YourCX

REPORT

OMNI CHANNEL 2023

DRUGSTORES

REPORT

OMNI CHANNEL 2023

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

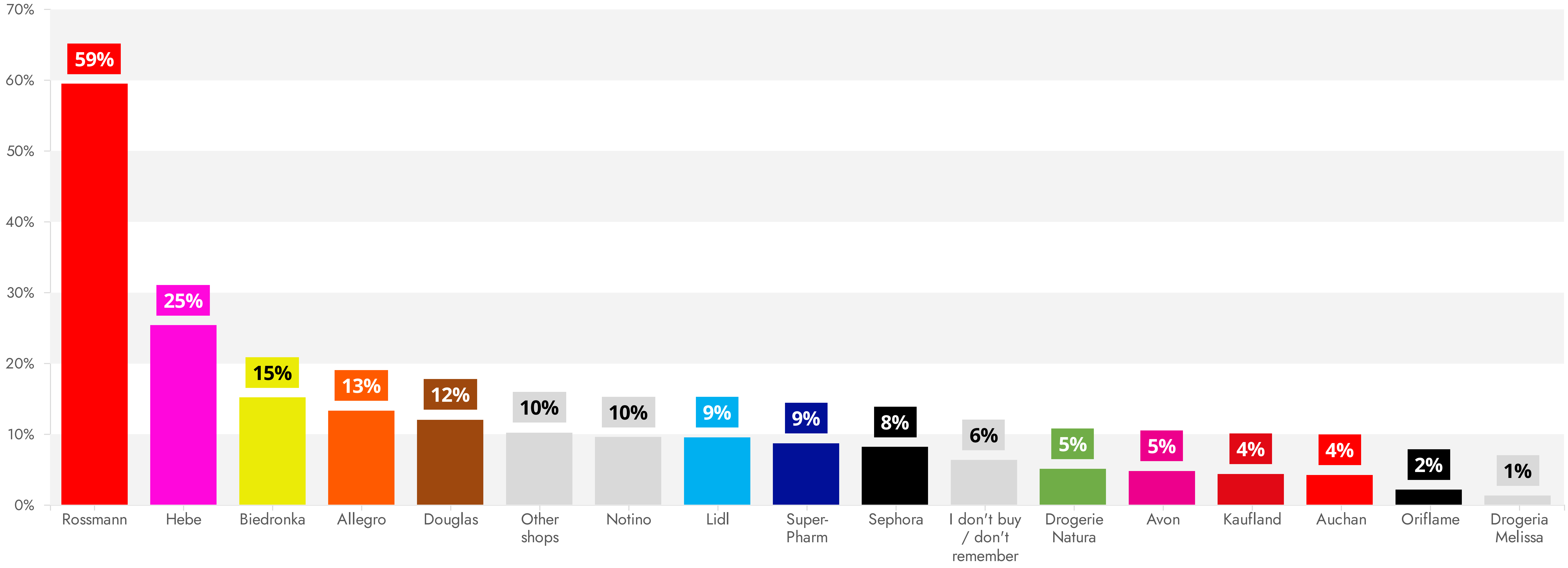
EXAMPLES OF CALCULATIONS FOR COMPANY XYZ

	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 COSMETICS, PERFUME OR HYGIENE PRODUCTS?

Multiple choice question

n = 10898

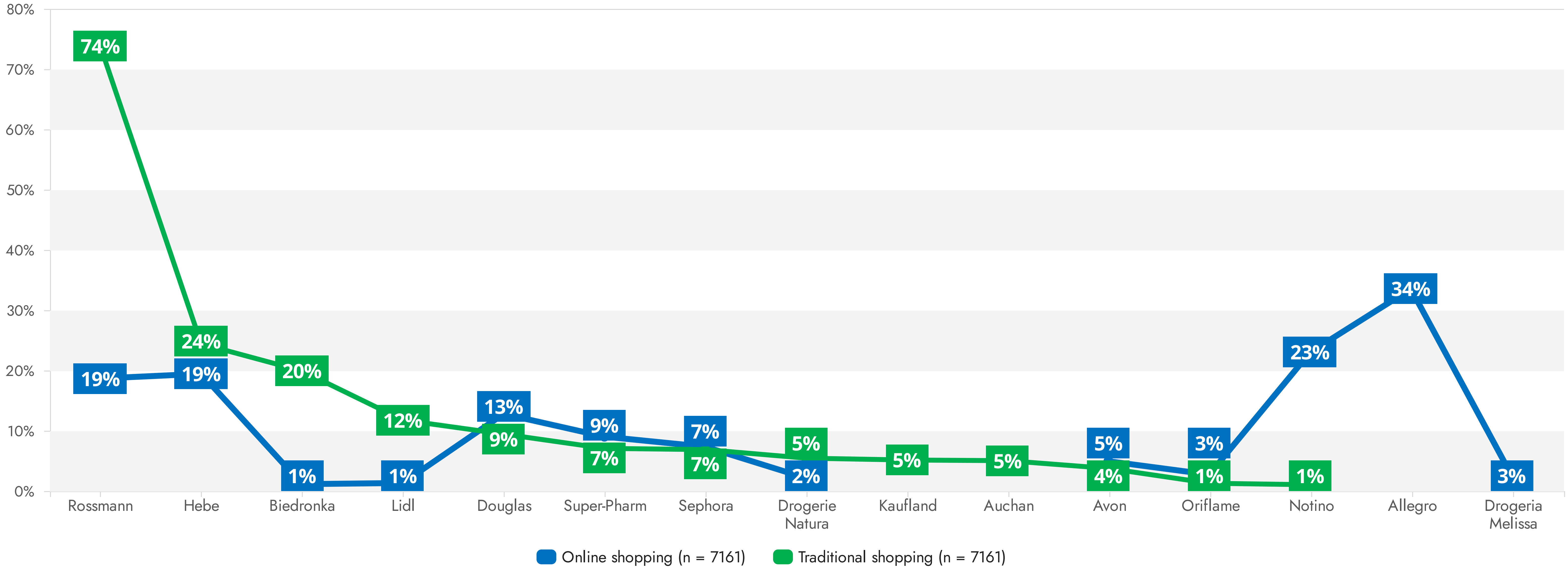


Rossmann has the largest stationary sales network, which is probably also why it is the undisputed market leader. As many as 59% of respondents have recently shopped there. In second place is Hebe, which was indicated by one in four respondents, and in third place is Ladybug - 15%. Only 6% of respondents have not recently bought products from this category. The results are aggregated for all shopping channels (online and traditional shopping combined).

WHERE HAVE YOU RECENTLY PURCHASED COSMETICS, PERFUME OR HYGIENE PRODUCTS?

Market shares by purchase channel

n = 3577 online purchase, 7161 stationary purchase

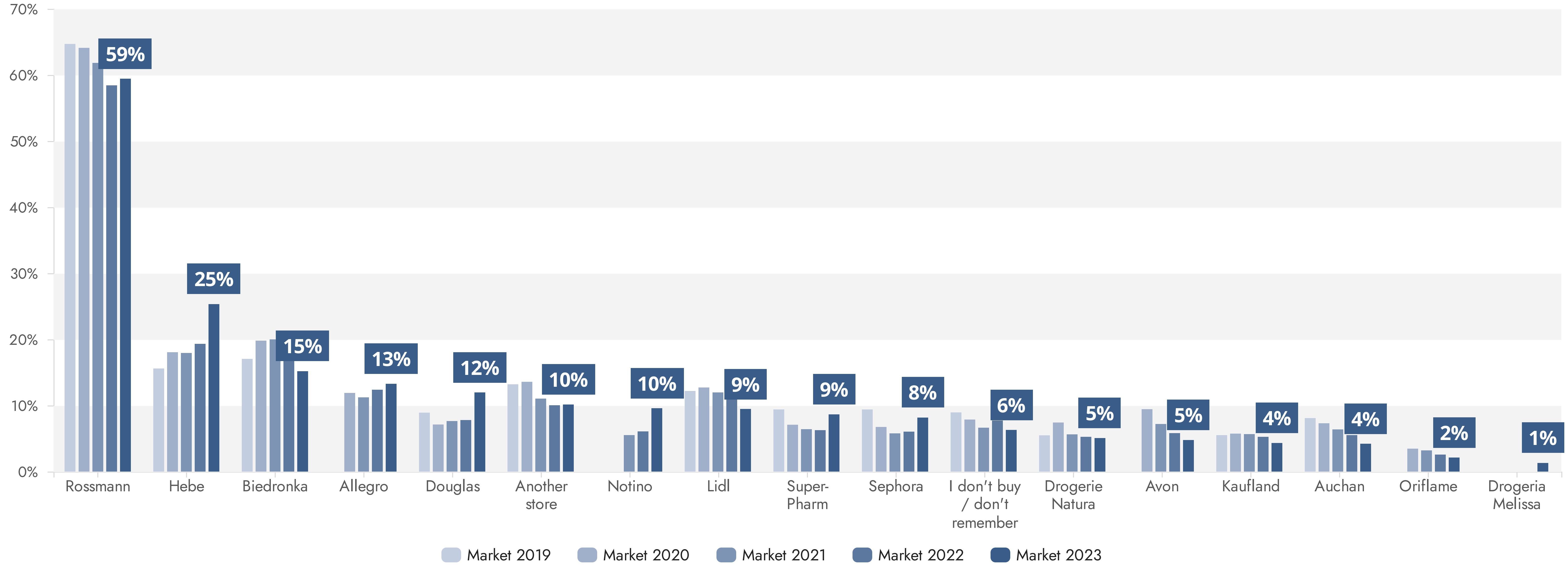


The vast majority of respondents buy products in this category in stationary stores, and as many as 74% of them do so in Rossmann chain stores. In the online channel, Allegro is the sales leader, followed by Notino and Rossmann and Hebe.

WHERE HAVE YOU RECENTLY PURCHASED COSMETICS, PERFUME OR HYGIENE PRODUCTS?

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

2019 = 4838, 2020 = 8619, 2021 = 12862, 2022 = 12886, 2023 = 10898

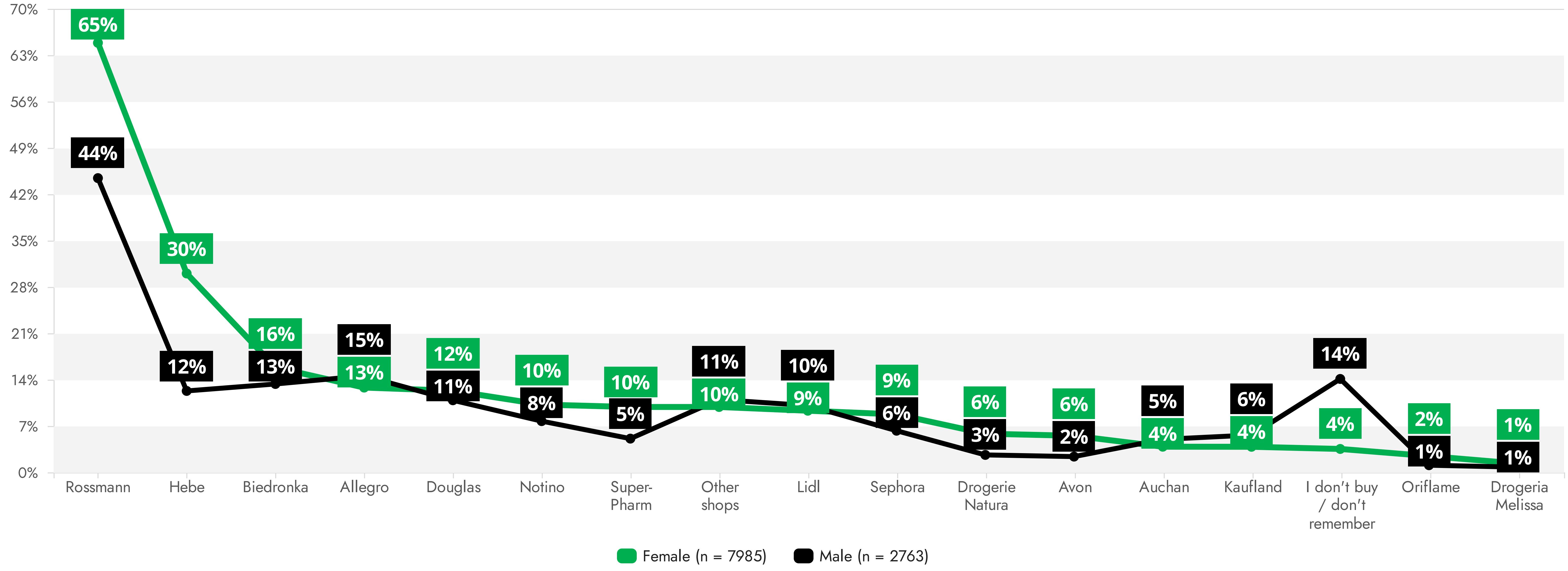


Comparing the Omnichannel 2023 results with last year's survey, we see an increase in the share of purchases at Rossmann (+1 p.p.), for the Hebe brand (as much as 6 p.p.), Allegro, Douglas, Notino and Sephora and Super-pharm. Noteworthy is the slight decrease in the share of "I don't buy/ don't remember" responses (-1 p.p.).

