YourCX

REPORT

OMNI CHA NNEL 2023

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Observing the strengthening trend of online shopping, we also see the intensification of competition in this field. We are wondering how to convince the customer to choose just our store? Maintaining the growth of market share is becoming more and more challenging, as not only the product itself and its price influence the purchase decision, but also all the accompanying circumstances. The entire customer experience along the purchase path, i.e. the presentation, convenience and security of the transaction, the return/exchange option, as well as the quality of post-sale support, affect the customer's perception and inclination to use or recommend a particular retailer again in their neighborhood.

Analysis of the omnichannel customer experience reveals a comprehensive picture of the challenges facing store owners in today's highly customer-centric environment. One of the key elements of such experiences is the need to ensure consistency and seamlessness between the various channels of customer interaction - both online and offline. Looking at the growing competition, everyone is wondering how to deliver the best possible shopping experience to their customers to build a lasting relationship with them and ensure their loyalty.

Because the OMNICHANNEL survey is produced periodically, we can compare results up to five years back and draw conclusions based on long-term trends. In addition, the survey is conducted on a large percentage of Polish Internet users, which allows for detailed in-depth analysis while maintaining the relevance of the results and large samples.

I would like to say a big thank you to our Partners and everyone who participated in the implementation of OMNICHANNEL2023. I hope that the collected results will help to better understand shoppers as well as encourage everyone to further develop Customer Experience programs that ultimately serve us all.

Piotr Wojnarowicz
YourCX CEO

METHODOLOGY RESEARCH

- Quantitative qualitative data collected **anonymously and voluntarily**, without gratification to respondents;
- Survey possible to participate and complete **online** only **once**;
- Survey target group corresponding to a cross-sectional profile of Internet users in Poland;
- Reach of over **2,600,000 consumers** obtained through survey partners;
- More than **250,000 completed** surveys;
- **Multi-page** survey consisting of cascading questions, no mandatory questions, with demographic questions at the beginning;
- **Standardized** question sets for each segment with a limit of 2 segments per survey;
- Common NPS methodology measure for offline and online shopping;
- Implementation of the survey: **August-September 2023**;
- Selected e-commerce segments reflect the industries of YourCX's key projects;
- **Survey partners**: Pharmacy-Melissa, Audioteka, CCC, eobuwie, Leroy Merlin, Modivo, Multikino, Play, Sephora, Super-Pharm;
- The data presented in the report comes from the websites of the survey partners other than the industry partner;
- The survey will be summarized in the form of separate reports for each industry analyzed;

YOUR CUSTOMER EXPERIENCE INDEX

The purpose of the creation of the Your Customer Experience Index was to better differentiate companies with similar results and to identify real experience leaders.

Therefore, only extremely good experiences (rating sensationally) as well as very negative ones (dismally and poorly) are taken into account for the calculation of values. In the case of the NPS question, we have the assumption fulfilled by including promoters and detractors.

We treat all four indicators (product accessibility, ease of purchase, satisfaction with purchase, NPS) as equally important, so each of them has the same weight and has been scaled to a value in the range [0, 250], so that the final score has a value in the range [0, 1000].

intermediate value = %excellent - %poor - %fail
intermediate value NPS = NPS / 100
final value = (intermediate value + 1) * 125
final score = Σ final values

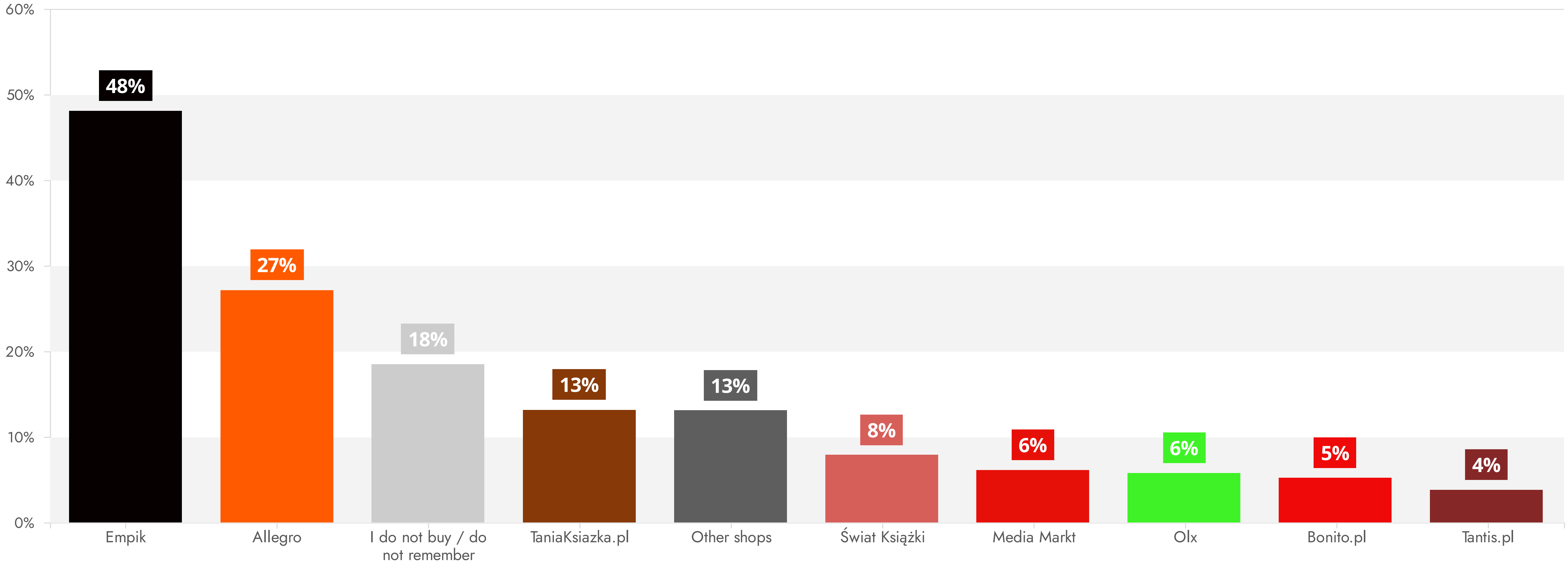
EXAMPLES OF CALCULATIONS FOR COMPANY XYZ

	fatally	poorly	so	good	excellent	intermediate value	final value
Product availability	11%	2%	40%	30%	18%	0,06	**132,5**
Ease of purchase	5%	9%	15%	49%	22%	0,08	**135**
Satisfaction with purchase	1%	3%	28%	31%	37%	0,33	**166,25**
NPS = 40						0,4	**175**
Final result							**608,75**

WHERE HAVE YOU RECENTLY BOUGHT MOVIES, BOOKS, MUSIC OR OTHER MULTIMEDIA?

Multiple choice question

n = 9179

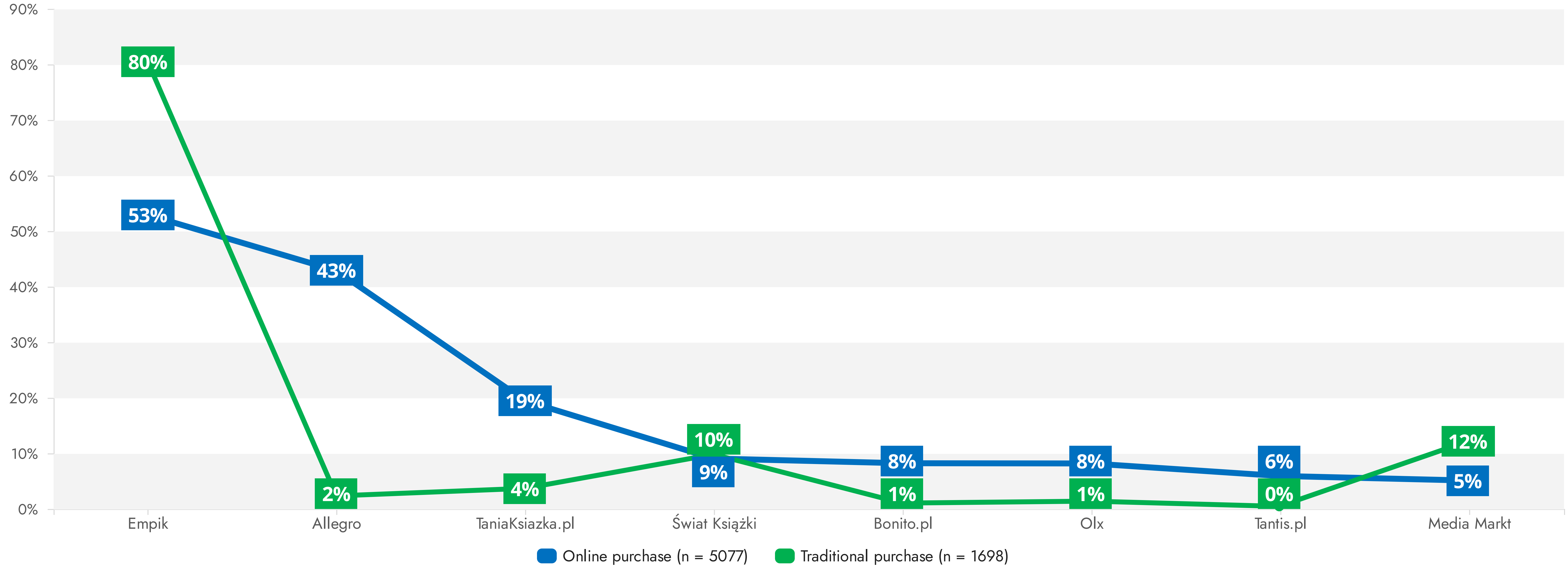


Empik has the largest stationary sales network, which is probably also why it is the undisputed market leader - as many as 48% of respondents recently shopped there. In second place is Allegro, indicated by 27% of respondents. In third place are respondents who have not recently purchased products in this category - 18%. The results are aggregated for all shopping channels (online and traditional shopping combined).

WHERE HAVE YOU RECENTLY BOUGHT MOVIES, BOOKS, MUSIC OR OTHER MULTIMEDIA?

