YourCX

REPORT

OMNI CHA NNEL 2023

REPORT

OMNI CHA NNEL 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

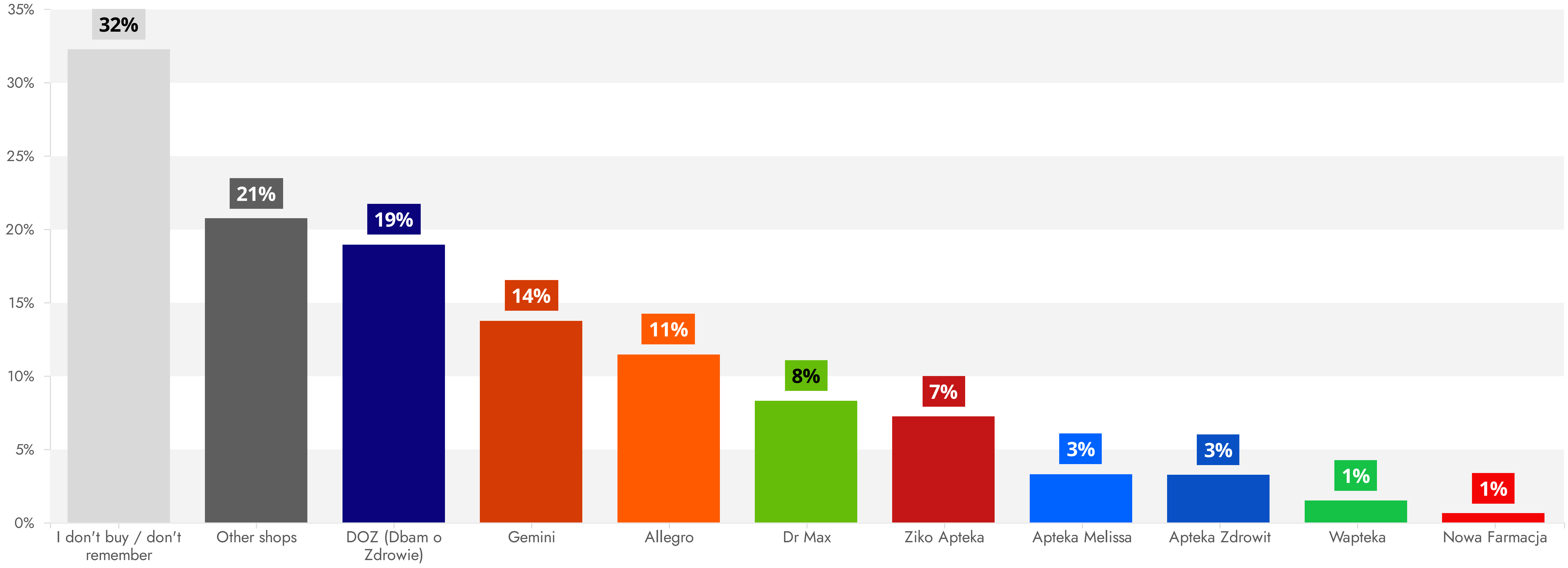
EXAMPLES OF CALCULATIONS FOR COMPANY XYZ

	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 MEDICATIONS OR DIETARY SUPPLEMENTS?

Multiple choice question

n = 11108

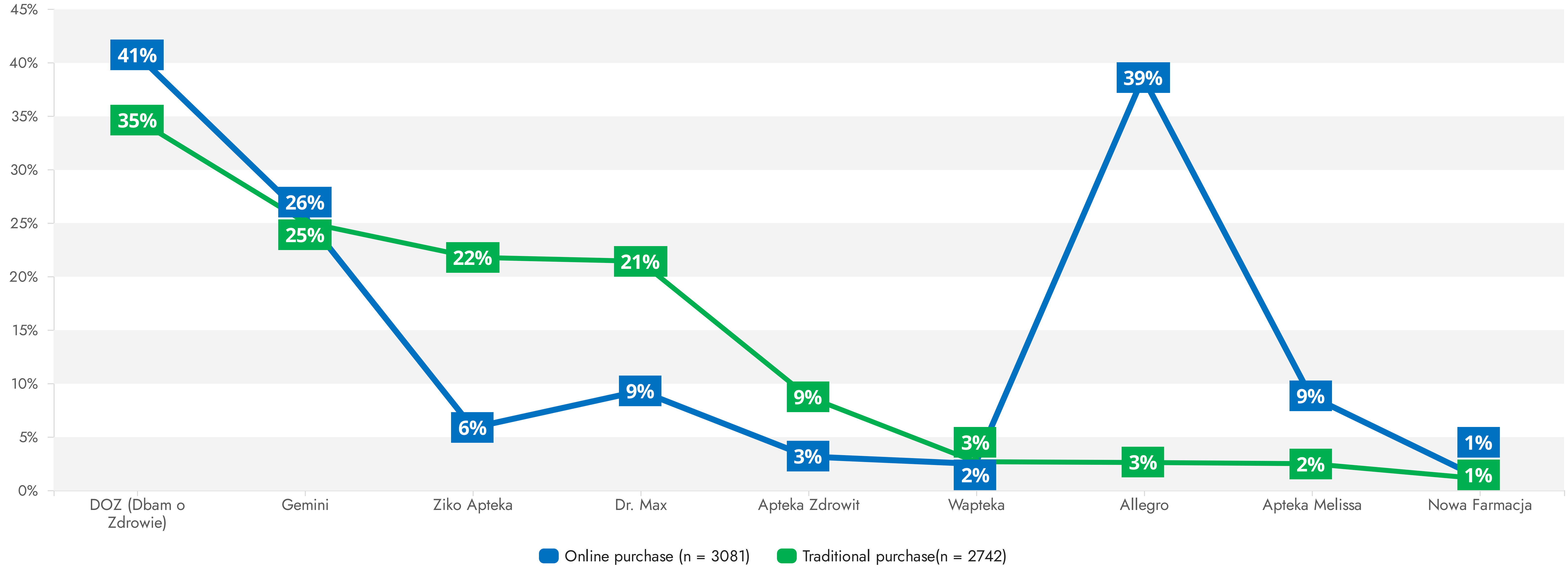


Respondents most often say they buy drugs and dietary supplements at a pharmacy from the Dbam o Zdrowie chain, followed by Gemini and, in turn, Allegro. Other brands did not exceed 15% of respondents' indications. One in three respondents declare that they do not buy or do not remember buying from this category. The results are aggregated for all shopping channels (online and traditional shopping combined).

WHERE HAVE YOU RECENTLY PURCHASED MEDICATIONS OR DIETARY SUPPLEMENTS?

Market shares by purchase channel

n online purchase = 3081, stationary purchase = 2742

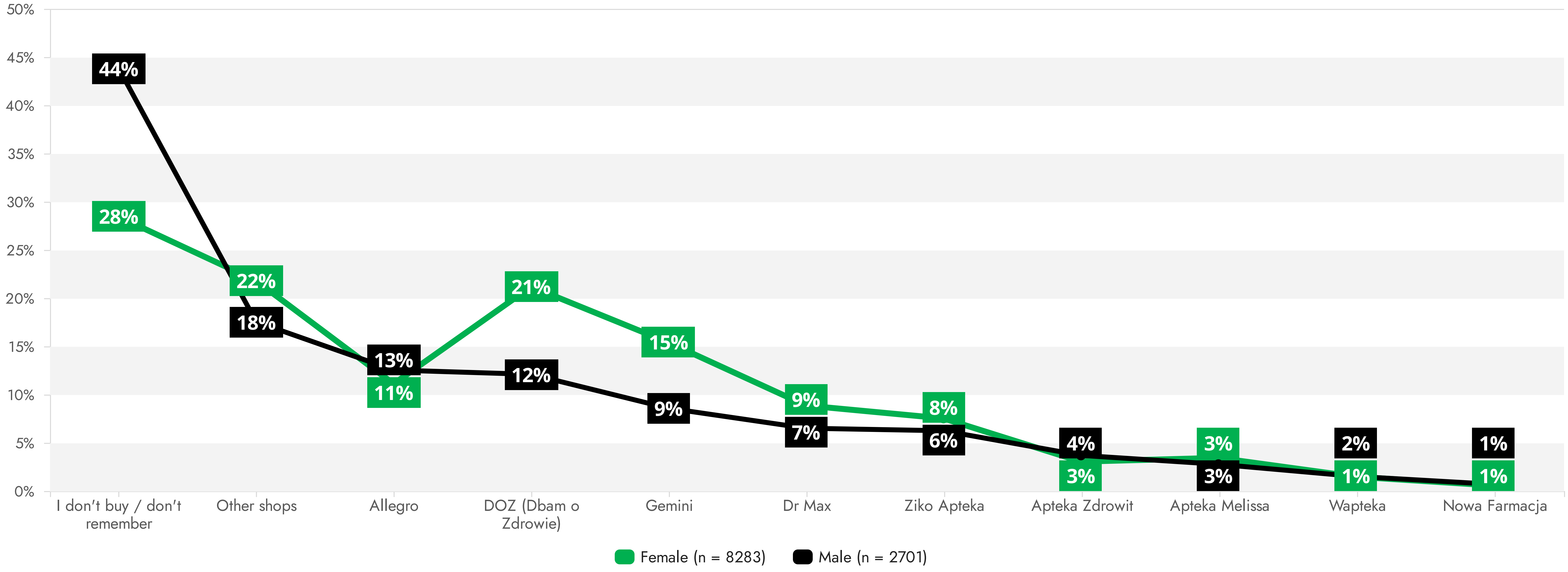


The leader in sales of medicines and dietary supplements is the Dbam o Zdrowie chain, in the online channel slightly less indications are observed for Allegro, while in stationary sales the second place is held by Gemini, with a slightly smaller share held by Ziko Apteka and Dr. Max.

WHERE HAVE YOU RECENTLY PURCHASED MEDICATIONS OR DIETARY SUPPLEMENTS?

Analysis by gender

n = 10984



Men are more likely to choose to buy from Allegro, while women's declarations indicate that they most often choose to buy from DOZ and Gemini (far more often than men). 44% of men and 28% of women do not buy pharmacy products.

WHERE HAVE YOU RECENTLY PURCHASED MEDICATIONS OR DIETARY SUPPLEMENTS?

