YourCX

REPORT

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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

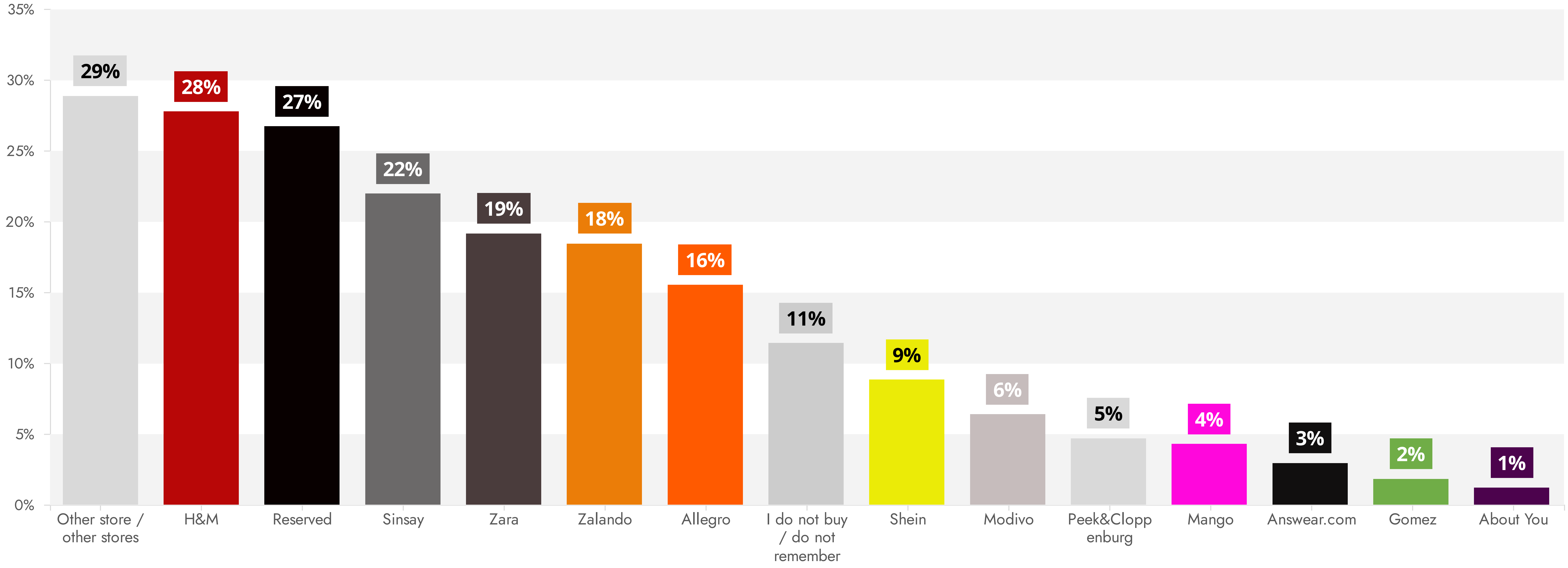
EXAMPLES OF CALCULATIONS FOR COMPANY XYZ

	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 BOUGHT CLOTHES FOR YOURSELF OR YOUR CHILD RECENTLY?

Multiple choice question

n = 10948

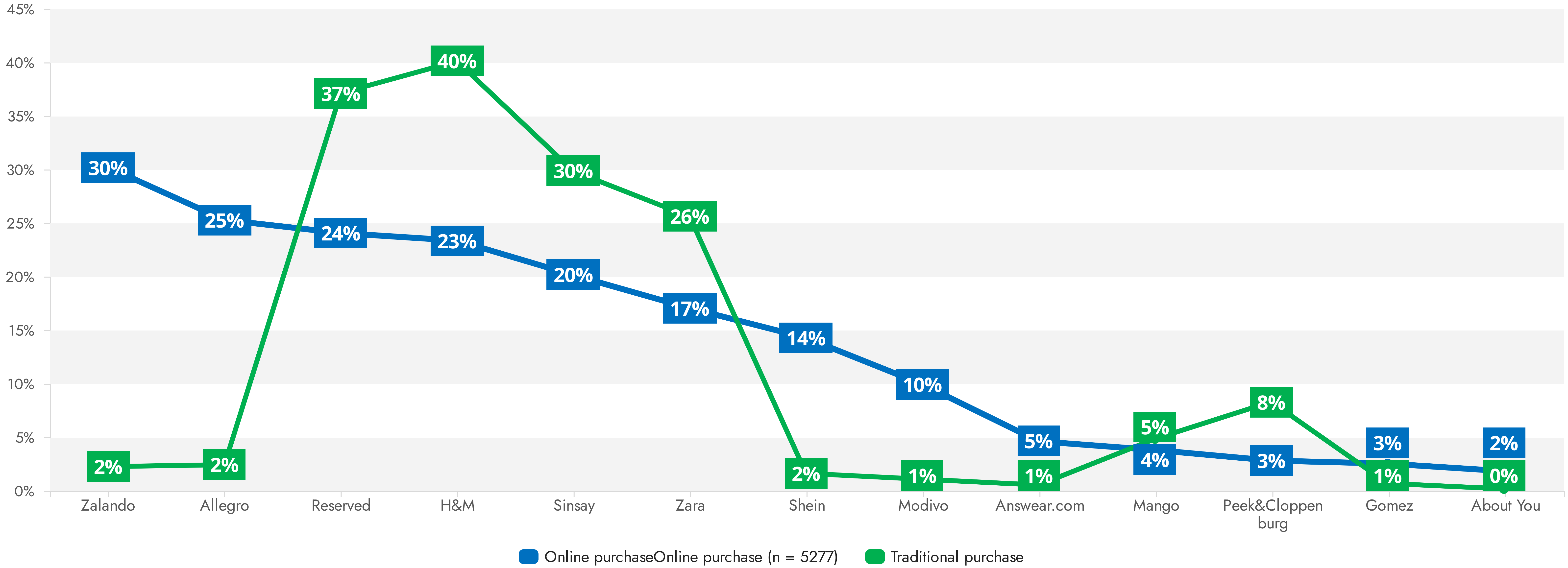


No clear leader can be identified in the apparel industry, as it is widely dispersed. Nearly 30% of respondents buy clothes and accessories from stores not included in the survey. 28% of respondents pointed to H&M, which has an extensive stationary sales network. There were slightly fewer indications for Reserved. The results are aggregated for all shopping channels (online and traditional shopping combined).

WHERE HAVE YOU BOUGHT CLOTHES FOR YOURSELF OR YOUR CHILD RECENTLY?

Market shares by purchase channel

n = 5277 online purchase, 3320 stationary purchase

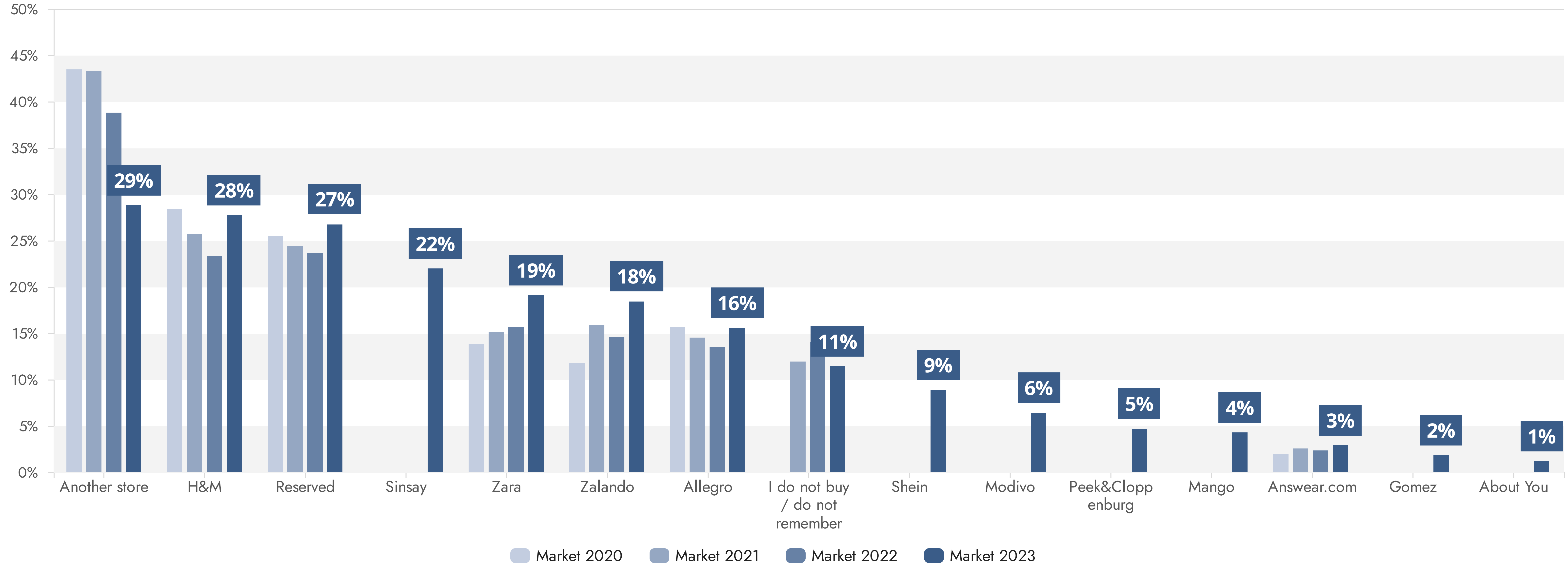


In the online channel, the sales leader is Zalando, where almost one in three people taking part in the survey makes a purchase. In second place we note Allegro. Of the brands surveyed, H&M and Reserved are the leaders in traditional sales.

WHERE HAVE YOU BOUGHT CLOTHES FOR YOURSELF OR YOUR CHILD RECENTLY?

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

n 2020 = 6656, 2021 = 8680, 2022 = 10648, 2023 = 10948

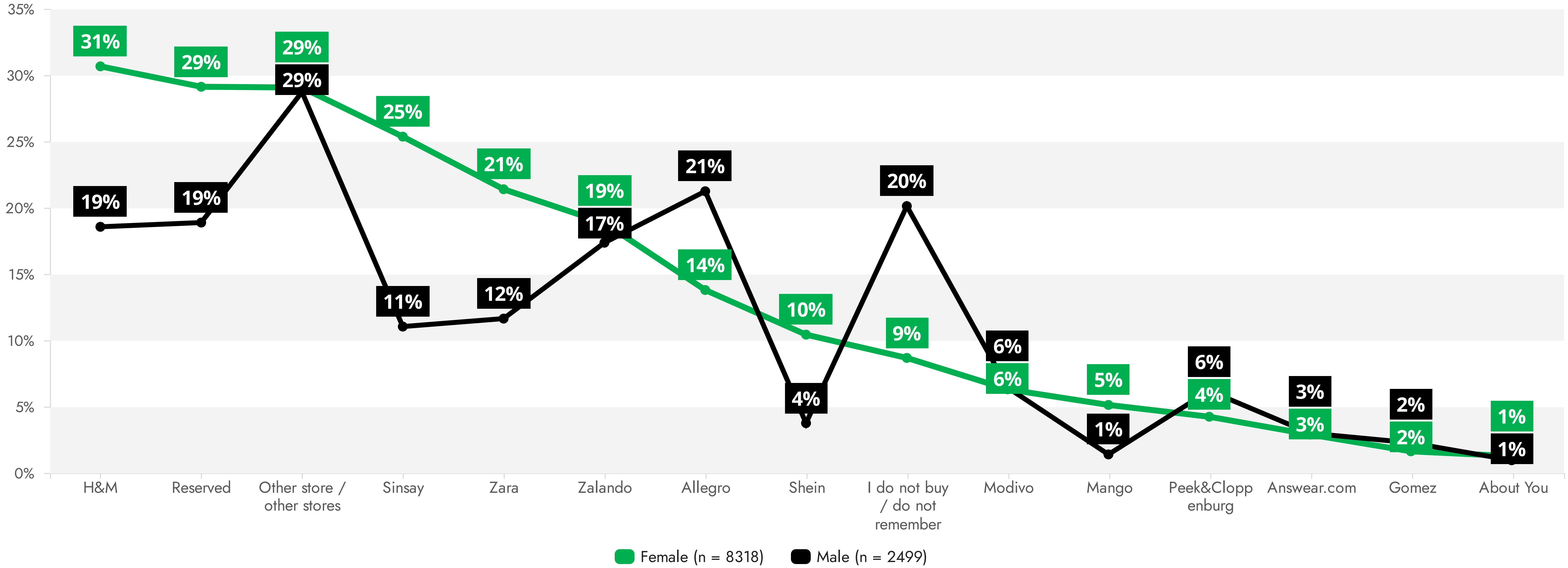


Comparing the Omnichannel 2023 results with last year's survey, we see increases in the share of shopping at most of the chains included in the survey. The apparel market is still very fragmented, but the share of "other stores" fell by 10 p.p. from last year.

