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

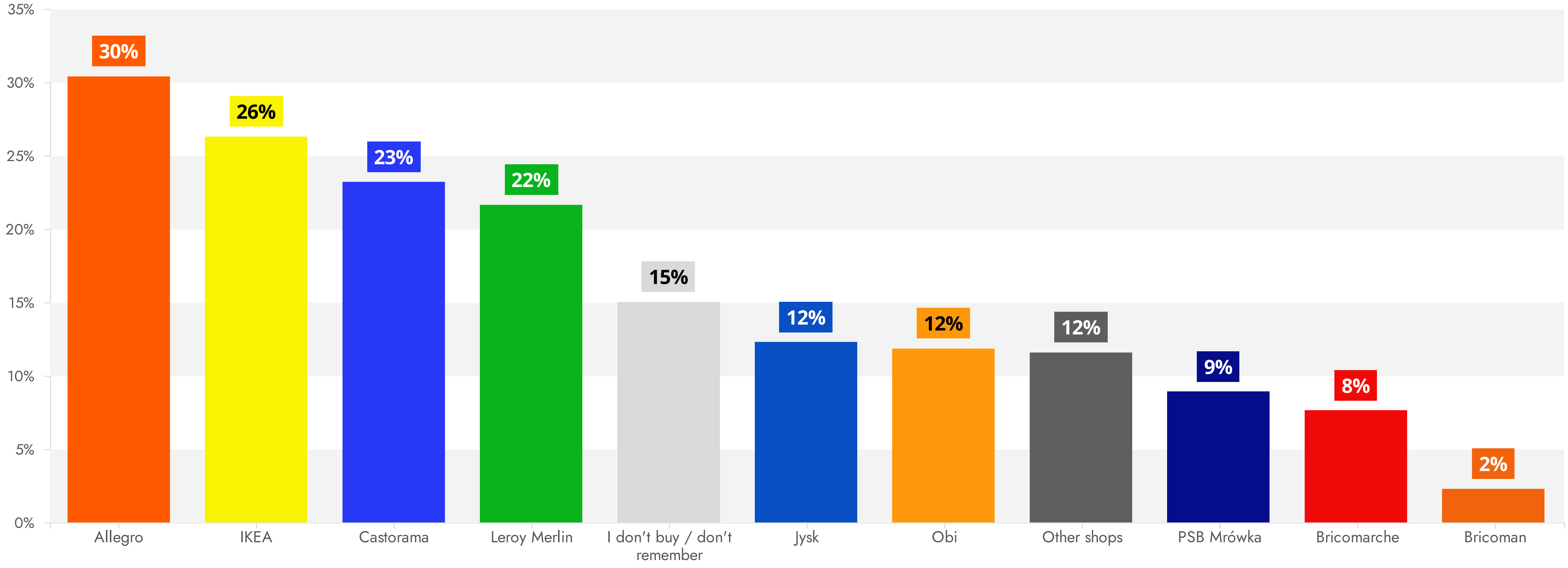
EXAMPLES OF CALCULATIONS FOR COMPANY XYZ

	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 ITEMS FOR THE HOME, GARDEN, DIY?

Multiple choice question

n = 11015

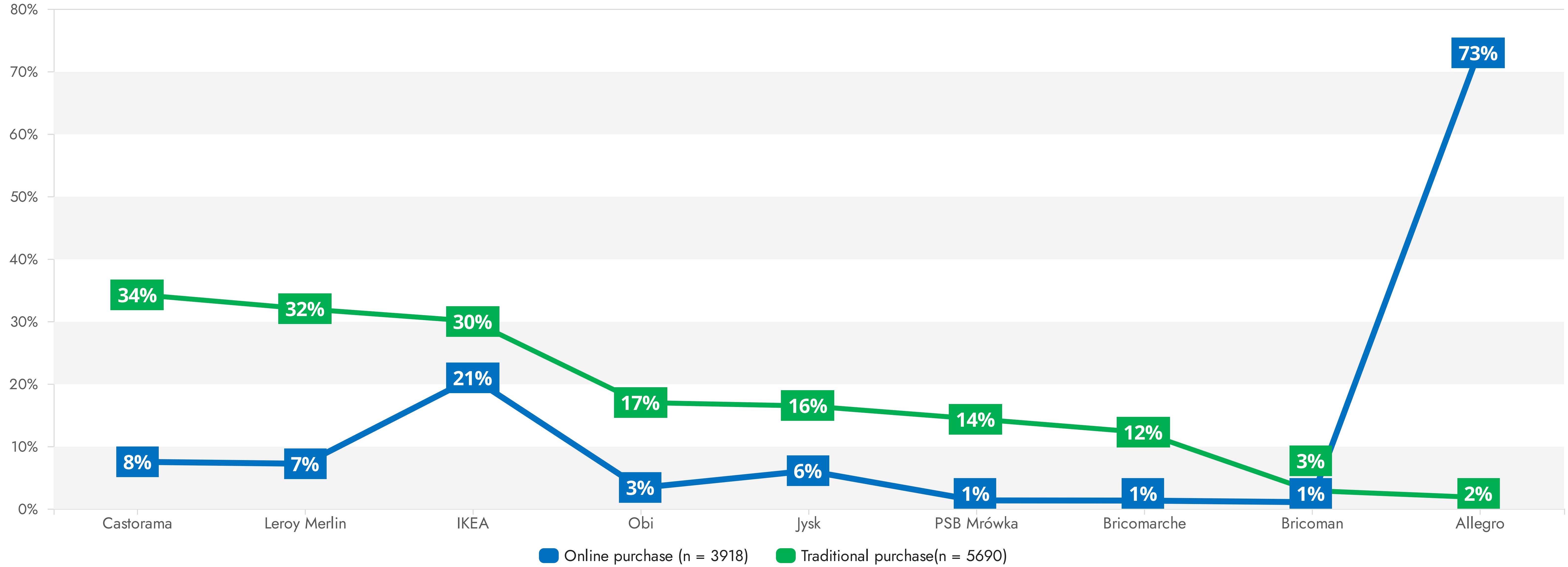


It is difficult to identify a clear leader in this sector. Respondents most often say they purchase home, garden and DIY equipment from Allegro, followed by Ikea, Castorama and Leroy Merlin. Other brands did not exceed 15% of respondents' indications. The results are aggregated for all shopping channels (online and traditional shopping combined).

WHERE HAVE YOU RECENTLY PURCHASED ITEMS FOR THE HOME, GARDEN, DIY?

Market shares by purchase channel

n online purchase = 3918, stationary purchase = 5690

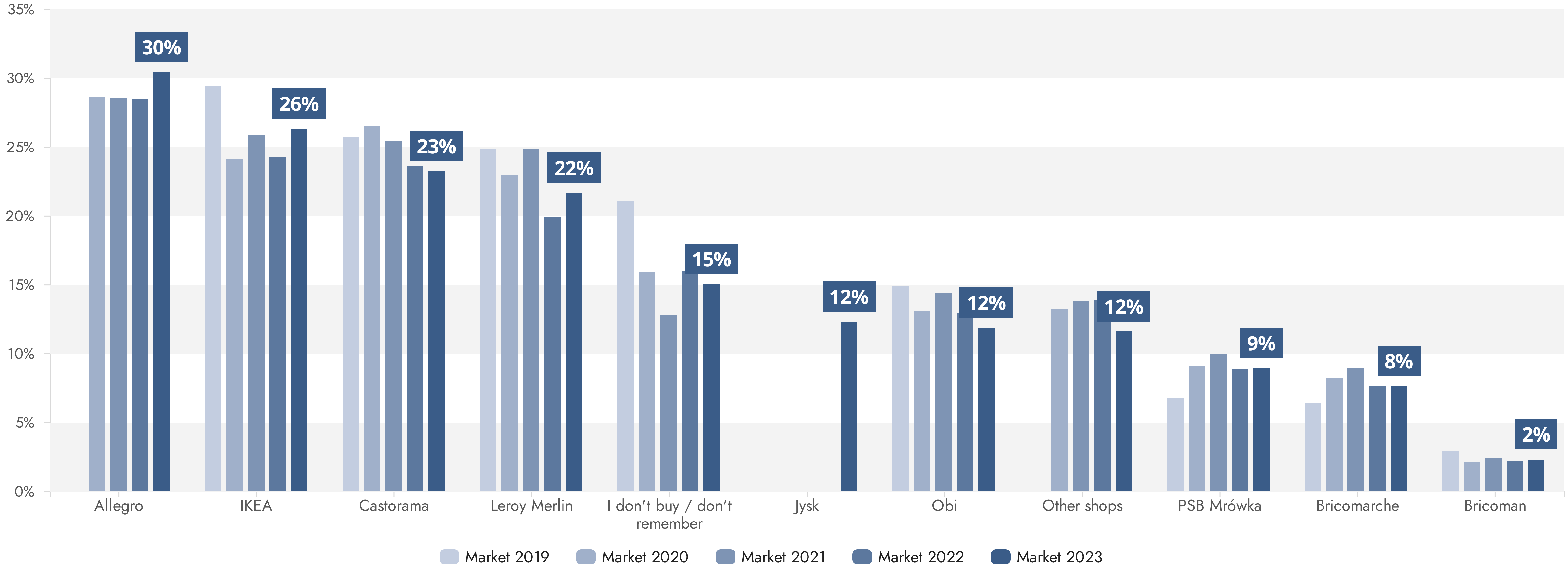


Respondents buying home and garden equipment are more likely to choose to shop in stationary stores. In the online channel, Allegro is the clear leader, while in traditional sales Castorama, Leroy Merlin and Ikea are in the lead.

WHERE HAVE YOU RECENTLY PURCHASED ITEMS FOR THE HOME, GARDEN, DIY?

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

n 2019 = 6795, 2020 = 8822, 2021 = 13529, 2022 = 12546, 2023 = 11015

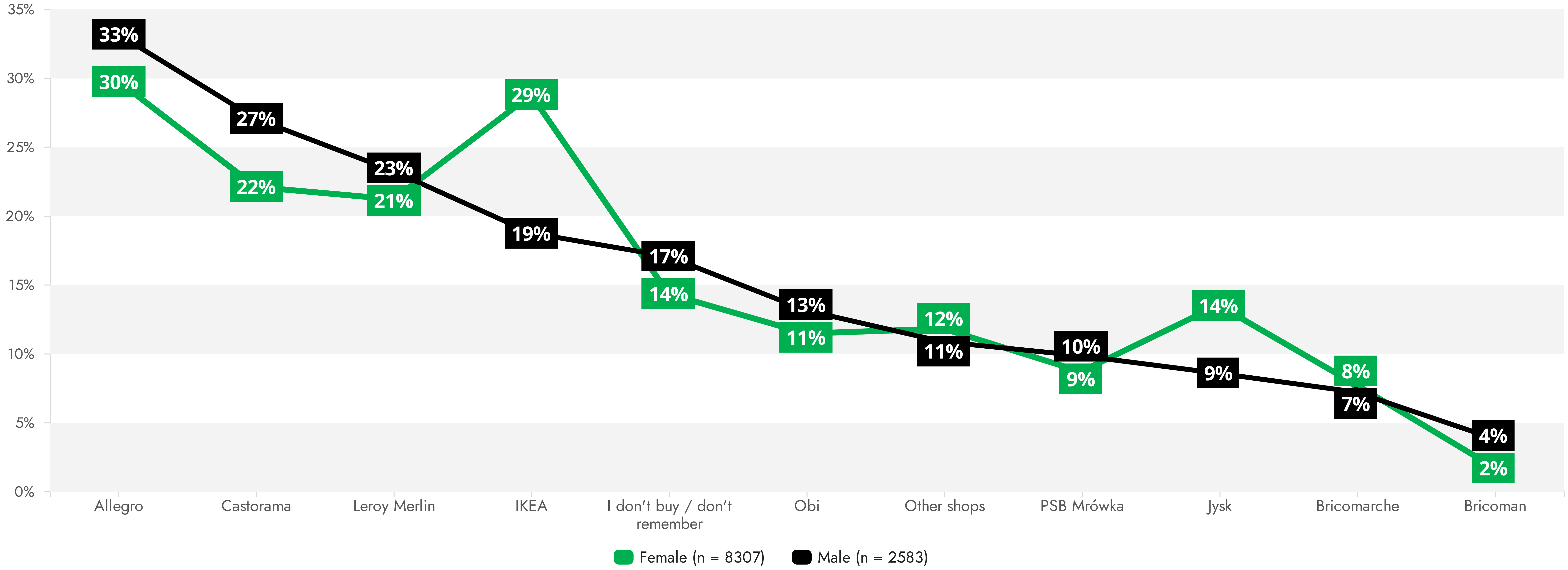


Comparing the results of Omnichannel 2023 with last year's survey, we see an increase in the share of purchases in most of the surveyed stores, the exceptions being Castorama and Obi. It is worth noting that the share of non-buyers of the products in question has dropped.