Market shares by purchase channel

n = 5077 online purchase, 1698 stationary purchase

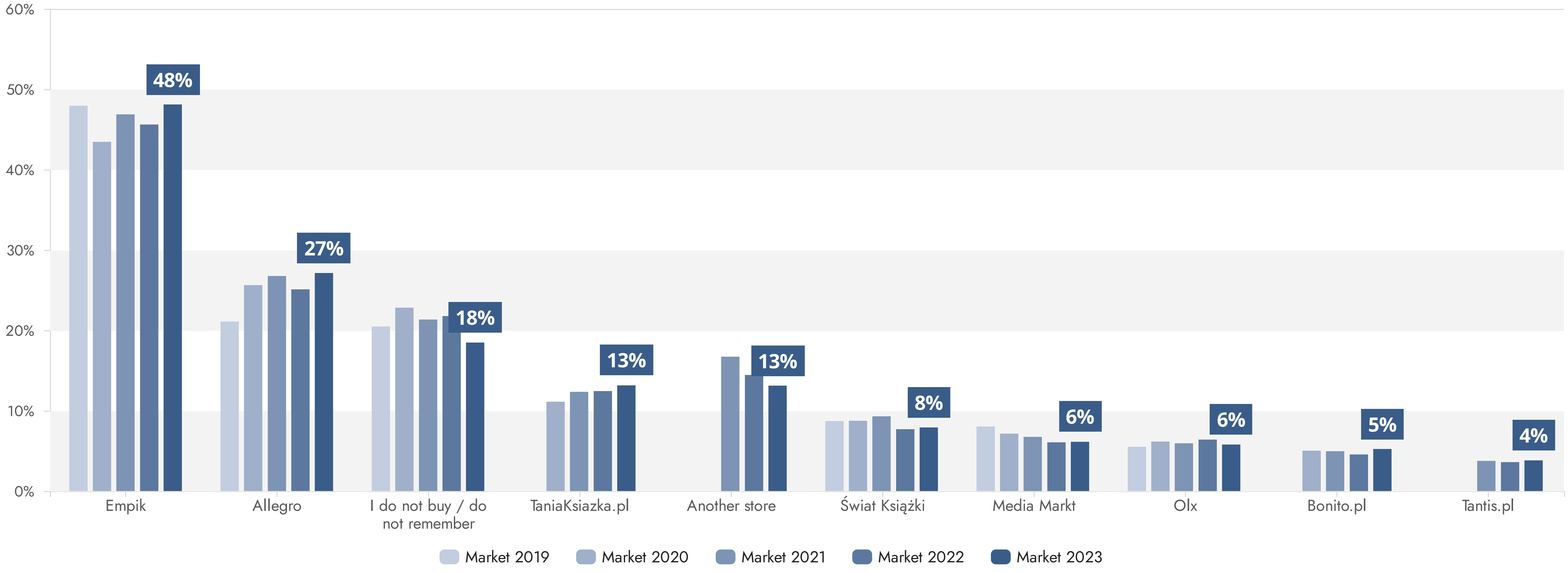


An overwhelming minority of respondents buy products in this category in stationary stores, and of these, as many as 80% do so at Empik chain stores. In the online channel, Empik is the sales leader, followed by Allegro and Tania Książka.

WHERE HAVE YOU RECENTLY BOUGHT MOVIES, BOOKS, MUSIC OR OTHER MULTIMEDIA?

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

n 2019 = 6079, 2020 = 6643, 2021 = 8336, 2022 = 10334, 2023 = 9179

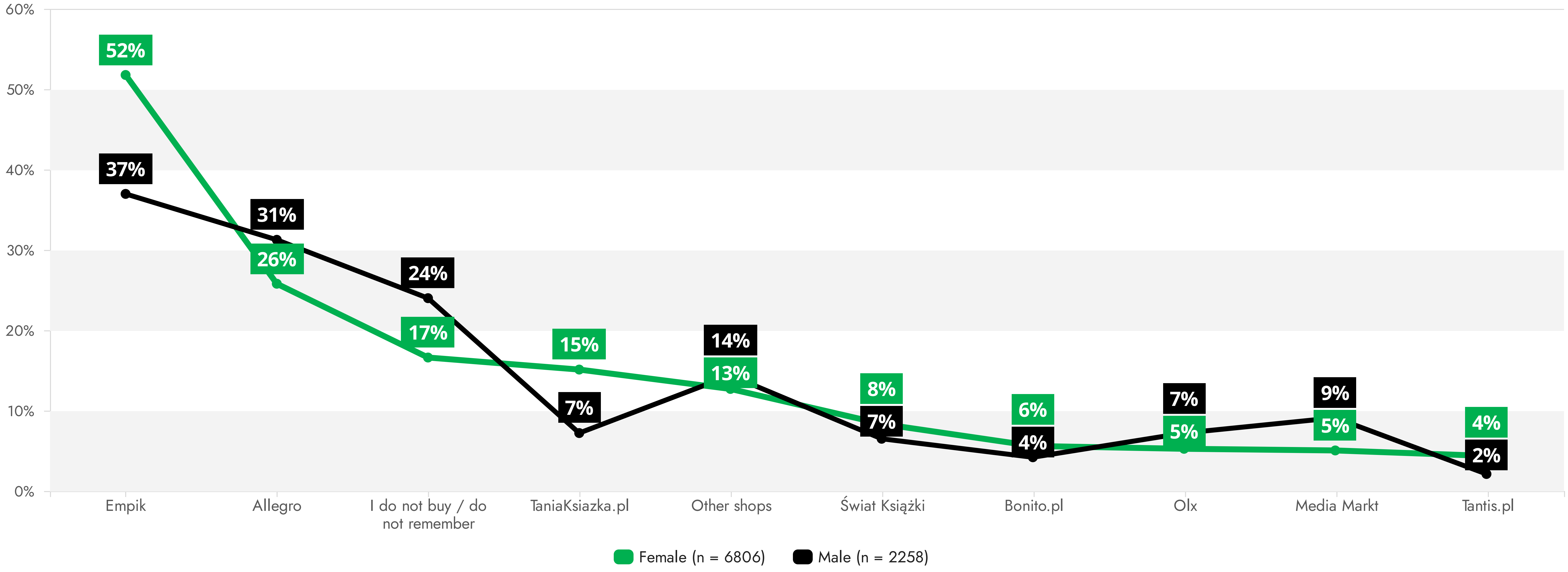


Comparing the Omnichannel 2023 results with last year's survey, we see a decrease in the share of people who do not buy books or multimedia, and an increase in the share among respondents who shop at Empik as well as Allegro.

WHERE HAVE YOU RECENTLY BOUGHT MOVIES, BOOKS, MUSIC OR OTHER MULTIMEDIA?

Analysis by gender

n = 9064



Women are more likely to buy these types of products than men, but, regardless of gender, we tend to head to Empik chain stores for purchases. Men are more likely than women not to buy or remember buying multimedia.

WHERE HAVE YOU RECENTLY BOUGHT MOVIES, BOOKS, MUSIC OR OTHER MULTIMEDIA?

Analysis by gender in 2023 with changes relative to 2022

n 2022 = 10070, 2023 = 9064

	Empik	Allegro	I do not buy / do not remember	TaniaKsiazka.pl	Other shops	Świat Książki	Bonito.pl	Olx	Media Markt	Tantis.pl	Result count
Female	51.8% +1.1pp	25.8% +2.2pp	16.6% -2.5pp	15.1% +0.2pp	12.7% -0.5pp	8.4% +0.2pp	5.6% +0.7pp	5.3% -0.7pp	5.1% -0.1pp	4.4% +0.2pp	6806
Male	37% +1.6pp	31.3% +1.3pp	24% -3.4pp	7.2% +0.8pp	14.4% -2.8pp	6.5%	4.2% +0.7pp	7.2% -0.2pp	9.1% +0.8pp	2.1%	2258

WHERE HAVE YOU RECENTLY BOUGHT MOVIES, BOOKS, MUSIC OR OTHER MULTIMEDIA?