WHERE HAVE YOU RECENTLY PURCHASED COSMETICS, PERFUME OR HYGIENE PRODUCTS?

Analysis by gender

n = 10748



It's no surprise that women are more likely to buy these types of products than men, but regardless of gender for purchases we usually head to Rossmann stores, probably because it's the largest and most dispersed chain. Ladies also prefer Hebe and Biedronka stores, while men are more likely to go to Allegro, Lidl and hypermarkets (Auchan and Kaufland), which leads to the conclusion that men buy this type of product when doing other shopping.

WHERE HAVE YOU RECENTLY PURCHASED COSMETICS, PERFUME OR HYGIENE PRODUCTS?

Analysis by gender in 2023 with changes relative to 2022

n 2022 = 12459, 2023 = 10748

	Rossmann	Hebe	Biedronka	Allegro	Douglas	Notino	Super-Pharm	Other shops	Lidl	Sephora	Drogerie Natura	Avon	Auchan	Kaufland	I don't buy / don't remember	Oriflame	Drogeria Melissa	Result count
Female	64.9% -1.3pp	30% +5.2pp	15.9% -3.9pp	12.8% +0.8pp	12.3% +4.4pp	10.2% +3.7pp	9.9% +2.6pp	9.9% +0.2pp	9.3% -2.1pp	8.8% +2.6pp	5.8% -0.6pp	5.5% -1.7pp	3.9% -0.7pp	3.9% -0.6pp	3.5% -0.4pp	2.5% -0.4pp	1.3%	7985
Male	44.4% -0.6pp	12.3% +4.2pp	13.4% -3.1pp	14.6% +1pp	10.9% +3.2pp	7.7% +2.9pp	5.1% +1.2pp	11% -0.3pp	10.1% -1.8pp	6.3% +0.7pp	2.6% -0.1pp	2.4%	5% -2.4pp	5.6% -1.3pp	14.1% -2.4pp	1.1% -0.5pp	0.8%	2763

WHERE HAVE YOU RECENTLY PURCHASED COSMETICS, PERFUME OR HYGIENE PRODUCTS?

Analysis by province in 2023 with changes relative to 2022

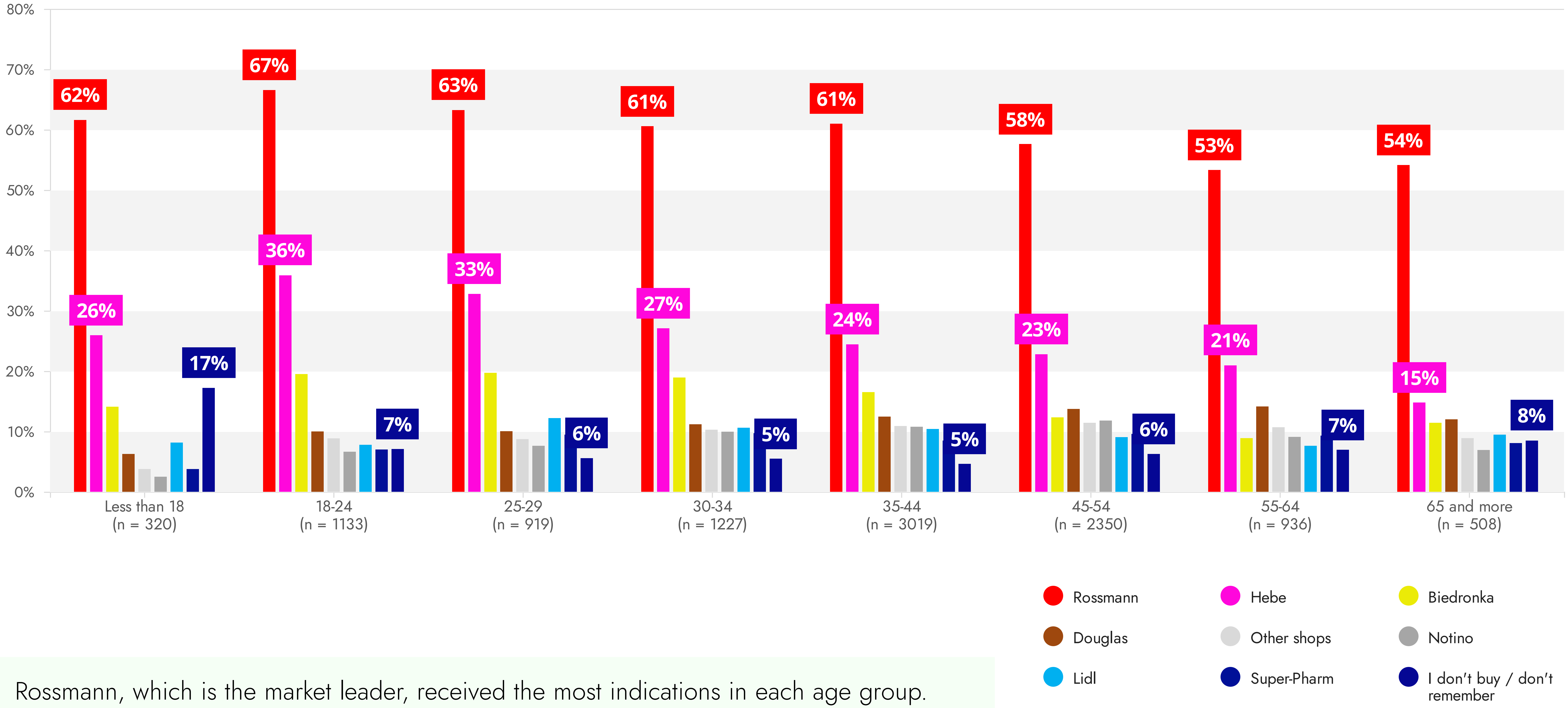
n 2022 = 11582, n 2023 = 8128

	Rossmann	Hebe	Allegro	Biedronka	Super-Pharm	Notino	Douglas	Other shops	Sephora	Lidl	I don't buy / don't remember	Auchan	Drogerie Natura	Kaufland	Avon	Drogeria Melissa	Oriflame	Result count
województwo mazowieckie	59.1% -2.2pp	28.1% +4.5pp	14.5% +1.4pp	14.3% -4.1pp	13.1% +3.8pp	12.1% +5.6pp	11.6% +2.3pp	11% +1pp	10.6% +2.1pp	8.7% -3.2pp	6.4% -2pp	5.8% -1.6pp	5% -0.3pp	4% -0.5pp	3.5% +0.1pp	0.9%	0.8% -0.8pp	1715
województwo śląskie	59.8% +0.4pp	25.4% +7.6pp	14.6% +1.7pp	15.9% -3.9pp	6.7% +2.2pp	7.8% +2.7pp	10.3% +5pp	8.5% -1.5pp	9.1% +4.3pp	9.9% -1.9pp	5.4% -2.1pp	4.8% -3.6pp	3.4% -1.1pp	5.9% +0.1pp	6.1% -1.2pp	1.7%	3.8% +0.2pp	1153
województwo wielkopolskie	60.4% -2pp	22.5% +5.7pp	13.1% +1.2pp	14.1% -5.9pp	7.5% +0.9pp	10.5% +4.2pp	10.4% +3.3pp	10.1% +0.1pp	8.3% +0.8pp	9.4% -3.1pp	6% -0.9pp	3.2% -0.2pp	4.2% -0.3pp	3.5% -1.6pp	5.2% -3.2pp	1.7%	1.9% -0.5pp	962
województwo dolnośląskie	61.5% +2pp	25.1% +3.5pp	14.8% +2.6pp	17% -1.2pp	9.8% +3pp	10.9% +4pp	12.8% +5.5pp	11.7% +1.8pp	6.5% +1.6pp	10.1% +0.3pp	6.5% -1.9pp	3.2% -1.4pp	4.7% +1.4pp	4.5% -2pp	6.3% +1.6pp	0.9%	2.4% -0.2pp	805
województwo małopolskie	60.5% +3.4pp	25.6% +8.7pp	12.4% -1.2pp	15.9% -3.2pp	11.8% +4.5pp	11.5% +4.6pp	12.7% +5.5pp	10.5% +1.1pp	6.8% +0.6pp	9.8% -1.5pp	6.3% -1.7pp	6.2% -0.4pp	5.1% -0.7pp	4.8% -1.2pp	3.6% -0.4pp	1.4%	1.2% -0.5pp	731
województwo pomorskie	61.5% -2.5pp	25.7% +5.6pp	11.2% +0.6pp	17.1% -0.8pp	9.2% +2.9pp	9.8% +2.4pp	13.2% +4.3pp	9.4% +0.1pp	8.1% +2.3pp	11.2% -2.3pp	5.8% -0.9pp	4.7% -2pp	3.4% +0.1pp	3% -1.2pp	3.7% -2pp	1%	1.7% -0.8pp	703
województwo łódzkie	64.2% +0.6pp	24.3% +4.4pp	13.2% +0.3pp	15.2% -2.9pp	6.7% +1.2pp	9.6% +4.6pp	9.9% +2.2pp	10.6% +1.7pp	7.3% +1.8pp	9.1% -2.7pp	5.7% -2.5pp	4.6% +1.2pp	5.1% +0.5pp	4.2% -0.8pp	5.2% -1.5pp	3.5%	3% +0.3pp	593
województwo zachodniopomorskie	60.8% -2.3pp	23.3% +2pp	11.3% -0.4pp	13.9% -6.1pp	10.3% +4pp	11.1% +4.6pp	15.9% +5.2pp	8.9% -2pp	8.2% +1.9pp	9.4% -3.7pp	4.8% -2.2pp	2.9% +0.3pp	6.2% -2.9pp	4.3% -0.1pp	5.7% +1.8pp	0.5%	3.1% +0.7pp	584
województwo kujawsko-pomorskie	62.1% +2.2pp	20.4% +0.9pp	15% +2.6pp	14.8% -5.8pp	8.1% +1.5pp	7.7% +1.6pp	12.8% +4.2pp	12.3% +3.7pp	7.9% +3pp	7.9% -3.8pp	5.1% -2.2pp	4.5% -2.1pp	5.1%	2.8% -2.1pp	6.1% -1.1pp	0.6%	1.6% -1.5pp	494
województwo lubelskie	58.2% -1.2pp	26.5% +5.4pp	14.4% +0.6pp	14.9% -6.4pp	4.4% +1.4pp	8.2% +4.6pp	8.8% +3.5pp	11.9% +0.8pp	5.2% +0.5pp	10.6% -0.3pp	7.5% +0.1pp	3.4% -2.1pp	9.8% -0.2pp	6.4% -0.6pp	3.1% -5pp	0.3%	1.5% -0.2pp	388

WHERE HAVE YOU RECENTLY PURCHASED COSMETICS, PERFUME OR HYGIENE PRODUCTS?

