YourCX

REPORT

# OMNI CHA NNEL 2023



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

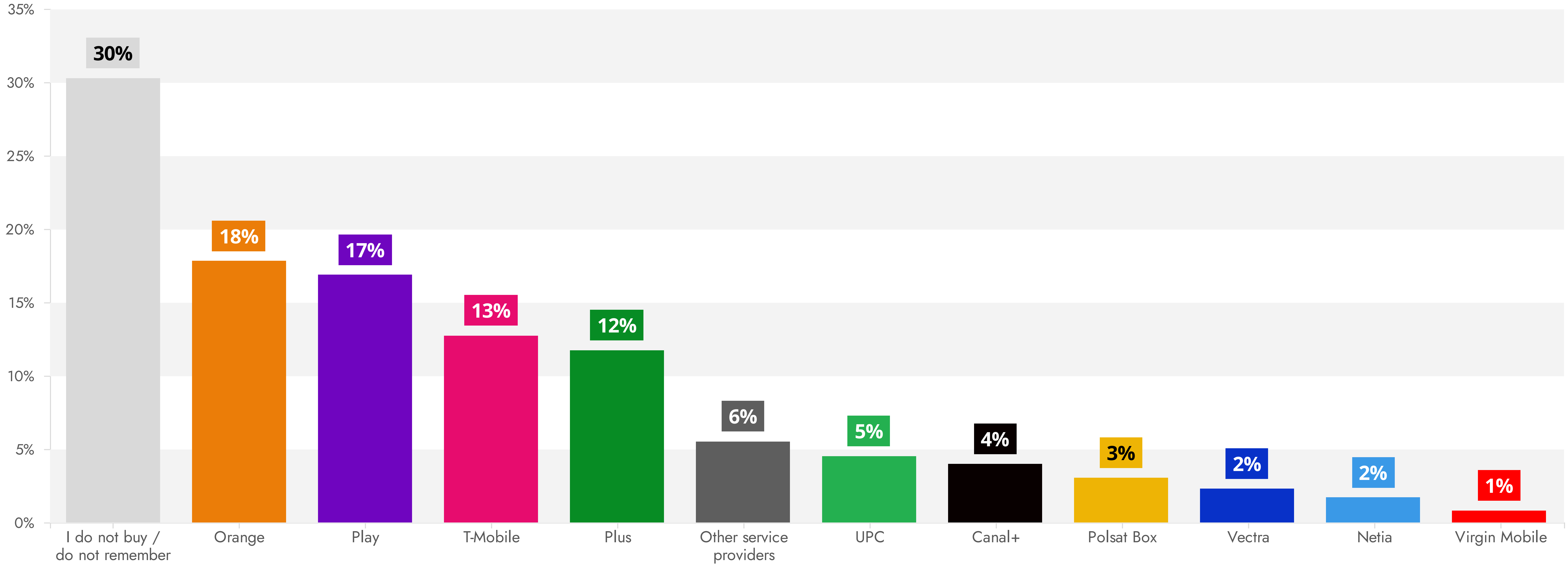
**EXAMPLES OF CALCULATIONS FOR COMPANY XYZ**

| | 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 A TELECOMMUNICATIONS SERVICE (PHONE, INTERNET, TV, SUBSCRIPTION, PREPAID OFFER, ETC.)?

Multiple choice question

n = 10958



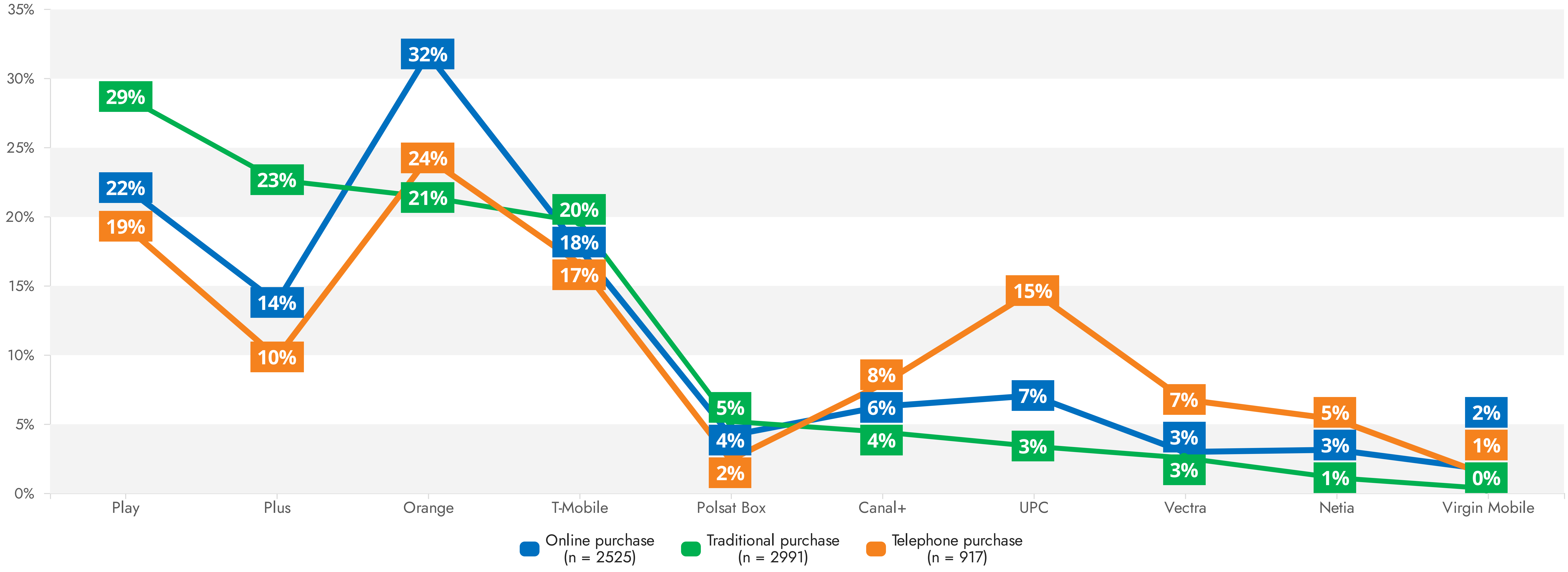



In the telecommunications industry, Orange has moved into the leading position, followed closely by Play and T-Mobile. Thirty percent of respondents either did not buy or do not remember buying telecommunications services. The leading brands each received several percent of respondents' indications. The results are aggregated for all shopping channels (online and traditional shopping combined).

# WHERE HAVE YOU RECENTLY PURCHASED A TELECOMMUNICATIONS SERVICE (PHONE, INTERNET, TV, SUBSCRIPTION, PREPAID OFFER, ETC.)?

Market shares by purchase channel

n = 2525 online purchase, 2991 landline purchase, 917 telephone purchase

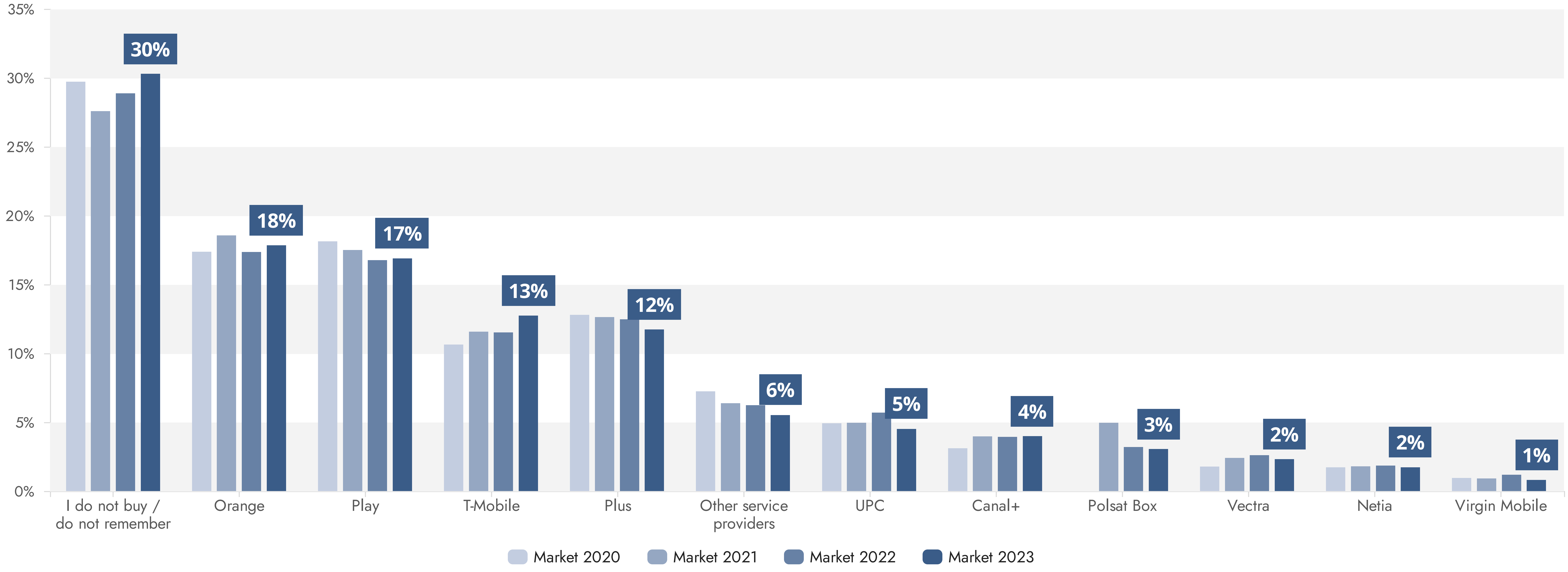



Depending on the company from which respondents purchase telecommunications services, purchase channel preferences are distributed differently. In the online channel, Orange is the leader, while Play is the leader in traditional sales.

# WHERE HAVE YOU RECENTLY PURCHASED A TELECOMMUNICATIONS SERVICE (PHONE, INTERNET, TV, SUBSCRIPTION, PREPAID OFFER, ETC.)?

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

n 2020 = 8452, 2021 = 12263, 2022 = 13241, 2023 = 10958



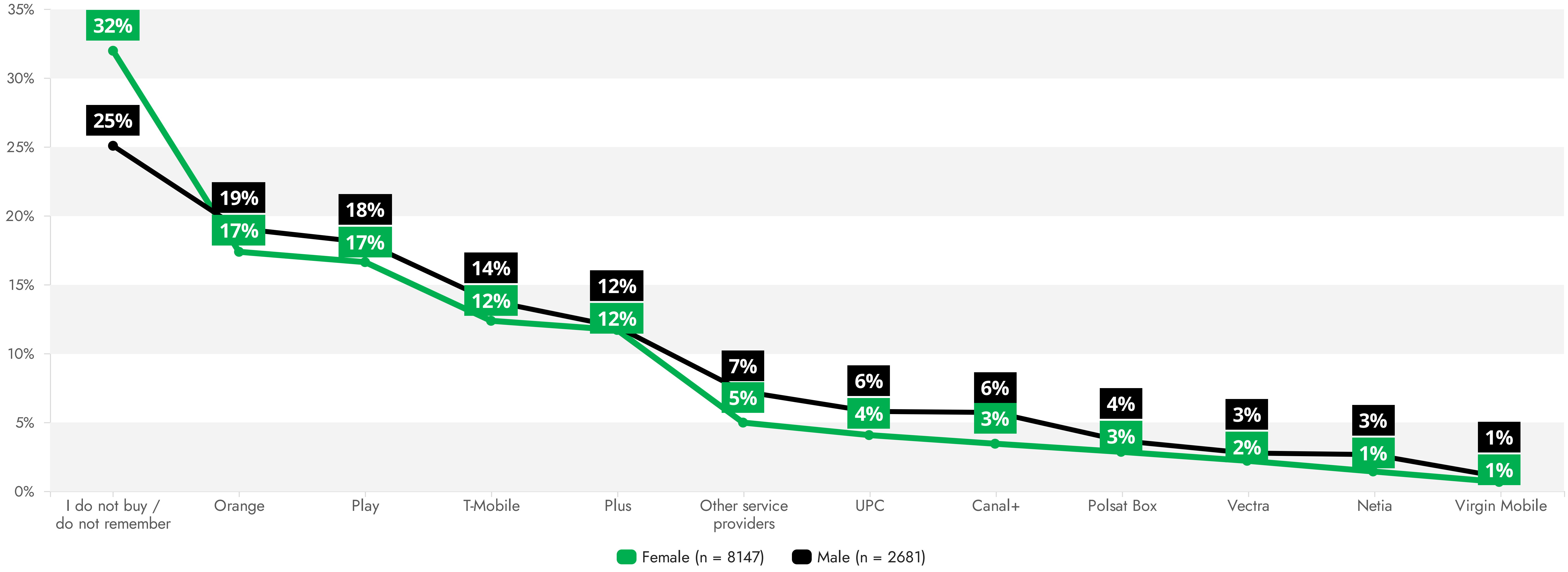



Comparing the results of Omnichannel 2023 with previous editions of the survey, we see a decrease in the share of purchases on the Plus and UPC networks. An increase is noticeable for Orange, Play and T-Mobile networks. It is worth noting the increase in indications for the answer "I don't buy/remember buying telecommunications services."