WHERE HAVE YOU RECENTLY PURCHASED ITEMS FOR THE HOME, GARDEN, DIY?

Analysis by gender

n = 10890



Men mainly choose to shop at Allegro, Castorama and Leroy Merlin, while women's declarations indicate that they most often choose to shop at IKEA and Jysk (far more often than men). 17% of men and 14% of women do not buy home, garden or DIY items.

WHERE HAVE YOU RECENTLY PURCHASED ITEMS FOR THE HOME, GARDEN, DIY?

Analysis by gender in 2023 with changes relative to 2022

n 2022 = 12216, 2023 = 10890

	Allegro	Castorama	Leroy Merlin	IKEA	I don't buy / don't remember	Obi	Other shops	PSB Mrówka	Jysk	Bricomarche	Bricoman	Result count
Female	29.7% +2.4pp	22.1% -0.6pp	21.2% +1.7pp	28.8% +1.8pp	14.3% -1.4pp	11.4% -0.7pp	11.8% -1.8pp	8.7% +0.2pp	13.5%	7.7% +0.3pp	1.8% +0.1pp	8307
Male	33.1% -0.5pp	27% -0.6pp	23.2% +2.3pp	18.7% +2.9pp	17% +1pp	13.1% -2.8pp	10.8% -3.9pp	9.8% -0.4pp	8.6%	7.2% -1pp	3.8% +0.6pp	2583

WHERE HAVE YOU RECENTLY PURCHASED ITEMS FOR THE HOME, GARDEN, DIY?

Analysis by province in 2023 with changes relative to 2022

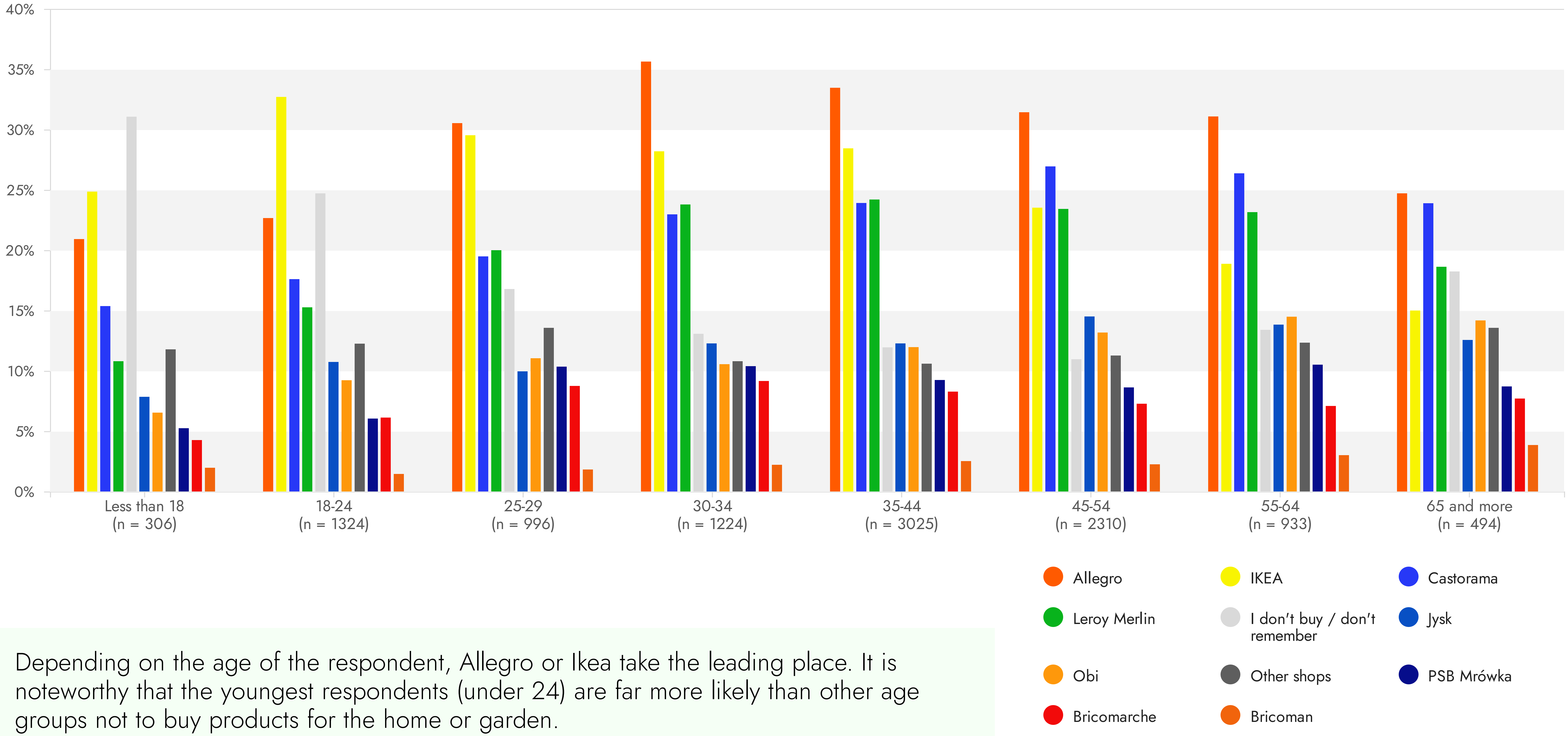
n 2022 = 11501, 2023 = 8674

	Allegro	IKEA	Castorama	Leroy Merlin	I don't buy / don't remember	Jysk	Obi	Other stores	PSB Mrówka	Bricomarche	Bricoman	Result count
województwo mazowieckie	29.7% +2.5pp	30.6% +2.1pp	22.9% +1.8pp	27.9% +2.2pp	14.1% -2.3pp	13.1%	14.1% -1.5pp	12.7% -1.2pp	6.9% -0.5pp	2.8% -0.1pp	3% +0.2pp	1746
województwo śląskie	33% +4.7pp	26.4% +3.8pp	28.8% -0.1pp	19.4% +0.8pp	12.8% -2pp	12.8%	17.3% -2.7pp	10% -2.3pp	3.9%	6.5% +1.8pp	0.9% -0.5pp	1125
województwo wielkopolskie	30.5% +1.8pp	26.3% +1pp	17.6% -3pp	25.4% +1.6pp	15.1% -0.2pp	12.5%	8.3% +0.5pp	10.4% -2pp	8.5% -0.7pp	14.7% +0.1pp	3.1% +0.3pp	974
województwo dolnośląskie	30.9% +0.6pp	25.3% +1.5pp	28.8% +1.9pp	26% +3.1pp	15.8% +1pp	11.6%	8.8% -0.7pp	11.9% -2.4pp	11.2% +0.2pp	9.4% +0.2pp	1.1% +0.4pp	917
województwo małopolskie	30.4% +3.6pp	29.9% +2.5pp	23.2% -4.7pp	19.5% +3.8pp	14.9% +0.6pp	13%	12.9% -0.9pp	12.2% -0.8pp	9.5% -1.2pp	4.5% -0.1pp	1.5% +0.6pp	820
województwo pomorskie	29% -2.2pp	28.1% -1.1pp	21.2% -2pp	21.4% +5.2pp	15.8% +0.4pp	12.4%	15.7% -0.5pp	10.9% -1.1pp	9.5% +0.8pp	7.9% -1.1pp	2.4% -0.4pp	707
województwo łódzkie	35% +6.6pp	25% +0.2pp	22.8% -0.5pp	22.3% +0.9pp	13.3% -1.7pp	12.7%	13.7% -1.3pp	9.2% -3.9pp	8.3% +0.4pp	9% +1.1pp	3.7% +1pp	600
województwo zachodniopomorskie	29.3% -2.8pp	26.8% -1.7pp	27.5% -1.9pp	21.2% +0.6pp	13.8% -0.5pp	11.9%	2.5% -0.9pp	11% -3.3pp	10.3% -2.5pp	12.9% -1.8pp	2.7% -0.4pp	556
województwo kujawsko-pomorskie	30.2% +1.1pp	26.5% +4.8pp	26.9% -1.4pp	20% +1.8pp	14.3%	11.2%	13.5% -1.2pp	9% -3.2pp	8.4% +1pp	8.2% -0.3pp	1% -0.4pp	490
województwo lubelskie	27.5% -2.5pp	28.8% +1.2pp	19.2% +1.7pp	17.4% +1.2pp	15.3% -0.5pp	11.4%	14% +1.1pp	10.1% -4pp	11.4% -2.3pp	5.7% +0.2pp	5.4% +1.6pp	386
województwo podkarpackie	35.1% +6.1pp	19.8% +2.8pp	14.7% -1.8pp	24.4% +3.8pp	13.9% -3.7pp	10.5%	6.8% -5.4pp	12.5% -6.1pp	11% +0.3pp	4.2% -4.2pp	2% +0.2pp	353

WHERE HAVE YOU RECENTLY PURCHASED ITEMS FOR THE HOME, GARDEN, DIY?

Analysis by age

n = 10612

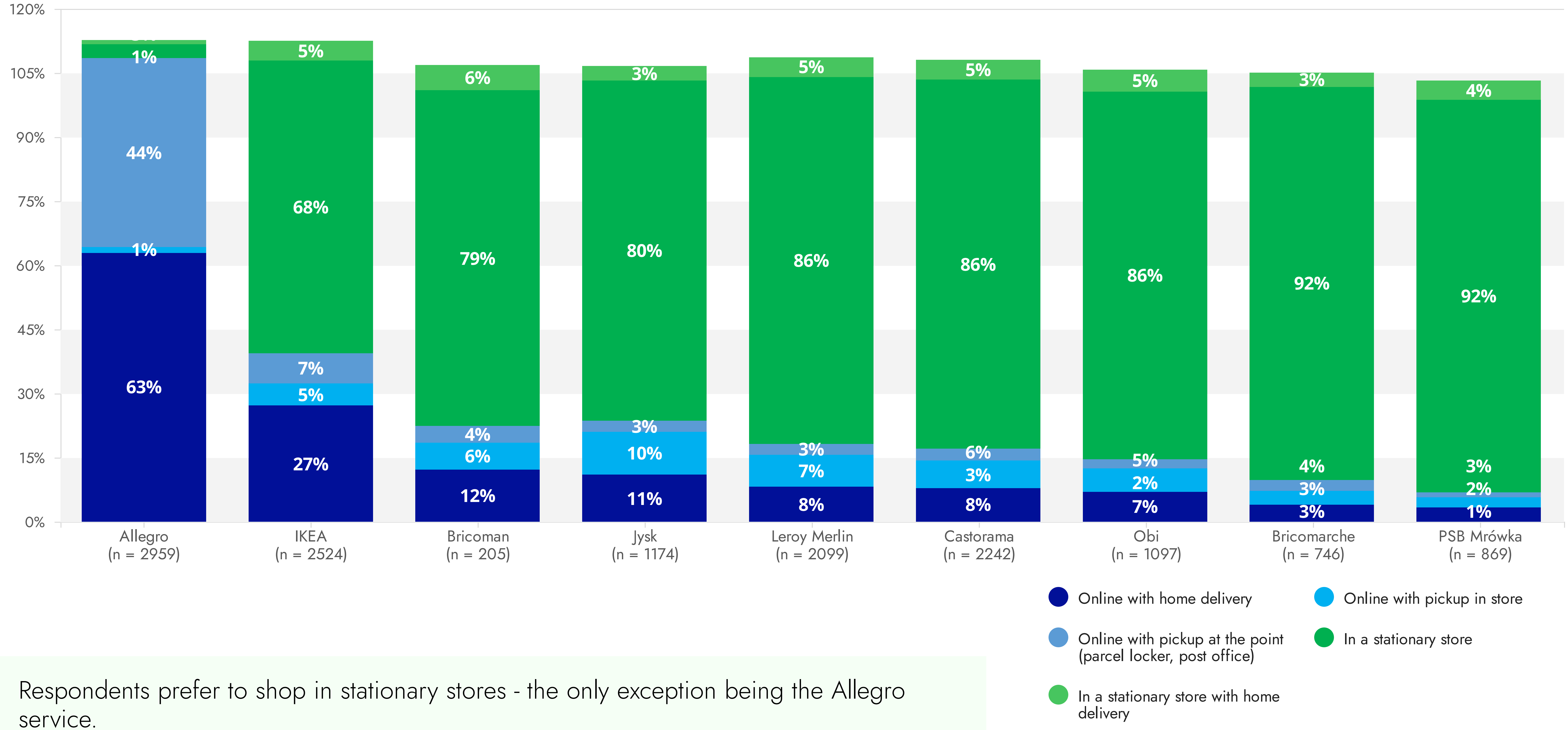


Depending on the age of the respondent, Allegro or Ikea take the leading place. It is noteworthy that the youngest respondents (under 24) are far more likely than other age groups not to buy products for the home or garden.