WHERE HAVE YOU BOUGHT CLOTHES FOR YOURSELF OR YOUR CHILD RECENTLY?

Analysis by gender

n = 10817



Men buy clothes less often than women - one in five men have not bought clothes recently. Men are more likely to buy clothes on the Allegro platform and at Peek&Cloppenburg than women. Other brands are more often chosen by ladies.

WHERE HAVE YOU BOUGHT CLOTHES FOR YOURSELF OR YOUR CHILD RECENTLY?

Analysis by gender in 2023 with changes relative to 2022

n 2022 = 10384, 2023 = 10817

	H&M	Reserved	Other store / other stores	Sinsay	Zara	Zalando	Allegro	Shein	I do not buy / do not remember	Modivo	Mango	Peek&Cloppenburg	Answear.com	Gomez	About You	Result count
Female	30.7% +3.4pp	29.1% +1.7pp	29.1% -10.8pp	25.4%	21.4% +2.4pp	18.9% +2.6pp	13.8% +1.9pp	10.4%	8.7% -0.9pp	6.3%	5.1%	4.2%	2.9% +0.4pp	1.6%	1.3%	8318
Male	18.6% +4.6pp	18.9% +3.9pp	28.7% -8.6pp	11%	11.6% +3.8pp	17.4% +6.8pp	21.2% +3.2pp	3.8%	20.1% -3.9pp	6.4%	1.4%	6.2%	3% +1.2pp	2.3%	1%	2499

WHERE HAVE YOU BOUGHT CLOTHES FOR YOURSELF OR YOUR CHILD RECENTLY?

Analysis by province in 2023 with changes relative to 2022

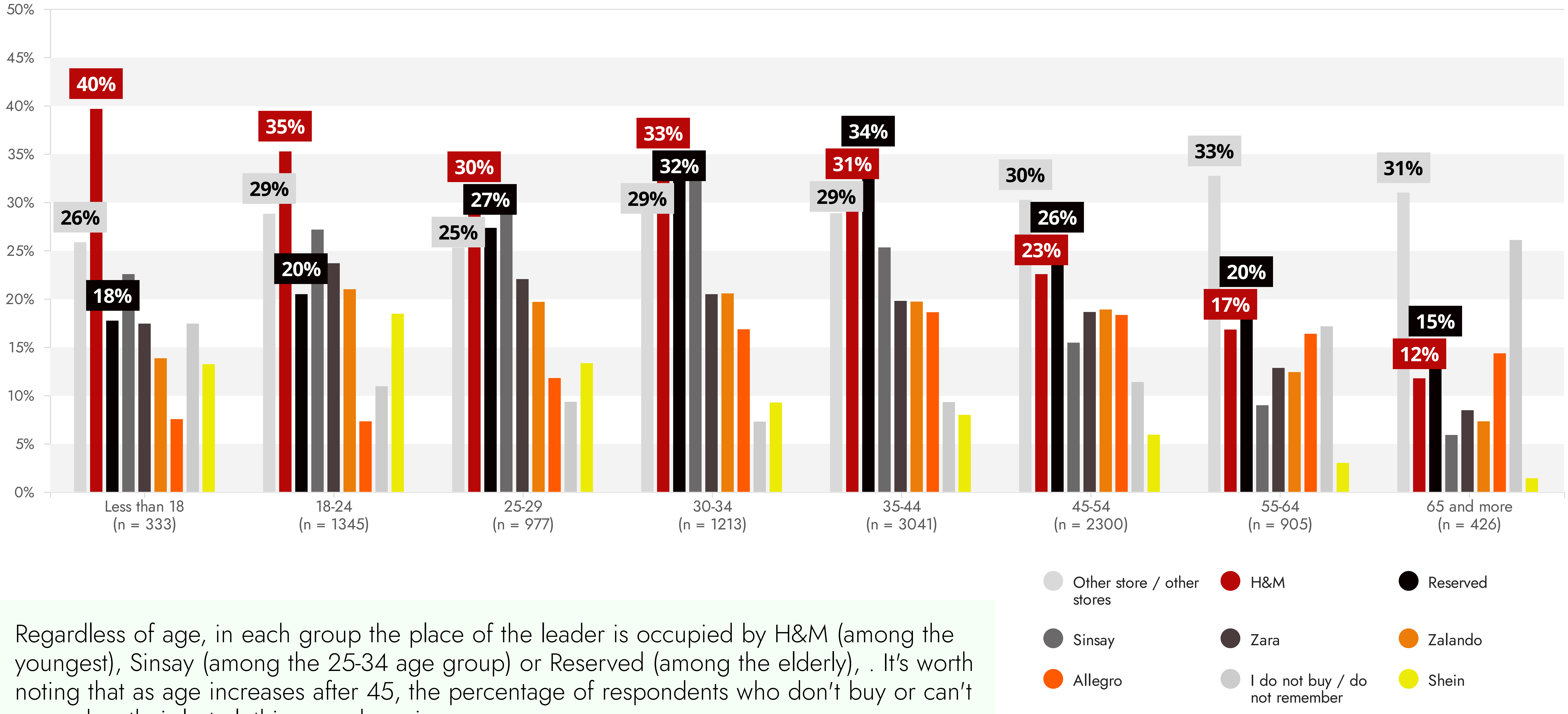
n 2022 = 9692, 2023 = 9960

	Other store / other stores	H&M	Reserved	Zara	Zalando	Sinsay	Allegro	I do not buy / do not remember	Shein	Peek&Cloppenburg	Mango	Modivo	Answear.com	Gomez	About You	Result count
województwo mazowieckie	28.8% -8.8pp	28.1% +2.9pp	24% +1pp	22.4% +3.5pp	20.7% +2.9pp	18%	14.3% +2.3pp	12.2% -2.2pp	7.8%	7.8%	7%	6.9%	3.1% +0.3pp	1.9%	1.5%	1748
województwo śląskie	31.2% -11.9pp	27.6% +5.2pp	28.2% +3.9pp	17.1% +3.2pp	15.6% +4.5pp	22.2%	15.5% +2.6pp	9.9% -3.1pp	9.1%	4.6%	3.8%	5.8%	1.7% +0.4pp	1.2%	0.8%	1101
województwo wielkopolskie	28.8% -9.1pp	29.3% +2.5pp	28.7% +5.3pp	15.8% -0.4pp	19% +3.8pp	25.5%	17.6% +1.7pp	10.8% -1.9pp	7.9%	2%	3.2%	6.7%	2.1% -0.8pp	2.5%	0.8%	992
województwo dolnośląskie	31.4% -10.9pp	28.8% +3.8pp	30.6% +5.9pp	17.1% -0.8pp	19.4% +5.6pp	20.4%	19% +4pp	9.8% -3.1pp	8.6%	5.3%	3.2%	7.8%	3.4% +0.9pp	2.5%	1.4%	844
województwo małopolskie	27.9% -10pp	30.4% +8.1pp	28.8% +4.4pp	21.2% +5.1pp	18.2% +1.3pp	23.1%	14.4% +0.5pp	11.4% -2pp	9.2%	7.9%	5.1%	6.1%	3.6% +0.6pp	1.2%	1.2%	770
województwo pomorskie	27% -11.6pp	29.5% +5.8pp	25.5% +3.2pp	20% +4.3pp	19.5% +2.9pp	23.8%	13.2% -0.7pp	12% -0.3pp	9.4%	5.8%	4.6%	6.1%	2.3% +0.5pp	1.1%	0.9%	651
województwo łódzkie	29.2% -10pp	25.9% +4.3pp	24.6% +0.1pp	18.9% +3.7pp	15.7% +2.2pp	19.2%	17.2% +1pp	11.8% -3.2pp	7.4%	5.4%	3.4%	4.6%	2.6% +0.4pp	1.3%	0.8%	610
województwo kujawsko-pomorskie	29.3% -9.7pp	27% +2.5pp	25.2% -0.7pp	19.4% +5.1pp	14% +2.6pp	23.7%	14.2% -2.7pp	11.1% -0.9pp	9.5%	1.9%	2.1%	8.2%	3.3% +0.1pp	3.7%	0.8%	515
województwo zachodniopomorskie	27.7% -9.3pp	28.1% +4pp	26% +4pp	19.1% +3.7pp	21.6% +4.5pp	23.5%	17.2% +6.1pp	11.5% -3.9pp	9.2%	2.5%	3.1%	8%	2.1%	3.1%	1.9%	477

WHERE HAVE YOU BOUGHT CLOTHES FOR YOURSELF OR YOUR CHILD RECENTLY?

Analysis by age

n = 10540

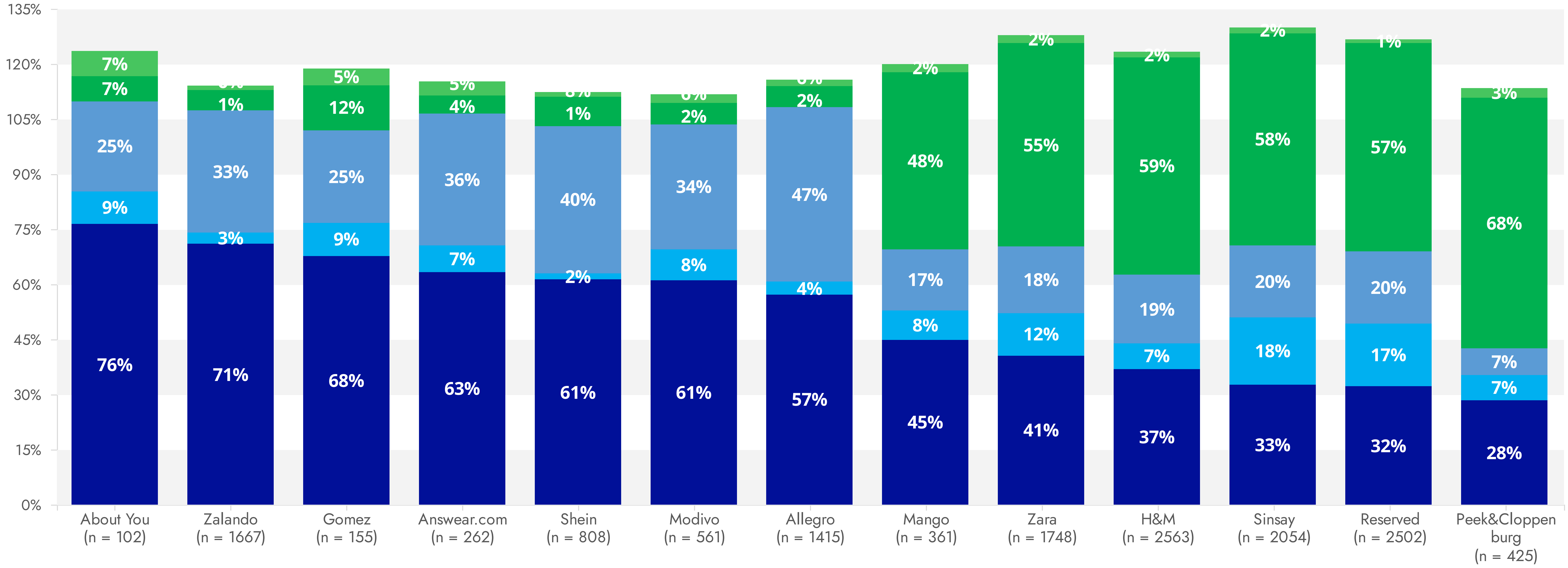


Regardless of age, in each group the place of the leader is occupied by H&M (among the youngest), Sinsay (among the 25-34 age group) or Reserved (among the elderly), . It's worth noting that as age increases after 45, the percentage of respondents who don't buy or can't remember their last clothing purchase increases.