# WHERE HAVE YOU RECENTLY PURCHASED A TELECOMMUNICATIONS SERVICE (PHONE, INTERNET, TV, SUBSCRIPTION, PREPAID OFFER, ETC.)?

Analysis by gender

n = 10828






Women are less likely to buy telecommunications services than men. Men are more likely to choose the leading operators, among the other operators we do not observe large differences.

# WHERE HAVE YOU RECENTLY PURCHASED A TELECOMMUNICATIONS SERVICE (PHONE, INTERNET, TV, SUBSCRIPTION, PREPAID OFFER, ETC.)?

Analysis by gender in 2023 with changes relative to 2022

n 2022 = 12753, 2023 = 10828

| | I do not buy / do not remember | Orange | Play | T-Mobile | Plus | Other service providers | UPC | Canal+ | Polsat Box | Vectra | Netia | Virgin Mobile | Result count |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Female** | 32% +1.2pp | 17.4% +0.2pp | 16.6% -0.2pp | 12.4% +1.2pp | 11.7% -0.6pp | 5% -0.5pp | 4.1% -0.9pp | 3.4% -0.2pp | 2.8% | 2.2% -0.1pp | 1.4% -0.2pp | 0.7% -0.2pp | 8147 |
| **Male** | 25.1% +2.1pp | 19.1% +0.4pp | 18.1% +0.7pp | 13.8% +0.5pp | 11.9% -1.6pp | 7.2% -0.5pp | 5.8% -2.2pp | 5.7% +1pp | 3.7% -0.5pp | 2.8% -0.6pp | 2.6% +0.3pp | 1% -0.5pp | 2681 |

# WHERE HAVE YOU RECENTLY PURCHASED A TELECOMMUNICATIONS SERVICE (PHONE, INTERNET, TV, SUBSCRIPTION, PREPAID OFFER, ETC.)?

Analysis by 7 provinces with largest samples in 2023 with changes from 2022

n 2022 = 12060, 2023 = 6967

| | I do not buy / do not remember | Orange | Play | T-Mobile | Plus | UPC | Other service providers | Canal+ | Vectra | Polsat Box | Netia | Virgin Mobile | Result count |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| województwo mazowieckie | 31.4% +3pp | 21% -0.8pp | 16.8% +1.5pp | 13% +0.8pp | 8.2% -0.9pp | 8% -3.1pp | 3.9% -0.5pp | 3.8% | 2.9% +0.1pp | 2.4% -0.2pp | 1.1% -0.3pp | 0.6% -0.3pp | 1872 |
| województwo śląskie | 28.1% -0.1pp | 19.2% +0.1pp | 17.5% | 14.1% +2.3pp | 9.8% -0.8pp | 5.3% -1.9pp | 6.4% +0.9pp | 5.5% +1.5pp | 2.4% +0.5pp | 1.9% -0.8pp | 1.6% +0.1pp | 1.1% +0.1pp | 1133 |
| województwo wielkopolskie | 31.9% +1.4pp | 16.3% -0.8pp | 13.7% +0.6pp | 13.6% +0.3pp | 17.3% -0.1pp | 0.8% -0.2pp | 5.4% -2.2pp | 3.4% -0.4pp | 0.9% -0.2pp | 3.8% +1.3pp | 1.6% +0.4pp | 0.7% -0.5pp | 1032 |
| województwo dolnośląskie | 30% +1.5pp | 14.8% -0.6pp | 17.8% -2.3pp | 13.2% +2.5pp | 13.4% -1.1pp | 3.6% -0.2pp | 4.5% -1.2pp | 3.6% -1.1pp | 2.7% +0.3pp | 3.4% +0.4pp | 4.7% +1.2pp | 1% -0.2pp | 880 |
| województwo małopolskie | 27.5% -2.6pp | 18.4% +1.8pp | 20.1% -0.6pp | 13.6% +1.9pp | 8.7% +0.5pp | 6% -2.2pp | 5.7% +1.2pp | 3.5% +0.1pp | 0.6% -0.4pp | 1.9% | 2.2% +0.4pp | 0.5% -0.6pp | 771 |
| województwo pomorskie | 27.9% -1.4pp | 17.4% -1.1pp | 18.6% +2.5pp | 11.9% +1pp | 10.9% -0.1pp | 7.2% +0.5pp | 6.6% +1pp | 3.8% | 4.9% +0.4pp | 3.7% +0.7pp | 1.5% -0.2pp | 0.9% | 678 |
| województwo łódzkie | 28.3% -4.4pp | 18.5% +5.3pp | 17.8% +1.1pp | 12.5% +0.3pp | 14.6% +0.2pp | 1.8% +0.9pp | 6.3% -1.8pp | 3.7% +0.7pp | 1.5% | 3.7% +0.7pp | 2% +0.4pp | 1% -0.2pp | 601 |

It is useful to look at market share data through the lens of geographic areas, between which differences can be very large.

# WHERE HAVE YOU RECENTLY PURCHASED A TELECOMMUNICATIONS SERVICE (PHONE, INTERNET, TV, SUBSCRIPTION, PREPAID OFFER, ETC.)?

Analysis by age

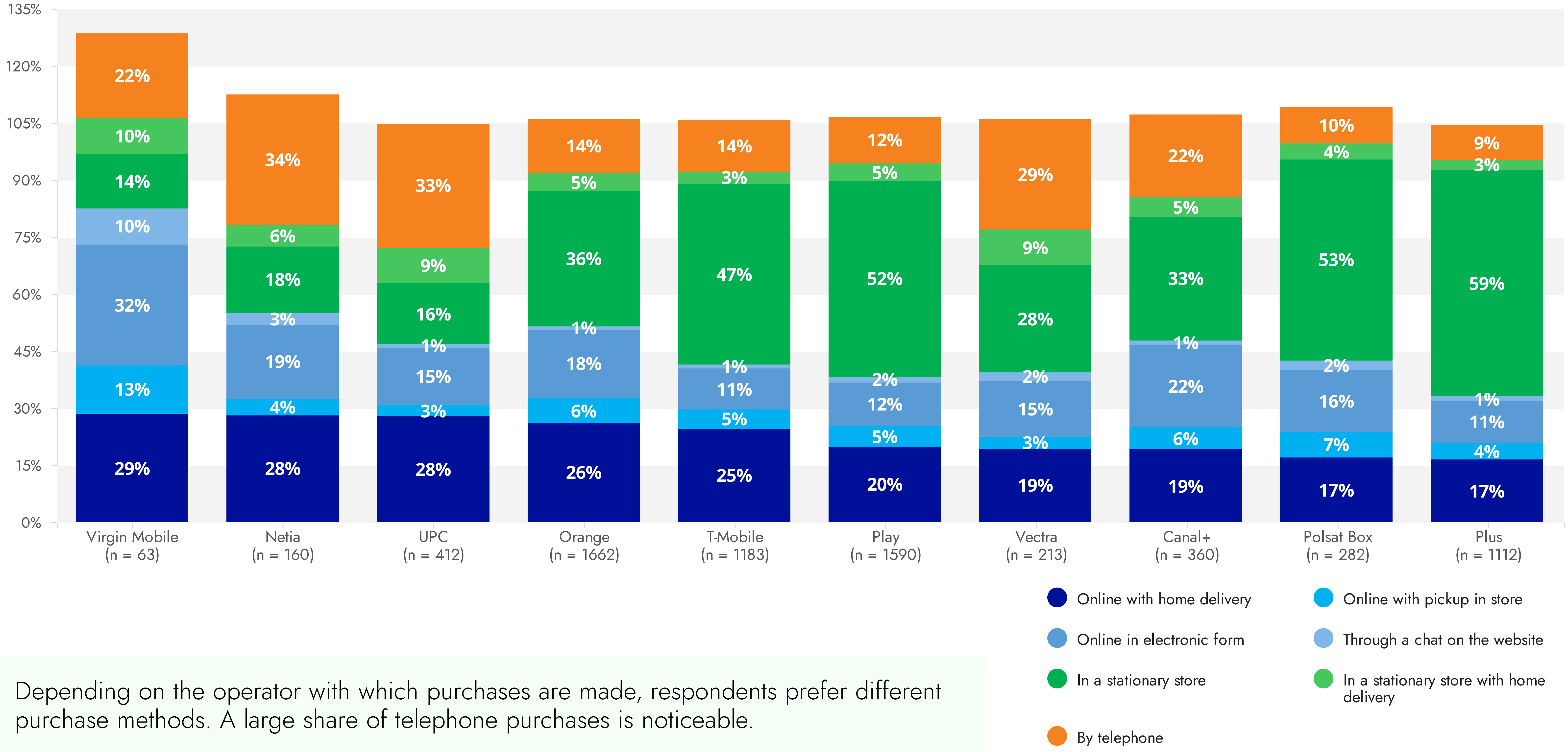
n = 10500


Depending on the age of the respondent, either Play or Orange takes the leading place. We can see a good match between the brands and the needs of different groups of customers. It is worth noting that among the oldest, we observe the lowest percentage of indications of no purchase in this category.

# HOW DID YOU BUY PRODUCTS THERE?

Purchasing channel of choice - multiple choice question

n = 6151




| | Virgin Mobile (n = 63) | Netia (n = 160) | UPC (n = 412) | Orange (n = 1662) | T-Mobile (n = 1183) | Play (n = 1590) | Vectra (n = 213) | Canal+ (n = 360) | Polsat Box (n = 282) | Plus (n = 1112) |
|---|---|---|---|---|---|---|---|---|---|---|
| By telephone | 22% | 34% | 33% | 14% | 14% | 12% | 29% | 22% | 10% | 9% |
| In a stationary store with home delivery | 10% | 6% | 9% | 5% | 3% | 5% | 9% | 5% | 4% | 3% |
| In a stationary store | 14% | 18% | 16% | 36% | 47% | 52% | 28% | 33% | 53% | 59% |
| Through a chat on the website | 10% | 3% | 1% | 1% | 1% | 2% | 2% | 1% | 2% | 1% |
| Online in electronic form | 32% | 19% | 15% | 18% | 11% | 12% | 15% | 22% | 16% | 11% |
| Online with pickup in store | 13% | 4% | 3% | 6% | 5% | 5% | 3% | 6% | 7% | 4% |
| Online with home delivery | 29% | 28% | 28% | 26% | 25% | 20% | 19% | 19% | 17% | 17% |

Depending on the operator with which purchases are made, respondents prefer different purchase methods. A large share of telephone purchases is noticeable.

# HOW DID YOU BUY PRODUCTS THERE?

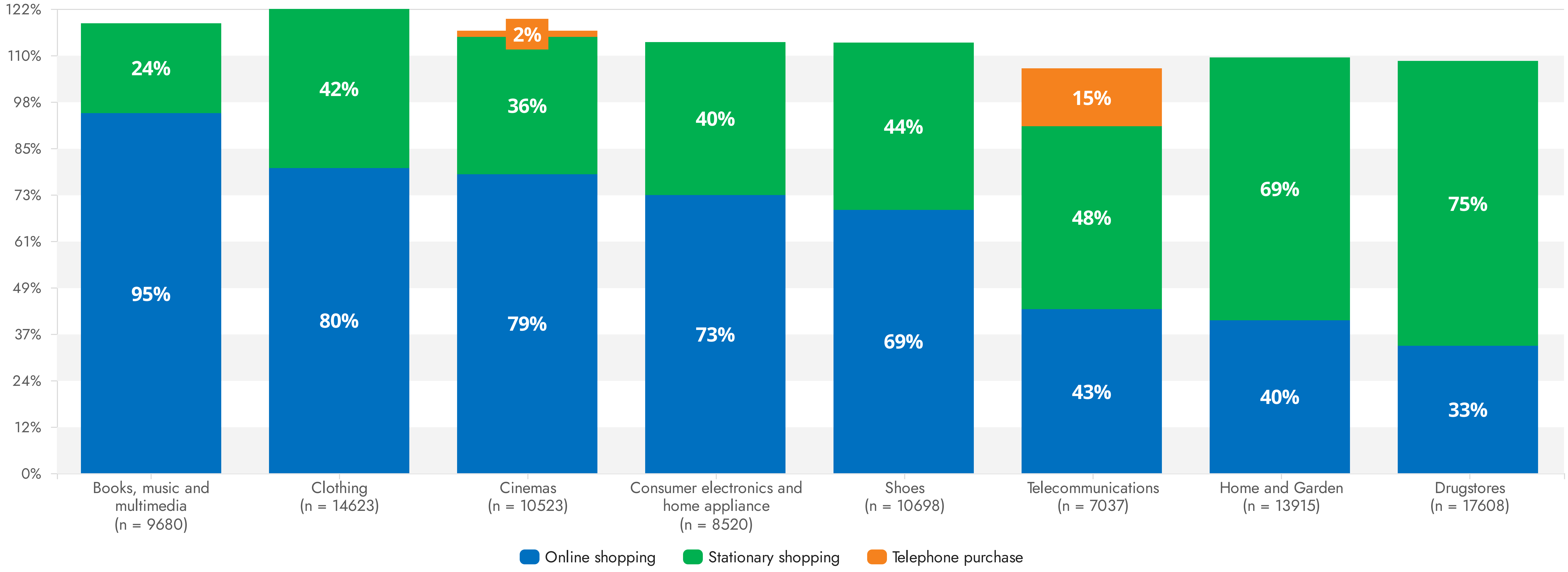
Purchasing channel of choice - Omnichannel 2023 with changes from 2022