Analysis by age

n = 10412

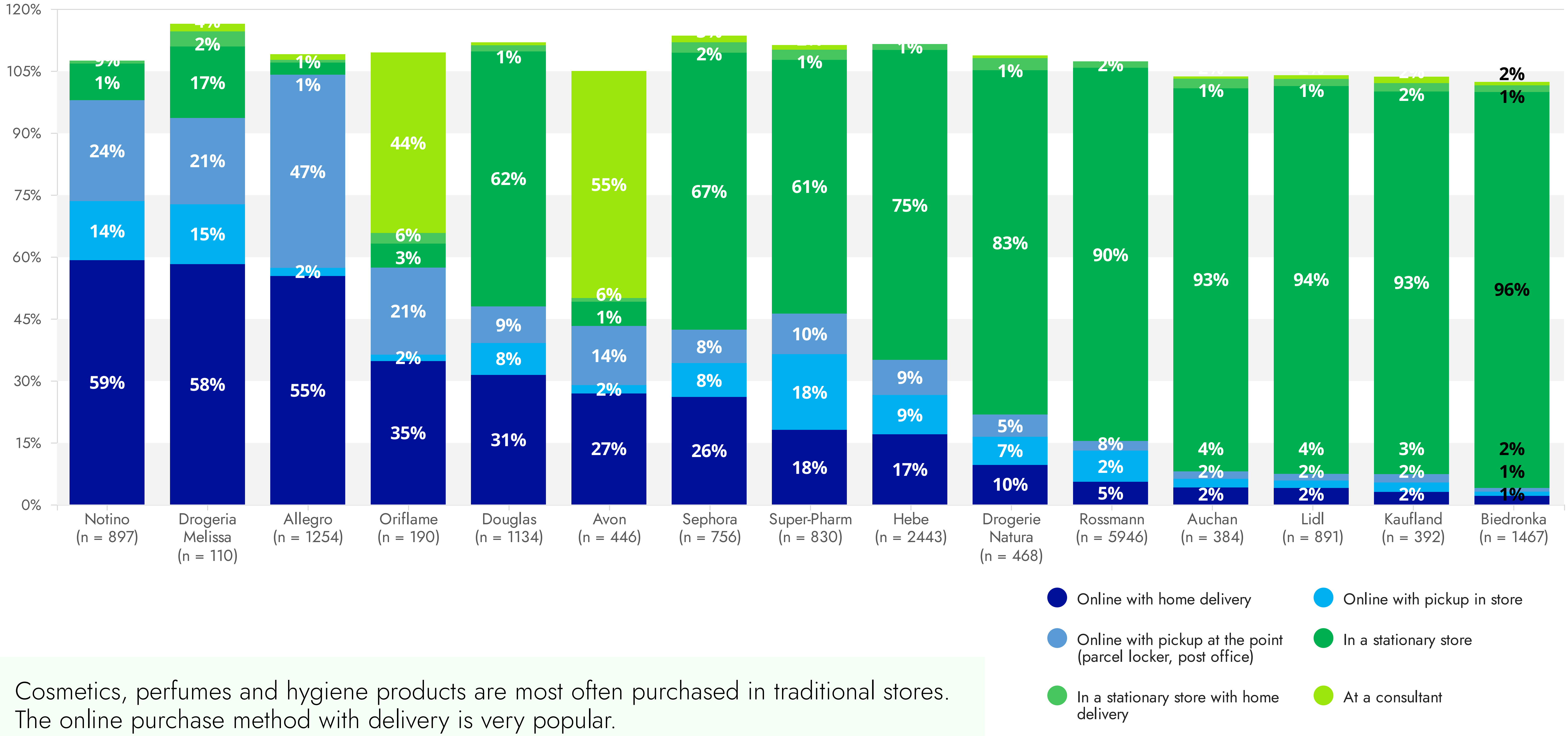


Rossmann, which is the market leader, received the most indications in each age group. Hebe ranked second in each age group.

HOW DID YOU BUY PRODUCTS THERE?

Purchasing channel of choice - multiple choice question

n = 8808



Cosmetics, perfumes and hygiene products are most often purchased in traditional stores. The online purchase method with delivery is very popular.

HOW DID YOU BUY PRODUCTS THERE?

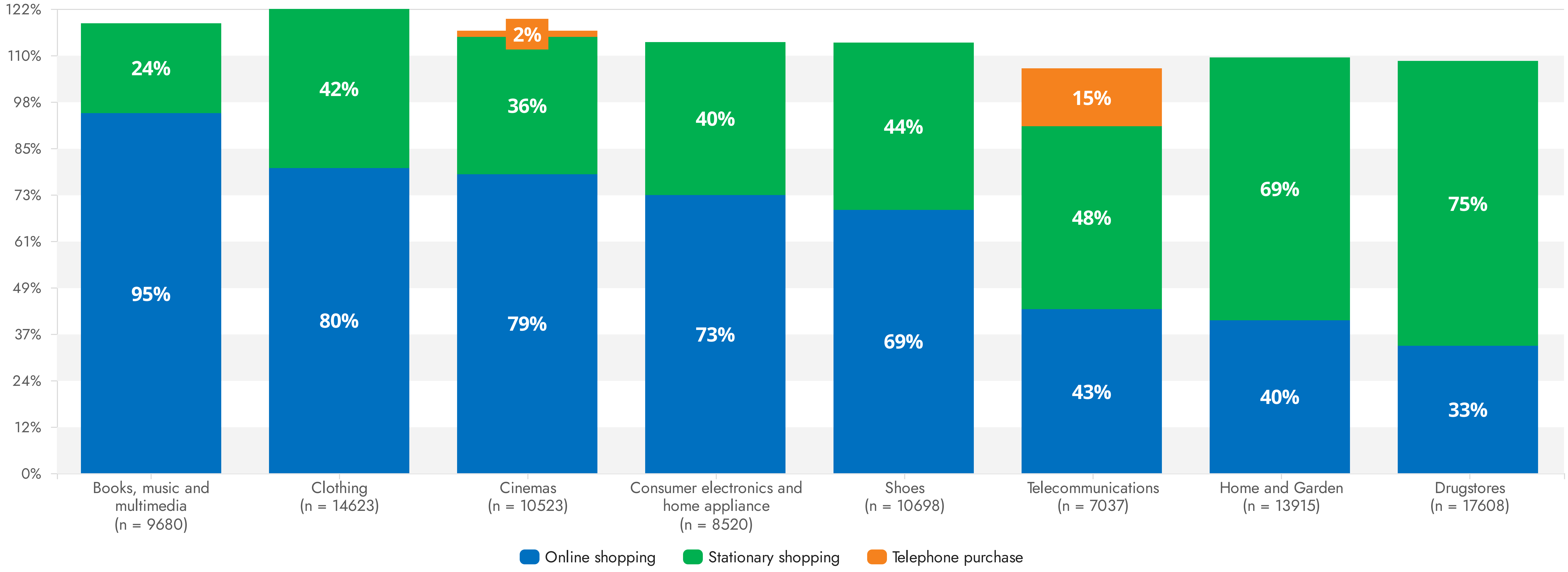
Purchasing channel of choice - Omnichannel 2023 with changes from 2022

n 2022 = 7547, 2023 = 7286

	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
Rossmann	5.5% +2.7pp	7.6% +2.6pp	2.4%	90.3% +1pp	1.5%	5946
Hebe	17% +3.4pp	9.5% +3.6pp	8.5%	75.1% +3.8pp	1.4% -0.3pp	2443
Biedronka	2.1% +0.6pp	1% +0.1pp	0.9%	95.9% +0.7pp	1.6% -0.1pp	1467
Allegro	55.3% +7pp	2% +1.4pp	46.7%	3% -0.6pp	0.6%	1254
Douglas	31.4% +7.2pp	7.8% +1.4pp	8.8%	61.7% +1.2pp	1.5% -0.5pp	1134
Notino	59.2% +1.7pp	14.3% +4.5pp	24.4%	8.9% +1.6pp	0.7% -0.7pp	897
Lidl	4% +1.7pp	1.8% +0.8pp	1.6%	93.9% +0.7pp	1.7% -0.3pp	891
Super-Pharm	18.1% +4pp	18.3% +6.3pp	9.9%	61.4% -2.9pp	2.4% +0.1pp	830
Sephora	26.1% +5.8pp	8.2% +4pp	8.1%	67.1% +0.6pp	2.5% +0.3pp	756
Drogerie Natura	9.6%	6.8%	5.3%	83.3%	3%	468

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

Comparison of channels chosen between industries

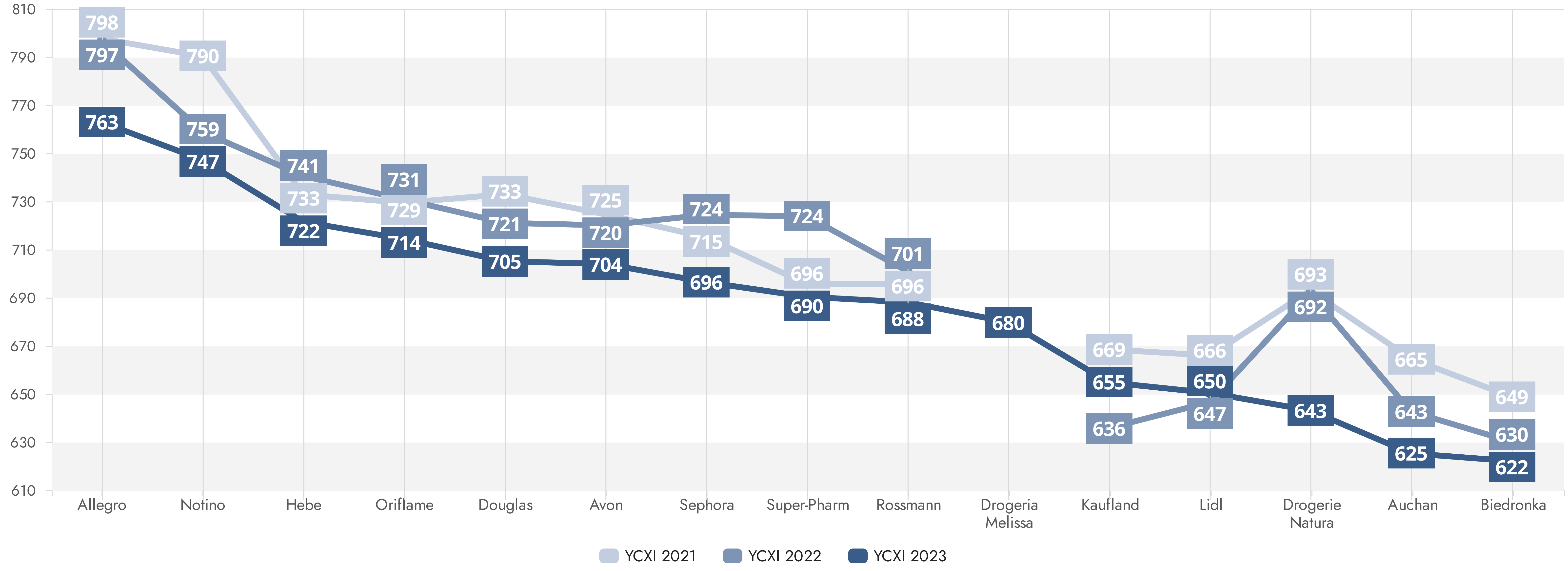


Comparing the purchase methods of drugstore products with the industries studied in Omnichannel 2023, it is apparent how large a share stationary sales have and how much potential there is for growth in online sales.

EXPERIENCE QUALITY INDICATORS

YOUR CUSTOMER EXPERIENCE INDEX

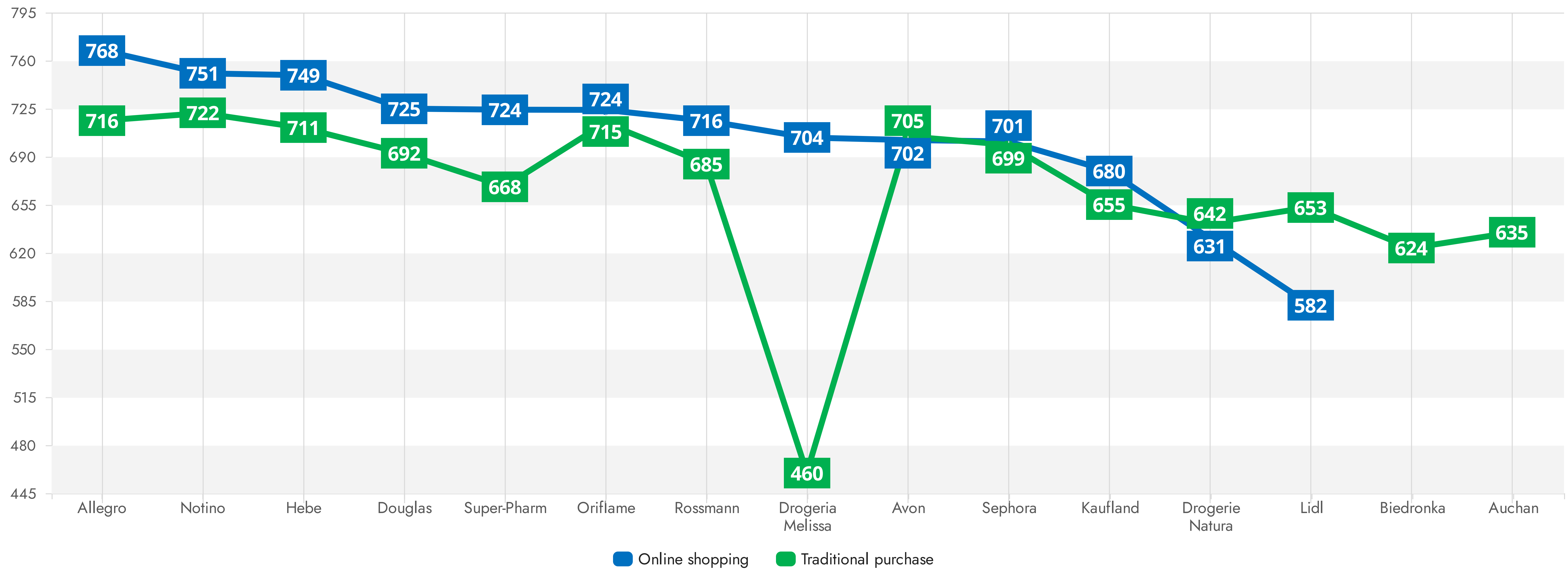
Quality index on a scale of 0 to 1000 taking into account four satisfaction factors:
availability and selection of products, ease of ordering, satisfaction with purchase, willingness to recommend the store to friends



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 companies scored just over three-quarters of the possible points. The industry leaders are Allegro, Notino and Hebe. The least rated are the supermarkets (Biedronka, Auchan, Lidl and Kaufland) and Natura Drugstore.

