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

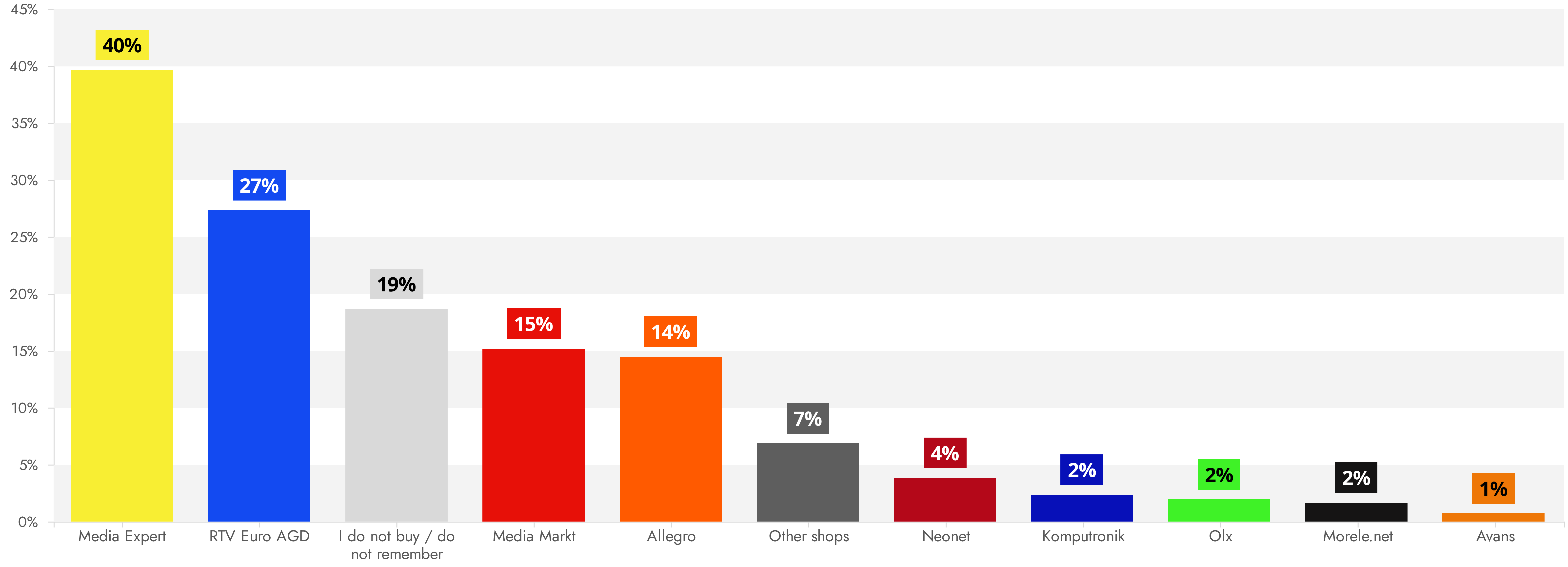
EXAMPLES OF CALCULATIONS FOR COMPANY XYZ

	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**

WHERE HAVE YOU RECENTLY PURCHASED ELECTRONIC CONSUMER ELECTRONICS OR HOUSEHOLD APPLIANCES?

Multiple choice question

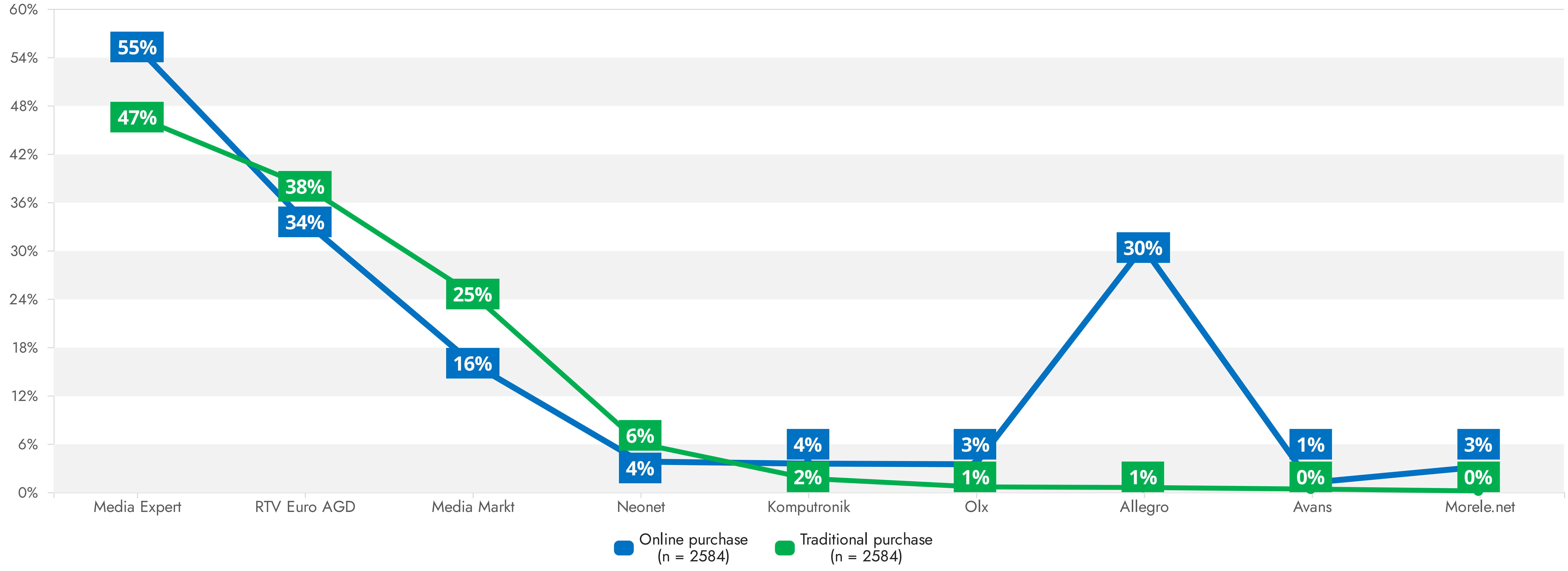
n = 8914



WHERE HAVE YOU RECENTLY PURCHASED ELECTRONIC CONSUMER ELECTRONICS OR HOUSEHOLD APPLIANCES?

Market shares by purchase channel

n = 3636 online purchase, 2584 stationary purchase

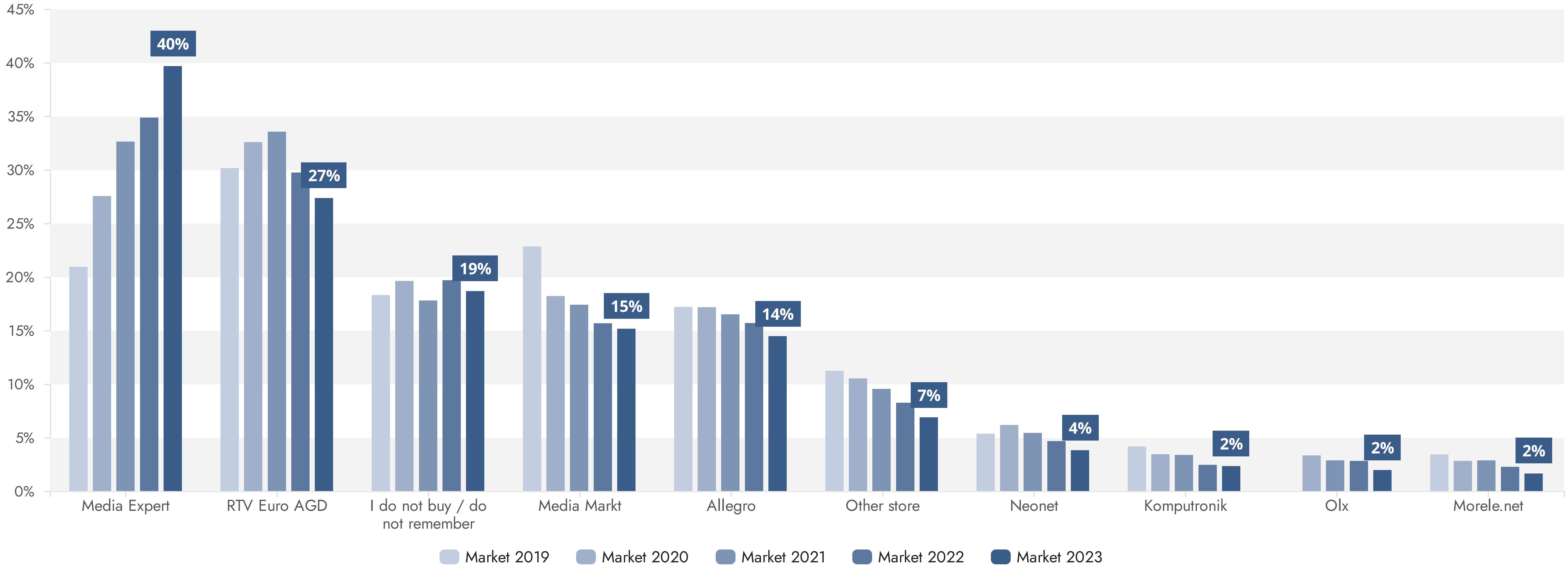


Depending on the store where respondents purchase consumer electronics/appliances, shopping channel preferences are distributed differently. In the online channel, the leaders are Media Expert and RTV Euro AGD, who are also leaders in traditional sales.

WHERE HAVE YOU RECENTLY PURCHASED ELECTRONIC CONSUMER ELECTRONICS OR HOUSEHOLD APPLIANCES?

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

n 2019 = 5859, 2020 = 6224, 2021 = 8565, 2022 = 10389, 2023 = 8914

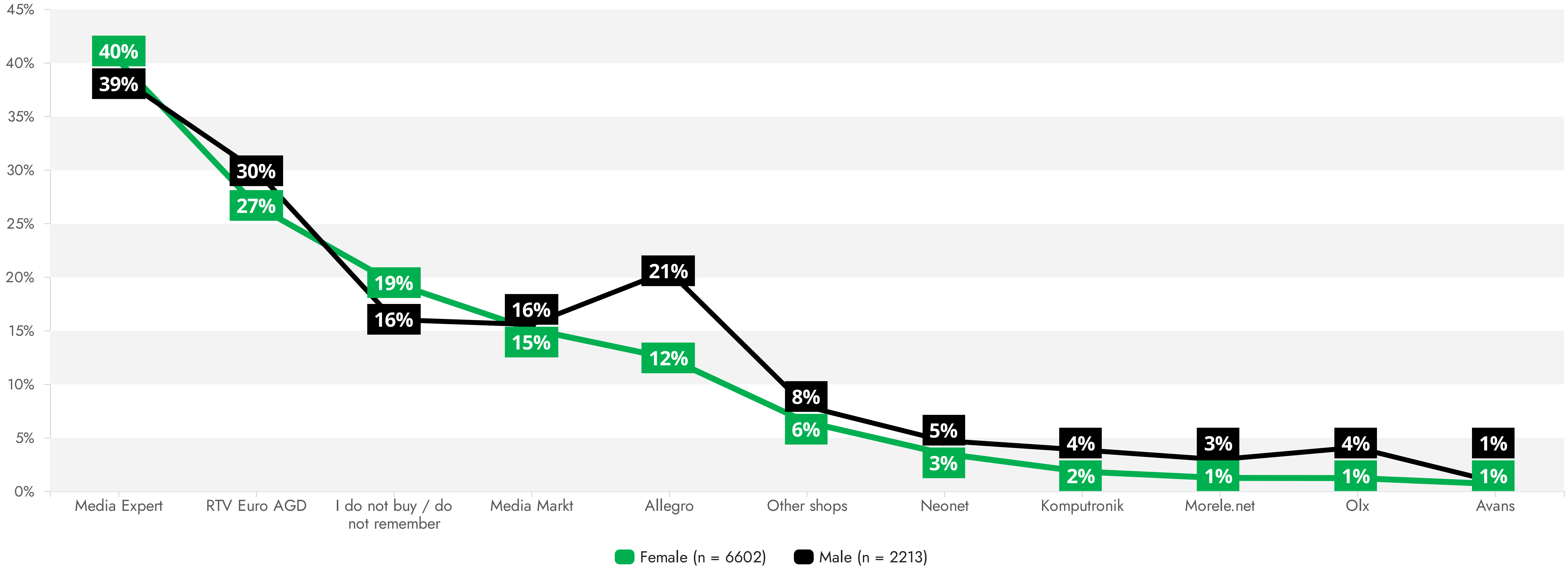


Comparing the results of Omnichannel 2023 with last year's survey, we see a clear increase in the share of shopping at Media Expert. At the same time, a steady decline in the share of shopping in other stores is noticeable.