Analysis by province in 2023 with changes relative to 2022

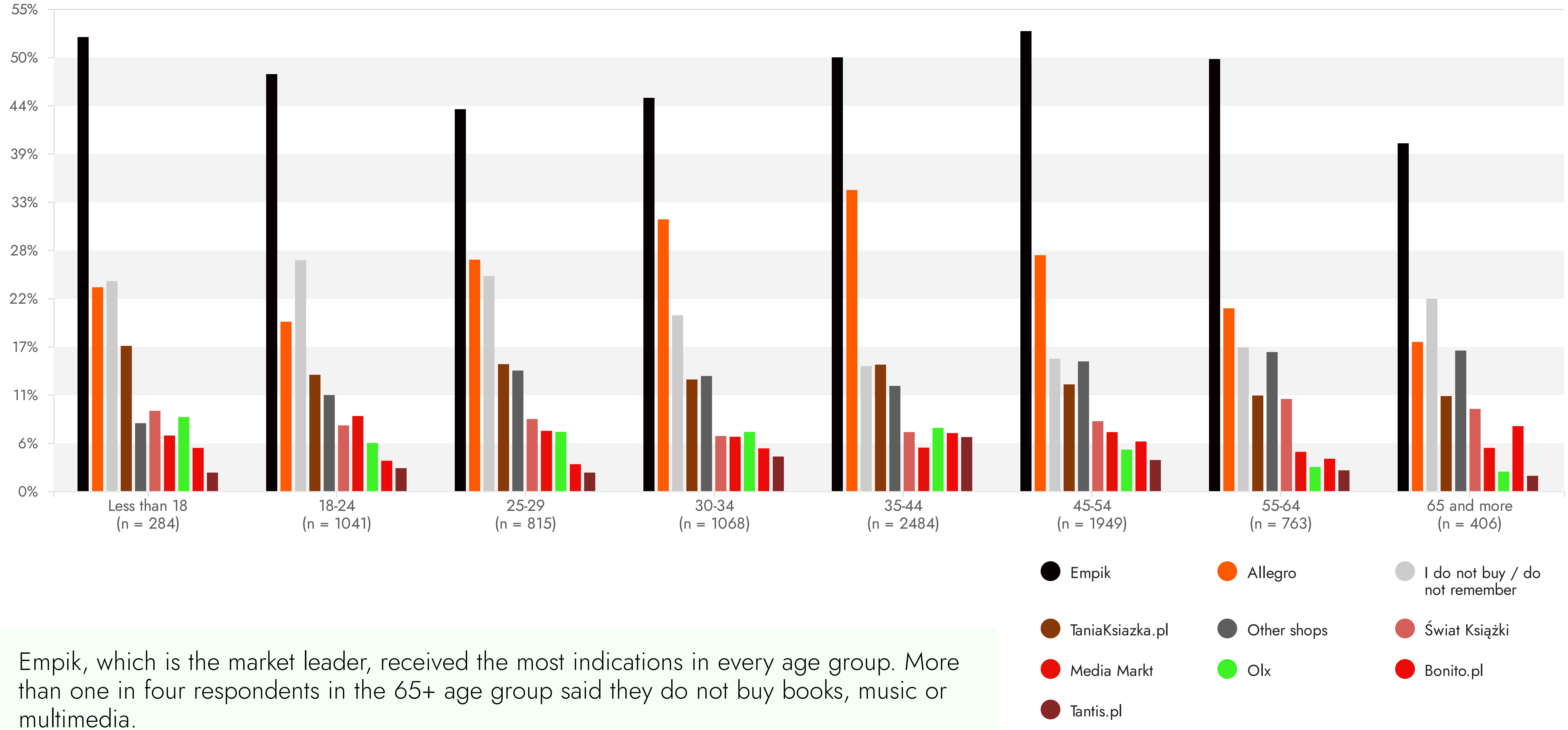
n 2022 = 7791, 2023 = 6917

	Empik	Allegro	I do not buy / do not remember	Other shops	TaniaKsiazka.pl	Świat Książki	Bonito.pl	Media Markt	Olx	Tantis.pl	Result count
województwo mazowieckie	50.5% +1.5pp	25.6% -1.1pp	18.1% -0.9pp	14.9% -3.1pp	12.7% -1.9pp	9.2% -0.5pp	8.4% +1.7pp	5.4% -0.7pp	5.4% -0.6pp	4.5% +0.5pp	1506
województwo śląskie	48.6% +0.9pp	30.3% +5.6pp	19.5% -3.7pp	11.8% -1.9pp	13.4% +2.9pp	7.8% +0.2pp	4.2% +1.1pp	6.8% +1.8pp	5.7% -0.2pp	4.2% +1.6pp	961
województwo wielkopolskie	47.1% -1.2pp	28.2% +2.2pp	19.3% -1.7pp	11.9% -1.2pp	15% +2.8pp	7.4% +0.4pp	2.3% +0.2pp	4.7% -0.8pp	6.4% -0.6pp	4.2% +0.3pp	864
województwo małopolskie	50.1% +5.2pp	23.6% -2.4pp	17.8% -1pp	12.5% -0.7pp	11.7% +0.5pp	7.6% +1.4pp	16.8% +1.4pp	6% -0.2pp	5.7% -0.9pp	3.1% +0.2pp	686
województwo dolnośląskie	52.9% +4.7pp	29% +3.6pp	17.3% -2.9pp	14% +1.3pp	14% -0.3pp	8.7%	5.3% -0.6pp	5% -2pp	5.2% -2.2pp	2.7% -0.4pp	658
województwo pomorskie	50.7% -0.7pp	27.5% +1.2pp	20.2% -0.1pp	11.8% -1.6pp	11.6% -1.3pp	7.5% +0.7pp	3.1% +1.1pp	6.5% +0.2pp	5.3% -1.2pp	2.9% -0.9pp	550
województwo łódzkie	45.8% +1.8pp	28.1% +3.3pp	18.9% -5.3pp	12.2% -1.7pp	11.4% -1.8pp	7.1% -1.5pp	2.9% +0.1pp	6.1% -0.7pp	4.3% -2.7pp	3.7% +1.4pp	509
województwo zachodniopomorskie	46.5% -2.1pp	24.4% -0.1pp	17.2% -0.8pp	13.7% +0.1pp	15.3% +0.2pp	7% -1.5pp	3% +1.4pp	8.1% -1.3pp	5.8% +0.2pp	4.7% +1.4pp	430
województwo kujawsko-pomorskie	47.8% +5.2pp	26.8% +0.6pp	17.1% -9.5pp	13.1% -0.3pp	12.6% +2.2pp	11.5% +3.6pp	2.4% +0.1pp	7.1% +2.2pp	6.8% +1.7pp	6% +2pp	381
województwo lubelskie	45.2% -1.9pp	28% +0.2pp	18.5% -2.9pp	14% +3.7pp	12.4%	7.8% +0.7pp	3.5% +0.1pp	7.3% +2.5pp	5.9% -0.4pp	3% -1.2pp	372

WHERE HAVE YOU RECENTLY BOUGHT MOVIES, BOOKS, MUSIC OR OTHER MULTIMEDIA?

Analysis by age

n = 8810

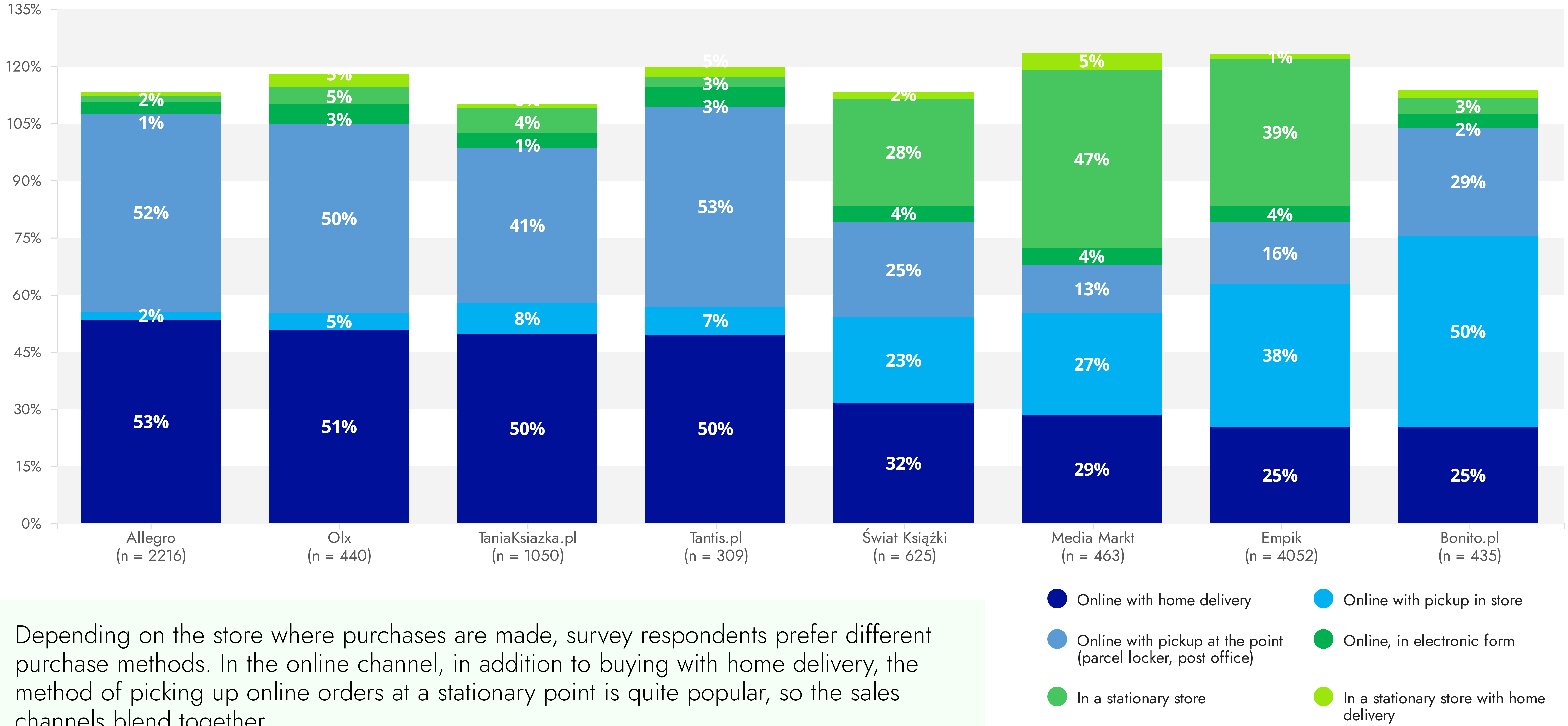


Empik, which is the market leader, received the most indications in every age group. More than one in four respondents in the 65+ age group said they do not buy books, music or multimedia.

HOW DID YOU BUY THE PRODUCTS THERE?

Purchasing channel of choice - one-choice question

n = 6154



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 stationary point is quite popular, so the sales channels blend together.

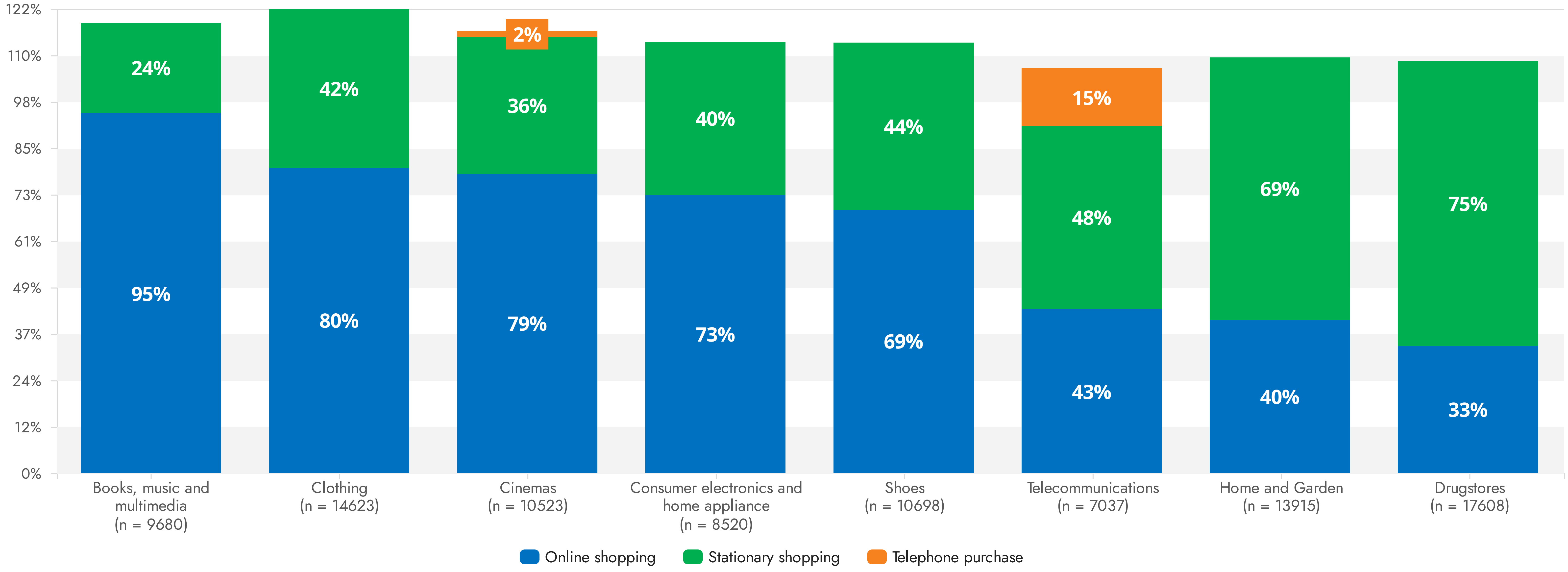
HOW DID YOU BUY THE PRODUCTS THERE?

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)	Online, in electronic form	In a stationary store	In a stationary store with home delivery	Result count
Empik	25.3% +7.4pp	37.6% +5.6pp	16.1%	4.3% +1.5pp	38.6% +3.9pp	1.2% +0.2pp	4052
Allegro	53.3% +6.1pp	2.1% +1.1pp	51.9%	3.2% +1.4pp	1.5% +0.5pp	1.1% +0.3pp	2216
TaniaKsiazka.pl	49.6% +4.6pp	8.1% +0.8pp	40.8%	4% +1.2pp	6.4% +1.3pp	1% +0.3pp	1050
Świat Książki	31.5% +5.3pp	22.6% +1pp	25%	4.3% -0.3pp	28.2% +1.5pp	1.8% +0.5pp	625
Media Markt	28.5% +6.3pp	26.6% +10.1pp	12.7%	4.3% +3pp	46.9% -0.2pp	4.5% +0.5pp	463
Bonito.pl	25.3% -0.6pp	50.1% +1.7pp	28.5%	3.4% +2pp	4.4% +1.5pp	1.8% +0.6pp	435
Tantis.pl	49.5% +0.6pp	7.1% +5.2pp	52.8%	5.2% +3pp	2.6% +2pp	2.6% +1pp	309