HOW DID YOU BUY PRODUCTS THERE?

Purchasing channel of choice - multiple choice question

n = 7866



Respondents prefer to shop in stationary stores - the only exception being the Allegro service.

HOW DID YOU BUY PRODUCTS THERE?

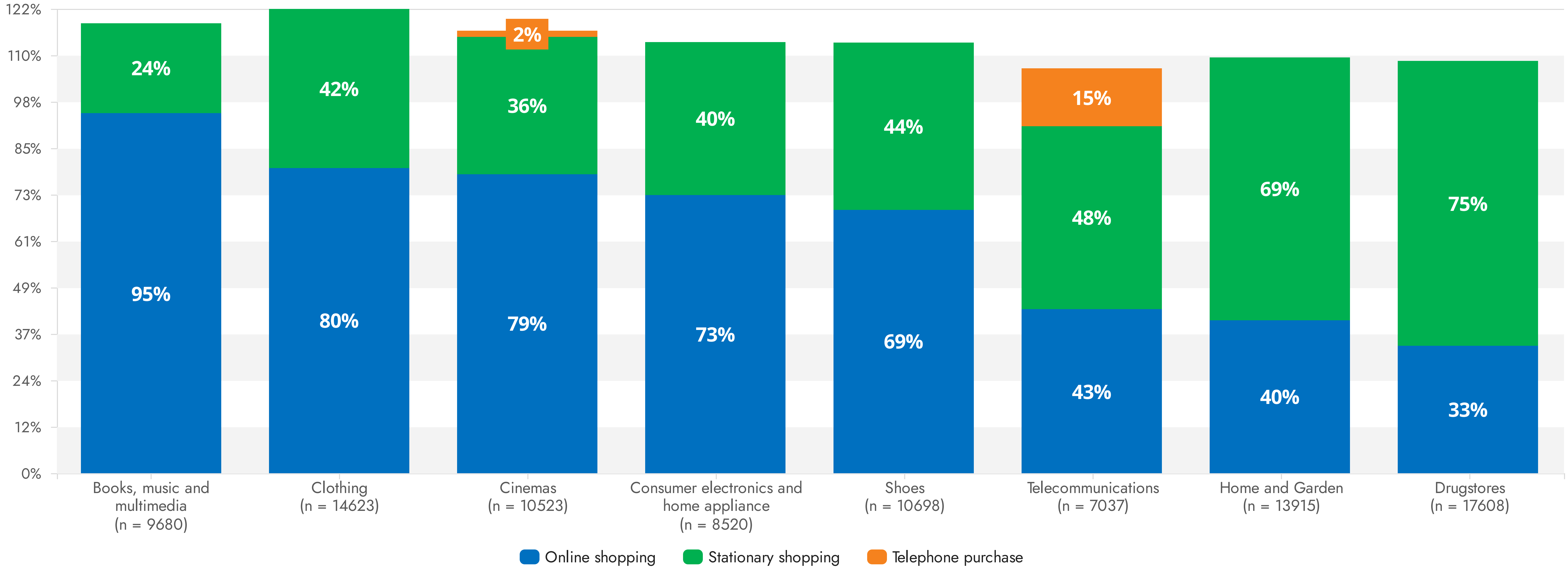
Purchasing channel of choice - Omnichannel 2023 with changes from 2022

n 2022 = 8555, 2023 = 7866

	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
Allegro	62.9% +6.3pp	1.4% +0.6pp	44.2% +4.3pp	3.2% +1.1pp	1% +0.4pp	2959
IKEA	27.2% +6.7pp	5.2% +1.8pp	7.1% +1.7pp	68.5% +1.4pp	4.6% +1pp	2524
Castorama	7.9% +2.5pp	6.4% +1.3pp	2.8% +1.9pp	86.4% +1.5pp	4.6% +0.8pp	2242
Leroy Merlin	8.2% +0.6pp	7.4% +2.3pp	2.6% +1.3pp	85.9% +3.1pp	4.6% +1.4pp	2099
Jysk	11.1%	10%	2.6%	79.6%	3.4%	1174
Obi	7% +1pp	5.5% +0.7pp	2.2% +1.3pp	86% +0.2pp	5.1% +2.6pp	1097
PSB Mrówka	3.3%	2.4% +0.6pp	1.2% +0.6pp	91.8% +1.4pp	4.5% +0.6pp	869
Bricomarche	4% +1pp	3.2% +1.2pp	2.5% +1.3pp	92% +1.8pp	3.4% -0.2pp	746
Bricoman	12.2% +1.4pp	6.3% -0.7pp	3.9% -0.8pp	78.5% +5.7pp	5.9% +1.2pp	205

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

Comparison of channels chosen between industries



Comparing the methods of purchasing home and garden 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

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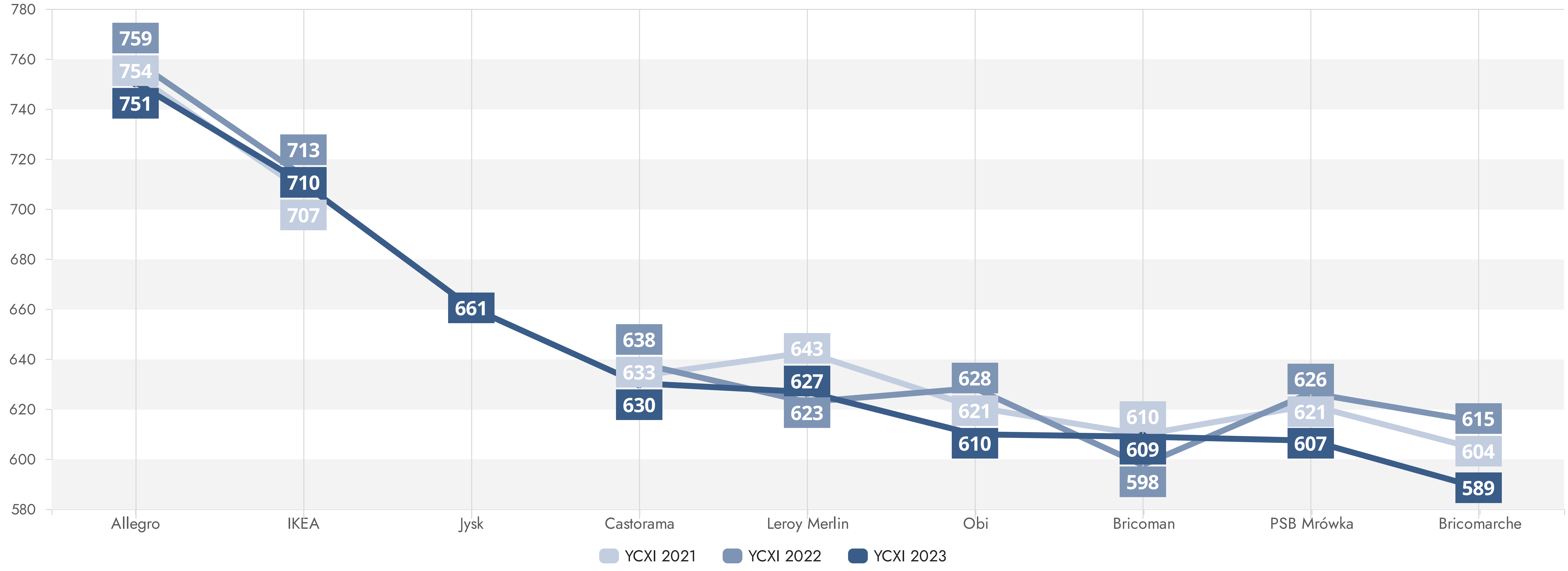
YOUR CUSTOMER EXPERIENCE INDEX

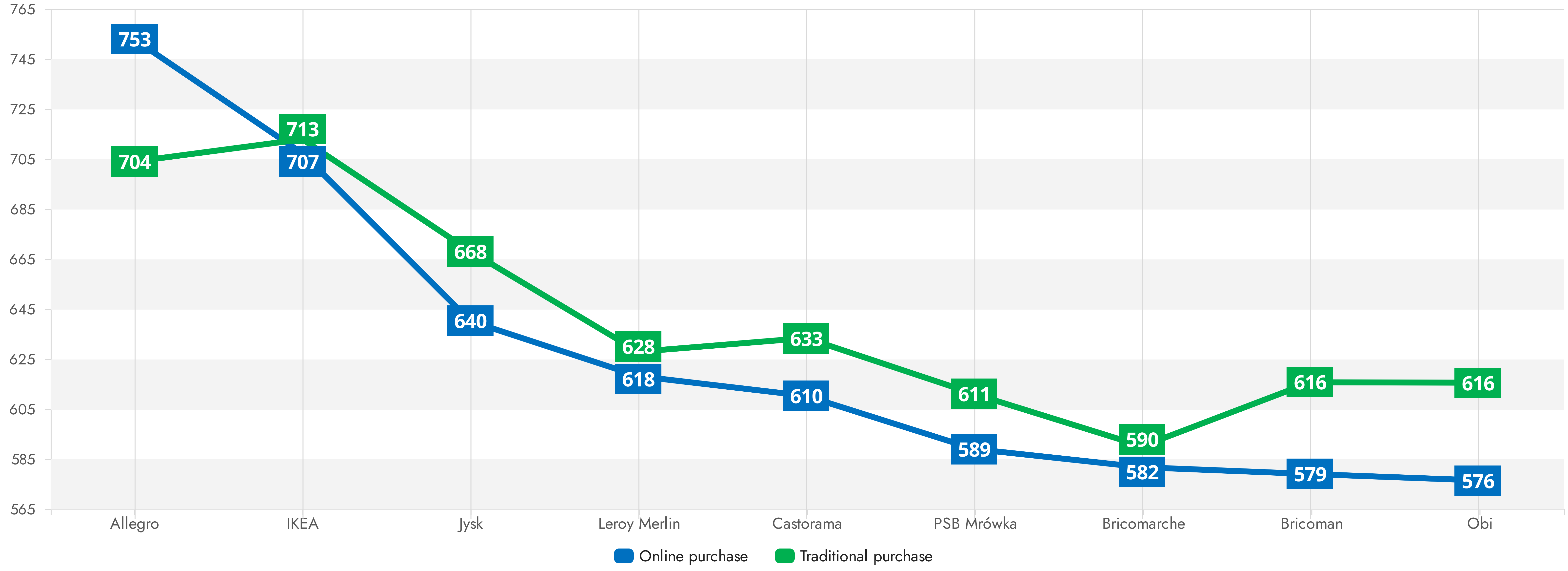
Quality index on a scale of 0 to 1000 taking into account four satisfaction factors:
availability and selection of products, ease of ordering, satisfaction with purchase, willingness to recommend the store to friends



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 two of the companies surveyed scored above 700. The industry leaders are Allegro and IKEA. Compared to last year, we see a decline in the scores of most companies - the exceptions are Leroy Merlin and Bricoman.