WHERE HAVE YOU RECENTLY PURCHASED ELECTRONIC CONSUMER ELECTRONICS OR HOUSEHOLD APPLIANCES?

Analysis by gender

n = 8815



Men are more likely to buy these types of products than women, which is hardly surprising, but regardless of gender for purchases we usually head to Media Expert or RTV Euro AGD chain stores. Men are much more likely to choose to shop on the Allegro platform, while women are more likely to not buy or not remember buying electronic equipment.

WHERE HAVE YOU RECENTLY PURCHASED ELECTRONIC CONSUMER ELECTRONICS OR HOUSEHOLD APPLIANCES?

Analysis by gender in 2023 with changes relative to 2022

n 2022 = 10155, n 2023 = 8815

	Media Expert	RTV Euro AGD	I do not buy / do not remember	Media Markt	Allegro	Other shops	Neonet	Komputronik	Morele.net	Olx	Avans	Result count
Female	40.2% +4.6pp	26.6% -2.5pp	19.4% -1.4pp	15.1% -0.6pp	12.4% +0.4pp	6.5% -0.7pp	3.5% -0.7pp	1.8%	1.2% -0.5pp	1.2% -0.9pp	0.7% -0.2pp	6602
Male	38.7% +4.2pp	29.9% -1.9pp	16% -0.4pp	15.5% -0.7pp	20.6% -4.2pp	7.9% -2.3pp	4.7% -0.9pp	3.8% -0.1pp	2.9% -0.6pp	4.1% -0.3pp	0.9% -0.2pp	2213

WHERE HAVE YOU RECENTLY PURCHASED ELECTRONIC CONSUMER ELECTRONICS OR HOUSEHOLD APPLIANCES?

Analysis by province in 2023 with changes relative to 2022

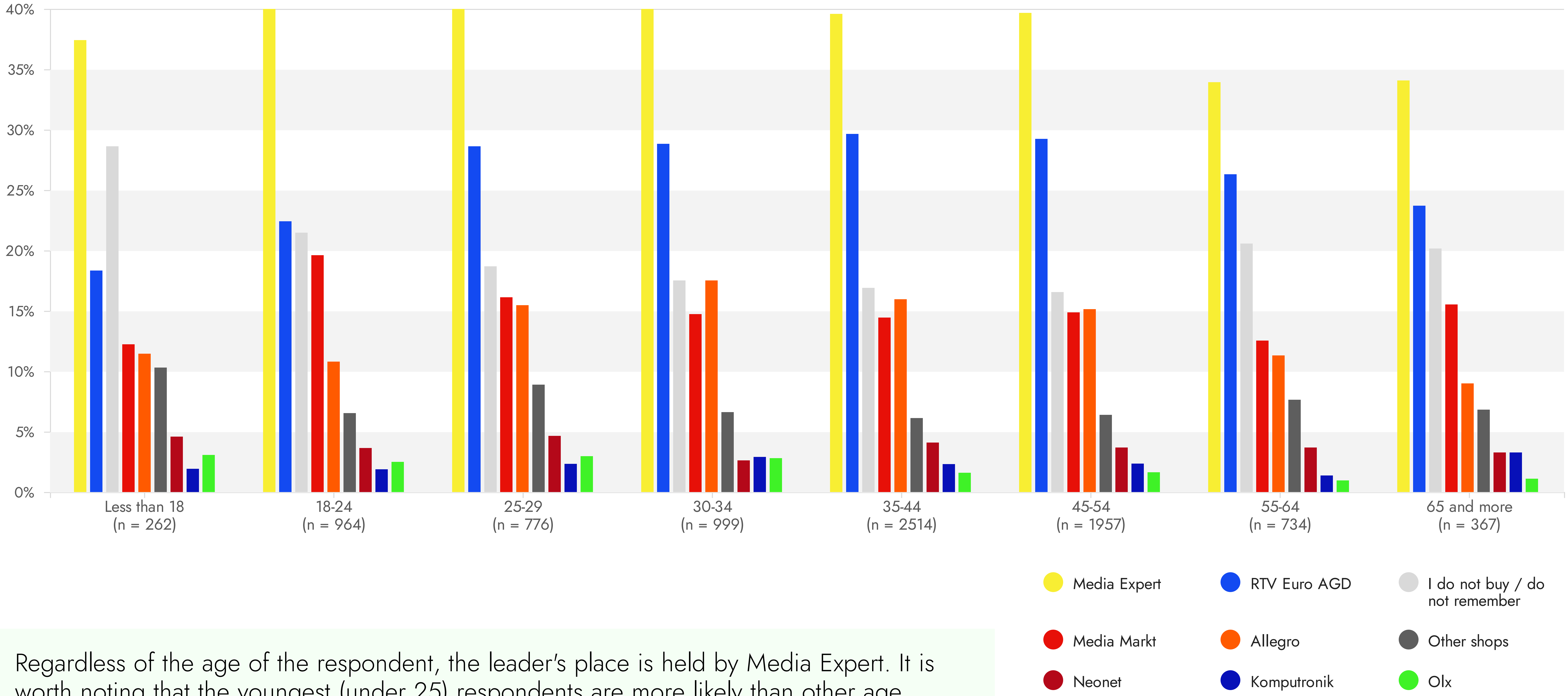
n 2022 = 9526, n 2023 = 8169

	Media Expert	RTV Euro AGD	I do not buy / do not remember	Media Markt	Allegro	Other shops	Komputronik	Neonet	Olx	Morele.net	Avans	Result count
województwo mazowieckie	33.7% +1.6pp	32.6% -2pp	19.4% -1.1pp	17% +0.9pp	15.6% +1.2pp	6.5% -1.9pp	2.6% +0.4pp	2.3% -1.3pp	2.3% -0.2pp	2.2% -0.1pp	0.6% -0.5pp	1405
województwo śląskie	39.2% +4.7pp	29.8% -2.9pp	18.5% -0.8pp	15.4% -1.4pp	12.9% -2pp	6.9% -1.2pp	2.8% +0.2pp	4.7% +0.3pp	2.1% -0.1pp	1.4% -0.4pp	1.1%	944
województwo wielkopolskie	42.2% +4.9pp	26.4% -4.6pp	19% +2.9pp	13% -2.7pp	14.8% -2.5pp	5.8% -1.8pp	2.9% +0.3pp	3.6% -1.3pp	1.1% -1.5pp	1.8% +0.3pp	0.6% -0.2pp	799
województwo dolnośląskie	46.7% +6.2pp	23.4% -4.9pp	15.9% -1.4pp	13.7% +0.9pp	14.8% -3.2pp	6.5% -2.9pp	1.8% -0.7pp	5.2% +0.7pp	2.2% -1.5pp	1.8% -0.8pp	0.4% -0.7pp	735
województwo małopolskie	40% +5.7pp	25.8% -4.9pp	18% -0.6pp	16.3% -3.7pp	19% +2pp	7.2% -1.9pp	3% +0.4pp	3.2% +0.2pp	1.8% -0.6pp	3.3% -1.2pp	0.6% -0.7pp	627
województwo pomorskie	41.7% +8.1pp	27.9% -5.4pp	18.2% +1.5pp	17.7% -1.2pp	12.6% -3.8pp	6.4% -0.7pp	2% -0.3pp	3.5% -2.6pp	1.5% -2.3pp	1% -0.4pp	0.7% -0.2pp	605
województwo łódzkie	43.4% +8.6pp	31.6% +2.4pp	14.1% -5.8pp	13.1% -4.3pp	15.4% -1.6pp	9.4% +2.2pp	1.4% -0.9pp	3.1% -2.9pp	3.3% +1.4pp	0.8% -1pp	0.6% -0.6pp	488
województwo kujawsko-pomorskie	44.6% +8.4pp	30.7% -1.6pp	14.4% -5pp	13.2% +1pp	13.7% -1.4pp	4.9% -1pp	1% -0.5pp	3.2% -0.3pp	0.7% -0.8pp	1% -0.5pp	0.7% +0.3pp	410
województwo zachodniopomorskie	42.2% +4.2pp	22.2% -1.5pp	19.8% +0.5pp	16.8% -3.2pp	14.1% -0.4pp	7.4% +1.5pp	3% +1.2pp	4.9% -2.1pp	1.7% -1.4pp	1% -1.2pp	1% +0.3pp	405
województwo lubelskie	38.1% -0.3pp	28.4% +1.6pp	18.2% -5.4pp	13.4% +0.6pp	14.5% -0.8pp	8.8% +0.2pp	1.4% -1.3pp	3.7% -1.5pp	1.1% -1.9pp	1.1% -0.6pp	0.3% -0.7pp	352

WHERE HAVE YOU RECENTLY PURCHASED ELECTRONIC CONSUMER ELECTRONICS OR HOUSEHOLD APPLIANCES?

Analysis by age

n = 8573

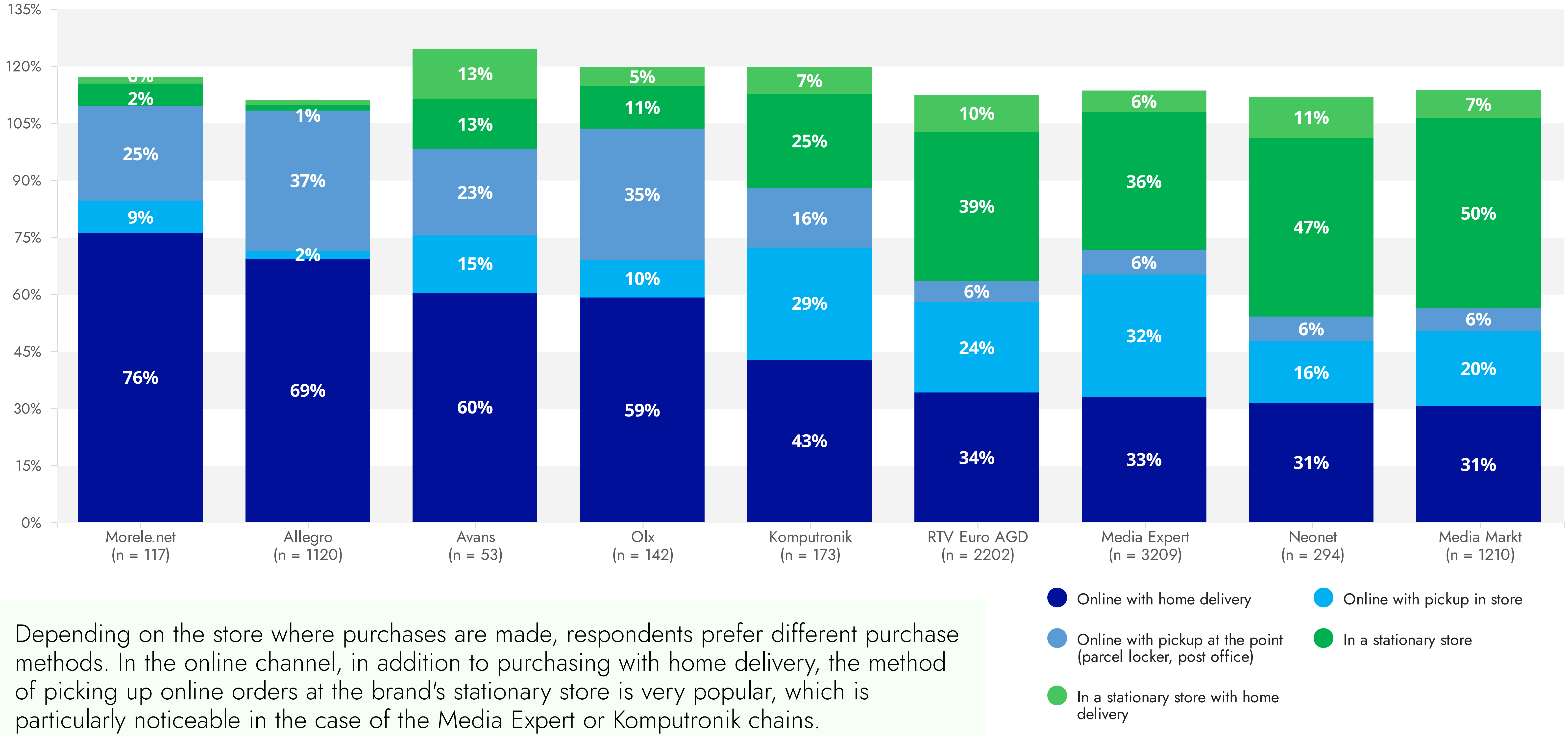


Regardless of the age of the respondent, the leader's place is held by Media Expert. It is worth noting that the youngest (under 25) respondents are more likely than other age groups not to buy electronic products or household appliances.