Analysis by province

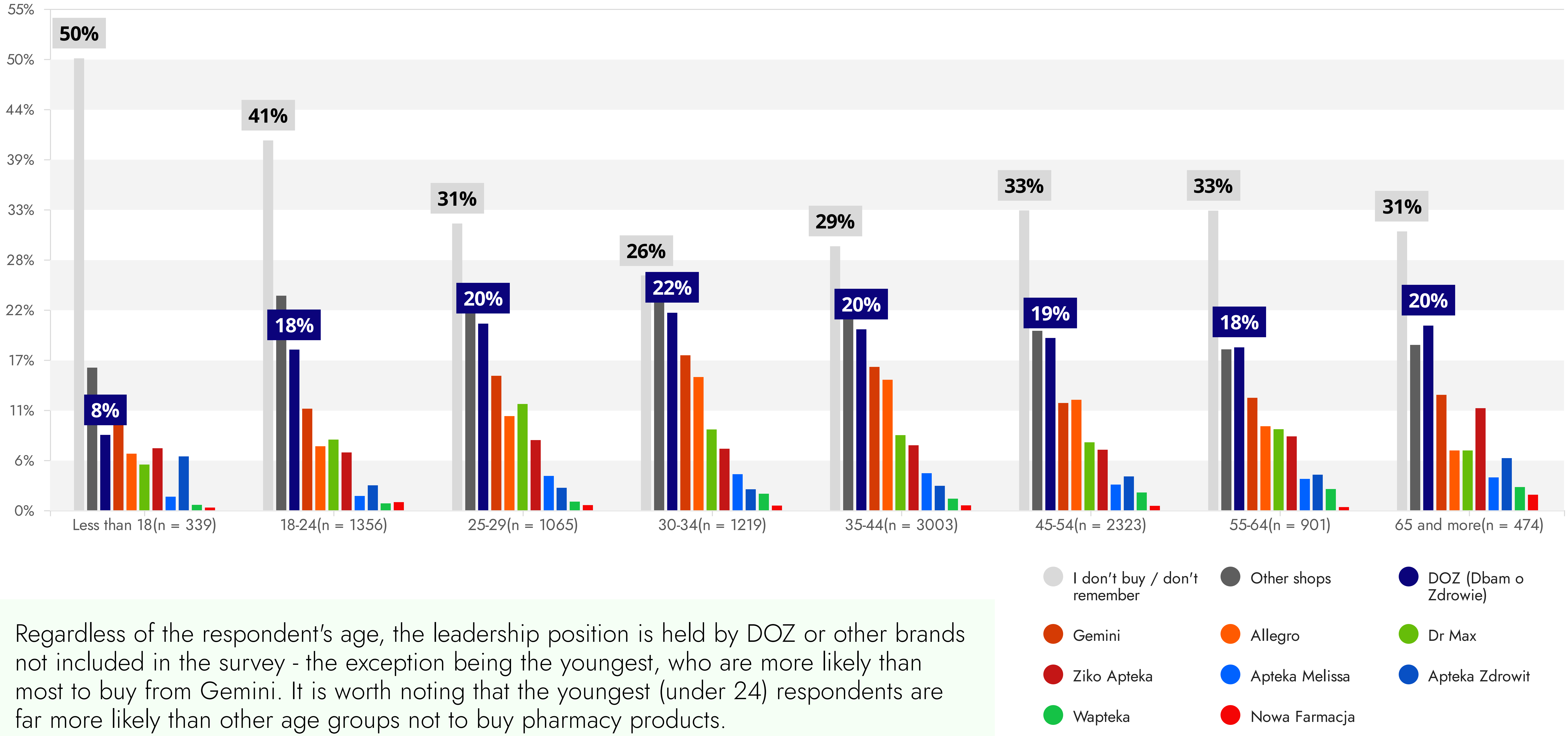
n = 10020

	I don't buy / don't remember	Other stores	DOZ (Dbam o Zdrowie)	Gemini	Allegro	Dr Max	Ziko Apteka	Apteka Melissa	Apteka Zdrowit	Waptek a	Nowa Farmacja	Result count
województwo mazowieckie	31.7%	21.2%	19.6%	11.5%	11.3%	7.6%	14.2%	3.2%	2.8%	1.5%	0.3%	1785
województwo śląskie	32.7%	19.6%	15.9%	7.2%	12.8%	8.9%	12.2%	3.5%	8.3%	2.3%	0.5%	1187
województwo wielkopolskie	32.6%	20.4%	21.8%	14.6%	12.4%	5.7%	4.1%	3.2%	2.1%	1.2%	0.6%	1062
województwo dolnośląskie	30.5%	20.7%	22%	13.8%	11.4%	11.1%	7.4%	3.4%	1.6%	1.3%	0.2%	903
województwo małopolskie	32.9%	28.1%	12.8%	8.1%	13.2%	6.3%	13.1%	1.9%	3.3%	1.5%	0.3%	794
województwo pomorskie	28.2%	16.3%	22.5%	31.1%	10.2%	10.6%	0.4%	1.7%	1.7%	0.8%	0.1%	716
województwo łódzkie	33.6%	23.4%	21%	6%	10.7%	7.7%	1%	8.1%	4.1%	3.1%	0.3%	581
województwo kujawsko-pomorskie	29.9%	21.5%	21.3%	17.2%	10%	9%	0.8%	2.9%	3.7%	1.4%	0.8%	489
województwo zachodniopomorskie	29%	17.3%	22.8%	23.5%	10.5%	11.1%	0.2%	1.6%	2.1%	1.9%	0.4%	486
województwo lubelskie	36.1%	18.4%	17.5%	11.3%	12.5%	7.1%	5.2%	5.2%	2.1%	1.2%	0.2%	424
województwo podkarpackie	34%	28.4%	9.3%	9.6%	11.2%	13.5%	1.4%	3.7%	2.5%	1.4%	0.8%	356
województwo warmińsko-mazurskie	31.7%	15.5%	20.1%	24.3%	10.4%	7.8%	1.3%	1.3%	1.3%	0.6%	1%	309
województwo lubuskie	23.6%	18.3%	20.4%	18.7%	15.1%	8.1%	15.1%	1.4%	2.8%	0.4%	0%	284
województwo świętokrzyskie	40.9%	22.7%	12%	13.8%	13.3%	4.4%	5.3%	4%	3.1%	0.9%	1.3%	225

WHERE HAVE YOU RECENTLY PURCHASED MEDICATIONS OR DIETARY SUPPLEMENTS?

Analysis by age

n = 10680

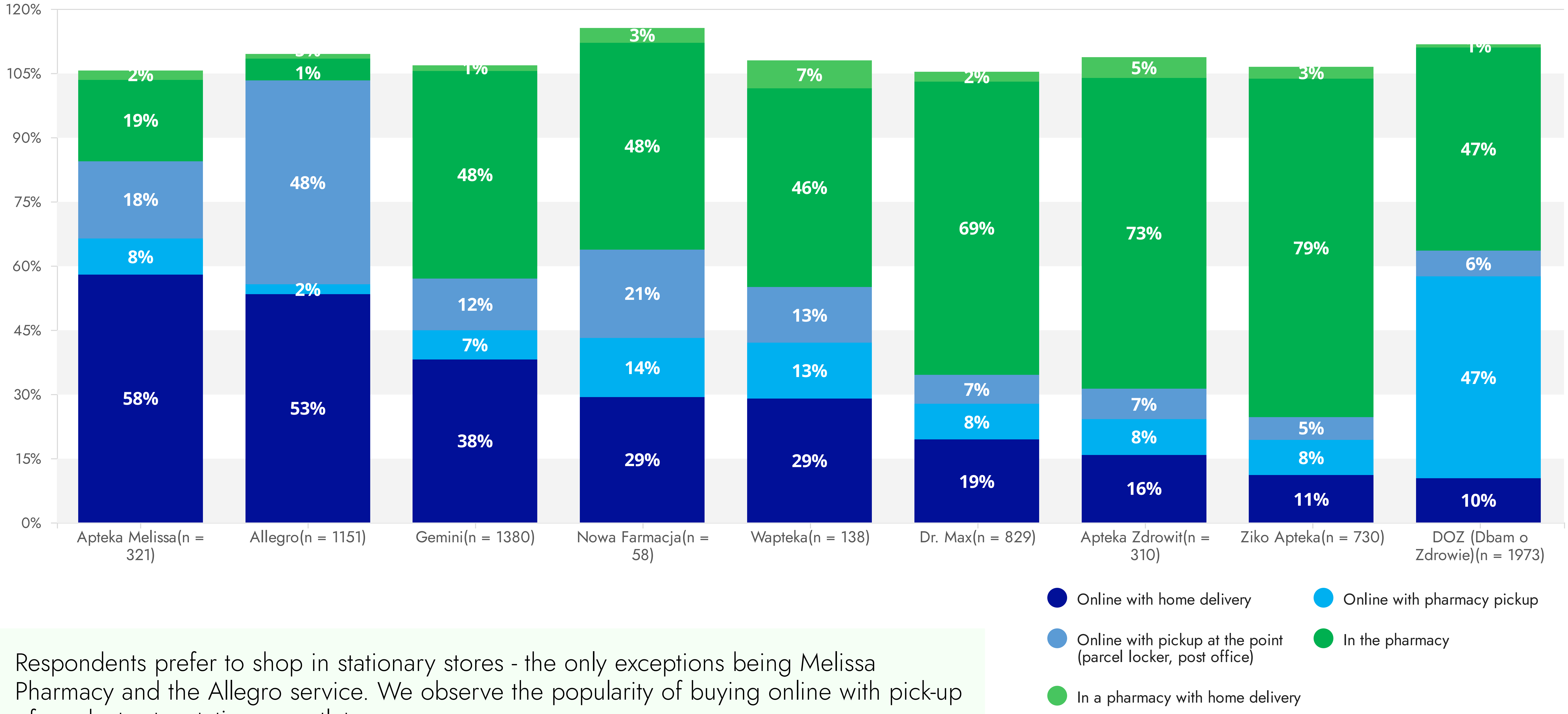


Regardless of the respondent's age, the leadership position is held by DOZ or other brands not included in the survey - the exception being the youngest, who are more likely than most to buy from Gemini. It is worth noting that the youngest (under 24) respondents are far more likely than other age groups not to buy pharmacy products.

HOW DID YOU BUY THE PRODUCTS THERE?

Purchasing channel of choice - multiple choice question

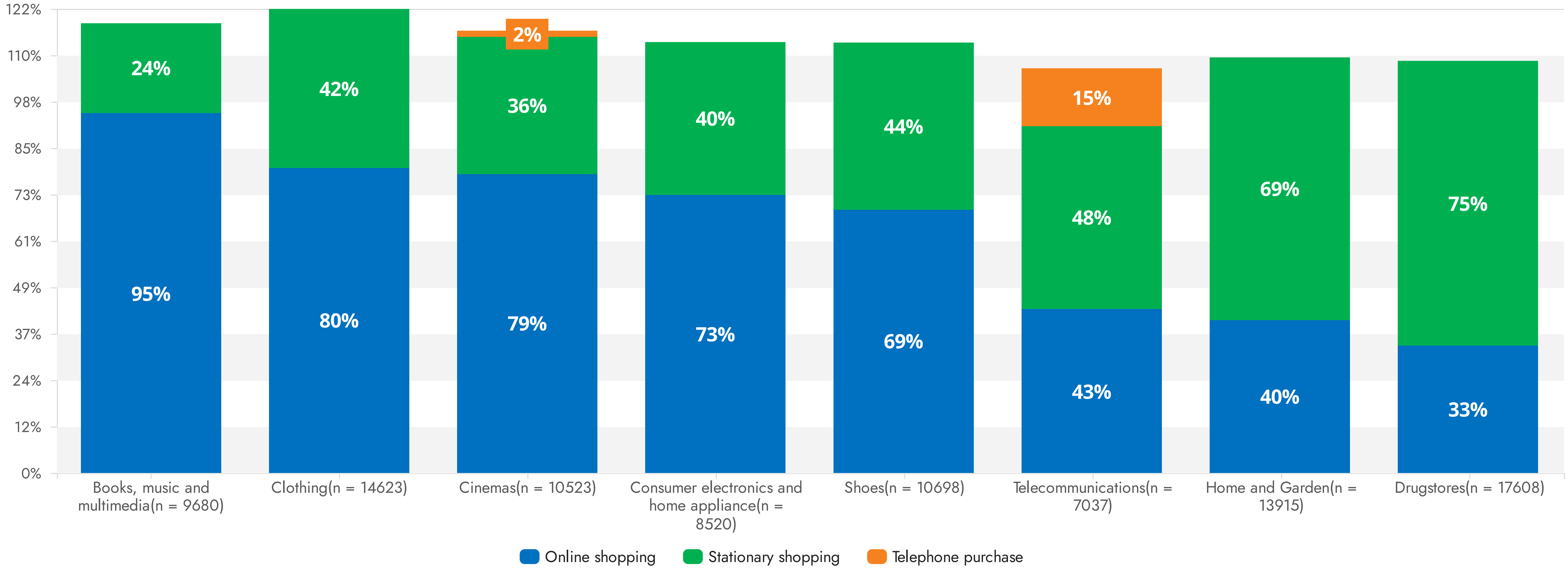
n = 5255



Respondents prefer to shop in stationary stores - the only exceptions being Melissa Pharmacy and the Allegro service. We observe the popularity of buying online with pick-up of products at a stationary outlet.

CUTTING ACROSS INDUSTRIES - HOW DID YOU BUY THE PRODUCTS THERE?

Comparison of channels chosen between industries



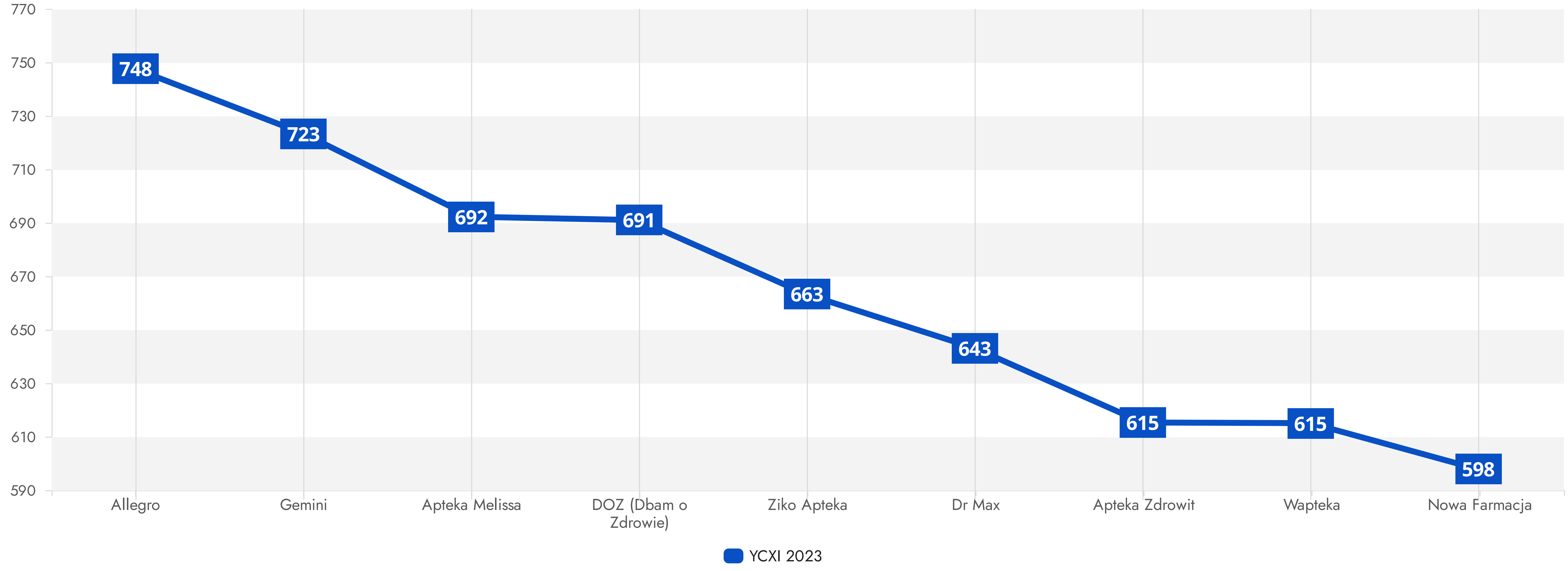
Comparing the purchasing methods of pharmacy products in Omnichannel 2023 industries, one can see how large a share online sales are and how important the penetration of sales channels is.