HOW DID YOU BUY THE PRODUCTS THERE?

Purchasing channel of choice - multiple choice question

n = 7057



- 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

Depending on the store where purchases are made, survey respondents prefer different purchase methods. In the online channel, in addition to buying with home delivery, the method of picking up online orders at a particular postal or parcel service is very popular.

HOW DID YOU BUY THE PRODUCTS THERE?

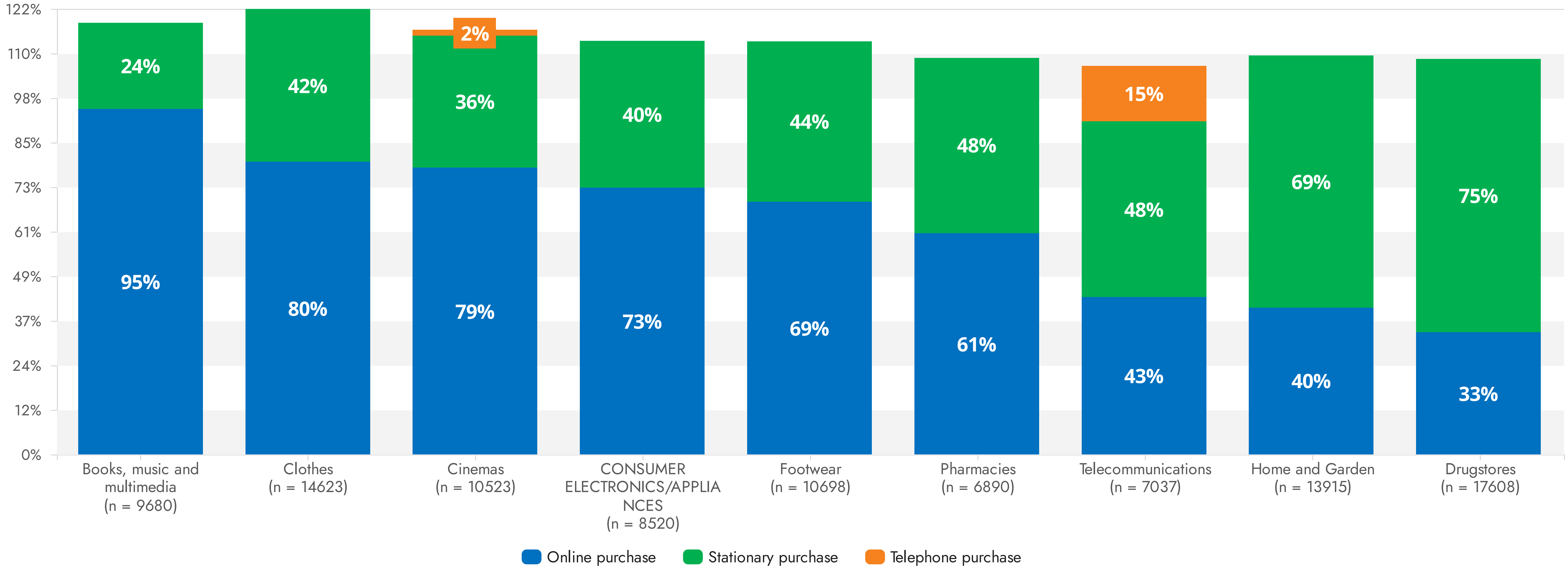
Purchasing channel of choice - Omnichannel 2023 with changes from 2022

n 2022 = 5962, 2023 = 3834

	Online with home delivery	Online with pickup in store	Online with pickup at the point (parcel locker, post office)	In a stationary store	In a stationary store with home delivery	Result count
H&M	36.9% +8.3pp	7% +3.7pp	18.7%	59.1% +4.1pp	1.5% +0.3pp	2563
Reserved	32.3% +5.9pp	17.1% +9.2pp	19.6%	56.8% +4.6pp	1%	2502
Zara	40.6% +8.7pp	11.6% +5.1pp	18.1%	55.4% +6.3pp	2.1% +0.6pp	1748
Zalando	71.1% -3pp	3.1% +0.5pp	33.2%	5.5% +3.4pp	1.2% +0.6pp	1667
Allegro	57.2% +1.1pp	3.5% +1.9pp	47.5%	5.7% +4.1pp	1.7% +0.8pp	1415
Modivo	61.1%	8.4%	34%	5.9%	2.3%	561
Peek&Cloppenburg	28.5%	6.8%	7.3%	68.2%	2.6%	425
Answear.com	63.4% -0.4pp	7.3% +2.5pp	35.9%	5% +1.6pp	3.8% +0.9pp	262
Gomez	67.7%	9%	25.2%	12.3%	4.5%	155
About You	76.5%	8.8%	24.5%	6.9%	6.9%	102

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

Comparison of channels chosen between industries



Comparing apparel purchasing methods with the industries surveyed in Omnichannel 2023 shows how large a share online sales have achieved, indicating that space for further organic growth is running out.

EXPERIENCE QUALITY INDICATORS

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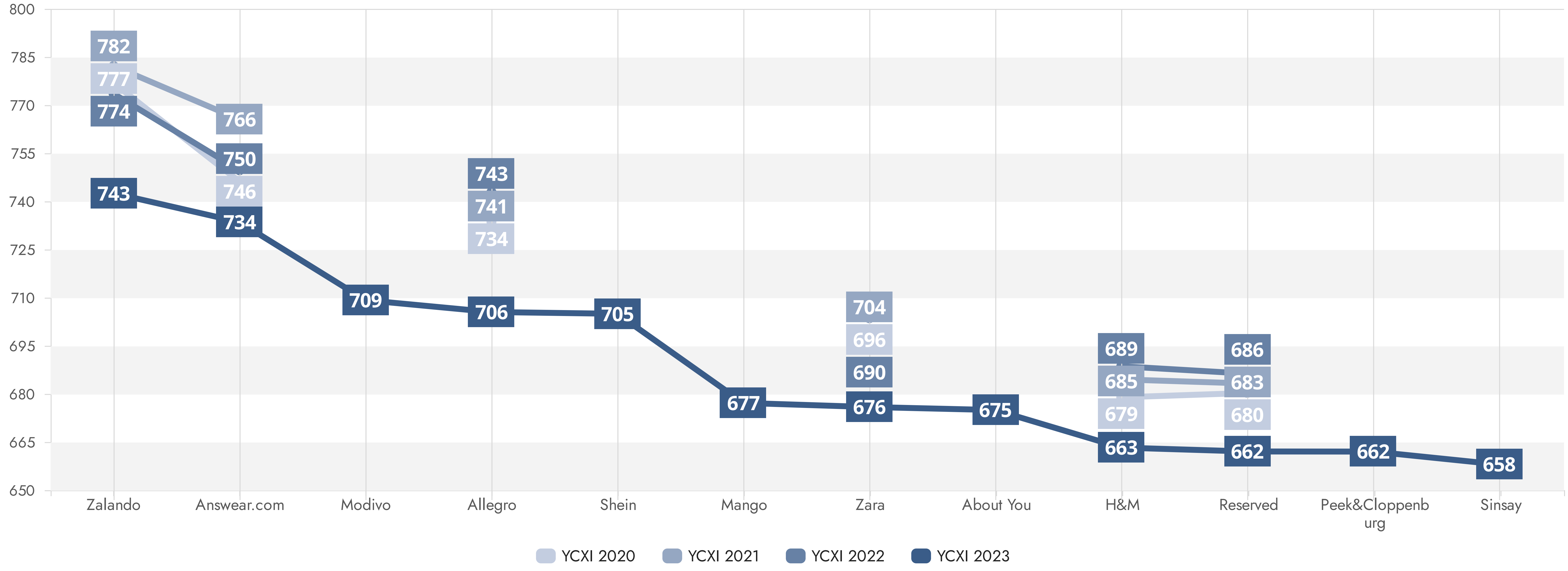
YOUR CUSTOMER EXPERIENCE INDEX

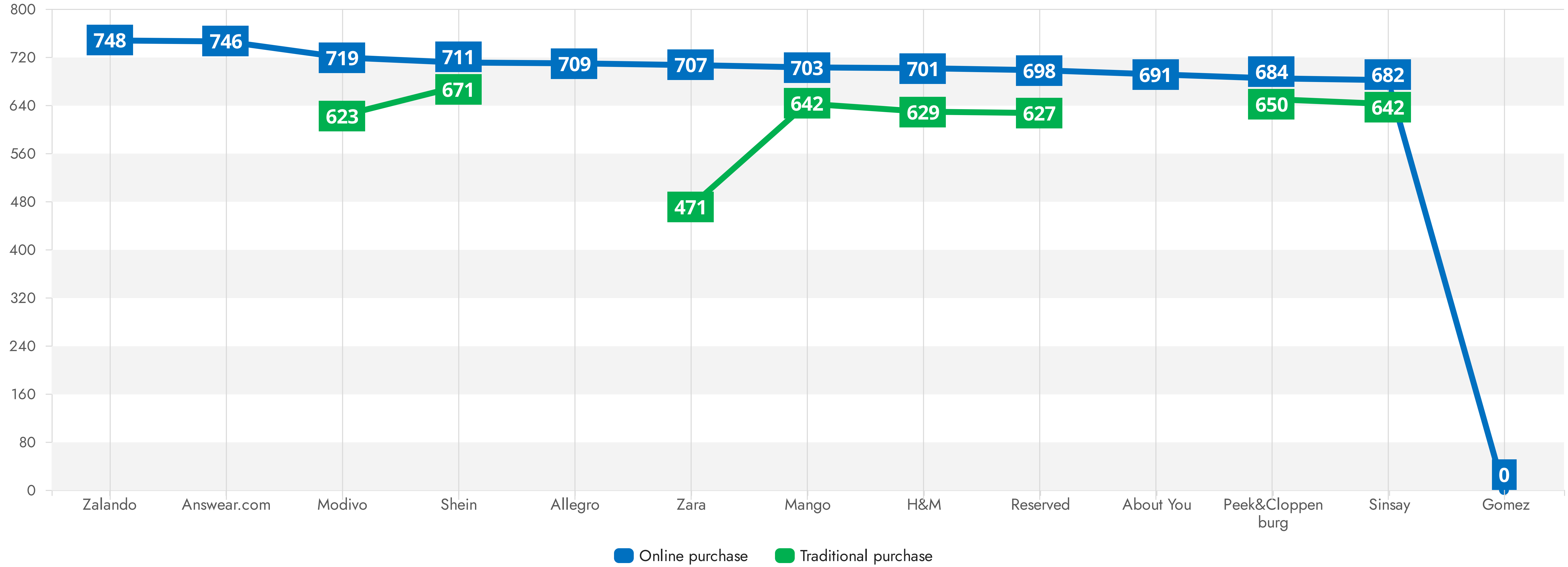
Quality index on a scale of 0 to 1000 taking into account four satisfaction factors:
availability and selection of products, ease of ordering, satisfaction with purchase, willingness to recommend the store to friends



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 a lot of room for improvement now that companies have scored in the neighborhood of 70% of possible points. The industry leaders are, as last year, Zalando and Answear.com. Among the companies that took part in previous editions of the survey, we see a marked decline in score values.