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

Comparison of channels chosen between industries

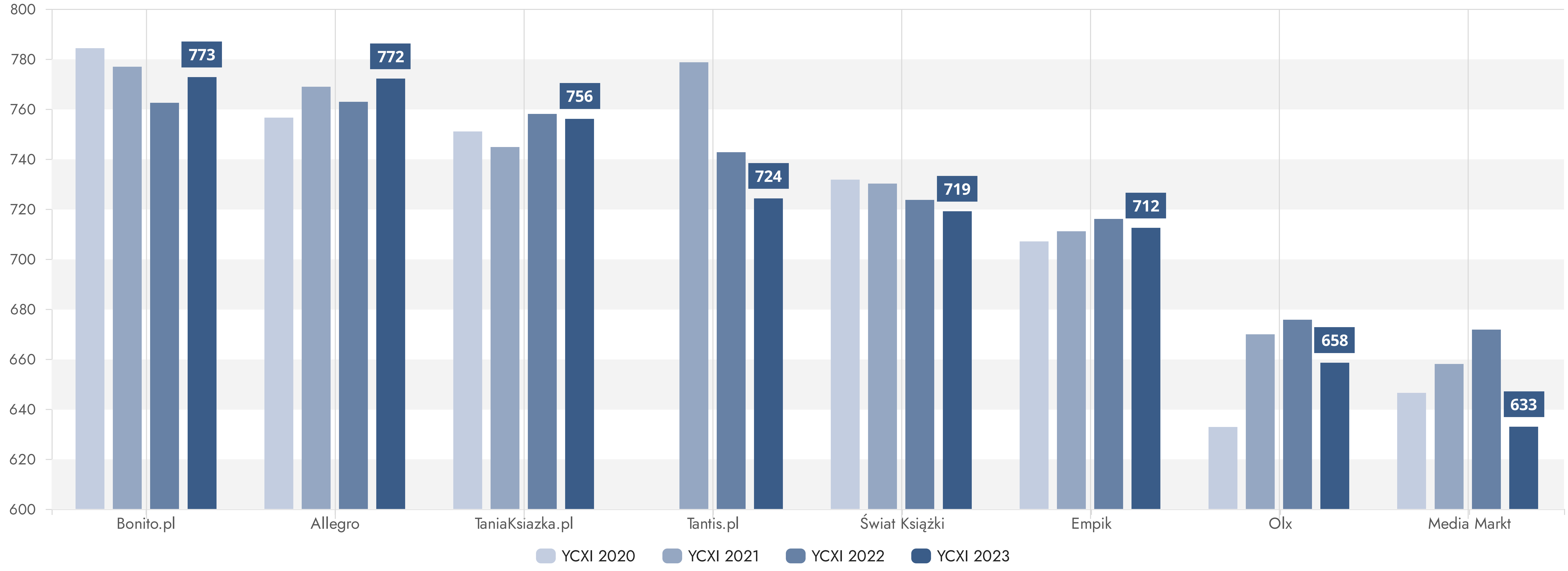


Comparing the methods of purchasing books and multimedia with the industries surveyed in Omnichannel 2023 shows the highest share of online sales of all the industries surveyed, but nevertheless there is also a significant presence in the world of stationary stores.

EXPERIENCE QUALITY INDICATORS

YOUR CUSTOMER EXPERIENCE INDEX

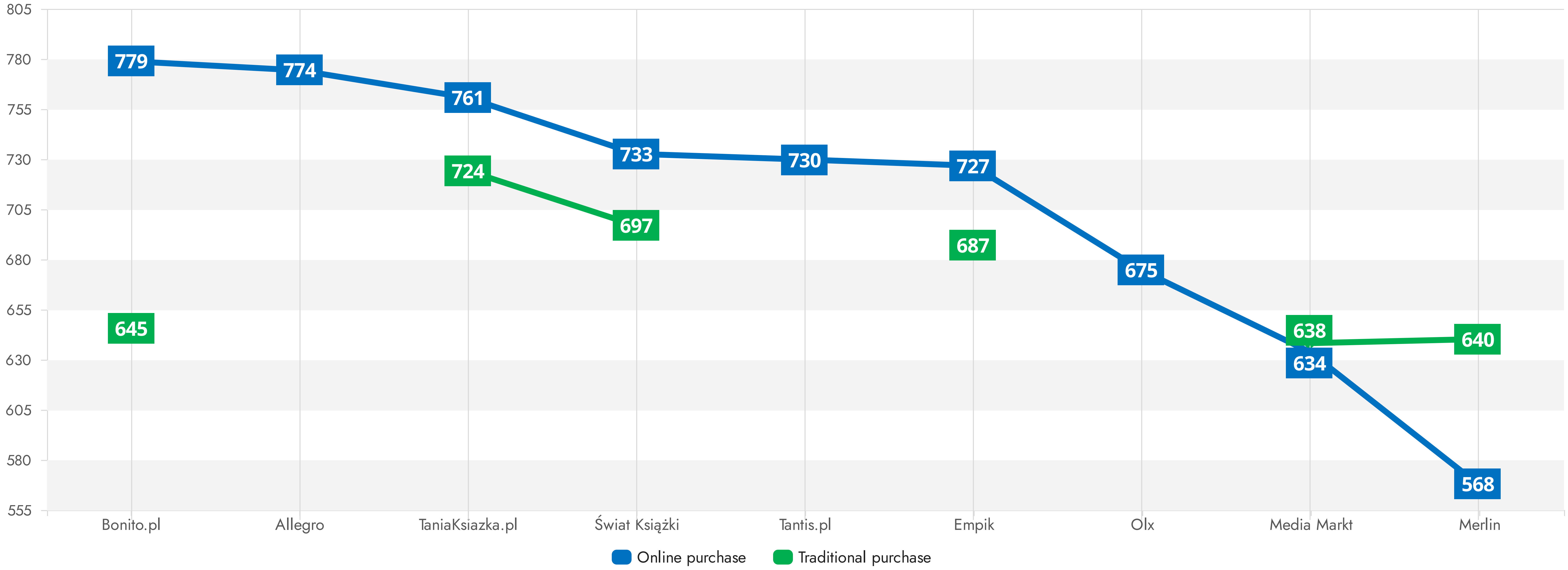
Quality index on a scale of 0 to 1000 taking into account four satisfaction factors:
availability and selection of products, ease of ordering, satisfaction with purchase, willingness to recommend the store to friends



The Your Customer Experience Quality Index is designed to more easily differentiate between companies performing similarly on sub-questions as well as to identify real quality leaders on a scale of 0 to 1000. As you can see, it's pretty good, since companies scored in the neighborhood of three-quarters of the possible points, however, you can't rest on your laurels. The industry leaders are Bonito.pl, just a point less was achieved by Allegro, with Tania Książka in third place.

