YourCX

REPORT

OMNI CHA NNEL 2023

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Observing the strengthening trend of online shopping, we also see the intensification of competition in this field. We are wondering how to convince the customer to choose just our store? Maintaining the growth of market share is becoming more and more challenging, as not only the product itself and its price influence the purchase decision, but also all the accompanying circumstances. The entire customer experience along the purchase path, i.e. the presentation, convenience and security of the transaction, the return/exchange option, as well as the quality of post-sale support, affect the customer's perception and inclination to use or recommend a particular retailer again in their neighborhood.

Analysis of the omnichannel customer experience reveals a comprehensive picture of the challenges facing store owners in today's highly customer-centric environment. One of the key elements of such experiences is the need to ensure consistency and seamlessness between the various channels of customer interaction - both online and offline. Looking at the growing competition, everyone is wondering how to deliver the best possible shopping experience to their customers to build a lasting relationship with them and ensure their loyalty.

Because the OMNICHANNEL survey is produced periodically, we can compare results up to five years back and draw conclusions based on long-term trends. In addition, the survey is conducted on a large percentage of Polish Internet users, which allows for detailed in-depth analysis while maintaining the relevance of the results and large samples.

I would like to say a big thank you to our Partners and everyone who participated in the implementation of OMNICHANNEL2023. I hope that the collected results will help to better understand shoppers as well as encourage everyone to further develop Customer Experience programs that ultimately serve us all.

Piotr Wojnarowicz
YourCX CEO

METHODOLOGY RESEARCH

- Quantitative qualitative data collected **anonymously and voluntarily**, without gratification to respondents;
- Survey possible to participate and complete **online** only **once**;
- Survey target group corresponding to a cross-sectional profile of Internet users in Poland;
- Reach of over **2,600,000 consumers** obtained through survey partners;
- More than **250,000 completed** surveys;
- **Multi-page** survey consisting of cascading questions, no mandatory questions, with demographic questions at the beginning;
- **Standardized** question sets for each segment with a limit of 2 segments per survey;
- Common NPS methodology measure for offline and online shopping;
- Implementation of the survey: **August-September 2023**;
- Selected e-commerce segments reflect the industries of YourCX's key projects;
- **Survey partners**: Pharmacy-Melissa, Audioteka, CCC, eobuwie, Leroy Merlin, Modivo, Multikino, Play, Sephora, Super-Pharm;
- The data presented in the report comes from the websites of the survey partners other than the industry partner;
- The survey will be summarized in the form of separate reports for each industry analyzed;

YOUR CUSTOMER EXPERIENCE INDEX

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

Therefore, only extremely good experiences (rating sensationally) as well as very negative ones (dismally and poorly) are taken into account for the calculation of values. In the case of the NPS question, we have the assumption fulfilled by including promoters and detractors.

We treat all four indicators (product accessibility, 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 in the range [0, 250], so that the final score has a value in the range [0, 1000].

intermediate value = %excellent - %poor - %fail
intermediate value NPS = NPS / 100
final value = (intermediate value + 1) * 125
final score = Σ final values

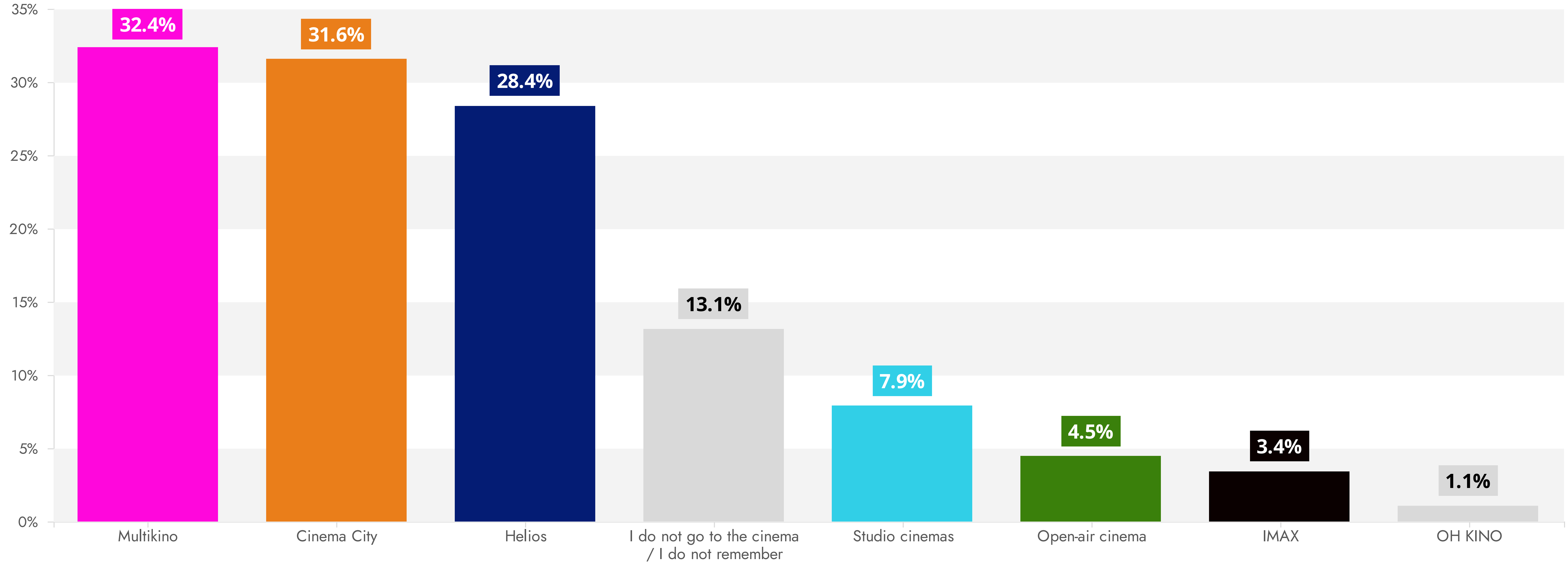
EXAMPLES OF CALCULATIONS FOR COMPANY XYZ

	fatally	poorly	so	good	excellent	intermediate value	final value
Product availability	11%	2%	40%	30%	18%	0,06	**132,5**
Ease of purchase	5%	9%	15%	49%	22%	0,08	**135**
Satisfaction with purchase	1%	3%	28%	31%	37%	0,33	**166,25**
NPS = 40						0,4	**175**
Final result							**608,75**

WHICH CINEMAS HAVE YOU VISITED IN THE LAST 12 MONTHS?

Multiple choice question

n = 10585

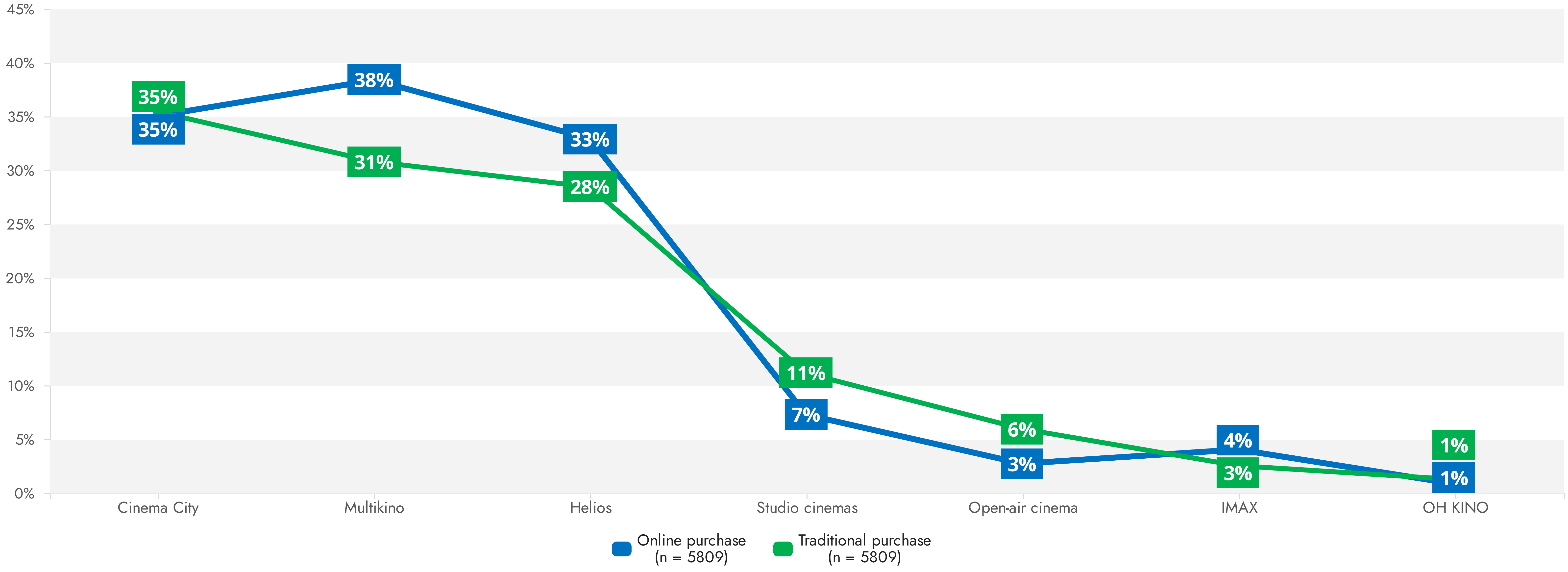


13% of respondents have not visited any cinemas recently. This may be due to the rich offer of movies and series on VOD services. Those who have visited cinemas in the past year most often indicate a visit to one of the cinemas of the three largest chains - Multikino, Cinema City or Helios.

WHICH CINEMAS HAVE YOU VISITED IN THE LAST 12 MONTHS?