EXPERIENCE QUALITY INDICATORS

p. 13

YOUR CUSTOMER EXPERIENCE INDEX

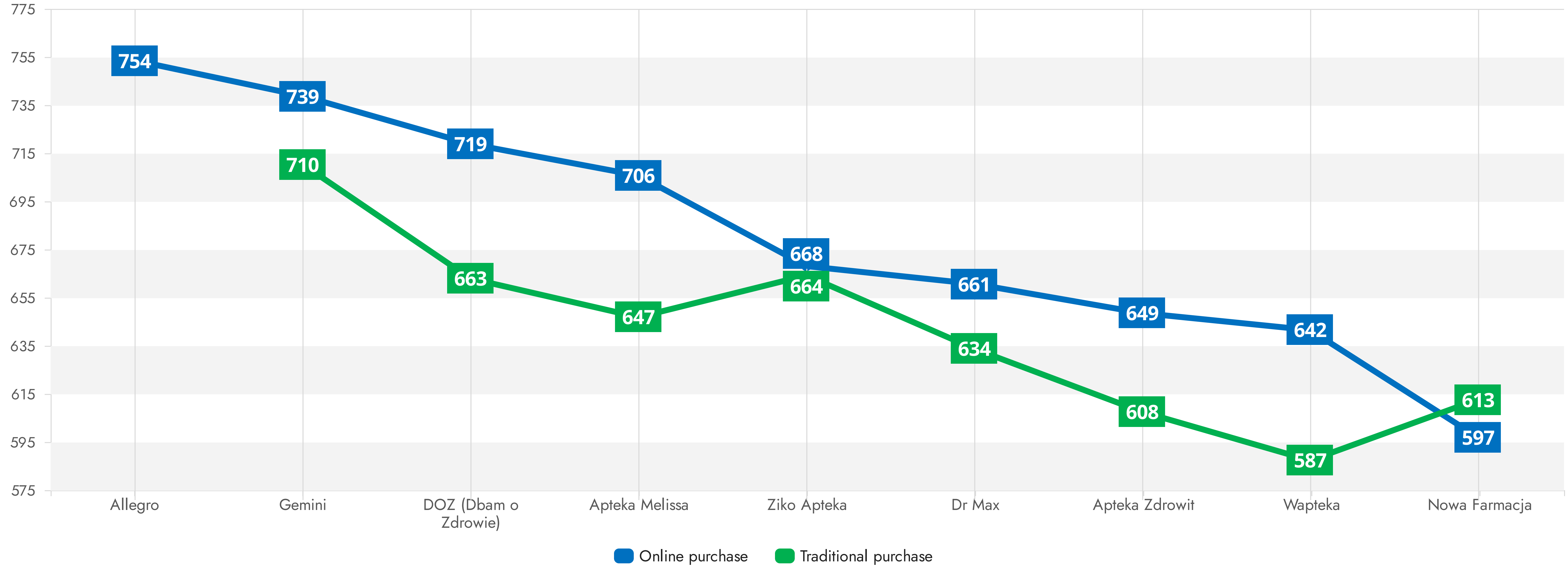
Quality index on a scale of 0 to 1000 taking into account four satisfaction factors:
availability and selection of products, ease of ordering, satisfaction with the purchase, willingness to recommend the pharmacy to friends



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 Gemini.

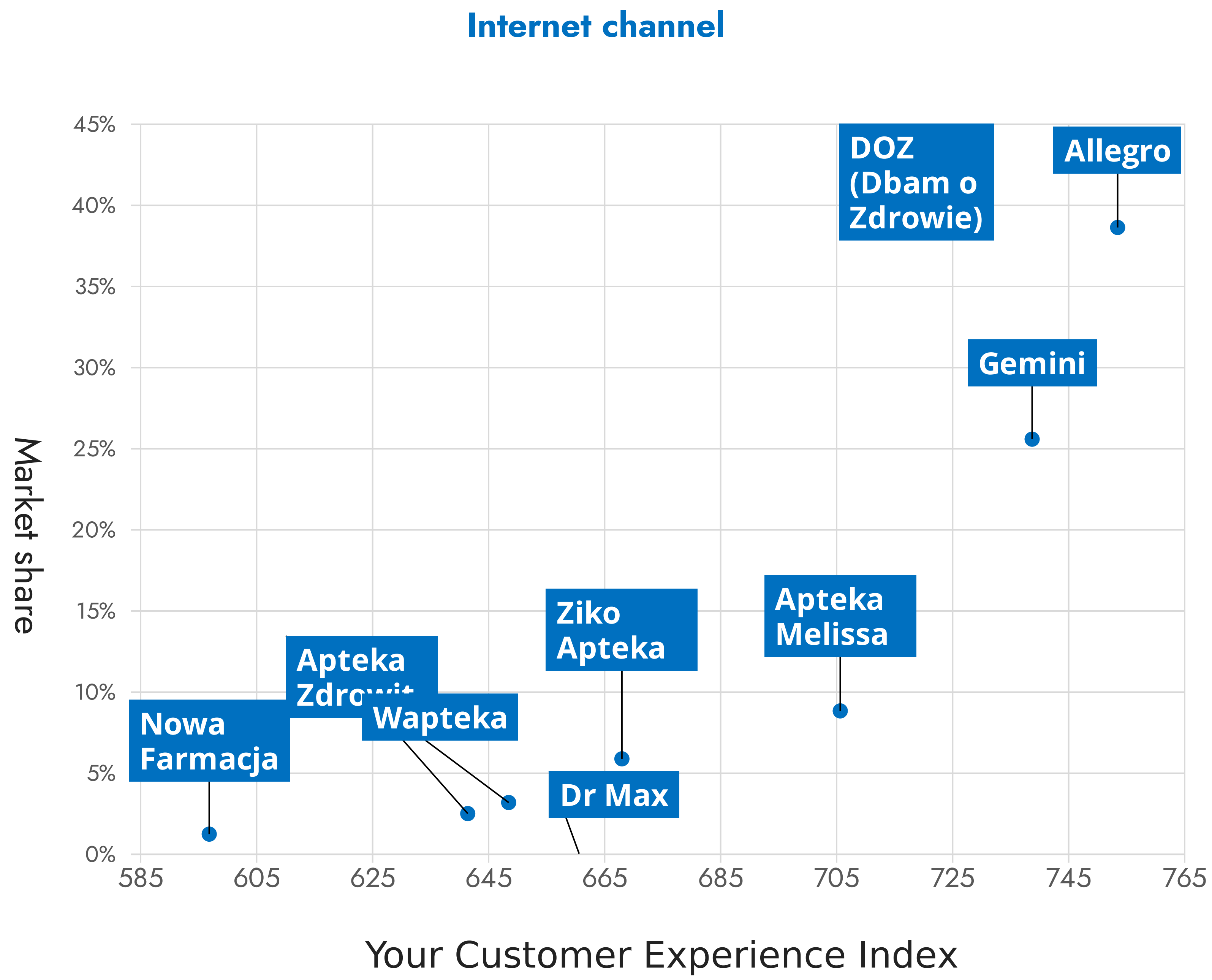
YOUR CUSTOMER EXPERIENCE INDEX

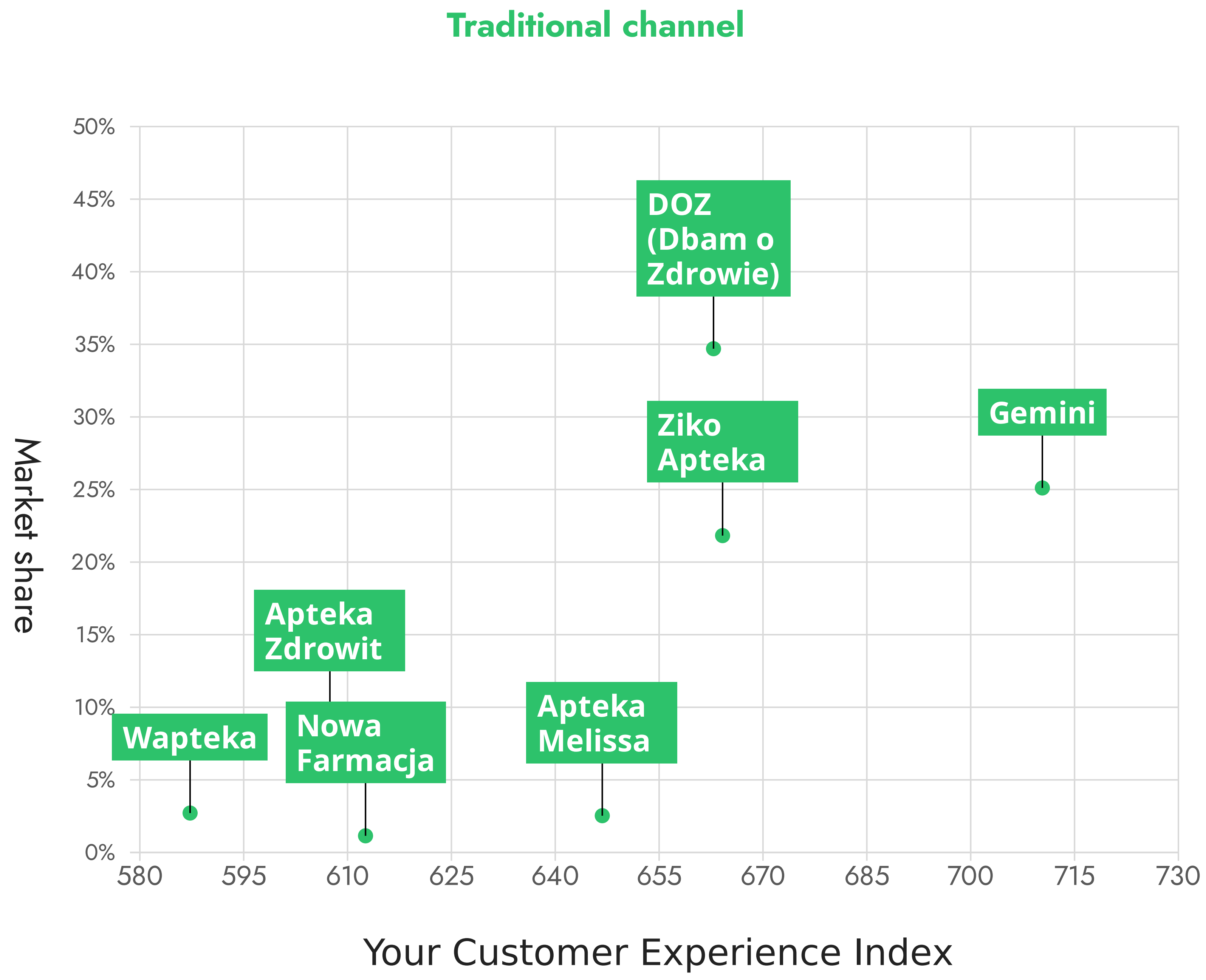
Quality index on a scale of 0 to 1000, broken down by purchasing channel



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

YOUR CUSTOMER EXPERIENCE INDEX

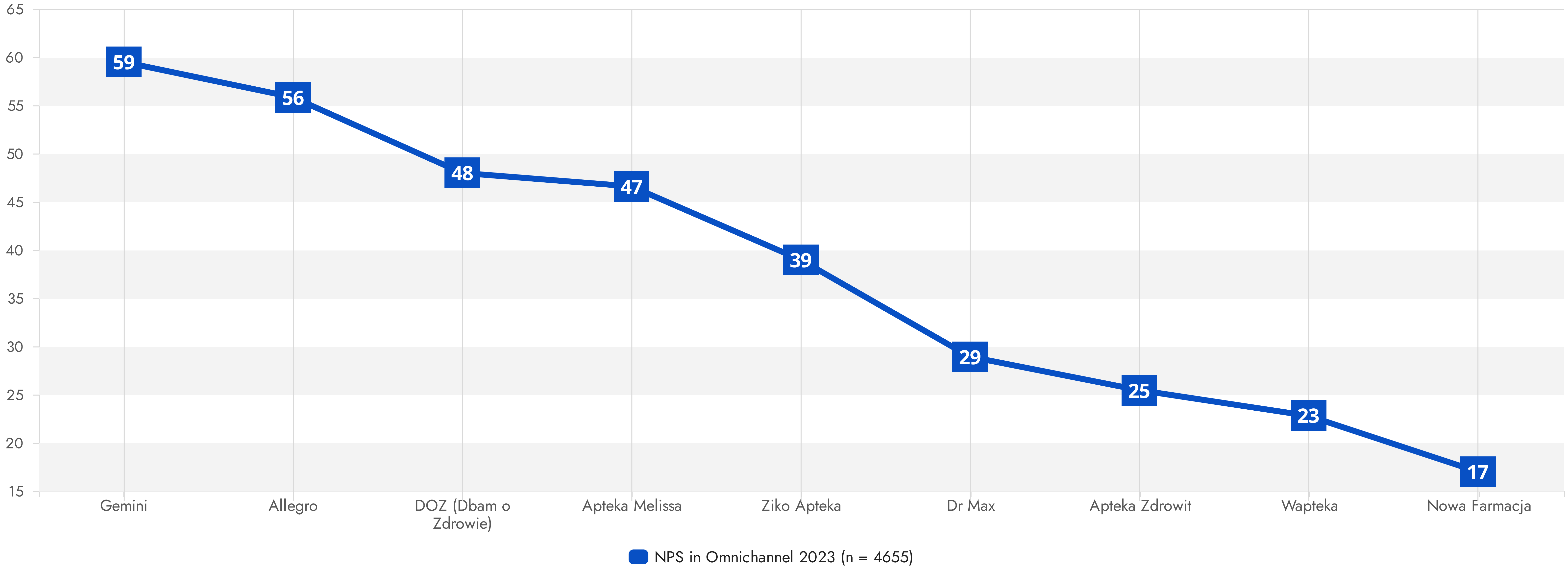




The charts show market shares by sales channel and Your Customer Experience Index values. In the online channel, DOZ dominates with the largest market share and Allegro has the highest quality index value. In the stationary channel, the DOZ network also has the largest share, and Gemini holds the leading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

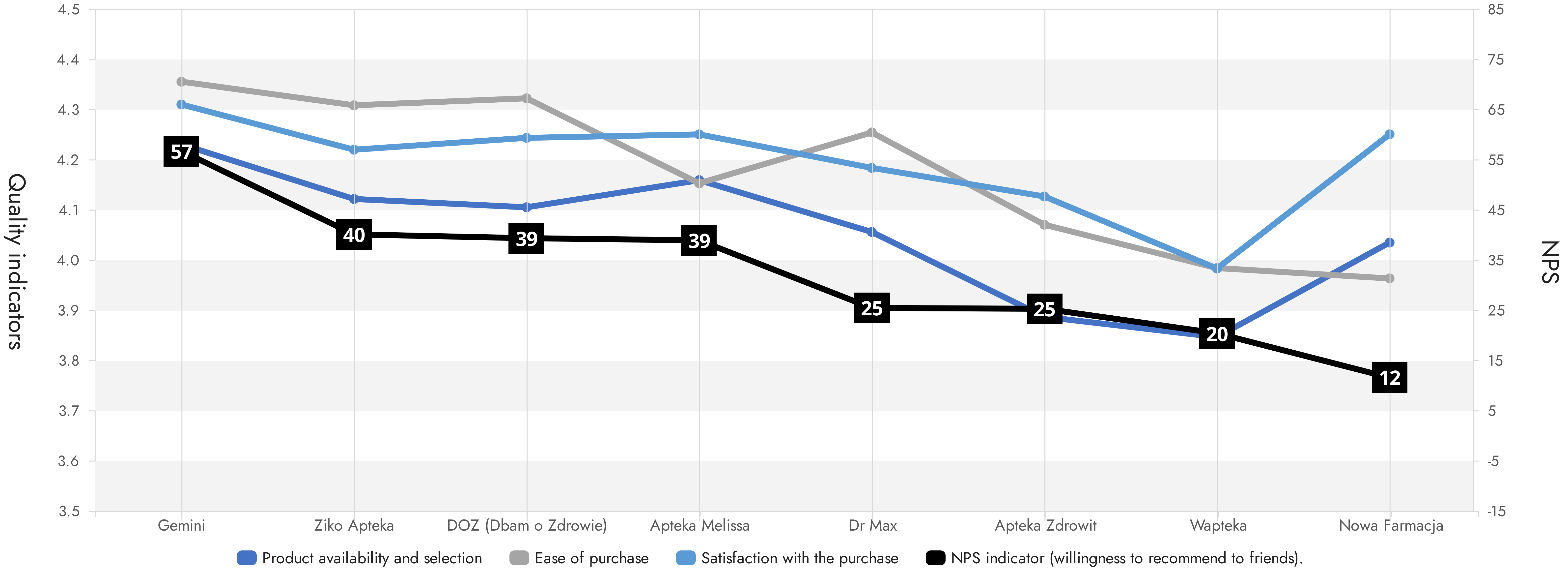
HOW LIKELY ARE YOU TO RECOMMEND THESE BRANDS TO YOUR FRIENDS?