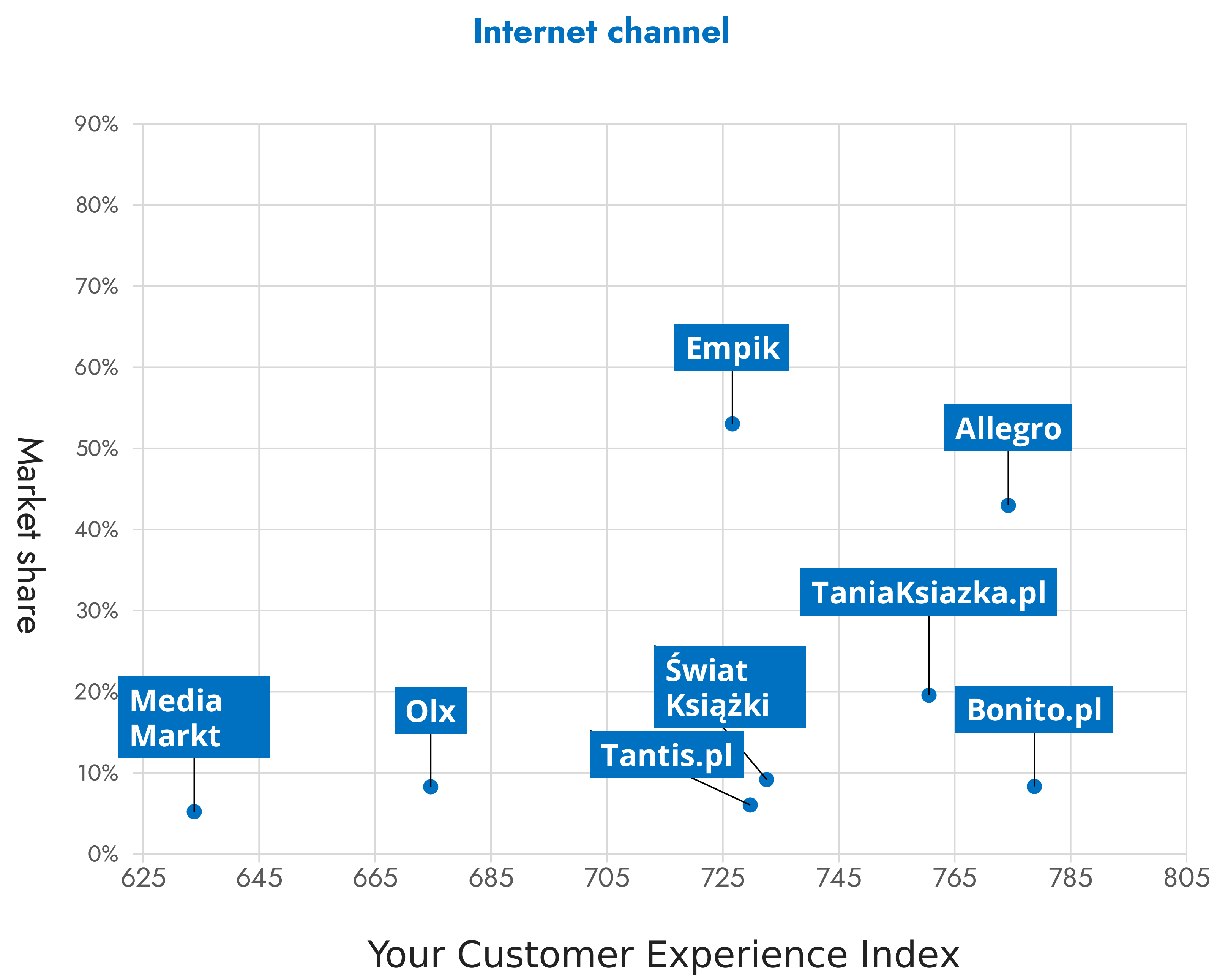
YOUR CUSTOMER EXPERIENCE INDEX

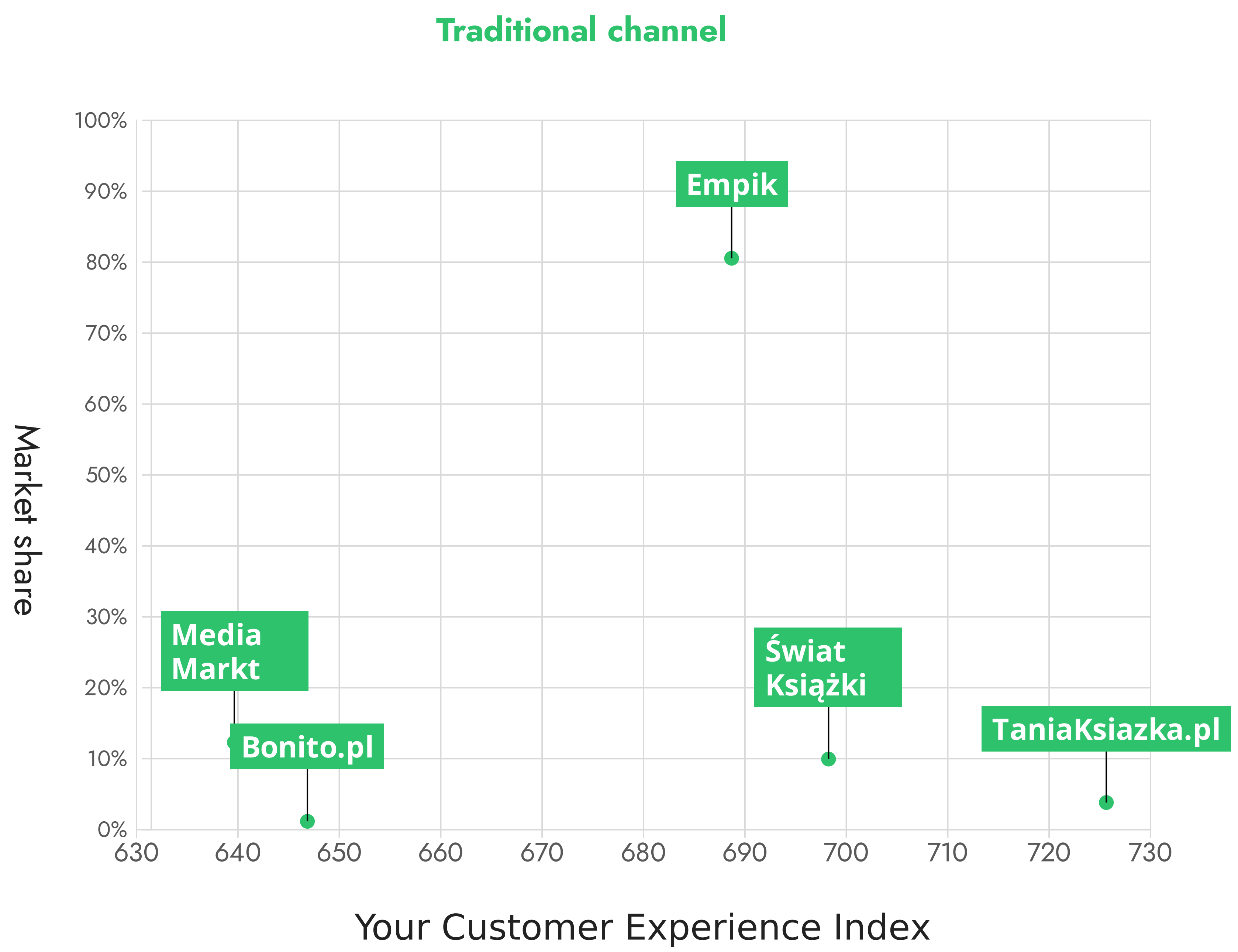
Quality index on a scale of 0 to 1000, broken down by purchasing channel



It is noteworthy that respondents rate the online shopping experience more positively than those from traditional sales. Allegro boasts the highest quality rating in the online channel and Bonito.pl in the stationary channel.

YOUR CUSTOMER EXPERIENCE INDEX



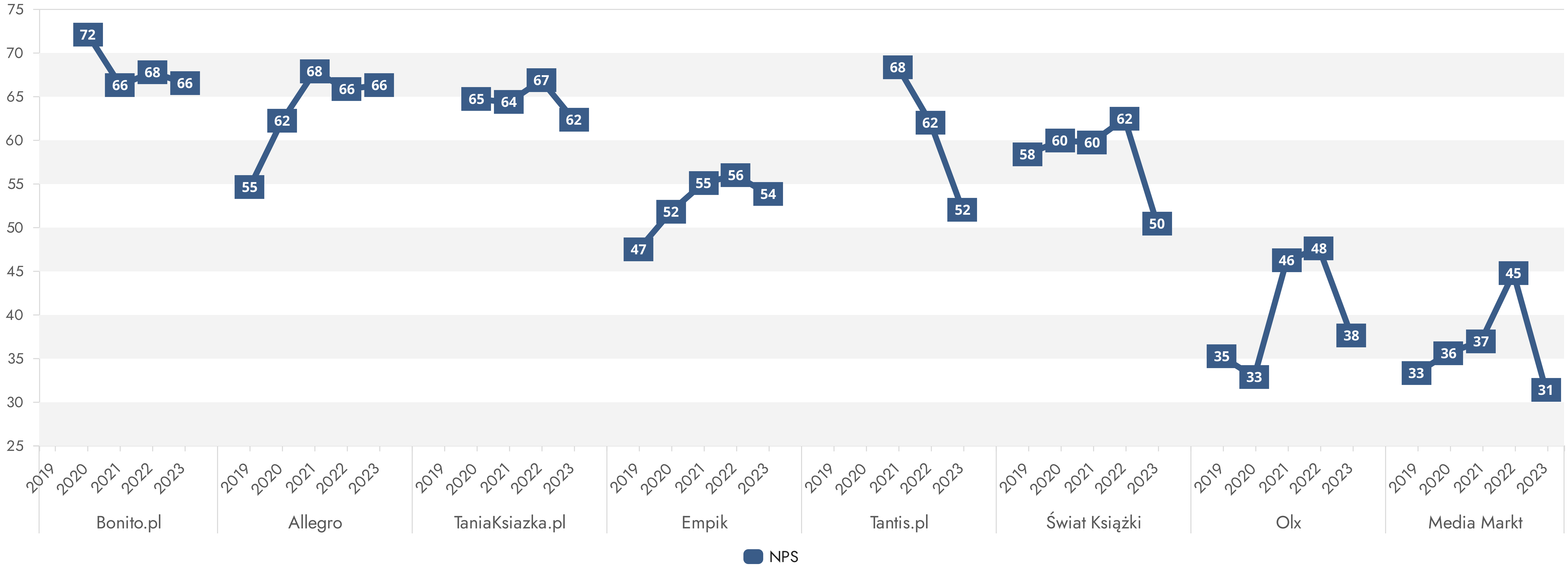


The charts show market shares by sales channel and the value of the Your Customer Experience Index. The online channel is dominated by Empik with the largest market share and Bonito.pl having the highest index value. In the stationary channel, Empik also has the largest share, but it is far from the leader, TaniaKsiążka.pl in the area of experience.

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

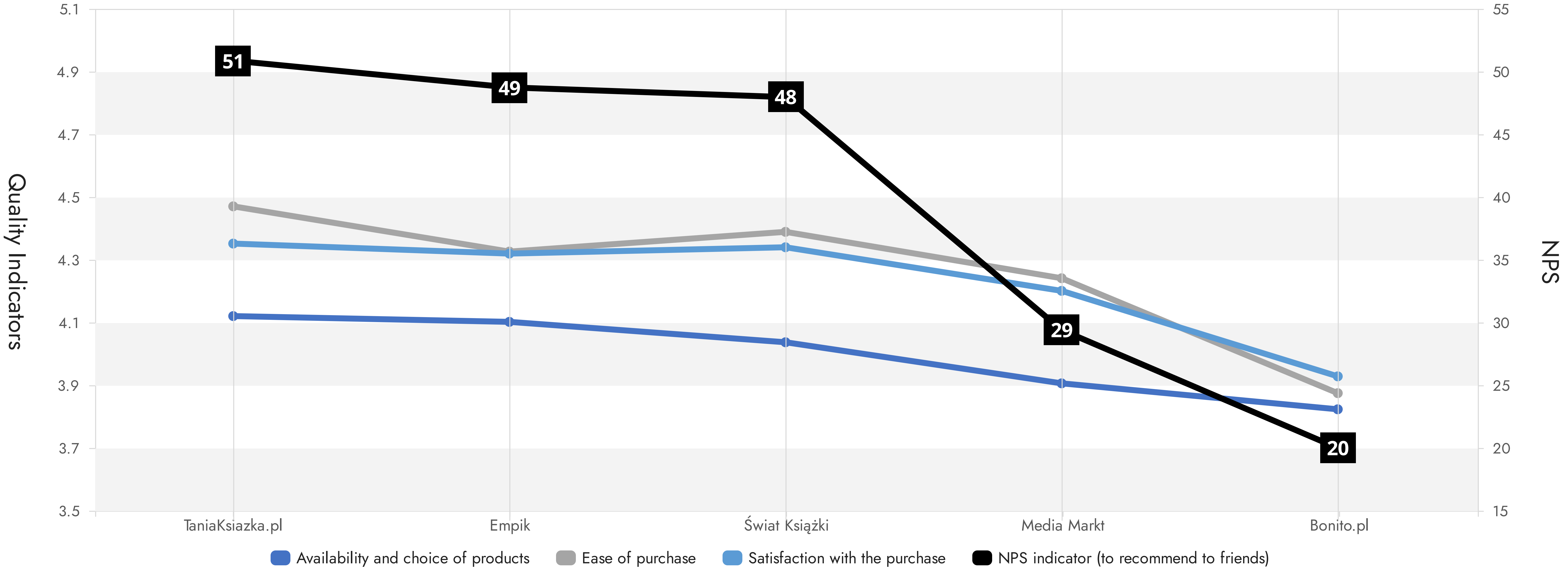
Comparison of NPS index values against previous editions of the survey

n 2019 = 3424, 2020 = 4014, 2021 = 5066, 2022 = 5995, 2023 = 5577



TRADITIONAL CHANNEL - EXPERIENCE QUALITY RATINGS

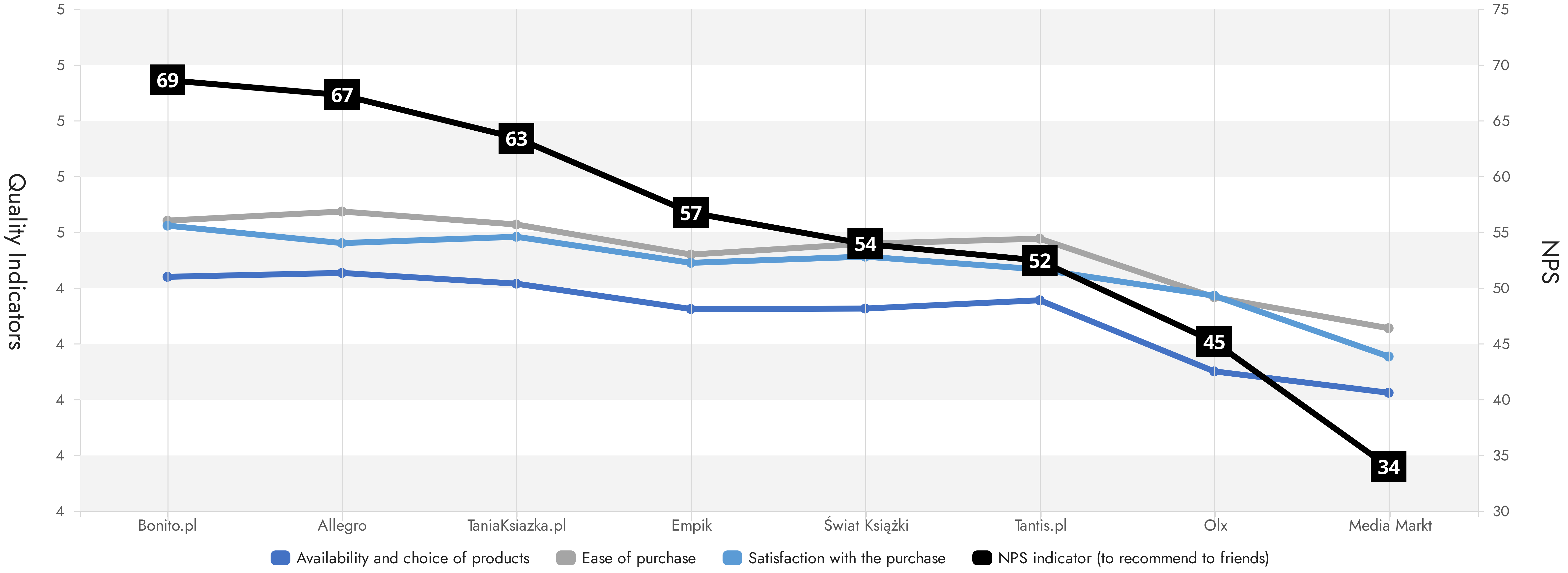
Quality ratings on a scale of 1 to 5 and NPS index on a scale of -100 to 100



The highest NPS in the traditional channel is recorded for Taniej Książki, Empik and Świat Książki - the NPS values are very similar among the leaders.