Market shares by purchase channel

n = 5809 online purchase, 2915 stationary purchase

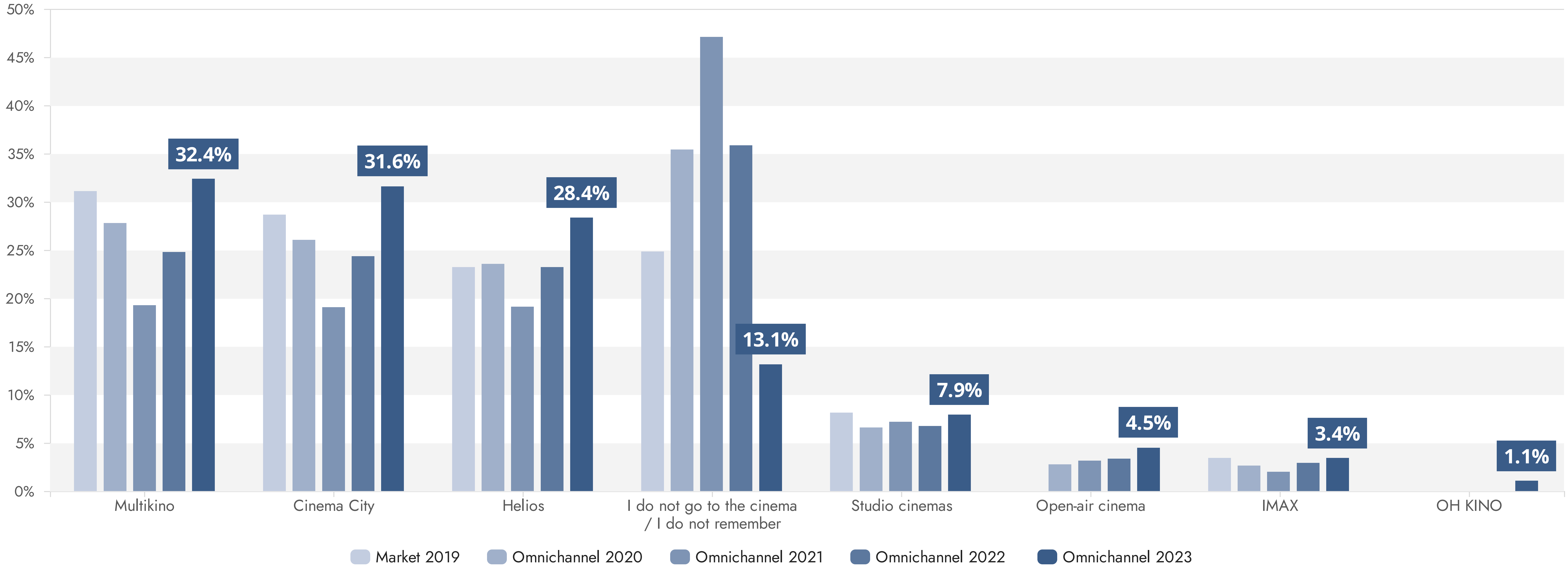


Comparing sales channels, we observe that tickets via the Internet are most often purchased by Multikino visitors, but online purchases are more often chosen only by Multikino, Helios and IMAX customers. The leader in traditional sales is Cinema City.

WHICH CINEMAS HAVE YOU VISITED IN THE LAST 12 MONTHS?

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

n 2019 = 6087, 2020 = 9529, 2021 = 7438, 2022 = 14309, 2023 = 10585

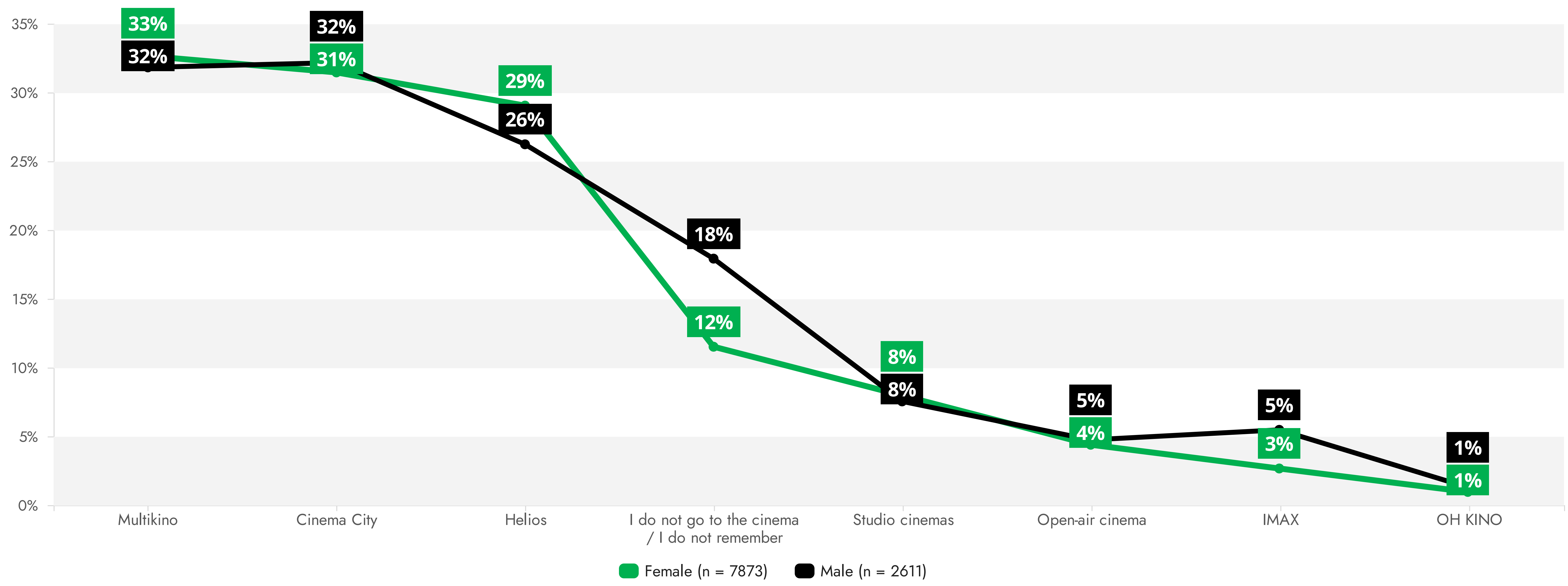


Comparing the results of Omnichannel 2023 with last year's survey, we see an increase in the share of visits to each of the cinema chains (the exception being arthouse cinemas) and a significant decrease (22 p.p.) in "I don't go to the cinema" responses, which is likely due to the removal of pandemic restrictions.

WHICH CINEMAS HAVE YOU VISITED IN THE LAST 12 MONTHS?

Analysis by gender

n = 10484

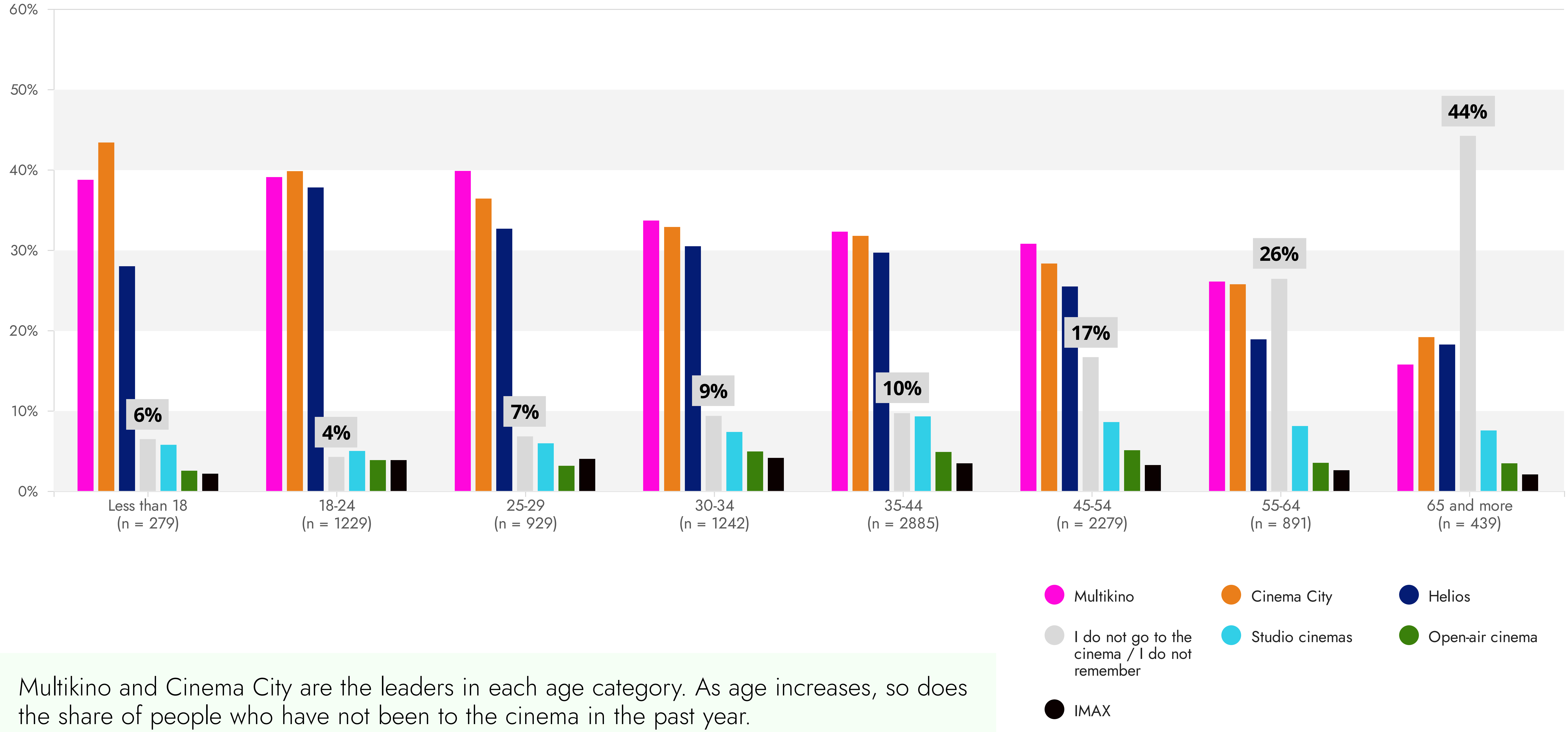


Men were more likely to indicate that they don't go, or can't remember which cinema they went to.

WHICH CINEMAS HAVE YOU VISITED IN THE LAST 12 MONTHS?

Analysis by age

n = 10173

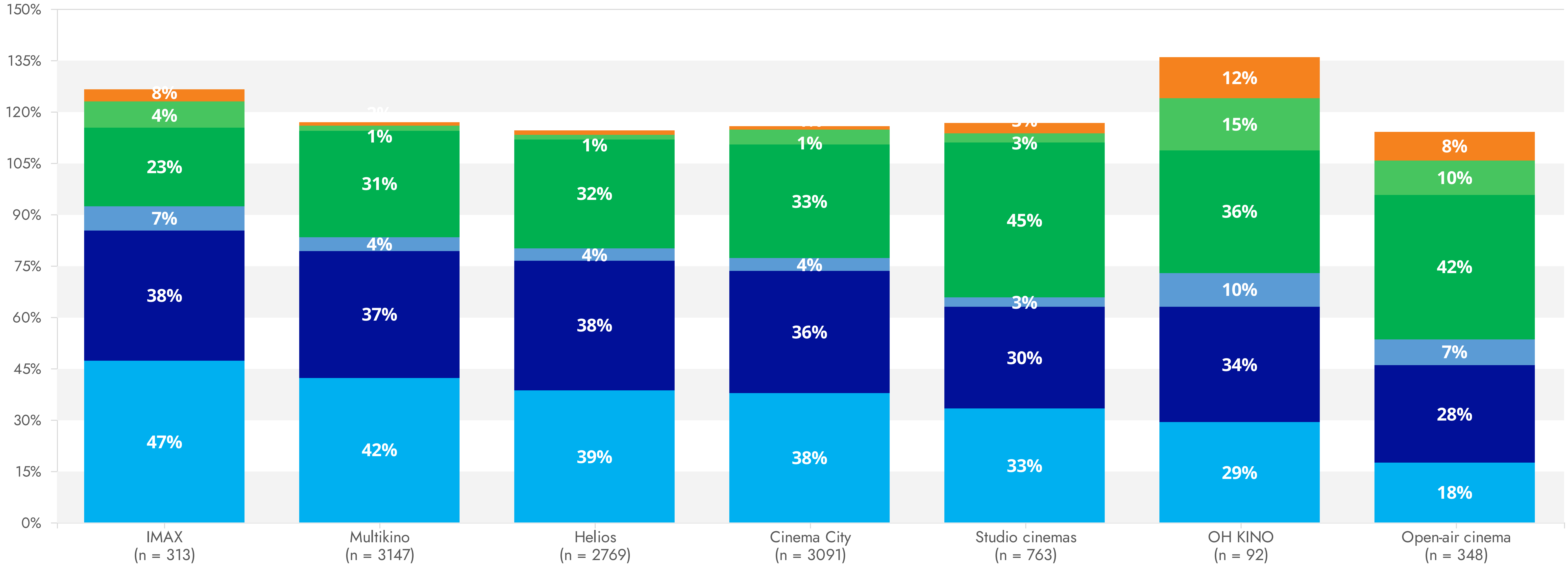


Multikino and Cinema City are the leaders in each age category. As age increases, so does the share of people who have not been to the cinema in the past year.