n 2022 = 6767, 2023 = 5928

| | Online with home delivery | Online with pickup in store | Online in electronic form | Through a chat on the website | By telephone | In a stationary store | In a stationary store with home delivery | Result count |
|---|---|---|---|---|---|---|---|---|
| **Orange** | 26.2% +0.2pp | 6.4% -0.9pp | 18.1% +5.9pp | 0.8% +0.2pp | 14.3% +1.7pp | 35.6% -0.3pp | 4.7% -0.7pp | 1662 |
| **Play** | 19.9% -0.3pp | 5.3% +0.8pp | 11.5% +2.2pp | 1.5% +0.7pp | 12.3% +1.9pp | 51.5% +1pp | 4.5% +0.2pp | 1590 |
| **T-Mobile** | 24.6% +1.9pp | 5.1% +0.2pp | 10.8% | 1% | 13.7% +3pp | 47.4% -0.2pp | 3.2% +0.1pp | 1183 |
| **Plus** | 16.5% -0.4pp | 4.2% -0.9pp | 11.1% +2.3pp | 1.3% +0.6pp | 9.1% -0.8pp | 59.4% +3.5pp | 2.8% +0.1pp | 1112 |
| **UPC** | 27.9% +0.2pp | 2.9% +1.2pp | 15% -3.2pp | 1% -0.2pp | 32.8% +3.1pp | 16% +2.6pp | 9.2% +1.1pp | 412 |
| **Canal+** | 19.2% +6pp | 5.8% -1.1pp | 21.7% +0.6pp | 1.1% +0.4pp | 21.7% +1.4pp | 32.5% -1pp | 5.3% +1.1pp | 360 |
| **Polsat Box** | 17% +0.1pp | 6.7% +0.9pp | 16.3% +5.3pp | 2.5% +0.9pp | 9.6% +0.2pp | 52.8% +5.1pp | 4.3% -3.2pp | 282 |
| **Vectra** | 19.2% -3.5pp | 3.3% -3.7pp | 14.6% +1.7pp | 2.3% | 29.1% +6.1pp | 28.2% +7.9pp | 9.4% -2.3pp | 213 |

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

Comparison of channels chosen between industries



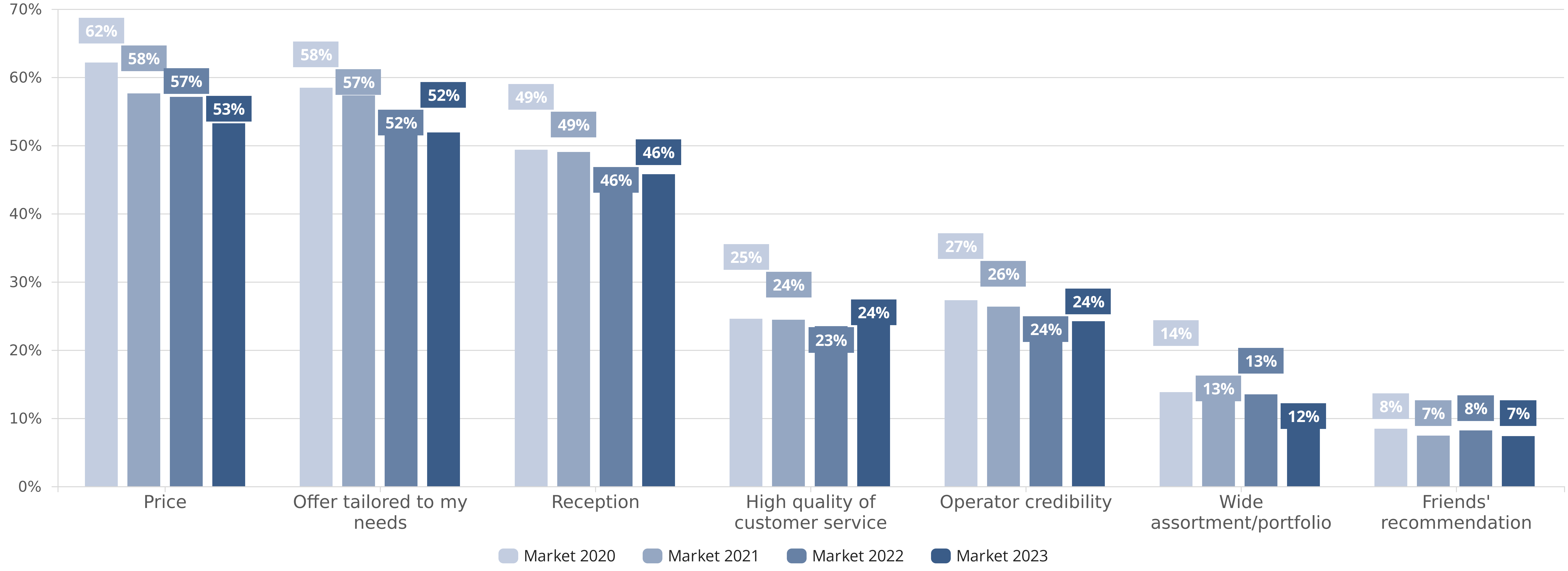



Comparing the methods of purchasing telecom products and services with the industries studied in Omnichannel 2023 shows how telephone sales still account for a large share, and how much room there is for growth in online sales.

# WHAT ELEMENTS ARE IMPORTANT TO YOU WHEN CHOOSING TELECOMMUNICATIONS SERVICES?

Multiple choice question

n 2020 = 6181, 2021 = 8775, 2022 = 8904, 2023 = 7595






For buyers, when choosing an operator, price is still most important, but its share is slowly and steadily declining.

# WHAT TELECOMMUNICATIONS SERVICES HAVE YOU RECENTLY PURCHASED

Multiple choice question

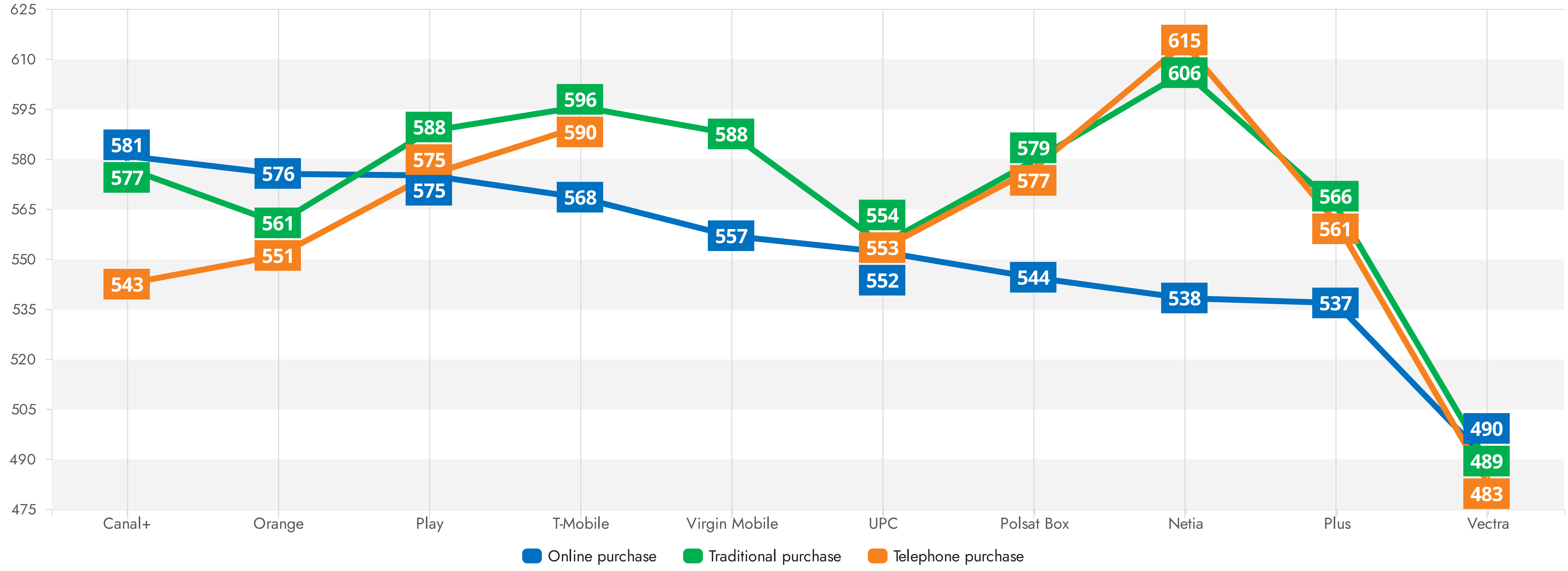
n 2022 = 5188, 2023 = 4581

| | Mobile subscription | Mix offer | Prepaid offer | TV | Mobile internet | Inter net | Combined offers (e.g. TV + internet + telephone subscription) | I don't remember/it's hard to say | L. of results |
|---|---|---|---|---|---|---|---|---|---|
| **Orange** | 39.7% -5.3pp | 5% +1.9pp | 10.6% -1.5pp | 6.9% +1pp | 13.4% -0.7pp | 19.1% +2.6pp | 23.4% -2.4pp | 12.1% +4.1pp | 6880 |
| **Play** | 54% -4pp | 5.1% -1.2pp | 11.5% | 5.6% +0.9pp | 21% +3.9pp | 7.7% +2.2pp | 7.7% -2.6pp | 11.7% +3pp | 4995 |
| **T-Mobile** | 55.1% -2.8pp | 5.2% -1.1pp | 9.7% -0.9pp | 4.6% +2.9pp | 21.7% +1.7pp | 10.9% +1pp | 9.4% +3.2pp | 9.6% -0.3pp | 3897 |
| **Plus** | 58.7% -0.1pp | 4.1% +0.2pp | 8.8% -0.2pp | 6.7% +0.1pp | 13.2% -2.2pp | 7.6% +1.2pp | 13% +0.6pp | 11.2% | 3382 |
| **UPC** | 3.8% -3.5pp | 1.3% | 2.5% +0.7pp | 29% +0.8pp | 7.3% -1.1pp | 45.7% +2pp | 36.3% -5.8pp | 9.8% +3.1pp | 2450 |
| **Canal+** | 4.3% -1.7pp | 2.9% +1pp | 1.8% -1.3pp | 74.7% +2.9pp | 4.3% -0.1pp | 3.2% +0.4pp | 5.8% -0.2pp | 11.6% -3.4pp | 1353 |
| **Polsat Box** | 12% +0.3pp | 2.9% +0.3pp | 2.9% +0.7pp | 57.9% +1.2pp | 6.2% -3.3pp | 10.5% +1.8pp | 16.3% -6.2pp | 8.1% -2.7pp | 1110 |
| **Vectra** | 7.8% -2.5pp | 2.6% -1pp | 2.6% -1pp | 41.6% +6.2pp | 11.7% +2pp | 39% -2pp | 22.1% -6.6pp | 10.4% +2.2pp | 1104 |
| **Netia** | 12.2% -1.6pp | 3.5% -0.3pp | 2.6% -0.5pp | 35.7% +1.1pp | 12.2% +3.7pp | 46.1% +4.6pp | 30.4% -1.9pp | 6.1% -1.6pp | 884 |
| **Virgin Mobile** | 39.6% -1.1pp | 6.3% +1.4pp | 29.2% +0.8pp | 6.3% +2.6pp | 20.8% +4.8pp | 4.2% -2pp | 6.3% +2.6pp | 14.6% -6.4pp | 218 |