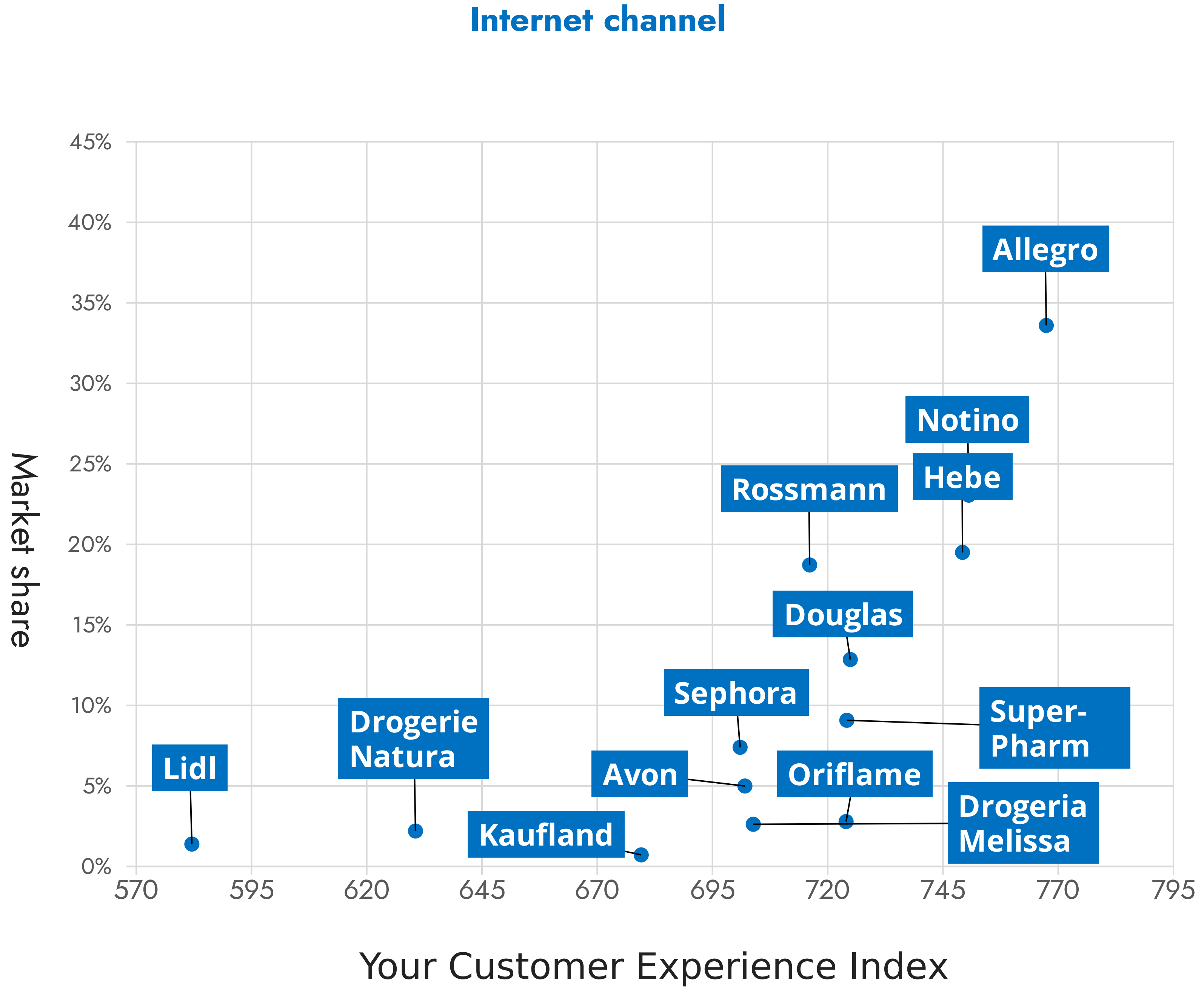
YOUR CUSTOMER EXPERIENCE INDEX

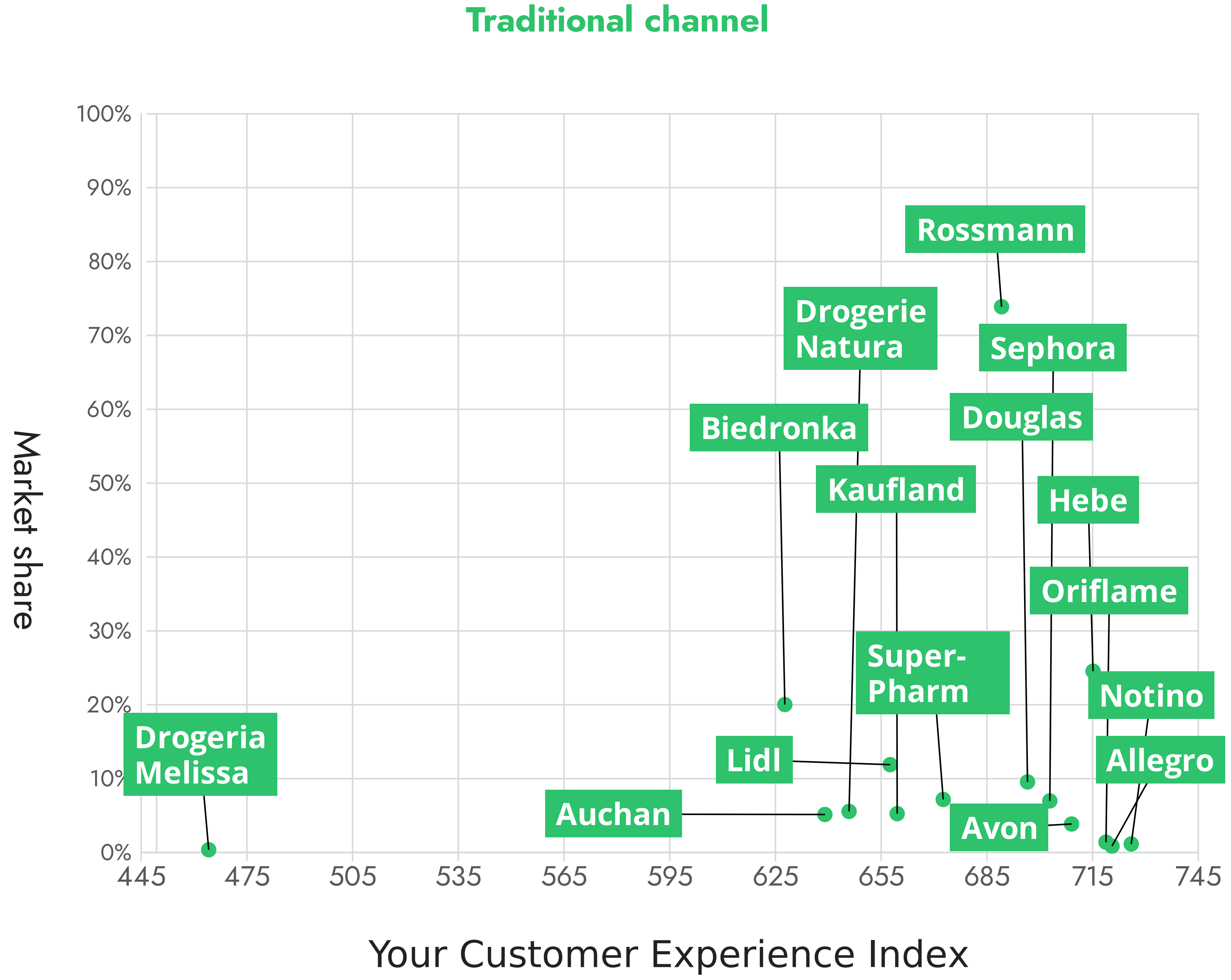
Quality index on a scale of 0 to 1000, broken down by purchasing channel



For most of the brands surveyed, the online channel is rated much better than the stationary channel. The situation is reversed for Avon, Drugstore Natura and in markets, i.e. entities with a strongly developed stationary sales channel.

YOUR CUSTOMER EXPERIENCE INDEX

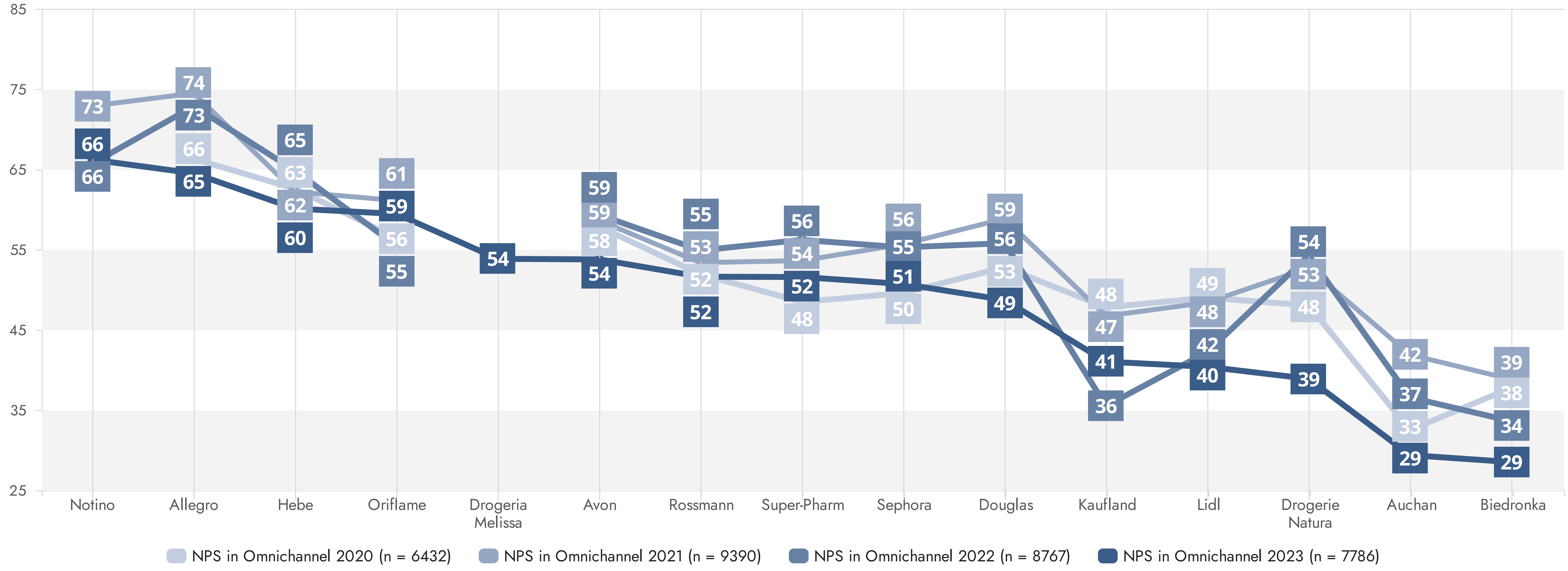




The charts show market shares by sales channel and Your Customer Experience Index value. The online channel is dominated by Allegro which has both the largest market share and the highest index value. In the stationary channel, Rossmann has the largest share, but is far from the leader in the experience area.