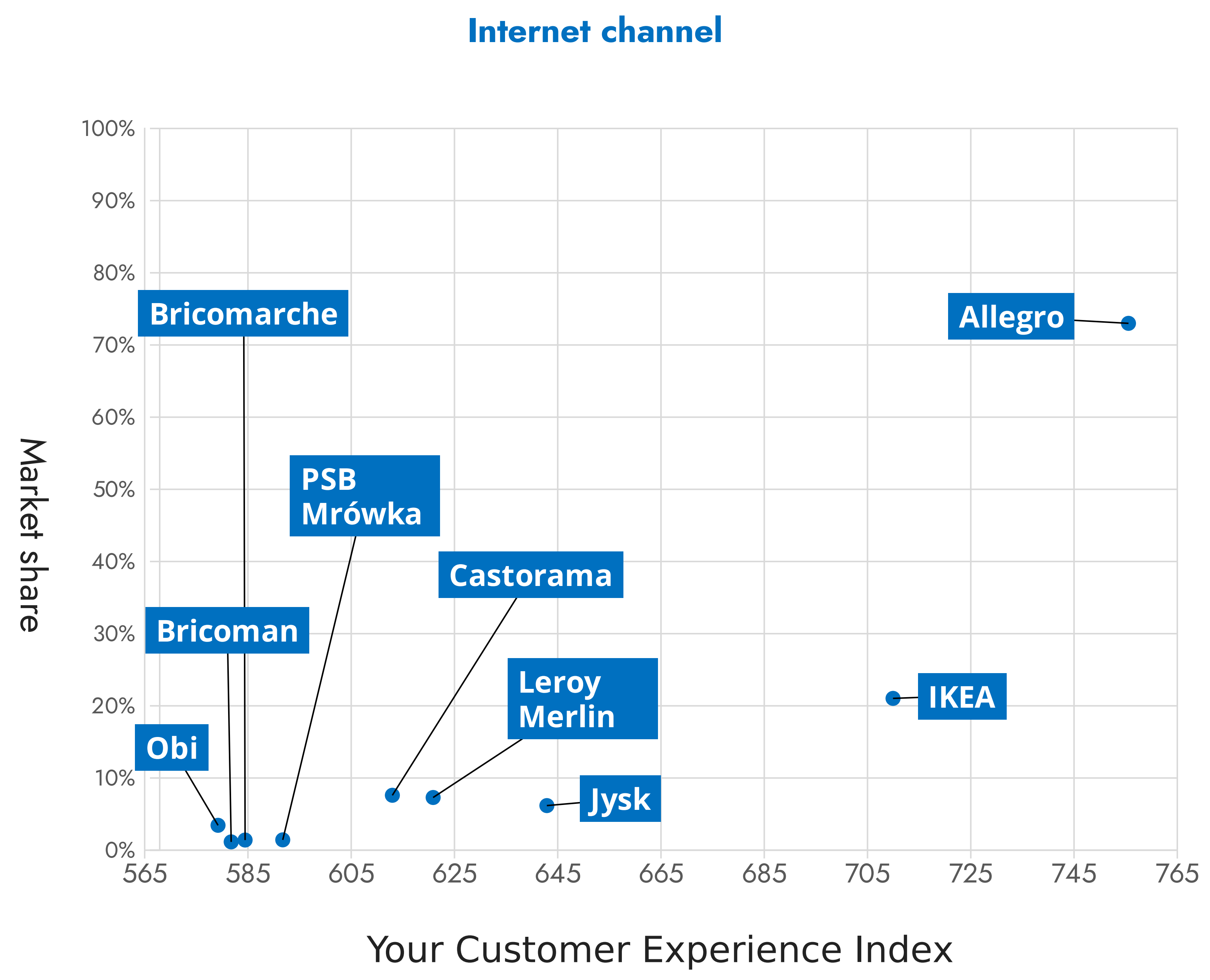
YOUR CUSTOMER EXPERIENCE INDEX

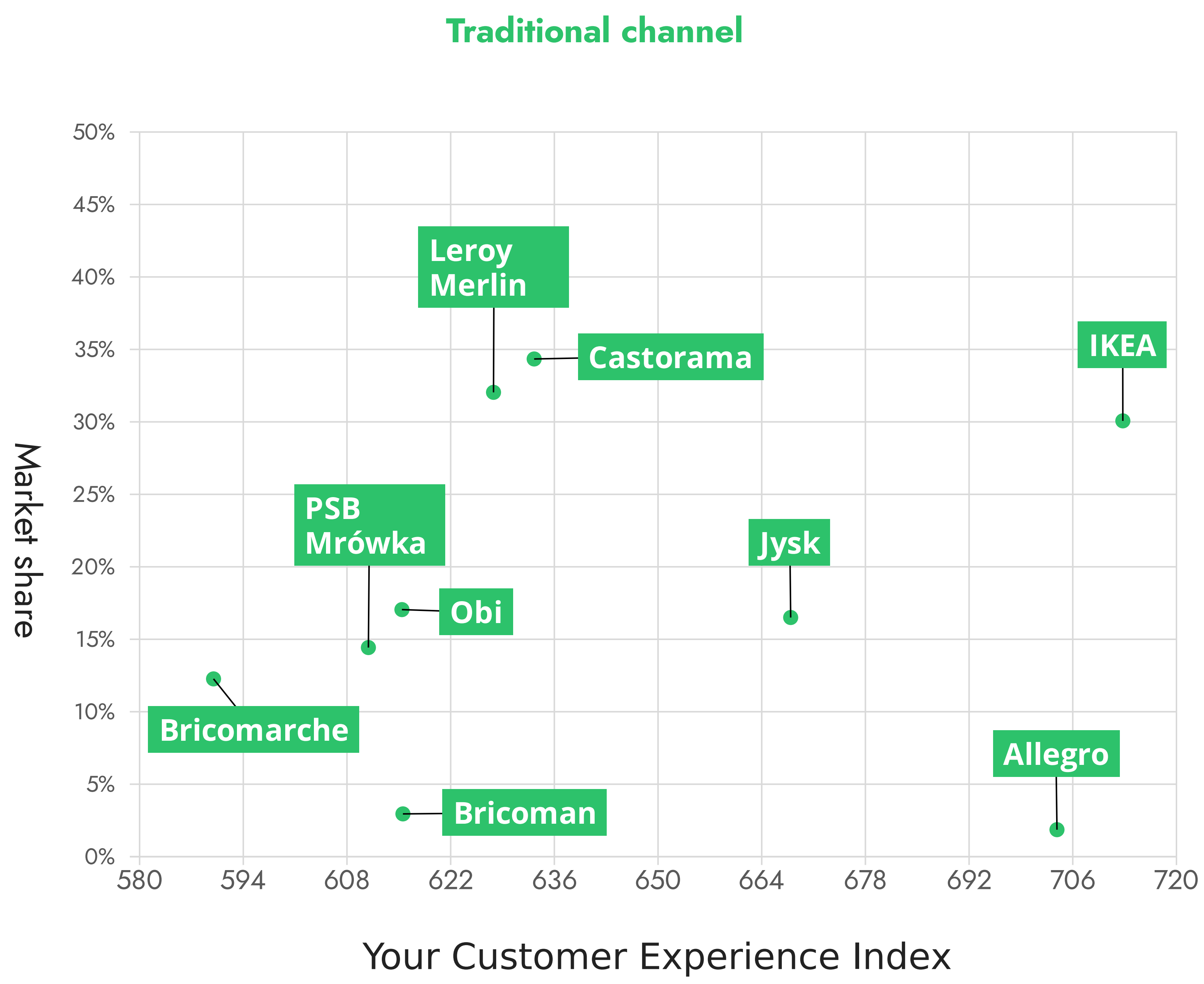
Quality index on a scale of 0 to 1000, broken down by purchasing channel



It is noteworthy that respondents are more positive about the experience of stationary shopping than that of online sales - Allegro being the exception. Allegro boasts the highest quality rating in the online channel, while IKEA boasts the highest quality rating in the traditional sales channel.

YOUR CUSTOMER EXPERIENCE INDEX

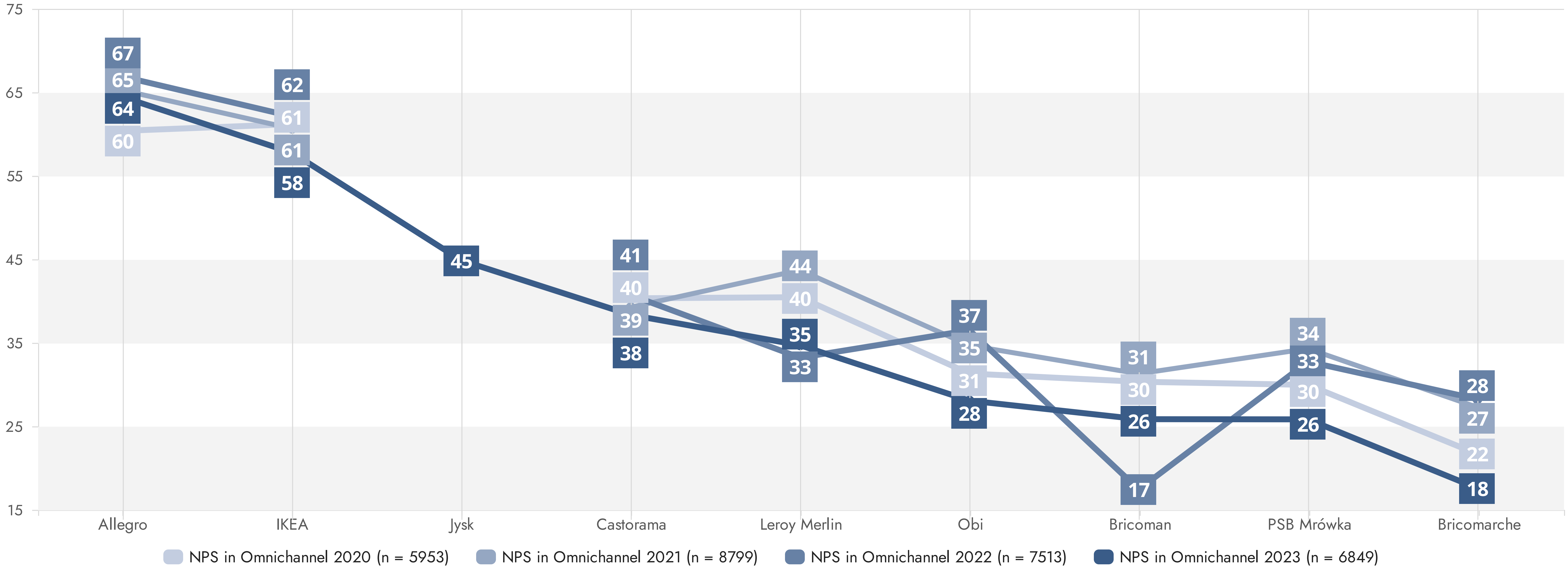




The charts show market shares by sales channel and Your Customer Experience Index value. In the online channel, Allegro dominates with the largest market share and has the highest quality index value. In the stationary channel, Castorama has the largest share, and the leading position in this area of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

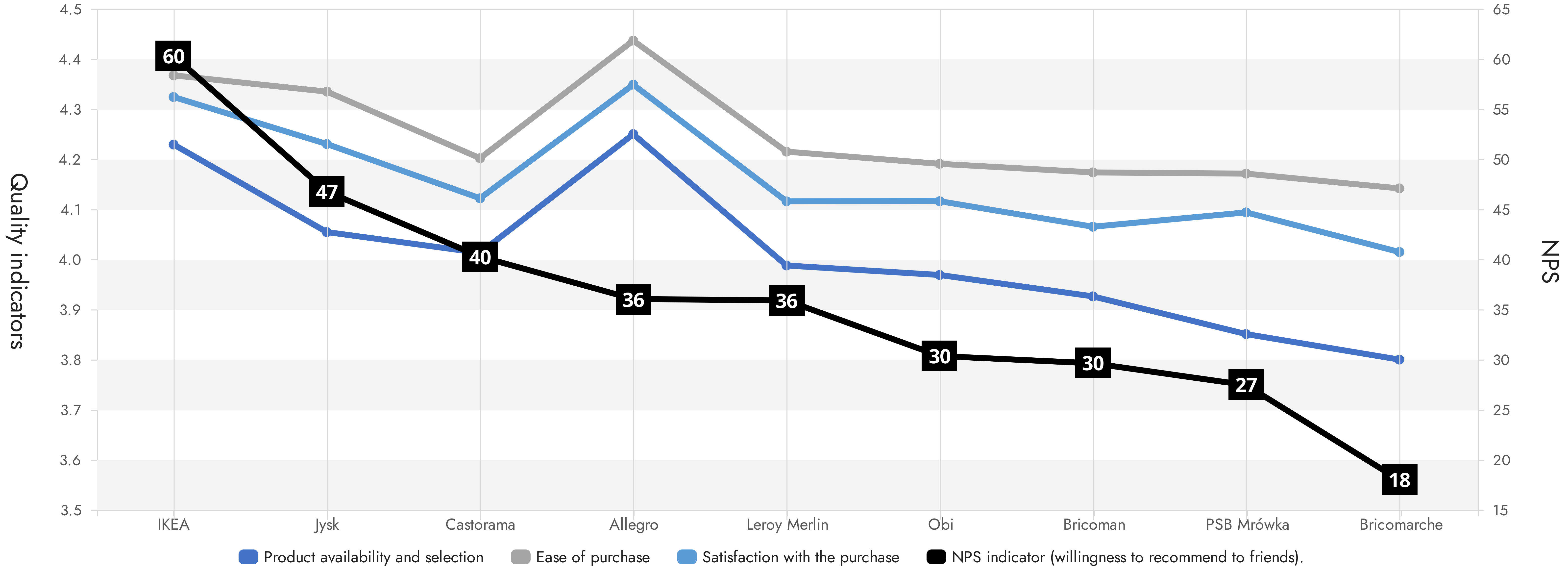
HOW LIKELY ARE YOU TO RECOMMEND THESE STORES TO YOUR FRIENDS?