# EXPERIENCE QUALITY INDICATORS

# YOUR CUSTOMER EXPERIENCE INDEX

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

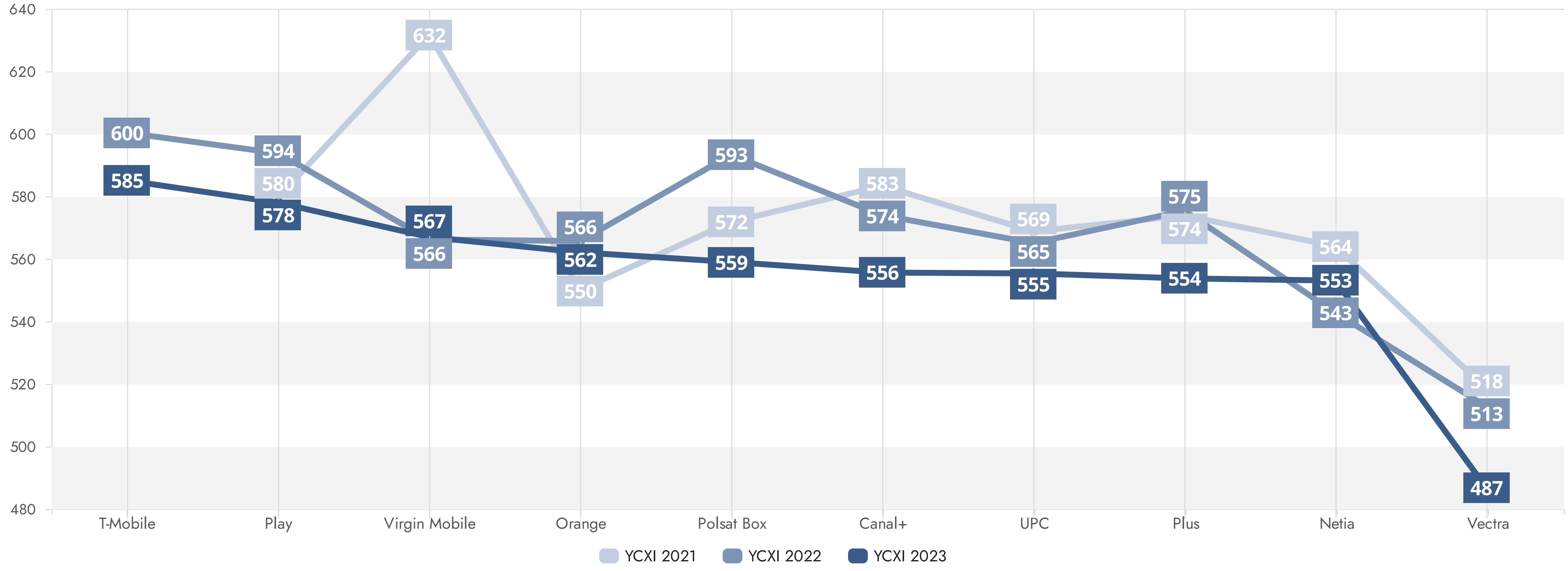





Depending on the operator, the survey respondents rank the sales channel assessment differently. Canal+ boasts the highest quality rating in the online channel, Netia the highest quality rating in the traditional sales channel and telephone sales.

# YOUR CUSTOMER EXPERIENCE INDEX

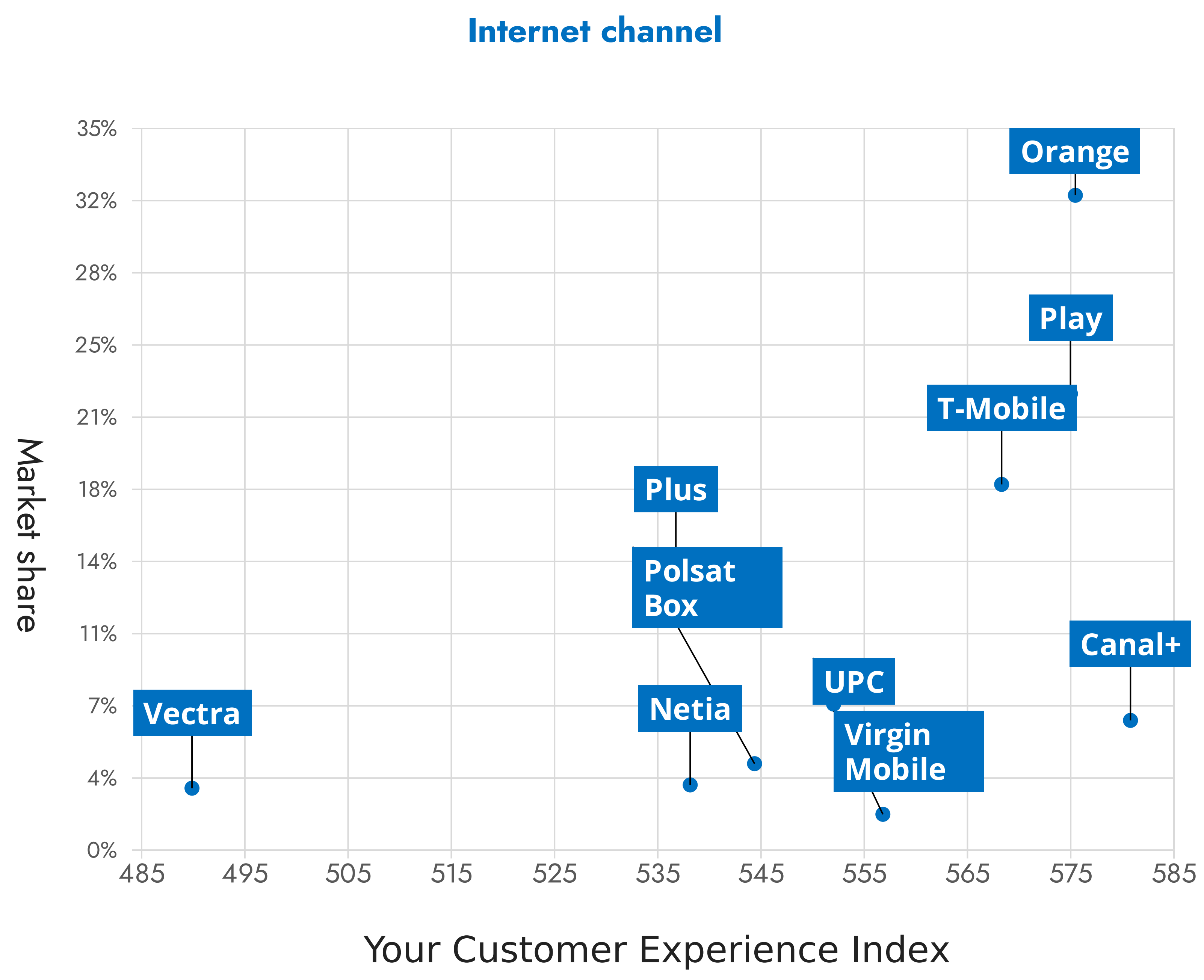
Quality index on a scale of 0 to 1000 taking into account four satisfaction factors:
availability and selection of products, ease of ordering, satisfaction with purchase, willingness to recommend the store to friends

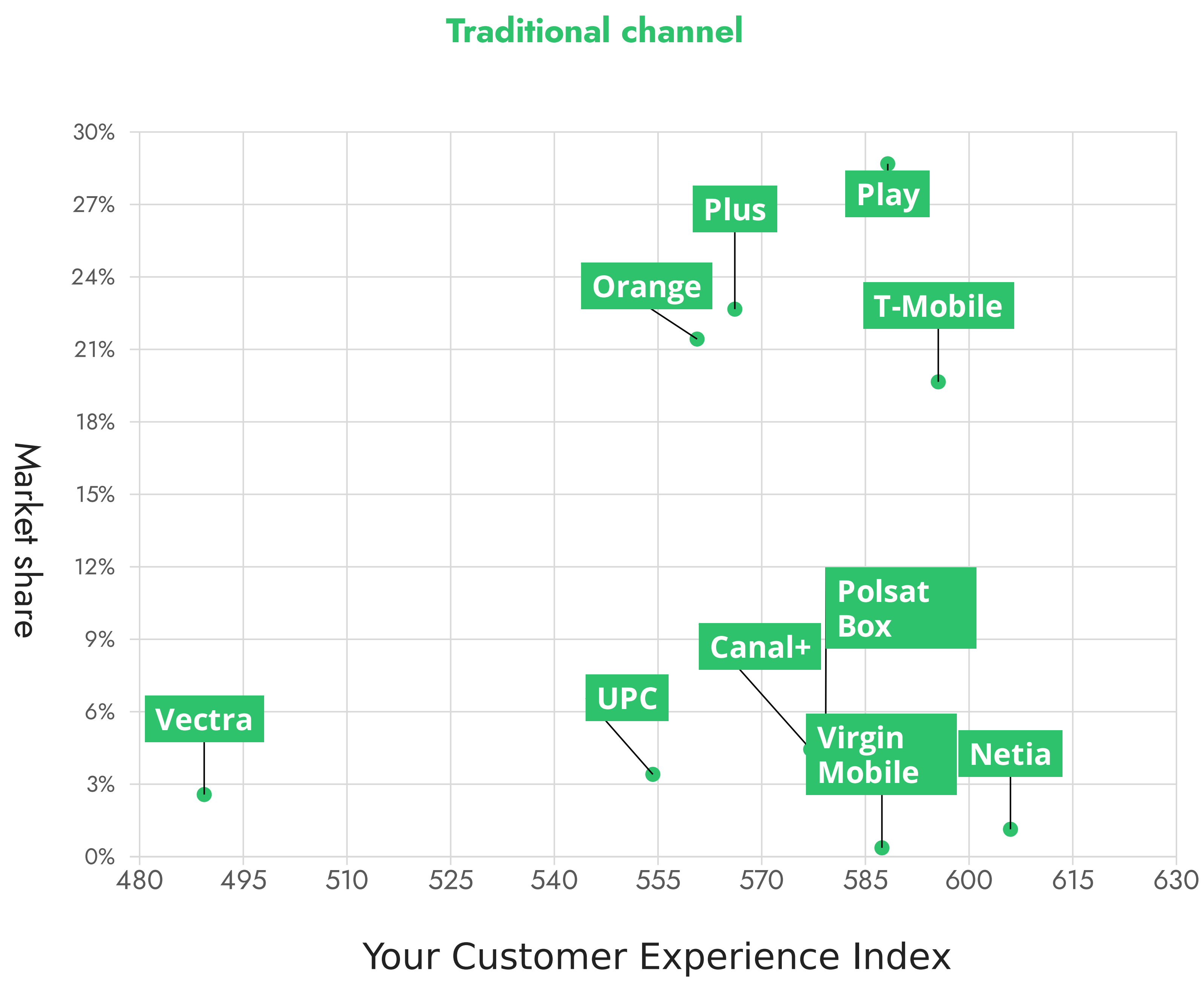





The Your Customer Experience Quality Index is designed to more easily differentiate companies scoring similarly on sub-questions as well as identify real quality leaders on a scale of 0 to 1,000. There is still potentially a lot of work to be done, since companies scored in the neighborhood of 550. The industry leaders are T-Mobile and Play.

# YOUR CUSTOMER EXPERIENCE INDEX



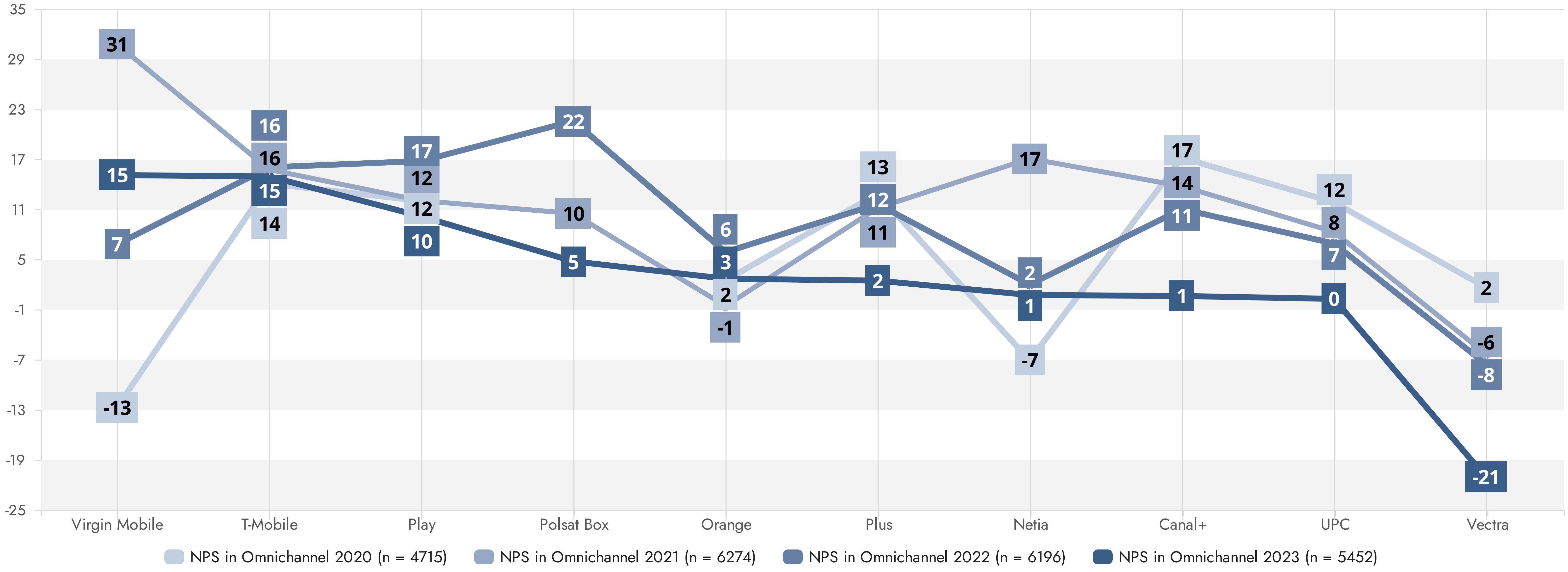






The charts show market shares by sales channel and Your Customer Experience Index value. The online channel is dominated by Orange with the largest market share and Canal+ with the highest index value. In the fixed-line channel, Play has the largest share, and the position of experience leader in this area is held by T-Mobile.