Comparison of NPS index values



TRADITIONAL CHANNEL - EXPERIENCE QUALITY RATINGS

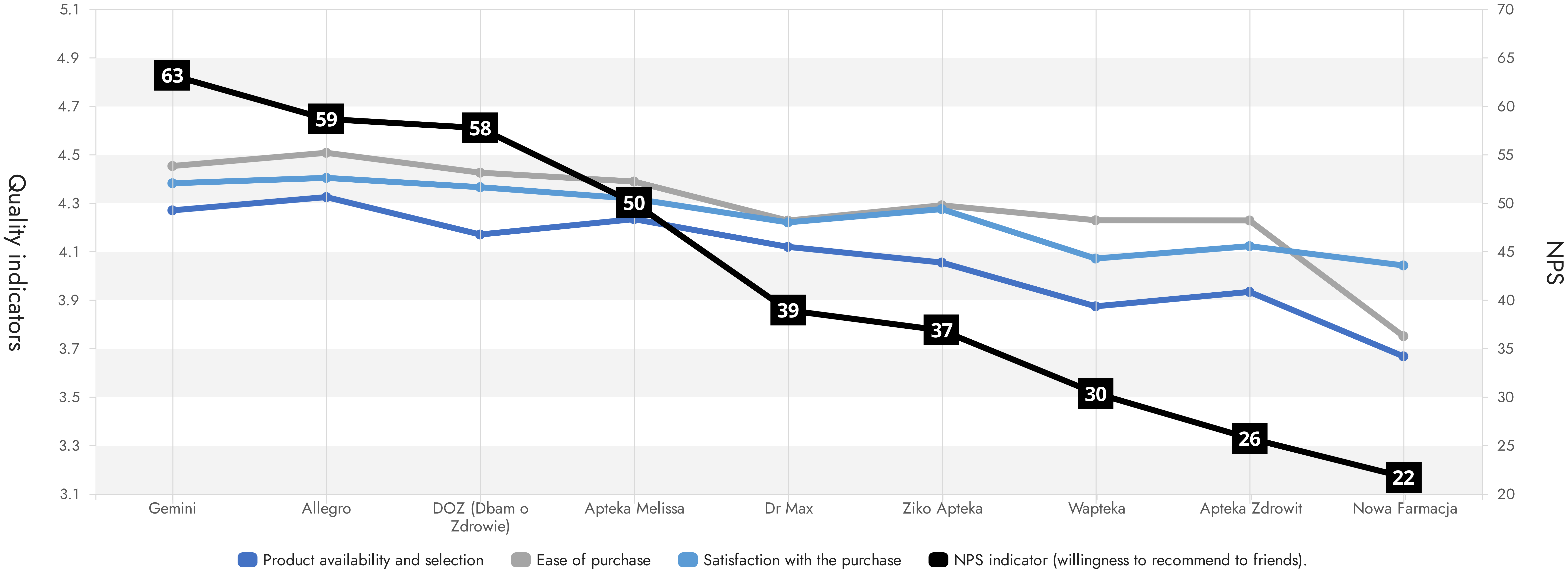
Quality ratings on a scale of 1 to 5 and NPS index on a scale of -100 to 100



The highest NPS index in the traditional channel is recorded for the Gemini store chain. The relationship between the value of the NPS index and the ease of execution 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



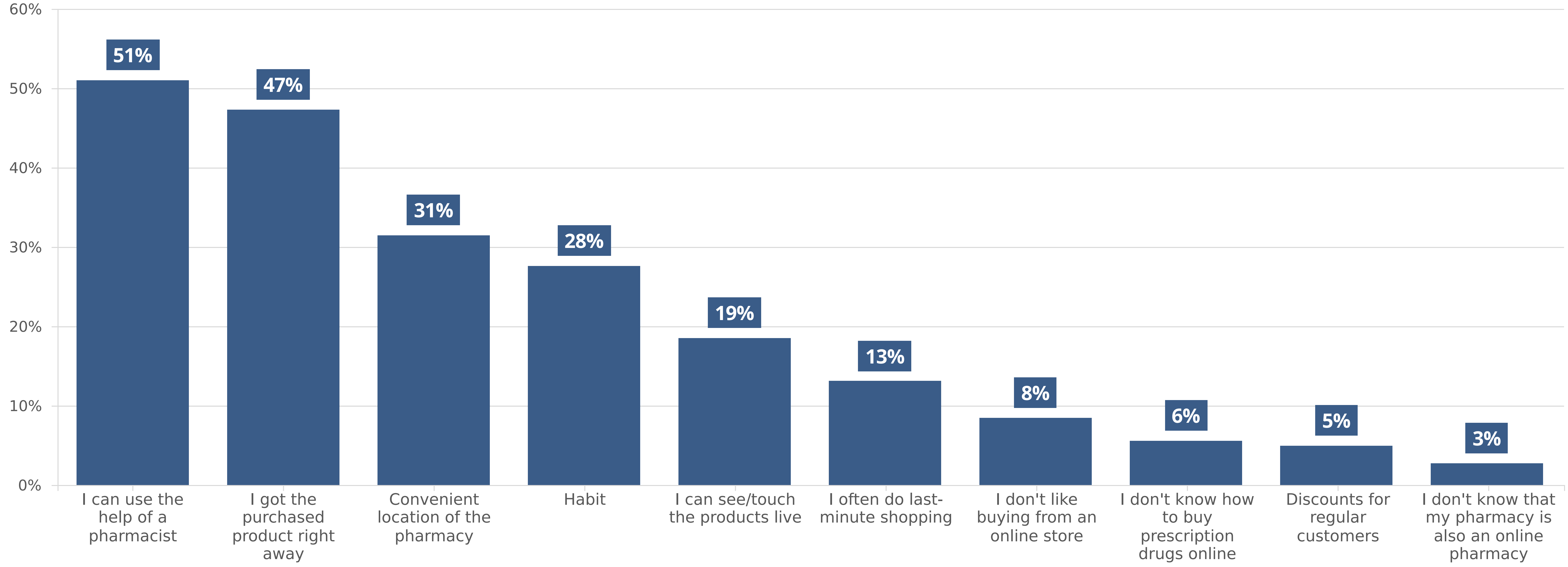
Analyzing individual aspects of the experience against the NPS indicator, we observe the strength of the Gemini brand, where high scores on individual aspects of the experience are correlated with a high likelihood of recommending the brand to friends. A slightly lower score was achieved by the Allegro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

SHOPPING PREFERENCES IN THE STATIONARY CHANNEL

WHY DO YOU PREFER SHOPPING FOR DRUGS AND SUPPLEMENTS AT A PHARMACY OR OTHER STATIONARY STORE?

Traditional channel - Multiple choice question

n = 3005



WHY DO YOU PREFER SHOPPING FOR DRUGS AND SUPPLEMENTS AT A PHARMACY OR OTHER STATIONARY STORE?

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

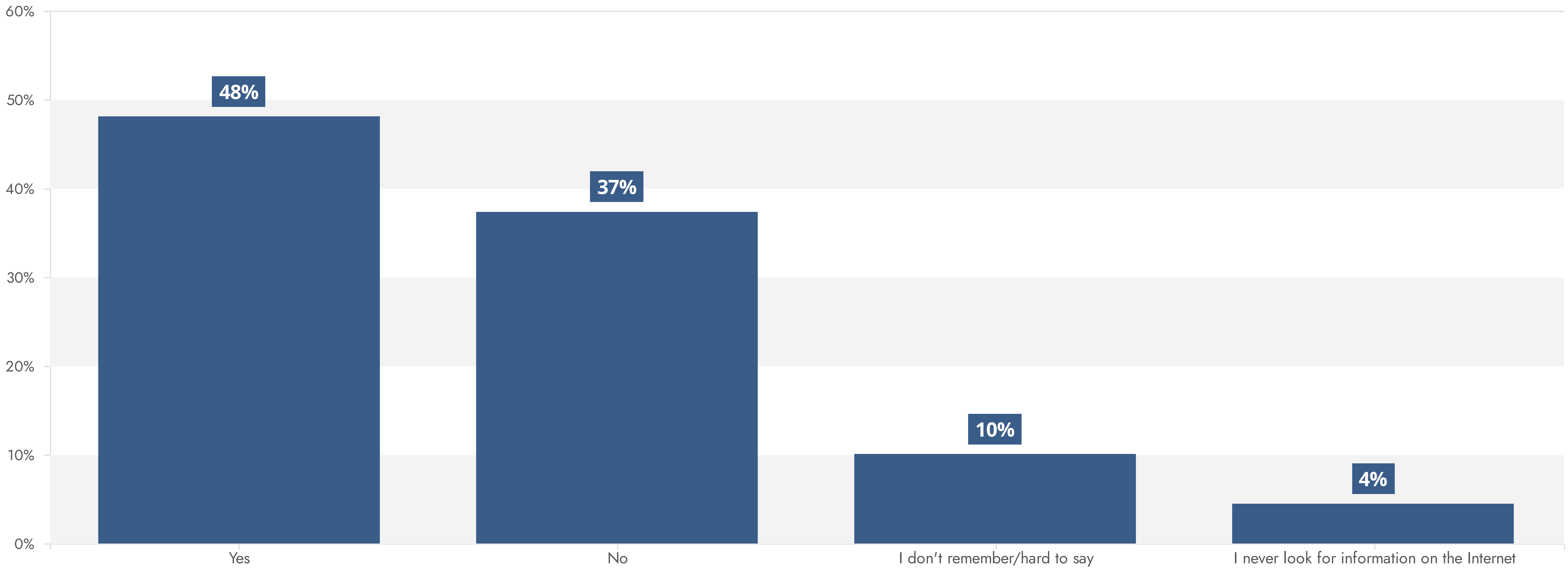
n = 3005

	I can see/touch the products live	I can use the help of a pharmacist	Discounts for regular customers	I got the purchased product right away	Convenient location of the pharmacy	Habit	I don't like buying from an online store	I don't know how to buy prescription drugs online	I don't know that my pharmacy is also an online pharmacy	I often do last-minute shopping	Result count
I can see/touch the products live		61.3%	7.7%	57.6%	35.1%	31.7%	9.7%	5%	3.2%	16.2%	556
I can use the help of a pharmacist	22.3%		4.9%	54.4%	36.7%	28.9%	7.4%	6.2%	2.6%	14.4%	1532
Discounts for regular customers	29.1%	50.7%		54.7%	39.2%	27.7%	8.8%	2.7%	5.4%	12.2%	148
I got the purchased product right away	22.5%	58.6%	5.7%		40.5%	30.9%	7.7%	6.3%	2.5%	17.5%	1421
Convenient location of the pharmacy	20.6%	59.5%	6.1%	60.8%		34.1%	7.6%	7.1%	3%	18.3%	945
Habit	21.2%	53.4%	4.9%	53%	38.8%		6.2%	9%	4%	18.6%	829
I don't like buying from an online store	21.3%	44.5%	5.1%	43.3%	28.3%	20.1%		4.7%	2.8%	10.6%	254
I don't know how to buy prescription drugs online	16.8%	56.9%	2.4%	53.9%	40.1%	44.9%	7.2%		9.6%	20.4%	167
I don't know that my pharmacy is also an online pharmacy	22%	48.8%	9.8%	43.9%	34.1%	40.2%	8.5%	19.5%		15.9%	82

BEFORE YOUR LAST PURCHASE OF DRUGS OR SUPPLEMENTS AT A STATIONARY PHARMACY, DID YOU LOOK FOR INFORMATION ONLINE?

