YourCX

REPORT

OMNICHANNEL 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

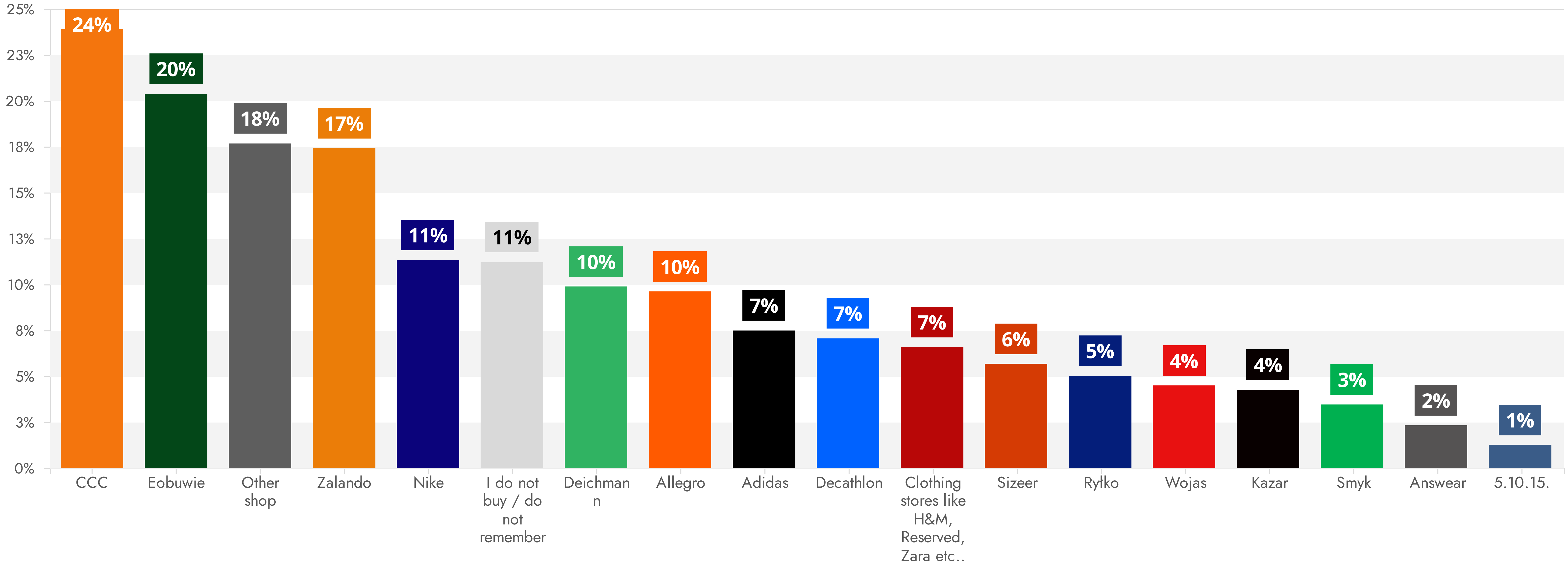
EXAMPLES OF CALCULATIONS FOR COMPANY XYZ

	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 BOUGHT SHOES?

Multiple choice question

n = 9580

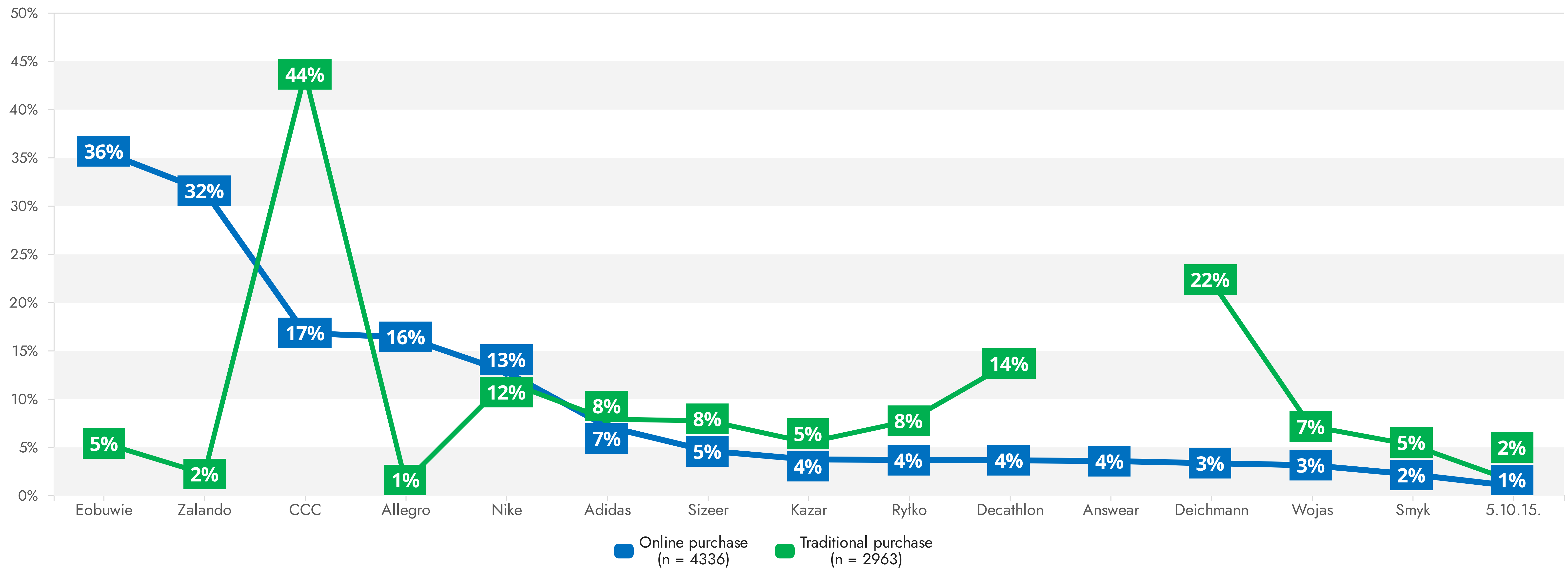


The results of Omnichannel 2023 indicate that the footwear industry is highly dispersed - 18% of respondents' indications are from stores not specified in the survey. The CCC brand can be seen as the leader, with 24% of respondents indicating that they have made purchases - it is worth noting that CCC has an extensive stationary sales network as well as a growing online store. Next, 20% of respondents say they have shopped at Eobuwa, and 17% point to Zalando. The results are aggregated for all shopping channels (online and traditional shopping combined).

WHERE HAVE YOU RECENTLY BOUGHT SHOES?

Market shares by purchase channel

n = 4336 online purchase, 2963 stationary purchase

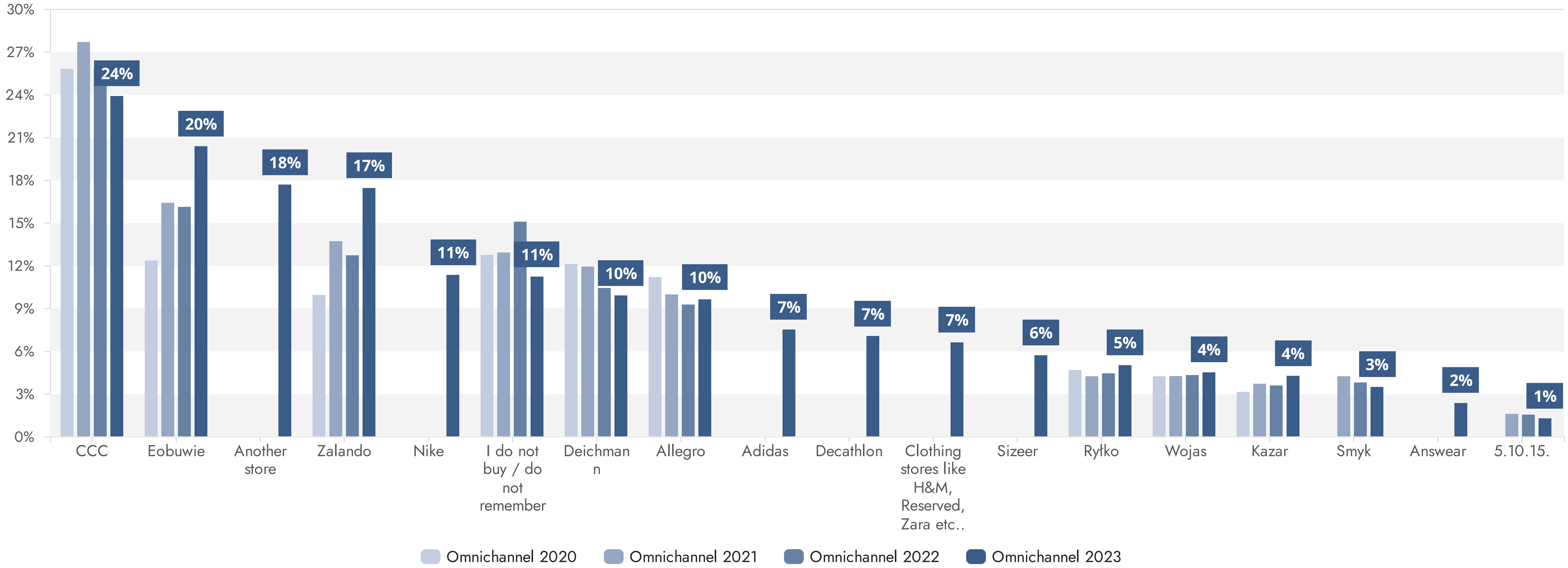


Depending on the store where respondents purchase footwear, shopping channel preferences are distributed differently. In the online channel, Eobuwie is the leader, while CCC is the clear leader in traditional sales.

WHERE HAVE YOU RECENTLY BOUGHT SHOES?

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

n 2020 = 7033, 2021 = 9779, 2022 = 12181, 2023 = 9580

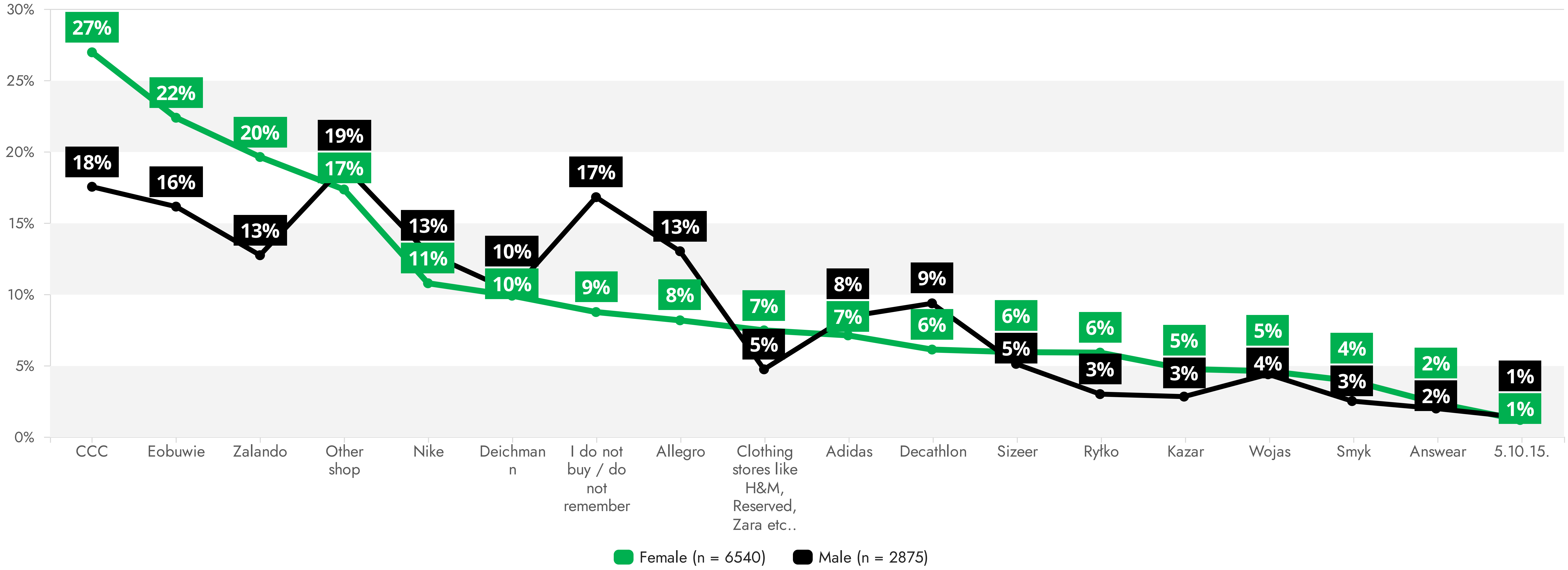


Comparing the results of Omnichannel 2023 with previous editions of the survey, we observe a decrease in the share of people who have not bought shoes recently. We observe an increase in the declaration of purchases by respondents at Eobuwa and Zalando.