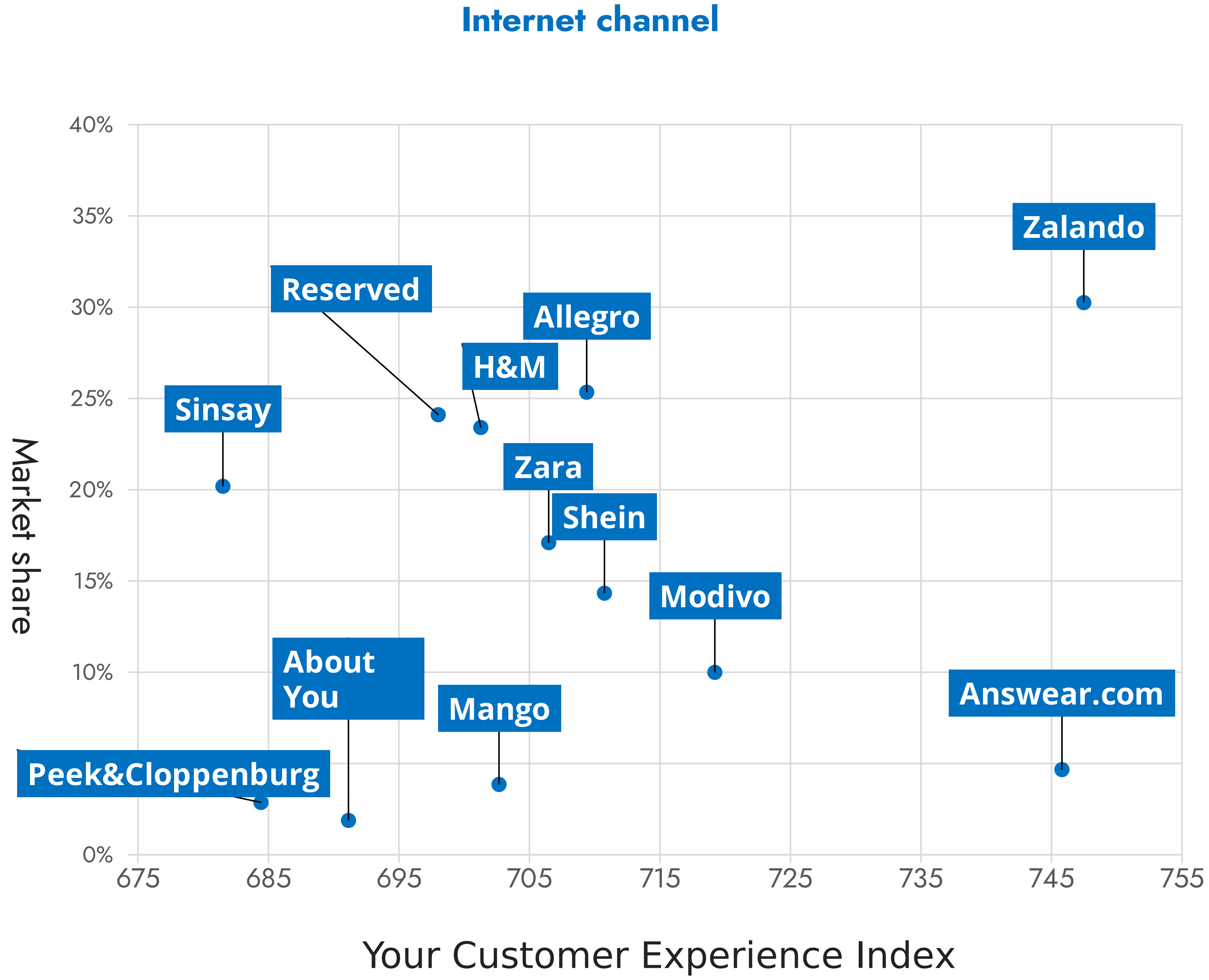
YOUR CUSTOMER EXPERIENCE INDEX

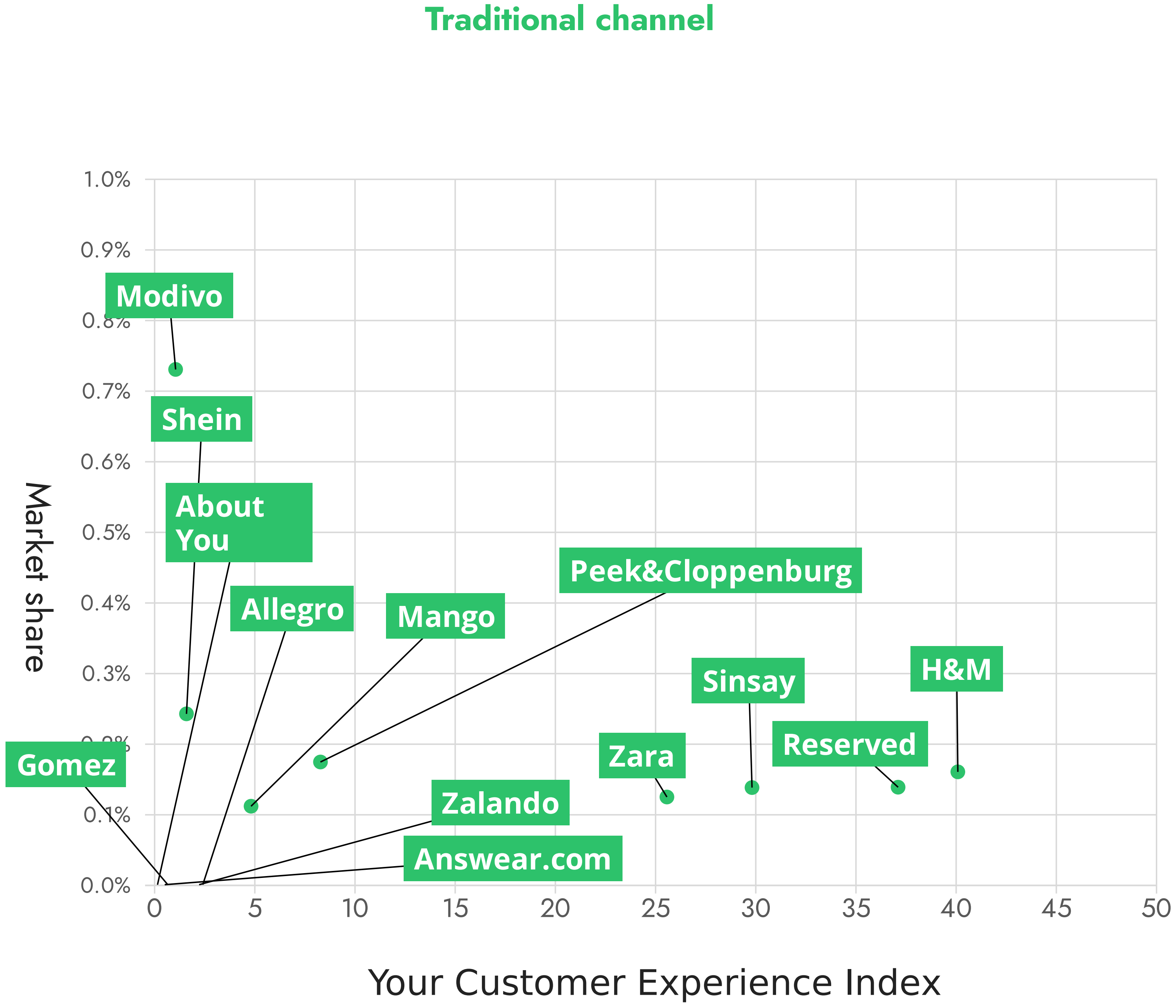
Quality index on a scale of 0 to 1000, broken down by purchasing channel



It is noteworthy that respondents rate the online shopping experience significantly higher than that from traditional sales. Zalando boasts the highest quality rating in the online channel, while Peek&Cloppenburg boasts the highest quality rating in the stationary sales channel.

YOUR CUSTOMER EXPERIENCE INDEX

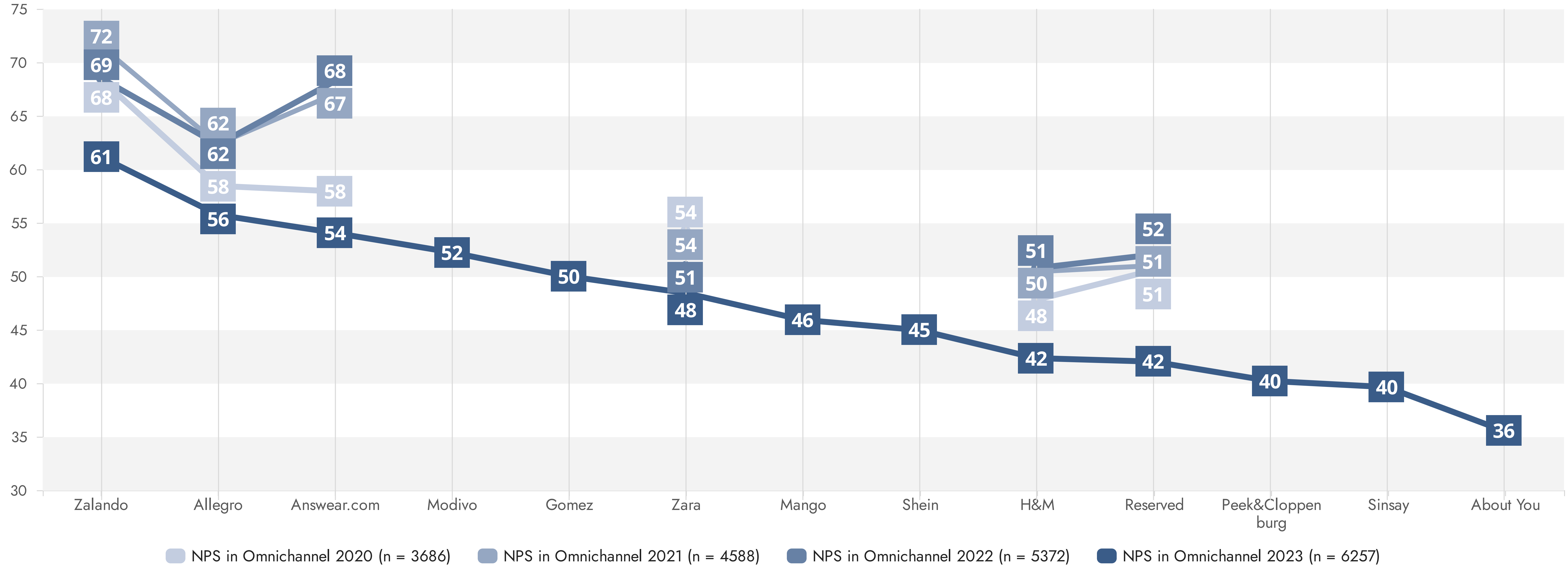




The charts show market shares by sales channel and Your Customer Experience Index value. In the online channel, Zalando dominates both with the largest market share and the highest index value. In the stationary channel, H&M has the largest share, and the position of experience leader in this area is held by Shein (??) / Peek&Cloppenburg.