HOW DID YOU BUY THE TICKETS?

Purchasing channel of choice - multiple choice question

n = 8517



In the case of arthouse and outdoor cinemas, we are more likely to purchase a ticket directly at the venue rather than online. In the vast majority of cases, online purchase is preferred. On average, one in four people chooses to book online and purchase tickets at the cinema.

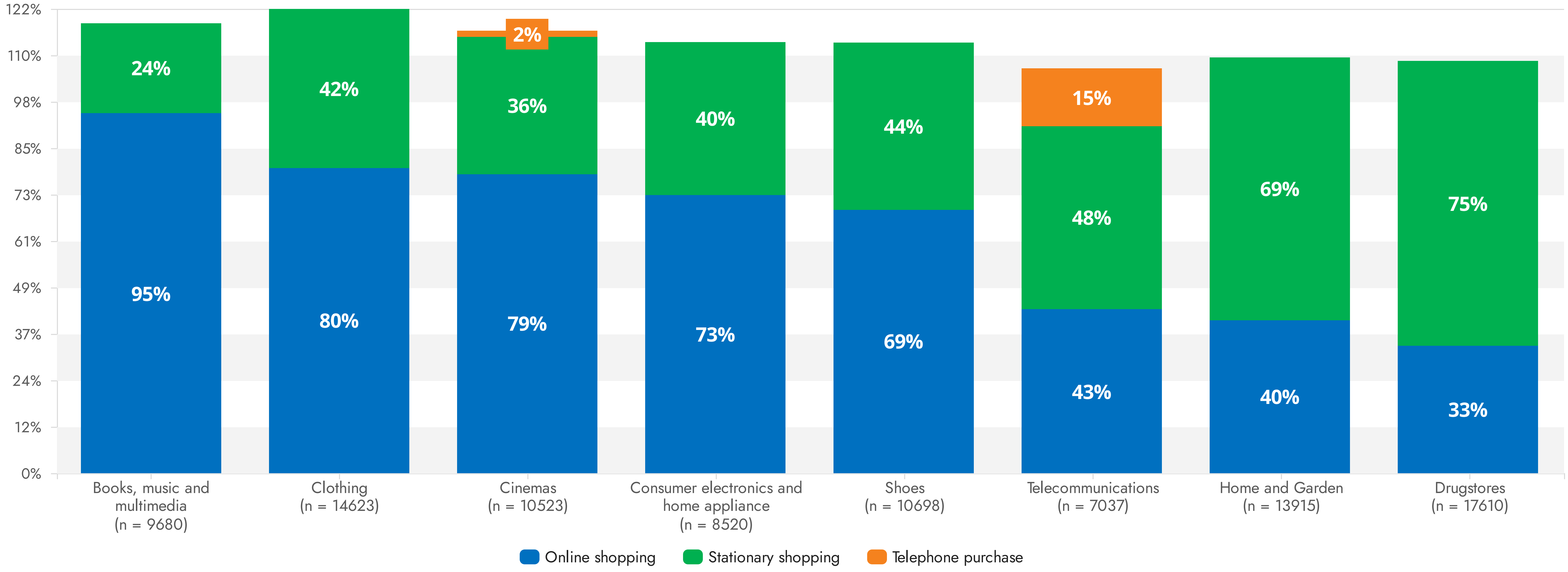
HOW DID YOU BUY THE TICKETS?

Purchasing channel of choice - Omnichannel 2023 with changes from 2022. In 2023 there was a change from single choice to multiple choice

	Buying online	Booking online	Via mobile application	At the cinema counter	In the automatic booth in the cinema hall	By telephone	Result count
Multikino	42.2% +5pp	37.1% +9.7pp	4% +1.5pp	31.1% +0.6pp	1.5% -0.2pp	1% +0.4pp	3147
Cinema City	37.8% +2.8pp	35.7% +6.6pp	3.8% +2pp	33.2% +3.5pp	4.3% +0.7pp	1% +0.2pp	3091
Helios	38.6% +1.9pp	37.8% +8.8pp	3.6% +0.9pp	31.9% +2.2pp	1.3% -0.1pp	1.3%	2769
Studio cinemas	33.3% +0.9pp	29.8% +9.6pp	2.8% +1.7pp	45.2% +3.9pp	2.6% +0.1pp	3% +0.5pp	763
Open-air cinema	17.5% -0.8pp	28.4% +3.7pp	7.5% +3.6pp	42.2% +2.9pp	10.1% +1.1pp	8.3% +3.5pp	348
IMAX	47.3% +7.9pp	38% +5.6pp	7% +3.1pp	23% +4.8pp	7.7% +3.8pp	3.5% +1.3pp	313
OH KINO	29.3%	33.7%	9.8%	35.9%	15.2%	12%	92

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

Comparison of channels chosen between industries

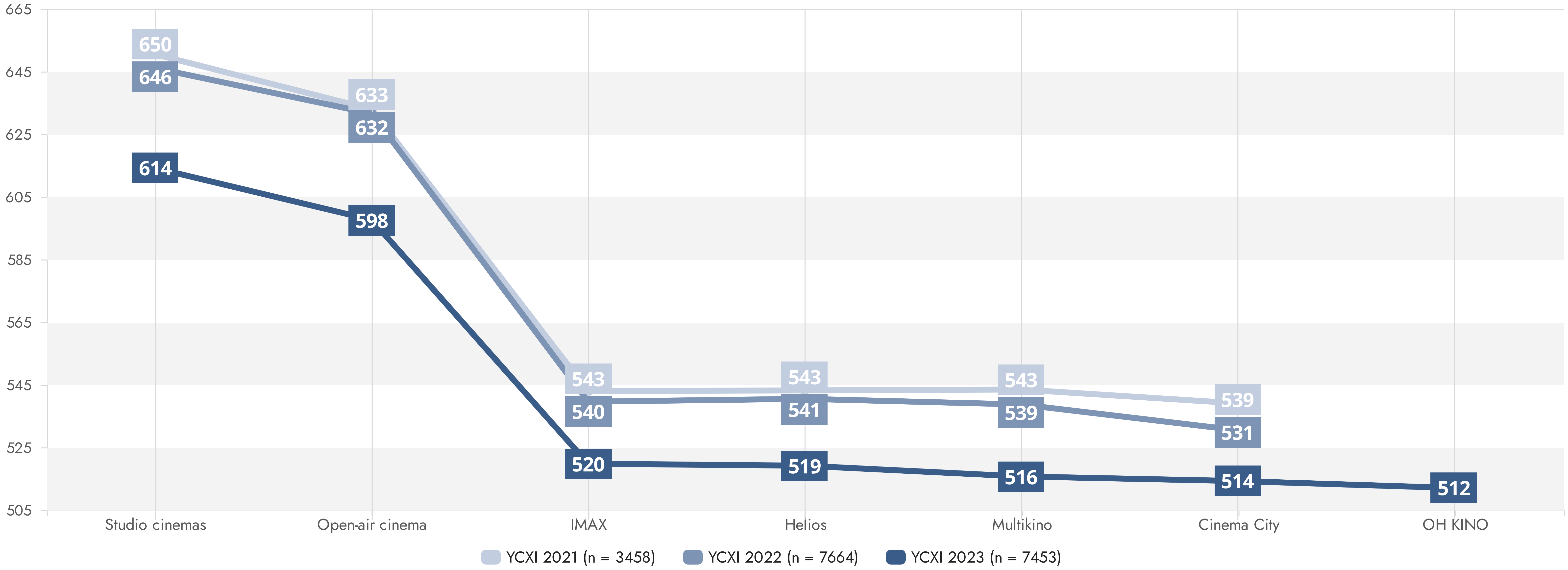


Comparing the methods of purchasing cinema tickets with the industries surveyed in Omnichannel 2023 shows how important well-functioning online sales are for this sector. In the cinema industry, the ability to purchase tickets by phone is still in place (although few respondents use this method).

EXPERIENCE QUALITY INDICATORS

YOUR CUSTOMER EXPERIENCE INDEX

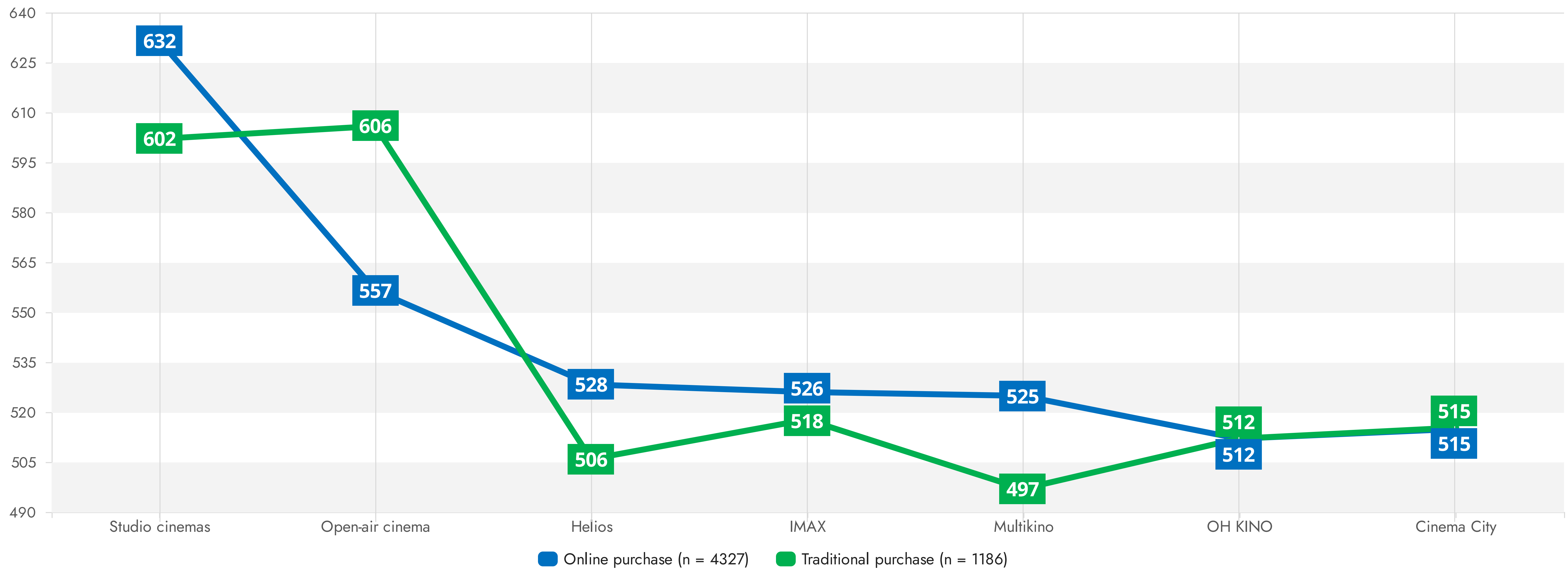
Quality index on a scale of 0 to 1000 taking into account four satisfaction factors:
attractiveness of ticket prices and food, ease of booking and purchasing tickets, satisfaction with the cinema visit, willingness to recommend the cinema to friends



The Your Customer Experience Quality Index is designed to more easily differentiate between companies scoring similarly on sub-questions as well as to identify real quality leaders on a scale of 0 to 1,000. As you can see, there is still potentially a lot of work to be done, since companies scored just over half of the possible points. The industry leaders are once again outdoor and studio cinemas. This year, all cinema chains recorded a decline in the index value.

