the willingness to contact a stationary store directly compared to last year in favour of remote contact methods.

SHOPPING PREFERENCES ON THE INTERNET CHANNEL

WHY DO YOU PREFER TO BUY CLOTHES IN AN ONLINE SHOP?

Internet channel - Multiple choice question

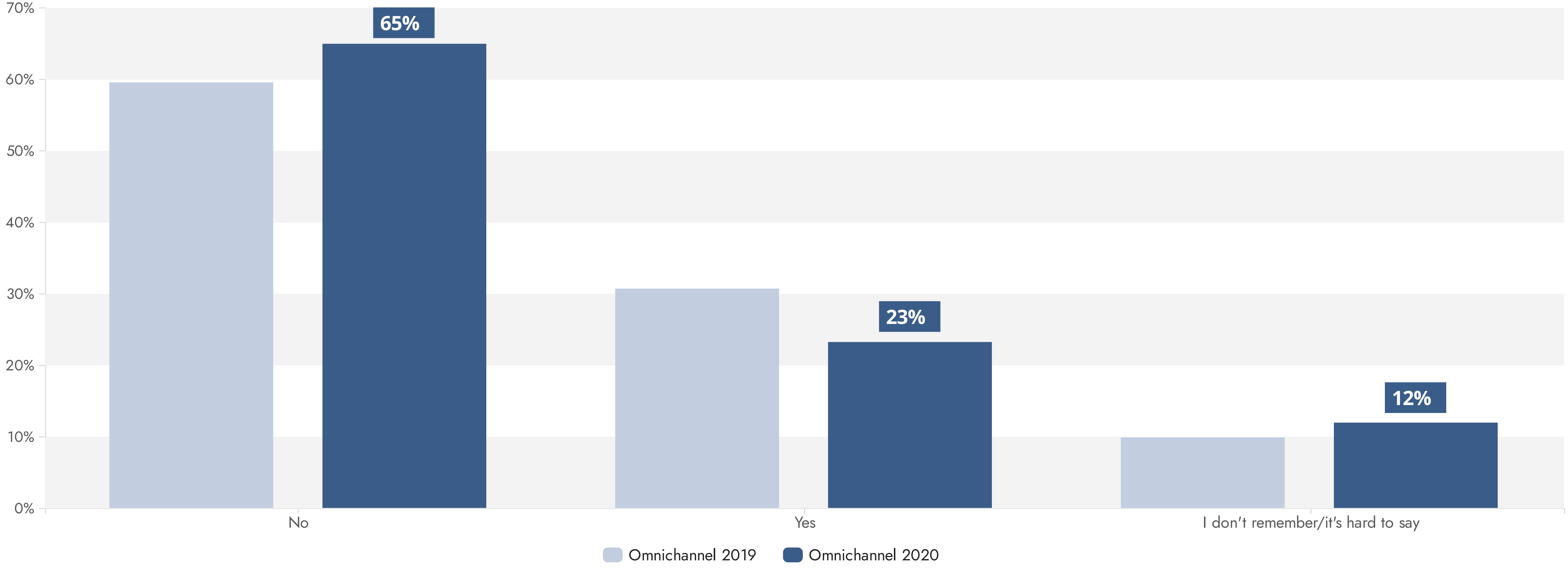
n = 1294



BEFORE THE LAST PURCHASE OF CLOTHES IN AN ONLINE SHOP, DID YOU VISIT THE STATIONARY SHOPS TO GET ACQUAINTED WITH THE PRODUCT?