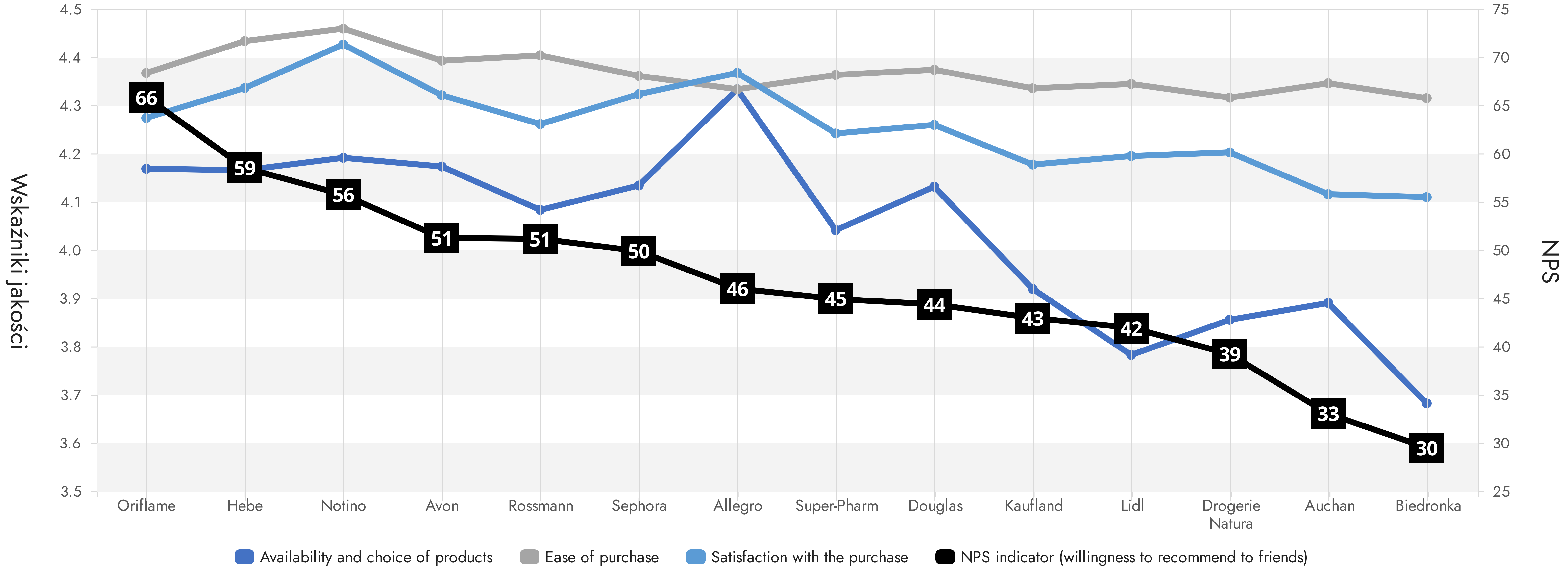
HOW LIKELY ARE YOU TO RECOMMEND THESE STORES TO YOUR FRIENDS?

Comparison of NPS index values against previous survey editions



TRADITIONAL CHANNEL - EXPERIENCE QUALITY RATINGS

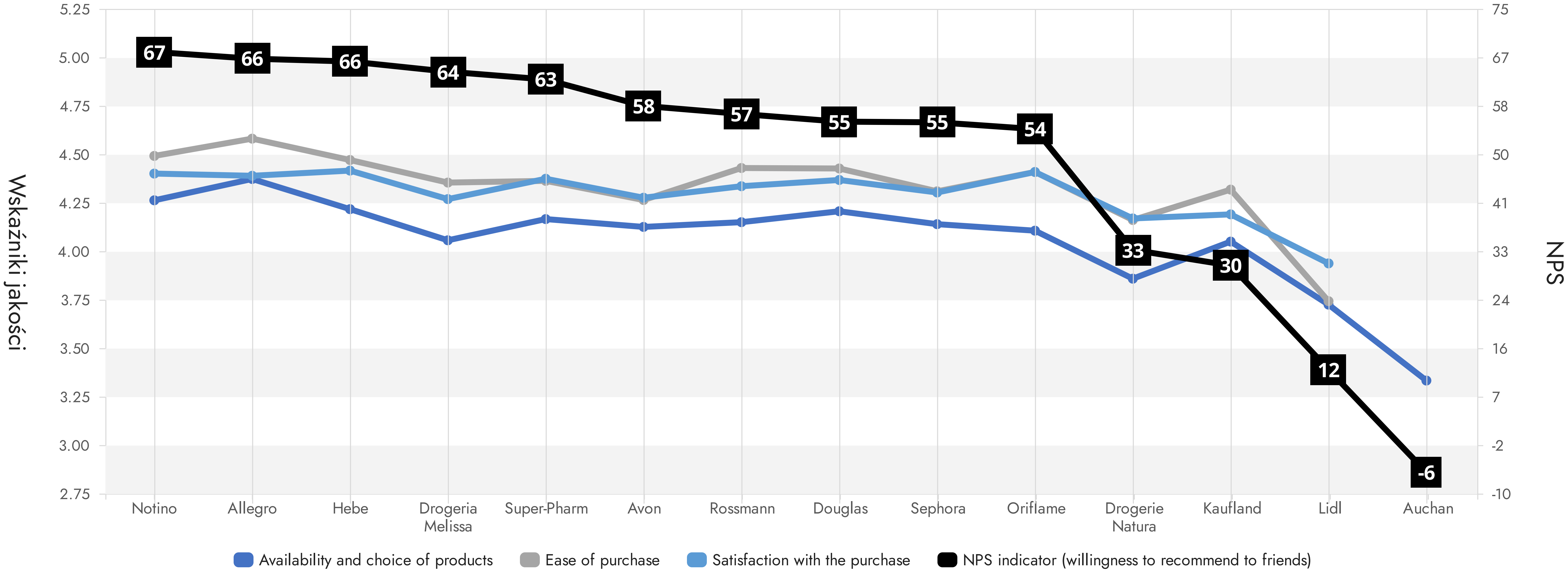
Quality ratings on a scale of 1 to 5 and NPS index on a scale of -100 to 100



The smallest selection and lowest shopping satisfaction is at Melissa Drugstore. At Notino, according to respondents, it is the easiest to make a purchase and satisfaction with the purchase is the highest. The best availability was received for Allegro.

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 Notino and Hebe brands, where high ratings for ease of purchase and satisfaction with the purchase are correlated with a high likelihood of recommending the brand to friends.

SHOPPING PREFERENCES IN THE STATIONARY CHANNEL

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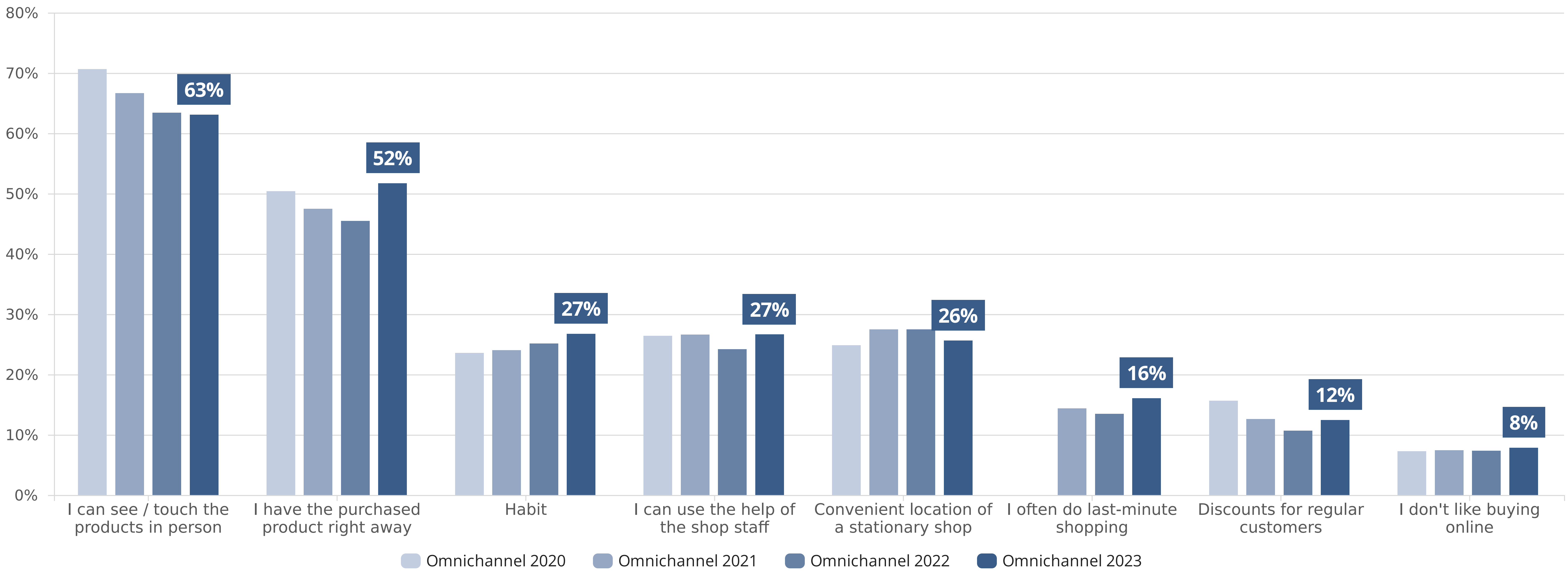
WHY DO YOU PREFER SHOPPING FOR COSMETICS, PERFUME OR HYGIENE PRODUCTS IN A STATIONARY STORE?

Traditional channel - Multiple choice question

n 2020 = 2983, 2021 = 5456, 2022 = 4477, 2023 = 2940



WHY DO YOU PREFER SHOPPING FOR COSMETICS, PERFUME OR HYGIENE PRODUCTS IN A STATIONARY STORE?

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

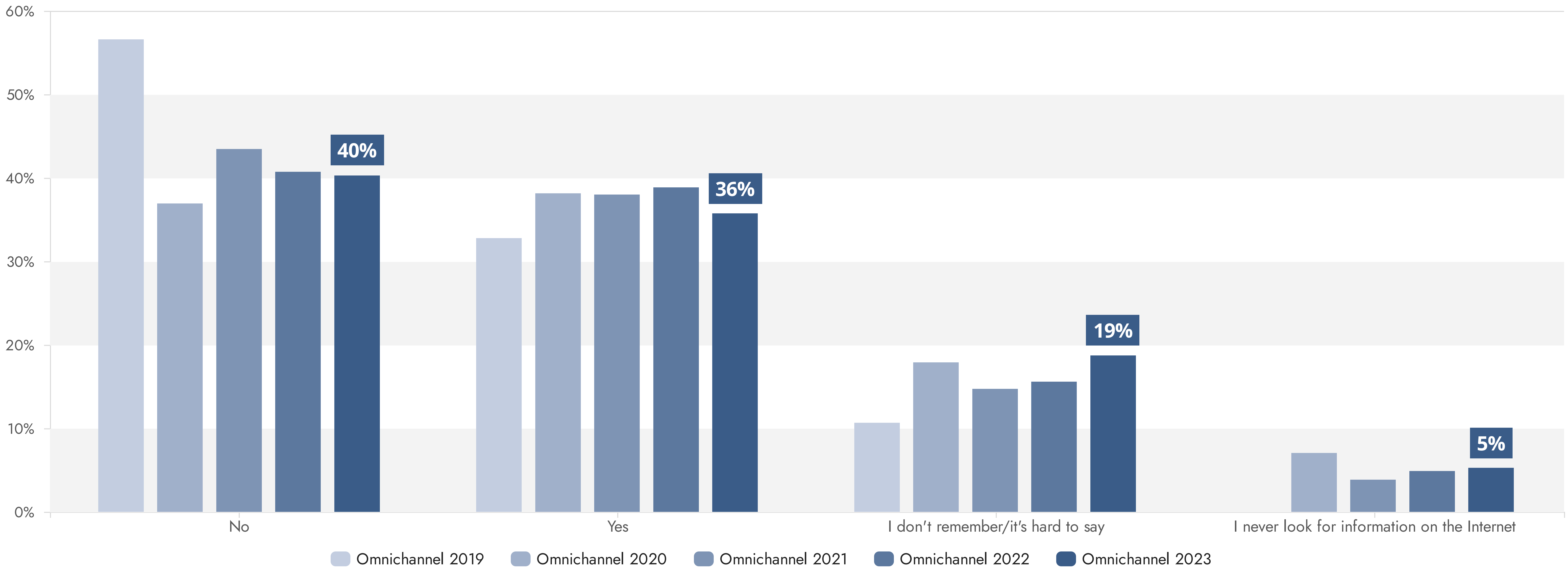
n = 2940

	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		31.7%	13.4%	57.9%	28%	24.6%	7.4%	17.2%	1854
I can use the help of the shop staff	75.1%		22.9%	62.6%	34.1%	27.7%	8.8%	17.5%	783
Discounts for regular customers	68.2%	49%		63%	37.5%	31.2%	9.6%	17.8%	365
I have the purchased product right away	70.6%	32.3%	15.1%		34.4%	29.9%	7.7%	21.5%	1519
Convenient location of a stationary shop	68.9%	35.5%	18.2%	69.5%		36.3%	9.2%	23.4%	753
Habit	58.1%	27.6%	14.5%	57.8%	34.7%		8.3%	22.5%	786
I don't like buying online	59.6%	30%	15.2%	50.9%	30%	28.3%		15.2%	230
I often do last-minute shopping	67.5%	29.1%	13.8%	69.2%	37.4%	37.6%	7.4%		471

BEFORE YOUR LAST PURCHASE OF COSMETICS, PERFUME OR HYGIENE PRODUCTS IN A STATIONARY STORE, DID YOU LOOK FOR INFORMATION ON THE INTERNET?