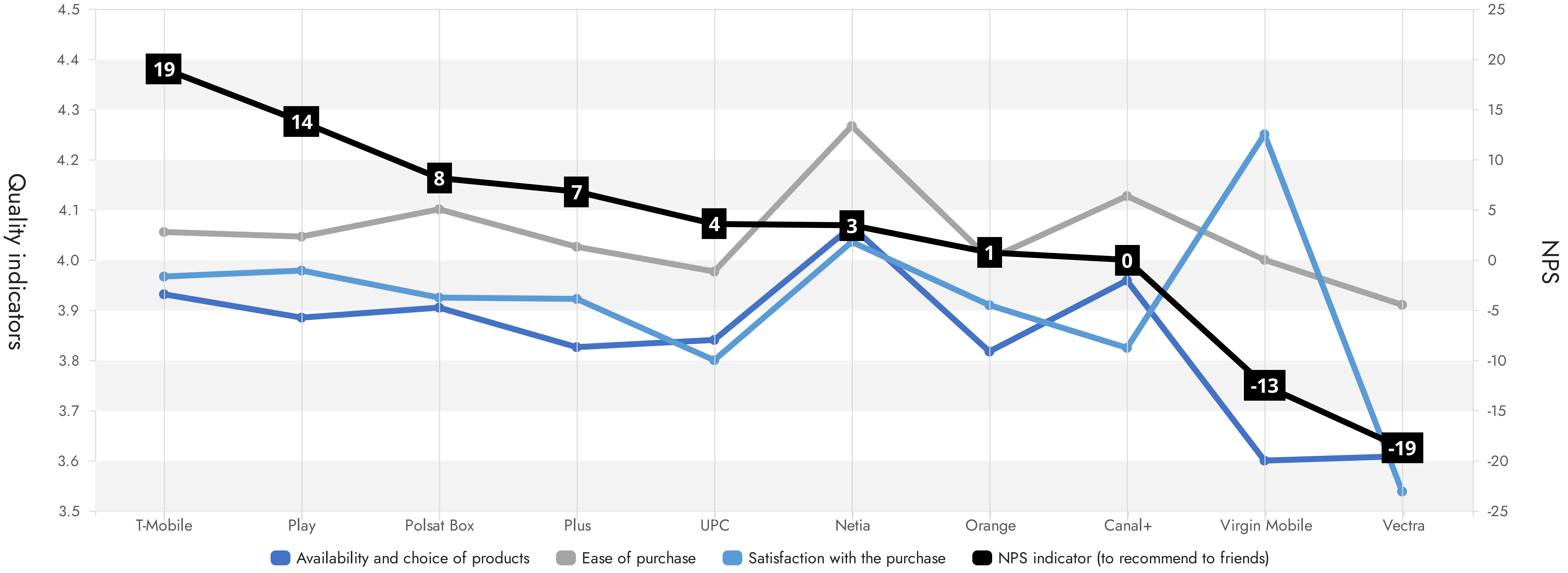
# HOW LIKELY ARE YOU TO RECOMMEND THESE OPERATORS TO YOUR FRIENDS?

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

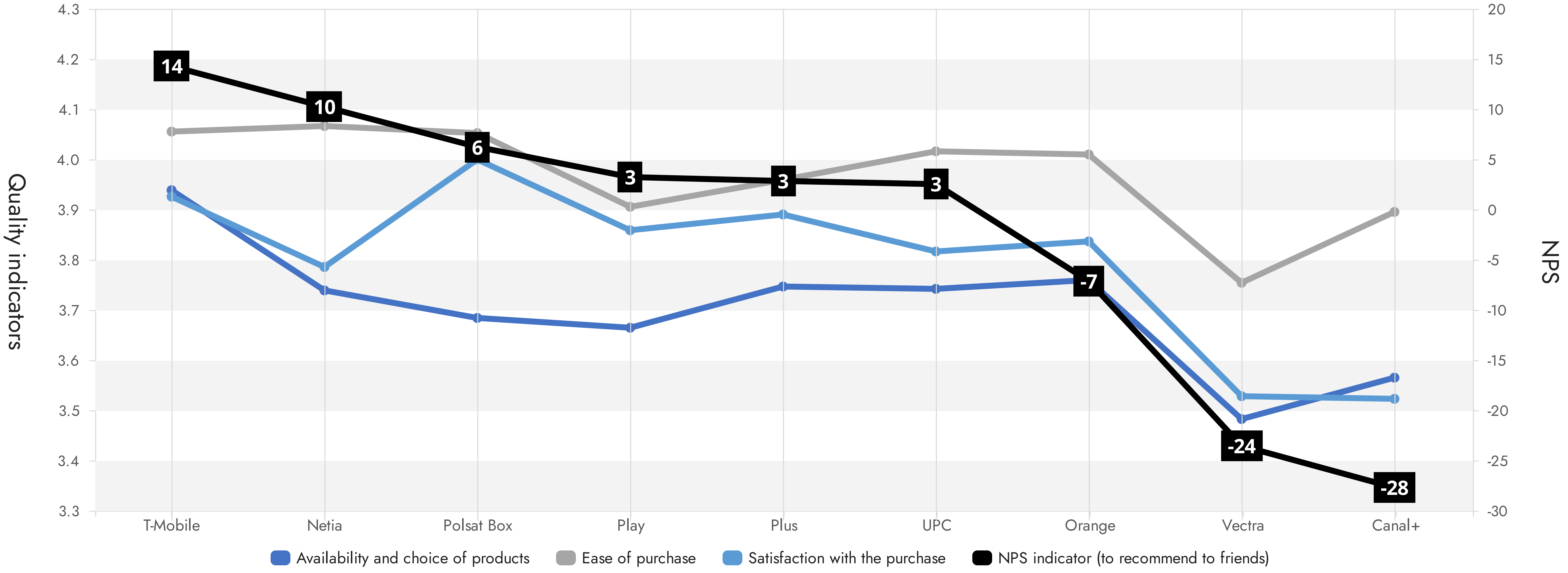





The highest NPS in the traditional channel is recorded for T-Mobile. Respondents rate Polsat Box and Plus similarly. The least recommended brand among the surveyed companies is Vectra.

# TELEPHONE CHANNEL - EXPERIENCE QUALITY RATINGS

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

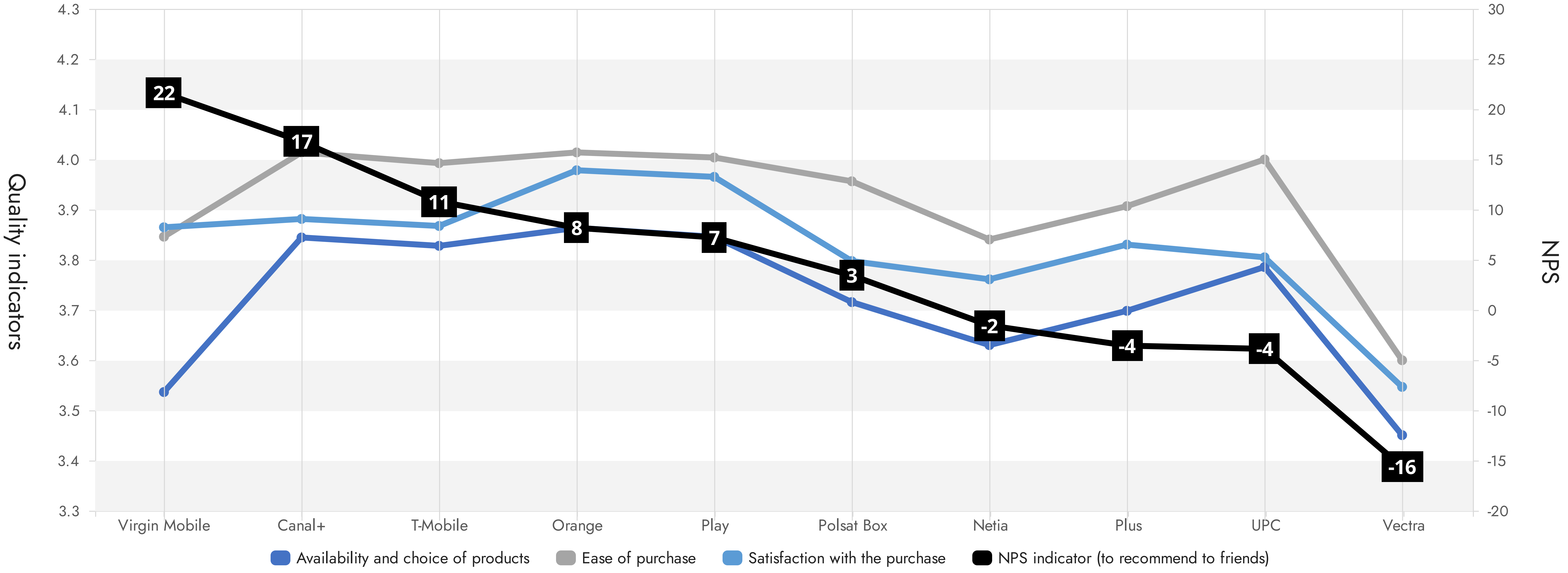





We record the highest NPS in the telephone sales channel for T-Mobile. The least readily recommended brand among the surveyed companies is Canal+, and we also record negative indicator values for Vectra and Orange.

# ONLINE CHANNEL - EXPERIENCE QUALITY RATINGS

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





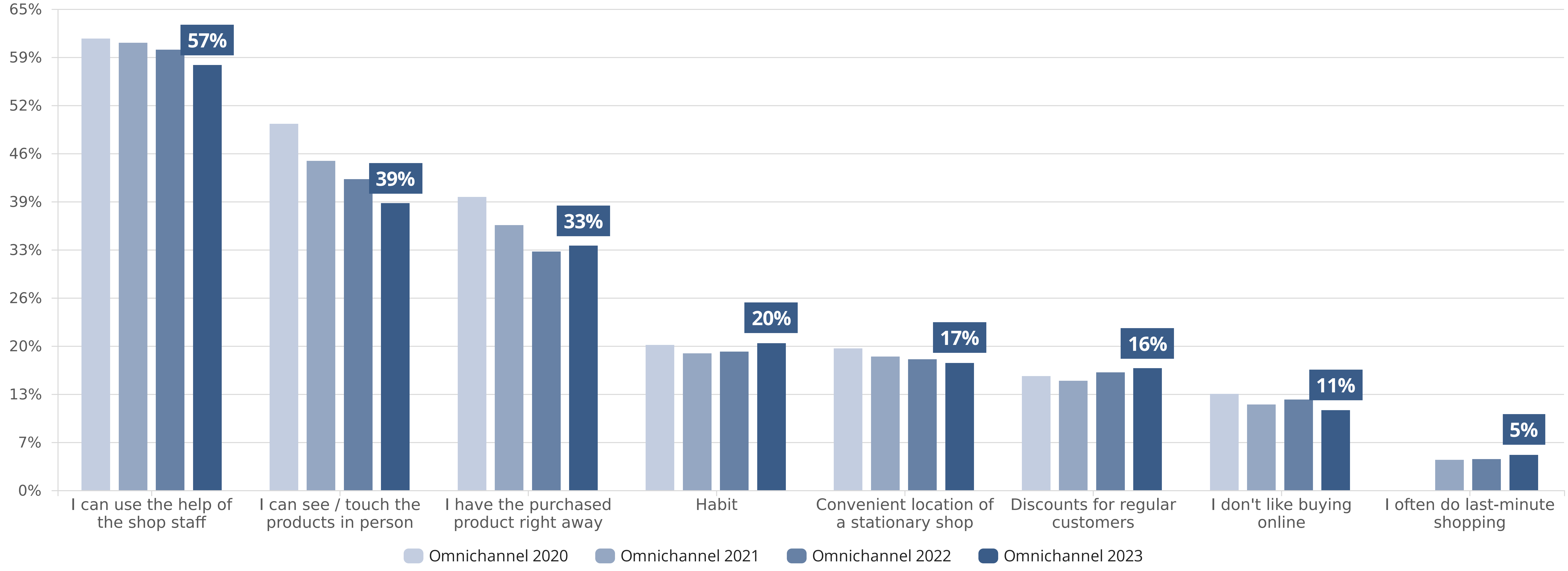

Virgin Mobile's network in the Internet channel has the highest NPS score, and Vectra again has the lowest.

# SHOPPING PREFERENCES IN THE STATIONARY CHANNEL

# WHY DO YOU PREFER TO SHOP FOR TELECOMMUNICATIONS SERVICES OR PRODUCTS AT A STATIONARY SHOWROOM?

Traditional channel - Multiple choice question

n 2020 = 2086, 2021 = 3363, 2022 = 3073, 2023 = 2446




The importance of being able to get service assistance and see the product live is declining, discounts for regular customers and the fact that the buyer has the product/service right away are gaining in importance.