Internet channel - Multiple choice question

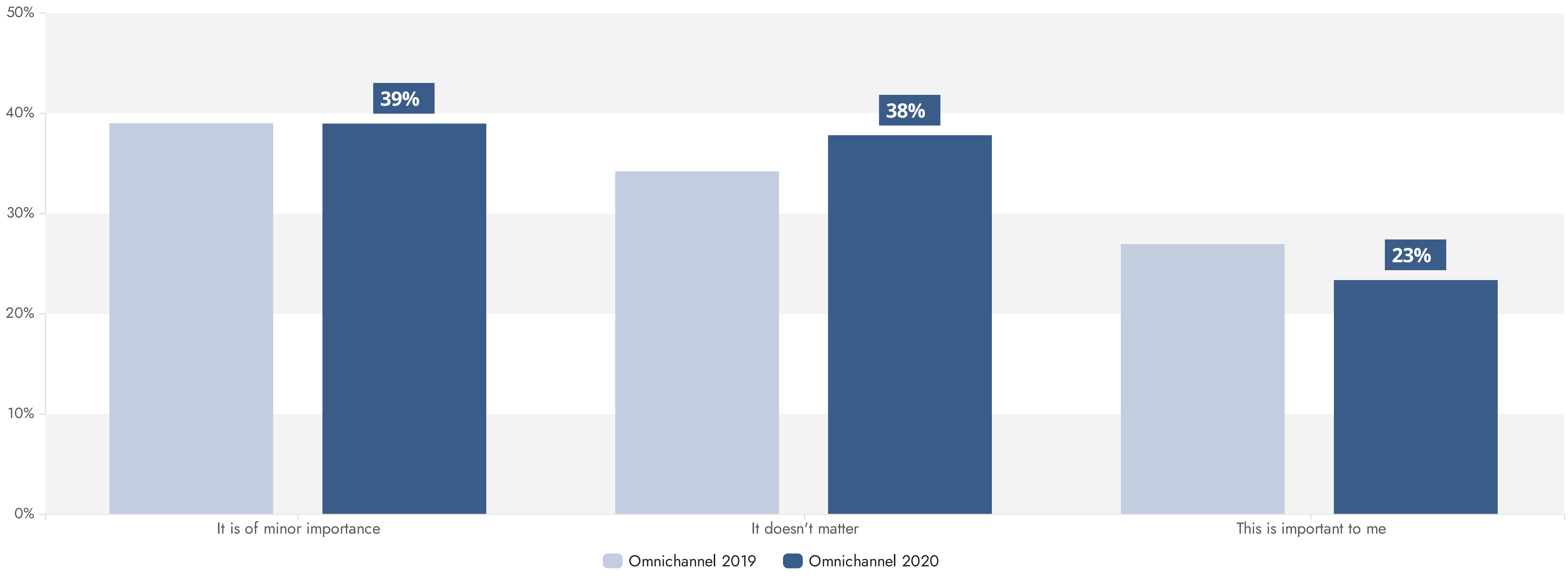
n = 1812



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

Internet channel - Multiple choice question

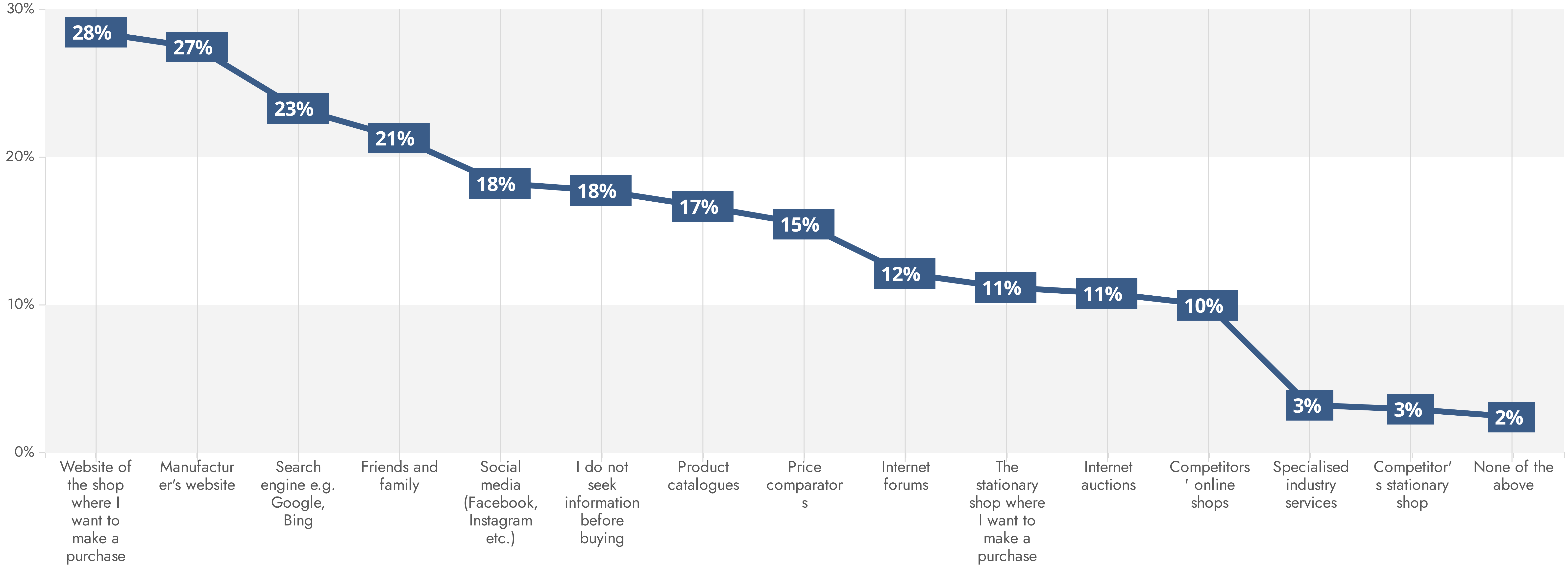
n = 1750



WHERE DO YOU OBTAIN PRODUCT INFORMATION BEFORE PURCHASE?