WHERE HAVE YOU RECENTLY BOUGHT SHOES?

Analysis by gender

n = 9415



Leading the brands included in the survey is CCC. Men are more likely than women to choose to store at sporting goods stores and are more likely not to buy or remember shopping for shoes.

WHERE HAVE YOU RECENTLY BOUGHT SHOES?

Analysis by gender in 2023 with changes relative to 2022

n 2022 = 11665, 2023 = 9415

	CCC	Eobuwie	Zalando	Other shop	Nike	Deichmann	I do not buy / do not remember	Allegro	Clothing stores like H&M, Reserved, Zara etc..	Adidas	Decathlon	Sizeer	Ryłko	Kazar	Wojas	Smyk	Answear	5.10.15.	Result count
Female	27% -1.9pp	22.4% +3.4pp	19.6% +4pp	17.3% -8pp	10.8%	9.9% -0.7pp	8.7% -2.6pp	8.2% +1.3pp	7.5%	7.1%	6.1%	5.9%	5.9% +0.6pp	4.8% +0.6pp	4.6% +0.4pp	3.9% -0.1pp	2.4%	1.2% -0.3pp	6540
Male	17.5% -4.2pp	16.1% +4.4pp	12.7% +4.8pp	19% -9.1pp	12.9%	10.2% -0.4pp	16.8% -3.7pp	13% -1.2pp	4.7%	8.4%	9.4%	5.1%	3% +0.5pp	2.8% +0.6pp	4.4%	2.5% -1pp	2%	1.4% -0.1pp	2875

WHERE HAVE YOU RECENTLY BOUGHT SHOES?

Analysis by province in 2023 with changes relative to 2022

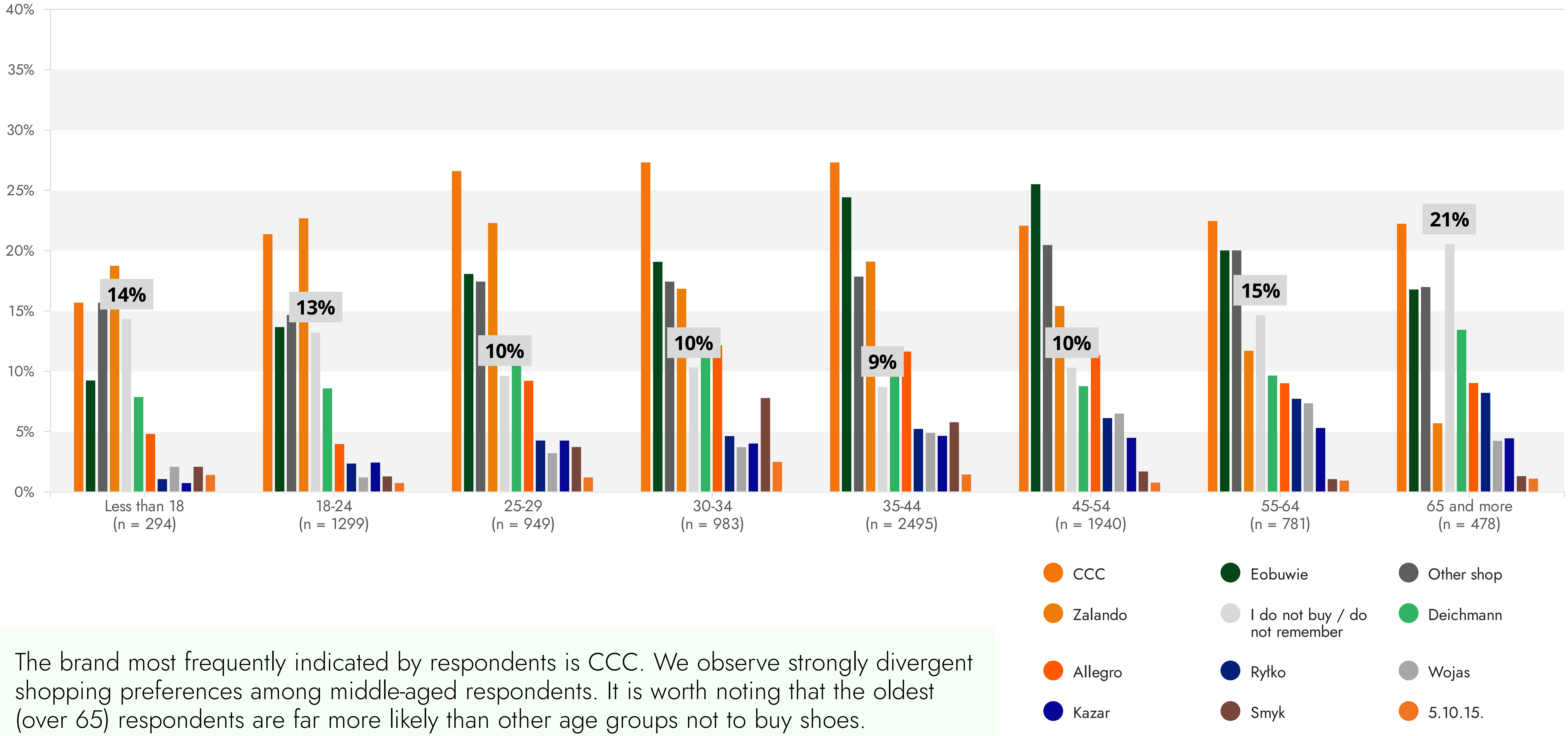
n 2022 = 10904, 2023 = 7648

	CCC	Eobuwie	Other shop	Zalando	Nike	I do not buy / do not remember	Deichmann	Allegro	Adidas	Decathlon	Clothing stores	Sizeer	Ryłko	Wojas	Kazar	Smyk	Answear	5.10.15.	Result count
województwo mazowieckie	20.9% -1.9pp	22.3% +1.3pp	20.4% -7.6pp	19.5% +4pp	12.1%	11.5% -2.8pp	8.5% -1.3pp	9.5% +0.7pp	8.3%	7.6%	6.5%	6.3%	5% +0.7pp	3.9% -0.1pp	4.2% +0.4pp	3.4% +0.1pp	2.3%	1.1%	1754
województwo śląskie	26.8% -2.6pp	18.2% +4.1pp	17.9% -8.7pp	16.3% +5.6pp	9.5%	10.8% -2.3pp	12.3% -0.3pp	9.1% -0.3pp	8.4%	8.7%	7%	6.4%	4.6% -0.2pp	5.2% +0.7pp	3.4% -0.1pp	3.8% -0.9pp	1.4%	1.3% +0.3pp	982
województwo wielkopolskie	25.8% -3.6pp	20.2% +4pp	13% -12.3pp	17.8% +4.8pp	10.9%	11.2% -2.9pp	11.4% +0.6pp	7.8% -1.5pp	7.3%	7.8%	5.3%	4.2%	4.3% +0.5pp	4% +0.5pp	3.1% -1.3pp	2.9% -0.8pp	2.9%	1.4% -0.5pp	833
województwo dolnośląskie	23.6% -4pp	22% +4.3pp	18% -7.5pp	15.7% +4pp	11.5%	8.5% -6.8pp	11.1% -0.1pp	13.5% +3.9pp	8.3%	9%	5.6%	5.3%	4.2% -0.4pp	4.4% -0.3pp	3.6% +1.2pp	2.7% -0.3pp	2.2%	1% +0.4pp	732
województwo małopolskie	20.6% -4.7pp	22.5% +8.7pp	19.3% -8.6pp	19% +5.2pp	11%	11.7% -3.8pp	8.1% -2pp	10.1% +1.1pp	6.8%	6.1%	8.2%	6%	5.7% +1.2pp	5% +0.7pp	3.6% +1pp	2.6% -1.5pp	1.9%	0.6% -0.9pp	720
województwo pomorskie	22.5% -1.1pp	21.5% +5.5pp	16.2% -11.6pp	17.3% +3.9pp	12.6%	10.6% -3.8pp	10.1% +0.4pp	9%	4.7%	6.2%	5.7%	4.7%	5.1% +1.2pp	3.8% +0.5pp	2.9% +0.3pp	3.1% -0.8pp	2.3%	0.3% -0.8pp	613
województwo zachodniopomorskie	23.9% -7.3pp	20.6% +1.9pp	15.4% -9.6pp	19.8% +5.1pp	15.4%	11.1% +0.2pp	7.9% -3pp	9.3% -1.4pp	8.3%	4.3%	6.5%	3.4%	2.4% -1.6pp	3.4% -0.2pp	3.8% +0.8pp	3.4% -1pp	2.2%	0.8% -1.4pp	494
województwo kujawsko-pomorskie	27.9% -4.7pp	21.1% +6.3pp	16% -9.1pp	16.2% +4.7pp	13%	10% -1.3pp	11.7% +0.2pp	11.9% +0.6pp	8.5%	6%	8.1%	7.2%	6.8% +2.4pp	6.2% +1.8pp	4.7% +0.5pp	5.1% +0.2pp	1.3%	1.1%	470
województwo łódzkie	29.5% -1.9pp	21.3% +5.1pp	21.3% -2.3pp	15% +4.9pp	8.4%	10.3% -4pp	10.3% -2pp	7.7% -2.9pp	8.7%	8.7%	7%	7.5%	6.1% +1.5pp	4.2%	6.3% +1.5pp	2.6% -0.6pp	2.6%	1.2% -0.2pp	427
województwo lubelskie	29.2% +2pp	17.6% +5.7pp	21.5% -3.5pp	16.7% +5.8pp	10.6%	10.3% -4.3pp	8.7% -0.5pp	11.2% +1.5pp	6.4%	4.5%	6.7%	3.5%	4.8% +0.6pp	5.1% +0.9pp	6.1% +1.1pp	5.8% +2.1pp	2.6%	1.3% -0.4pp	312

WHERE HAVE YOU RECENTLY BOUGHT SHOES?

Analysis by age

n = 9219

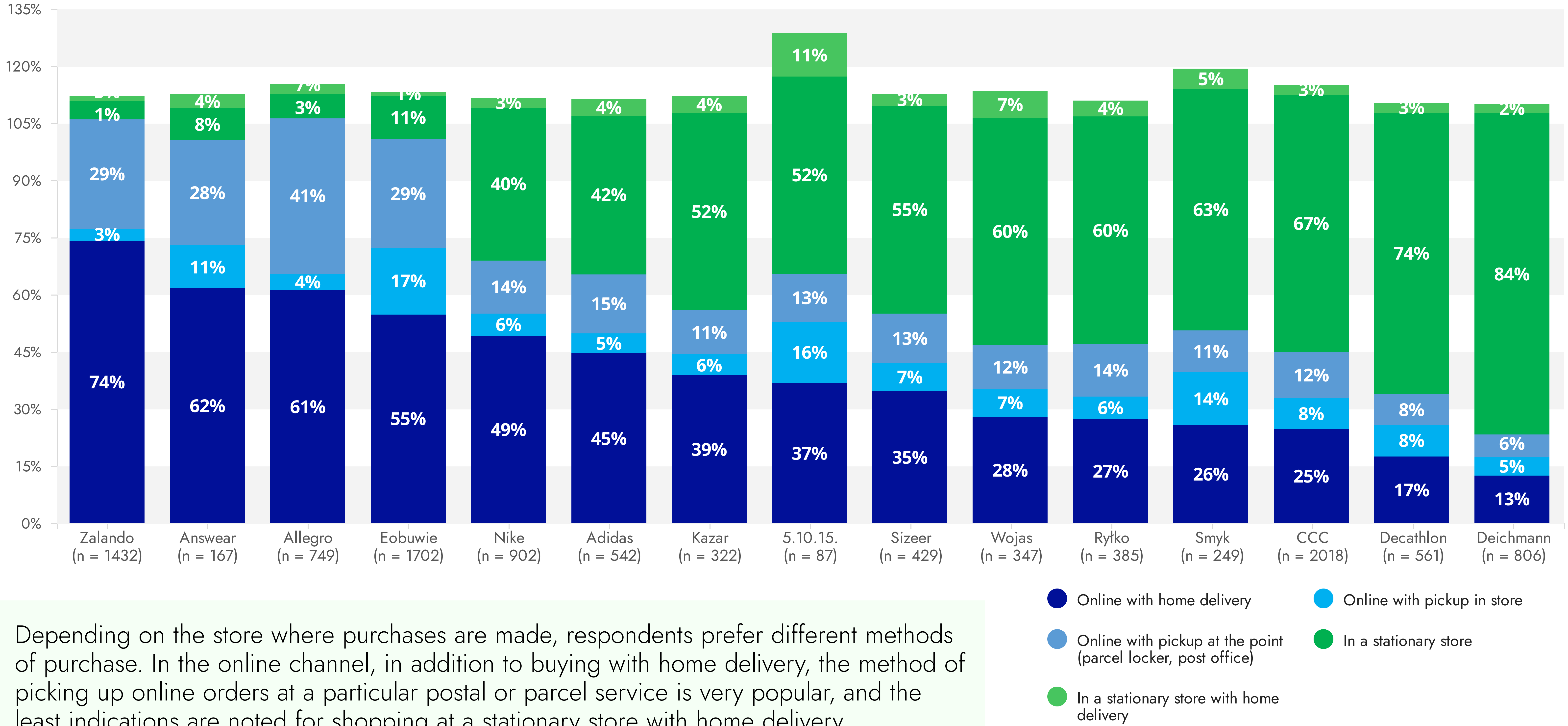


The brand most frequently indicated by respondents is CCC. We observe strongly divergent shopping preferences among middle-aged respondents. It is worth noting that the oldest (over 65) respondents are far more likely than other age groups not to buy shoes.