Traditional channel - Multiple choice question

n = 1031

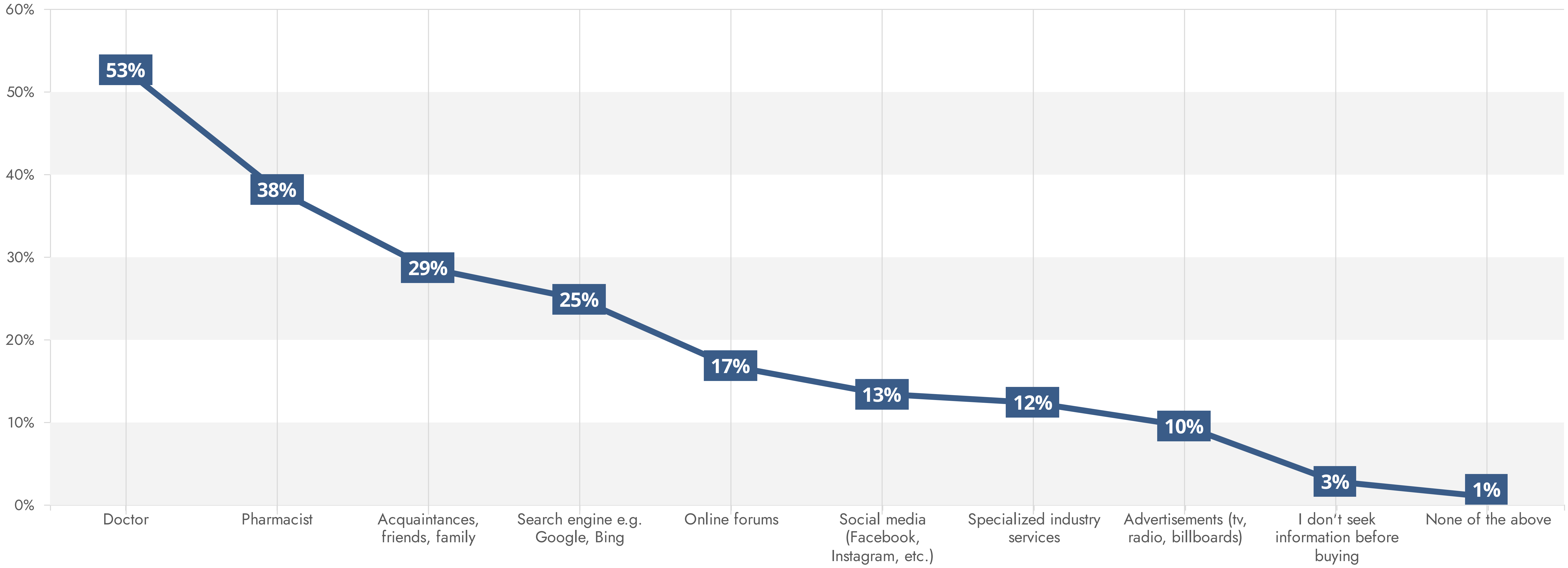


Nearly half of those surveyed say they look online for product information, reviews or product comparisons before making a purchase.

WHERE DO YOU GET INFORMATION ABOUT DRUGS AND SUPPLEMENTS?

Traditional channel - Multiple choice question

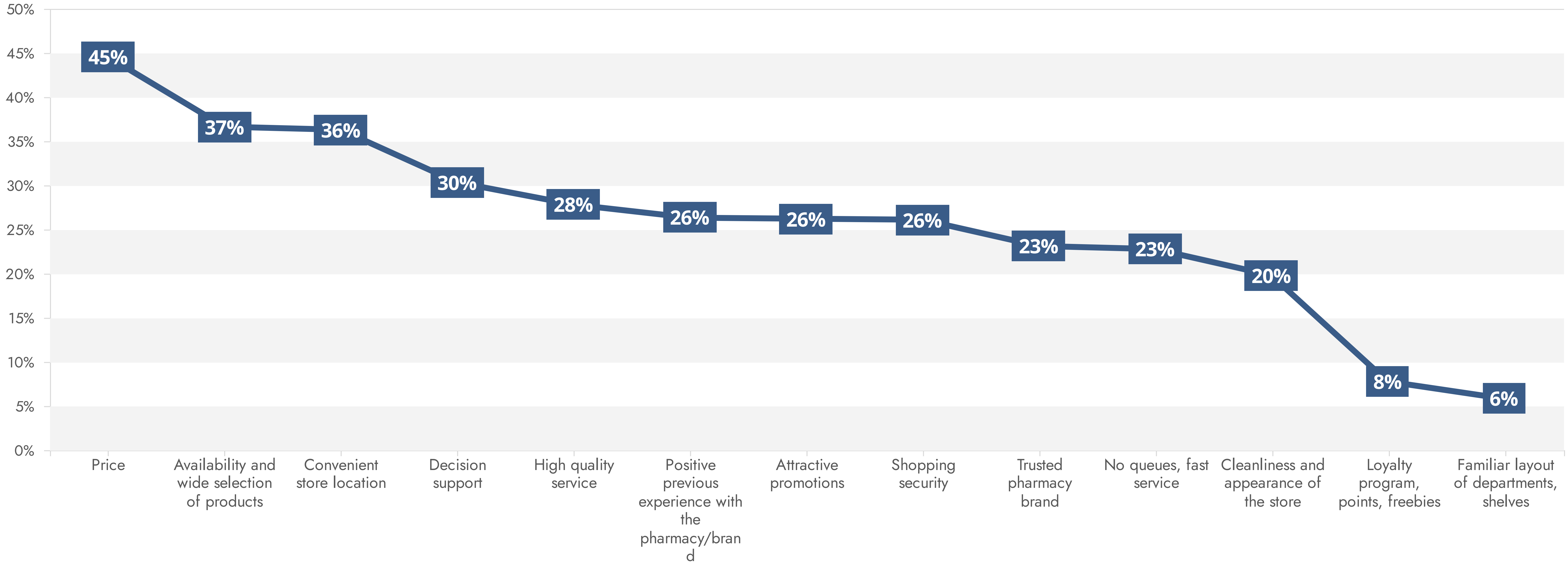
n = 1037



WHAT IS THE MOST IMPORTANT THING TO YOU WHEN BUYING DRUGS OR SUPPLEMENTS FROM A STATIONARY PHARMACY?

Traditional channel - Multiple choice question

n = 873

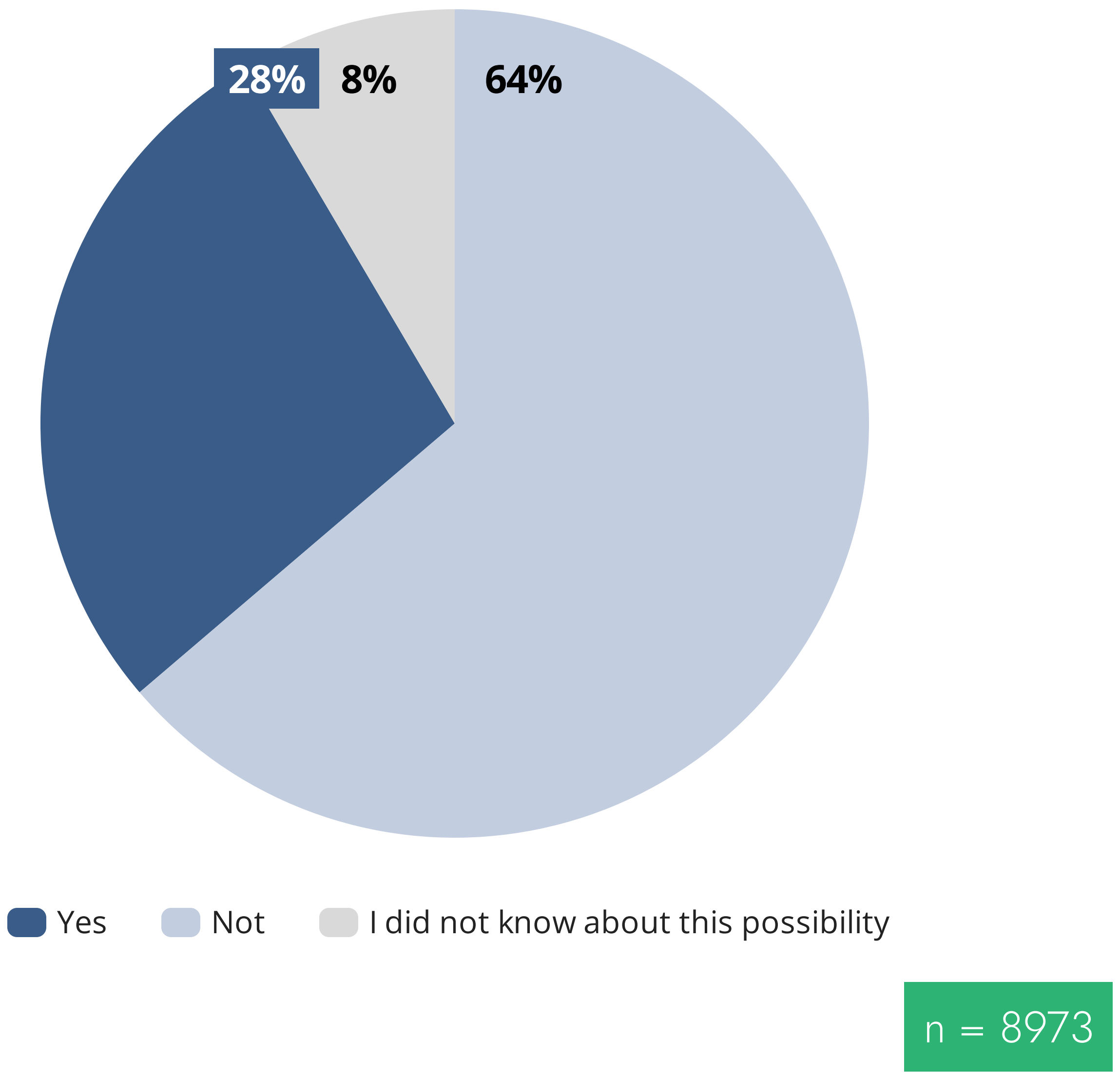


SHOPPING PREFERENCES IN THE ONLINE CHANNEL

RECEPTS

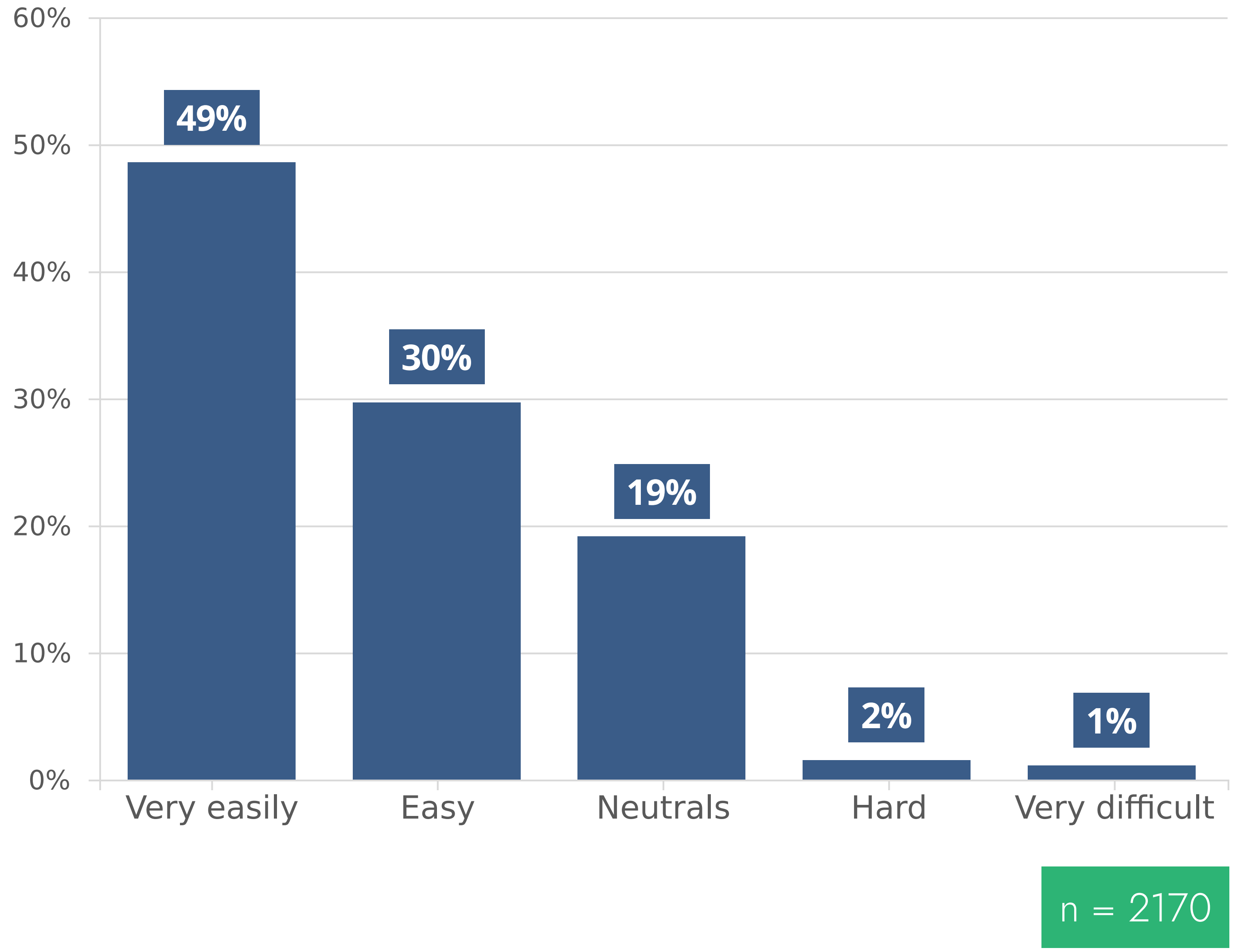
Single-choice questions

Have you ever filled a prescription online?