Internet channel - Multiple choice question

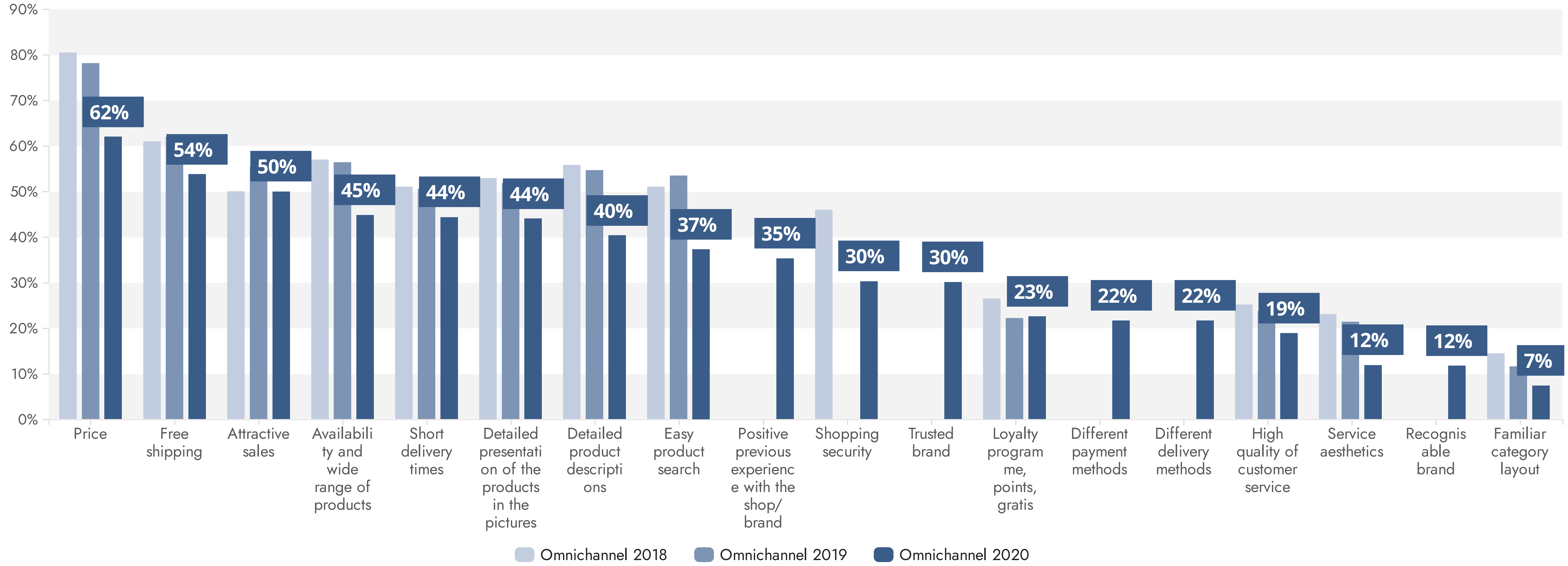
n = 1785



WHAT IS THE MOST IMPORTANT THING FOR YOU WHEN SHOPPING FOR CLOTHES ONLINE?

Internet channel - Multiple choice question

n = 1441

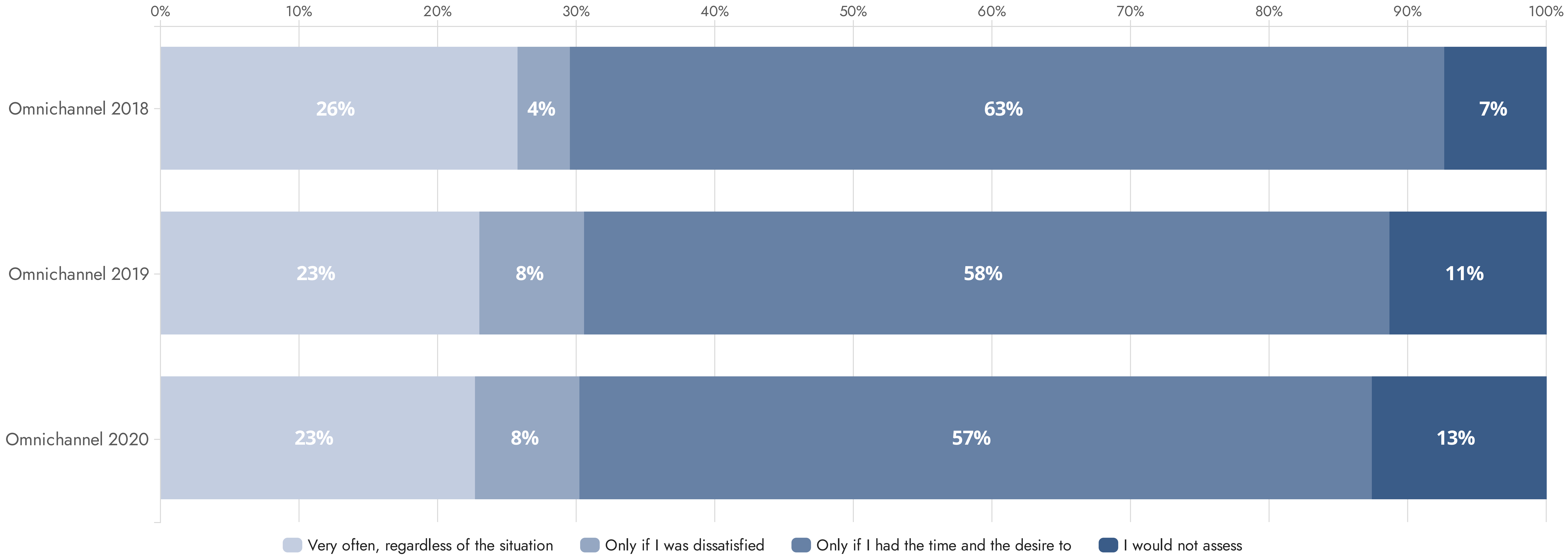


The price of the product is no longer so important to the customer from year to year, and all the circumstances such as free shipping or a wide range of products are becoming more and more important.