HOW DID YOU BUY THE PRODUCTS THERE?

Purchasing channel of choice - multiple choice question

n = 6358



Depending on the store where purchases are made, respondents prefer different methods of purchase. 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, and the least indications are noted for shopping at a stationary store with home delivery.

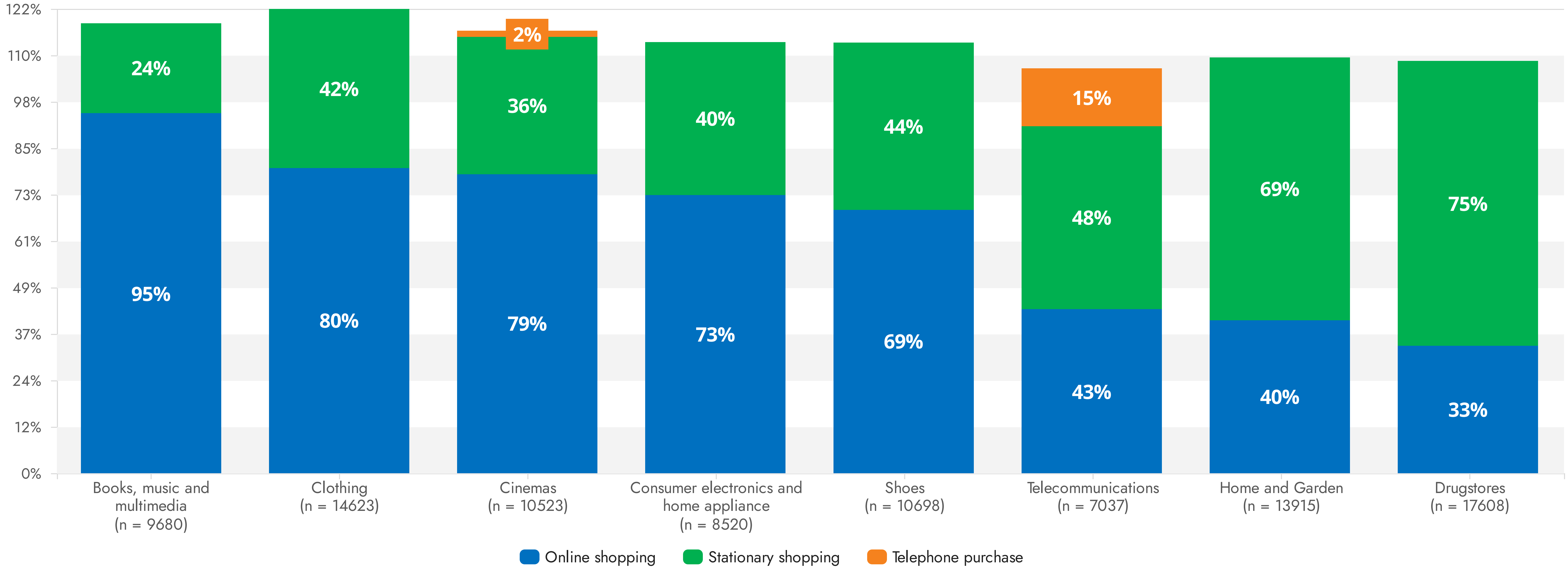
HOW DID YOU BUY THE PRODUCTS THERE?

Purchasing channel of choice - Omnichannel 2023 with changes from 2022

	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
CCC	24.7% +6.4pp	8.3% +5.9pp	12% +4.6pp	67.3% -2.9pp	2.8% +1.1pp	2018
Eobuwie	54.8% +3.3pp	17.5% +4.3pp	28.6% +3.2pp	11.4% +2.1pp	1.1% +0.4pp	1702
Zalando	74.1%	3.3% +0.8pp	28.6% +8.4pp	4.9% +2.4pp	1.3% +0.7pp	1432
Deichmann	12.5% +3.6pp	4.8% +1.3pp	6% +2.8pp	84.4% +3pp	2.4% -0.6pp	806
Allegro	61.3% +4.3pp	4.1% +3.1pp	40.9% +4pp	6.5% +2.4pp	2.5% +1.5pp	749
Ryłko	27.3% +7pp	6% +1.1pp	13.8% +5.5pp	59.7% -3.6pp	4.2% +1pp	385
Wojas	28% -1.8pp	7.2% +3.3pp	11.5% +5.2pp	59.7% +1.7pp	7.2% +5.2pp	347
Kazar	38.8% +2.3pp	5.6% +0.1pp	11.5% +4.5pp	51.9% +6pp	4.3% -0.9pp	322
Smyk	25.7% +4.9pp	14.1% +1pp	10.8% +6.3pp	63.5% +5.2pp	5.2% +1.9pp	249
5.10.15.	36.8% +1pp	16.1% +4.7pp	12.6% +1.2pp	51.7% +16.7pp	11.5% +5pp	87

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

Comparison of channels chosen between industries

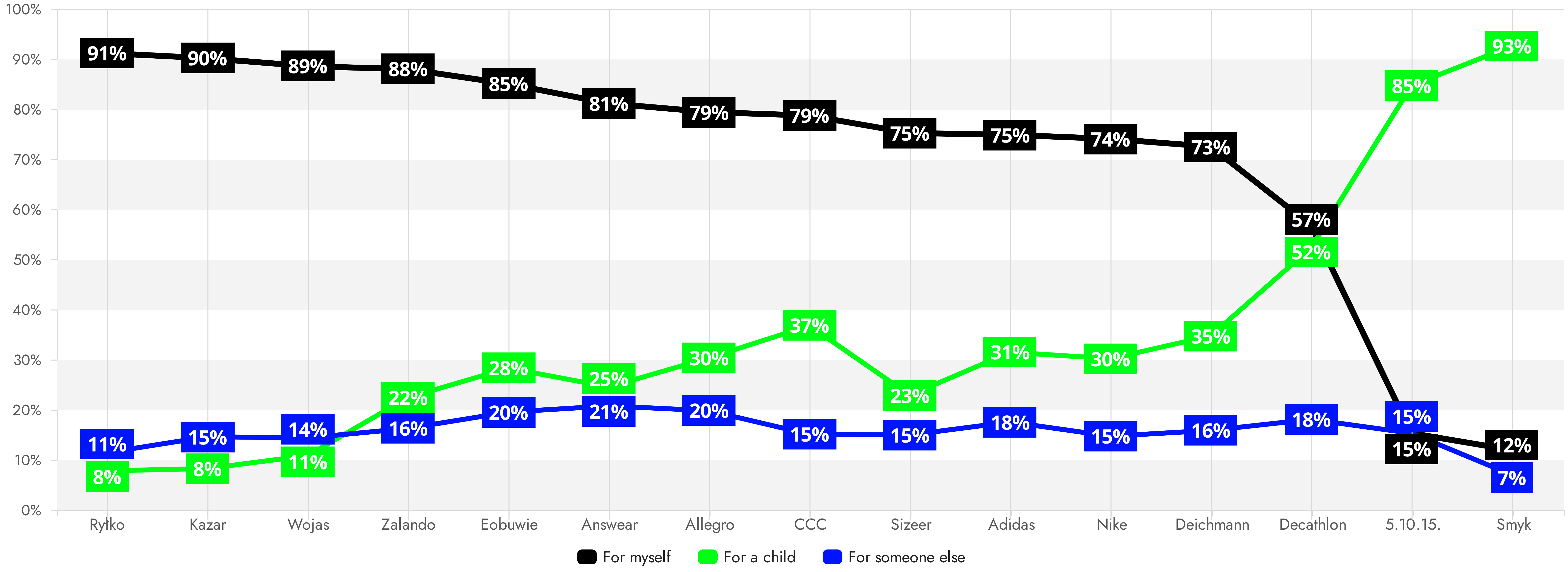


Comparing the methods of purchasing footwear with the industries studied in Omnichannel 2023, it is apparent how large a share of sales are made in stationary and how little potential has been left for growth in online sales.

FOR WHOM HAVE YOU BOUGHT SHOES?