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

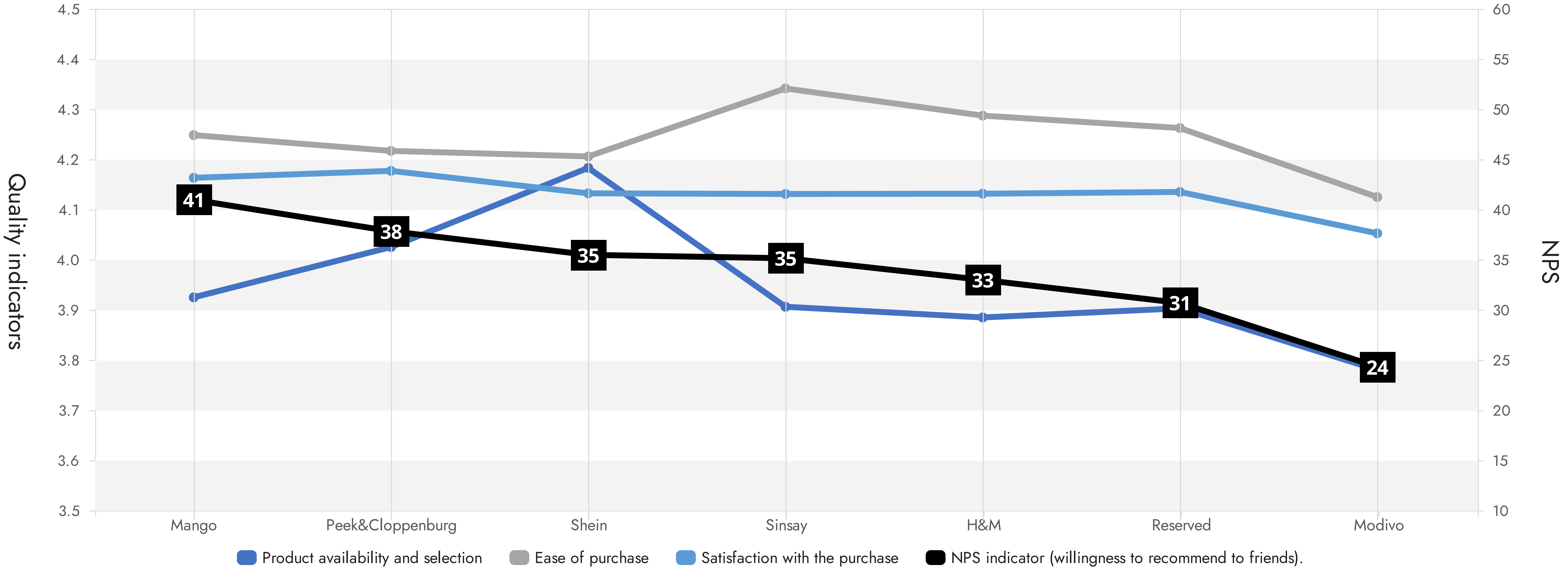
Comparison of NPS index values against last year's survey.



All of the cyclically surveyed companies recorded declines in NPS values. Despite the 11-point drop, Zalando remains the leader. In second place is Allegro, followed closely by Answear.com.

TRADITIONAL CHANNEL - EXPERIENCE QUALITY RATINGS

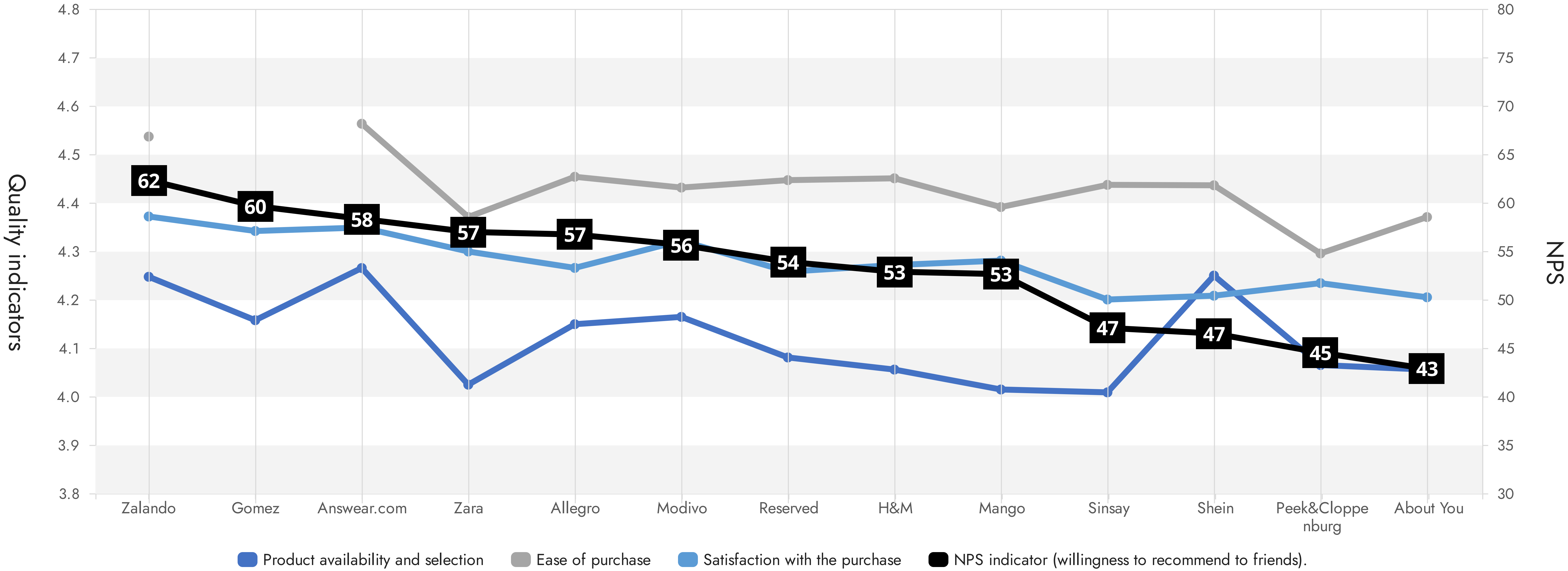
Quality ratings on a scale of 1 to 5 and NPS index on a scale of -100 to 100



We record the highest NPS in the traditional channel for Mango and Peek&Cloppenburg. The lowest ratings in all aspects of quality of experience are recorded for Modivo, which is also the least likely to be recommended among the brands surveyed.

ONLINE CHANNEL - EXPERIENCE QUALITY RATINGS

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



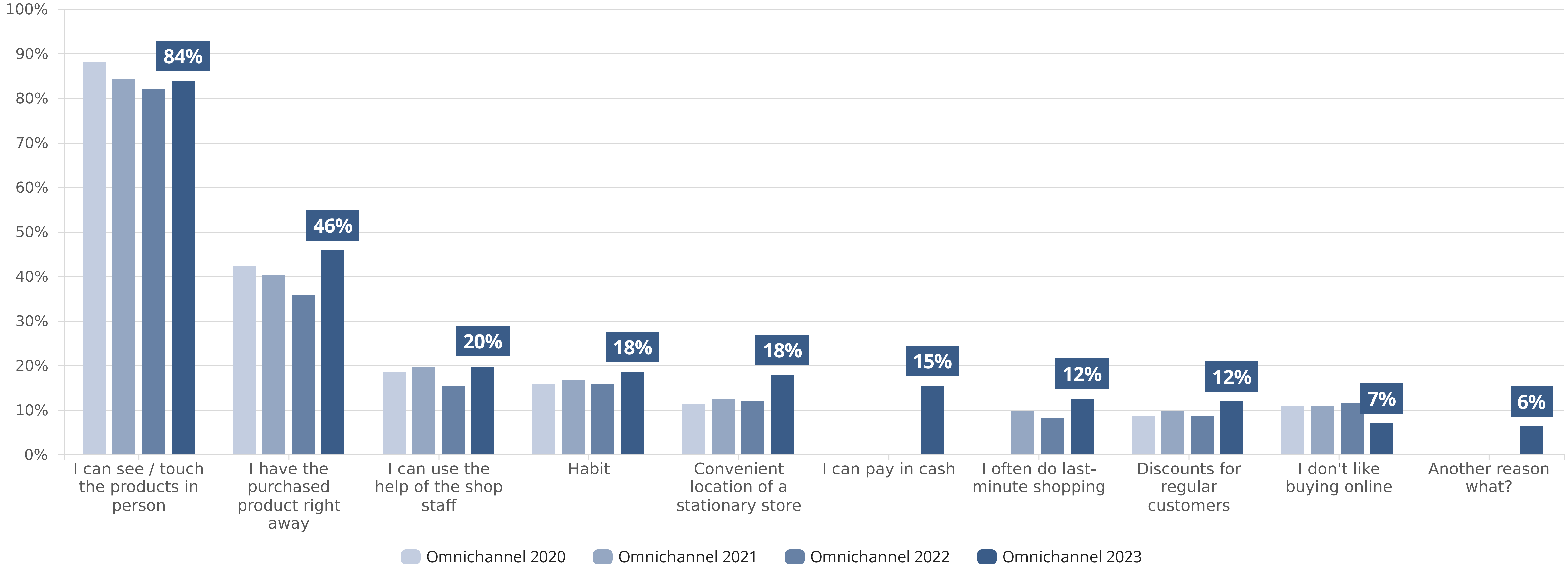
Analyzing individual aspects of the experience against the NPS indicator, we observe the strength of Answear.com, where a high rating for ease of purchase is also correlated with a high likelihood of recommending the brand to friends. However, we note the highest willingness to recommend the brand for Zalando.

SHOPPING PREFERENCES IN THE STATIONARY CHANNEL

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

Traditional channel - Multiple choice question

n 2020 = 2583, 2021 = 3584, 2022 = 3662, 2023 = 1625



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

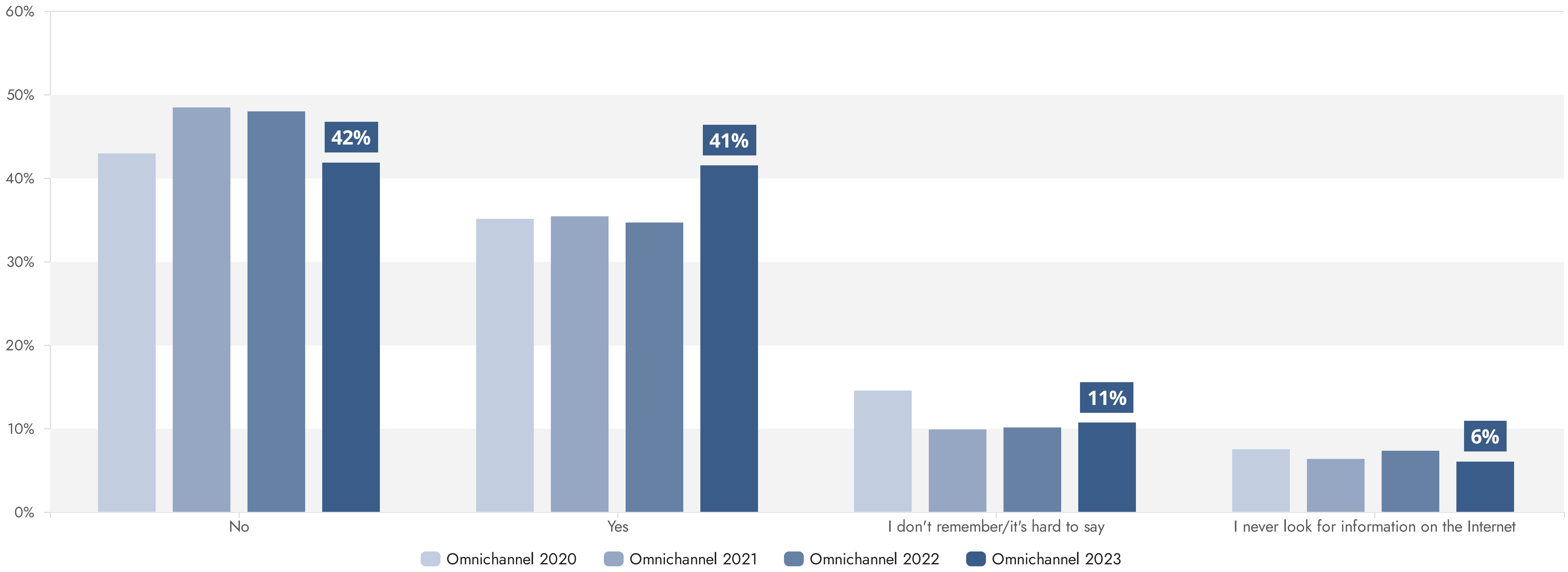
Traditional channel - Multiple choice question. Co-occurrence of factors