Traditional channel - Multiple choice question

n 2019 = 2832, 2020 = 4341, 2021 = 5139, 2022 = 4213, 2023 = 2921

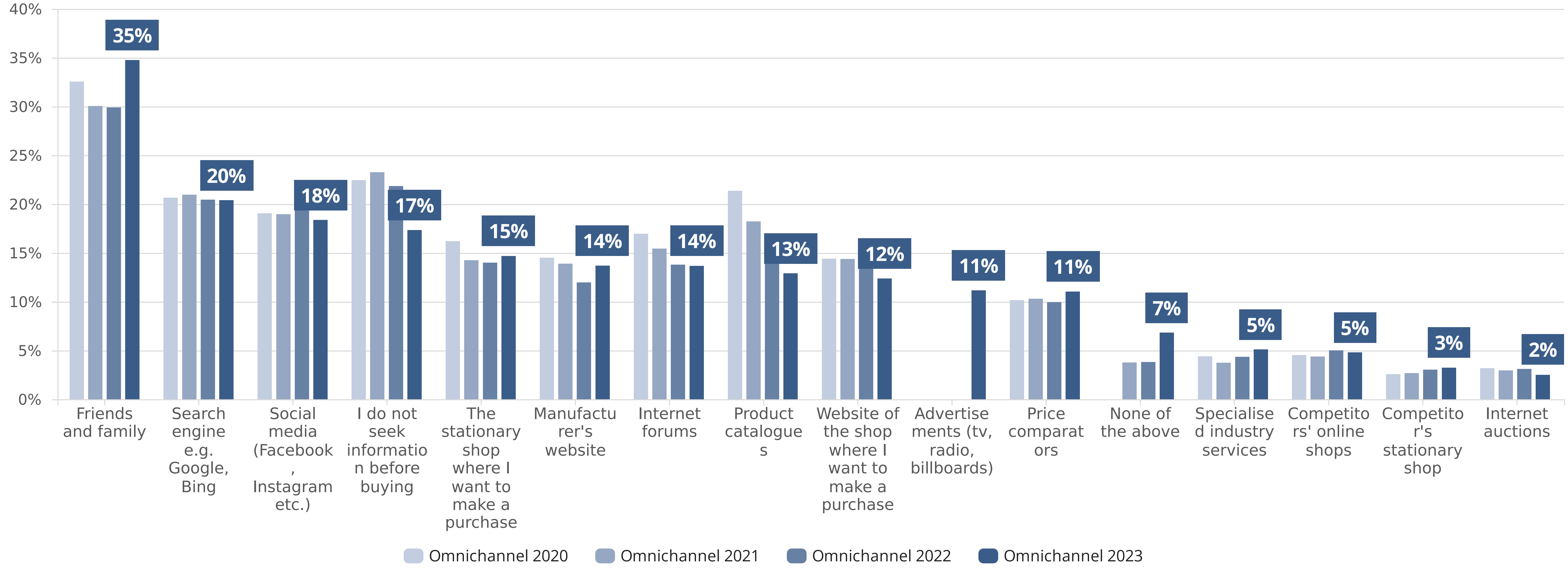


We can clearly see a decline in the share of people who look online for product information, reviews or product comparisons with others before making a purchase.

WHERE DO YOU GET INFORMATION ABOUT COSMETICS, PERFUMES OR HYGIENE PRODUCTS BEFORE YOU BUY THEM?

Traditional channel - Multiple choice question

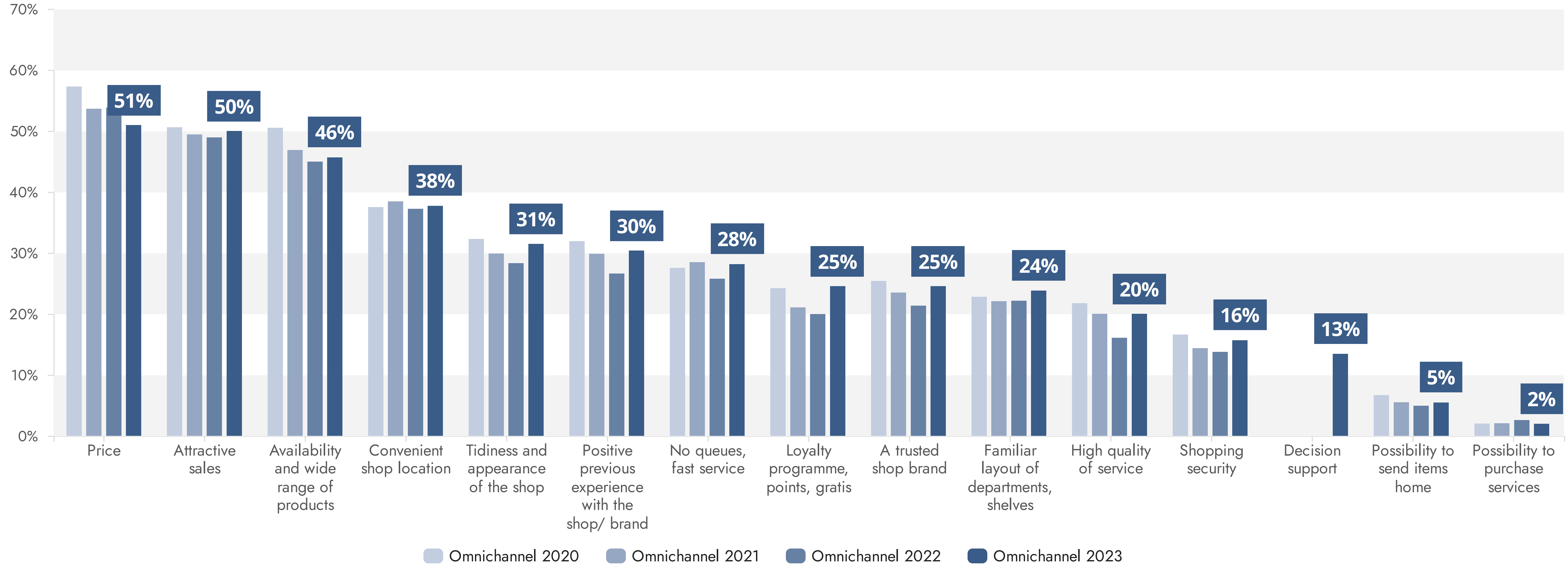
n 2020 = 4295, 2021 = 5105, 2022 = 4222, 2023 = 2922



WHAT IS MOST IMPORTANT TO YOU WHEN SHOPPING FOR COSMETICS, PERFUME OR HYGIENE PRODUCTS IN A STATIONARY STORE?

Traditional channel - Multiple choice question

n 2020 = 3501, 2021 = 4272, 2022 = 3487, 2023 = 2477

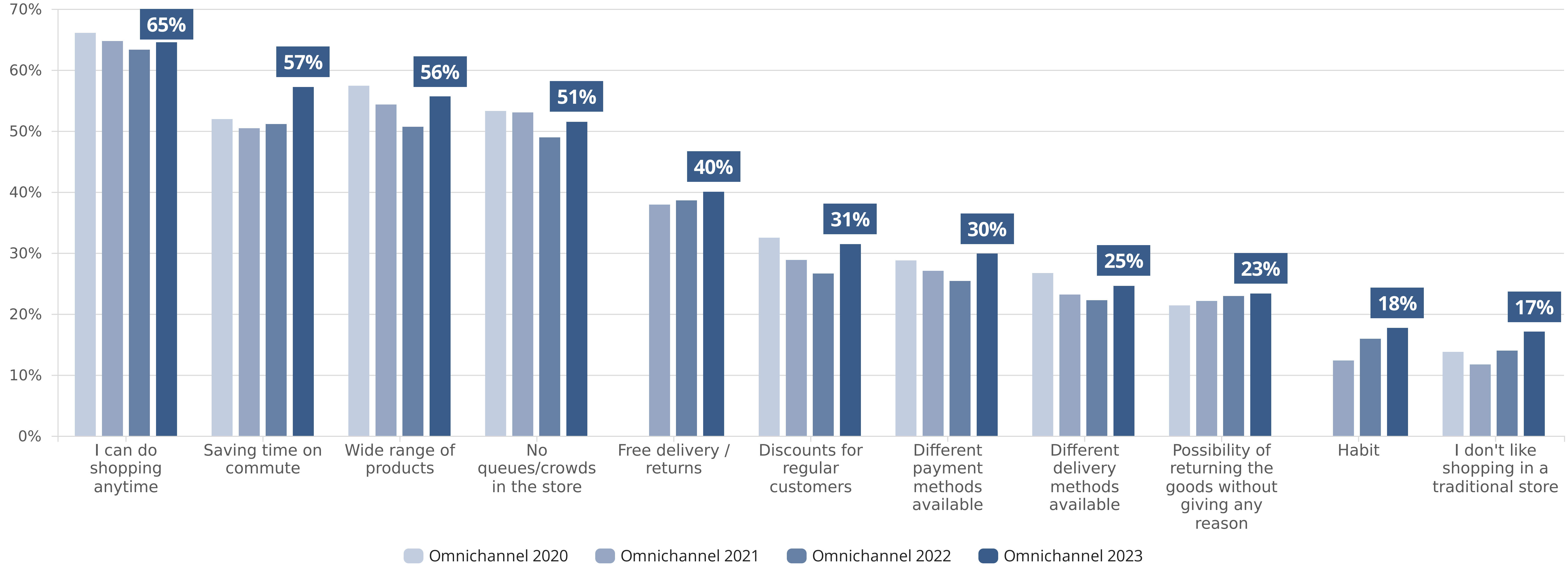


SHOPPING PREFERENCES IN THE ONLINE CHANNEL

WHY DO YOU PREFER TO SHOP FOR COSMETICS, PERFUME OR HYGIENE PRODUCTS IN AN ONLINE STORE?