Single-choice questions

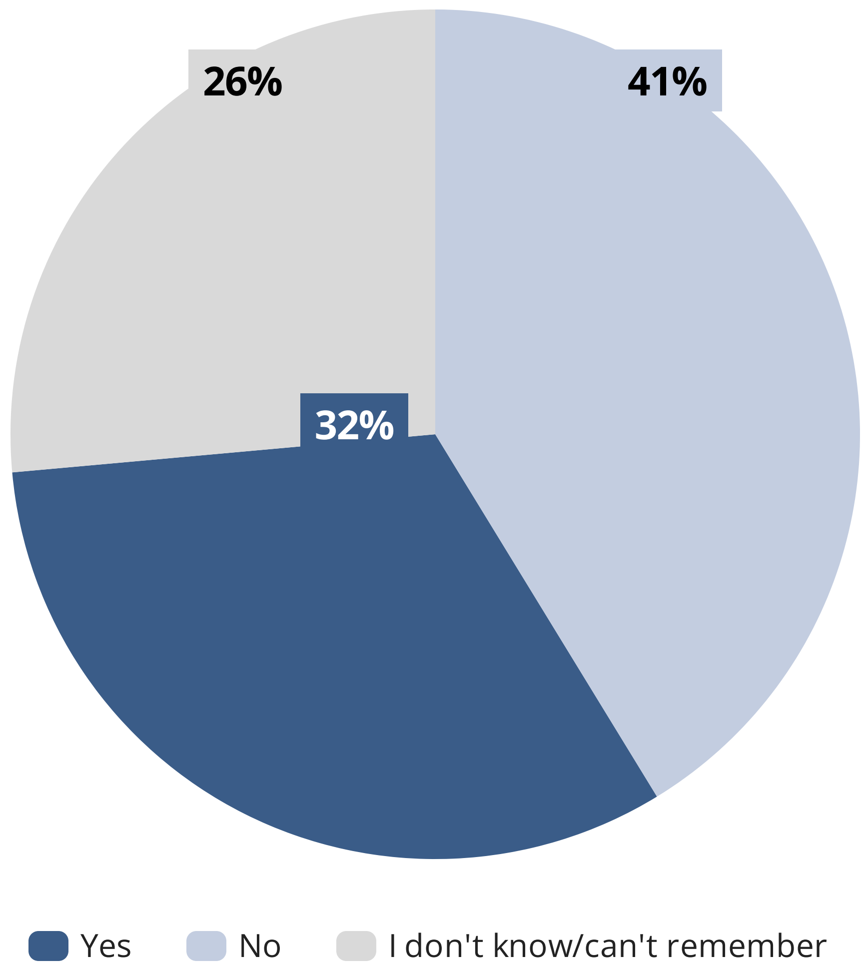
How would you rate the ease of uploading a prescription to a pharmacy's website or app?



RECEPTS

Single-choice questions

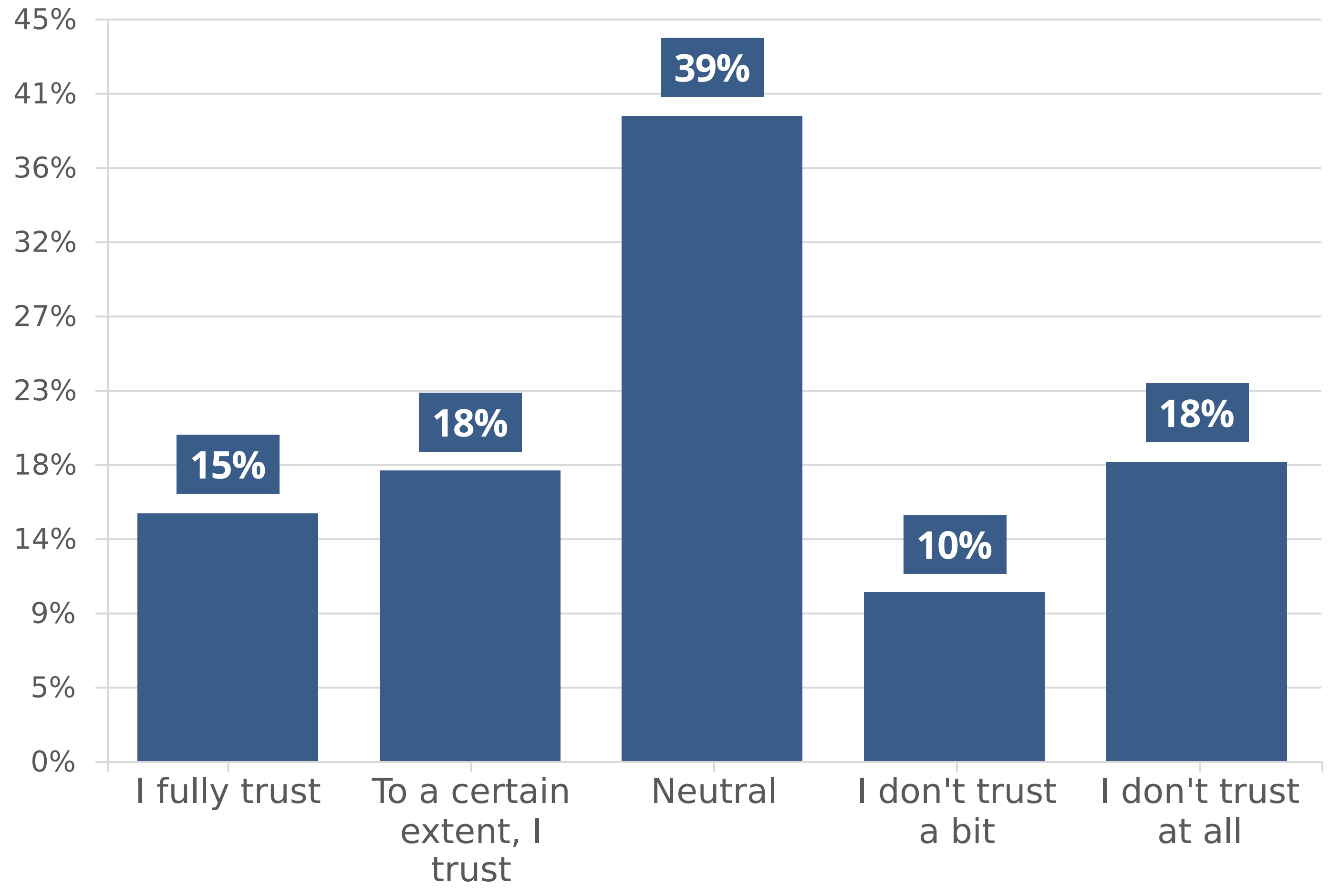
Have you ever been suggested a substitute for a drug you were looking for while shopping online?



n = 1922

Single-choice questions

How much do you trust online services to accurately process and deliver prescription drugs?

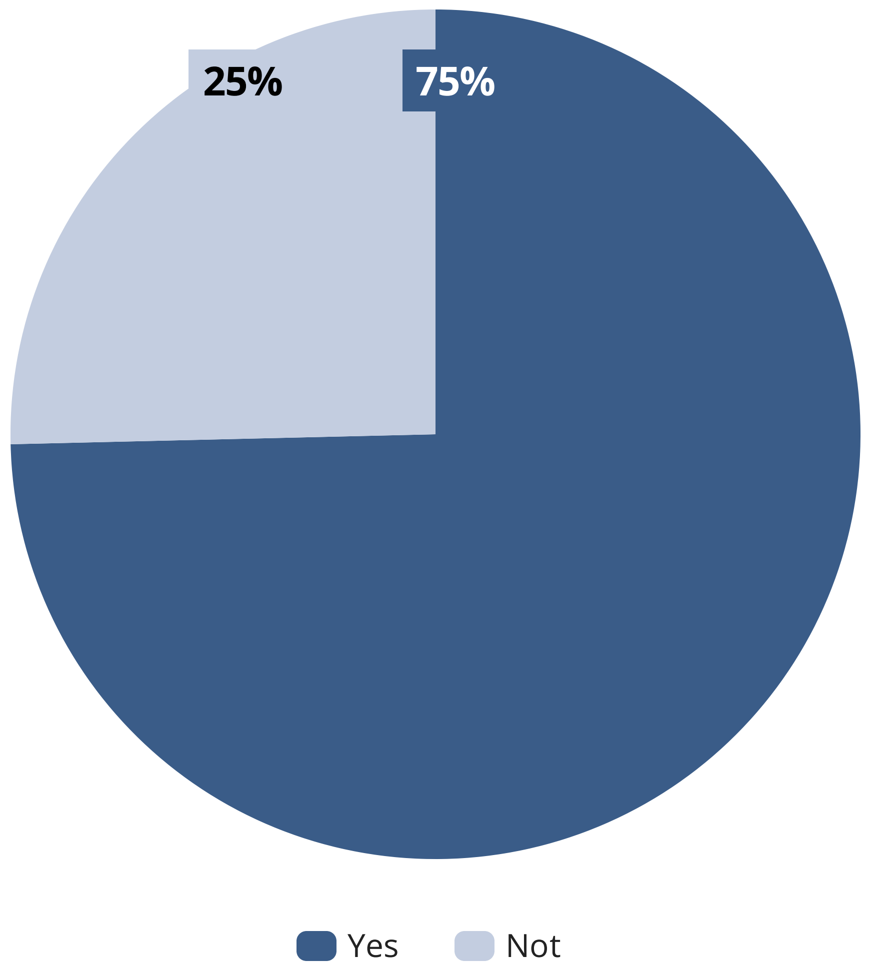


n = 7596

RECEPTS

Single-choice questions

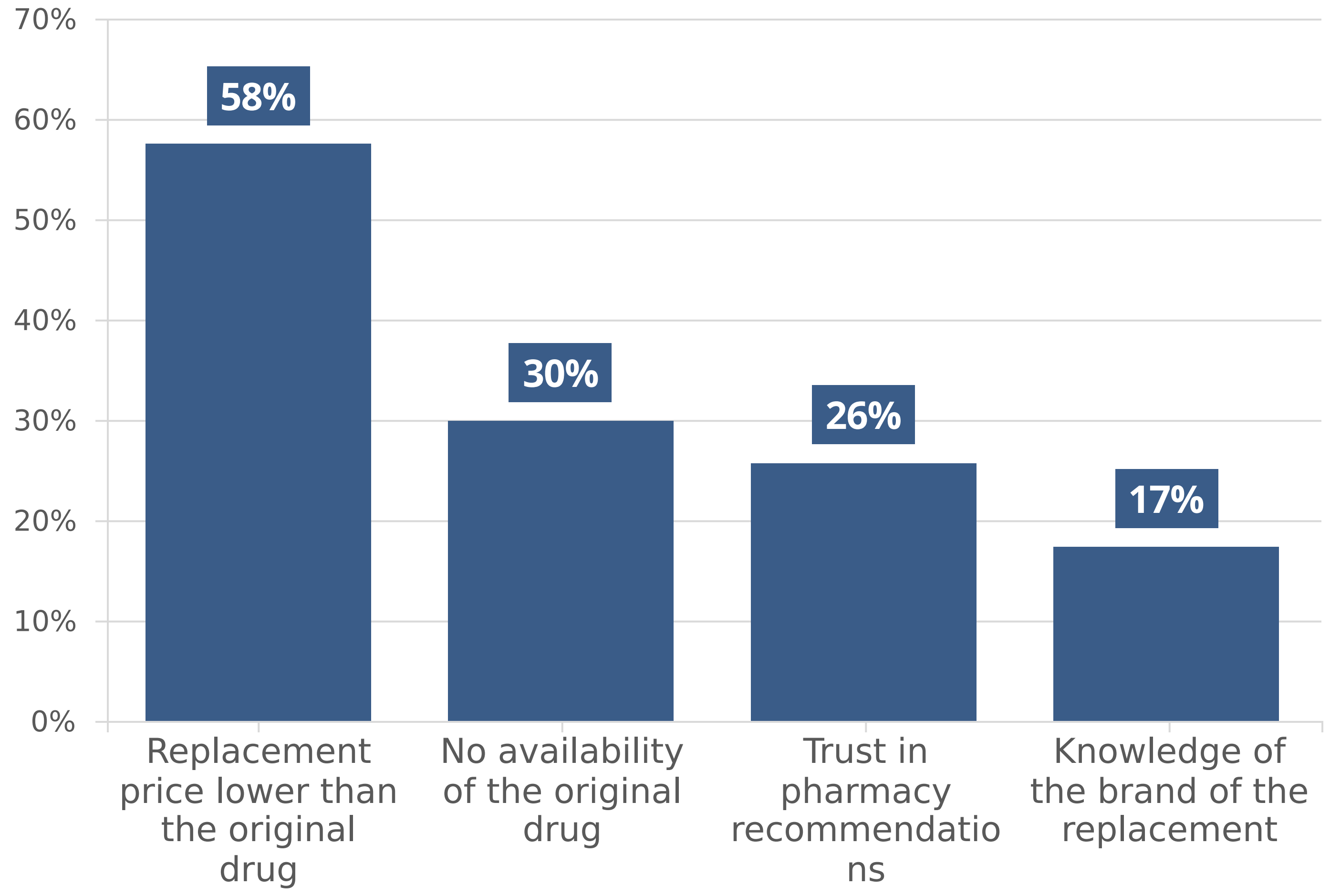
Were you willing to buy the suggested substitute instead of the original drug?



n = 603

Multiple choice questions

What could influence the choice of a substitute instead of the original drug?