Single-choice question

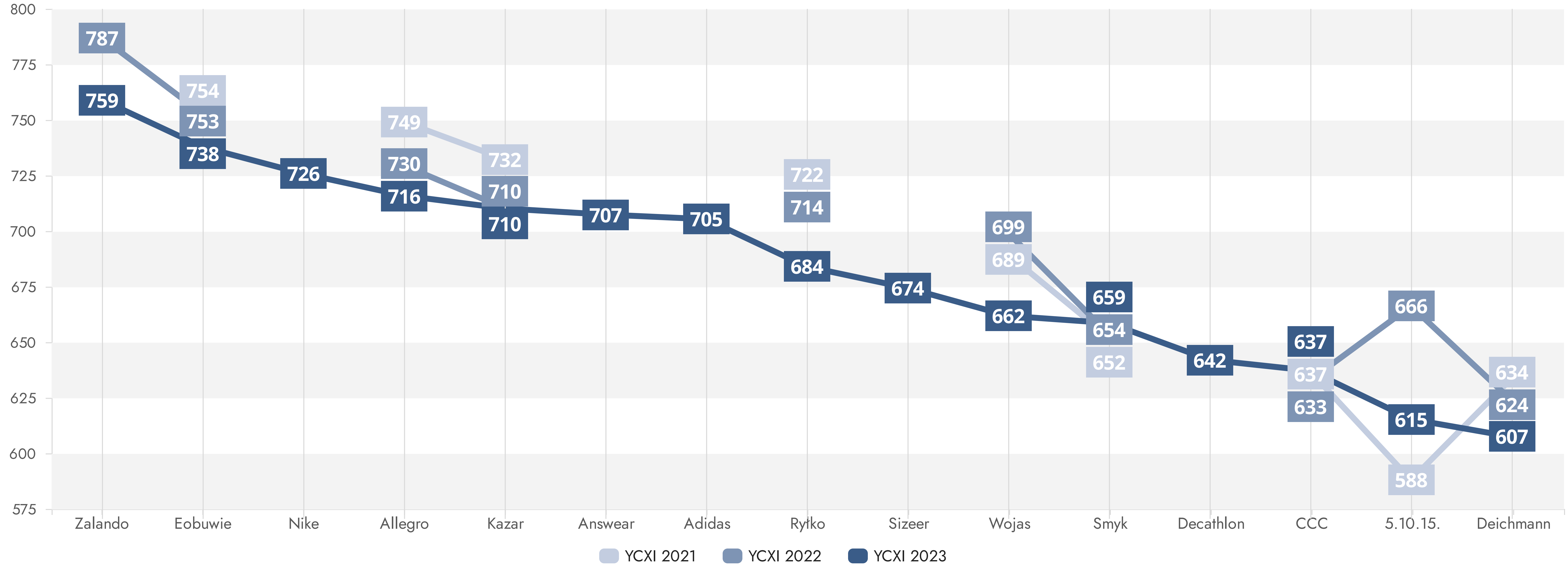
n = 6287



EXPERIENCE QUALITY INDICATORS

YOUR CUSTOMER EXPERIENCE INDEX

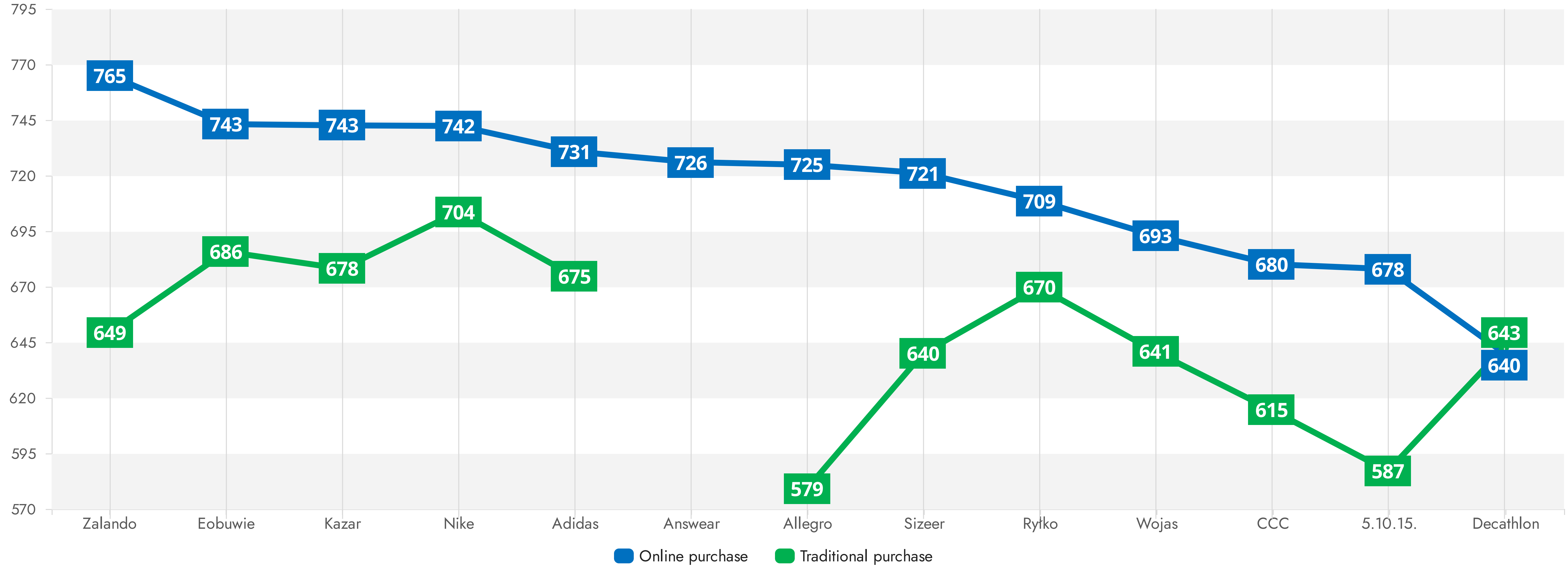
Quality index on a scale of 0 to 1000 taking into account four satisfaction factors:
availability and selection of products, ease of ordering, satisfaction with purchase, willingness to recommend the store to friends



The Your Customer Experience Quality Index is designed to more easily differentiate between companies scoring similarly on sub-questions as well as to identify real quality leaders on a scale of 0 to 1,000. The results are generally good, since half of the companies scored over 700. The industry leaders are Zalando, Eobu Shoes and Nike. Almost all surveyed entities have scores lower than a year ago, the exceptions being Smyk and CCC.

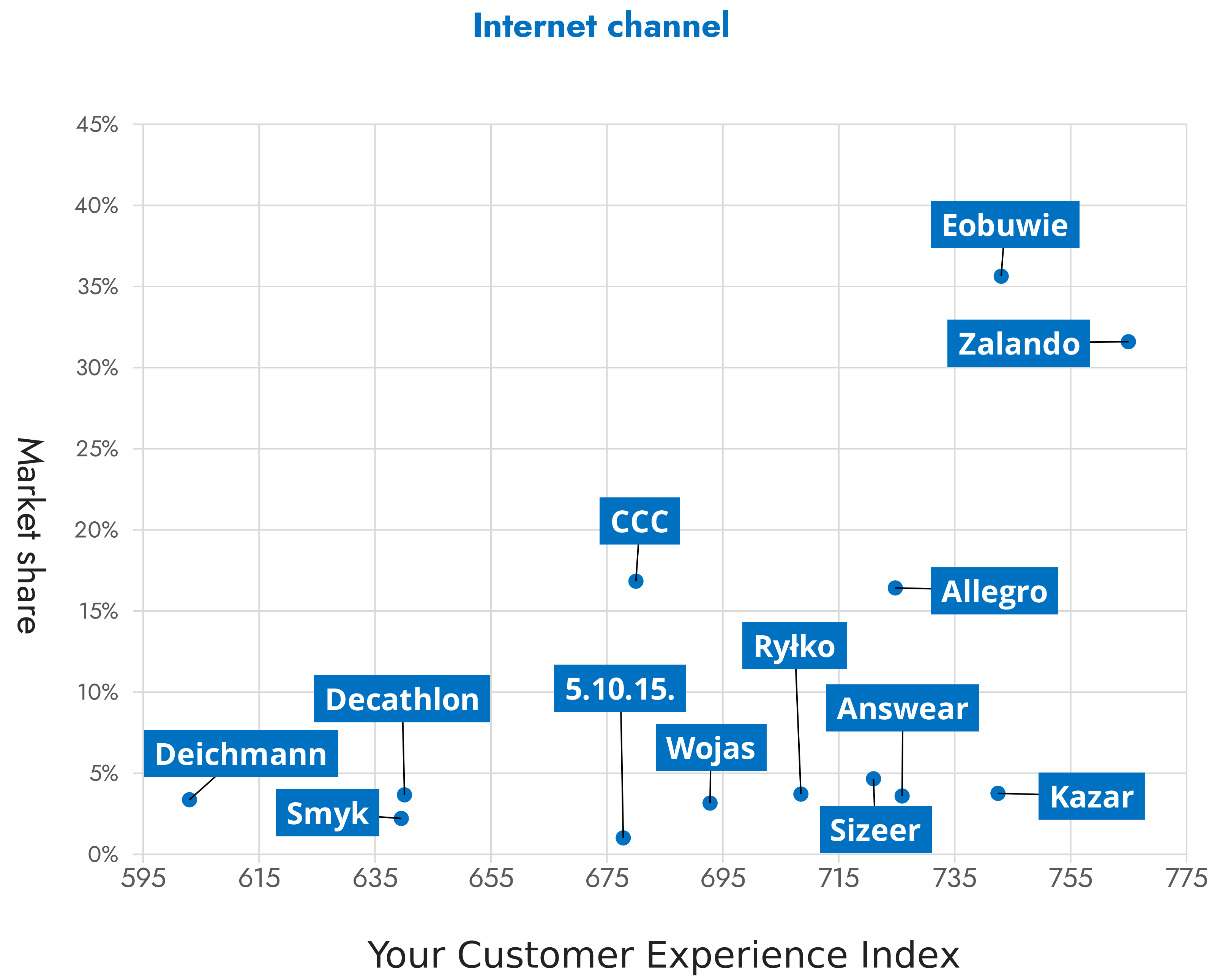
YOUR CUSTOMER EXPERIENCE INDEX

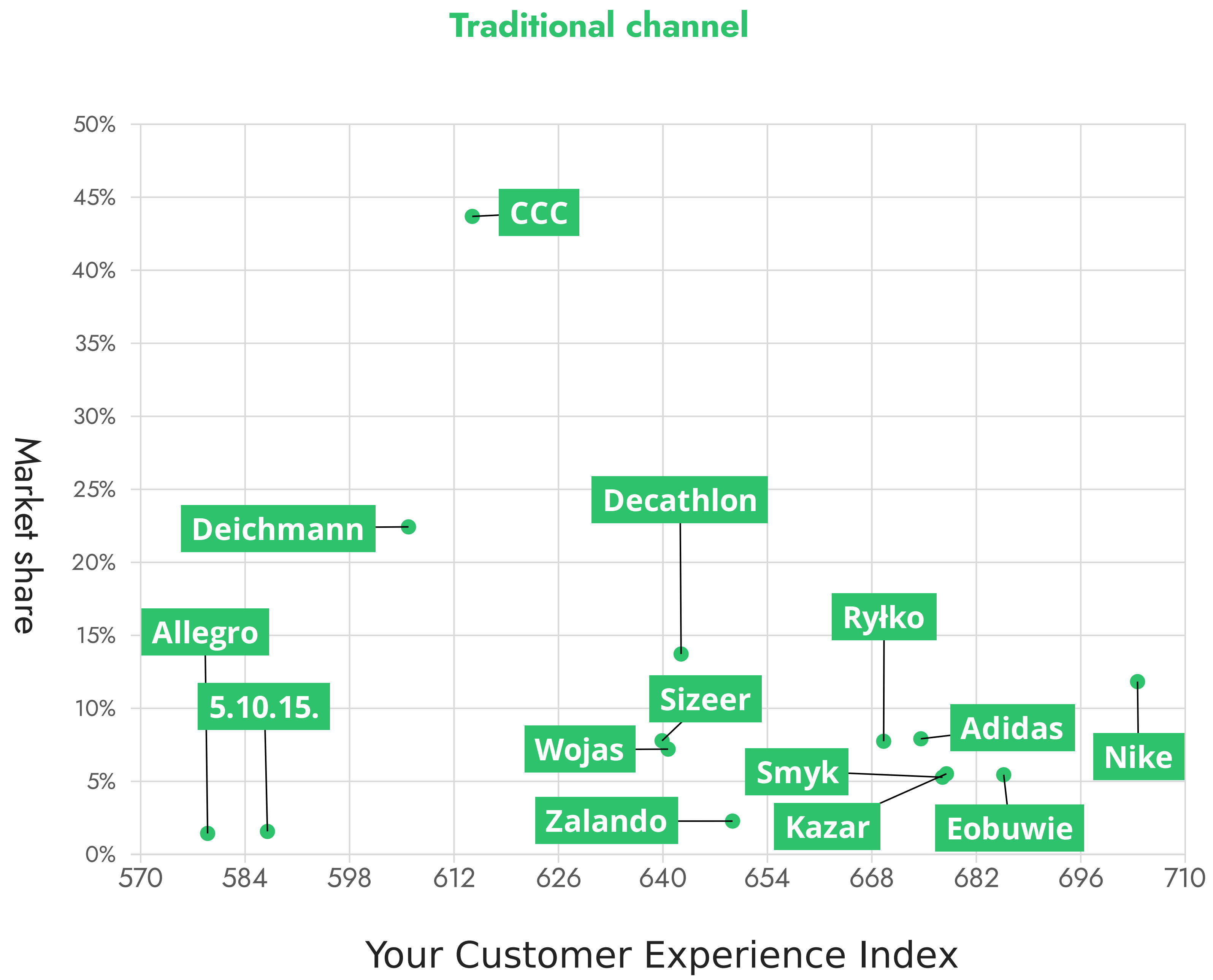
Quality index on a scale of 0 to 1000, broken down by purchasing channel



It is noteworthy that respondents rate the online shopping experience more positively than those from traditional sales, Decathlon being the exception to this rule. Zalando boasts the highest quality rating in the online channel, while Nike boasts the highest quality rating in the traditional sales channel.