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

Internet channel - Single-choice question

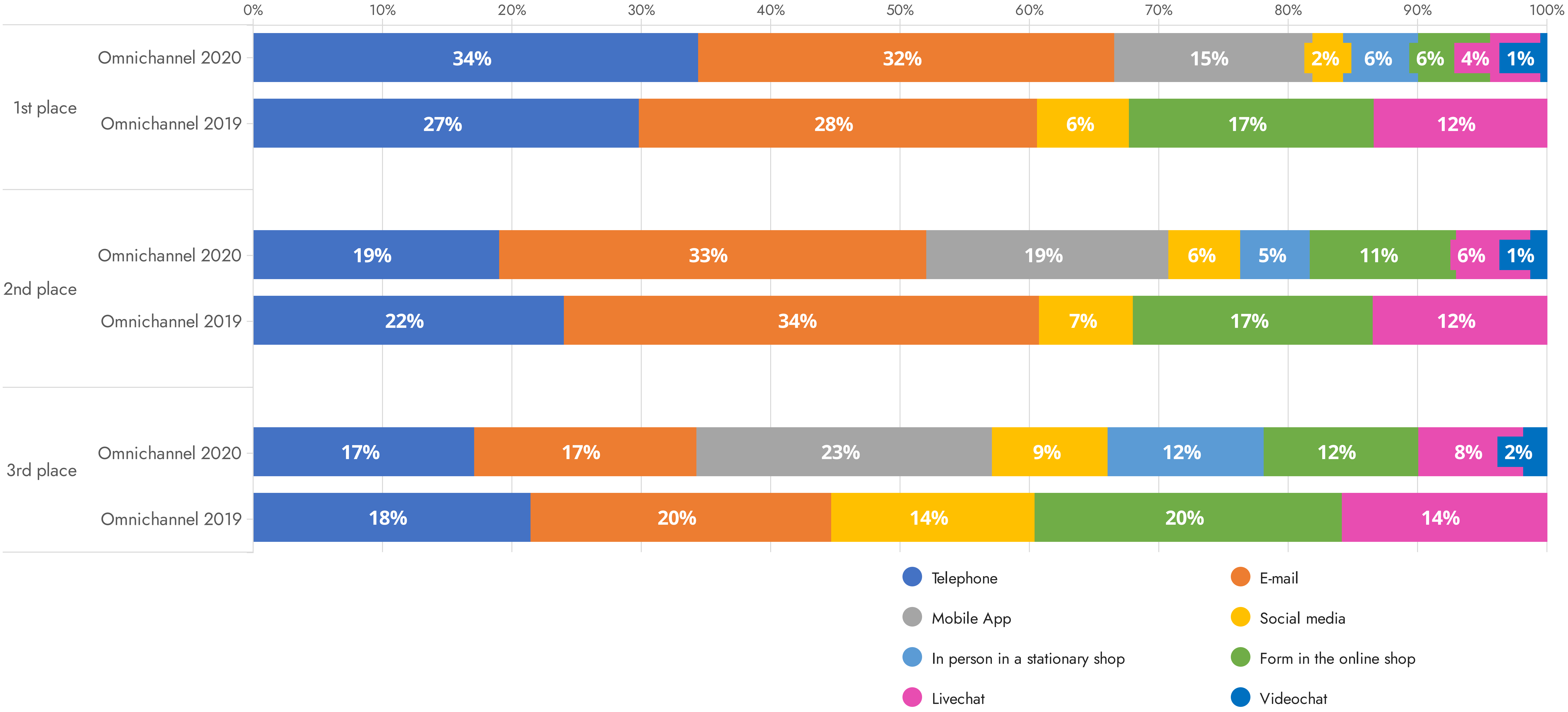
n = 3840



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 = 1470



POST-PURCHASE EXPERIENCE

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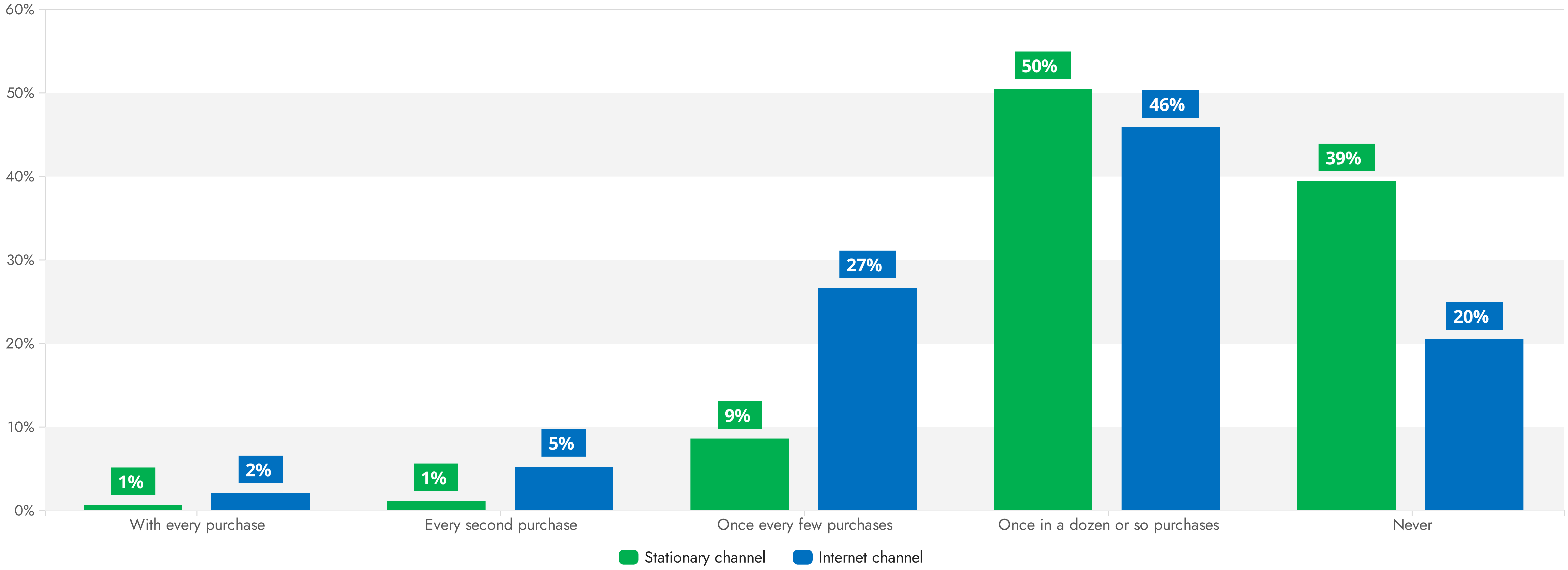
HOW OFTEN DO YOU RETURN YOUR CLOTHES (COMPLAINT / RETURN / EXCHANGE)?