	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 store	Habit	I often do last-minute shopping	I can pay in cash	I don't like buying online	Another reason what?	Result count
I can see / touch the products in person		19.6%	11.2%	46.9%	17.6%	16.9%	12.3%	14.9%	6.7%	5.7%	1363
I can use the help of the shop staff	83.4%		25.3%	61.9%	27.8%	26.6%	17.5%	28.7%	7.8%	5.3%	320
Discounts for regular customers	79.3%	42%		64.2%	38.3%	30.1%	19.2%	36.3%	7.8%	3.1%	193
I have the purchased product right away	86%	26.6%	16.7%		27.1%	25.8%	17.6%	24%	7.1%	4.2%	743
Convenient location of a stationary store	83%	30.8%	25.6%	69.6%		34.3%	24.6%	27.7%	6.9%	2.1%	289
Habit	77.3%	28.4%	19.4%	64.2%	33.1%		22.7%	21.7%	7.4%	2.3%	299
I often do last-minute shopping	82.3%	27.6%	18.2%	64.5%	35%	33.5%		28.1%	10.3%	4.9%	203
I can pay in cash	81.5%	36.9%	28.1%	71.5%	32.1%	26.1%	22.9%		8.8%	3.2%	249

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

Traditional channel - Multiple choice question

n 2020 = 1254,2021 = 1439, 2022 = 1616, 2023 = 916

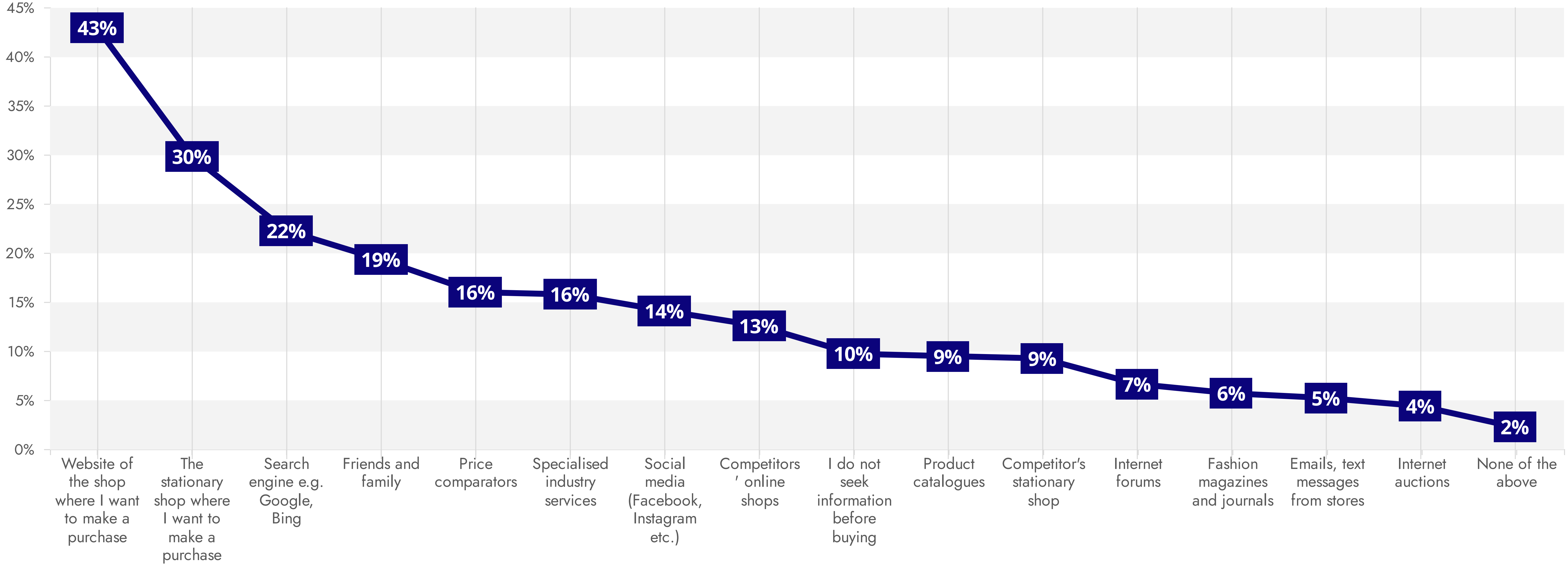


We observe an increase in the share of "yes" answers, by 6 p.p., at the same time respondents declare that they are increasingly unlikely to look online before shopping in a stationary store.

WHERE DO YOU OBTAIN PRODUCT INFORMATION BEFORE PURCHASE?