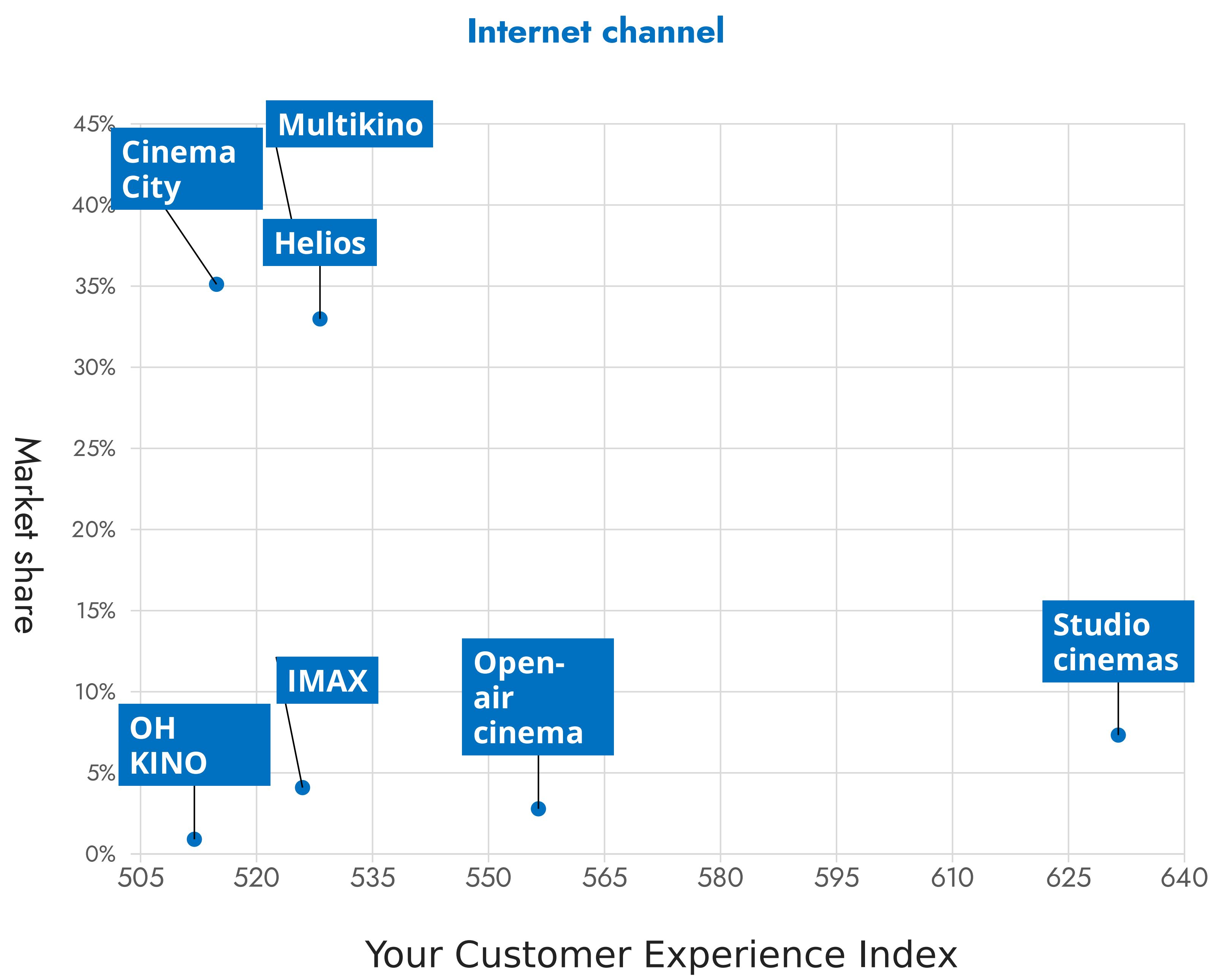
YOUR CUSTOMER EXPERIENCE INDEX

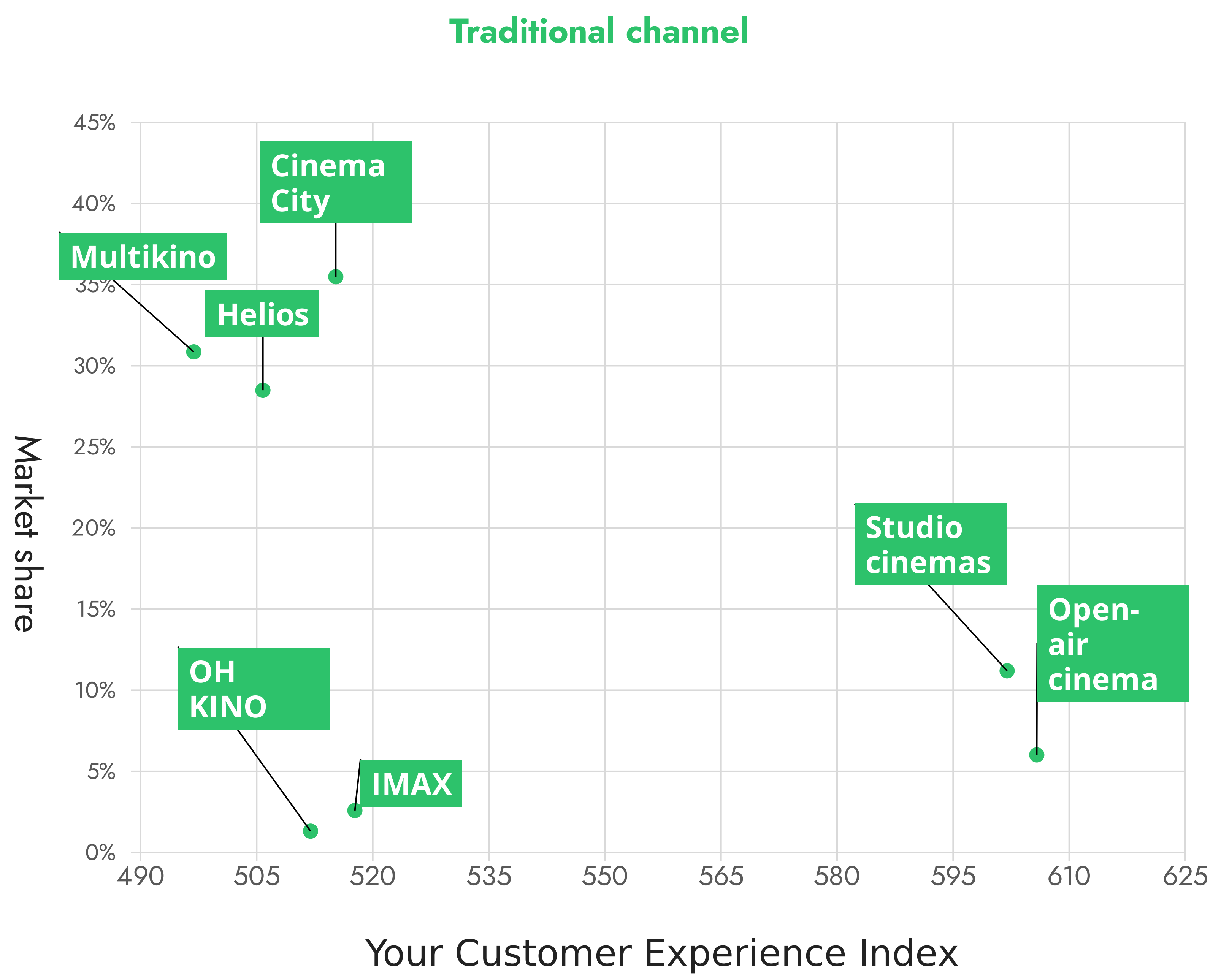
Quality index on a scale of 0 to 1000, broken down by purchasing channel



Studio cinemas boast the highest quality rating in the online channel, while outdoor cinemas have the highest quality rating in the offline channel. In most cinemas, respondents rate the experience better when purchasing tickets in the online channel.

YOUR CUSTOMER EXPERIENCE INDEX

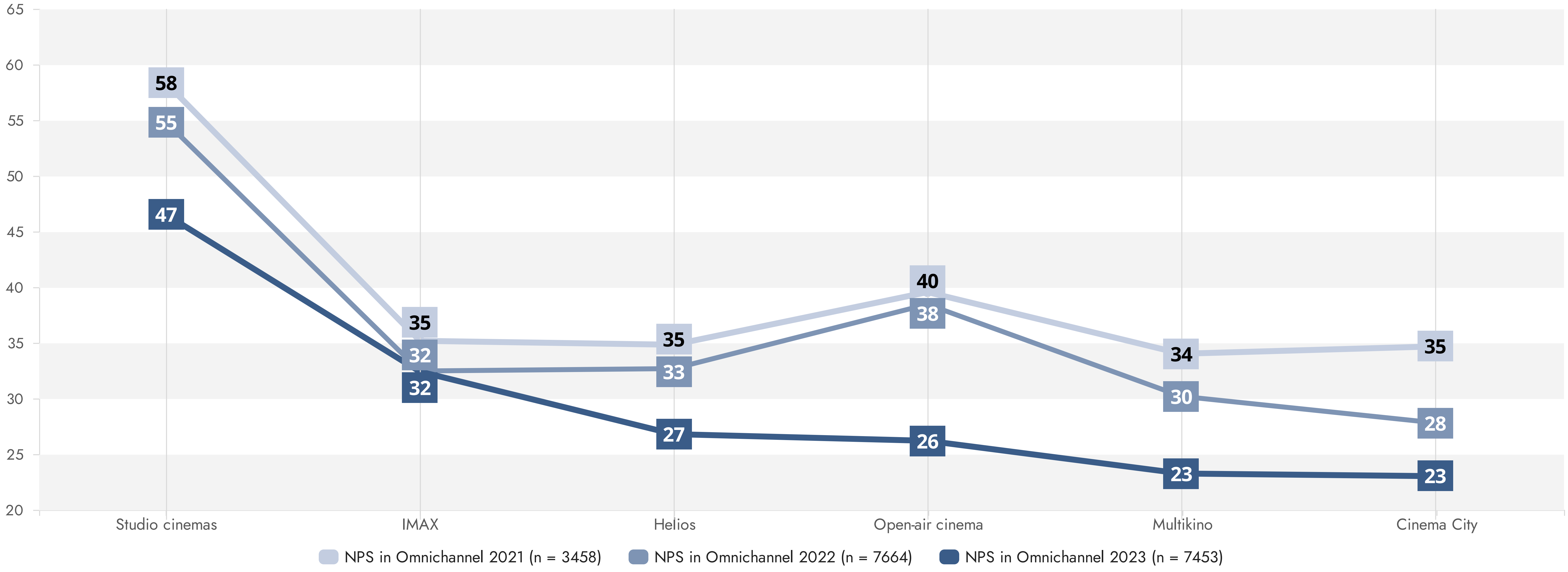




The charts show market shares by sales channel and Your Customer Experience Index values. The online sales channel is dominated by Multikino and the stationary sales channel is dominated by Cinema City, which has the largest share of each market.