HOW DID YOU BUY PRODUCTS THERE?

Purchasing channel of choice - multiple choice question

n = 6258



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

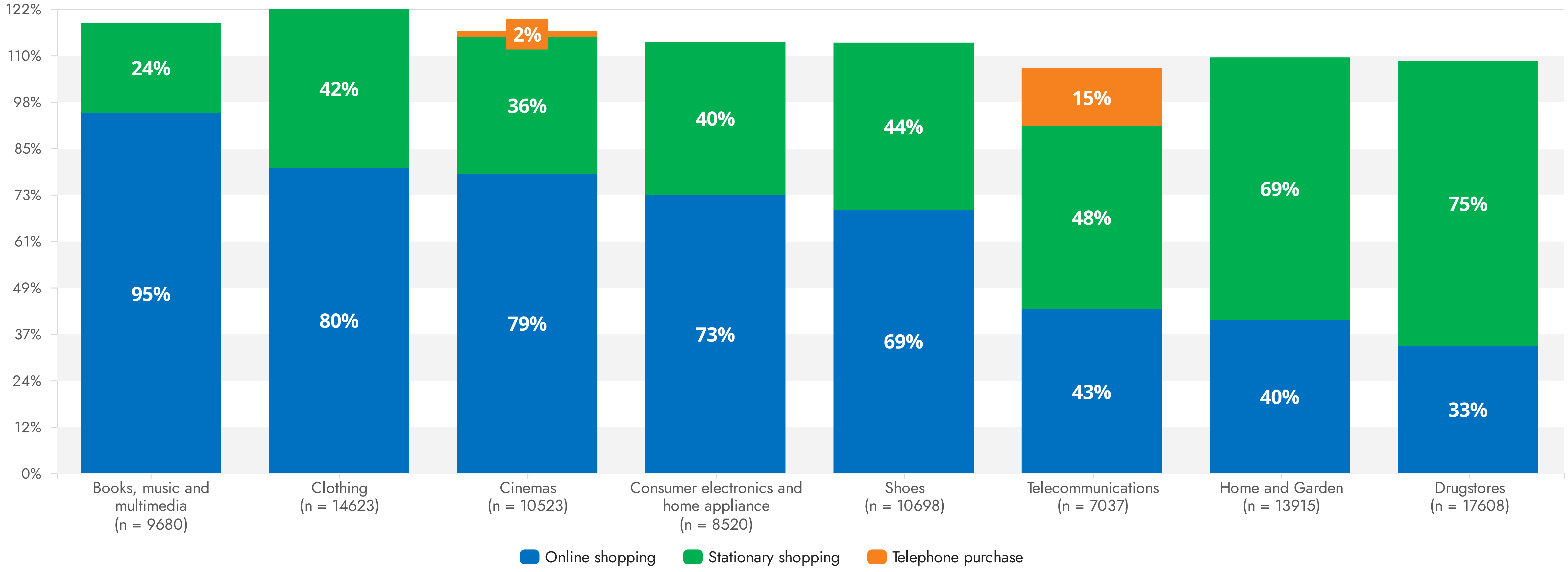
HOW DID YOU BUY PRODUCTS THERE?

Purchasing channel of choice - Omnichannel 2023 with changes from 2022

	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
Media Expert	29.6% +2.8pp	28.3% +3pp	4.7%	32.6% -5.3pp	4.9% -1.2pp	3213
RTV Euro AGD	31.1% +1.2pp	20.7% +0.7pp	3.7%	36.1% -2.7pp	8.5% +0.7pp	2204
Media Markt	27.1% +2.6pp	16.7% +0.6pp	4%	46% -3.2pp	6.3% -0.6pp	1216
Allegro	65.7% +2.4pp	1.2%	31.8%	0.6% -0.8pp	0.7% -0.4pp	1121
Neonet	28.6% +1.2pp	13.6%	4.8%	44.2% -1.4pp	8.8% +0.4pp	294
Komputronik	38.2% -3.8pp	25.4% +1.7pp	11%	20.2% -3.5pp	5.2% +1.1pp	173
Morele.net	67.8% +0.3pp	6.8% -0.5pp	22%	3.4% -2.4pp		118
Avans	54.7% +5.3pp	11.3% +1.4pp	15.1%	9.4% -12.8pp	9.4% +0.8pp	53

CROSS-SECTION BETWEEN INDUSTRIES - HOW DID YOU BUY 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

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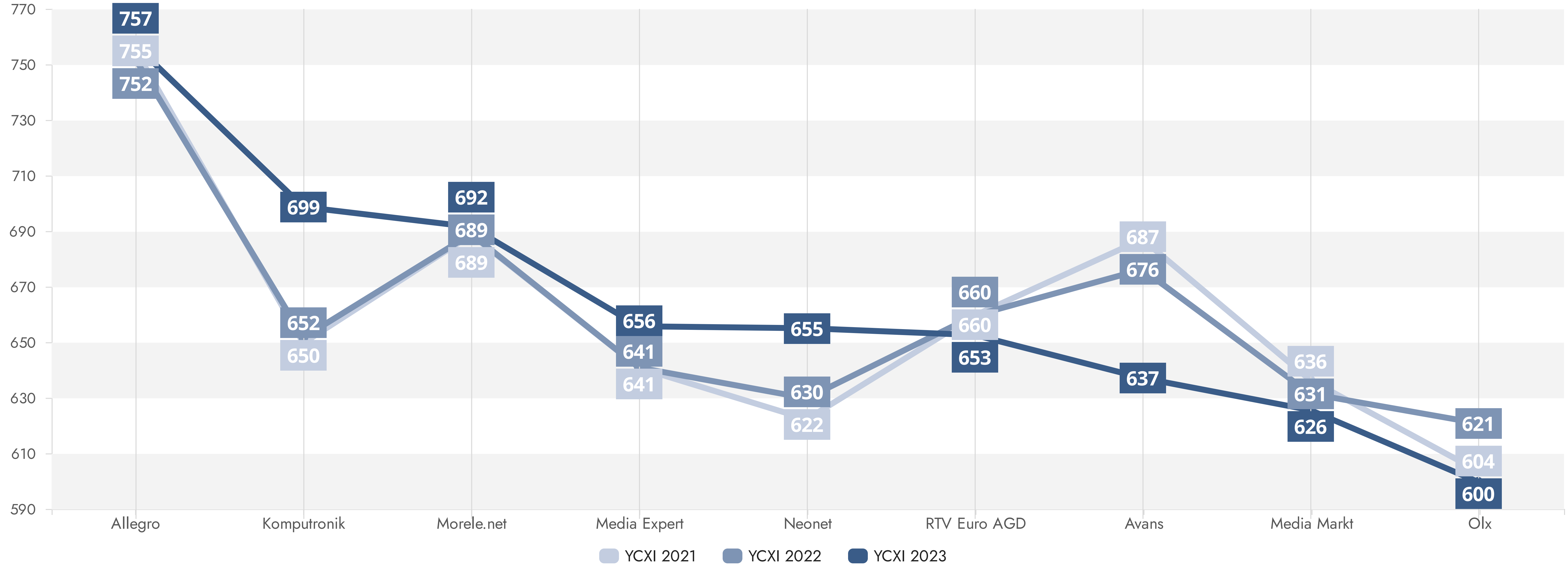
YOUR CUSTOMER EXPERIENCE INDEX

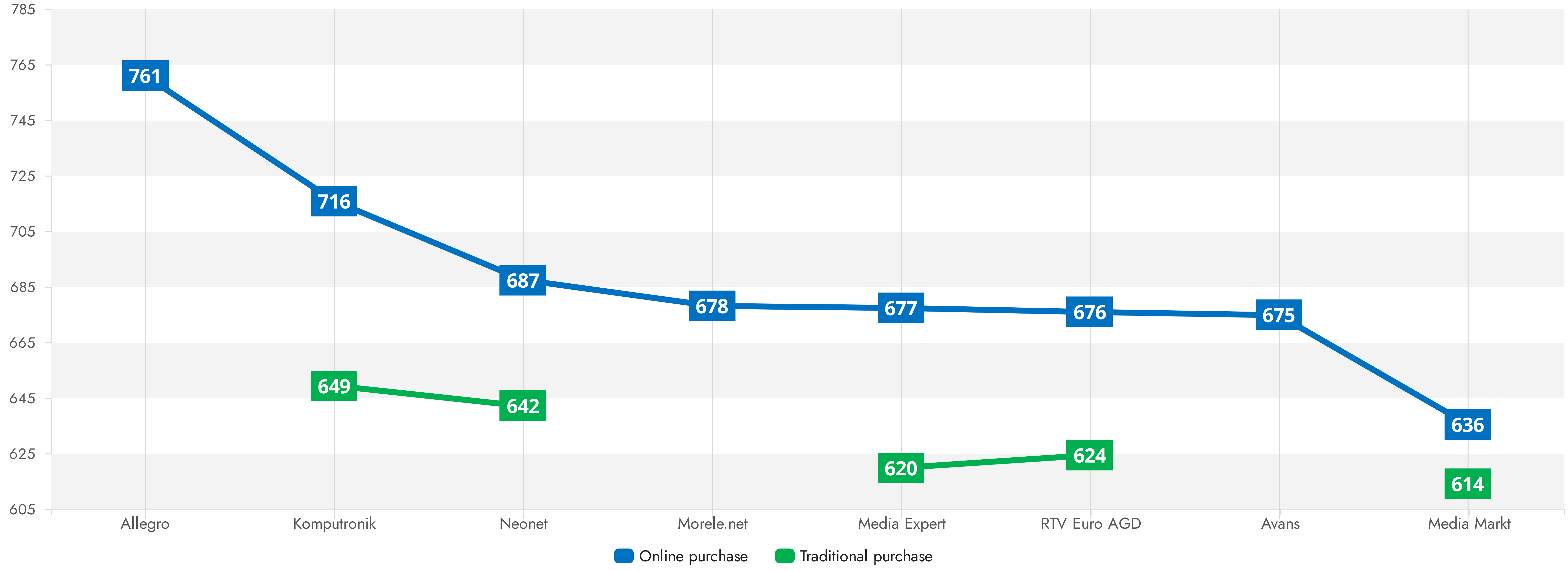
Quality index on a scale of 0 to 1000 taking into account four satisfaction factors:
availability and selection of products, ease of ordering, satisfaction with purchase, willingness to recommend the store to friends



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 only one company scored in the neighborhood of three-quarters of the possible points. The industry leaders are Allegro and, for the first time, Komputronik, whose scores rose the most among the companies analyzed.