Traditional channel - Multiple choice question

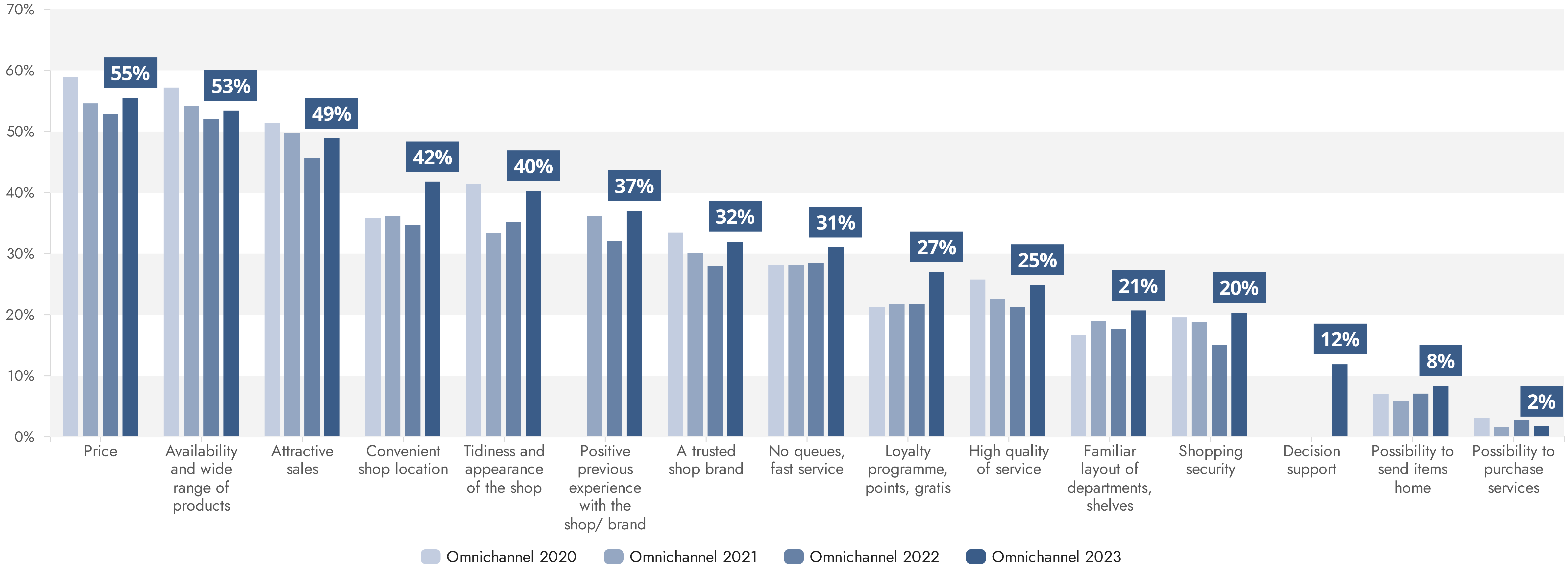
n = 844



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

Traditional channel - Multiple choice question

n 2020 = 1028, 2021 = 1218, 2022 = 1329, 2023 = 791

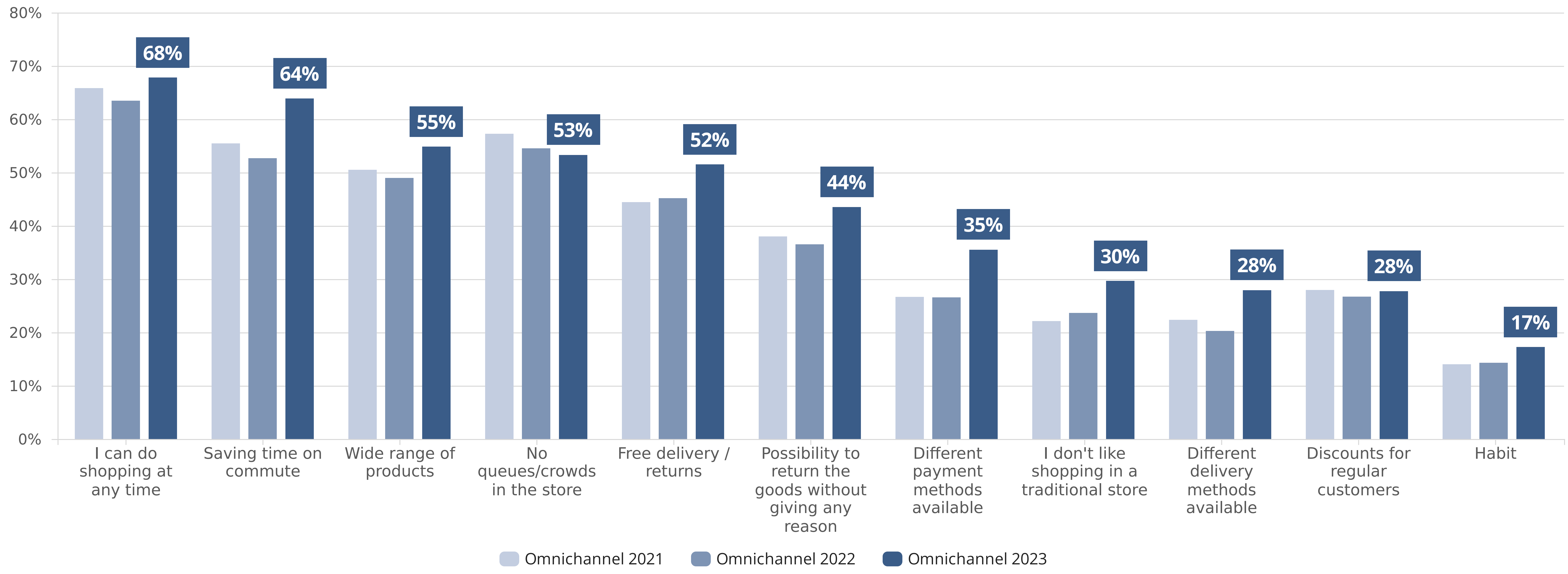


SHOPPING PREFERENCES IN THE ONLINE CHANNEL

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

Internet channel - Multiple choice question

n 2021 = 1908, 2022 = 2587, 2023 = 1524



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

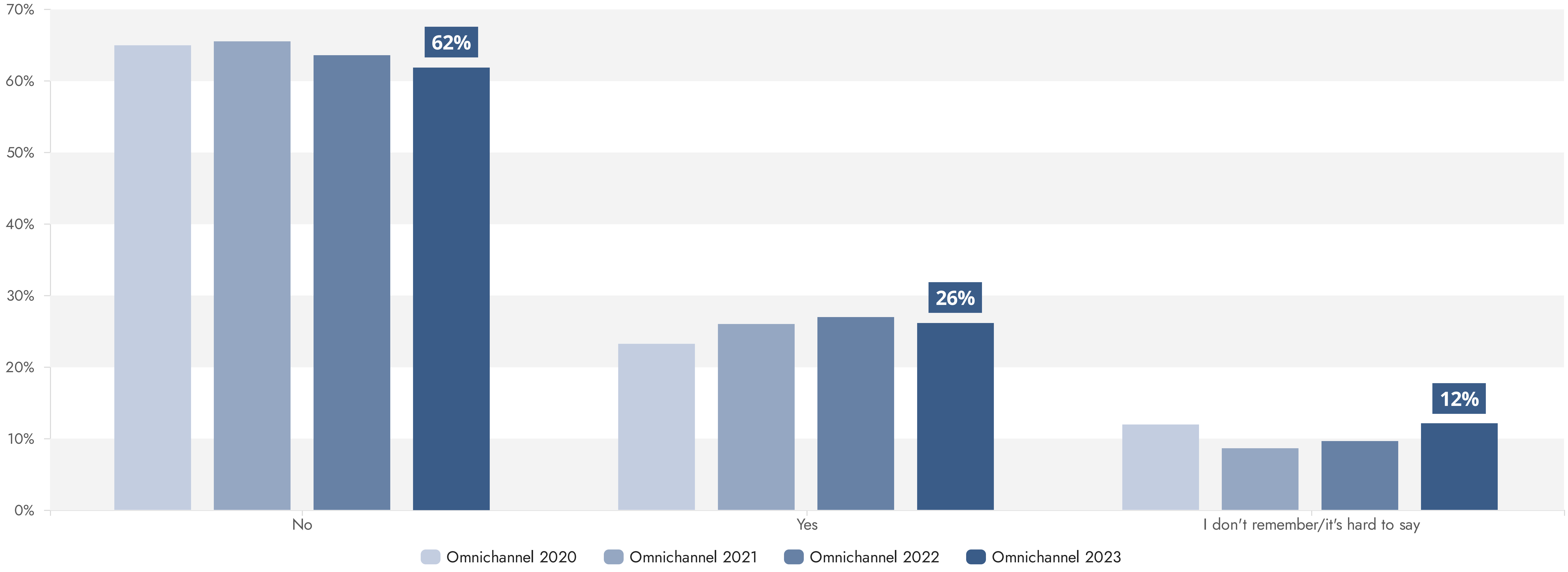
Internet channel - Multiple choice question. Co-occurrence of factors

	I can do shopping at any time	Saving time on commute	Wide range of products	No queues/crowds in the store	Free delivery / returns	Possibility to return the goods without giving any reason	Different payment methods available	I don't like shopping in a traditional store	Different delivery methods available	Discounts for regular customers	Habit	Result count
I can do shopping at any time		74.3%	65.4%	63.8%	61.2%	53.6%	44.4%	32.5%	35.5%	32.9%	19%	1033
Saving time on commute	78.9%		63.5%	64.9%	60.7%	50.9%	42.9%	33%	34.9%	32%	19.7%	973
Wide range of products	80.9%	73.9%		66.3%	62.6%	56.2%	49.2%	32.5%	39.6%	32.9%	21.2%	836
No queues/crowds in the store	81.2%	77.7%	68.2%		62.3%	54.9%	46.7%	36.1%	39.7%	34.6%	22.5%	812
Free delivery / returns	80.5%	75.3%	66.6%	64.5%		62.7%	47.5%	32.4%	38.7%	38.7%	21.5%	785
Possibility to return the goods without giving any reason	83.6%	74.7%	70.9%	67.3%	74.2%		50.7%	32.3%	41.2%	37.7%	21.9%	663
Different payment methods available	84.8%	77.1%	76%	70.1%	68.9%	62.1%		35.7%	53%	42.1%	27.4%	541
I don't like shopping in a traditional store	74.3%	71%	60.2%	64.8%	56.2%	47.3%	42.7%		35.2%	29.6%	22.1%	452
Different delivery methods available	86.4%	80%	77.9%	75.8%	71.5%	64.2%	67.5%	37.4%		42.1%	26.6%	425

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

Kanał internetowy - Pytanie wielokrotnego wyboru

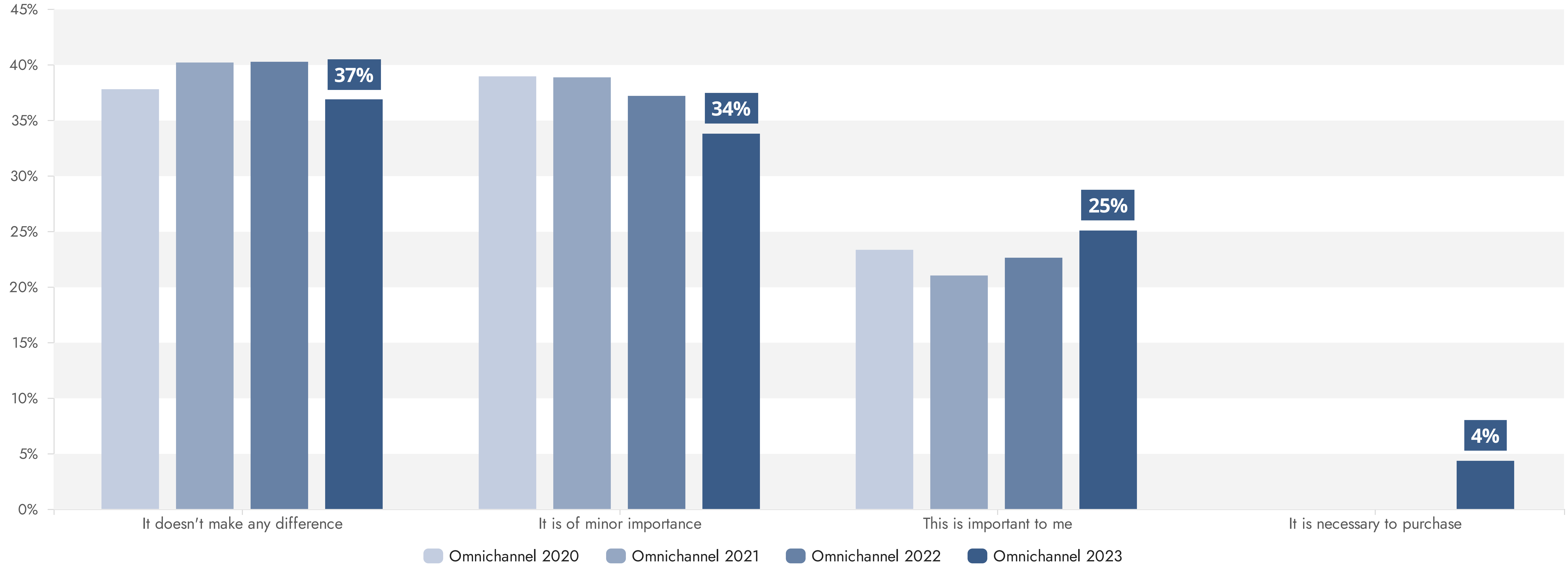
n 2020 = 1812, 2021 = 2465, 2022 = 2869, 2023 = 1597



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

Internet channel - Multiple choice question

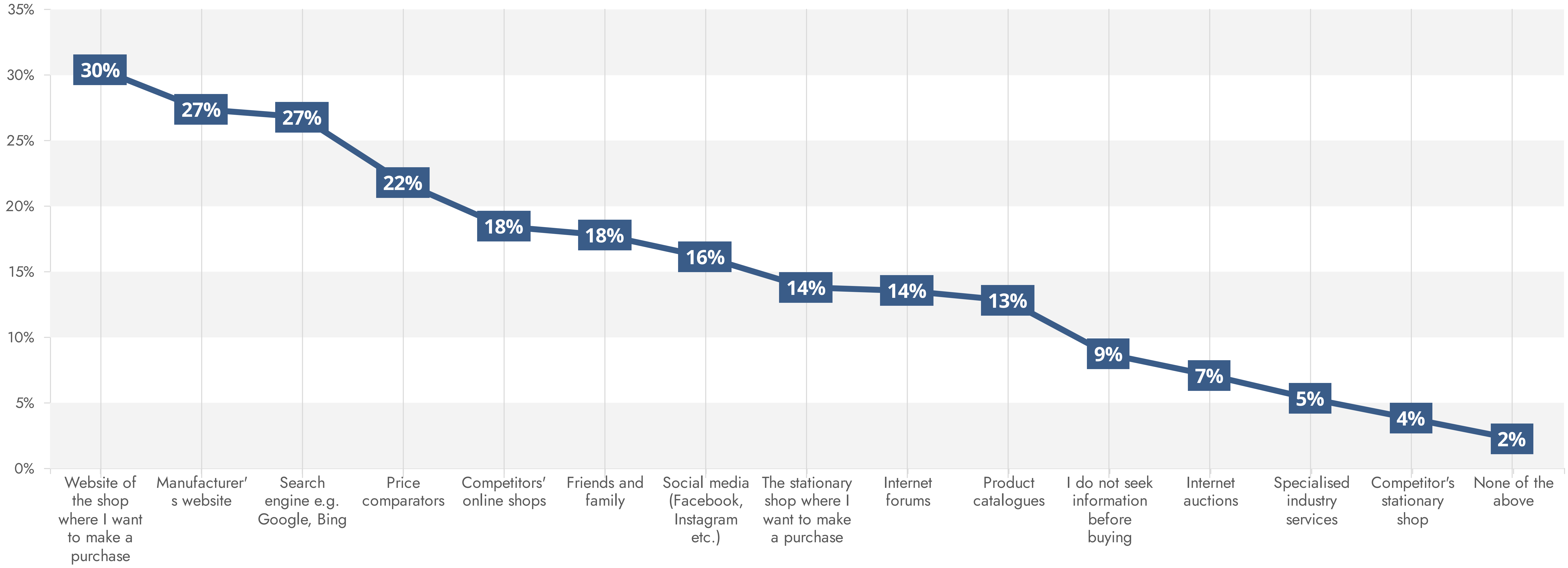
n 2020 = 1750, 2021 = 2415, 2022 = 2779, 2023 = 1549



WHERE DO YOU OBTAIN PRODUCT INFORMATION BEFORE PURCHASE?