YOUR CUSTOMER EXPERIENCE INDEX

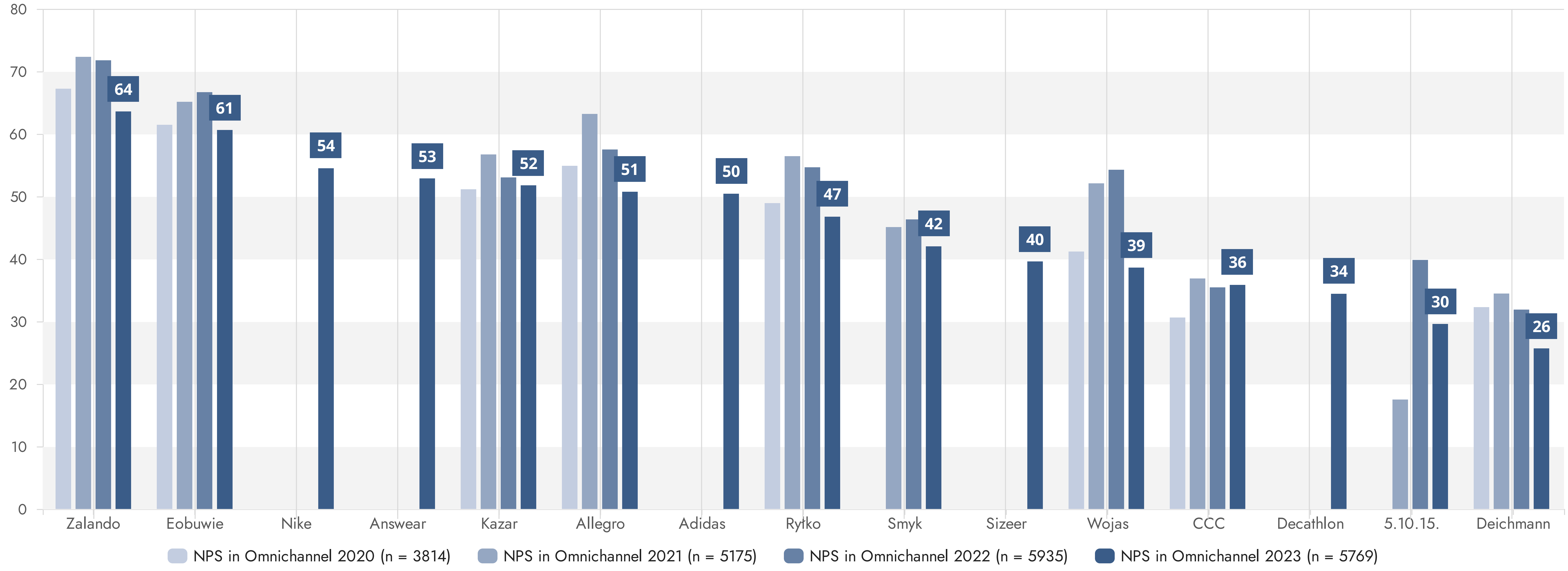




The charts show market shares by sales channel and Your Customer Experience Index value. The online channel is dominated by Eobu Shoes with the largest market share and Zalando with the highest value of the index. In the stationary channel, CCC has the largest share, and the leading position in this area of experience is held by Nike.

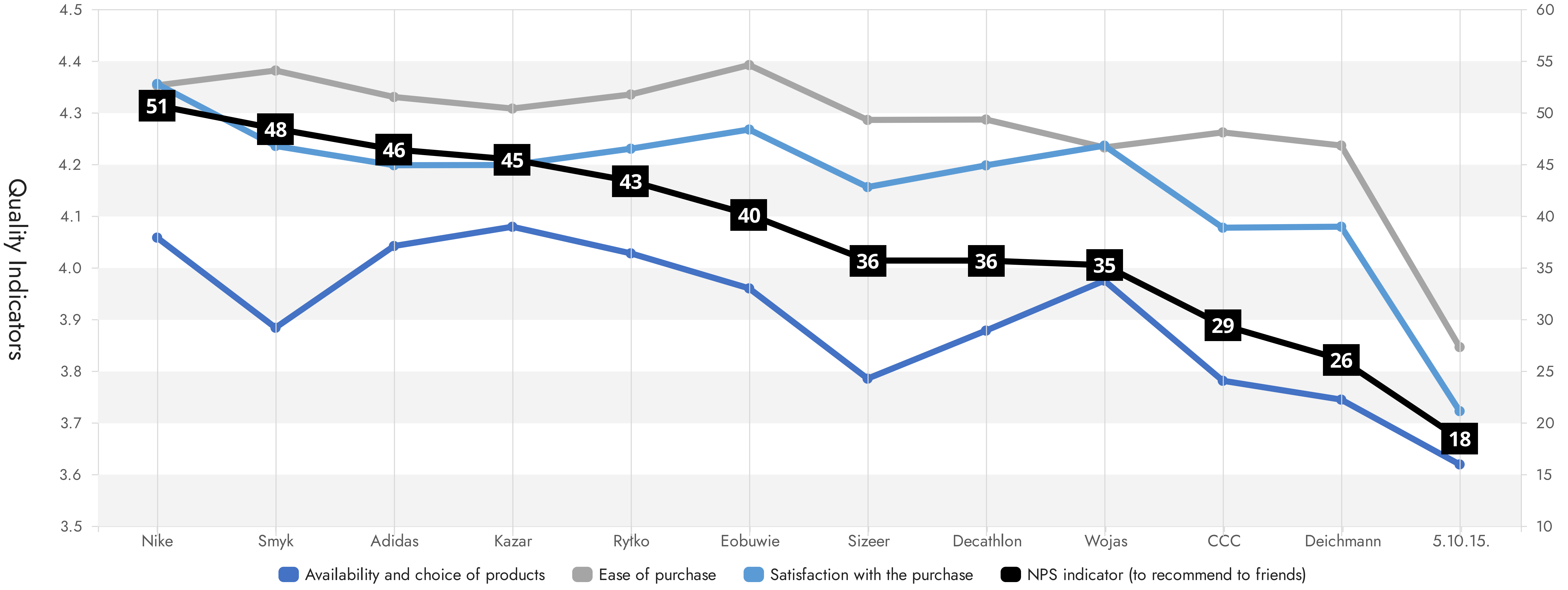
HOW LIKELY ARE YOU TO RECOMMEND THESE STORES TO YOUR FRIENDS?

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



TRADITIONAL CHANNEL - EXPERIENCE QUALITY RATINGS

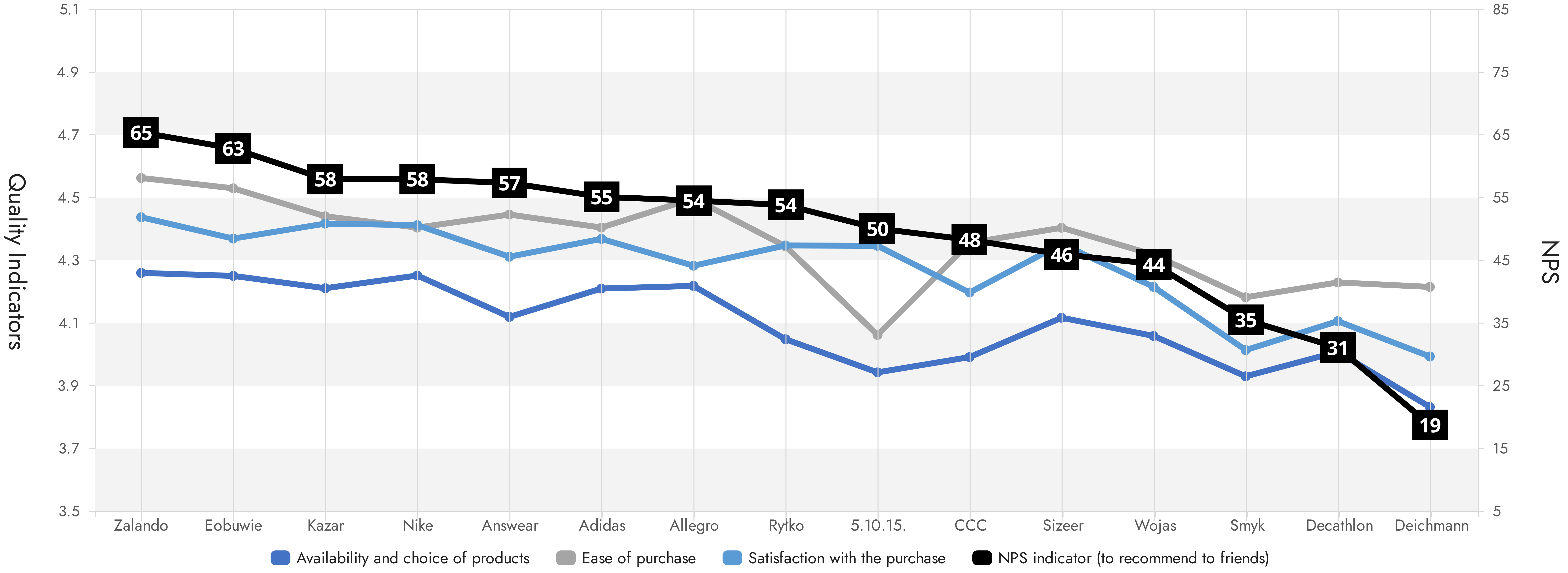
Quality ratings on a scale of 1 to 5 and NPS index on a scale of -100 to 100



We record the highest NPS in the traditional channel for the Nike brand, where the index is correlated with high ratings for overall satisfaction with and ease of purchase. We record the lowest indicator value for 5.10.15.

ONLINE CHANNEL - EXPERIENCE QUALITY RATINGS

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



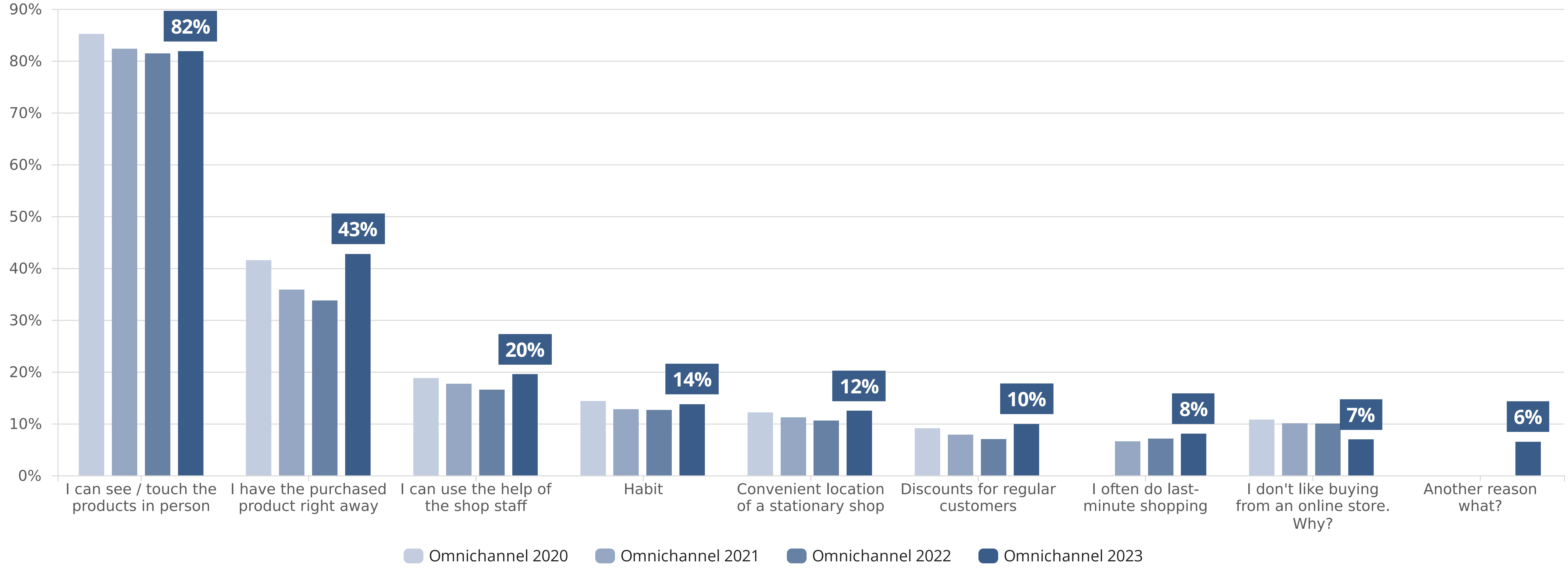
Analyzing individual aspects of the experience against the NPS indicator, we observe the strength of the Zalando and Eobuwie brands. The lowest recommendation index was given to the Deichmann brand, which is correlated with a low rating of product availability and selection.

SHOPPING PREFERENCES IN THE STATIONARY CHANNEL

WHY DO YOU PREFER TO BUY SHOES IN A STATIONARY SHOP?

Traditional channel - Multiple choice question

n 2020 = 2625, 2021 = 3486, 2022 = 3611, 2023 = 2085



WHY DO YOU PREFER TO BUY SHOES IN A STATIONARY SHOP?