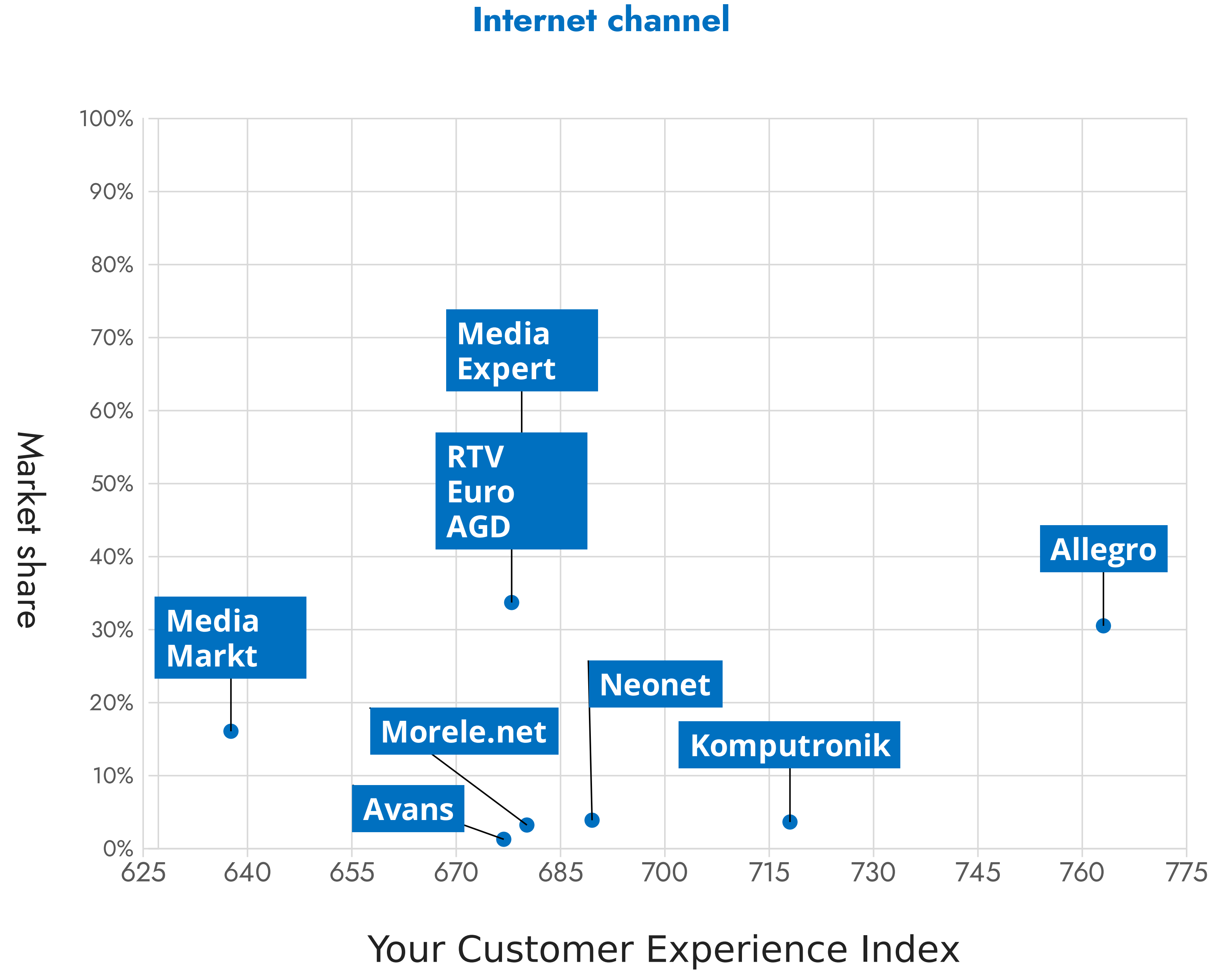
YOUR CUSTOMER EXPERIENCE INDEX

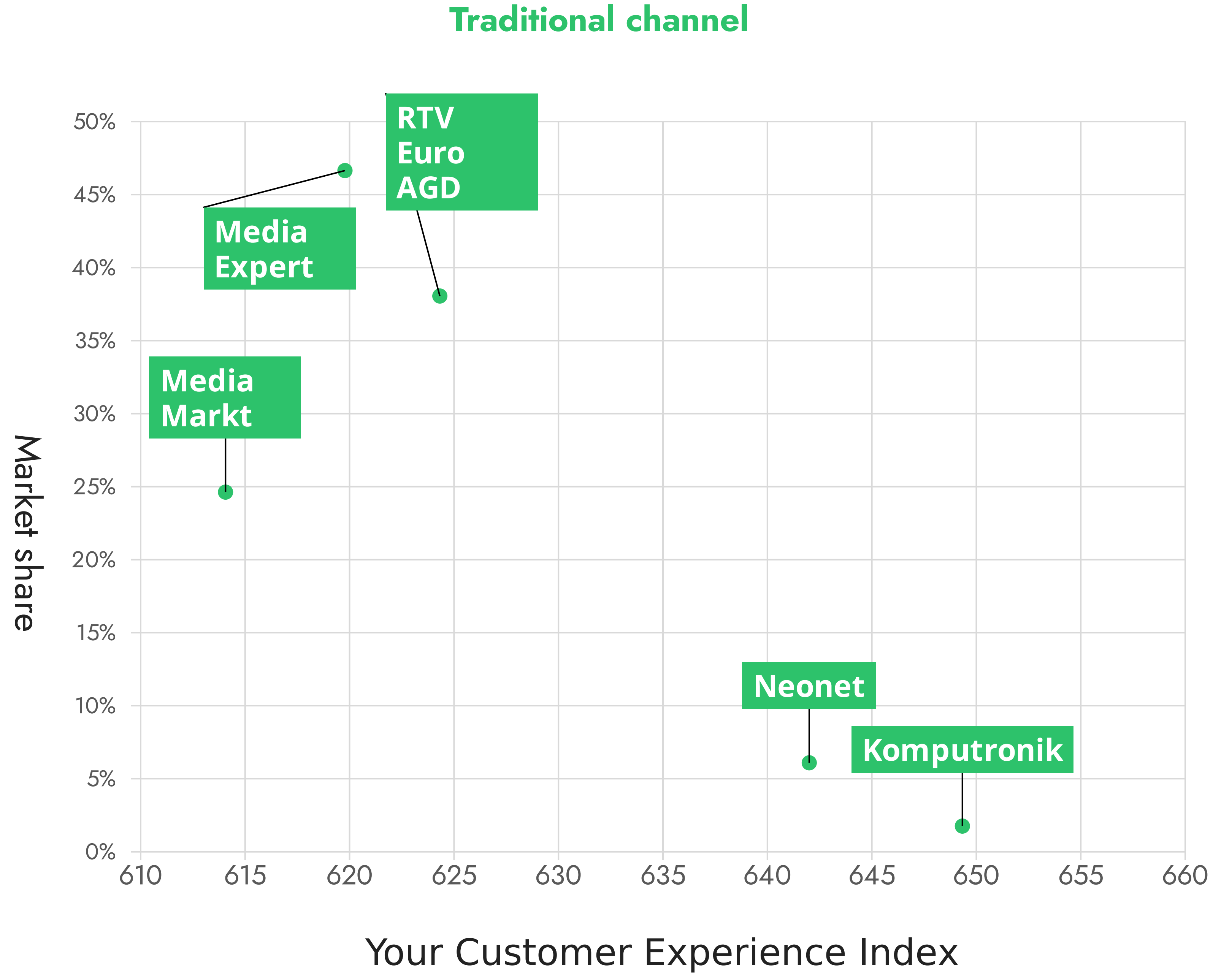
Quality index on a scale of 0 to 1000, broken down by purchasing channel



It is noteworthy that respondents are more positive about the online shopping experience than those from traditional sales. Komputronik boasts the highest quality indicator in the traditional sales channel. Allegro dominates the online channel, followed closely by Komputronik and Neonet.

YOUR CUSTOMER EXPERIENCE INDEX

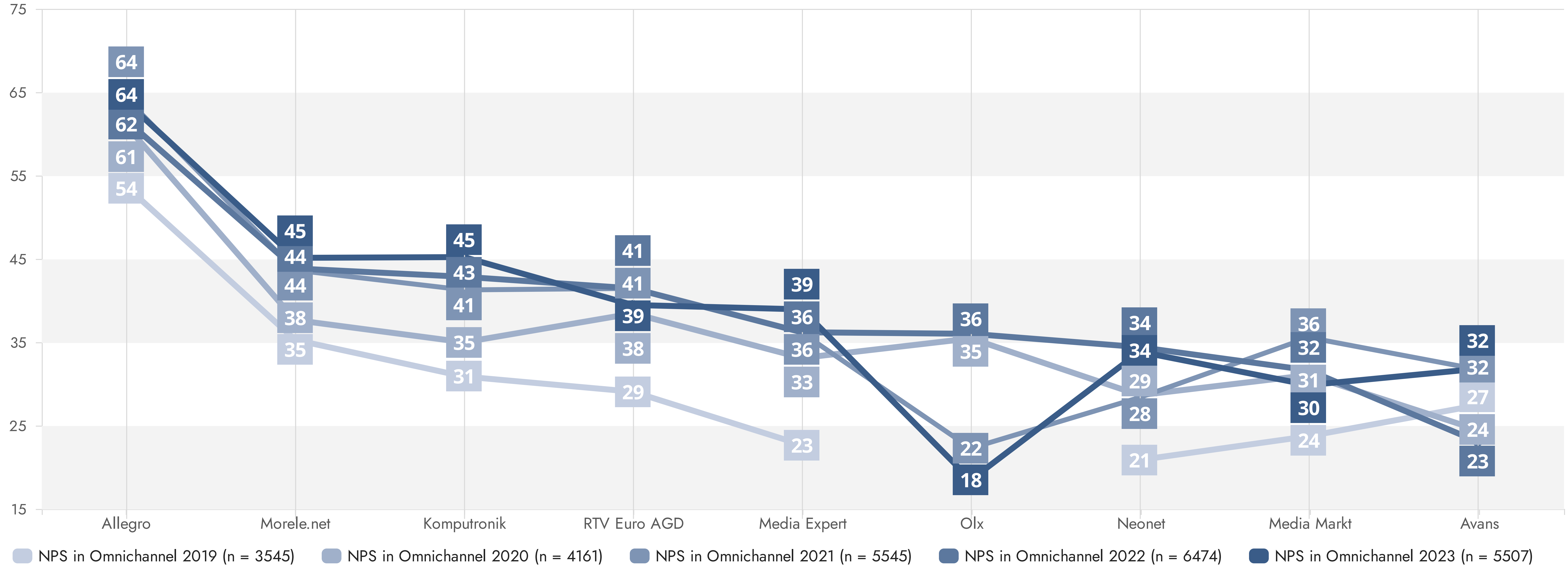




The charts show market shares by sales channel and Your Customer Experience Index value. In the online channel, Allegro dominates with the highest value of the quality index, while Media Expert has the largest market share. In the stationary channel, Media Expert also has the largest share, while Komputronik holds the leading position in this area of experience.