# WHY DO YOU PREFER TO SHOP FOR TELECOMMUNICATIONS SERVICES OR PRODUCTS AT A STATIONARY SHOWROOM?

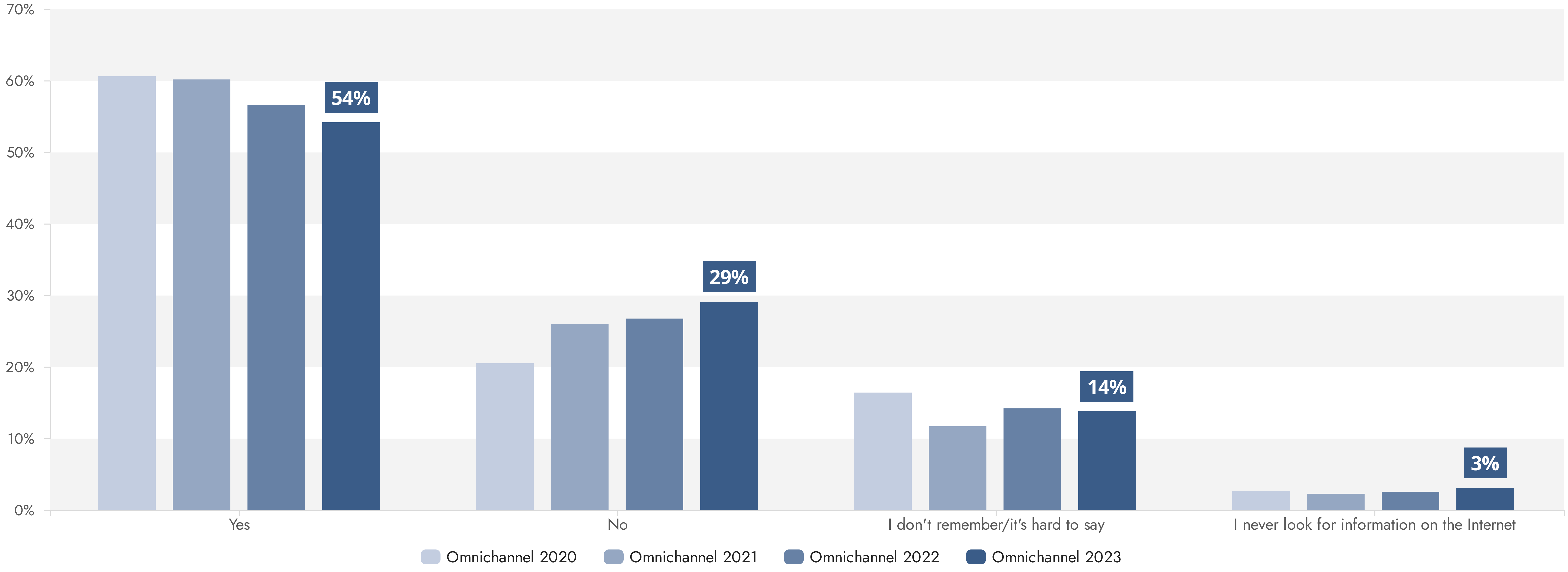
Traditional channel - Multiple choice question

| | I can use the help of the shop staff | I can see / touch the products in person | I have the purchased product right away | Habit | Convenient location of a stationary shop | Discounts for regular customers | I don't like buying online | I often do last-minute shopping | Result count |
|---|---|---|---|---|---|---|---|---|---|
| **I can use the help of the shop staff** | | 42.95% | 38.6% | 15.24% | 18.73% | 17.02% | 9.9% | 3.63% | 1404 |
| **I can see / touch the products in person** | 63.61% | | 44.62% | 14.45% | 20.99% | 19.3% | 10.34% | 3.9% | 948 |
| **I have the purchased product right away** | 67.08% | 52.35% | | 18.32% | 23.76% | 21.04% | 10.4% | 4.33% | 808 |
| **Habit** | 44.12% | 28.25% | 30.52% | | 18.76% | 15.46% | 9.9% | 5.15% | 485 |
| **Convenient location of a stationary shop** | 62.62% | 47.38% | 45.71% | 21.67% | | 24.52% | 13.1% | 4.29% | 420 |
| **Discounts for regular customers** | 59.31% | 45.41% | 42.18% | 18.61% | 25.56% | | 8.93% | 4.47% | 403 |
| **I don't like buying online** | 52.65% | 37.12% | 31.82% | 18.18% | 20.83% | 13.64% | | 3.03% | 264 |
| **I often do last-minute shopping** | 43.97% | 31.9% | 30.17% | 21.55% | 15.52% | 15.52% | 6.9% | | 116 |

# BEFORE YOUR LAST PURCHASE OF TELECOMMUNICATIONS SERVICES OR PRODUCTS AT A LANDLINE STORE, DID YOU LOOK FOR INFORMATION ON THE INTERNET?

Traditional channel - Multiple choice question

n 2020 = 1722, 2021 = 2192, 2022 = 2067, 2023 = 1791

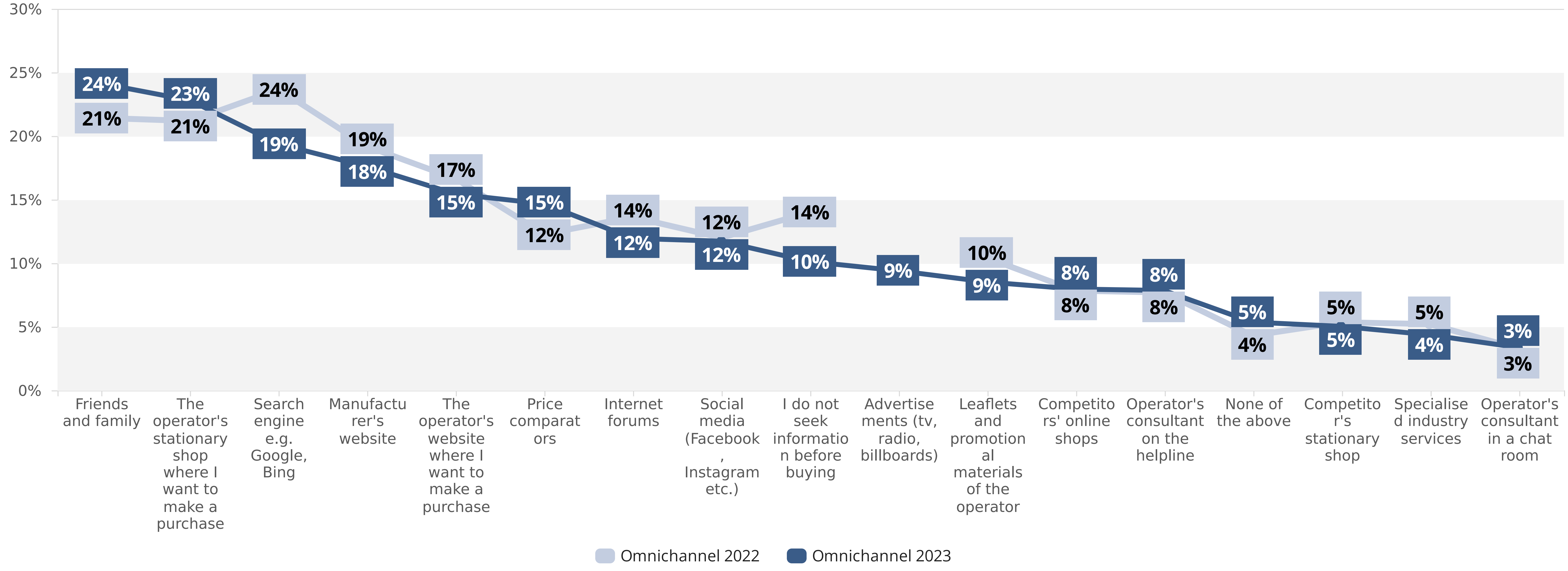



We are seeing an increase in the share of people who do not look online for information about a service or to compare it with others before making a purchase, or never do so.

# WHERE DO YOU GET INFORMATION ABOUT TELECOMMUNICATIONS SERVICES OR PRODUCTS BEFORE BUYING?

Traditional channel - Multiple choice question

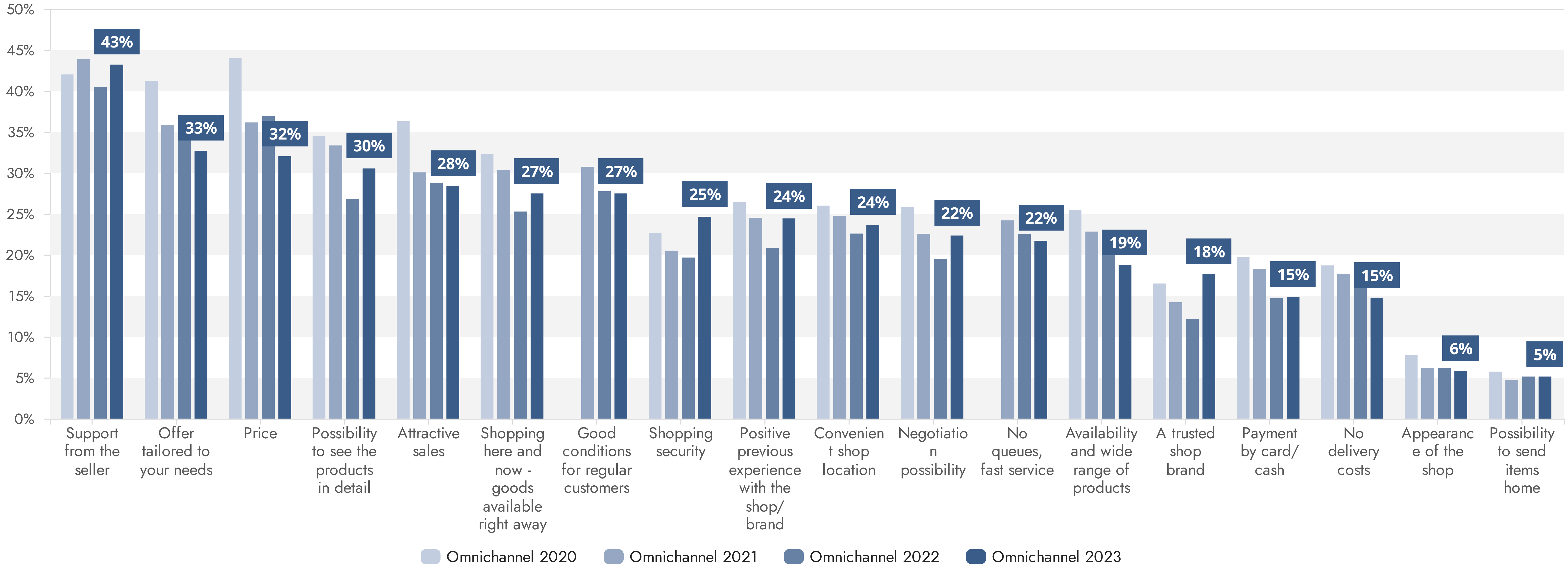
n 2022 = 2091, 2023 = 1807



# WHAT IS MOST IMPORTANT TO YOU WHEN SHOPPING FOR TELECOMMUNICATIONS SERVICES AND PRODUCTS AT A LANDLINE STORE?

Traditional channel - Multiple choice question

n 2020 = 1312, 2021 = 1771, 2022 = 1640, 2023 = 1410



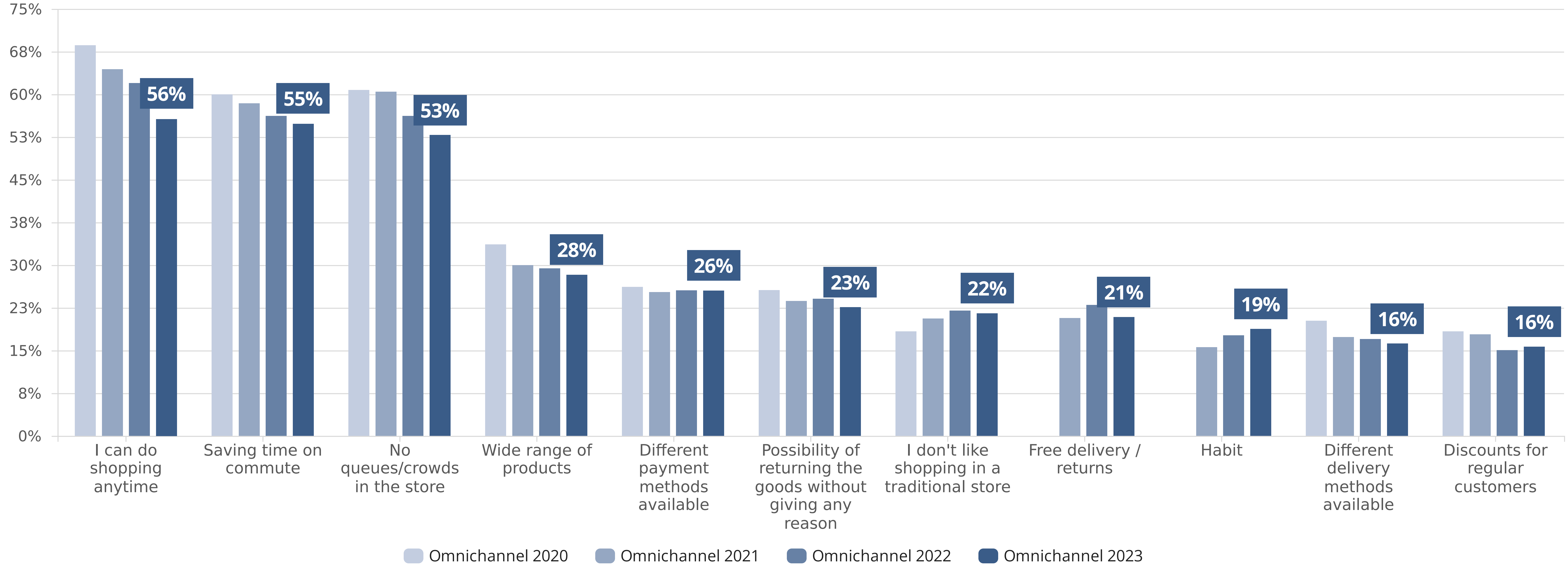

We observe a different distribution of responses relative to last year. From year to year, price is less and less important, and respondents focus on peri-purchase factors like seller support and flexible offerings. We note an increasing share for the answers shopping security and trusted store brand.