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



TRADITIONAL CHANNEL - EXPERIENCE QUALITY RATINGS

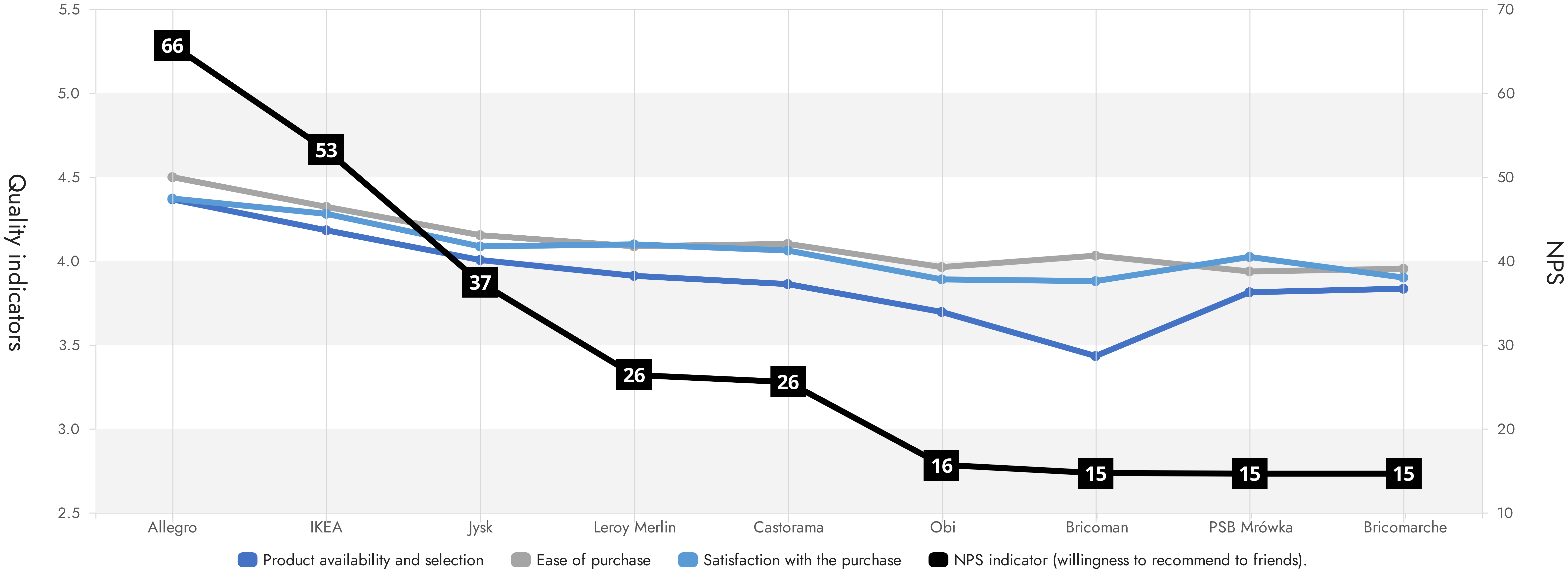
Quality ratings on a scale of 1 to 5 and NPS index on a scale of -100 to 100



The highest NPS index in the traditional channel is recorded for the IKEA store chain. The relationship between the value of the NPS index and the ease of completion and satisfaction with the purchase is evident.

ONLINE CHANNEL - EXPERIENCE QUALITY RATINGS

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



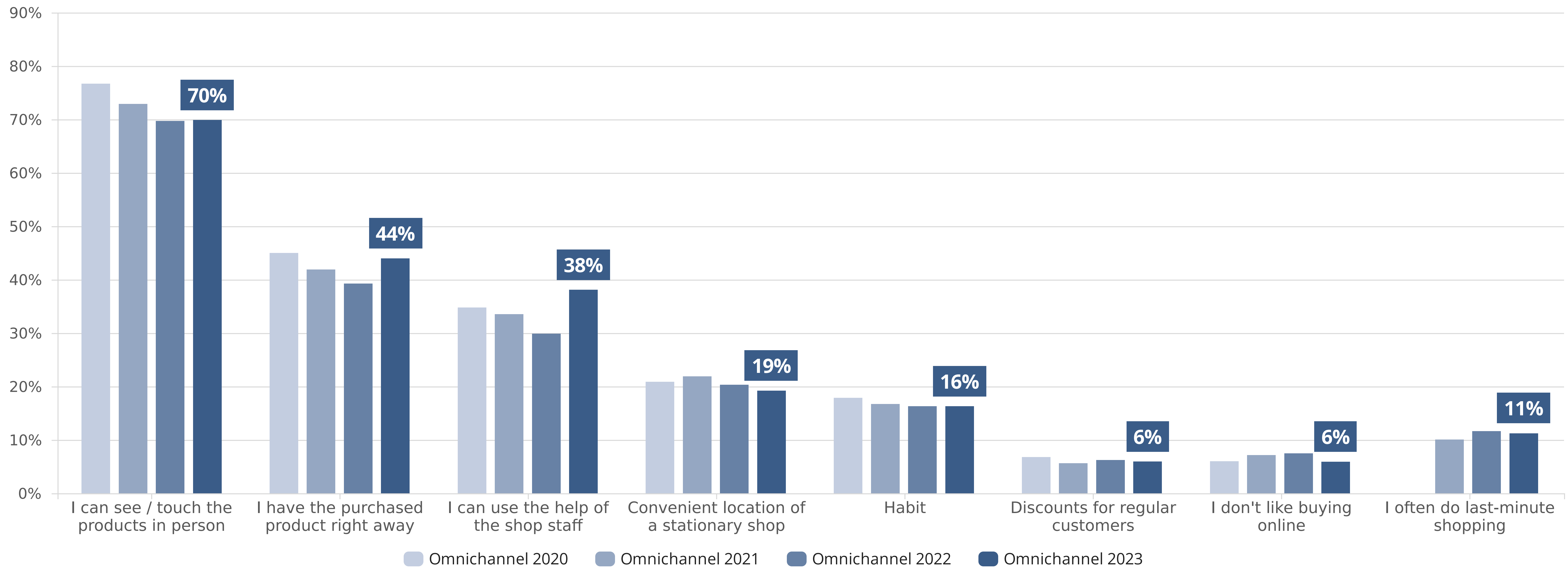
Analyzing individual aspects of the experience against the NPS indicator, we observe the strength of the Allegro brand, where high scores on individual aspects of the experience are correlated with a high likelihood of recommending the brand to friends. A slightly lower score was achieved by IKEA.

SHOPPING PREFERENCES IN THE STATIONARY CHANNEL

WHY DO YOU PREFER SHOPPING FOR HOME, GARDEN, DIY ITEMS IN A STATIONARY STORE?

Traditional channel - Multiple choice question

n 2020 = 3270, 2021 = 4403, 2022 = 3357, 2023 = 2401



WHY DO YOU PREFER SHOPPING FOR HOME, GARDEN, DIY ITEMS IN A STATIONARY STORE?

Traditional channel - Multiple choice question. Co-occurrence of factors in 2023 with changes relative to 2022.

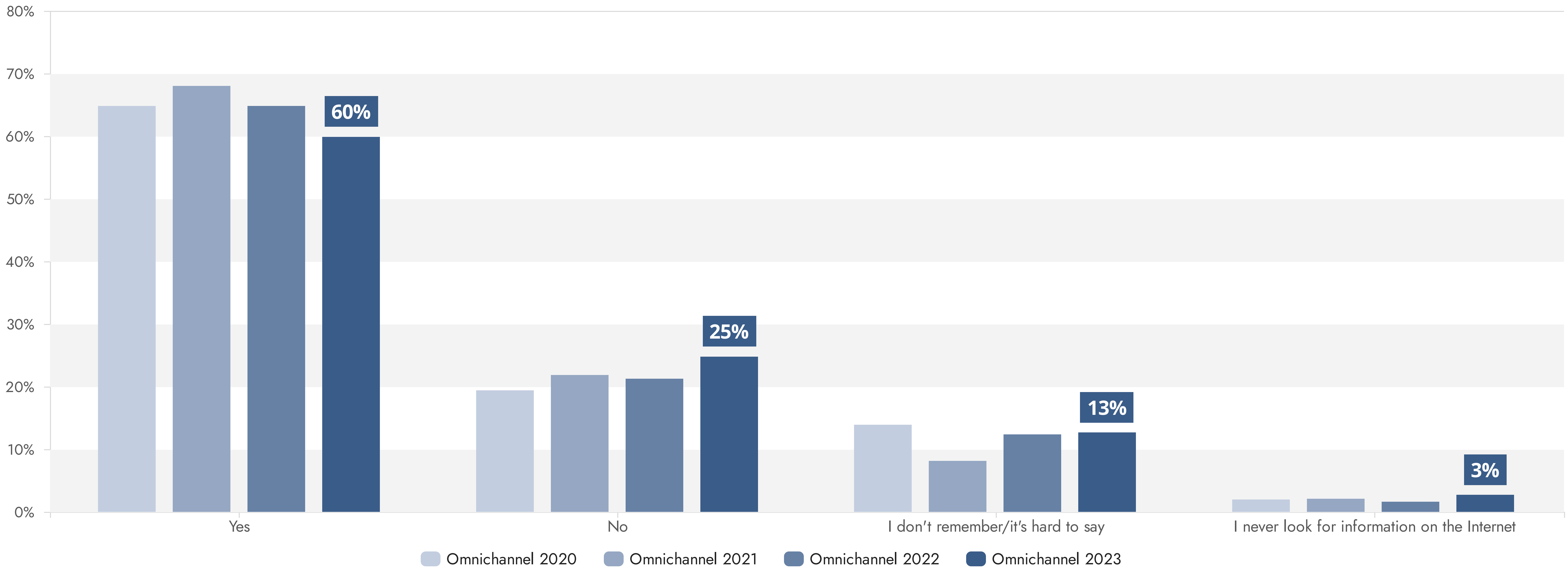
n 2022 = 3357, 2023 = 2401

	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		41.7% +8.6pp	5.1% -0.1pp	47.9% +4pp	20.9% +0.5pp	14.1% +0.2pp	4.3% -1.9pp	10.9%	1678
I can use the help of the shop staff	76.5% -0.8pp		7.7% -1.1pp	56% -2pp	25.2% -4.6pp	15.5% -2.3pp	6.1% -3pp	11.3%	915
Discounts for regular customers	60.6% +2.2pp	49.3% +7.2pp		56.3% +9.9pp	30.3% +5.4pp	26.8% +6.7pp	7% -4.5pp	16.2%	142
I have the purchased product right away	76.1% -1.8pp	48.5% +4.3pp	7.6% +0.2pp		27.6% -0.6pp	18.7% +0.2pp	6.3% -2.7pp	15.2%	1056
Convenient location of a stationary shop	75.9% +6pp	50.1% +6.3pp	9.3% +1.7pp	63.1% +8.7pp		19.7% -0.7pp	6.9% -2pp	18%	461
Habit	60.6% +1.4pp	36.3% +3.6pp	9.7% +2pp	50.4% +5.8pp	23.3% -2.1pp		9.2% +0.4pp	17.9%	391
I don't like buying online	51.1% -7.1pp	39.7% +3.4pp	7.1% -2.5pp	46.8% -0.2pp	22.7% -1.6pp	25.5% +6.4pp		17.7%	141
I often do last-minute shopping	68%	38.3%	8.6%	59.9%	30.9%	26%	9.3%		269

BEFORE YOUR LAST PURCHASE OF GARDEN, HOME, AND DIY ITEMS FROM A STATIONARY STORE, DID YOU LOOK FOR INFORMATION ONLINE?