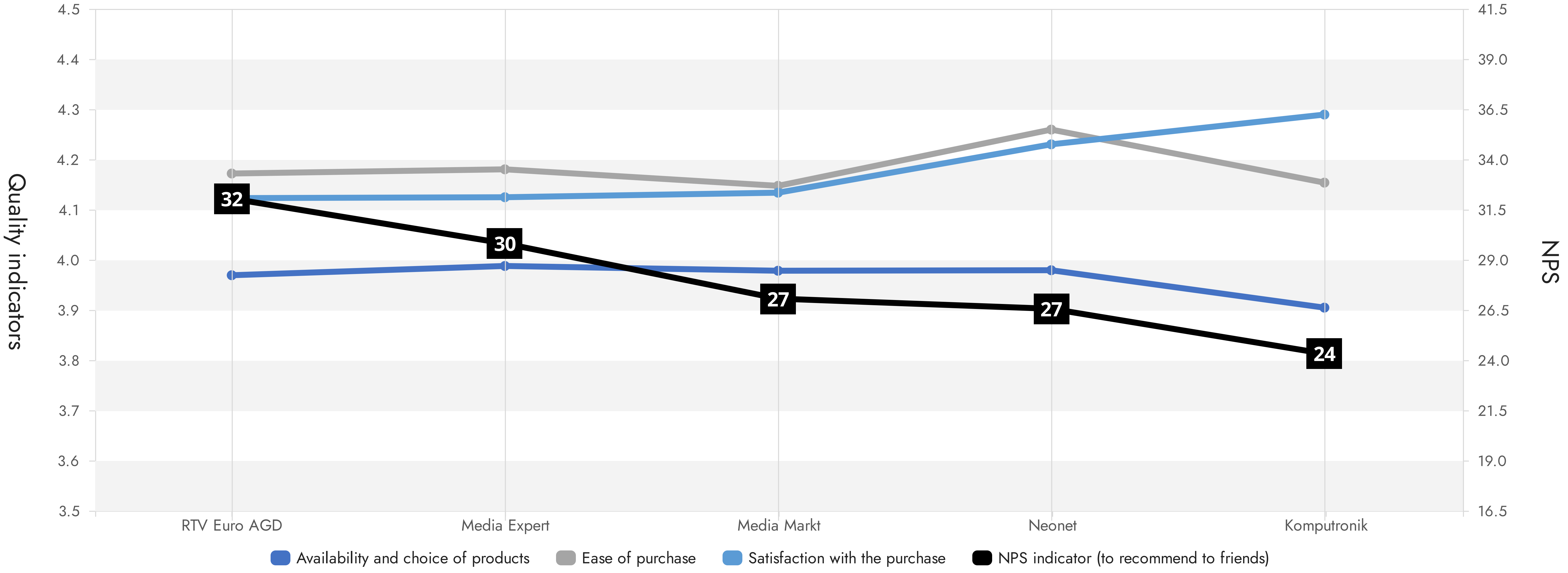
HOW LIKELY ARE YOU TO RECOMMEND THESE STORES TO YOUR FRIENDS?

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



TRADITIONAL CHANNEL - EXPERIENCE QUALITY RATINGS

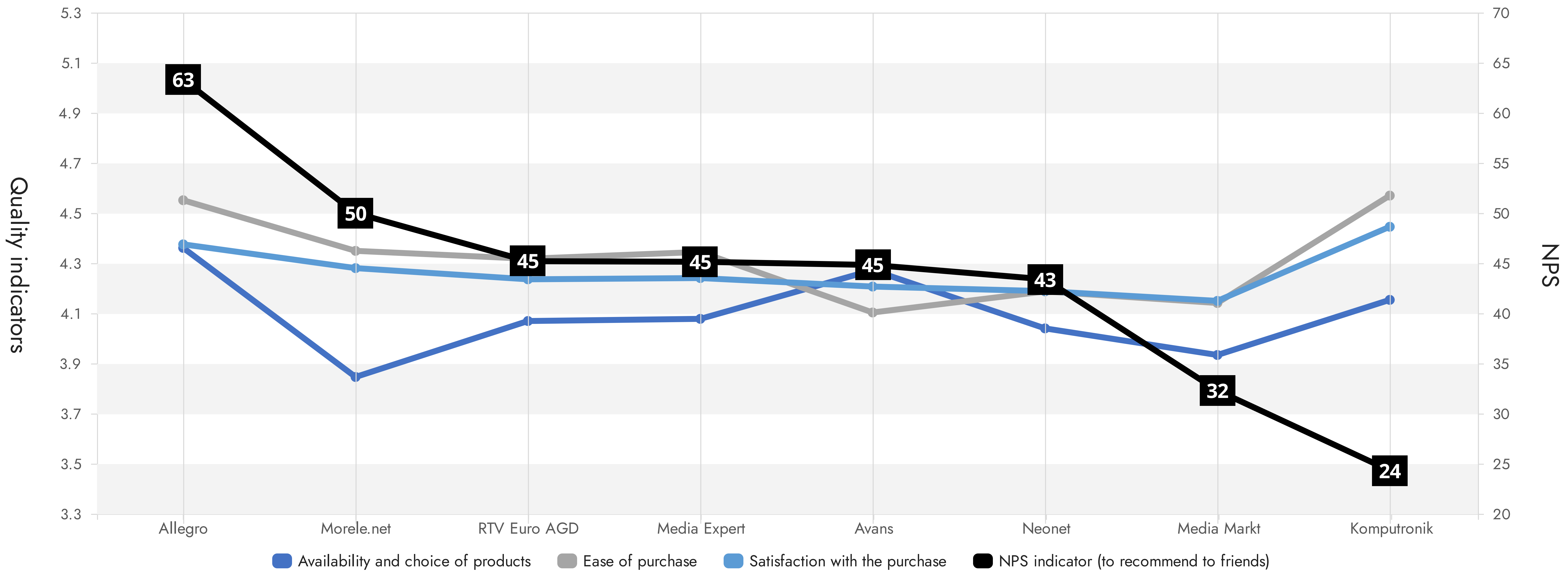
Quality ratings on a scale of 1 to 5 and NPS index on a scale of -100 to 100



The highest NPS in the traditional channel is recorded for RTV Euro AGD, with Komputronik performing slightly worse. Survey respondents gave similar ratings to Media Markt, Neonet and Komputronik.

ONLINE CHANNEL - EXPERIENCE QUALITY RATINGS

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



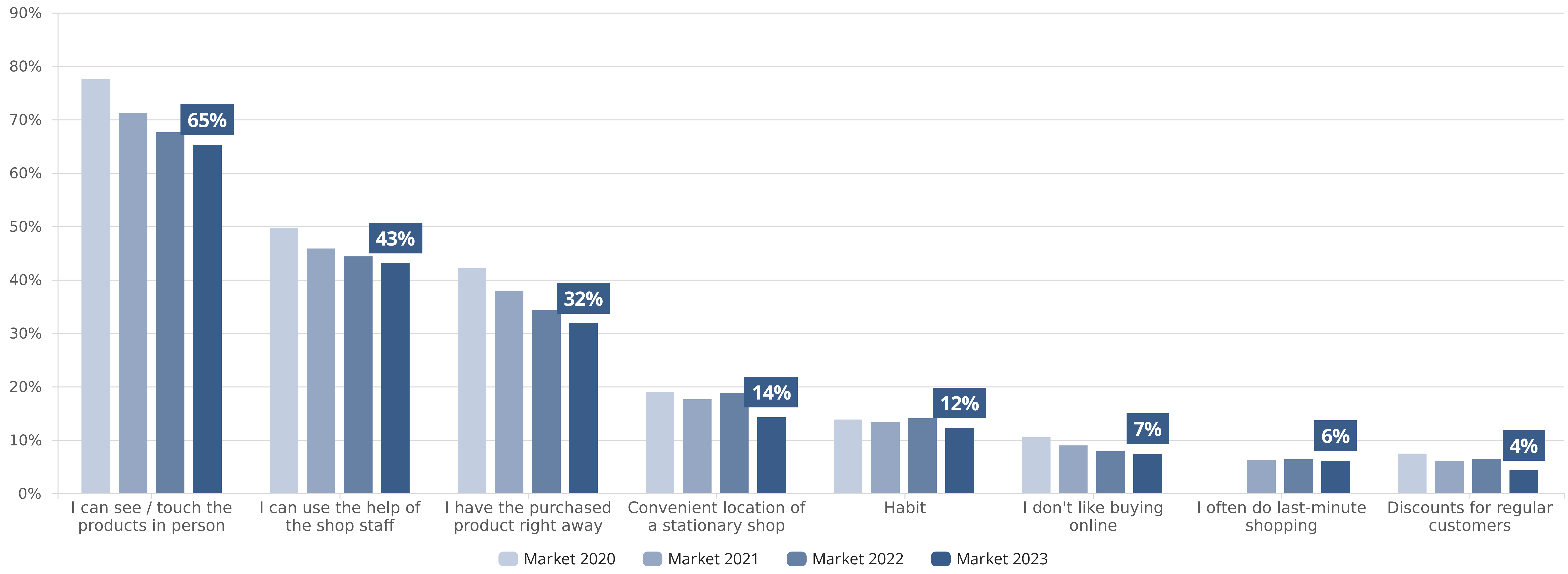
Analyzing individual aspects of the experience against the NPS indicator, we observe the strength of the Allegro brand, where a high score for ease of purchase is correlated with a high likelihood of recommending the brand to friends. In terms of ease of purchase, Komputronik also scored very high.

SHOPPING PREFERENCES IN THE STATIONARY CHANNEL

WHY DO YOU PREFER SHOPPING FOR ELECTRONIC CONSUMER ELECTRONICS OR HOME APPLIANCES IN A STATIONARY STORE?

Traditional channel - Multiple choice question

n 2020 = 1781, 2021 = 2723, 2022 = 2999, 2023 = 2179



WHY DO YOU PREFER SHOPPING FOR ELECTRONIC CONSUMER ELECTRONICS OR HOME APPLIANCES IN A STATIONARY STORE?

Traditional channel - Multiple choice question. Co-occurrence of factors

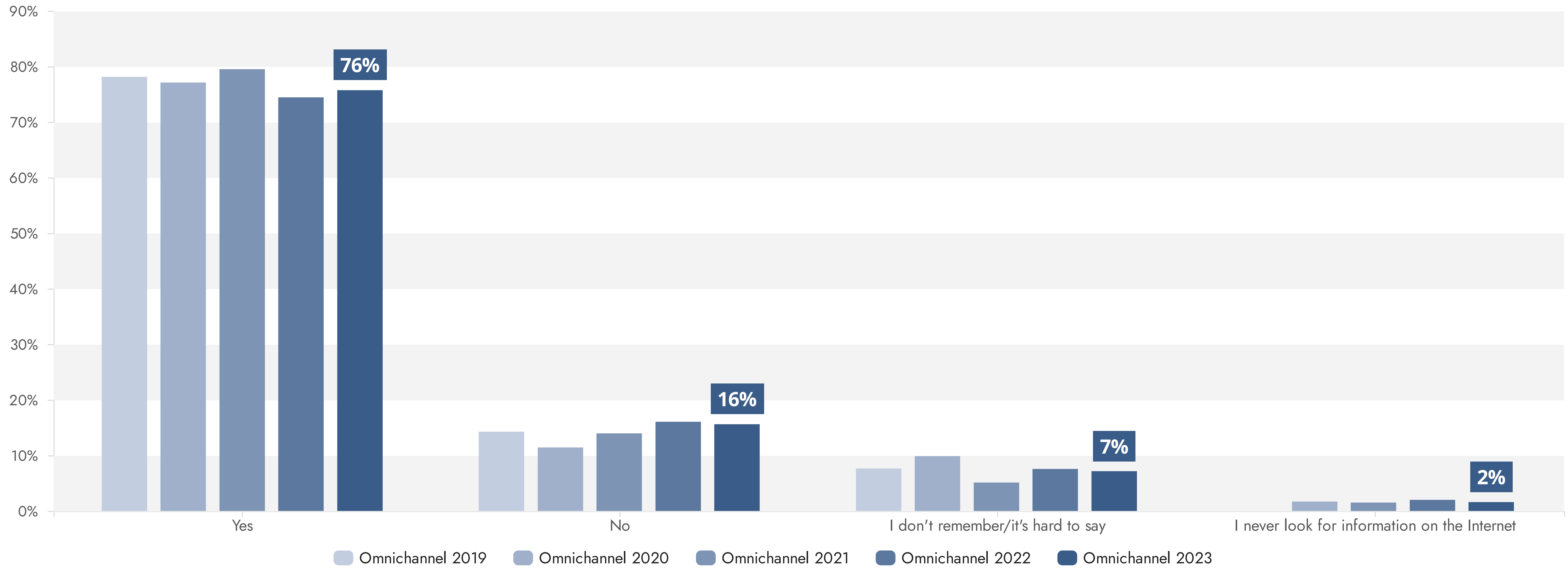
n = 2179

	I can see / touch the products in person	I can use the help of the shop staff	Discounts for regular customers	I have the purchased product right away	Convenient location of a stationary shop	Habit	I don't like buying online	I often do last-minute shopping	Result count
I can see / touch the products in person		45.5%	3.7%	34.8%	15.1%	8.3%	4.6%	5.2%	1421
I can use the help of the shop staff	68.9%		5.5%	39.8%	19%	10.1%	6.1%	5.9%	939
Discounts for regular customers	56.4%	55.3%		41.5%	26.6%	11.7%	10.6%	9.6%	94
I have the purchased product right away	71.2%	53.9%	5.6%		22%	12.4%	7.5%	8.9%	694
Convenient location of a stationary shop	69.4%	57.4%	8.1%	49.4%		14.8%	8.4%	9%	310
Habit	44.5%	35.8%	4.2%	32.5%	17.4%		6%	10.2%	265
I don't like buying online	40.4%	35.4%	6.2%	32.3%	16.1%	9.9%		3.7%	161
I often do last-minute shopping	56.5%	42%	6.9%	47.3%	21.4%	20.6%	4.6%		131

DID YOU LOOK FOR INFORMATION ON THE INTERNET BEFORE YOUR LAST PURCHASE OF ELECTRONIC CONSUMER ELECTRONICS OR HOME APPLIANCES FROM A STATIONARY STORE?