ONLINE CHANNEL - EXPERIENCE QUALITY RATINGS

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



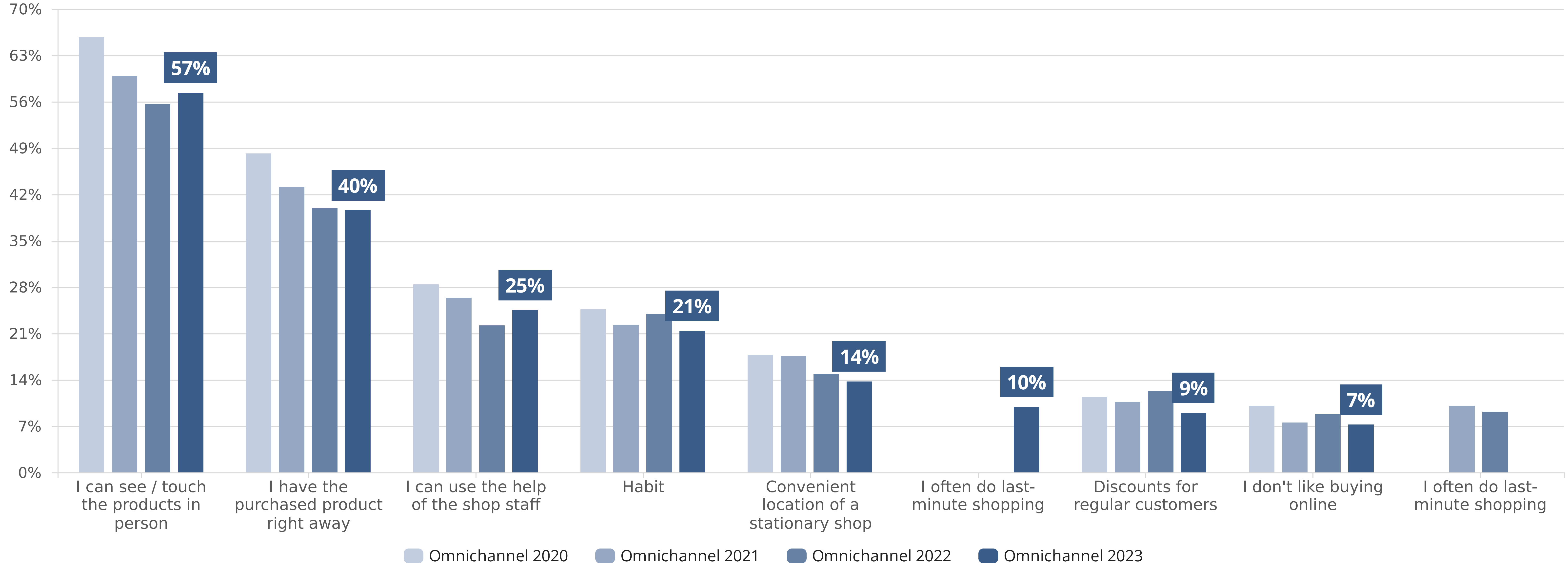
Analyzing individual aspects of the experience against the NPS indicator, we observe the strength of the Bonito.pl, Allegro and TaniaKsiazka.pl brands, where a high rating for ease of purchase is also correlated with a high likelihood of recommending the brand to friends.

SHOPPING PREFERENCES IN THE STATIONARY CHANNEL

WHY DO YOU PREFER TO BUY MOVIES, BOOKS, MUSIC OR OTHER MULTIMEDIA IN A STATIONARY STORE?

Traditional channel - Multiple choice question

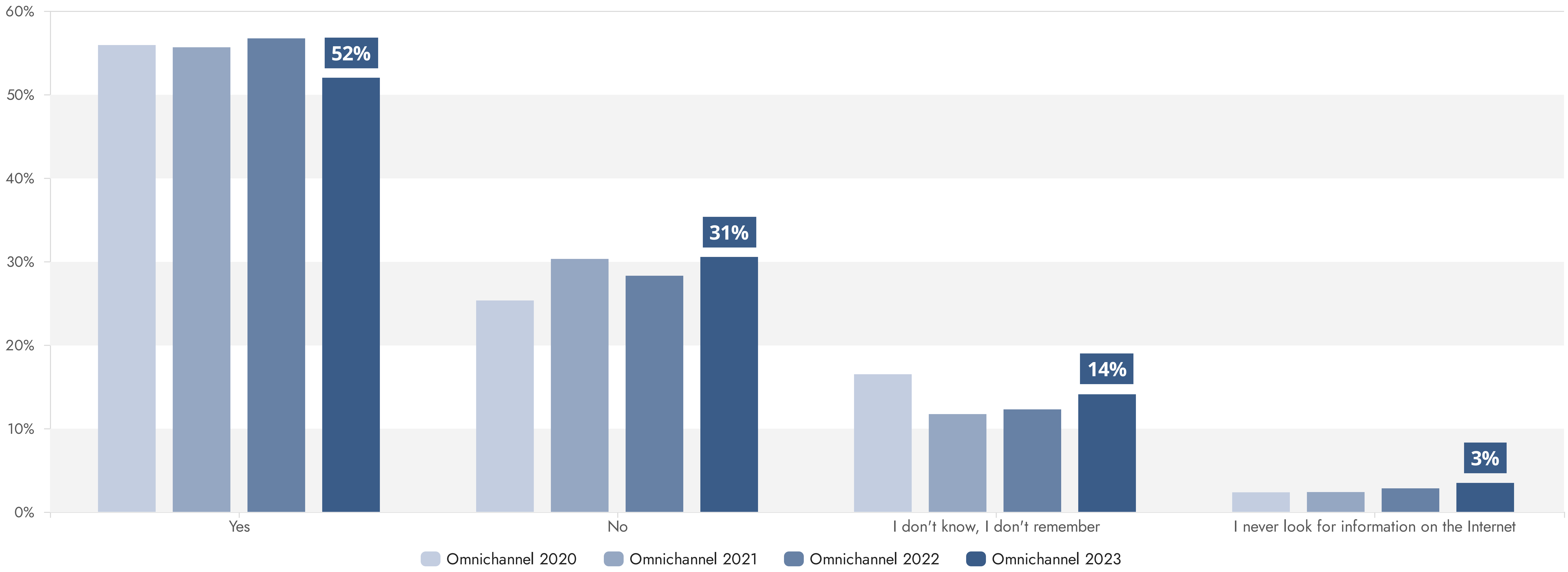
n 2020 = 1036, 2021 = 1354, 2022 = 1538, 2023 = 1151



BEFORE THE LAST PURCHASE OF MOVIES, BOOKS, MUSIC OR OTHER MULTIMEDIA IN A STATIONARY SHOP, DID YOU LOOK FOR INFORMATION ON THE INTERNET?

Traditional channel - Multiple choice question

n 2020 = 814, 2021 = 931, 2022 = 1037, 2023 = 754

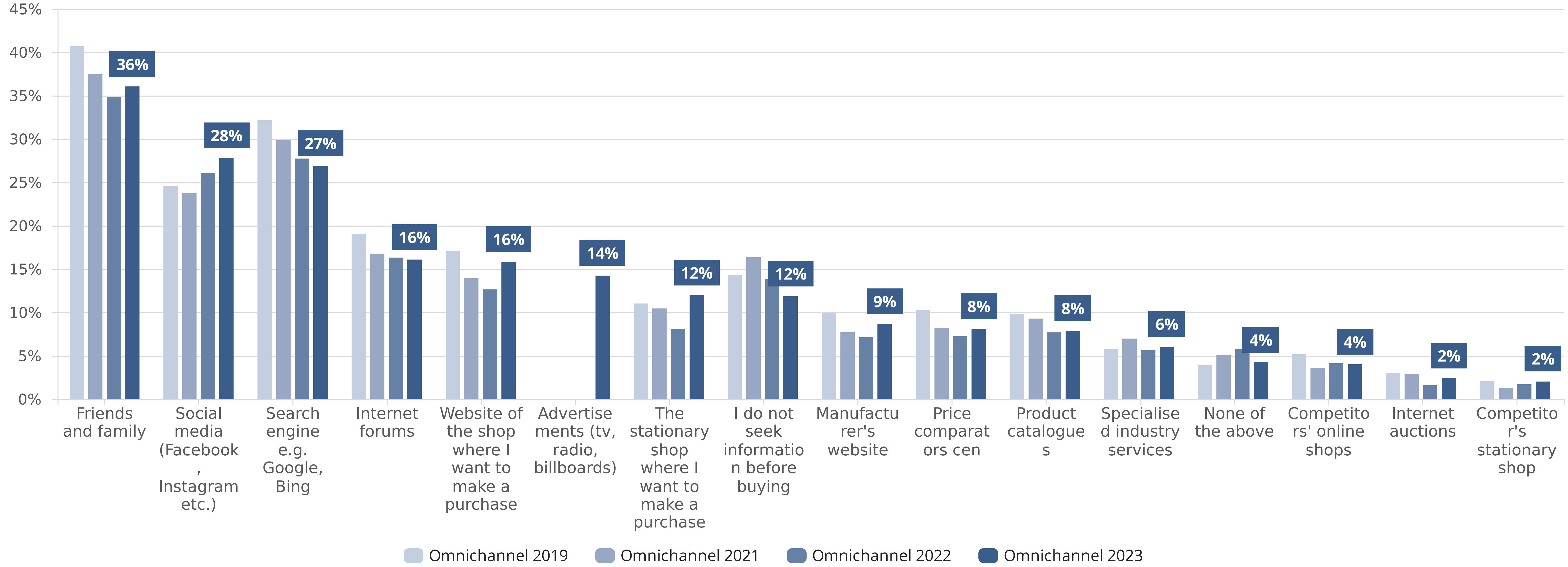


We see a decline in the share of people compared to the 2022 results who look online for product information, reviews or product comparisons before making a purchase.

FROM WHERE DO YOU OBTAIN INFORMATION ABOUT MOVIES, BOOKS, MUSIC OR OTHER MULTIMEDIA BEFORE PURCHASE?