Traditional channel - Multiple choice question

n 2020 = 3133, 2021 = 3443, 2022 = 2365, 2023 = 1929

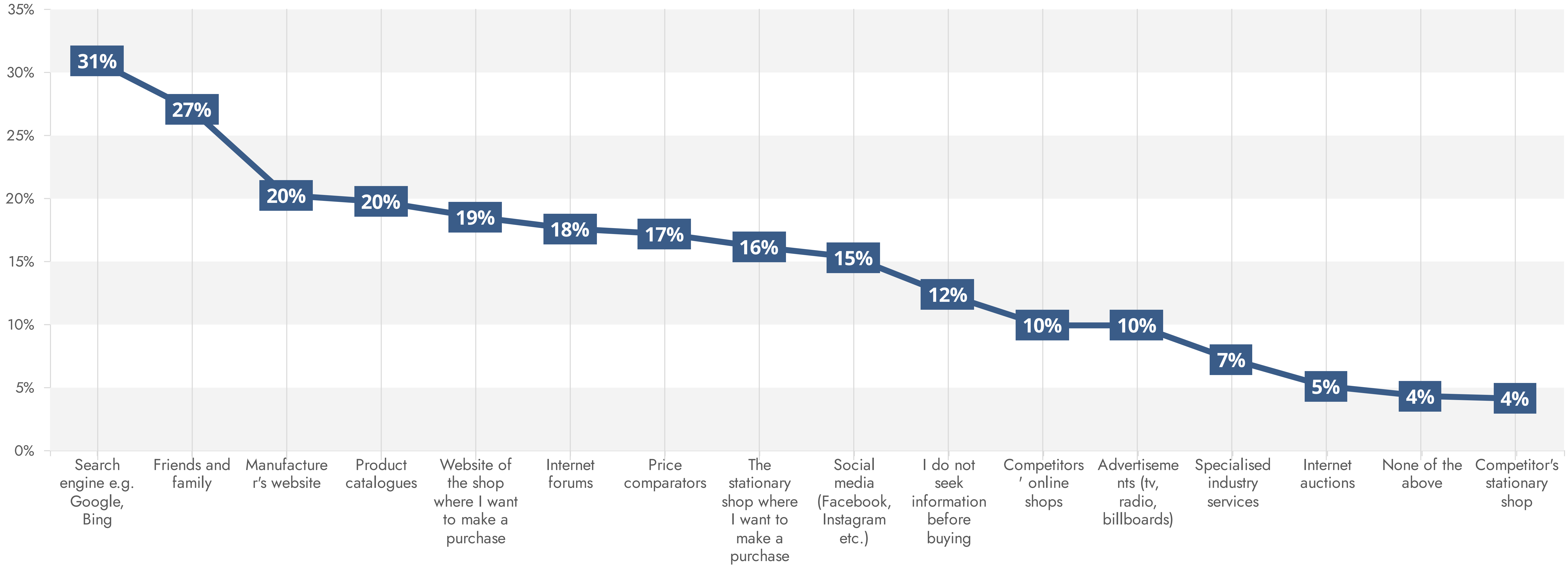


Compared to the previous edition of the survey, we observe a smaller share of people who look online for product information, reviews or product comparisons before making a purchase.

WHERE DO YOU GET INFORMATION ABOUT HOME, GARDEN, DIY ITEMS BEFORE BUYING?

Traditional channel - Multiple choice question

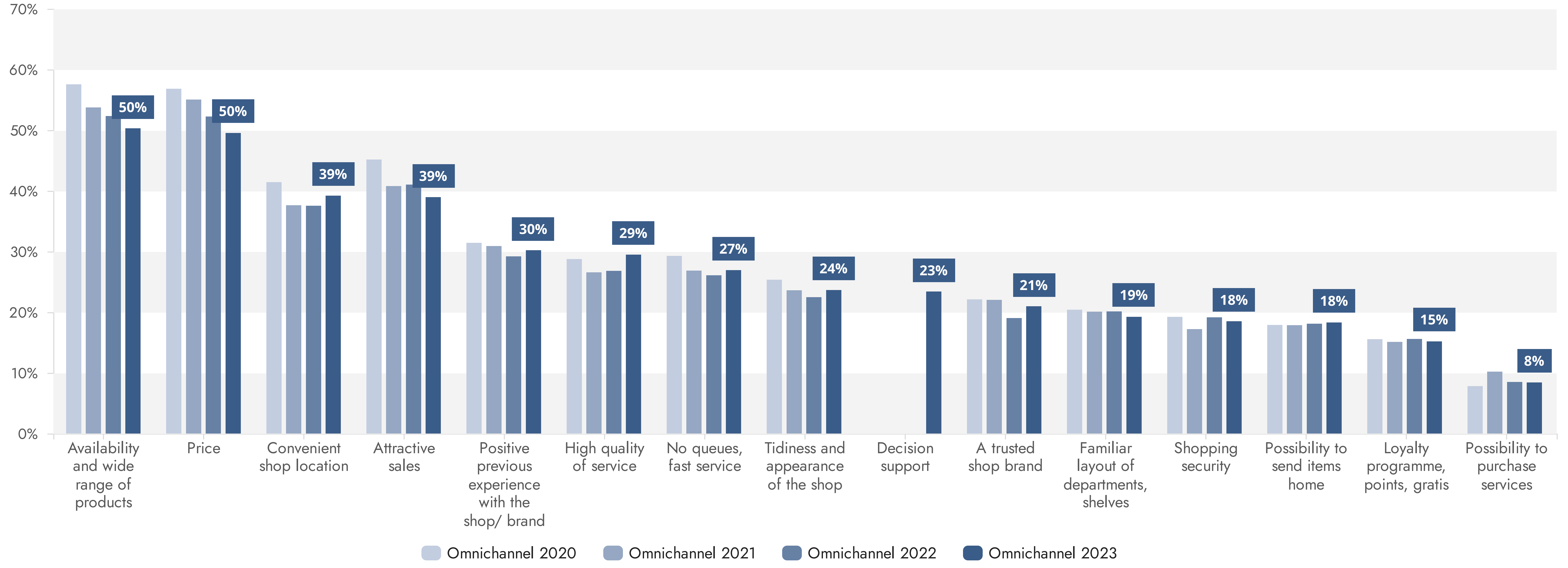
n = 1929



WHAT IS MOST IMPORTANT TO YOU WHEN SHOPPING FOR HOME, GARDEN, AND DIY ITEMS IN A STATIONARY STORE?

Traditional channel - Multiple choice question

n 2020 = 2443, 2021 = 2912, 2022 = 1940, 2023 = 1650

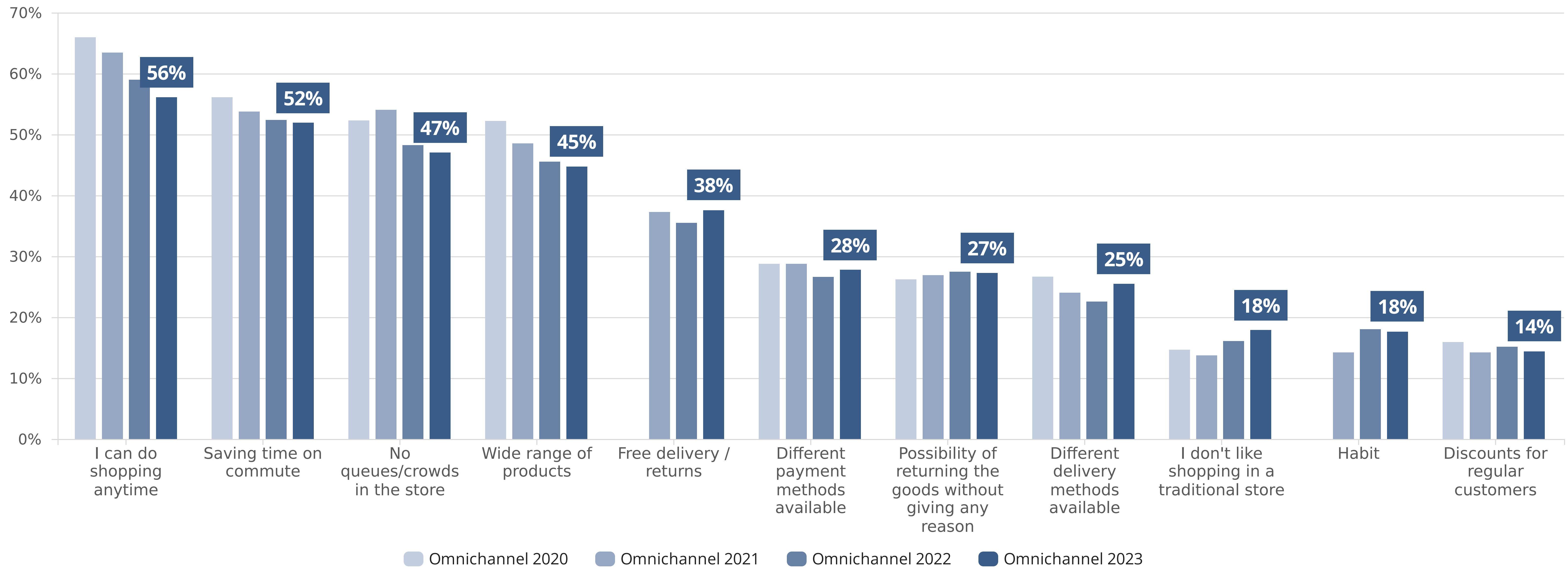


SHOPPING PREFERENCES IN THE ONLINE CHANNEL

WHY DO YOU PREFER SHOPPING FOR HOME, GARDEN, DIY ITEMS AT AN ONLINE STORE?