# SHOPPING PREFERENCES IN THE ONLINE CHANNEL

# WHY DO YOU PREFER TO PURCHASE TELECOMMUNICATIONS SERVICES OR PRODUCTS FROM AN ONLINE STORE?

Internet channel - Multiple choice question

n 2020 = 1009, 2021 = 1534, 2022 = 1691, 2023 = 1400

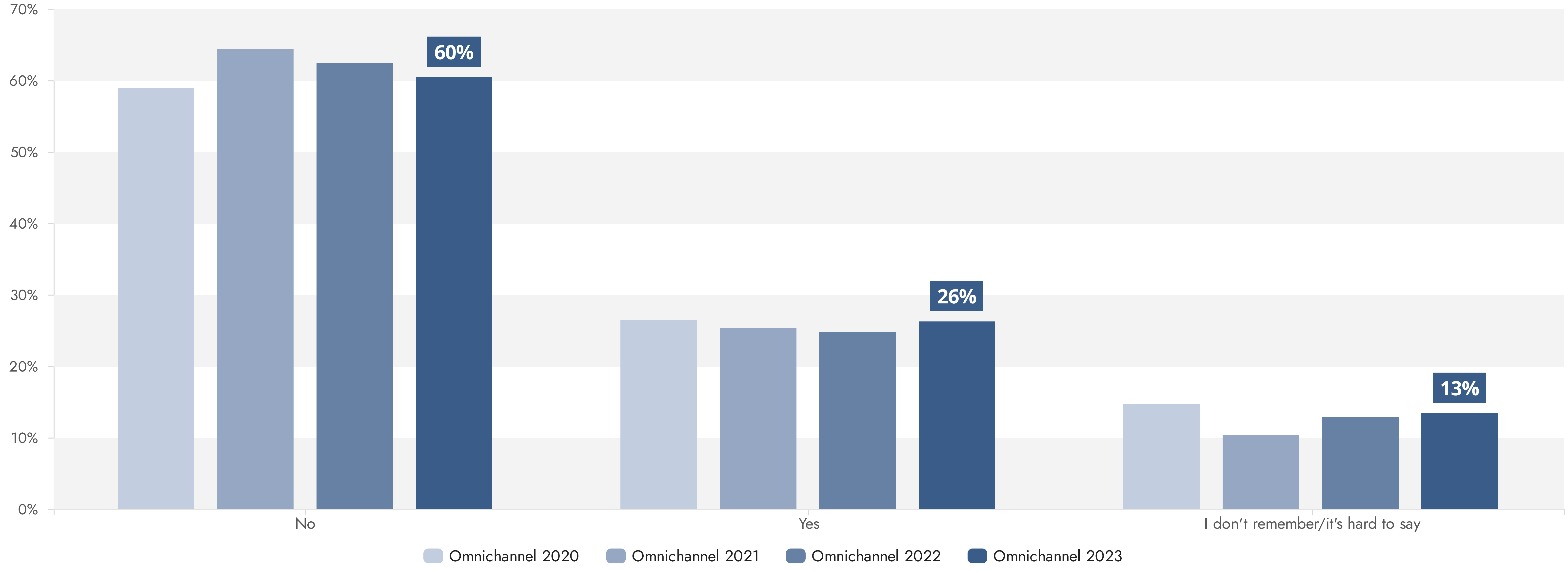



In most cases, we see a decrease in the share of indications compared to last year. It is possible that most categories are treated as a normality that we pay less and less attention to.

# BEFORE THE LAST TIME YOU PURCHASED TELECOMMUNICATIONS SERVICES ONLINE, DID YOU VISIT LANDLINE STORES TO REVIEW THE OFFER OR PRODUCT?

Internet channel - One-choice question

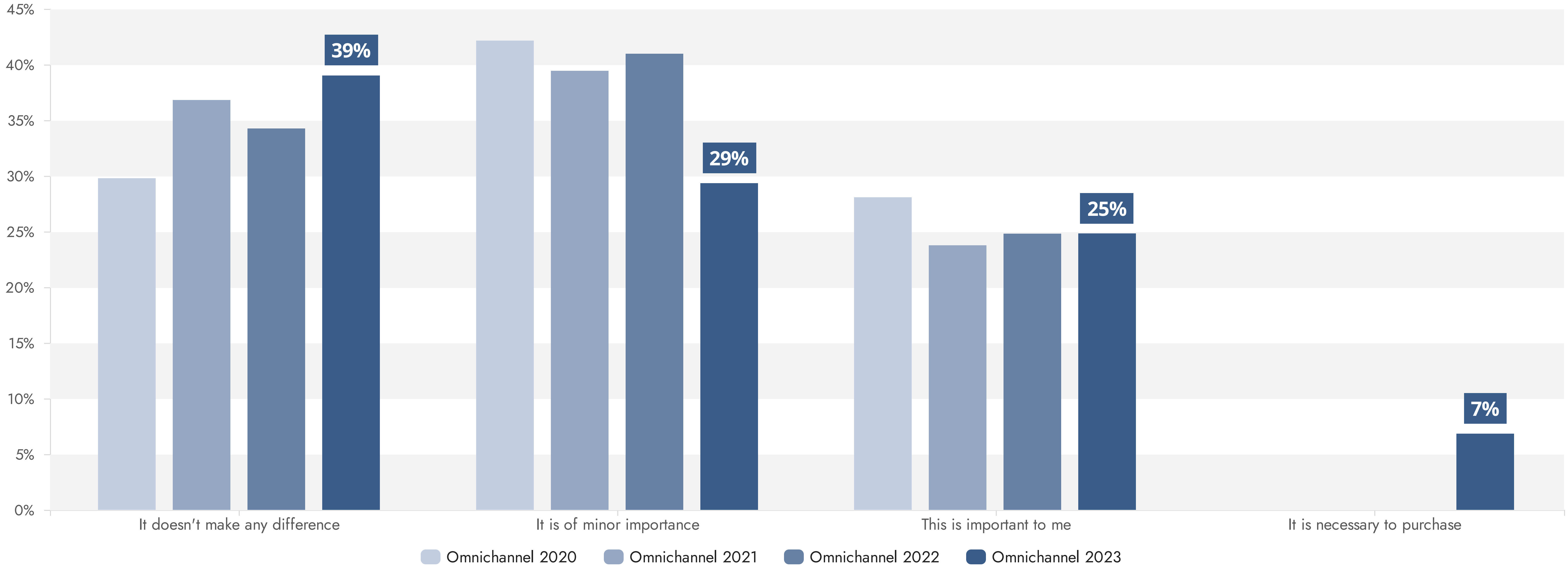
n 2020 = 1269, 2021 = 1851, 2022 = 1748, 2023 = 1543



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

Internet channel - One-choice question

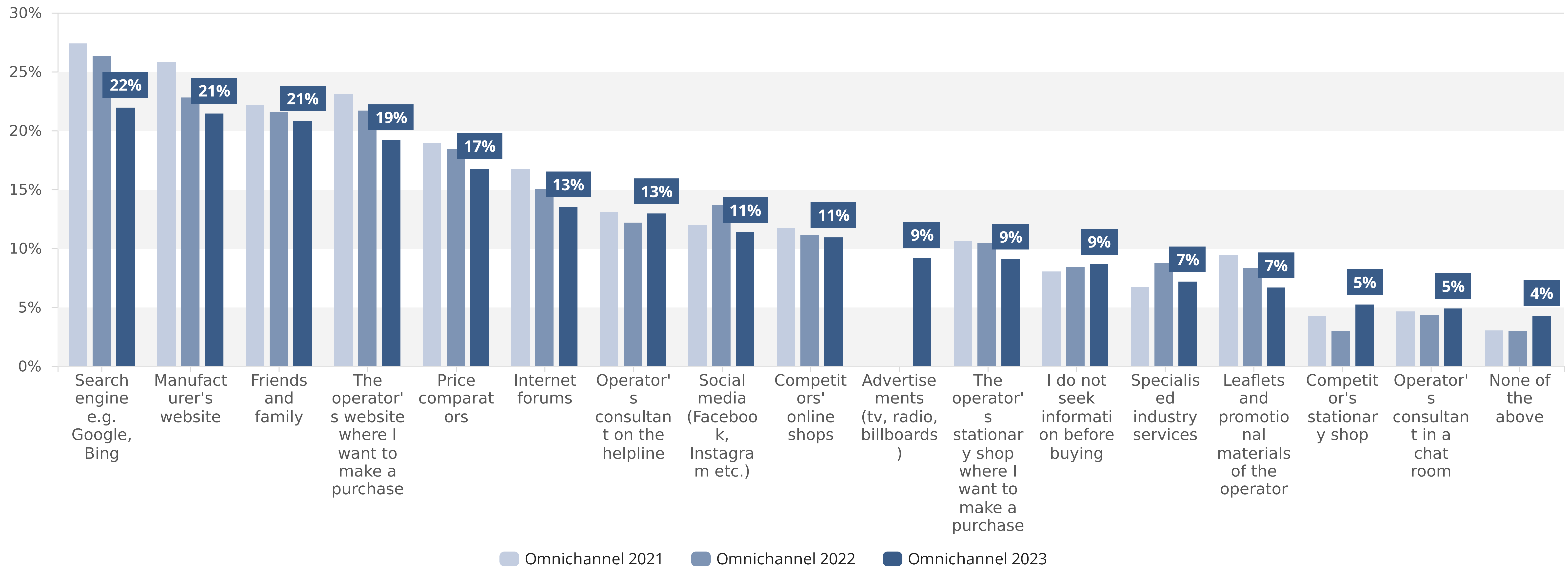
n 2020 = 1229, 2021 = 1818, 2022 = 1714, 2023 = 1479