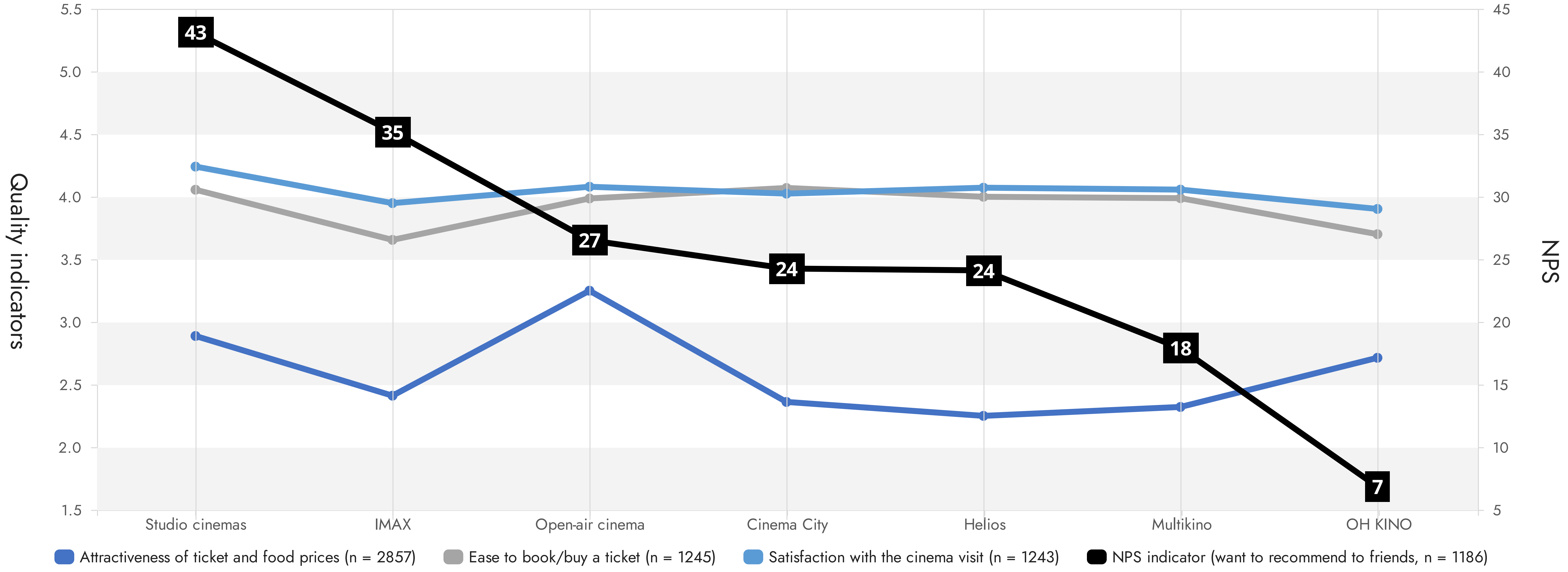
HOW LIKELY ARE YOU TO RECOMMEND THESE CINEMAS TO YOUR FRIENDS?

Comparison of NPS index values against last year's survey.



TRADITIONAL CHANNEL - EXPERIENCE QUALITY RATINGS

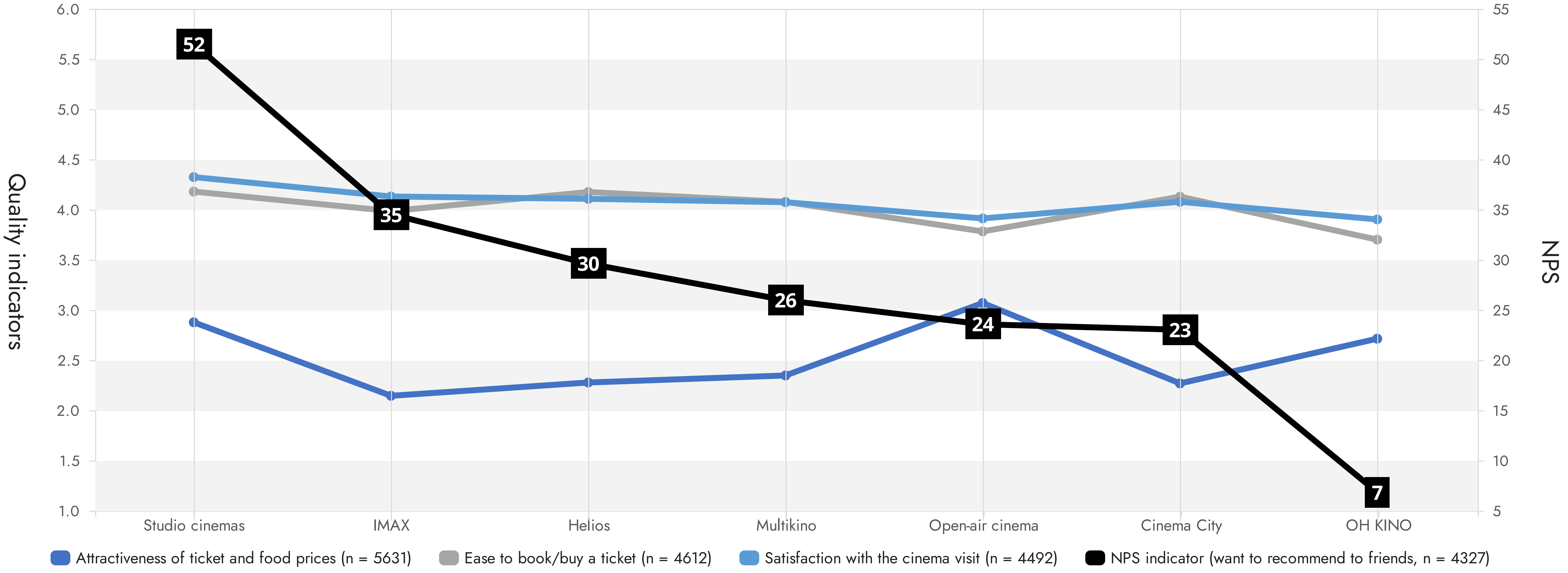
Quality ratings on a scale of 1 to 5 and NPS index on a scale of -100 to 100



We note the highest satisfaction, willingness to recommend or price appeal not for chain cinemas, but for studio cinemas or outdoor events. These are the places we are most likely to recommend to family and friends.

ONLINE CHANNEL - EXPERIENCE QUALITY RATINGS

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



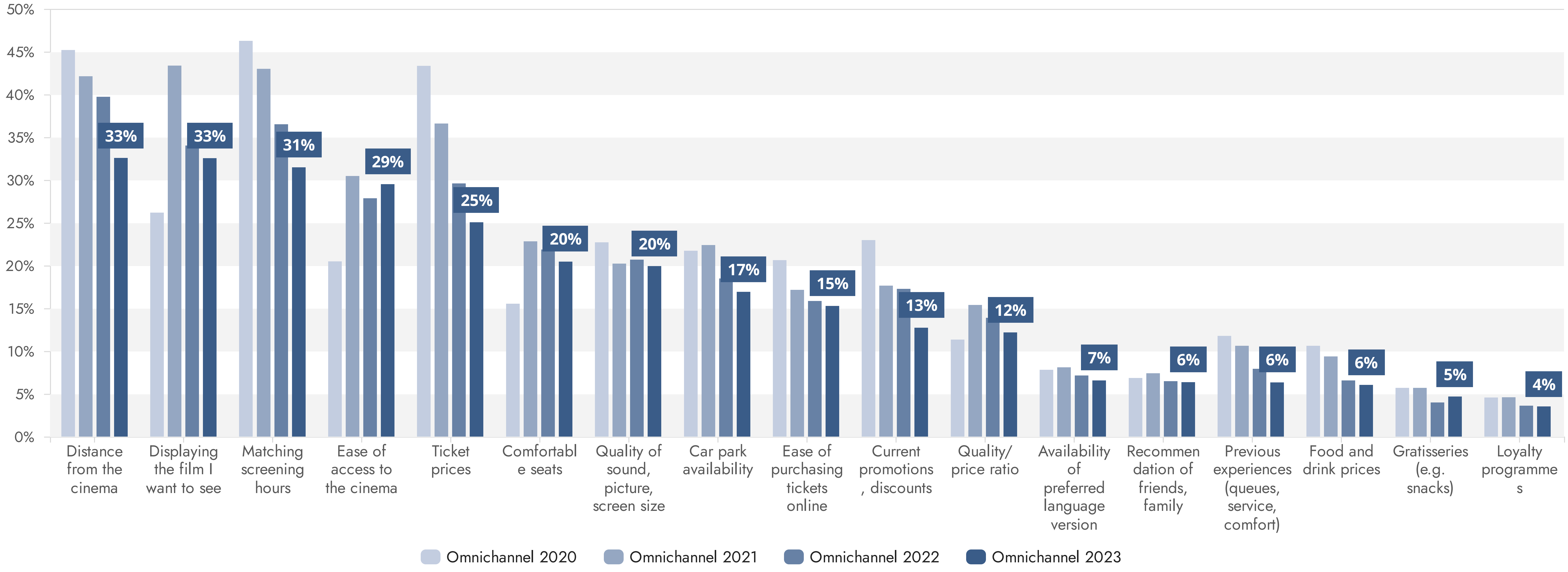
Analyzing individual aspects of the experience against the NPS indicator, we observe the strength of studio cinemas, where a high rating for attractiveness of prices and ease of purchase correlates with a high likelihood of recommending the brand to friends.

AUDIENCE BEHAVIOR AND PREFERENCES

WHAT IS DECISIVE FOR THE CHOICE OF CINEMA?