Internet channel - Multiple choice question

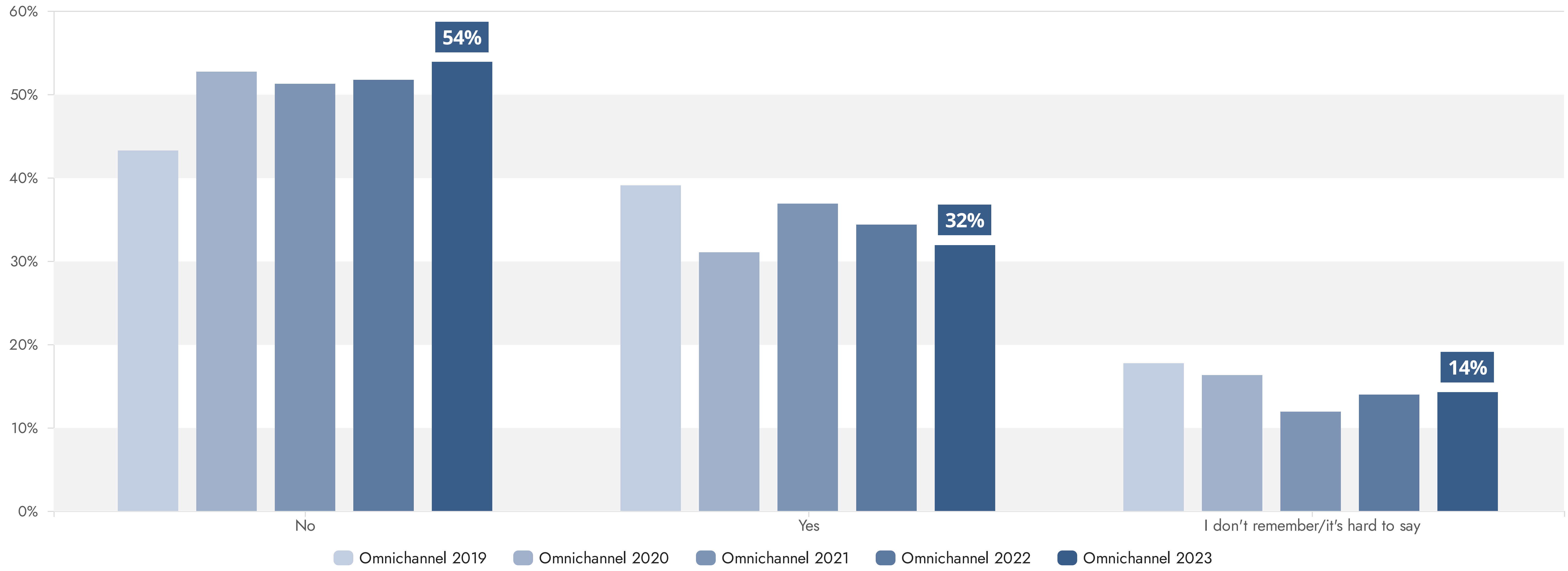
n 2020 = 828, 2021 = 1394, 2022 = 1327, 2023 = 1172



BEFORE THE LAST TIME YOU BOUGHT COSMETICS, PERFUME OR HYGIENE PRODUCTS ONLINE, DID YOU VISIT STATIONARY STORES TO FAMILIARIZE YOURSELF WITH THE PRODUCT?

Internet channel - Multiple choice question

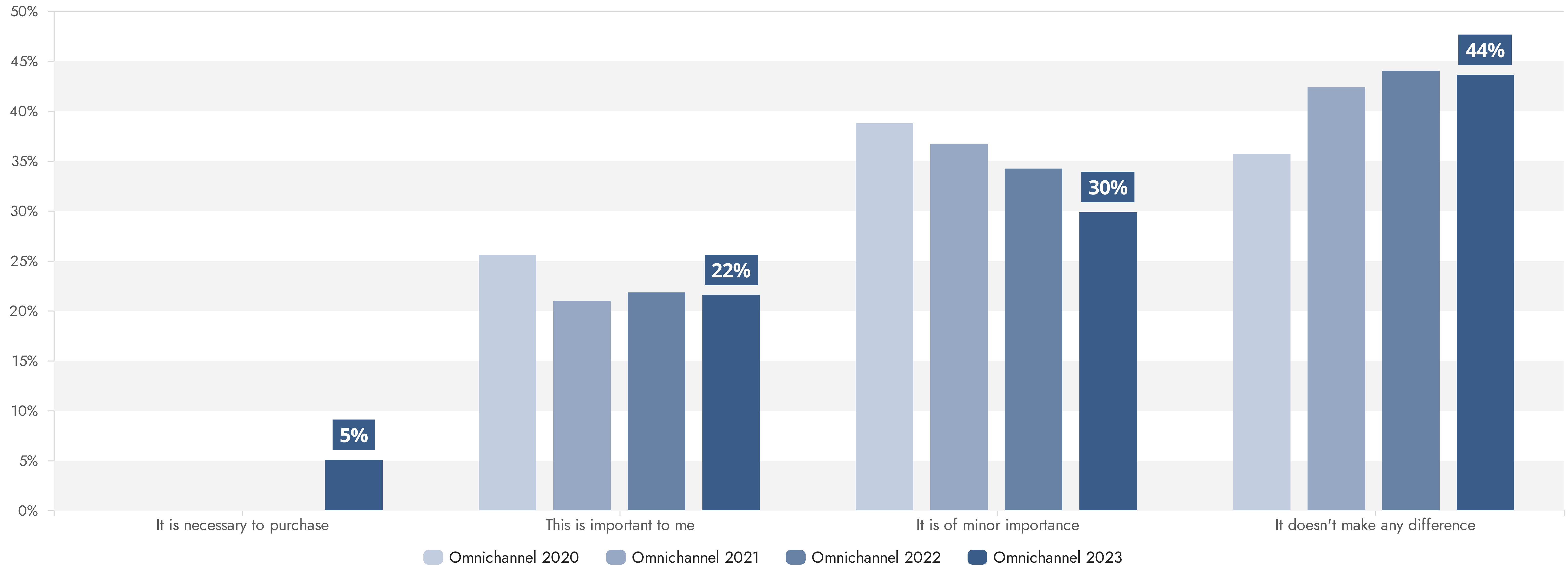
n 2019 = 192, 2020 = 780, 2021 = 1142, 2022 = 1112, 2023 = 1082



DO YOU TAKE INTO ACCOUNT THE PRESENCE OF A BRAND'S STATIONARY STORE IN YOUR AREA WHEN PLANNING YOUR ONLINE SHOPPING?

Internet channel - Multiple choice question

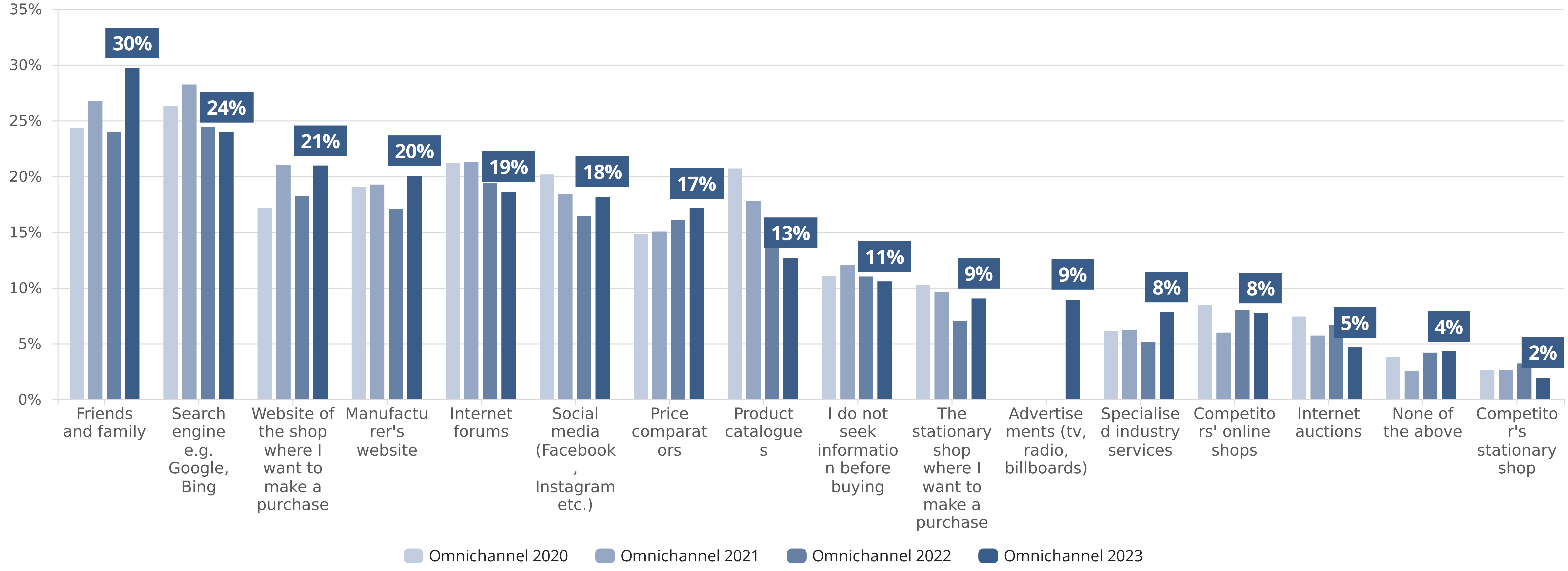
n 2019 = 180, 2020 = 743, 2021 = 1126, 2022 = 1082, 2023 = 1053



WHERE DO YOU GET INFORMATION ABOUT COSMETICS, PERFUMES OR HYGIENE PRODUCTS BEFORE YOU BUY THEM?

Internet channel - Multiple choice question

n 2020 = 769, 2021 = 1138, 2022 = 1127, 2023 = 1098

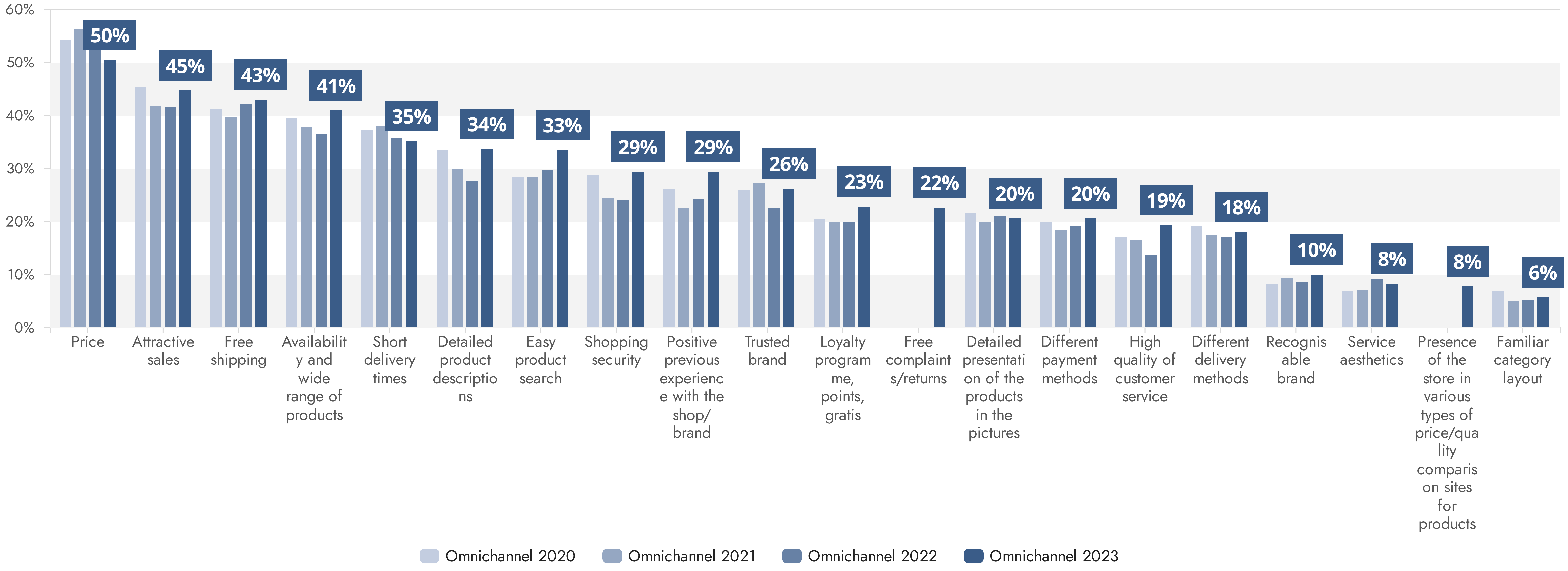


Relative to previous editions of the survey, the shares of indications of acquaintances, friends and family, website and manufacturer and social media sites or price comparison sites increased.

WHAT IS MOST IMPORTANT TO YOU WHEN SHOPPING FOR COSMETICS, PERFUME OR HYGIENE PRODUCTS AT AN ONLINE STORE?