Single-choice question

n = 2493

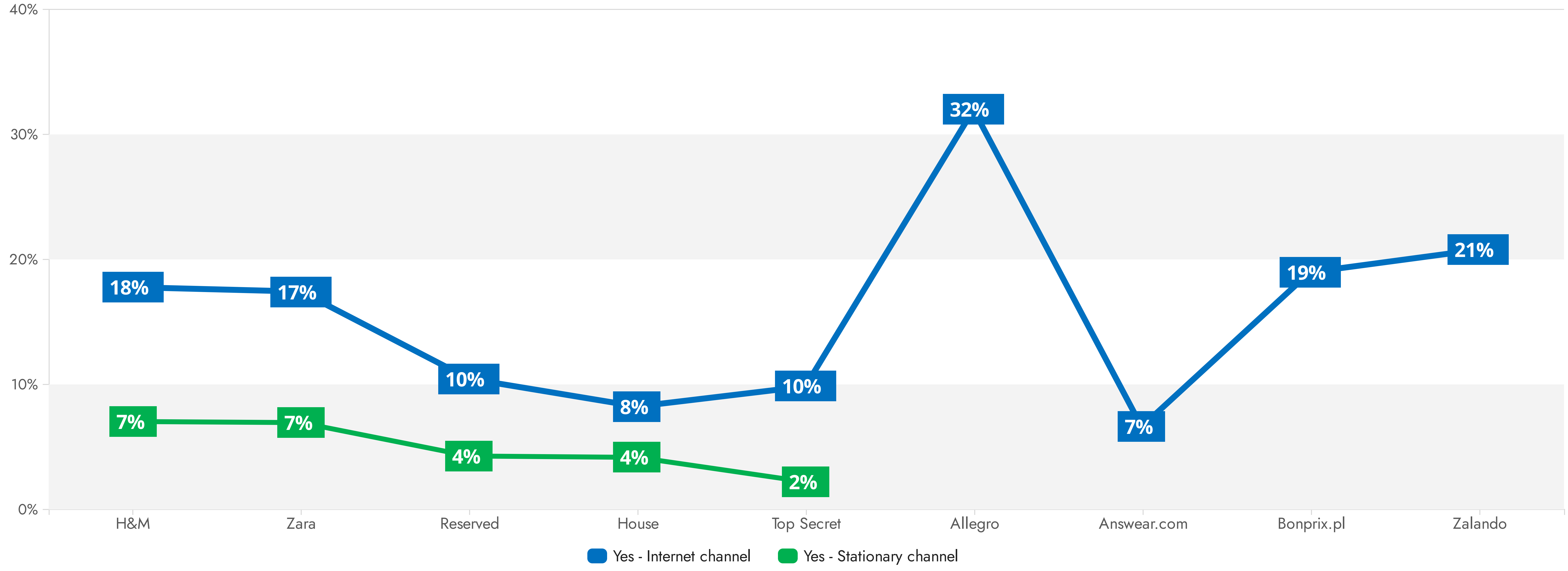


We already know that the e-commerce segment is growing in strength, but it should be noted that the share of returns of purchased products in this channel is much higher than in the case of traditional sales, which in turn is associated with the increased work of after-sales service.