Multiple choice question

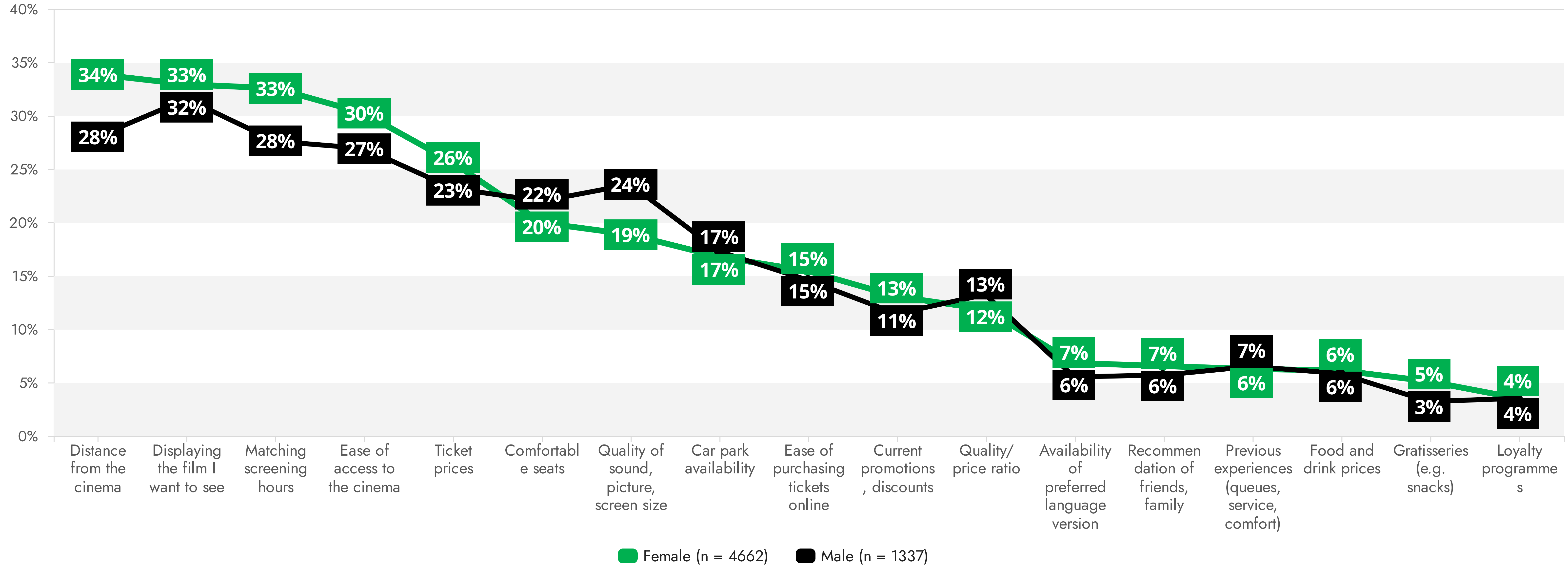
n 2020 = 4689, 2021 = 3074, 2022 = 6510, 2023 = 6053



WHAT IS DECISIVE FOR THE CHOICE OF CINEMA?

Multiple choice question - Analysis by gender

n = 5999

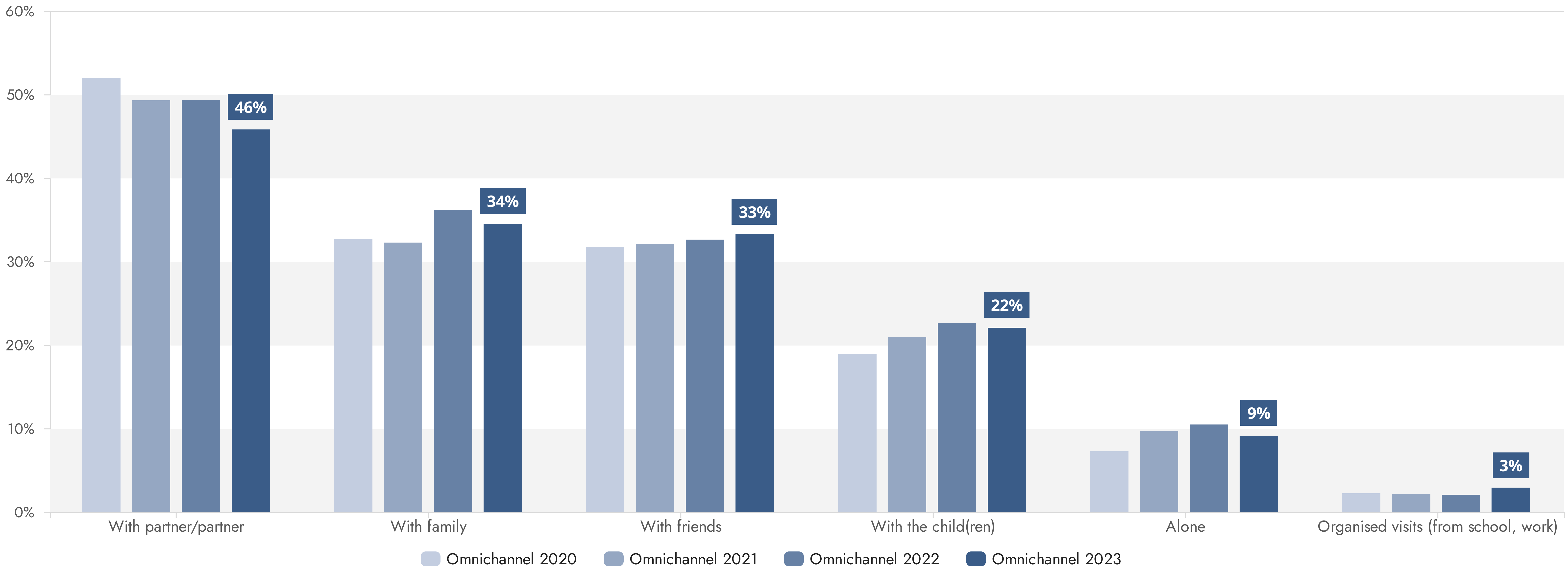


Regardless of gender, the most important factors in choosing a movie theater are the distance from the theater, appropriate screening times, and repertoire suitable for the respondent. Men pay more attention to comfortable seats, sound and picture quality.

WHO DO YOU GO TO THE CINEMA WITH MOST OFTEN?

Multiple choice question

n 2021 = 3005, 2022 = 5932, 2023 = 5512

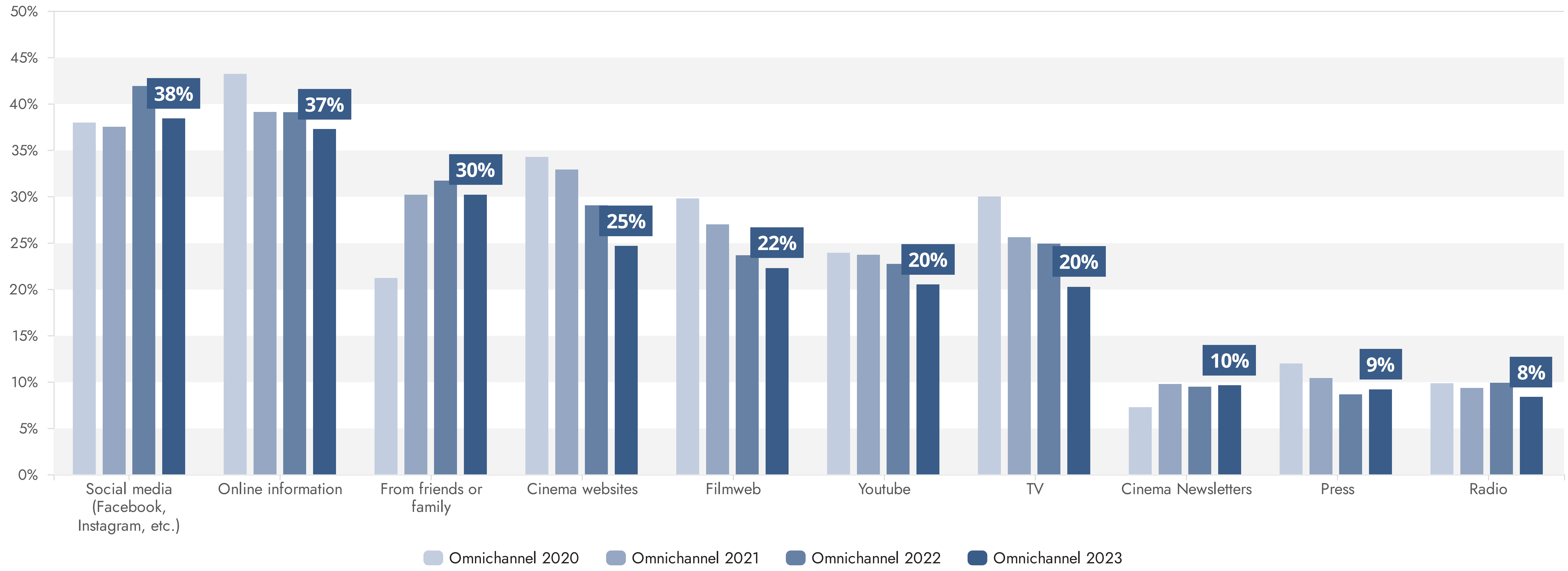


Relative to last year, we note no major changes. One can note an increase in the share of "with friends/acquaintances" responses.

HOW DO YOU KNOW ABOUT FILMS AND PREMIERES?

Multiple choice question

n 2020 = 3904, 2021 = 2822, 2022 = 5457, 2023 = 5124



Relative to previous editions of the survey, we note a decrease in the share of indications for cinema websites. A gentle increase is observed for cinema newsletters. It is worth noting that almost all sources are decreasing their share this year.

HOW DO YOU KNOW ABOUT FILMS AND PREMIERES?