Traditional channel - Multiple choice question

n 2019 = 1847, 2020 = 1440, 2021 = 1751, 2022 = 2069, 2023 = 1321

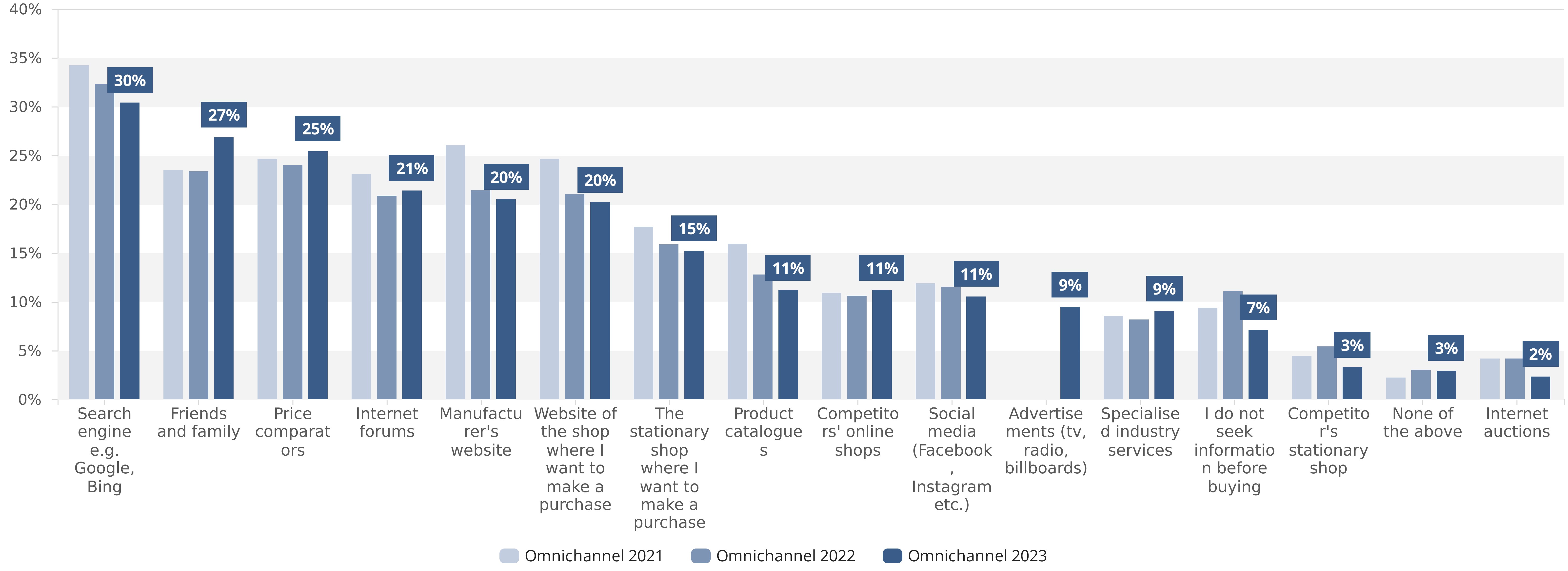


From year to year, survey behavior changes little.

WHERE DO YOU GET INFORMATION ABOUT ELECTRONIC CONSUMER ELECTRONICS OR HOUSEHOLD APPLIANCES BEFORE BUYING THEM?

Traditional channel - Multiple choice question

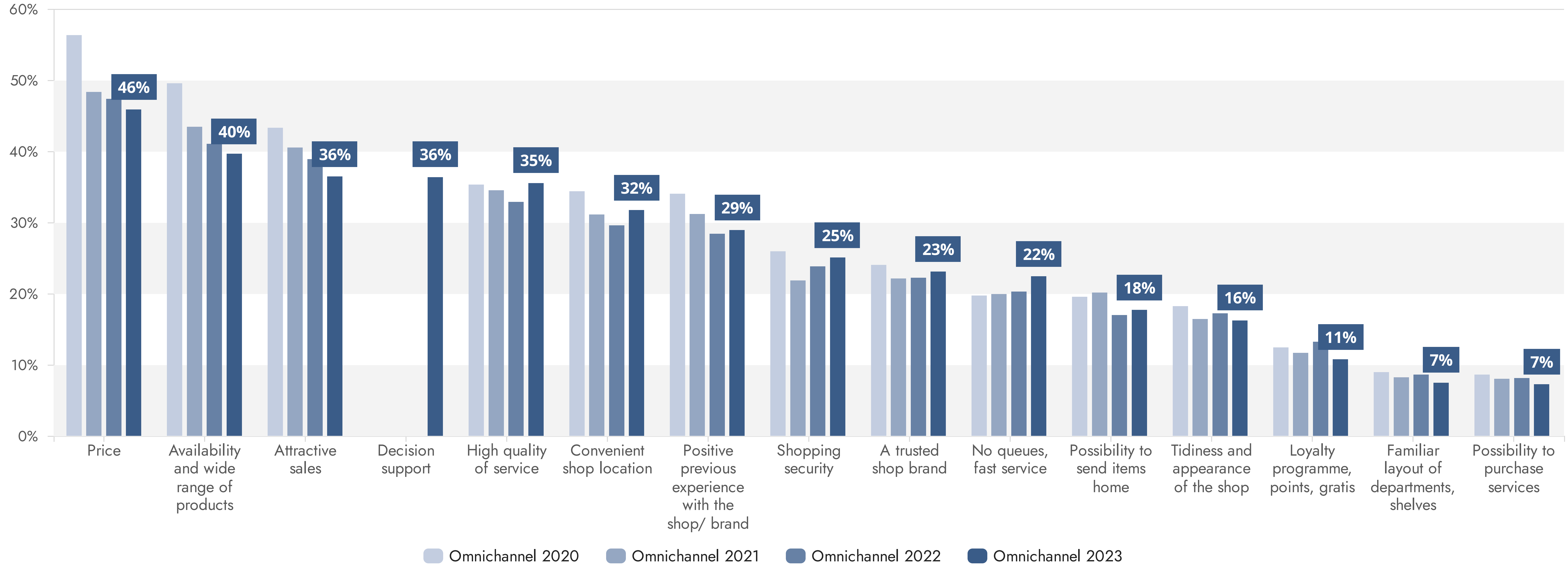
n 2022 = 1751, 2023 =



WHAT IS THE MOST IMPORTANT THING TO YOU WHEN SHOPPING FOR ELECTRONIC CONSUMER ELECTRONICS OR HOME APPLIANCES IN A STATIONARY

Traditional channel - Multiple choice question

n 2020 = 1153, 2021 = 1476, 2022 = 1667, 2023 = 1062

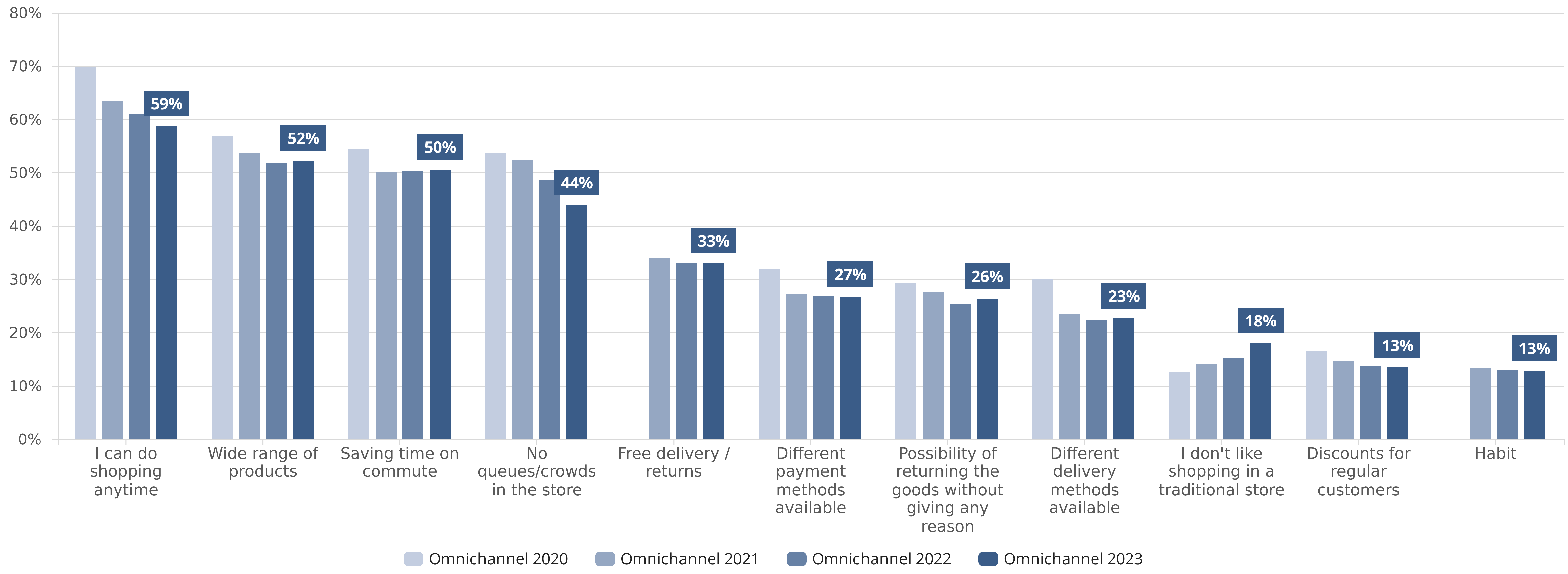


SHOPPING PREFERENCES IN THE ONLINE CHANNEL

WHY DO YOU PREFER TO BUY ELECTRONIC CONSUMER ELECTRONICS OR HOME APPLIANCES FROM AN ONLINE STORE?