Internet channel - Multiple choice question

n 2020 = 575, 2021 = 918, 2022 = 900, 2023 = 850

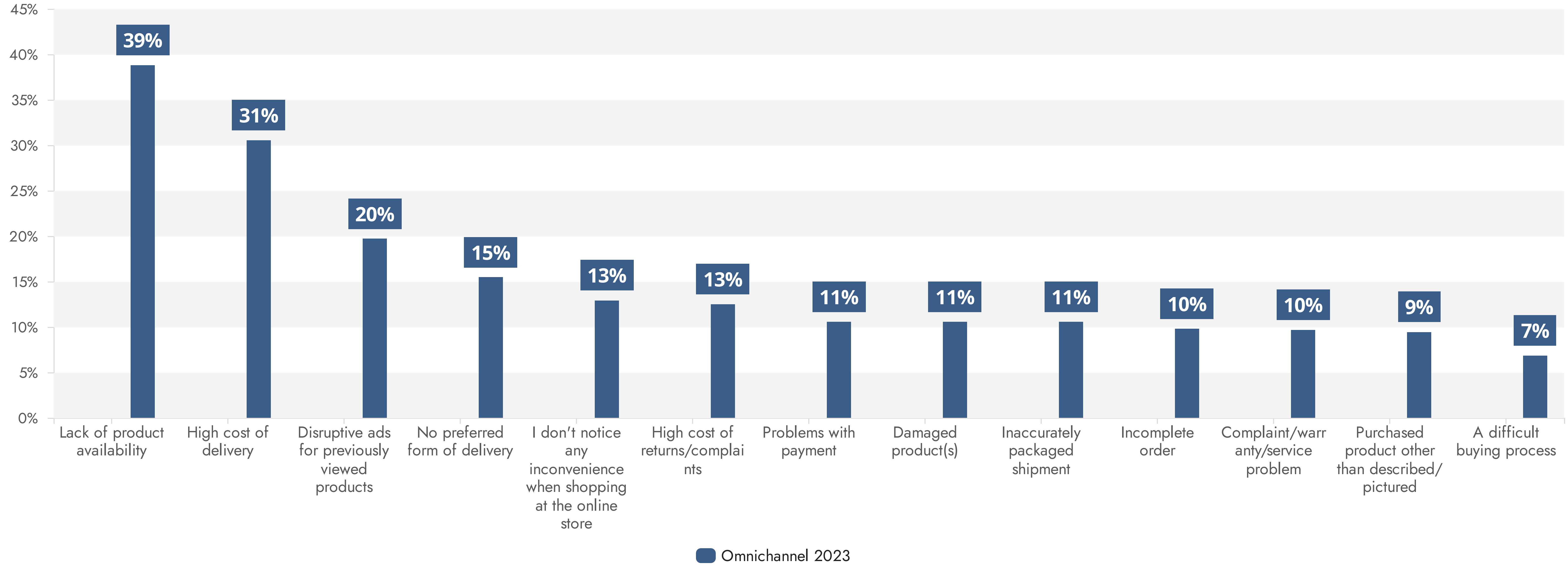


All the circumstances surrounding a purchase are becoming increasingly important, from the cost of delivery or lack thereof, a wide selection of products, detailed product descriptions or easy product search, as well as shopping security and high quality service.

WHAT INCONVENIENCES DO YOU ENCOUNTER WHEN SHOPPING FOR COSMETICS, PERFUME OR HYGIENE PRODUCTS IN AN ONLINE STORE?

Internet channel - Multiple choice question

n 2021 = 825, 2022 = 811, 2023 = 776

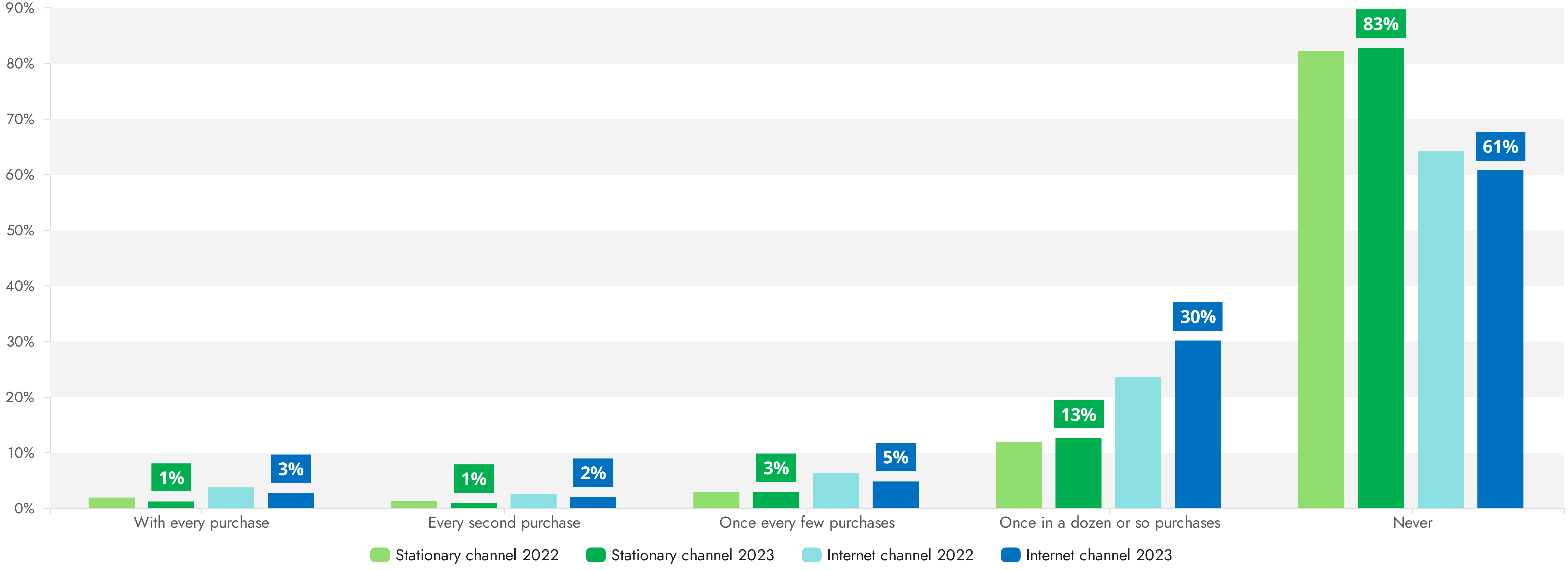


POST-PURCHASE EXPERIENCE

HOW OFTEN DO YOU FIND YOURSELF RETURNING COSMETICS, PERFUMES OR HYGIENE PRODUCTS (COMPLAINT/RETURN/EXCHANGE)?

One-choice question.

n 2022 = 3469, 2023= 2473

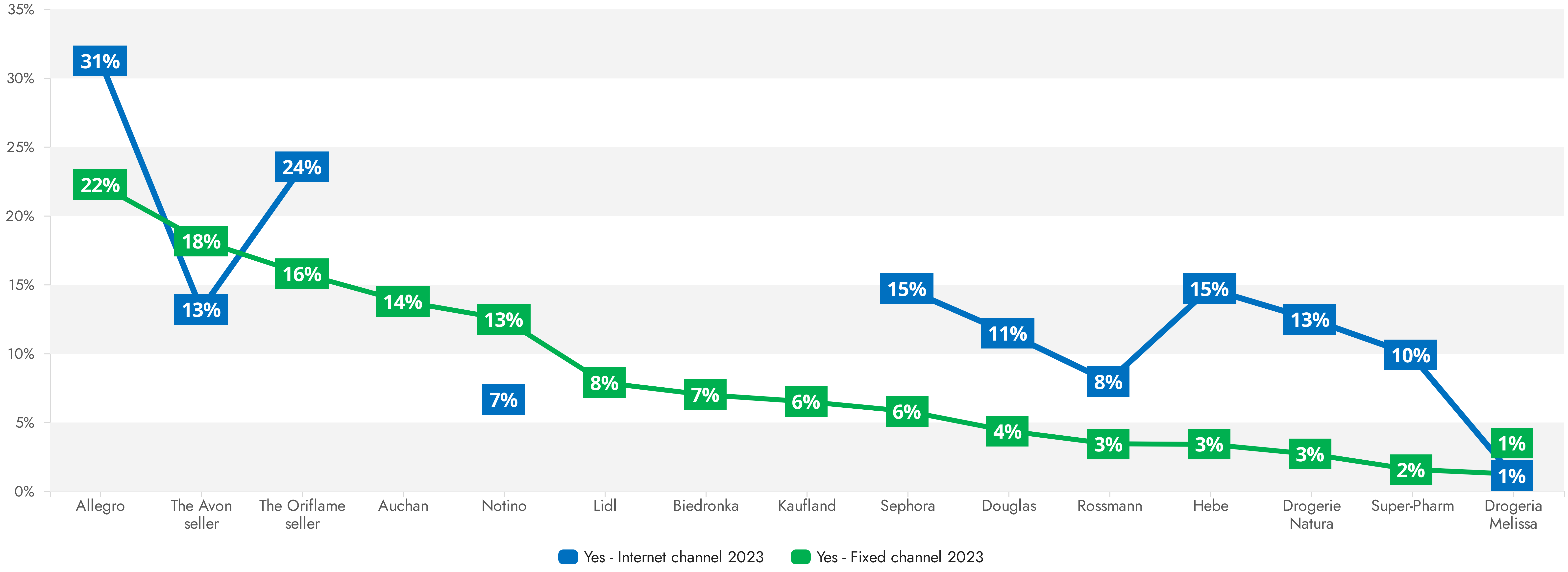


We already know that the ecommerce segment is going from strength to strength, but it should be noted that the share of returns of purchased products in this channel is much higher than in traditional sales, which in turn is associated with increased work of after-sales service.

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

Analysis of customers in contact with Customer Service Offices

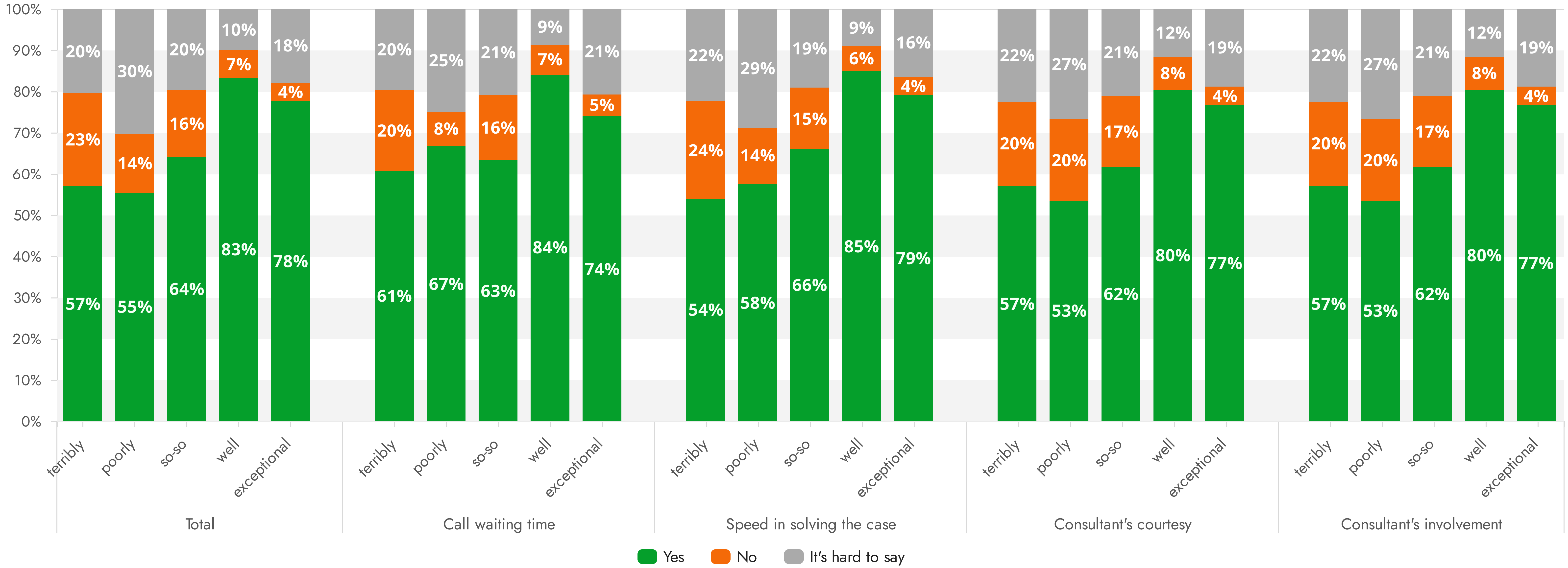
n internet channel = 1269, n fixed channel = 2577



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

Single-choice matrix question

n = 1623



Negative ratings of consultant engagement still 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 fateful rating is the consultant's commitment, the speed with which the matter is resolved, and the consultant's courtesy and time to resolve the matter.

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

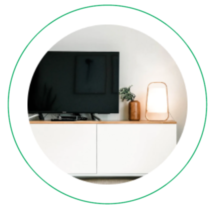

Drugstores


Footwear


Pharmacies


Telecommunicati


Home and garden


CONSUMER ELECTRONICS


Books, multimedia


Subscription media (Streaming, VOD, Audiobooks).

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