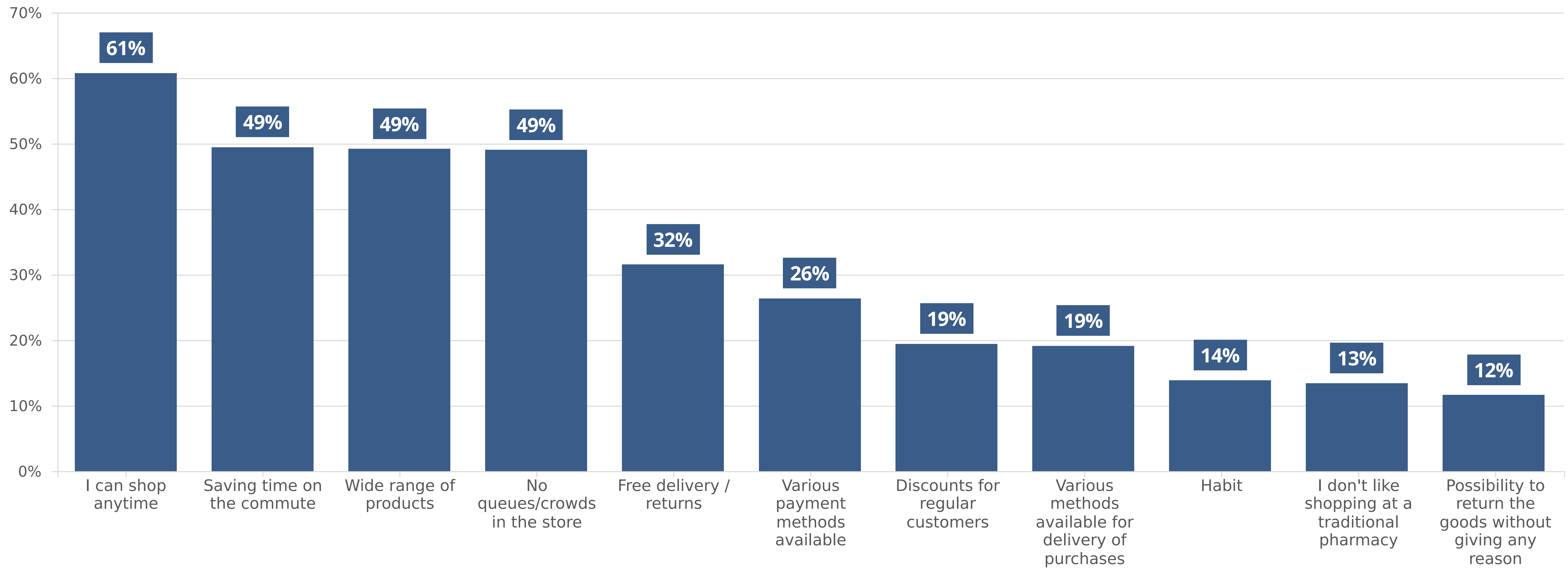


n = 565

WHY DO YOU PREFER TO BUY DRUGS AND SUPPLEMENTS ONLINE, SUCH AS FROM AN ONLINE PHARMACY?

Internet channel - Multiple choice question

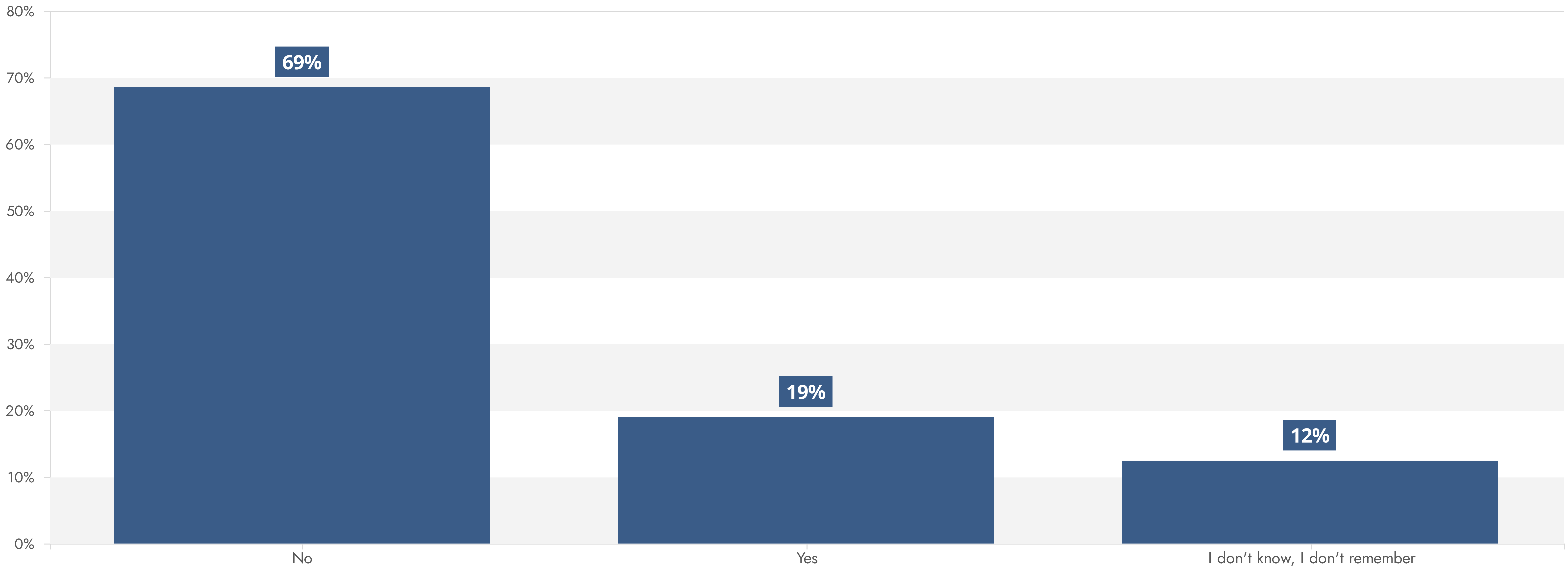
n = 1299



BEFORE THE LAST TIME YOU PURCHASED DRUGS OR SUPPLEMENTS ONLINE, DID YOU VISIT A STATIONARY PHARMACY TO REVIEW THE PRODUCT?

Internet channel - Multiple choice question

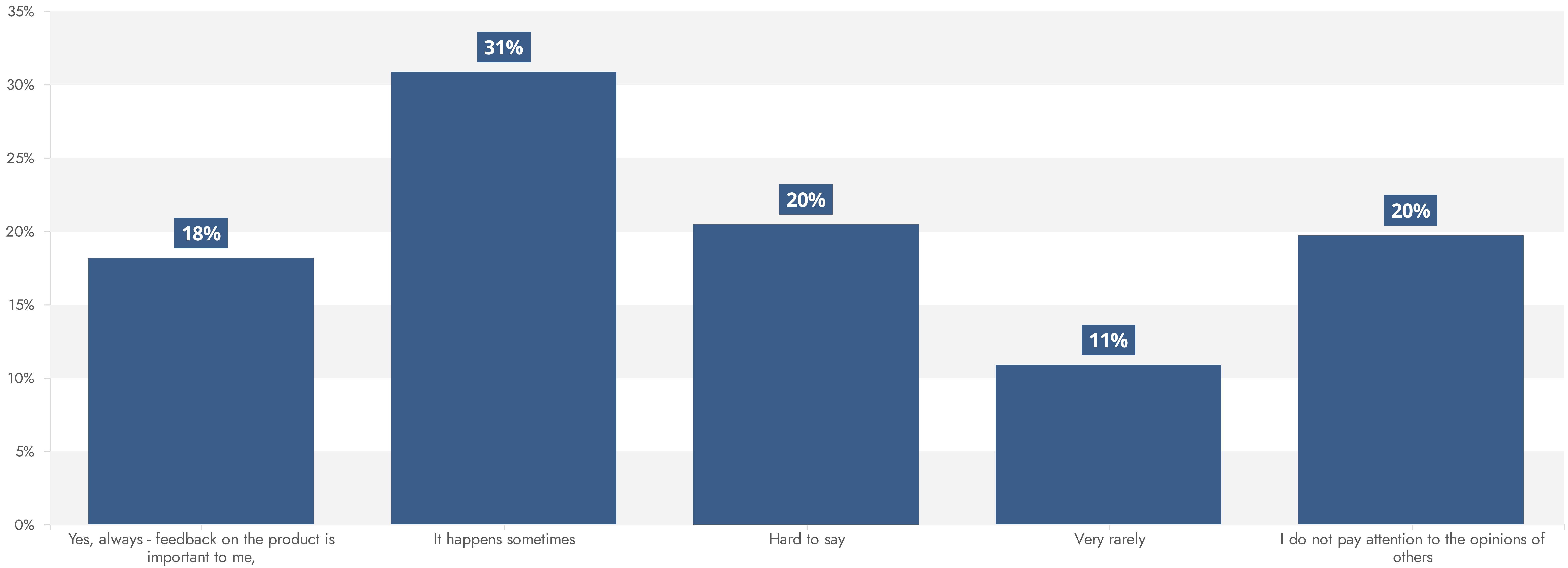
n = 1310



DO YOU HAPPEN TO GIVE UP BUYING A HEALTH OR BEAUTY PRODUCT BECAUSE OF NEGATIVE REVIEWS OR ITS LOW RATING?

Internet channel - One-choice question

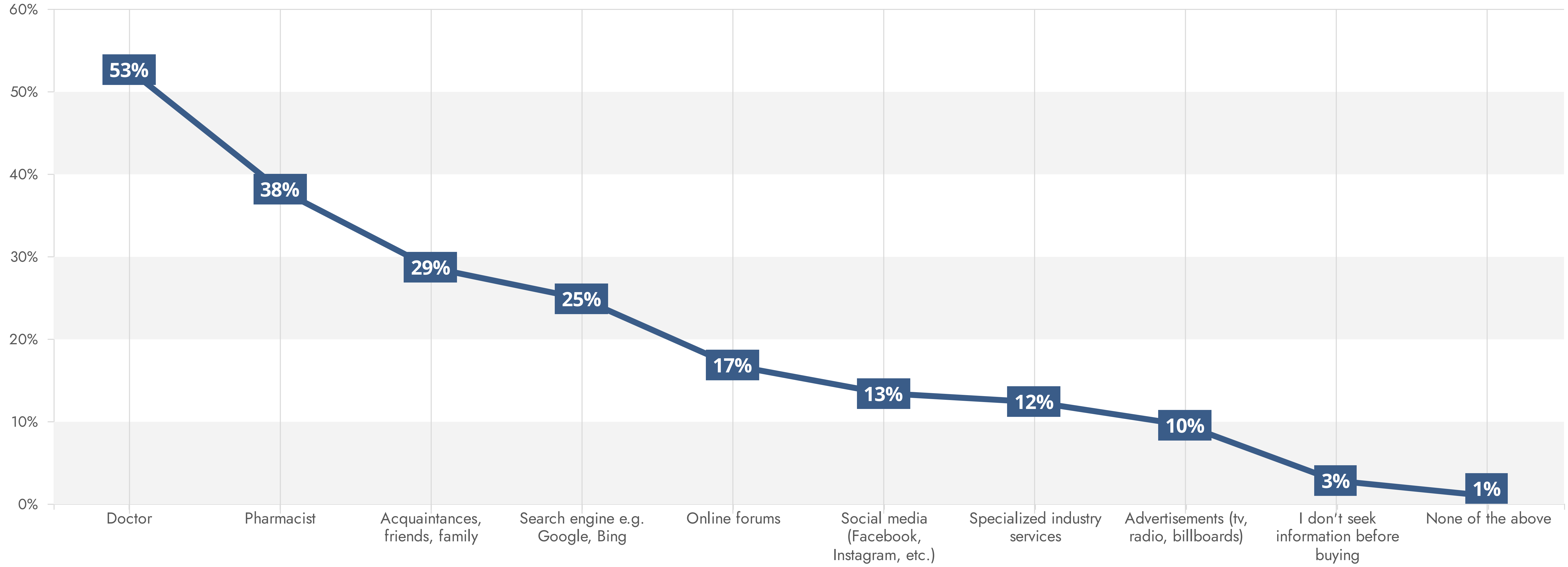
n = 6127



WHERE DO YOU GET INFORMATION ABOUT DRUGS AND SUPPLEMENTS?

Internet channel - Multiple choice question

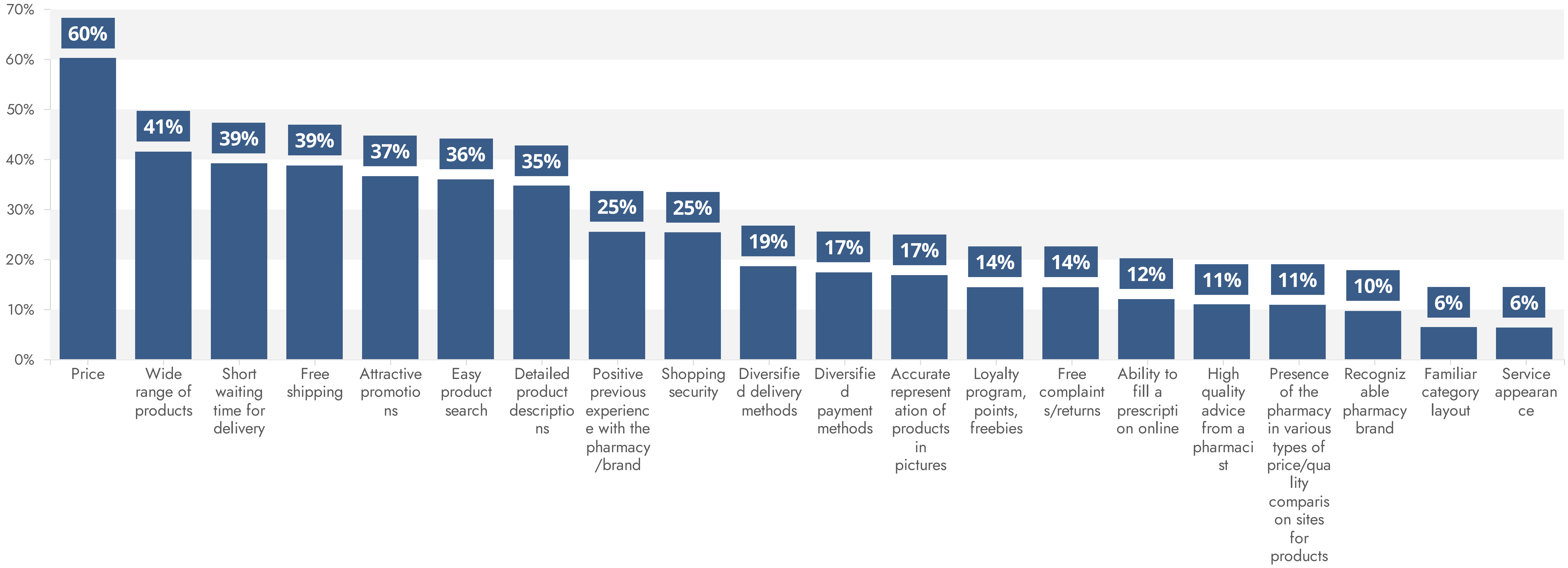
n = 1037



WHAT IS THE MOST IMPORTANT THING TO YOU WHEN BUYING DRUGS OR SUPPLEMENTS FROM AN ONLINE PHARMACY?