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

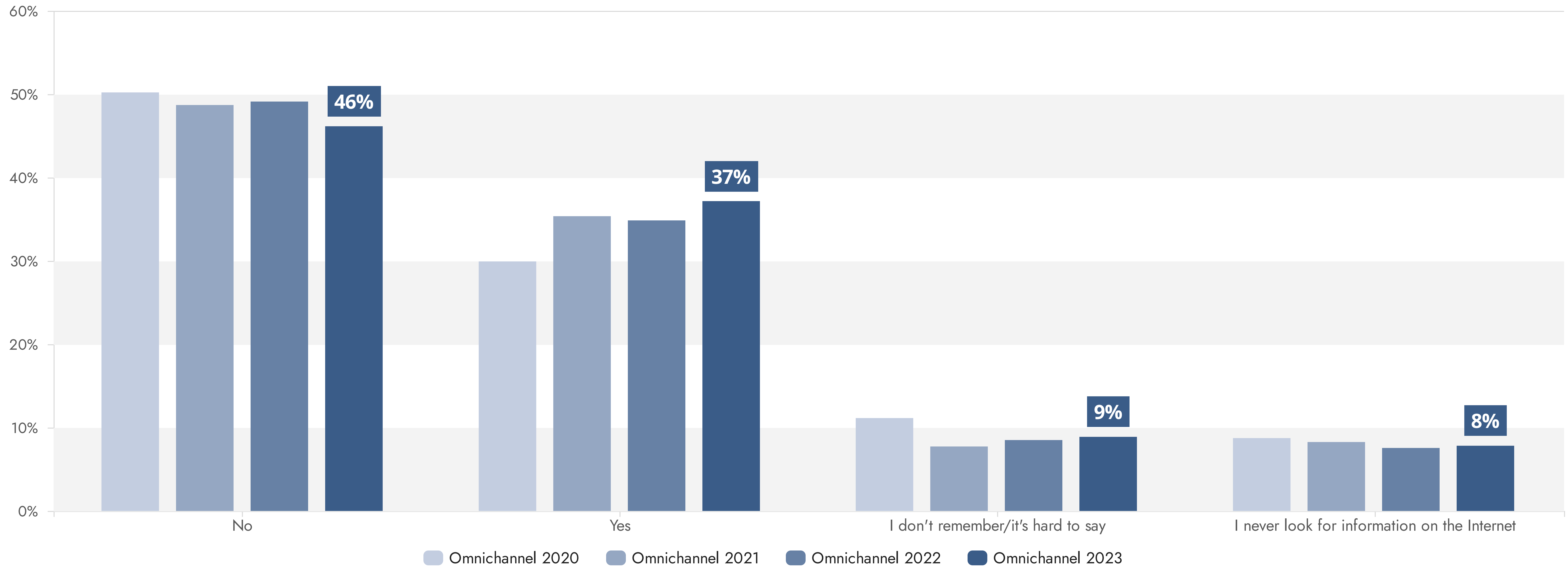
n = 2085

	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 often do last-minute shopping	I don't like buying online	Another reason what?	Result count
I can see / touch the products in person		20.2%	9.5%	44.8%	12.8%	11.9%	7.4%	6.3%	4.8%	1706
I can use the help of the shop staff	84.8%		21.4%	62.4%	26.8%	20.1%	11.1%	9.3%	3.7%	407
Discounts for regular customers	78.6%	42.2%		59.7%	29.1%	21.4%	16%	5.8%	1.9%	206
I have the purchased product right away	85.8%	28.5%	13.8%		18.5%	17.4%	12%	7.8%	4.2%	890
Convenient location of a stationary shop	83.8%	41.9%	23.1%	63.5%		26.5%	21.2%	11.2%	3.8%	260
Habit	71%	28.7%	15.4%	54.2%	24.1%		15.7%	6.6%	1.7%	286
I often do last-minute shopping	76%	26.9%	19.8%	64.1%	32.9%	26.9%		6%	3.6%	167

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

Traditional channel - Single-choice question

n 2020 = 1203, 2021 = 1514, 2022 = 1578, 2023 = 1125

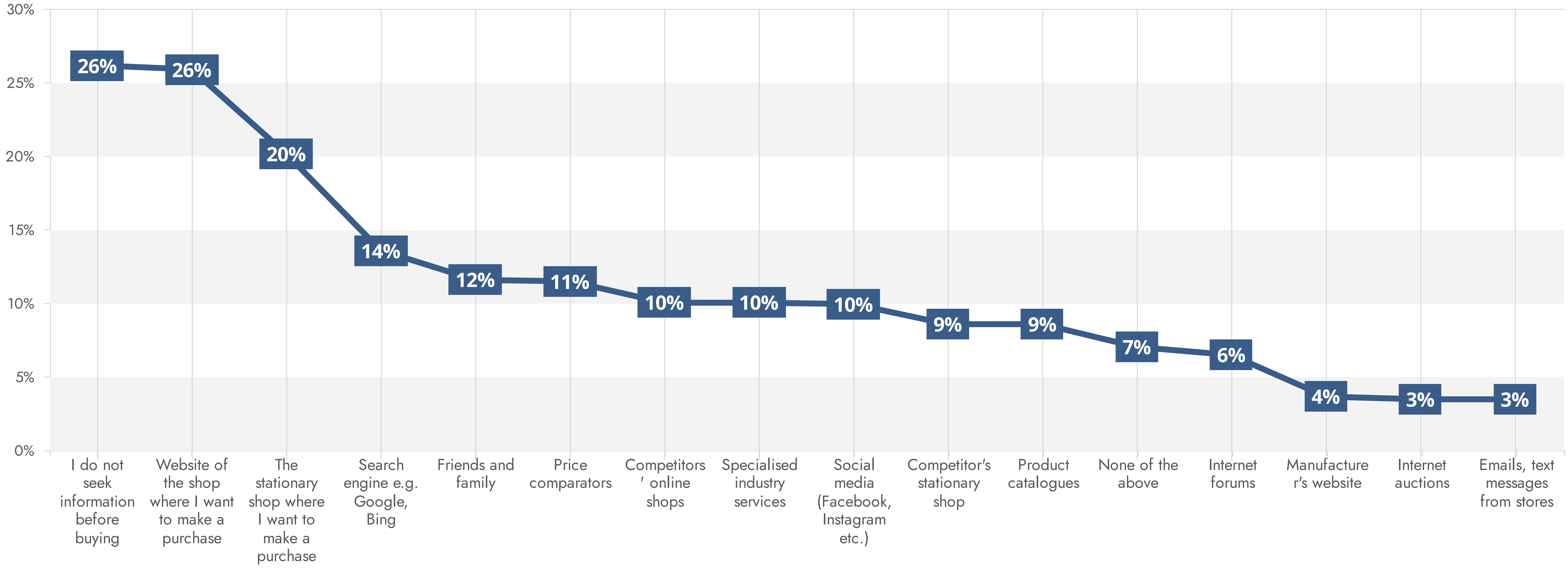


We observe a slight increase in indications, with respect to the last edition of the survey, for the answer "yes" and "I don't remember/it's hard to say." - Respondents are more likely to look to the Internet for product information, opinions or to compare a product with others.

WHERE DO YOU OBTAIN PRODUCT INFORMATION BEFORE PURCHASE?

Traditional channel - Multiple choice question

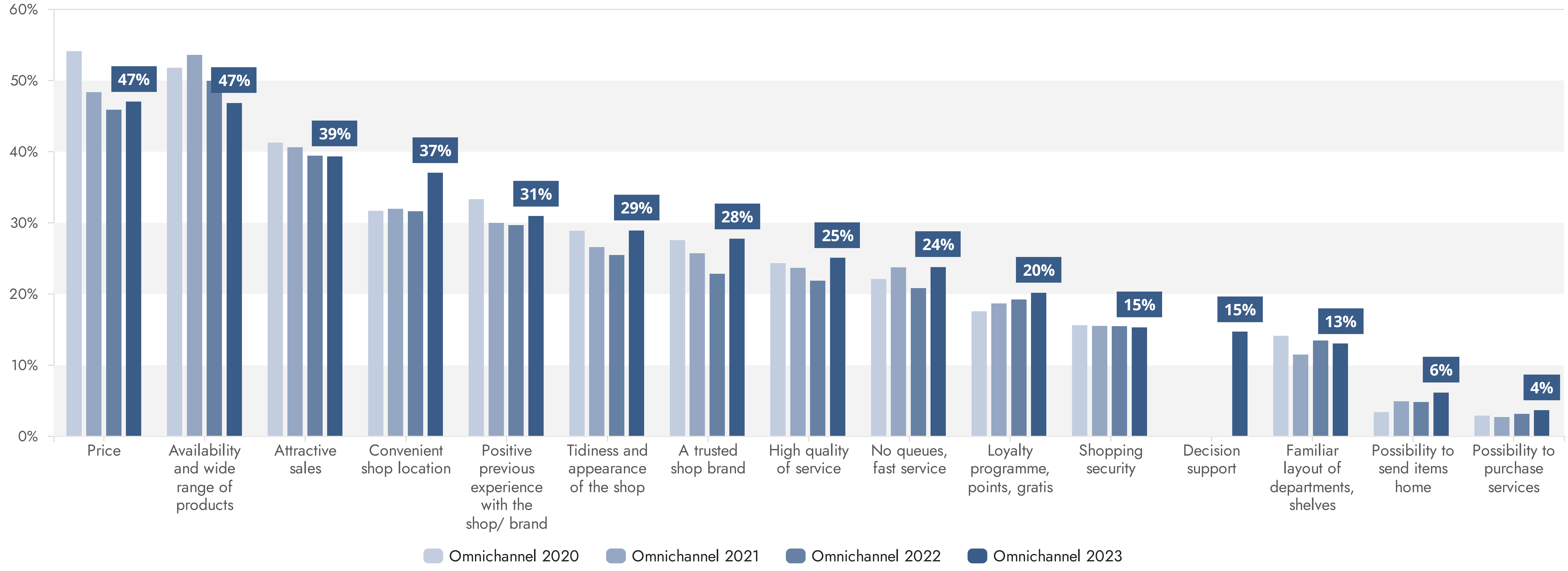
n = 1097



WHAT IS MOST IMPORTANT TO YOU WHEN SHOPPING FOR SHOES IN A STATIONARY STORE?