Kanał internetowy - Pytanie wielokrotnego wyboru

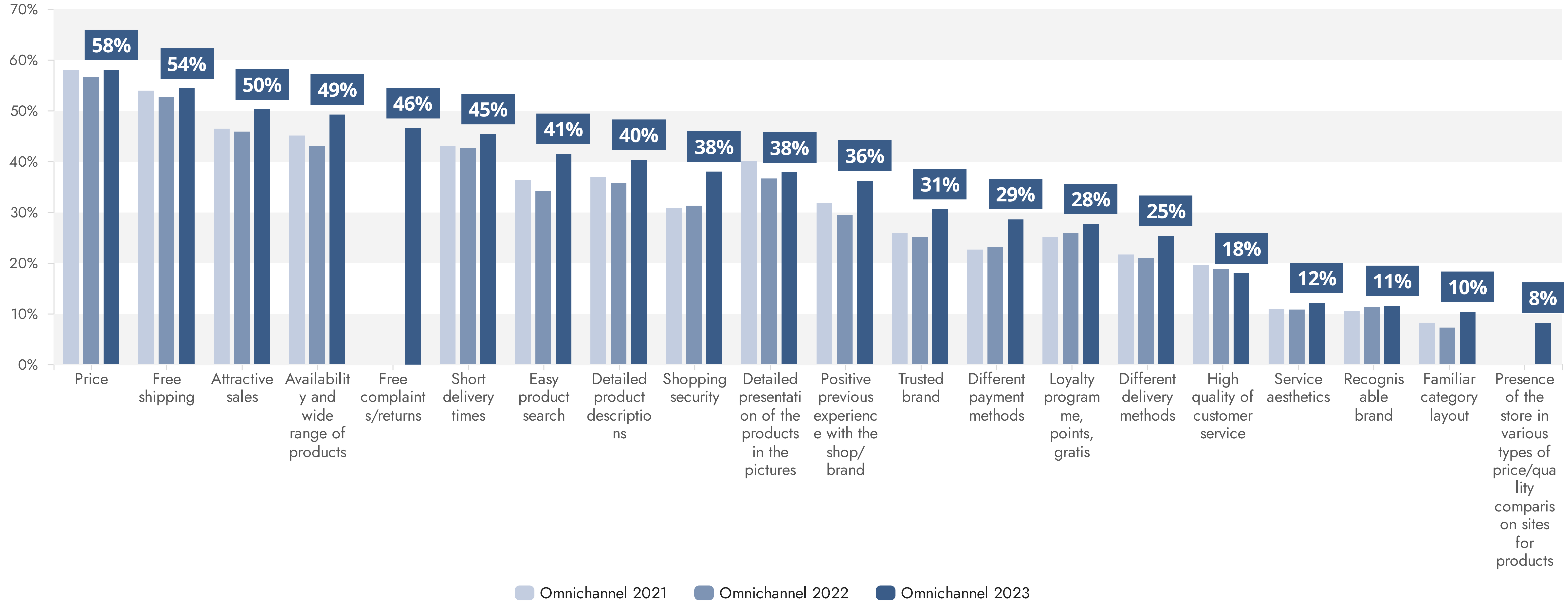
n = 1510



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

Internet channel - Multiple choice question

n 2021 = 2073, 2022 = 2339, 2023 = 1375

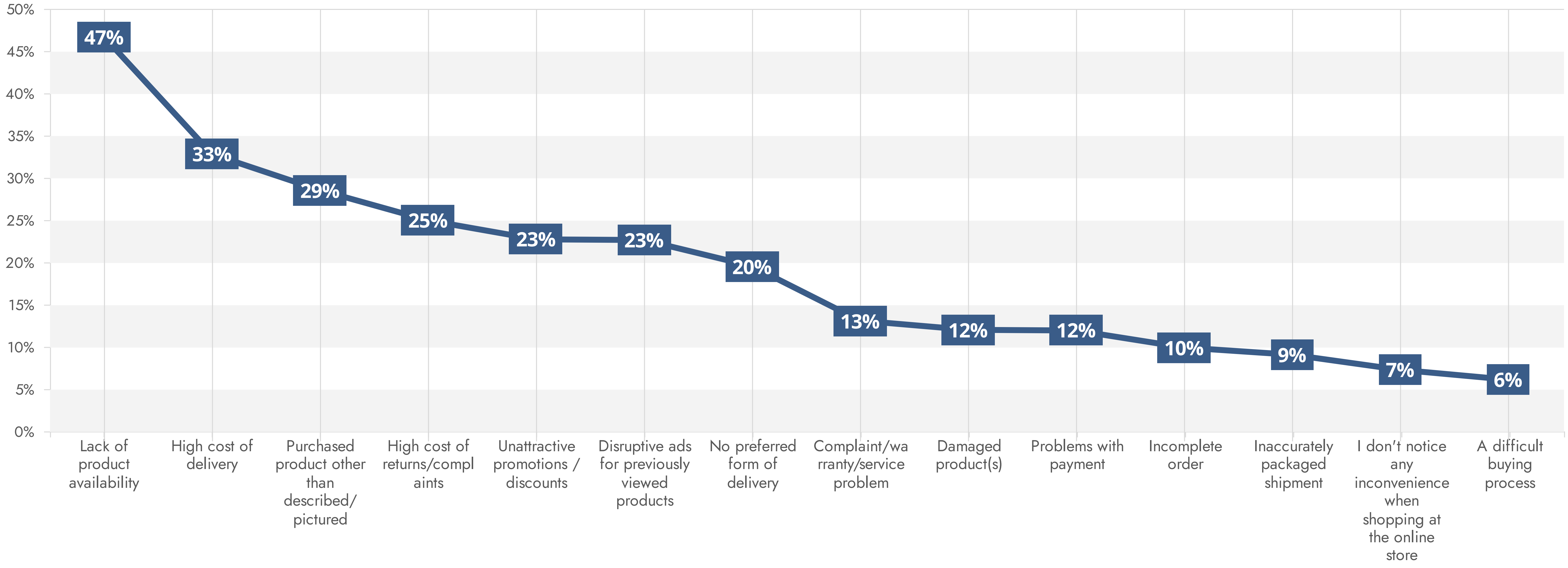


The price of the product z still has a key importance for the customer, but all the accompanying circumstances such as free returns or security of purchases are becoming increasingly important.

WHAT INCONVENIENCES DO YOU ENCOUNTER WHEN SHOPPING FOR CLOTHES IN AN ONLINE STORE?

Kanał internetowy - Pytanie wielokrotnego wyboru

n = 1289

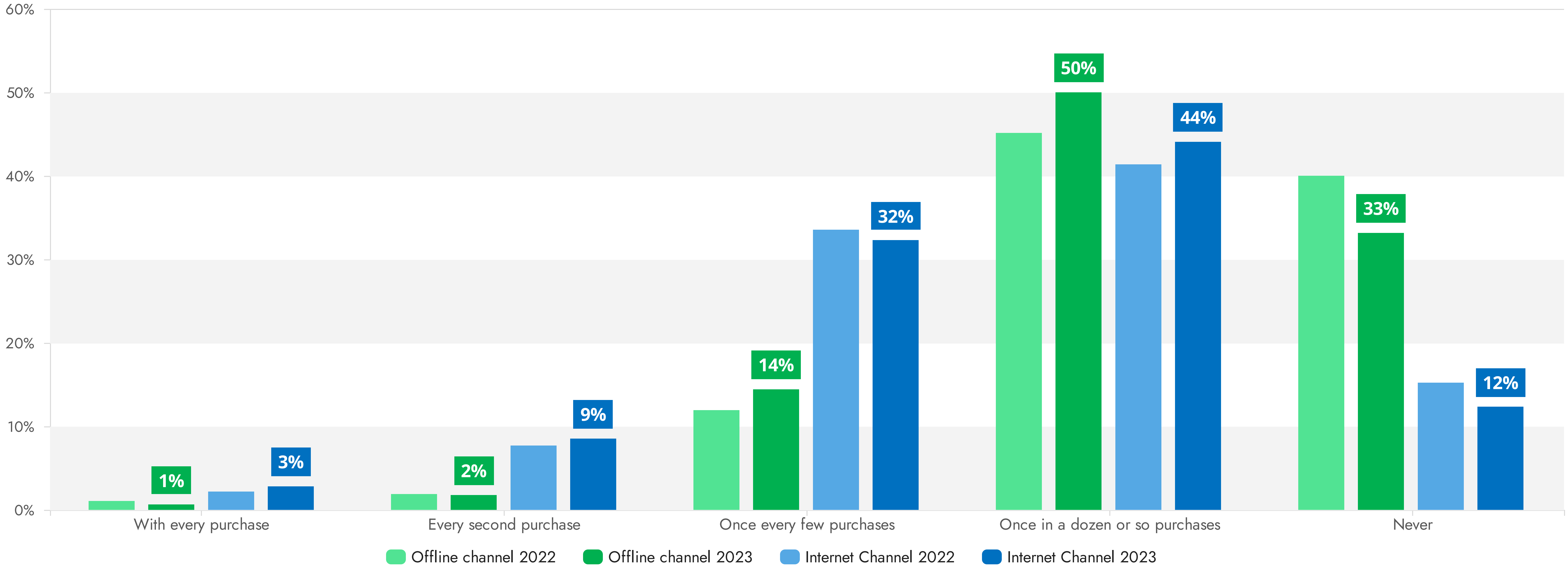


POST-PURCHASE EXPERIENCE

HOW OFTEN DO YOU RETURN CLOTHES PURCHASED IN A STATIONARY SHOP (COMPLAINT / RETURN / EXCHANGE)?

Single-choice question

n kanał internetowy = 1362, n kanał stacjonarny = 790

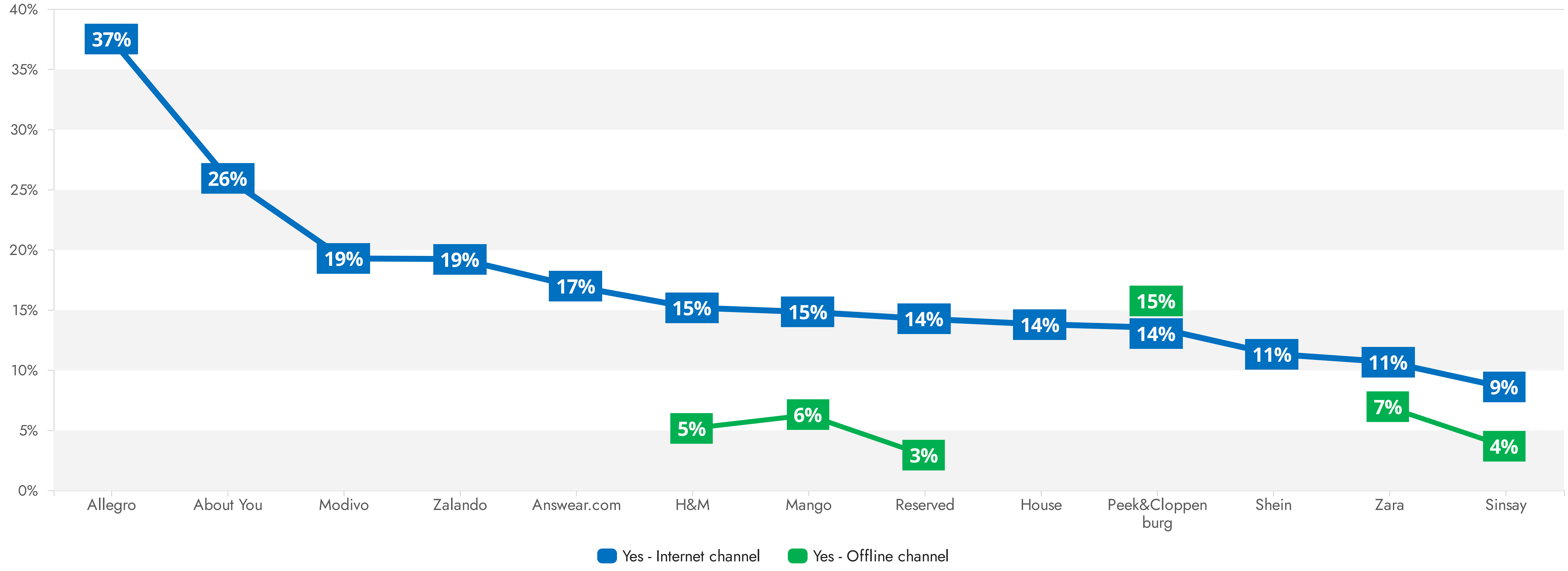


We already know that the ecommerce segment is going from strength to strength, but it should be noted that the share of returns of purchased products in this channel is much higher than in traditional sales, which in turn is associated with increased work of after-sales service. Also relative to last year, the share of people who never return products bought online has fallen.

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

Analysis of customers in contact with Customer Service Offices

n sklep online = 1413, n sklep tradycyjny = 912



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 nine product segments


Cinemas


Clothes

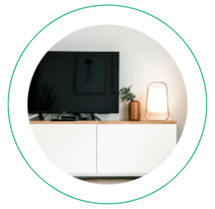

Drugstores


Footwear


Pharmacies


Telecommunicatio


Home and garden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Piotr Wojnarowicz

p.wojnarowicz@yourcx.io

+48 661 627 620

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