Internet channel - Multiple choice question

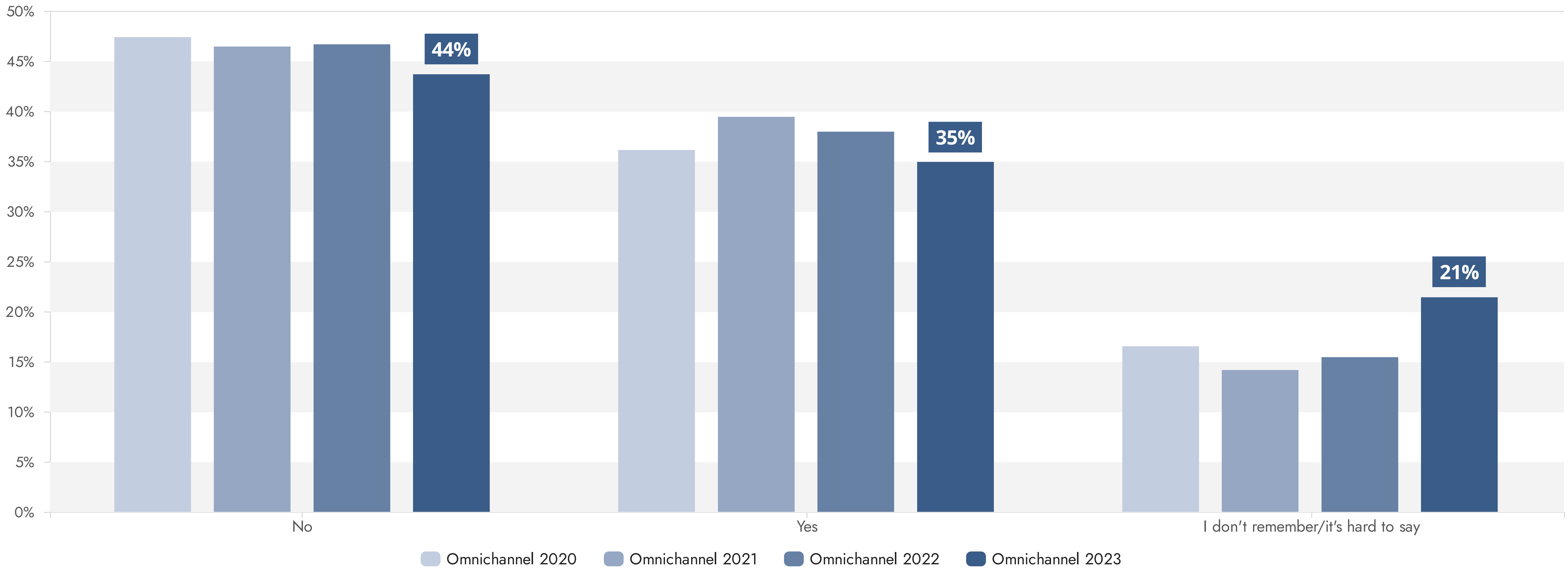
n 2020 = 1100, 2021 = 1429, 2022 = 1362, 2023 = 738



BEFORE YOUR LAST PURCHASE OF HOME, GARDEN, DIY ITEMS ONLINE, DID YOU VISIT STATIONARY STORES TO FAMILIARIZE YOURSELF WITH THE PRODUCT?

Internet channel - Multiple choice question

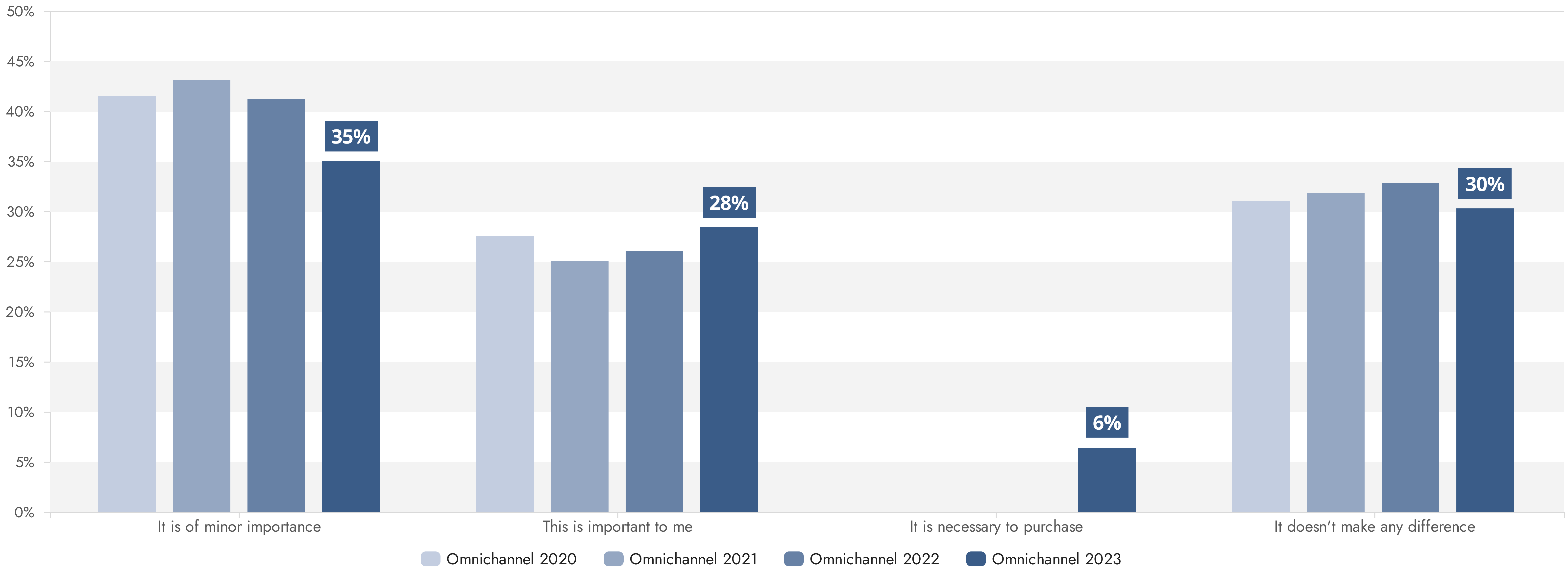
n 2020 = 1368, 2021 = 1598, 2022 = 1400, 2023 = 1065



DO YOU CONSIDER THE PRESENCE OF A BRAND'S STATIONARY STORE IN YOUR AREA WHEN PLANNING ONLINE SHOPPING FOR HOME, GARDEN, AND DIY ITEMS?

Internet channel - Multiple choice question

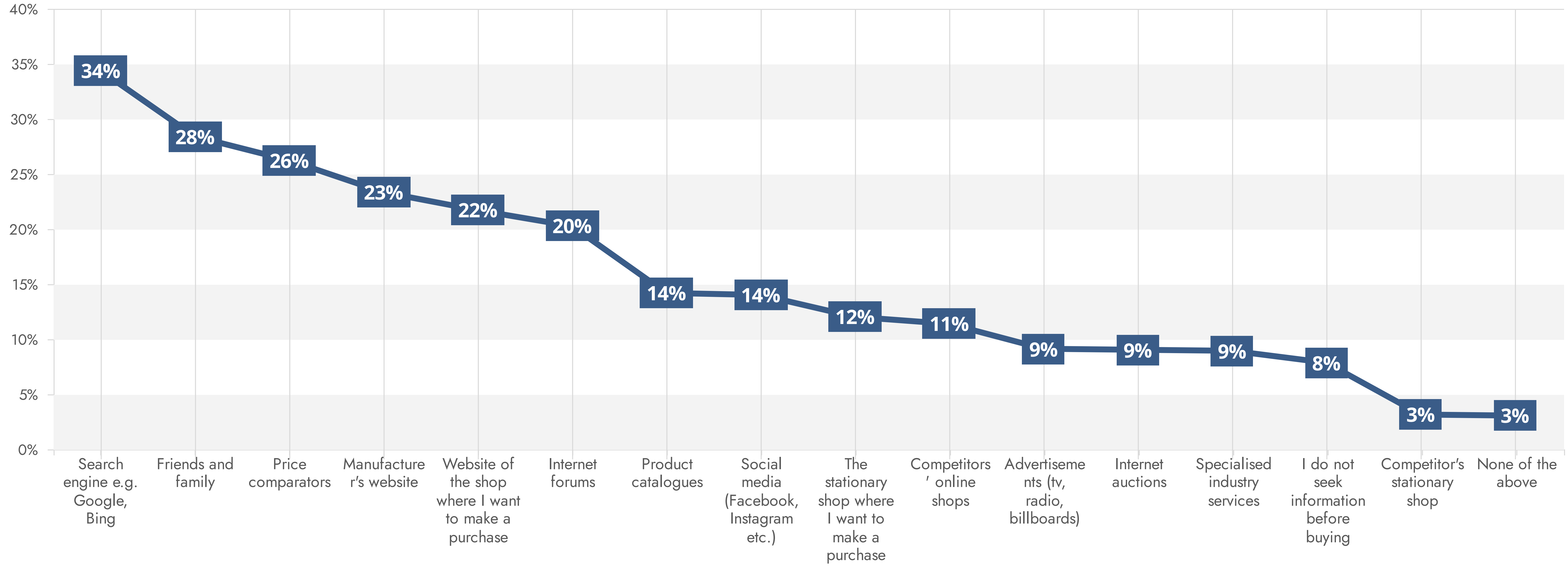
n 2020 = 1310, 2021 = 1568, 2022 = 1336, 2023 = 1004



WHERE DO YOU GET YOUR PRODUCT INFORMATION FROM BEFORE BUYING?

Internet channel - Multiple choice question

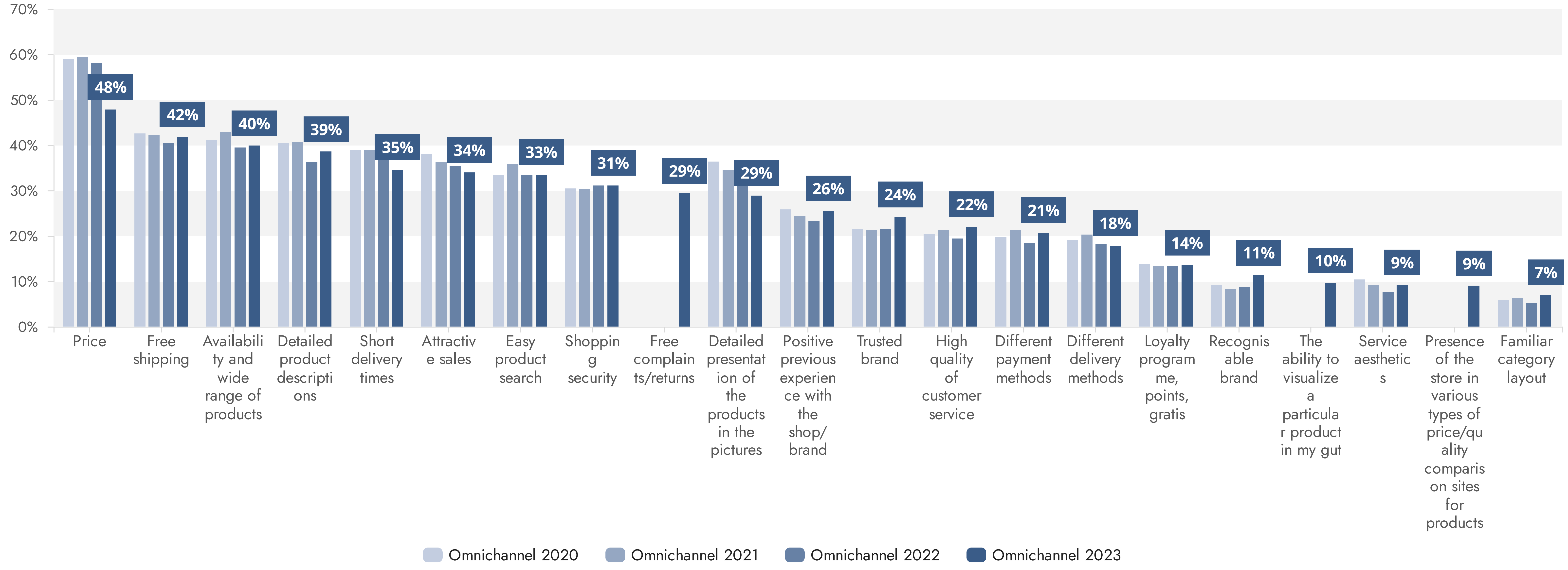
n = 1105



WHAT'S MOST IMPORTANT TO YOU WHEN SHOPPING FOR HOME, GARDEN, AND DIY ITEMS AT AN ONLINE STORE?