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

Analysis of customers having contact with Customer Service Offices

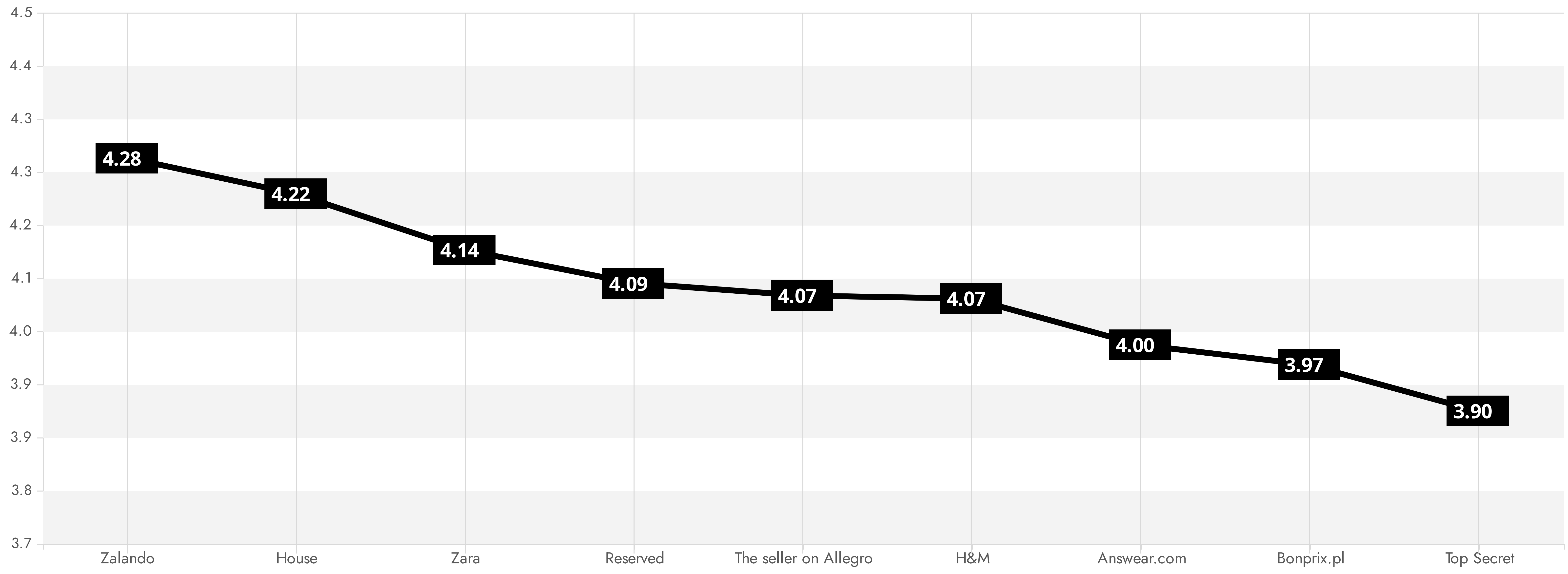
n online shop = 1632, n traditional shop = 1181