Traditional channel - Multiple choice question

n 2020 = 990, 2021 = 1263, 2022 = 1331, 2023 = 971

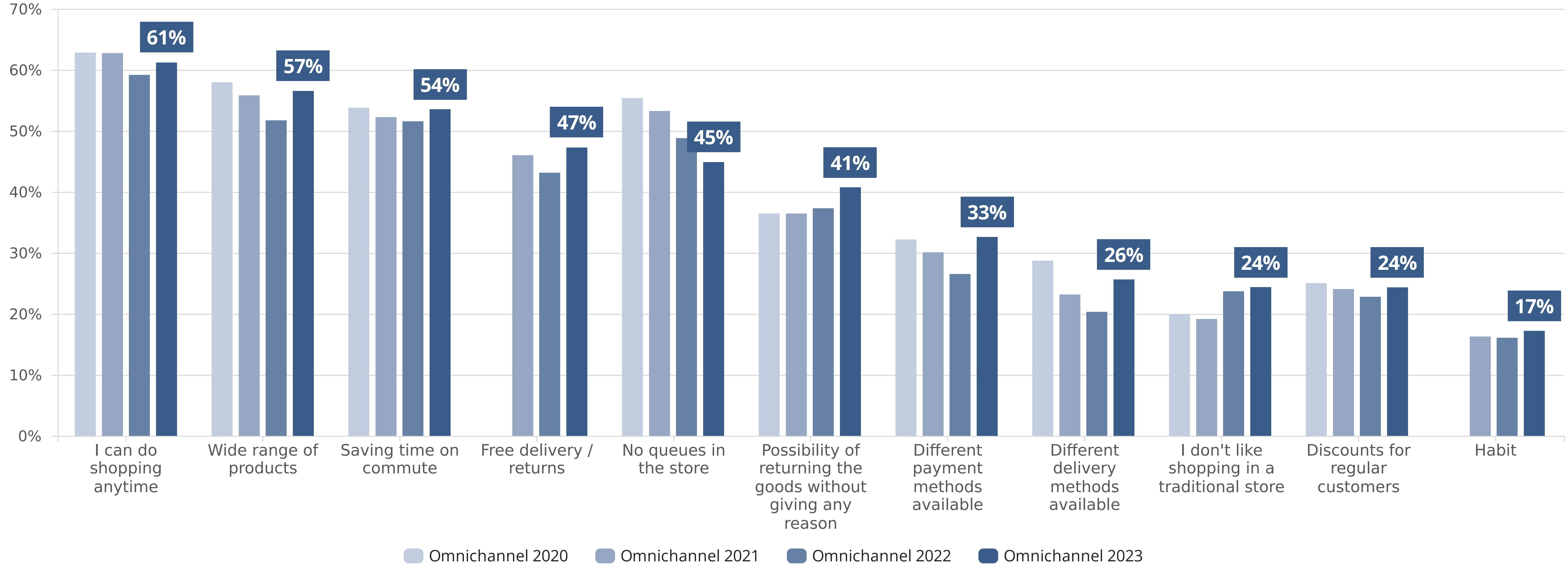


SHOPPING PREFERENCES IN THE ONLINE CHANNEL

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

Internet channel - Multiple choice question

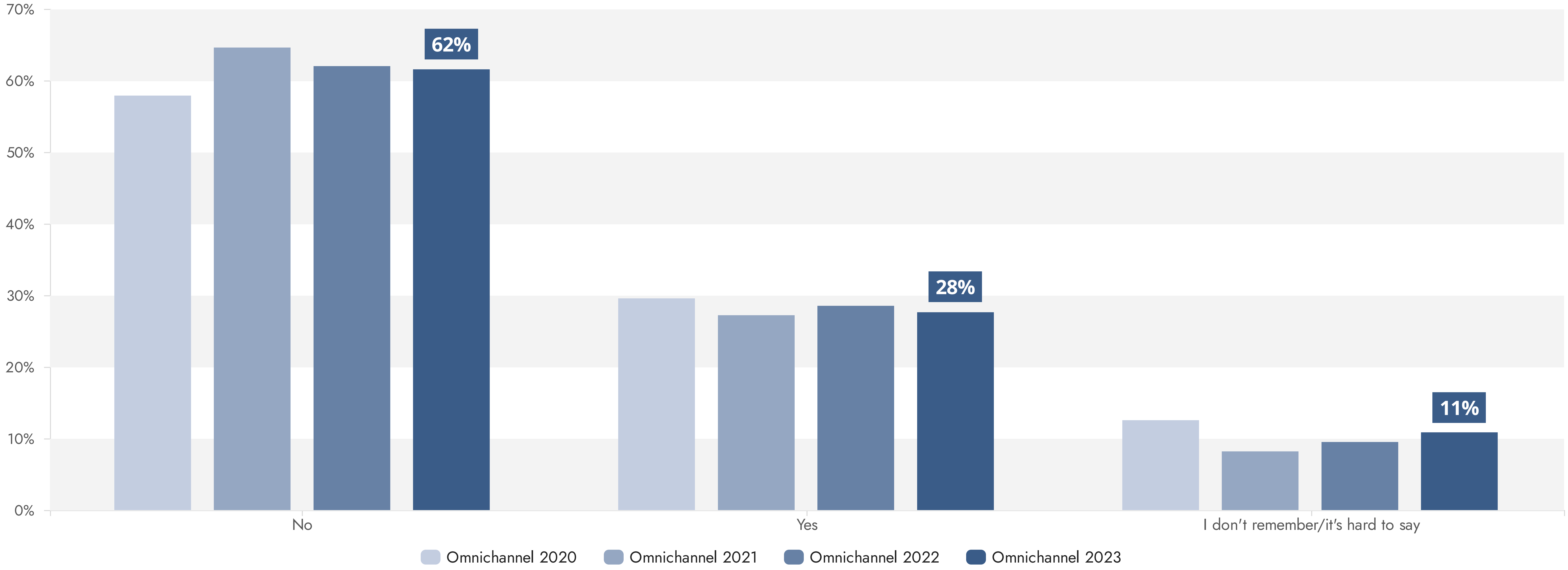
n 2020 = 1084, 2021 = 1776, 2022 = 2143, 2023 = 1703



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

Internet channel - One-choice question

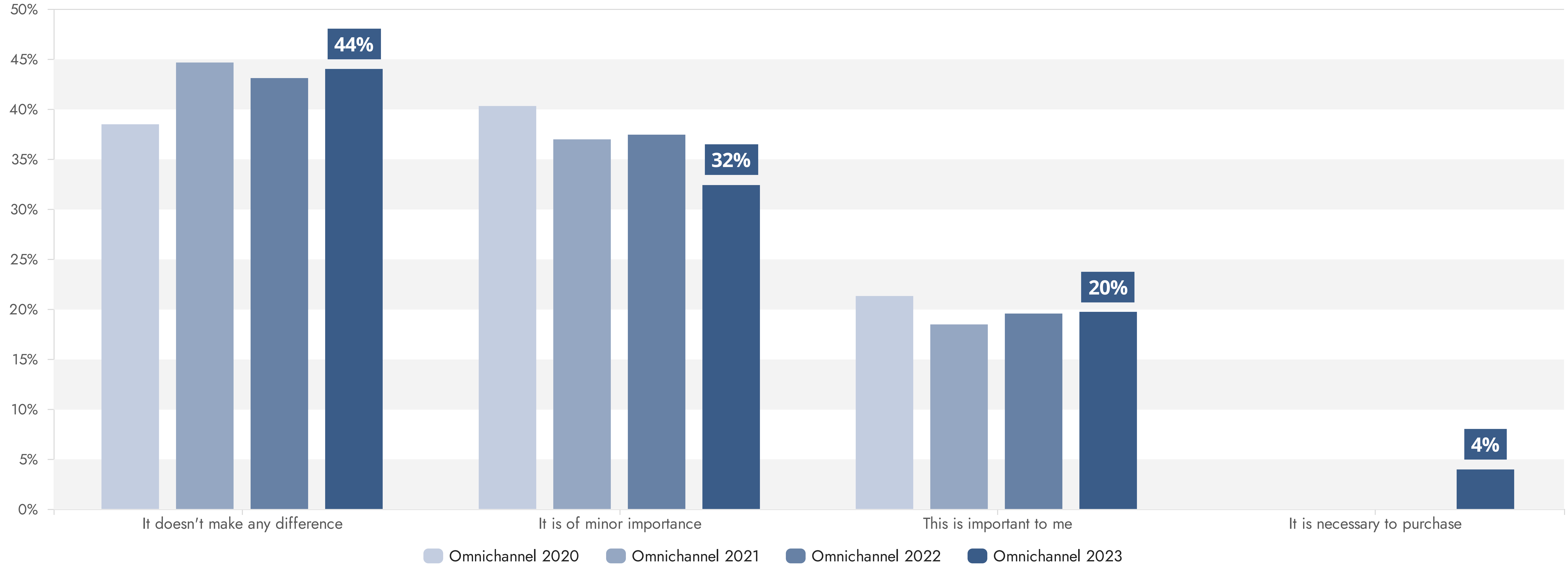
n 2020 = 1292, 2021 = 1782, 2022 = 2023, 2023 = 1778



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

Internet channel - Multiple choice question

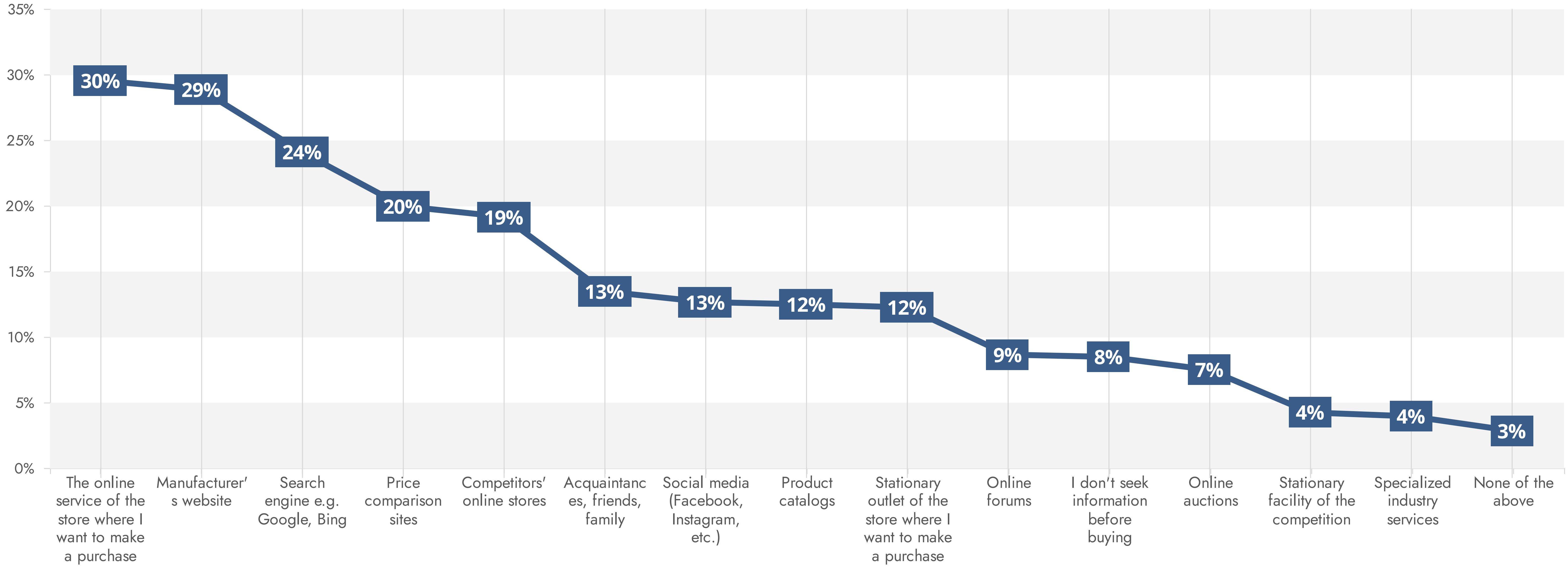
n 2020 = 1269, 2021 = 1746, 2022 = 1962, 2023 = 1730



WHERE DO YOU OBTAIN PRODUCT INFORMATION BEFORE PURCHASE?