Internet channel - Multiple choice question

n = 1050

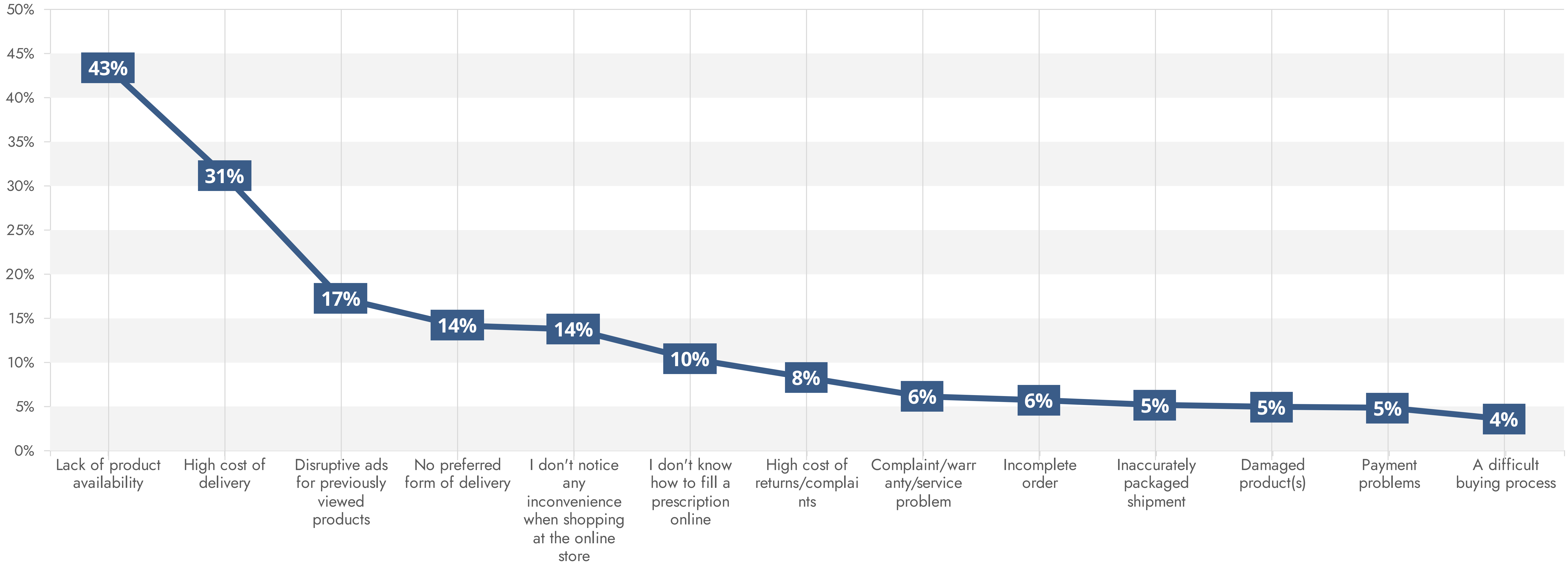


60% of respondents indicate that price is the most important factor, followed by attention to a wide selection of products, short waiting time for products and free delivery. The smallest share of responses is noted for the site's appearance and familiar category layout.

WHAT INCONVENIENCES DO YOU ENCOUNTER WHEN SHOPPING FOR DRUGS AND SUPPLEMENTS AT AN ONLINE PHARMACY?

Internet channel - Multiple choice question

n = 934

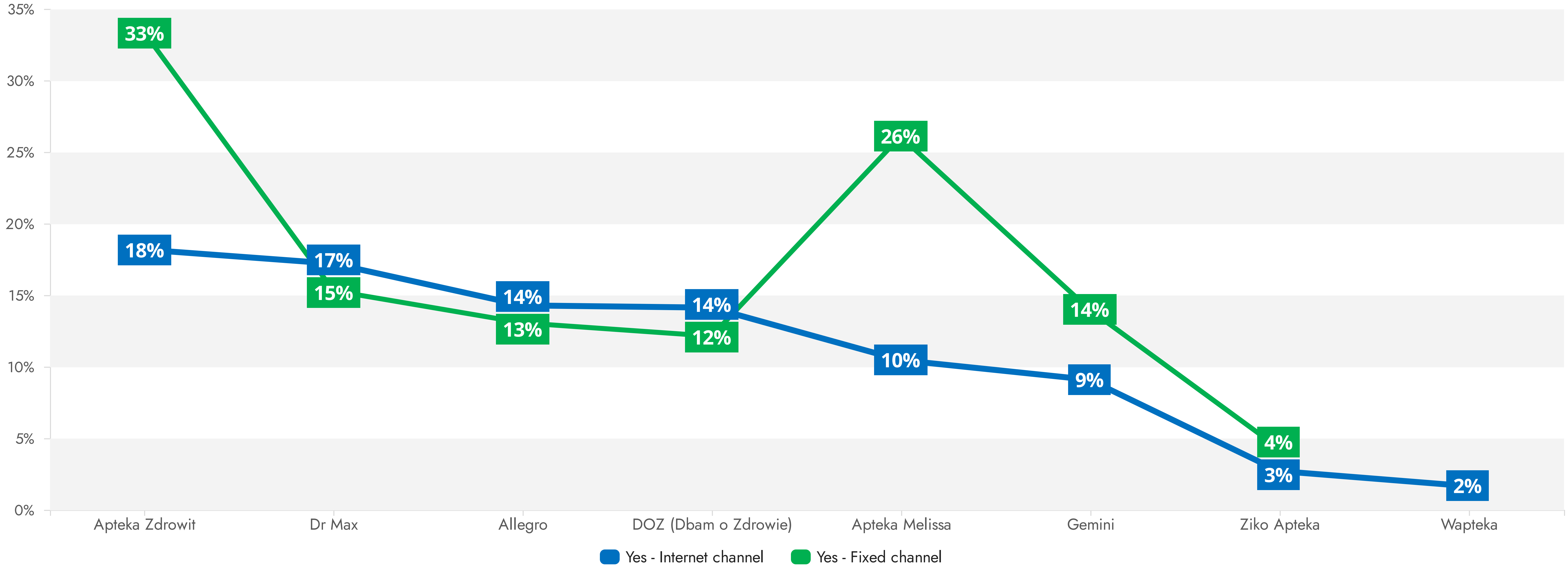


POST-PURCHASE EXPERIENCE

HAVE YOU HAD CONTACT WITH THE CUSTOMER SERVICE DEPARTMENT DURING THE LAST YEAR? - SHARE HAVING CONTACT

Analysis of customers in contact with Customer Service Offices

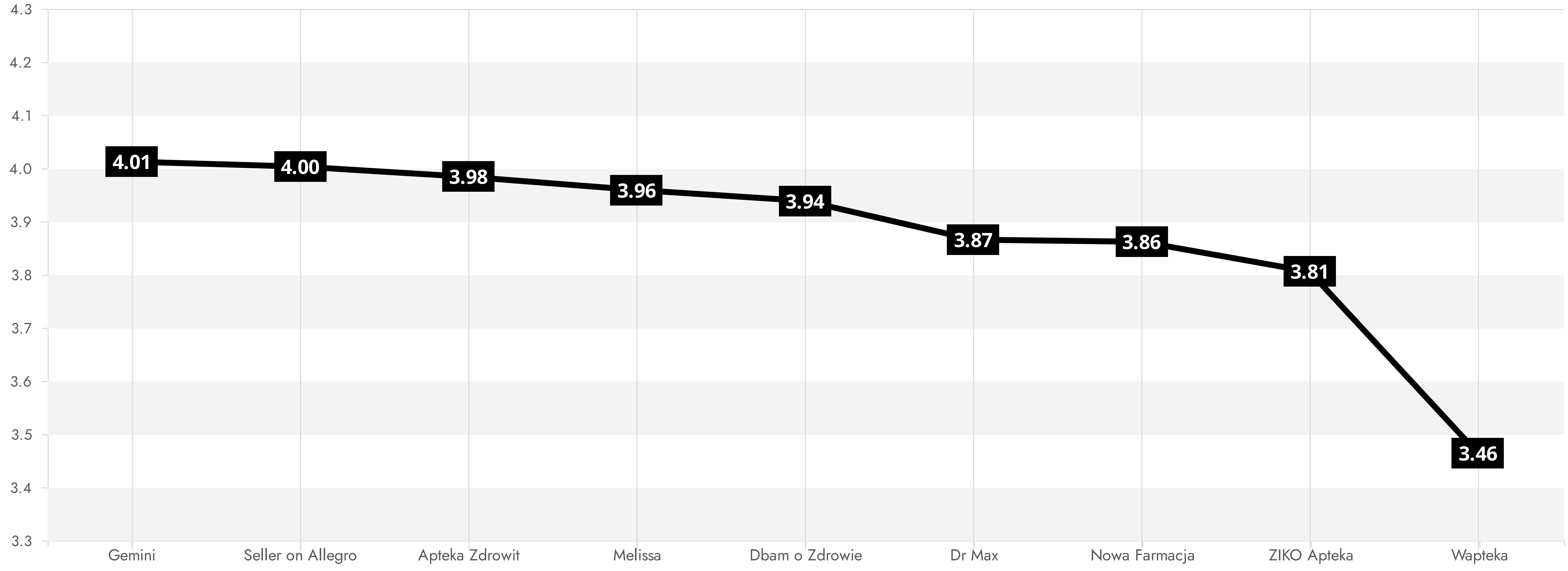
n online store = 1059, n traditional store = 940



EVALUATION OF CONTACT WITH THE CUSTOMER SERVICE OFFICE - ENGAGEMENT OF THE CONSULTANT.

Rating on a scale of 1 to 5

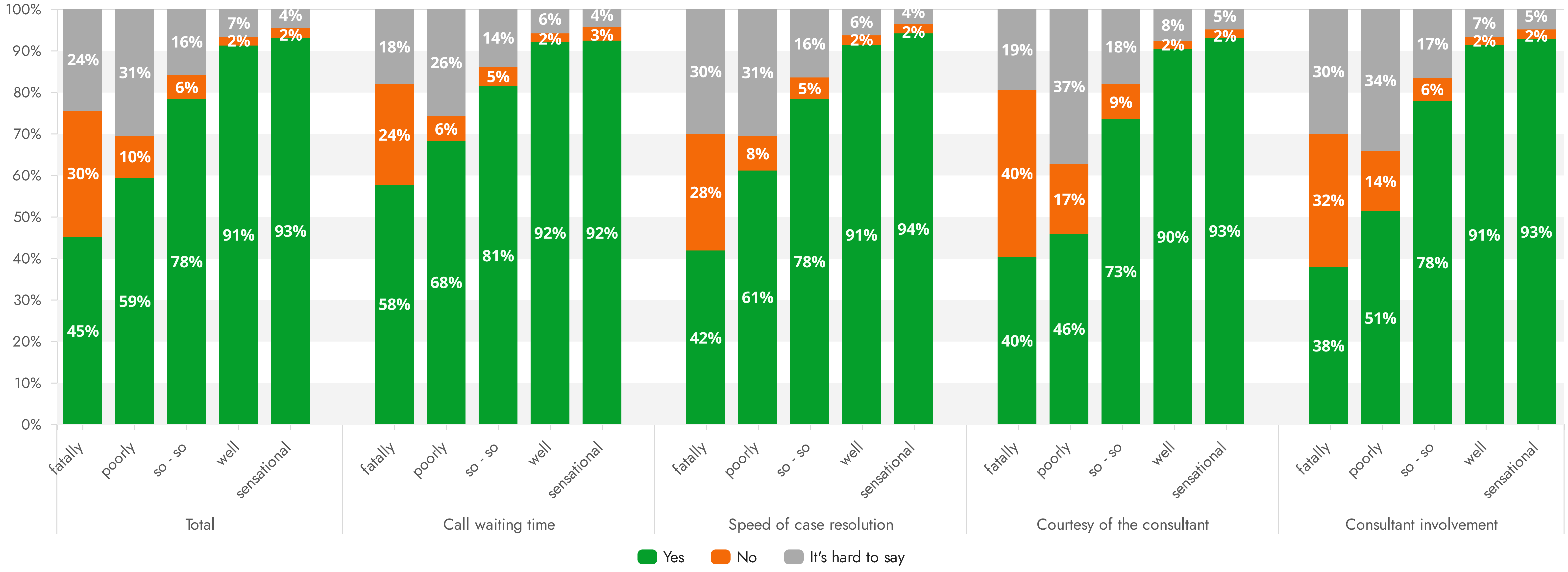
n = 1921



ARE YOU STILL USING OR WILL YOU BE USING THIS BRAND SERVICES? - ACCORDING TO RATINGS OF PARTICULAR ASPECTS

Single-choice matrix question

n = 2095



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, his or her commitment, the speed with which the matter is resolved, and the length of time it takes to connect.

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 influence of reviews and ratings on purchasing decisions
- Preferred methods of contacting brands according to purchase method
- 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

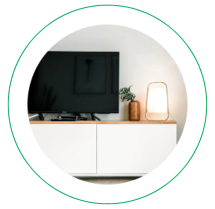

Drugstores


Footwear


Pharmacies


Telecommunicati


Home and garden


CONSUMER ELECTRONICS


Books, multimedia


Subscription media (Streaming, VOD, Audiobooks).

Share your opinion on the report

Subsequent reports will be published on the YourCX

If you are interested in additional analysis or research of your own clients, we invite you to contact and cooperation!

Piotr Wojnarowicz

p.wojnarowicz@yourcx.io

+48 661 627 620

YourCX