Multiple choice question - analysis by age

n = 4960

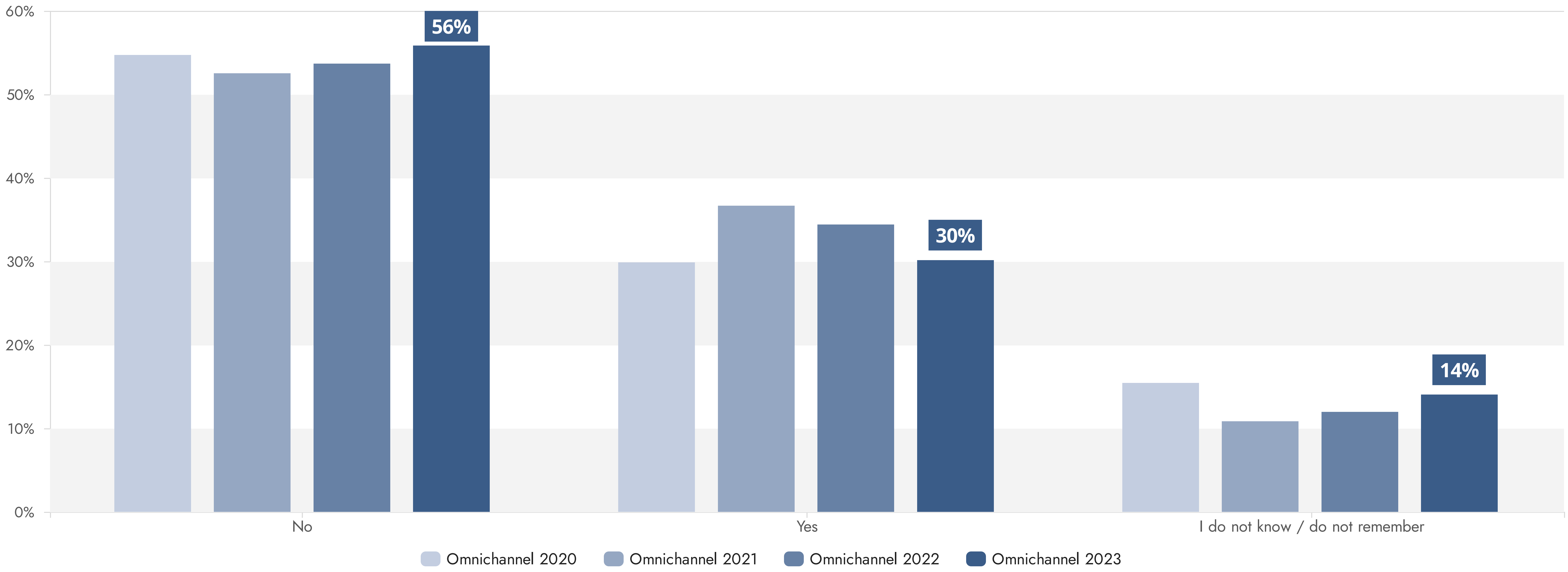
	Social media (Facebook, Instagram, etc.)	Online information	From friends or family	Cinema websites	Filmweb	Youtube	TV	Cinema Newsletters	Press	Radio	Result count
Less than 18	50%	23.64%	35.45%	34.55%	7.27%	35.45%	22.73%	11.82%	7.27%	7.27%	110
18-24	60.25%	28.3%	29.73%	27.03%	15.1%	36.57%	16.85%	8.43%	5.88%	3.02%	629
25-29	53.3%	33.26%	28.36%	23.24%	24.52%	31.77%	18.12%	8.53%	4.26%	6.82%	469
30-34	45.58%	34.14%	28.42%	25.13%	29.29%	25.13%	22.53%	6.24%	5.03%	8.32%	577
35-44	36.41%	36.14%	26.97%	24.85%	24.5%	17.18%	19.78%	9.51%	7.87%	8.49%	1461
45-54	28.98%	43.87%	32.66%	25.22%	23.99%	13.4%	21.72%	11.03%	11.73%	10.16%	1142
55-64	21.93%	45.78%	37.11%	20%	20.48%	12.53%	20.24%	13.73%	17.35%	10.6%	415
65 and more	17.2%	41.4%	35.03%	26.11%	8.92%	8.92%	22.29%	7.64%	19.11%	12.74%	157

Younger people get their information about movies primarily from social media. Customers in the 35-64 range are guided by what they see on online news sites.

DID YOU LOOK FOR INFORMATION ON THE INTERNET LAST TIME BEFORE CHOOSING WHICH CINEMA YOU WILL GO TO?

Single-choice question

n 2020 = 5260, 2021 = 3378, 2022 = 7412, 2023 = 7010

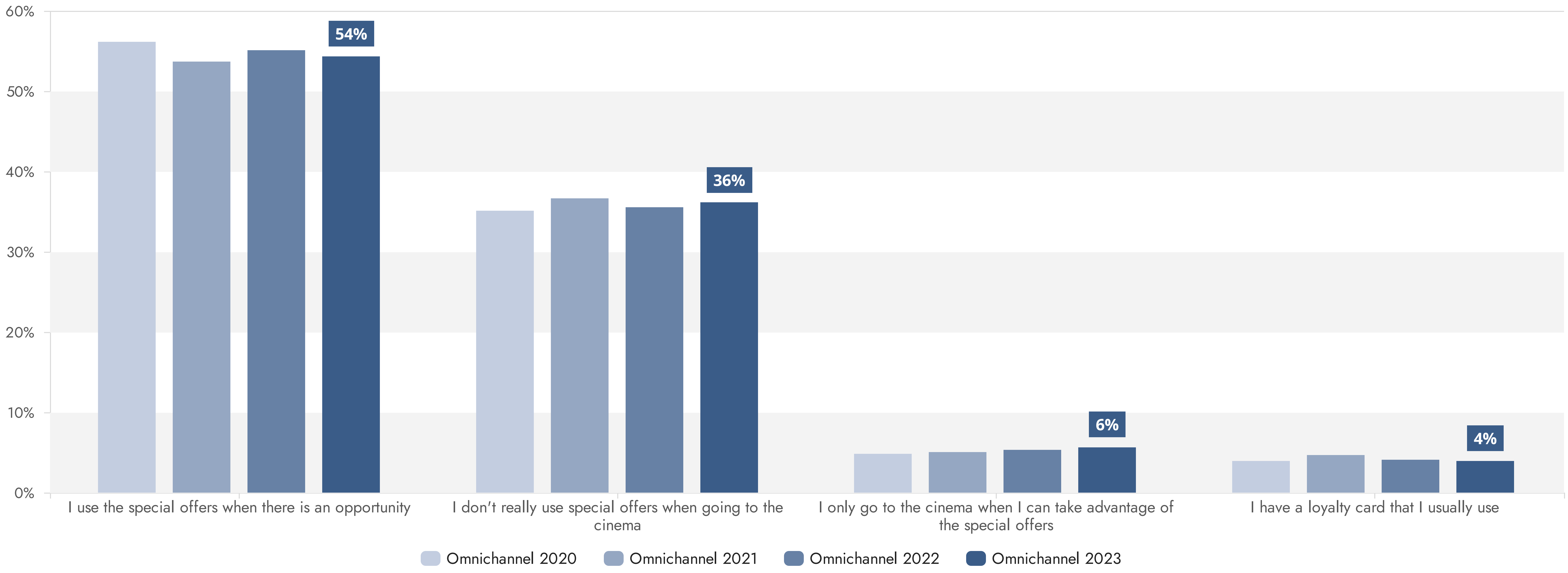


Compared to last year's survey, we see a decrease in the share of people who look online for information about the cinema before going to a screening.

HOW IMPORTANT ARE CURRENT SPECIAL OFFERS FOR YOU?

Single-choice question

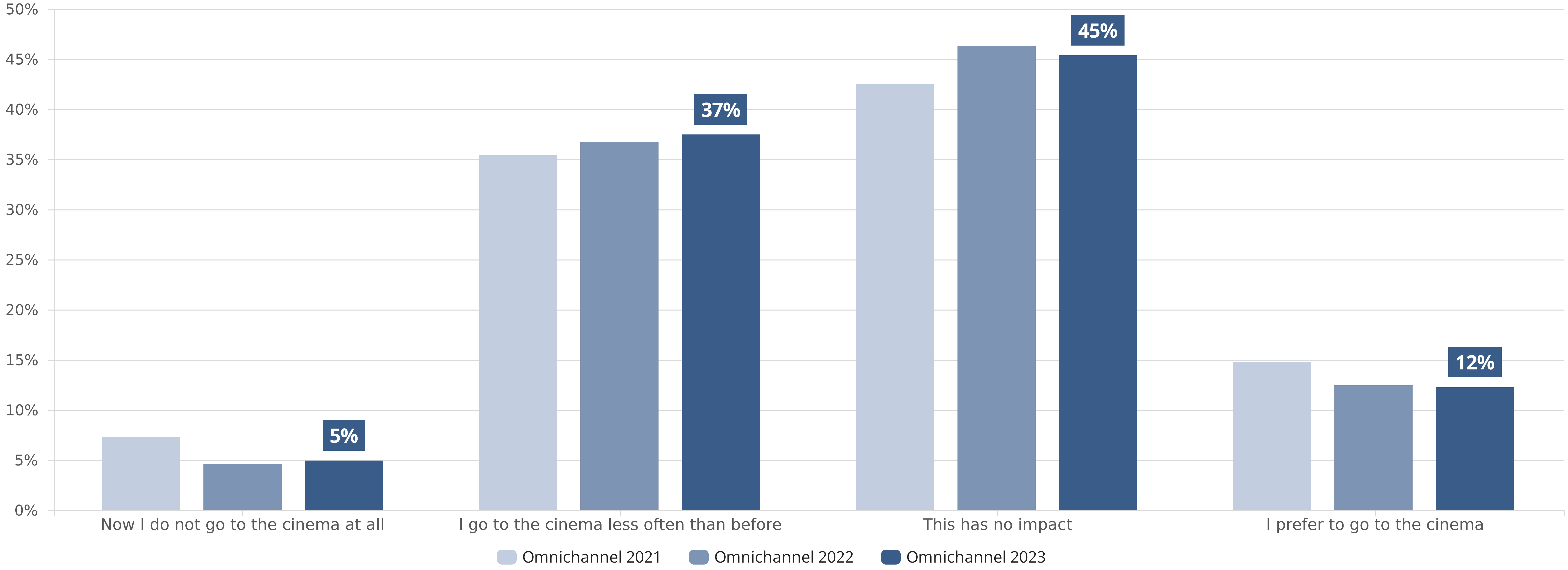
n 2020 = 4322, 2021 = 2831, 2022 = 5528, 2023 = 5188



DOES THE INCREASING EASE OF ACCESS TO MOVIES AND SERIES ON THE INTERNET AFFECT THE FREQUENCY OF YOUR VISITS TO THE CINEMA?