Internet channel - Multiple choice question

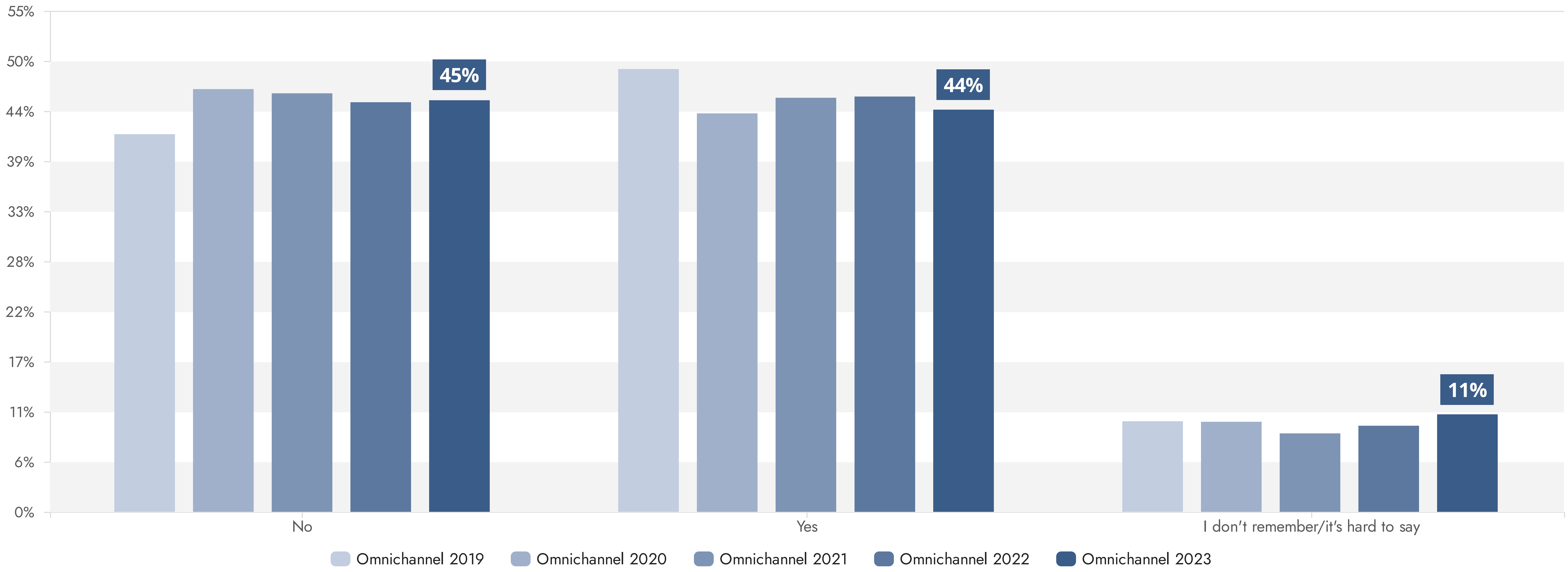
n 2021 = 2168, 2022 = 2633, 2023 = 2006



BEFORE THE LAST TIME YOU BOUGHT AN ELECTRONIC CONSUMER ELECTRONICS OR HOME APPLIANCE ONLINE, DID YOU VISIT STATIONARY STORES TO FAMILIARIZE YOURSELF WITH THE PRODUCT?

Internet channel - Multiple choice question

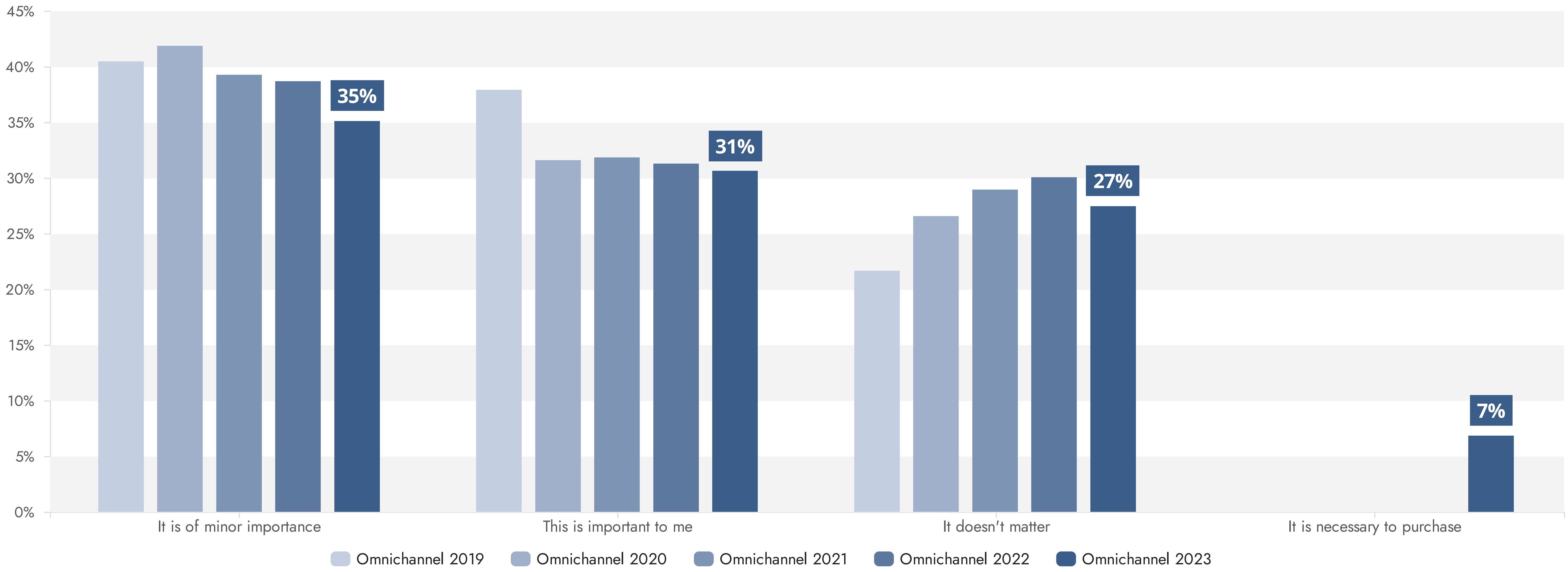
n 2019 = 1570, 2020 = 1914, 2021 = 2682, 2022 = 3073, 2023 = 2451



DO YOU CONSIDER THE PRESENCE OF A BRAND'S STATIONARY STORE IN YOUR AREA WHEN PLANNING ONLINE PURCHASES OF CONSUMER ELECTRONICS OR APPLIANCES?

Internet channel - Multiple choice question

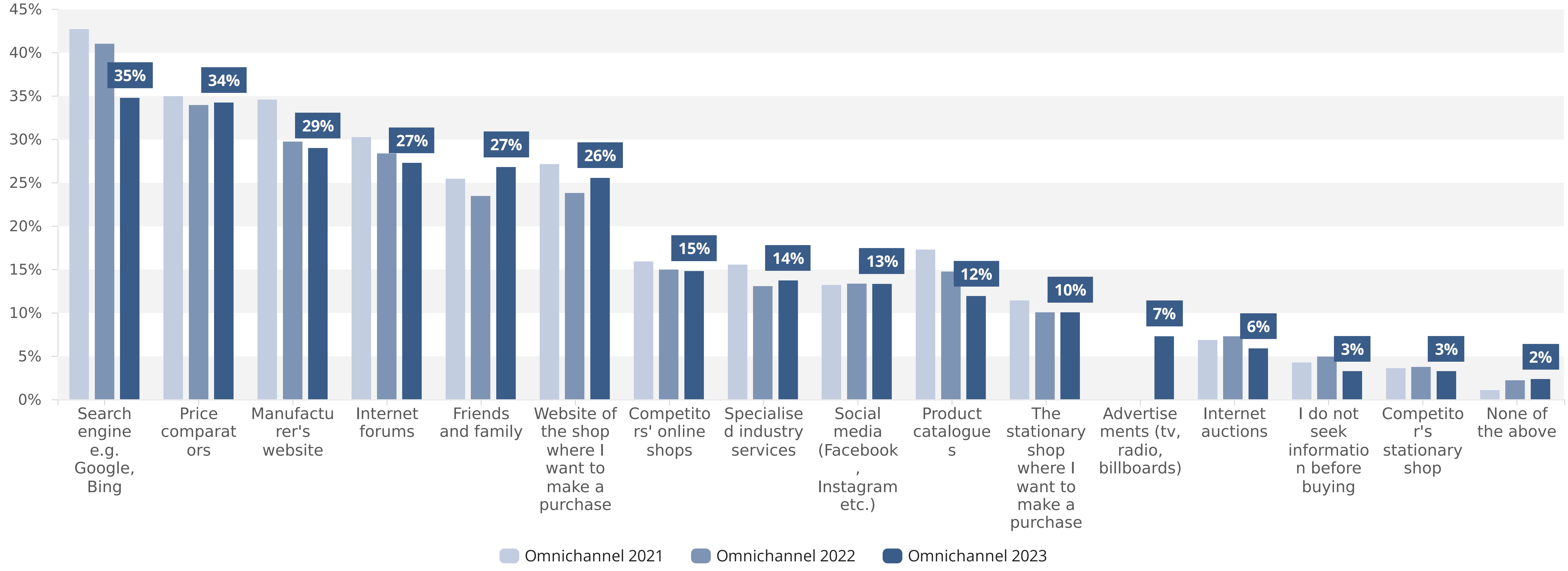
n 2019 = 1515, 2020 = 1868, 2021 = 2617, 2022 = 2989, 2023 = 2371



WHERE DO YOU GET YOUR PRODUCT INFORMATION FROM BEFORE BUYING?

Internet channel - Multiple choice question

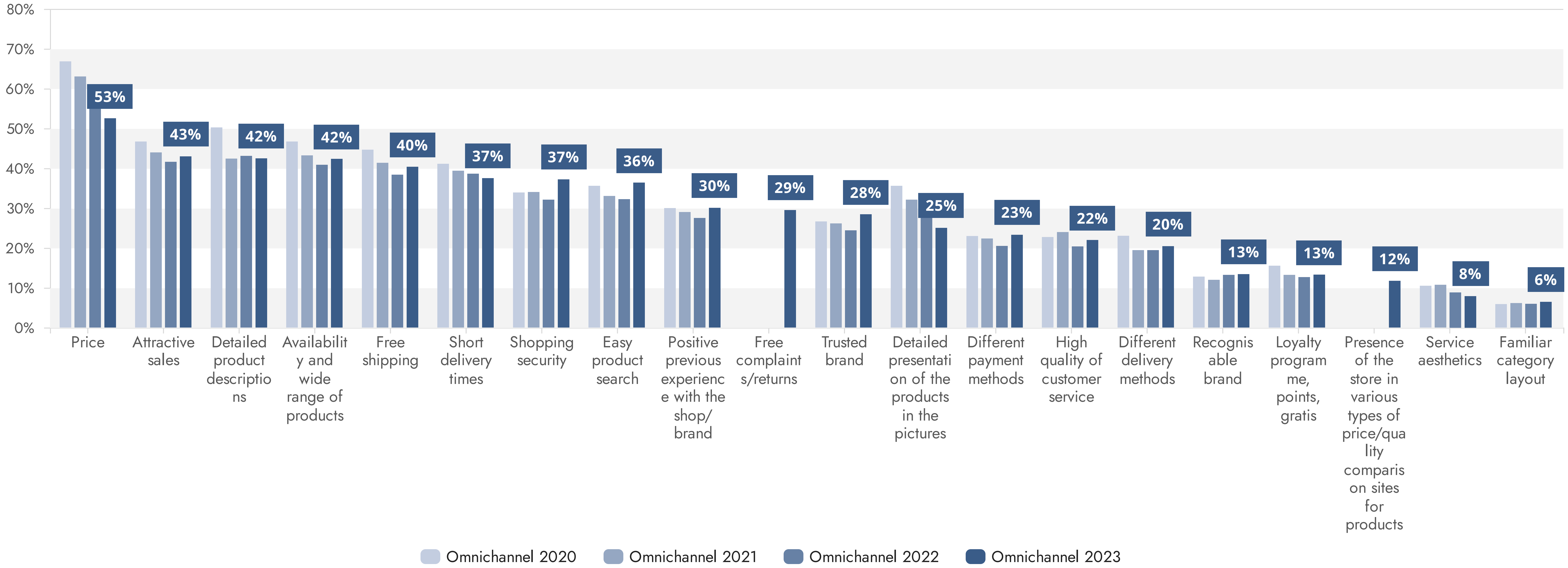
n 2021 = 2696, 2022 = 3092, 2023 = 2497



WHAT IS THE MOST IMPORTANT THING FOR YOU WHEN SHOPPING FOR ELECTRONIC CONSUMER ELECTRONICS OR HOME APPLIANCES IN AN ONLINE