Traditional channel - Multiple choice question

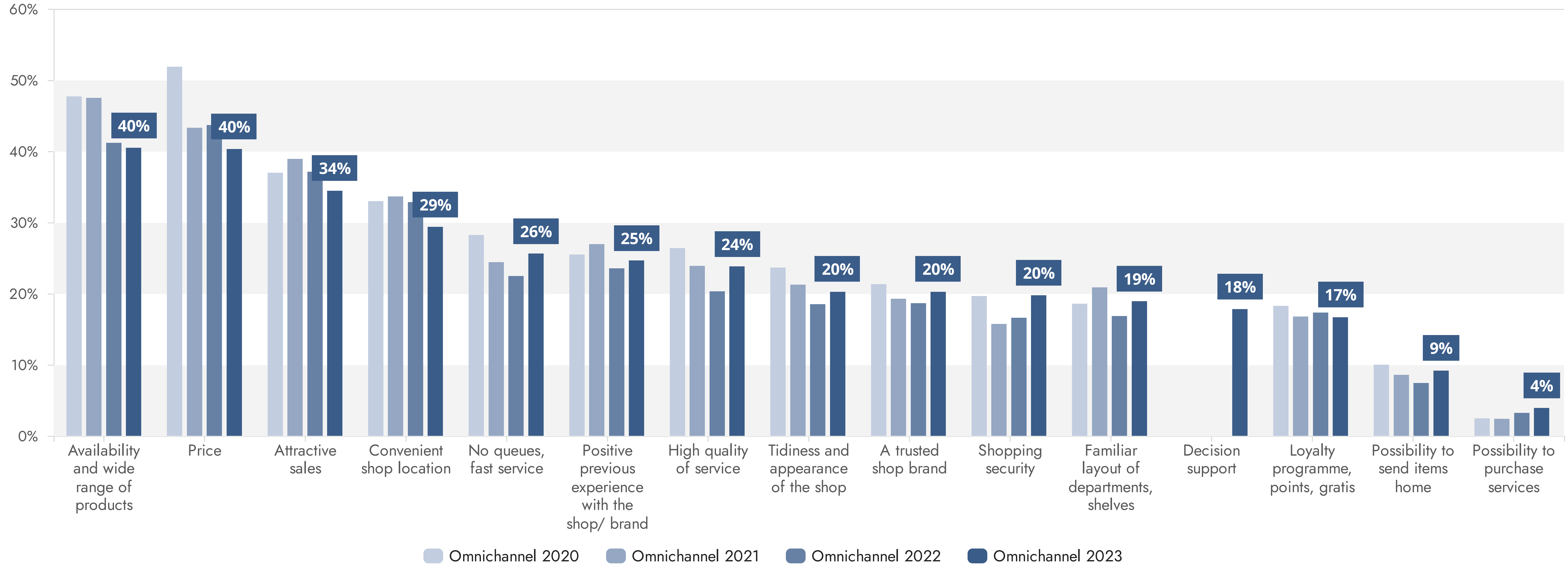
n 2020 = 818, 2021 = 948, 2022 = 1068, 2023 = 1068



WHAT IS MOST IMPORTANT TO YOU WHEN SHOPPING FOR MOVIES, BOOKS, MUSIC OR OTHER MULTIMEDIA IN A STATIONARY STORE?

Traditional channel - Multiple choice question

n 2020 = 652, 2021 = 758, 2022 = 838, 2023 = 613

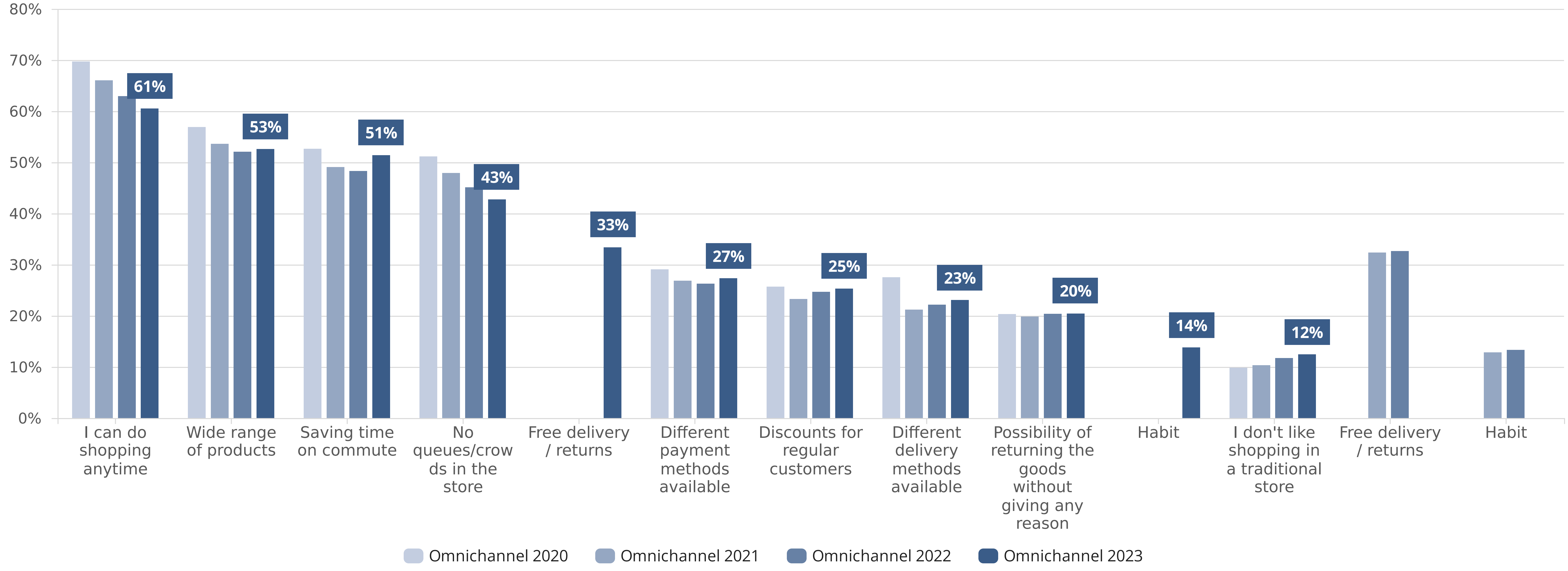


SHOPPING PREFERENCES IN THE ONLINE CHANNEL

WHY DO YOU PREFER TO BUY MOVIES, BOOKS, MUSIC OR OTHER MULTIMEDIA IN AN ONLINE SHOP?

Internet channel - Multiple choice question

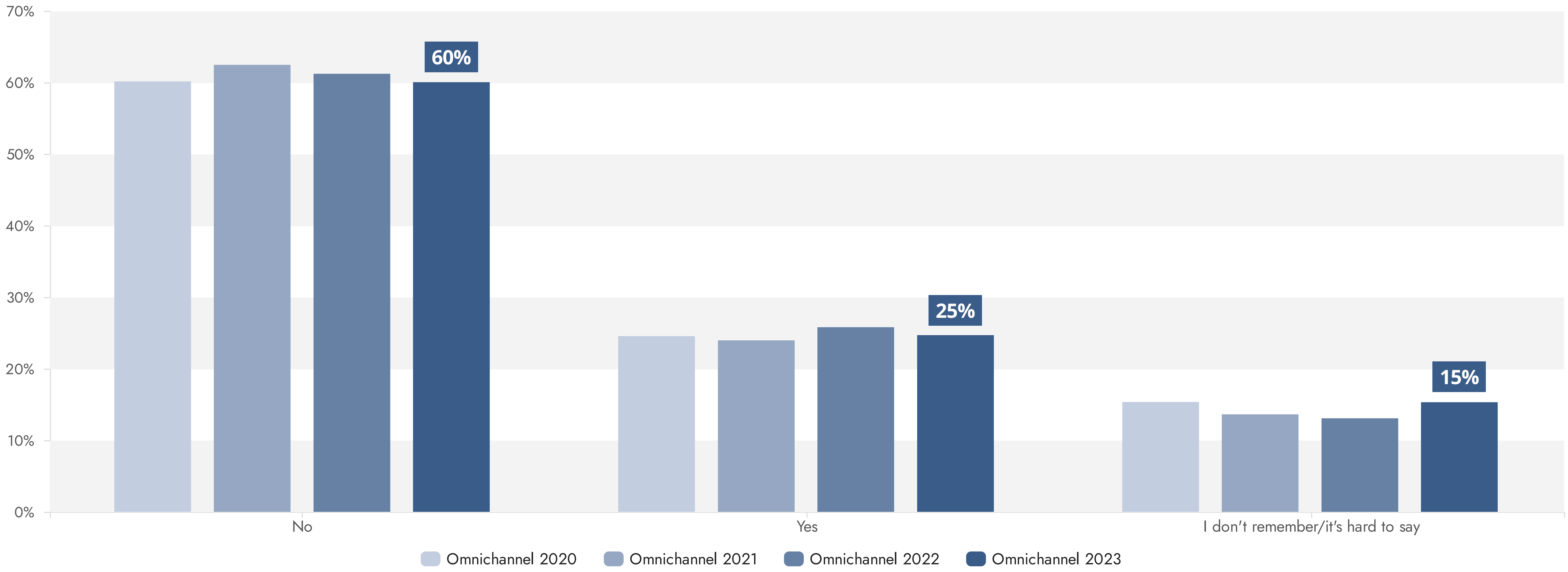
n 2020 = 1789, 2021 = 2539, 2022 = 2969, 2023 = 2323



BEFORE THE LAST PURCHASE OF MOVIES, BOOKS, MUSIC OR OTHER MULTIMEDIA IN AN ONLINE SHOP, DID YOU VISIT THE STATIONARY STORES TO GET ACQUAINTED WITH THE PRODUCT?

Internet channel - Multiple choice question

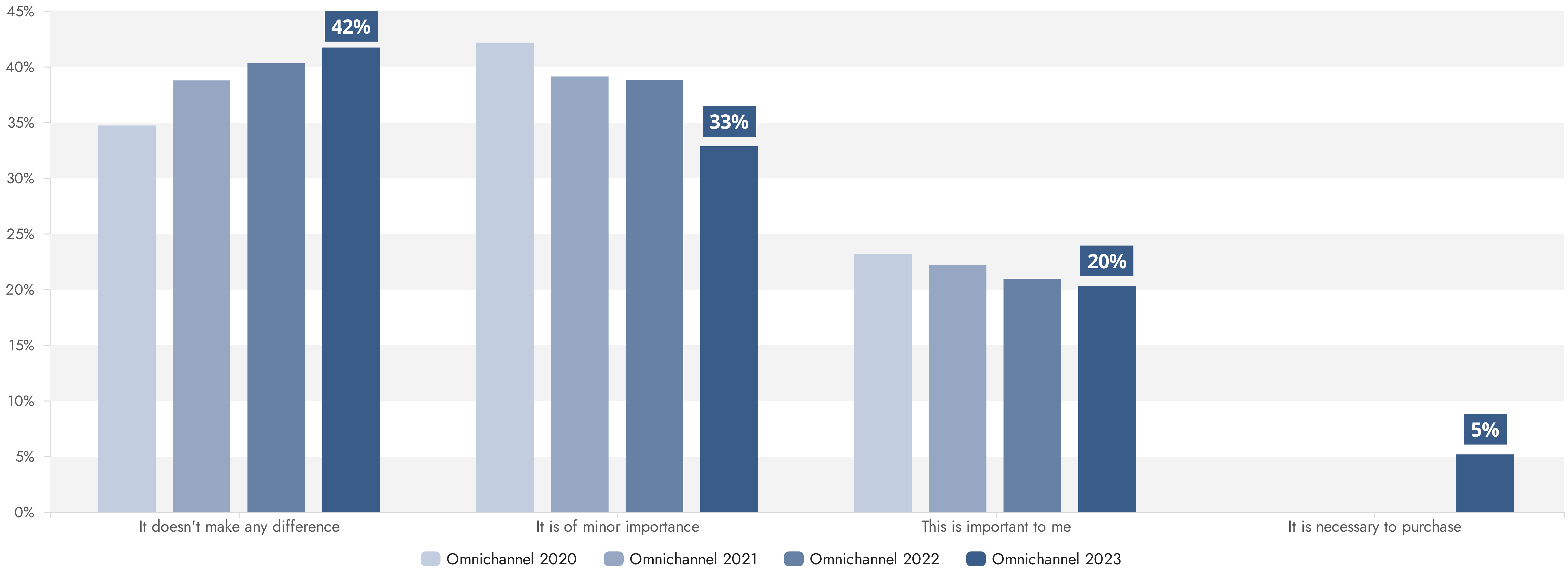
n 2020 = 2380, 2021 = 3142, 2022 = 3643, 2023 = 3001