Single-choice question

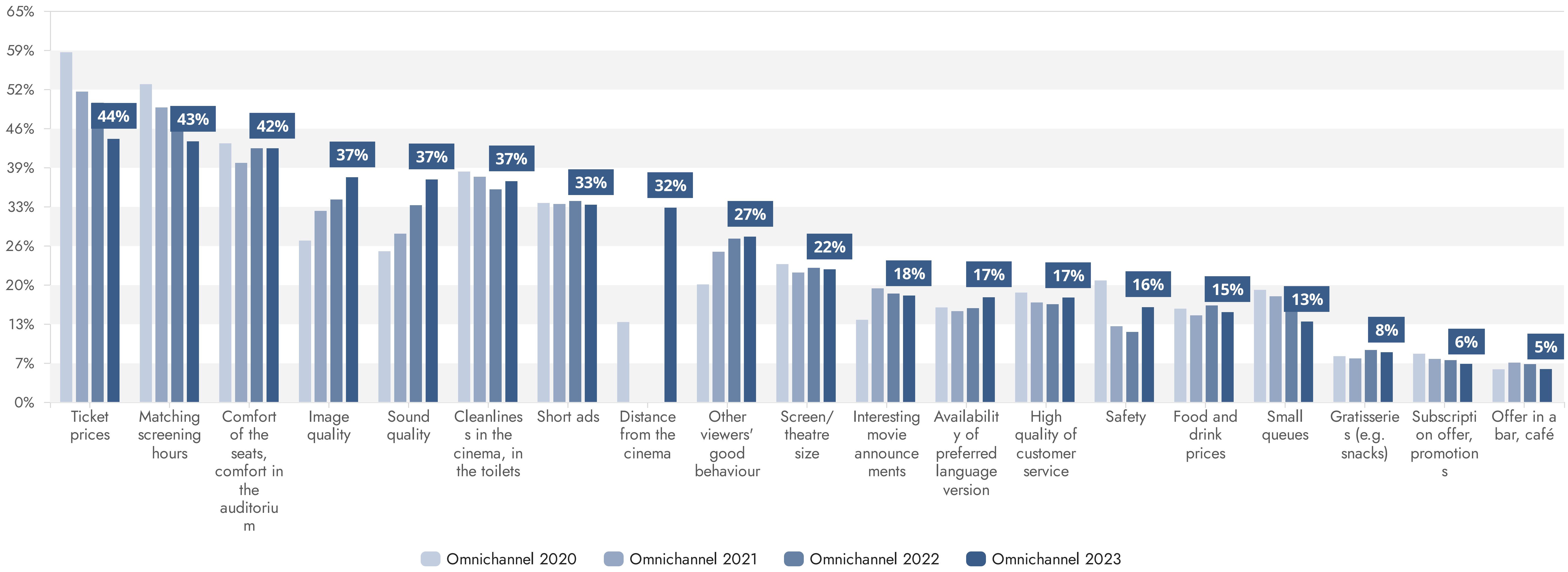
n 2021 = 2933, 2022 = 5697, 2023 = 5349



WHAT IS MOST IMPORTANT TO YOU DURING YOUR VISIT TO THE CINEMA?

Multiple choice question

n 2020 = 3532, 2021 = 2368, 2022 = 4396, 2023 = 4287

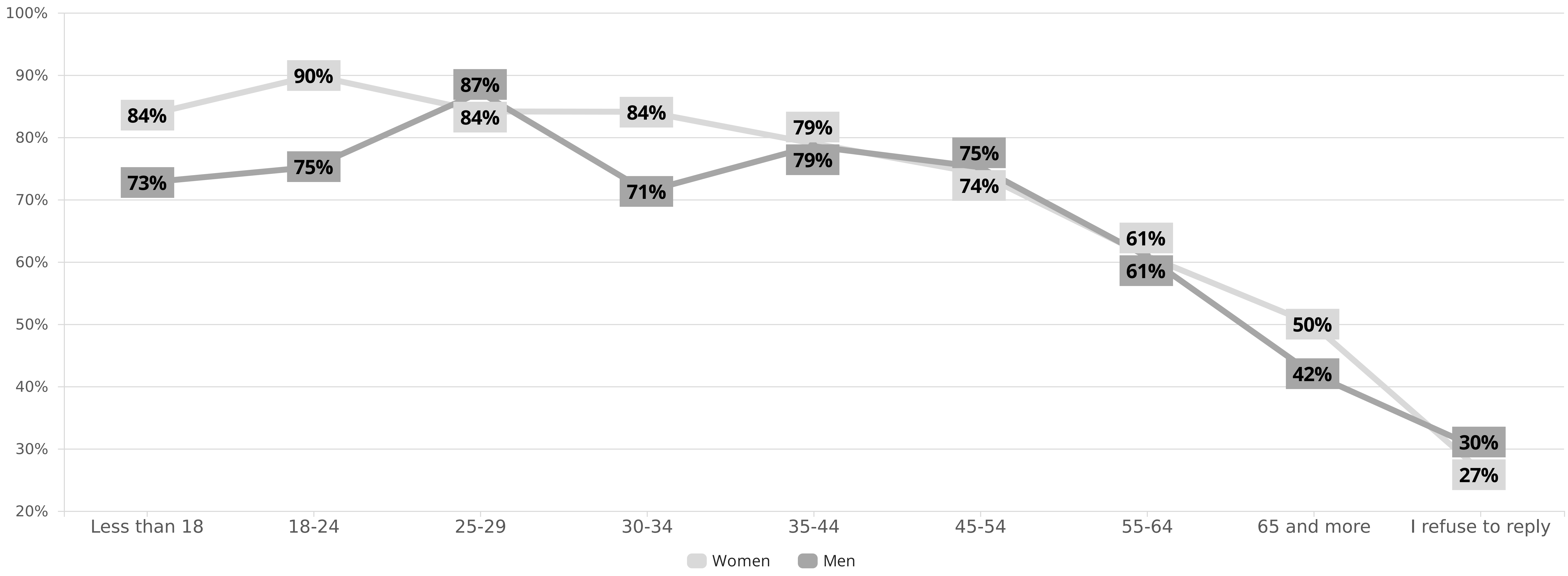


The most important aspects of a visit to the cinema were ticket prices, matching movie times, comfortable seats and the quality of the picture, sound and cleanliness throughout the cinema. The least important (less than 10% of respondents' indications) were found to be the range of products/dishes available at the cinema bars, the subscription offer and freebies.

DO YOU USE STREAMING PLATFORMS (NETFLIX, HBO MAX, ETC.) TO WATCH VIDEO CONTENT?

Single-choice question - Analysis by gender

n women = 4182, men = 1399



Women are more likely than men to say they use streaming platforms to watch video content.

HOW OFTEN DO YOU GO TO THE CINEMA?

One-choice question - analysis by frequency of use of streaming platforms

n = 3222

	At least once a week	Several times a month	Once a month	Once every 2-3 months	Once every six months	Once a year	Rarer	Result count
Daily	2.4%	7.3%	21.9%	32.7%	23.9%	6.4%	5.5%	1130
Several times a week	1.3%	8.9%	19.2%	35.8%	24.1%	6.5%	4.2%	1253
Once a week	0.6%	6.7%	17.4%	30.9%	29.7%	11.3%	3.4%	327
Several times a month	0.3%	6.2%	14.4%	39.4%	23.8%	7.4%	8.5%	353
Once a month	0.9%	4.7%	17%	34.9%	30.2%	8.5%	3.8%	106
Once every 3 months	0%	1.9%	11.3%	41.5%	18.9%	17%	9.4%	53
I use streaming less often	1.8%	3.6%	10.9%	30.9%	21.8%	20%	10.9%	55

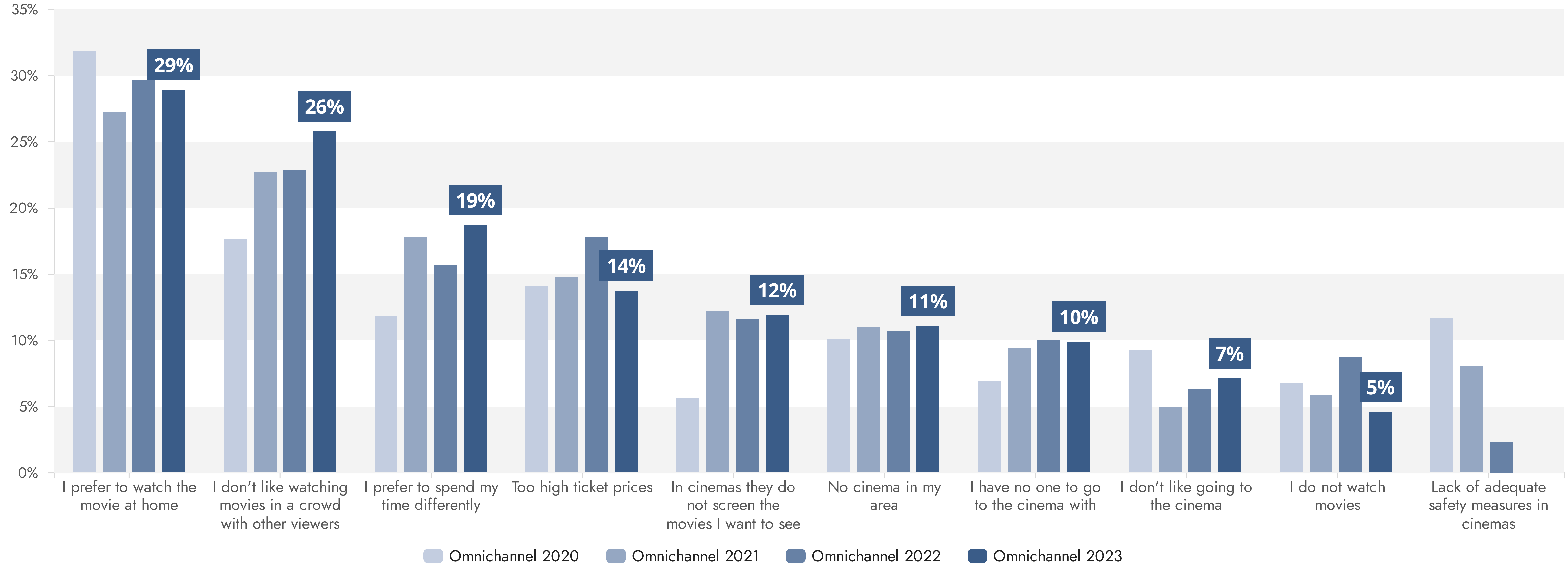
Frequent streaming users are less likely to go to the movies than infrequent streaming users.

NON-CINEMA GOERS

WHY DON'T YOU BUY CINEMA TICKETS?

Multiple choice question

n 2020 = 2953, 2021 = 3164, 2022 = 4305, 2023 = 1180



The price of the ticket is the aspect by which 18% of respondents do not go to the cinema. Although financial barriers are less and less important, - it is worth noting that over the past years the share of responses has been increasing. However, respondents now indicate that they prefer to watch a movie at home and do not want to be in a cinema hall in a crowd of strangers.

IS THAT ALL THAT THE STUDY WAS ABLE TO FIND OUT?

Definitely not! Only selected areas are covered in the report. On the other hand, throughout the survey we still addressed issues such as:

- Co-occurrence of brands chosen by respondents
- Reasons for not wanting to recommend particular cinemas
- Reasons for going to the cinema
- Frequencies of visits and amounts spent
- Ways of spending time
- Preferred methods of contact with cinemas
- Use of streaming platforms and their impact on cinema visits

All results can be analyzed due to any other question included in the survey, whether demographic (gender, age, education, full geographic analysis), preference or any other evaluation question.

Those interested in deeper analysis are welcome to visit our ocean of knowledge for mining these most valuable gems.

SUMMARY OF THE STUDY

08-09 2023

Survey conducted in August and September 2023

250 thousand

More than 250,000 people completed the survey

10

We examined nine product segments


Cinemas


Clothes

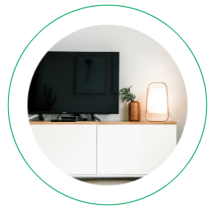

Drugstores


Footwear


Pharmacies


Telecommunicatio


Home and garden


CONSUMER ELECTRONICS


Books, multimedia


Subscription media (Streaming, VOD, Audiobooks).

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Subsequent reports will be published on the YourCX

Those interested in additional analysis and research are welcome to contact and cooperate!

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