# WHERE DO YOU GET INFORMATION ABOUT TELECOMMUNICATIONS SERVICES OR PRODUCTS BEFORE BUYING?

Internet channel - Multiple choice question

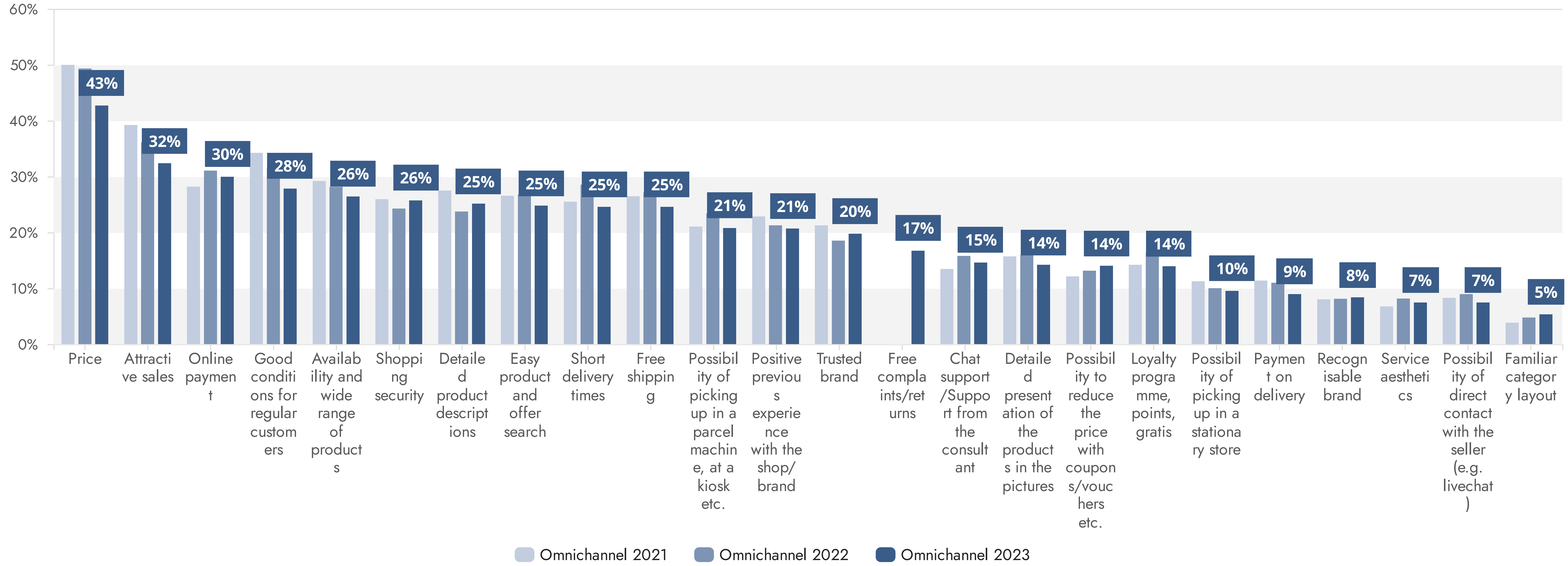
n 2021 = 1859, 2022 = 1808, 2023 = 1578



# WHAT IS MOST IMPORTANT TO YOU WHEN SHOPPING FOR TELECOMMUNICATIONS SERVICES FROM AN ONLINE STORE?

Internet channel - Multiple choice question

n 2021 = 1459, 2022 = 1312, 2023 = 1186

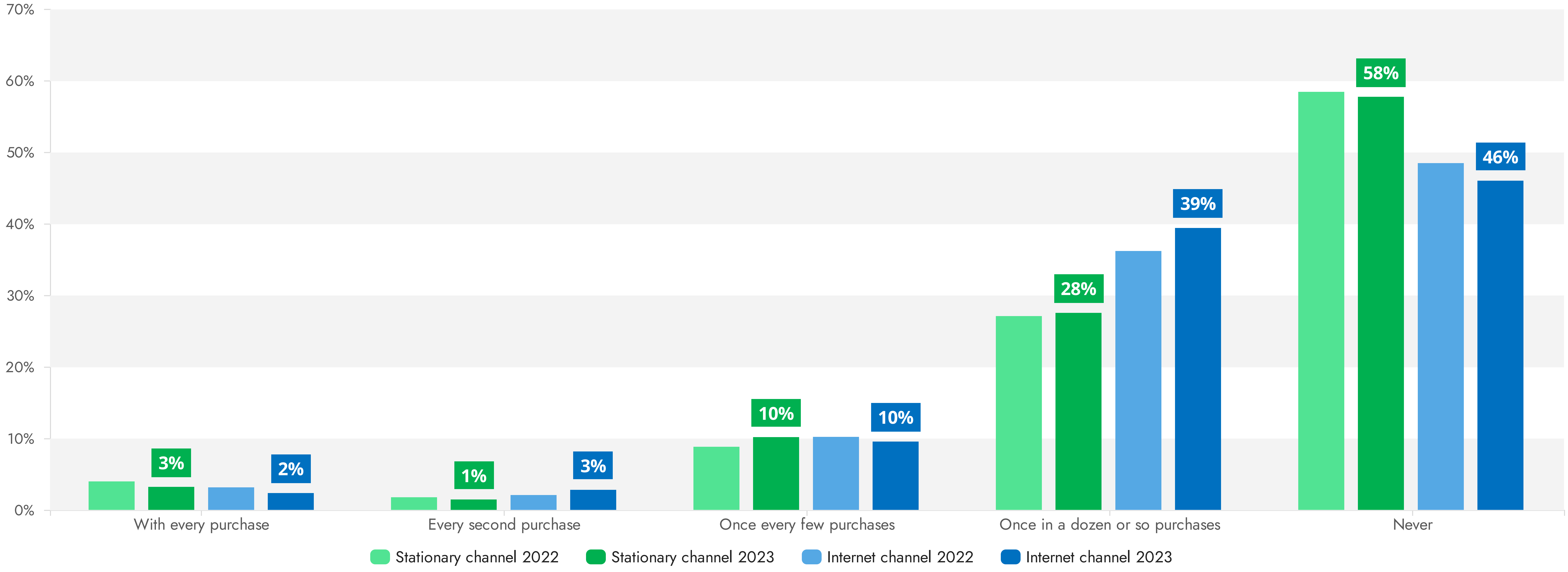


# POST-PURCHASE EXPERIENCE

# HOW OFTEN DO YOU FIND YOURSELF RETURNING TELECOMMUNICATIONS SERVICES (COMPLAINT/RETURN/EXCHANGE)?

Single-choice question

n fixed channel 2022 = 1611, 2023 = 1381, internet channel 2022 = 1208, 2023 = 1072



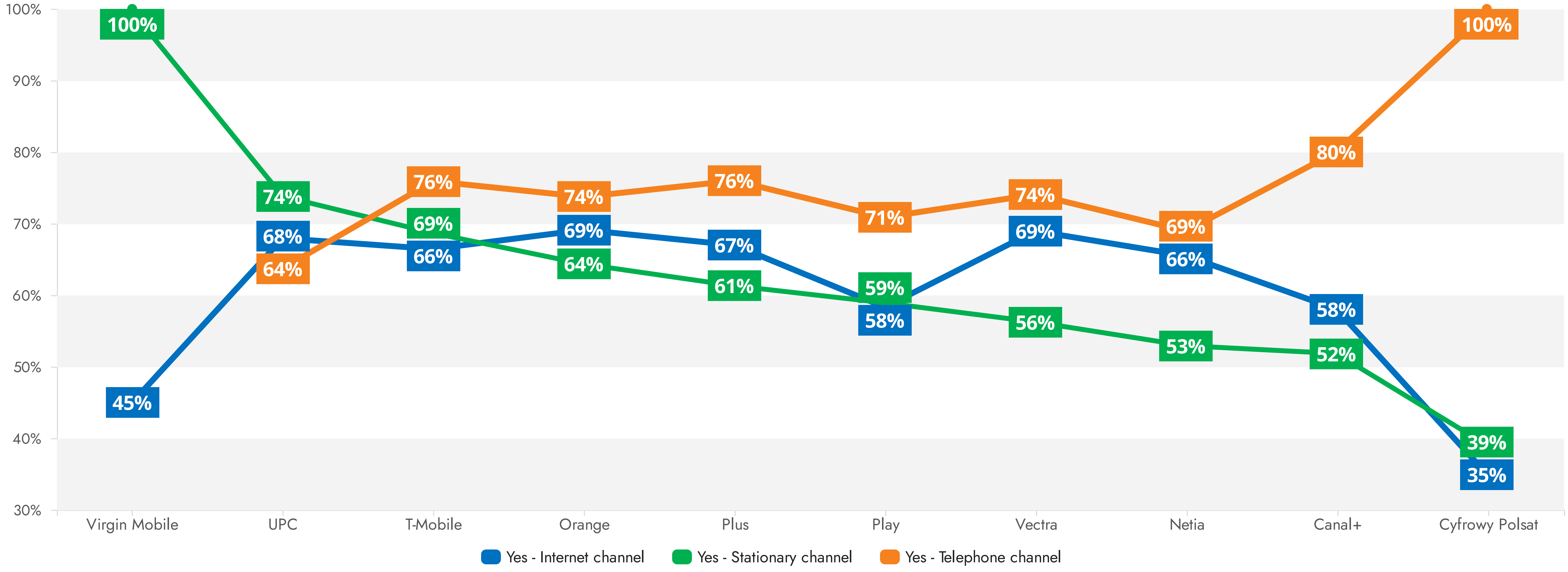



The share of returns for purchased telecommunications products and services is higher for the online channel than for the landline channel - a trend that has continued since last year's survey.

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

Analysis of Customers in Contact with Customer Service by Purchase Channel

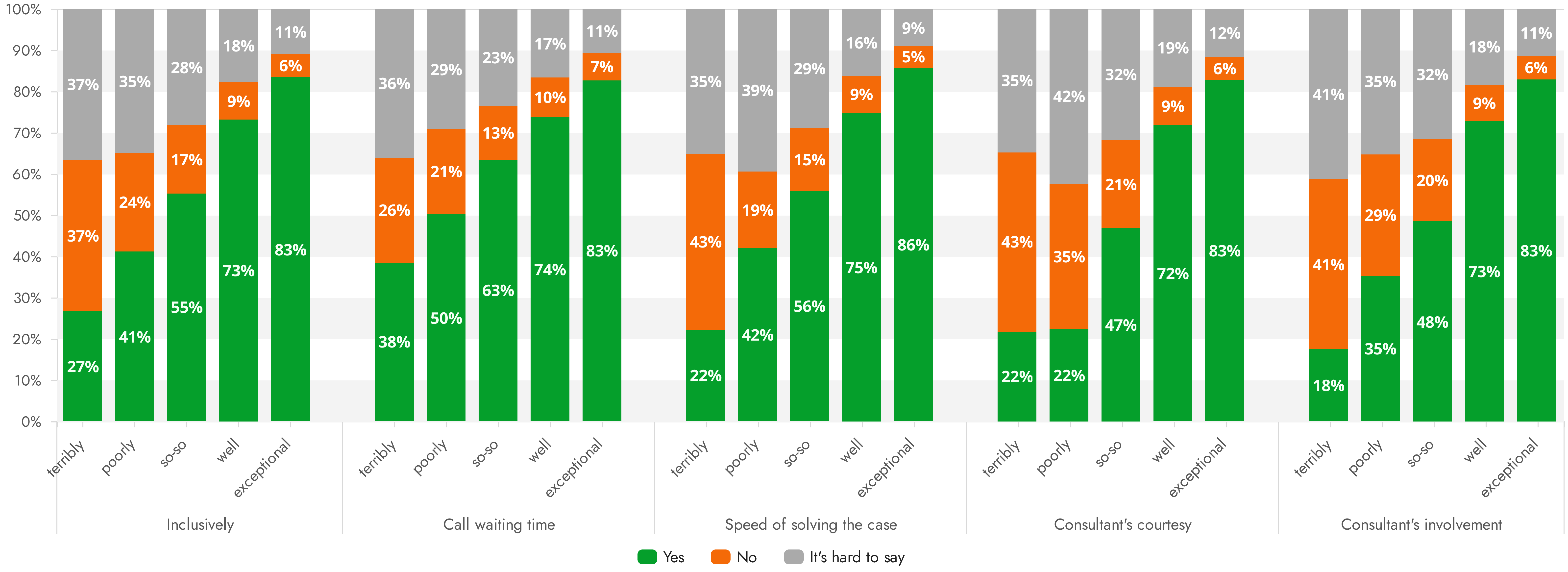
n online channel = 965, traditional channel = 1246, phone channel = 343



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

Single-choice matrix question

n = 2291




| | | Yes | No | It's hard to say |
|---|---|---|---|---|
| Inclusively | terribly | 27% | 37% | 37% |
| Inclusively | poorly | 41% | 24% | 35% |
| Inclusively | so-so | 55% | 17% | 28% |
| Inclusively | well | 73% | 9% | 18% |
| Inclusively | exceptional | 83% | 6% | 11% |
| Call waiting time | terribly | 38% | 26% | 36% |
| Call waiting time | poorly | 50% | 21% | 29% |
| Call waiting time | so-so | 63% | 13% | 23% |
| Call waiting time | well | 74% | 10% | 17% |
| Call waiting time | exceptional | 83% | 7% | 11% |
| Speed of solving the case | terribly | 22% | 43% | 35% |
| Speed of solving the case | poorly | 42% | 19% | 39% |
| Speed of solving the case | so-so | 56% | 15% | 29% |
| Speed of solving the case | well | 75% | 9% | 16% |
| Speed of solving the case | exceptional | 86% | 5% | 9% |
| Consultant's courtesy | terribly | 22% | 43% | 35% |
| Consultant's courtesy | poorly | 22% | 35% | 42% |
| Consultant's courtesy | so-so | 47% | 21% | 32% |
| Consultant's courtesy | well | 72% | 9% | 19% |
| Consultant's courtesy | exceptional | 83% | 6% | 12% |
| Consultant's involvement | terribly | 18% | 41% | 41% |
| Consultant's involvement | poorly | 35% | 29% | 35% |
| Consultant's involvement | so-so | 48% | 20% | 32% |
| Consultant's involvement | well | 73% | 9% | 18% |
| Consultant's involvement | exceptional | 83% | 6% | 11% |

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 order, the consultant's politeness, the time it takes to resolve the matter then the consultant's commitment and the time it takes to wait for a call.

## 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

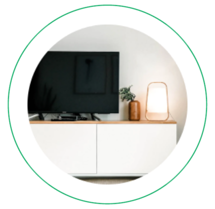

Drugstores


Footwear


Pharmacies


Telecommunicati


Home and garden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