Internet channel - Multiple choice question

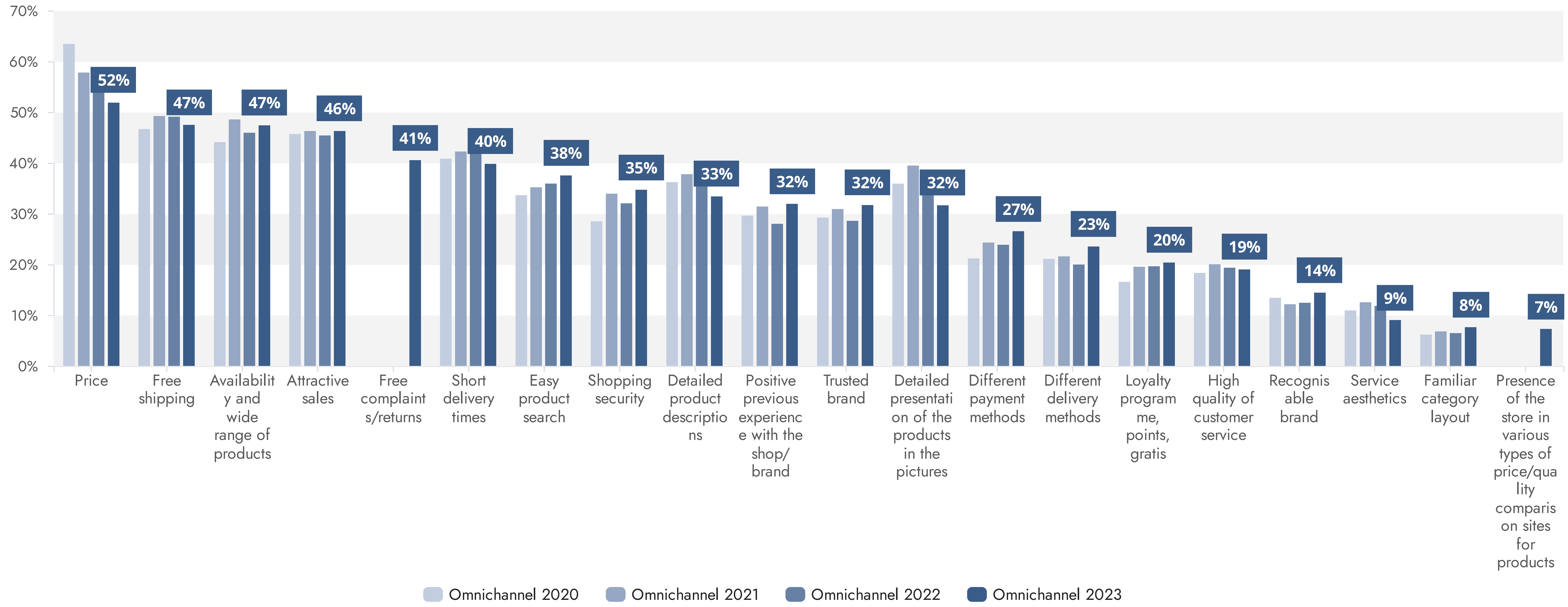
n = 1723



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

Internet channel - Multiple choice question

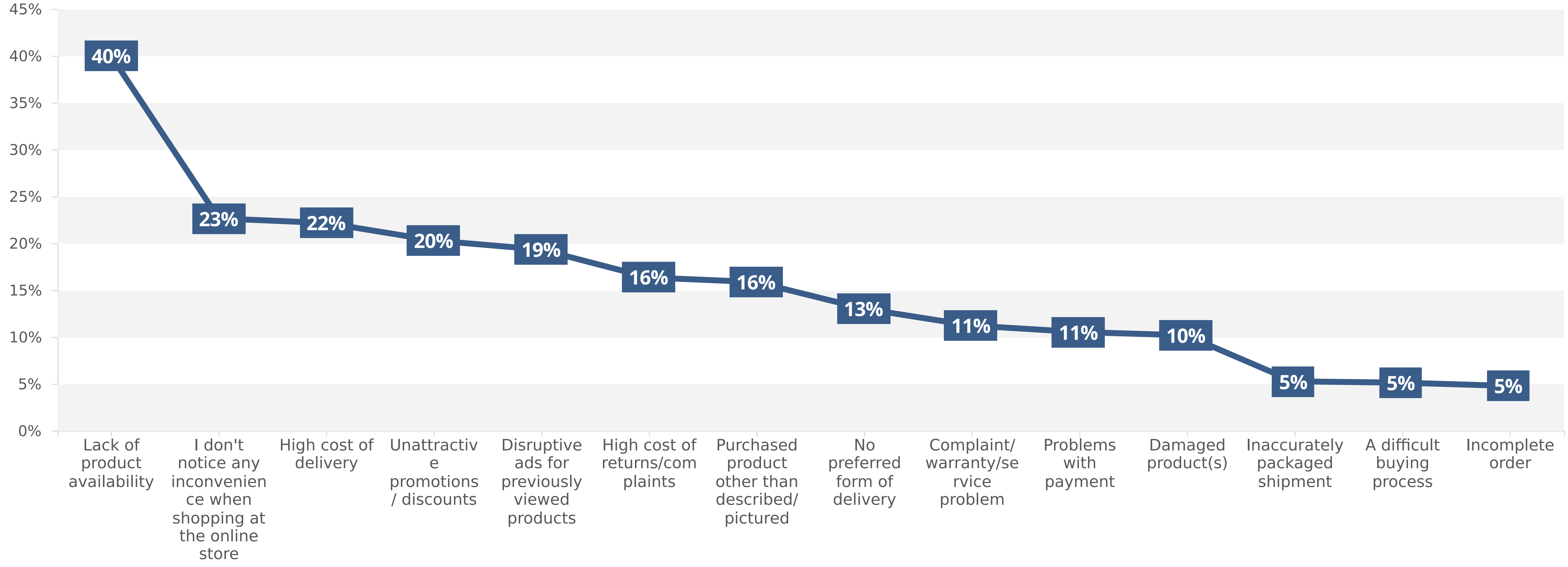
n 2020 = 1044, 2021 = 1475, 2022 = 1640, 2023 = 1528



Analyzing the data in a historical perspective, one can see a trend in which the price of a product is less and less chosen by respondents every year, while the ease of searching for products is steadily increasing.

Internet channel - Multiple choice question

n = 1444



Internet channel - Multiple choice question. Analysis by age and gender.

n = 1444

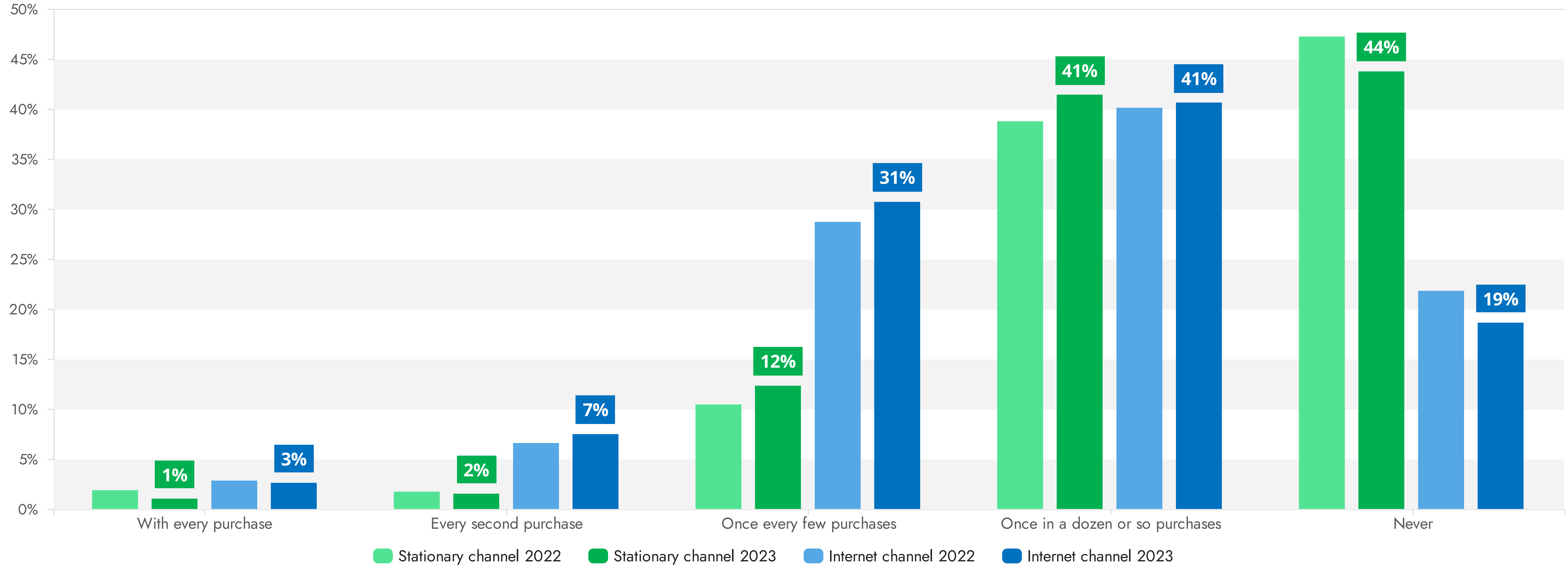
	Lack of product availability	I don't notice any inconvenience when shopping at the online store	High cost of delivery	Unattractive promotions / discounts	Disruptive ads for previously viewed products	High cost of returns/complaints	Purchased product other than described/ pictured	No preferred form of delivery	Complaint/ warranty/service problem	Problems with payment	Damaged product(s)	Inaccurately packaged shipment	A difficult buying process	Incomplete order	Result count
Female	40.5%	22.5%	23.7%	19.1%	19.6%	17.8%	16.8%	13.3%	10.4%	10.2%	10.6%	5.6%	4.7%	4.6%	1105
Male	37.5%	23.7%	17.2%	23.7%	17.8%	11.4%	12%	12%	14.5%	11.7%	9.2%	4.3%	6.8%	5.5%	325
Less than 18	57.1%	3.6%	39.3%	39.3%	17.9%	14.3%	14.3%	14.3%	7.1%	28.6%	7.1%	14.3%	10.7%	7.1%	28
18-24	49.7%	12.8%	27.3%	24.6%	20.9%	11.8%	12.8%	12.8%	13.9%	10.7%	16.6%	11.2%	4.8%	5.9%	187
25-29	41.2%	16.2%	25.7%	20.6%	22.8%	23.5%	14.7%	16.9%	14%	14.7%	14.7%	11%	7.4%	5.9%	136
30-34	45.5%	12.9%	32.6%	27.3%	26.5%	23.5%	19.7%	15.9%	25%	9.8%	15.9%	3%	7.6%	3%	132
35-44	36.5%	23.8%	19.4%	16.8%	18.9%	15.5%	16.3%	11.7%	9.1%	10.1%	9.6%	4.1%	3.4%	4.1%	386
45-54	40.5%	26.1%	20.1%	21%	17.3%	16.4%	16.1%	13.6%	8.5%	10.8%	7.1%	3.1%	5.7%	4.5%	353
55-64	30.6%	31.5%	12.9%	16.9%	19.4%	15.3%	16.1%	9.7%	5.6%	6.5%	3.2%	1.6%	3.2%	7.3%	124
65 and more	21.9%	51.6%	14.1%	6.3%	9.4%	9.4%	15.6%	9.4%	12.5%	6.3%	6.3%	3.1%	3.1%	1.6%	64

POST-PURCHASE EXPERIENCE

HOW OFTEN DO YOU FIND YOURSELF RETURNING FOOTWEAR (COMPLAINT/RETURN/EXCHANGE)?

Single-choice question

n fixed channel = 983, internet channel = 1499

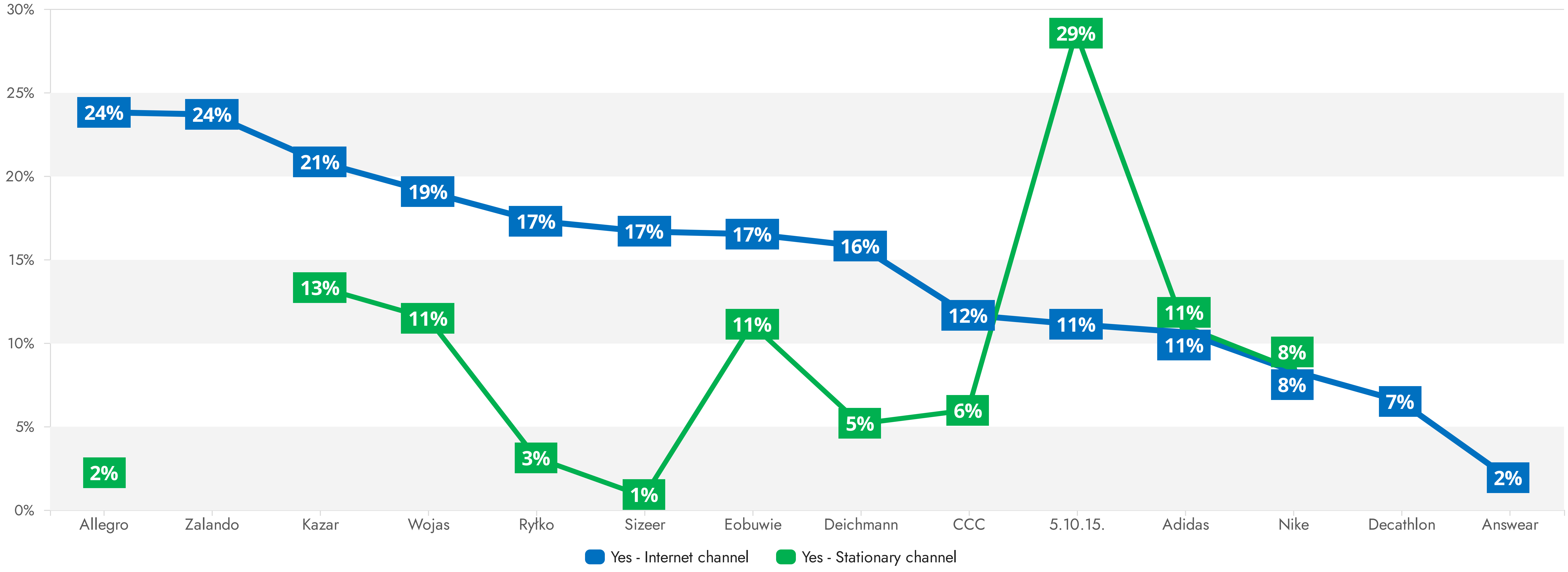


The distribution of responses compared to last year's survey is similar. The footwear industry shows a higher share of product returns and exchanges in the online channel than in the traditional sales channel. It is noteworthy that the share of people who never return shoes has decreased.

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 = 1538, n traditional store = 1054



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

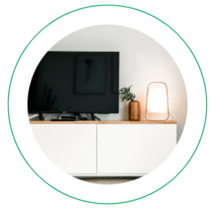

Drugstores


Footwear


Pharmacies


Telecommunicatic


Home and garden


CONSUMER ELECTRONICS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