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

Evaluation on a scale of 1 to 5

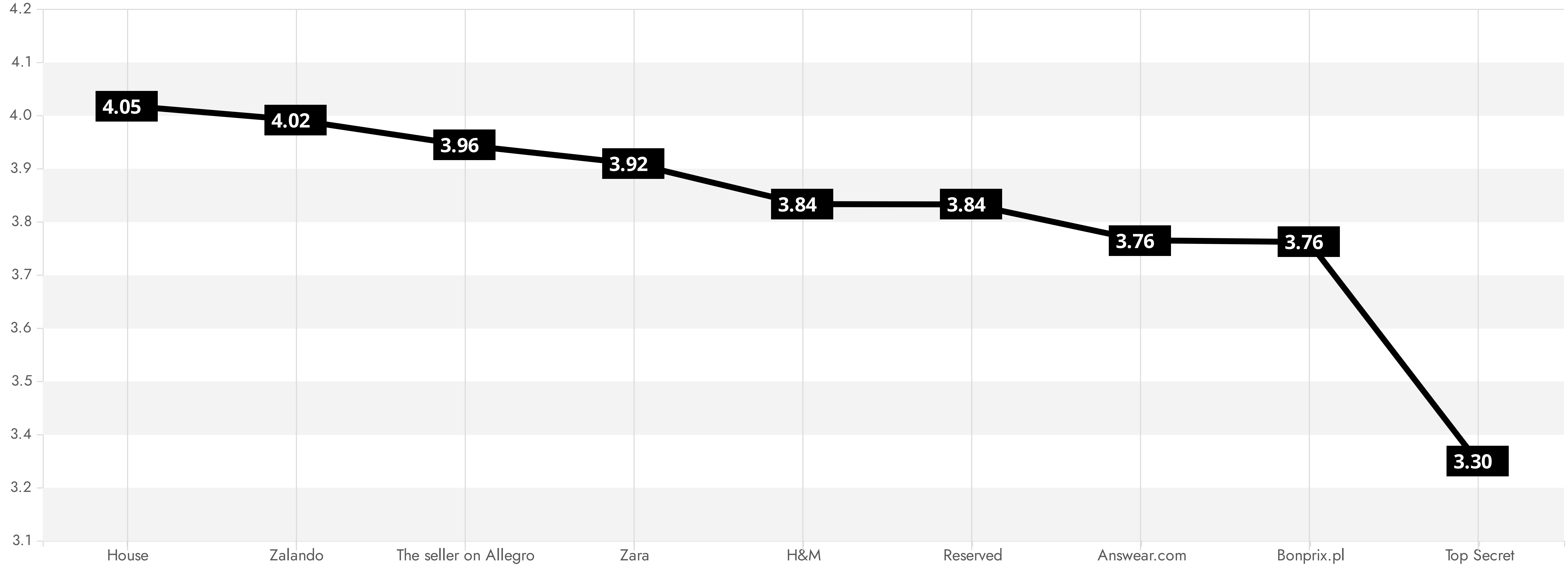
n = 1363



CONTACT ASSESSMENT WITH THE CUSTOMER SERVICE DEPARTMENT - CALL WAITING TIME

Evaluation on a scale of 1 to 5

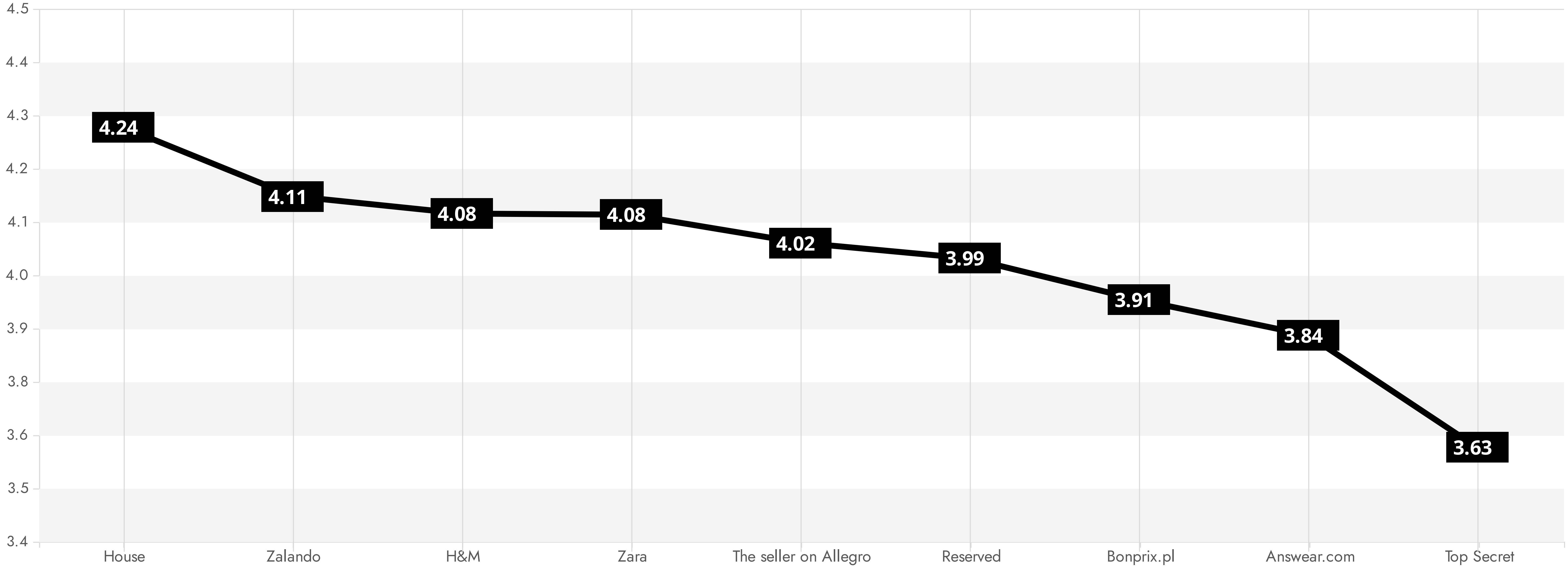
n = 1294



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

Evaluation on a scale of 1 to 5

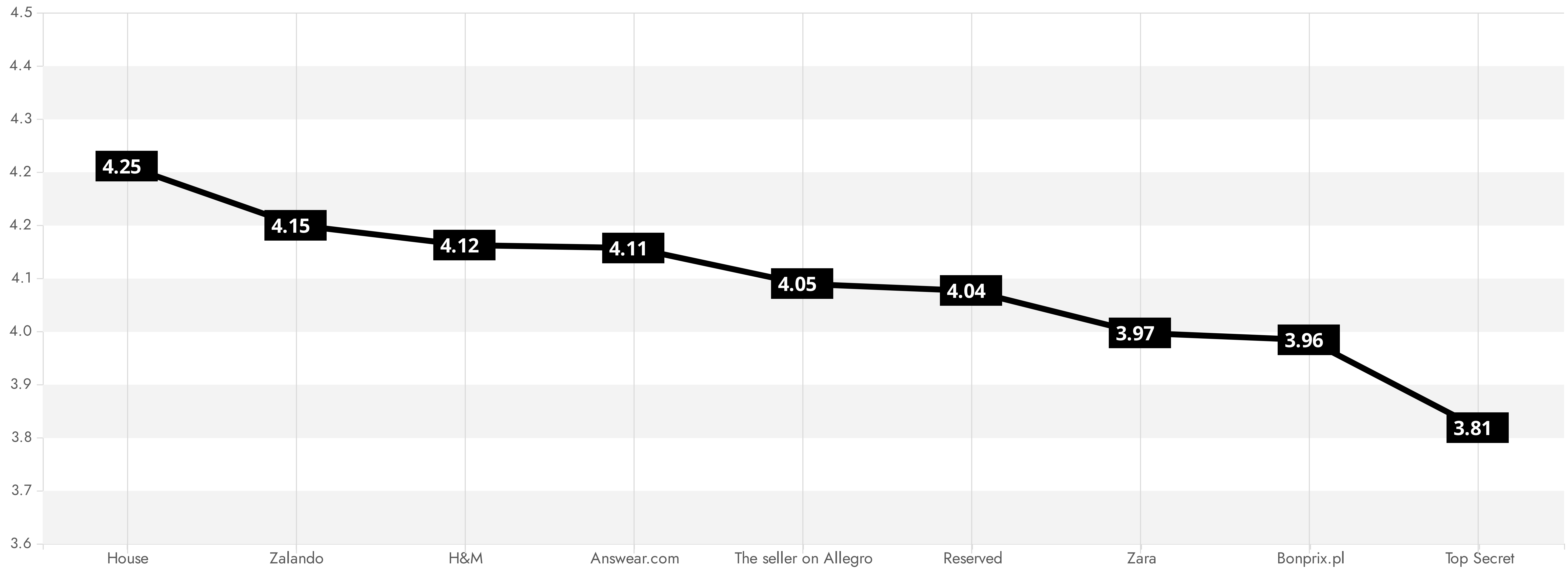
n = 1297



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

Evaluation on a scale of 1 to 5

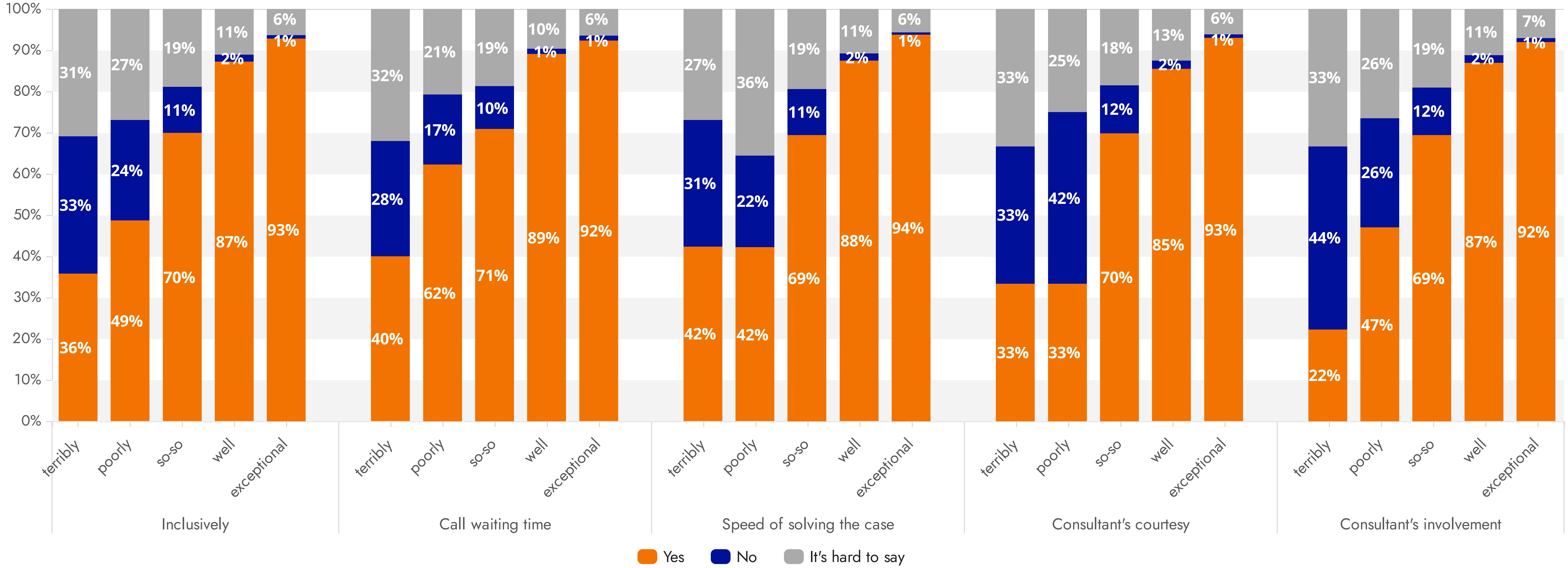
n = 1281



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

Single-choice matrix question

n = 1336



Negative assessment of a consultant's involvement has the greatest impact (terribly and poorly assessments) on the unwillingness to reuse the offer of a given brand. The strongest influence in the case of a fatal assessment is, in turn, the consultant's courtesy and the consultant's involvement, then 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 committed consultant first, who is polite and will solve 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

8

We have studied eight product segments


Cinemas

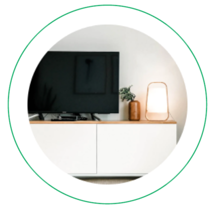

Clothing


Drugstores


Shoes


Telecommunications


Home and garden


Electronics and household appliances


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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