Internet channel - Multiple choice question

n 2020 = 1518, 2021 = 2170, 2022 = 2449, 2023 = 1914



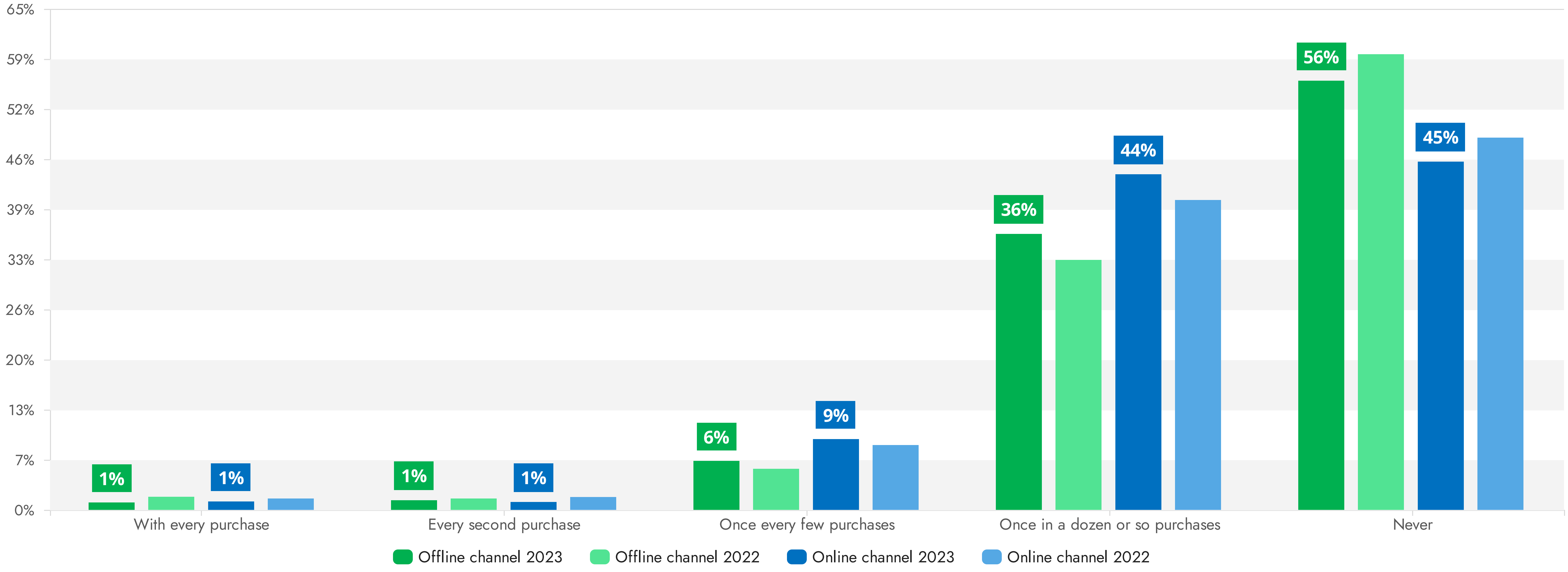
The price of a product ceases to matter so much to the customer every year, all the accompanying circumstances like detailed product descriptions or free complaints and returns are becoming more important.

POST-PURCHASE EXPERIENCE

HOW OFTEN DO YOU FIND YOURSELF RETURNING CONSUMER ELECTRONICS OR HOUSEHOLD APPLIANCES (COMPLAINT/RETURN/EXCHANGE)?

Single-choice question

n internet channel = 1753, n offline channel = 1042

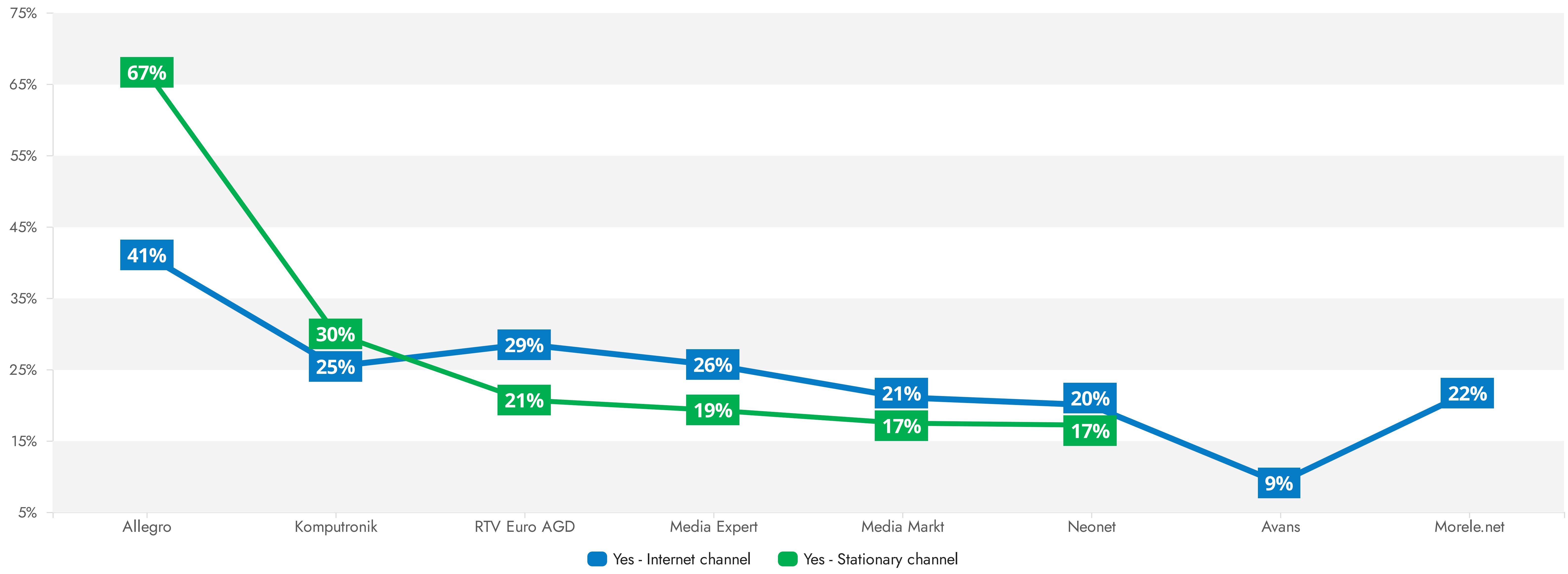


Nearly half of respondents never return or replace consumer electronics/appliances products in the online channel, while 56% in the stationary channel.

HAVE YOU HAD CONTACT WITH CUSTOMER SERVICE IN THE PAST YEAR? - SHARE HAVING CONTACT

Analysis of customers in contact with Customer Service Offices

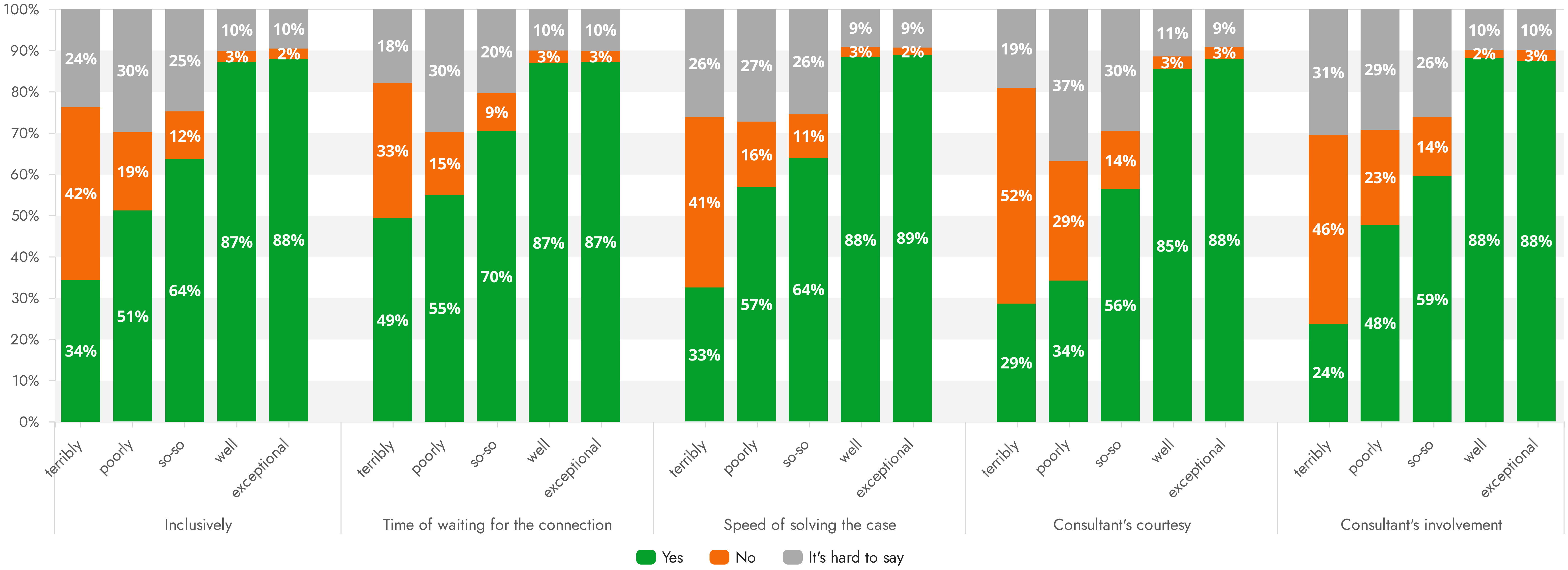
n online store = 1592, n traditional store = 1129



DO YOU STILL USE OR WILL YOU CONTINUE TO USE THE BRAND? - ACCORDING TO RATINGS OF INDIVIDUAL ASPECTS

Single-choice matrix question

n = 2341



		Yes	No	It's hard to say
Inclusively	terribly	34%	42%	24%
	poorly	51%	19%	30%
	so-so	64%	12%	25%
	well	87%	3%	10%
	exceptional	88%	2%	10%
Time of waiting for the connection	terribly	49%	33%	18%
	poorly	55%	15%	30%
	so-so	70%	9%	20%
	well	87%	3%	10%
	exceptional	87%	3%	10%
Speed of solving the case	terribly	33%	41%	26%
	poorly	57%	16%	27%
	so-so	64%	11%	26%
	well	88%	3%	9%
	exceptional	89%	2%	9%
Consultant's courtesy	terribly	29%	52%	19%
	poorly	34%	29%	37%
	so-so	56%	14%	30%
	well	85%	3%	11%
	exceptional	88%	3%	9%
Consultant's involvement	terribly	24%	46%	31%
	poorly	48%	23%	29%
	so-so	59%	14%	26%
	well	88%	2%	10%
	exceptional	88%	3%	10%

Negative ratings of consultant engagement have the strongest impact (fatal and poor ratings) on reluctance to use a brand's offerings again. The strongest influence in the case of a fatal rating is, in turn, courtesy, consultant engagement, case resolution time and call waiting time.

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 brands
- Use of mobile applications of particular brands
- The impact of reviews and ratings on purchasing decisions
- Frequencies of returns
- Preferred methods of contacting brands by mode of purchase
- Preferred payment methods
- Customer service ratings for each brand

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 to extract these most valuable gems.

SUMMARY OF THE STUDY

08-09 2023

Survey conducted in August and September 2023

250 thousan

More than 250,000 people completed the survey

10

We examined ten product segments


Cinemas


Clothes

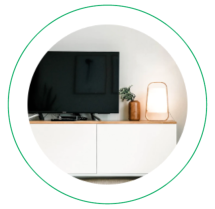

Drugstores


Footwear


Pharmacies


Telecommunicati


Home and garden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