Internet channel - Multiple choice question

n 2020 = 1016, 2021 = 1270, 2022 = 1088, 2023 = 1088

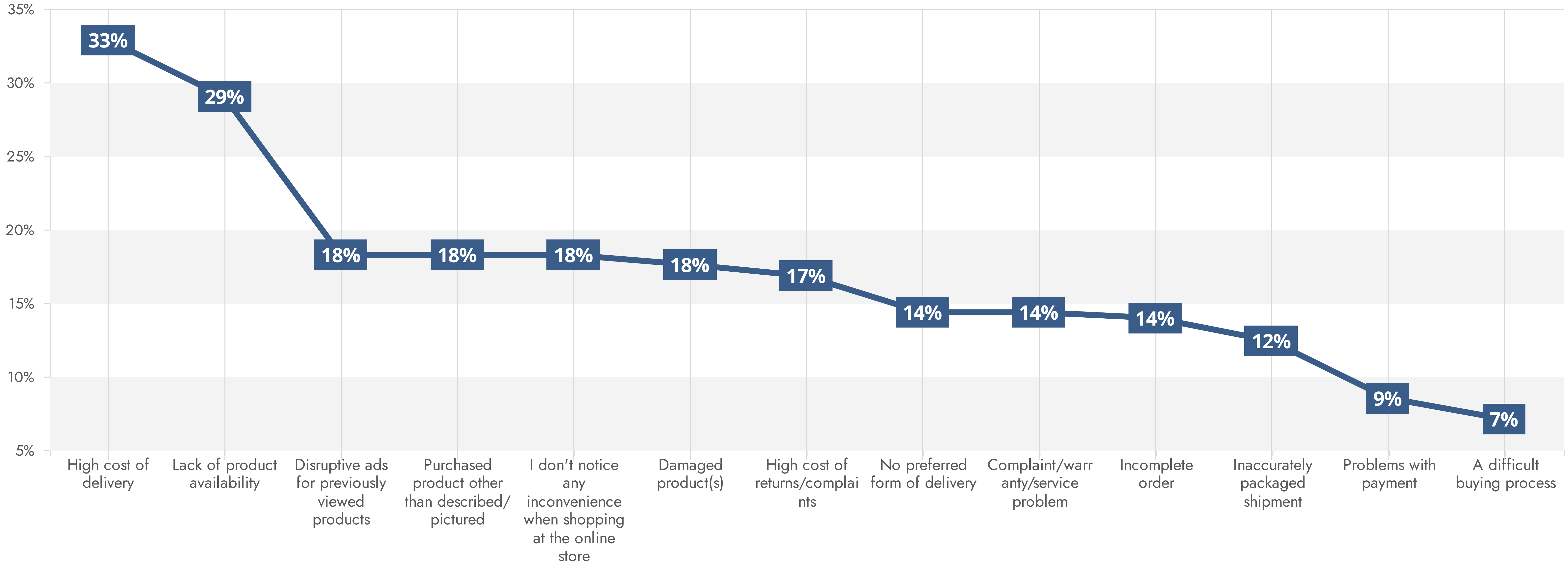


In this year's survey, we see a decline in the share of indications for most response categories or they remain at similar levels. The exceptions are free delivery and detailed product descriptions. Other responses did not gain more than 30% of indications.

WHAT INCONVENIENCES DO YOU ENCOUNTER WHEN SHOPPING FOR HOME, GARDEN, DIY ITEMS IN AN ONLINE STORE?

Internet channel - Multiple choice question

n 2023 = 772

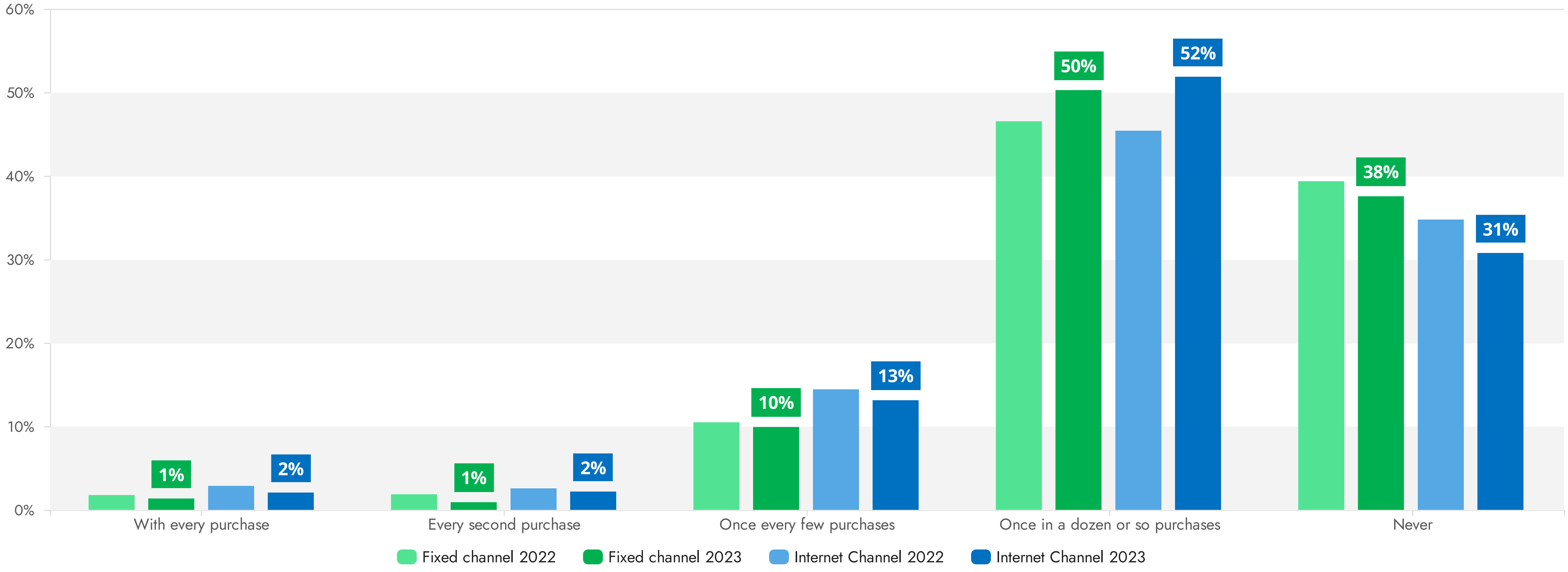


POST-PURCHASE EXPERIENCE

HOW OFTEN DO YOU FIND YOURSELF RETURNING HOME, GARDEN OR DIY ITEMS (COMPLAINT/RETURN/EXCHANGE)?

Single-choice question

n 2022 = 2941, 2023 = 2412

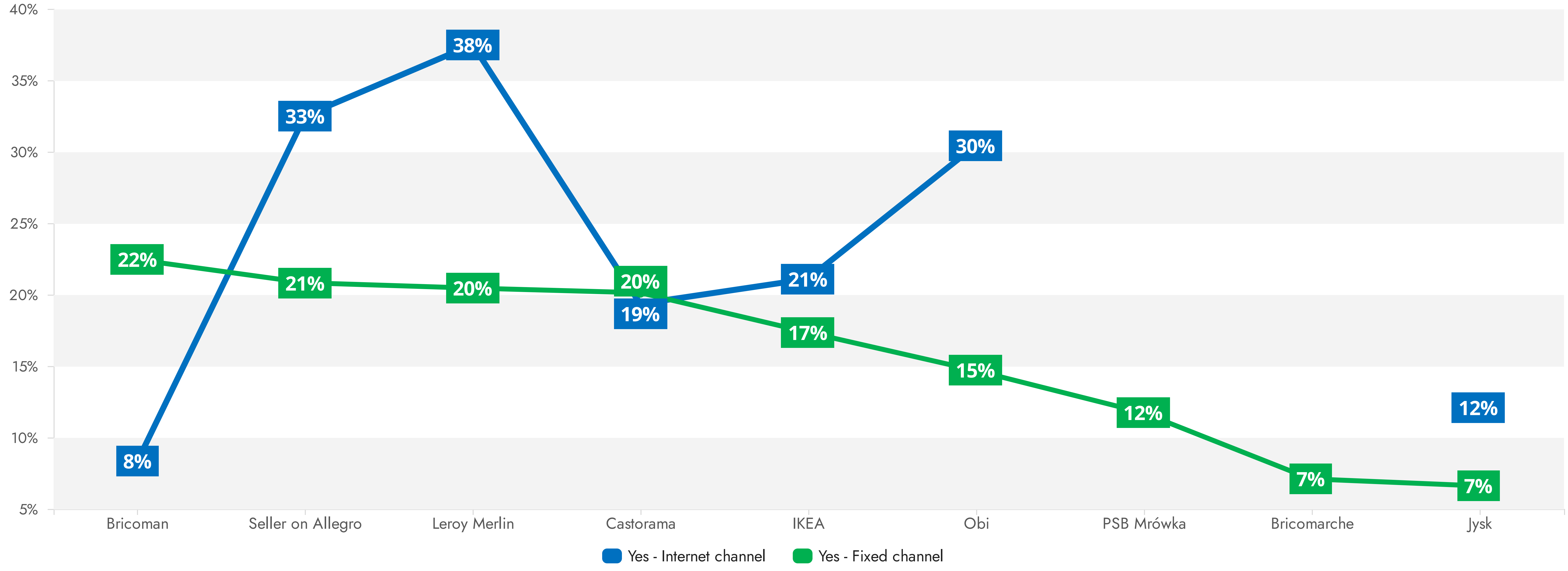


The share of returns of purchased products from the "Home and Garden" industry has similar values in the online channel as in the stationary sales channel. There is a noticeable decline in the share of people who never return products purchased in the online channel.

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

Analysis of customers in contact with Customer Service Offices

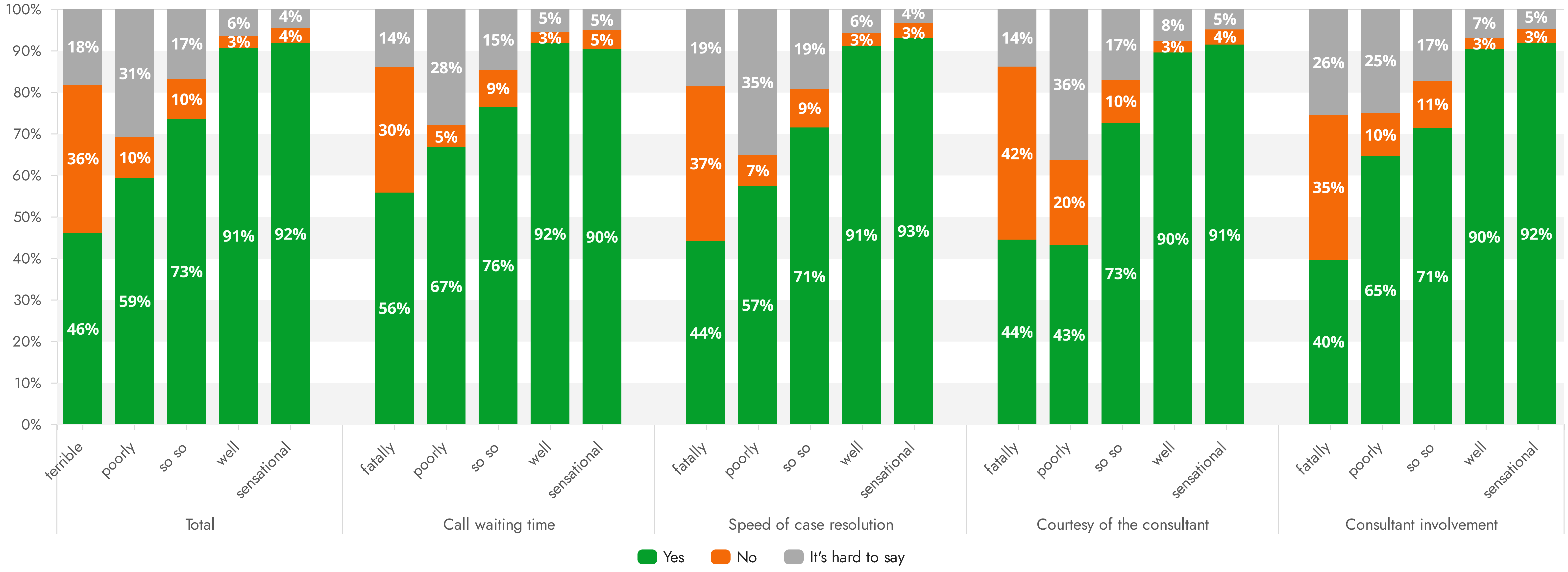
n online store = 1179, n traditional store = 1730



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

Single-choice matrix question

n = 900



A negative rating of a consultant's politeness has the strongest impact (ratings of fatally and poorly) on reluctance to use a brand's offerings again. The strongest influence in the case of a fatal rating is, in turn, the consultant's politeness, the speed of resolving the matter, the consultant's commitment and the 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 thousand

More than 250,000 people completed the survey

10

We examined ten product segments


Cinemas


Clothes

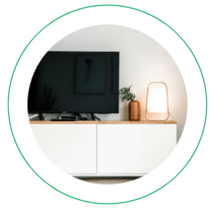

Drugstores


Footwear


Pharmacies


Telecommunicati


Home and garden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