WHEN PLANNING ONLINE SHOPPING FOR MOVIES, BOOKS, MUSIC OR OTHER MULTIMEDIA, DO YOU TAKE INTO CONSIDERATION THE PRESENCE OF A

Internet channel - Multiple choice question

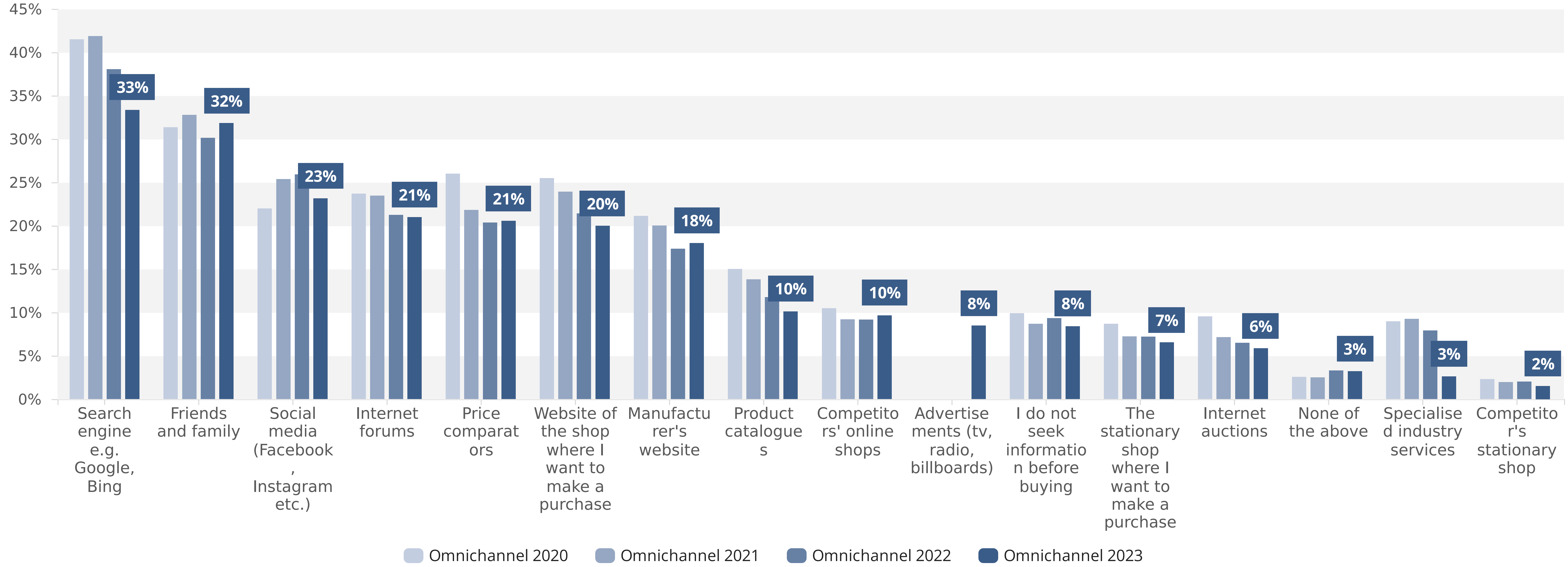
n 2020 = 2271, 2021 = 3067, 2022 = 3508, 2023 = 2851



WHERE DO YOU OBTAIN PRODUCT INFORMATION BEFORE PURCHASE?

Internet channel - Multiple choice question

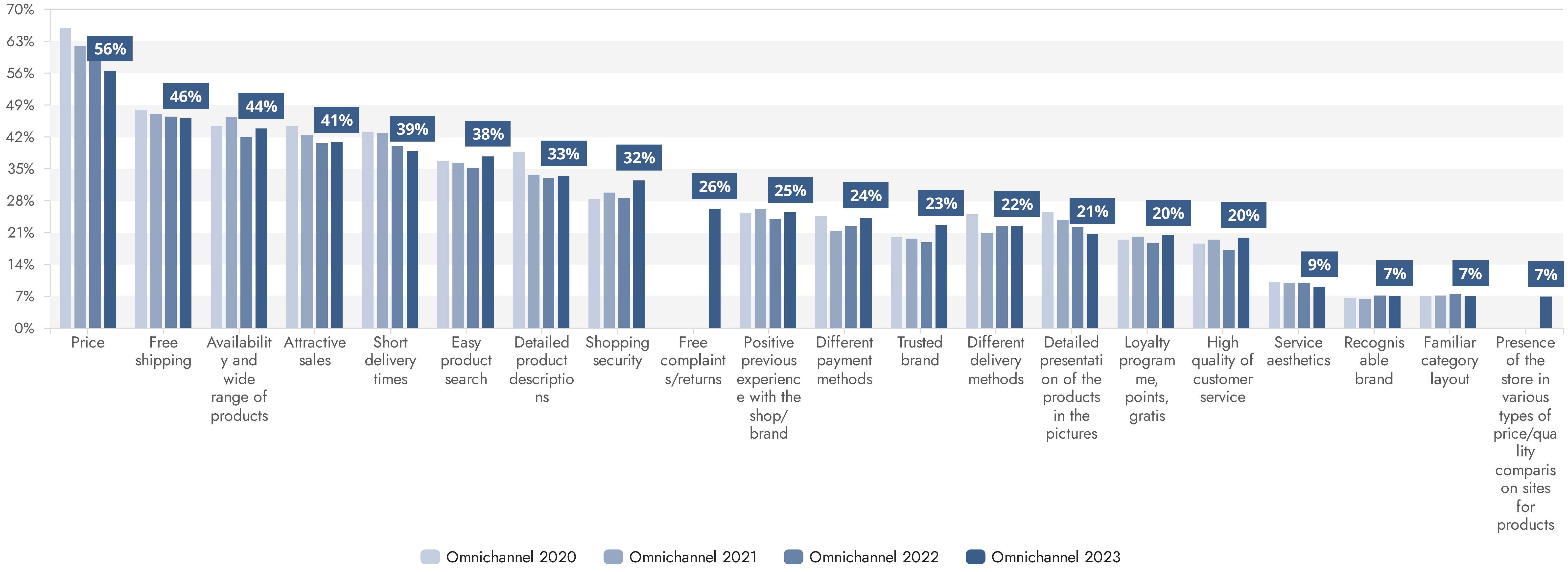
n 2020 = 2352, 2021 = 3138, 2022 = 3678, 2023 = 3047



WHAT IS THE MOST IMPORTANT THING FOR YOU WHEN SHOPPING FOR MOVIES, BOOKS, MUSIC OR OTHER MULTIMEDIA ONLINE?

Internet channel - Multiple choice question

n 2020 = 1885, 2021 = 2569, 2022 = 2906, 2023 = 2320

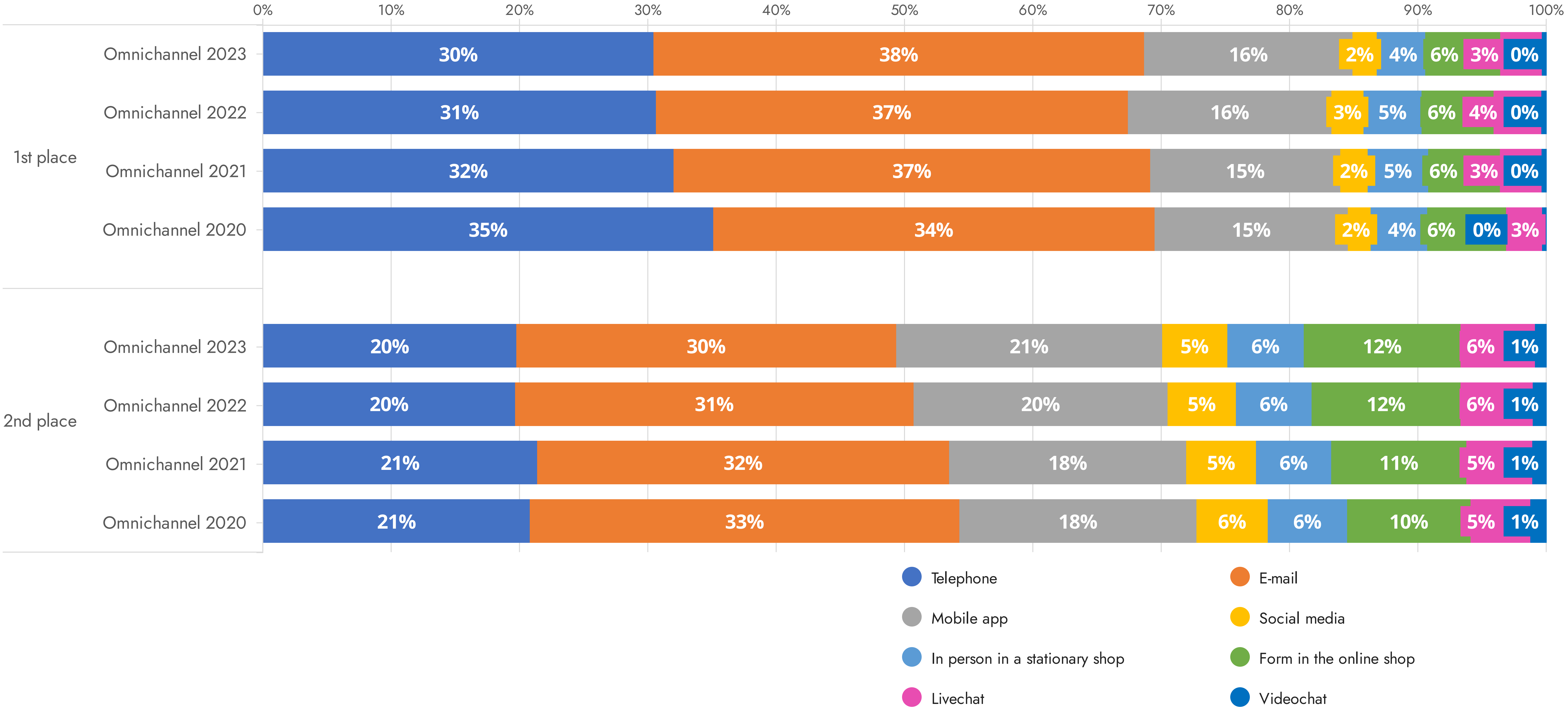


The price of a product ceases to be so important to the customer every year, all the accompanying circumstances, i.e. a wide selection and easy search of products or diverse payment methods, are becoming more important.

IF NECESSARY, HOW WOULD YOU LIKE TO CONTACT THE ONLINE STORE AFTER YOUR PURCHASE?

Internet channel - Ranking question. The distribution of first and second choice contact methods is shown

n 2020 = 1933, 2021 = 2952, 2022 = 2952, 2023 = 2401

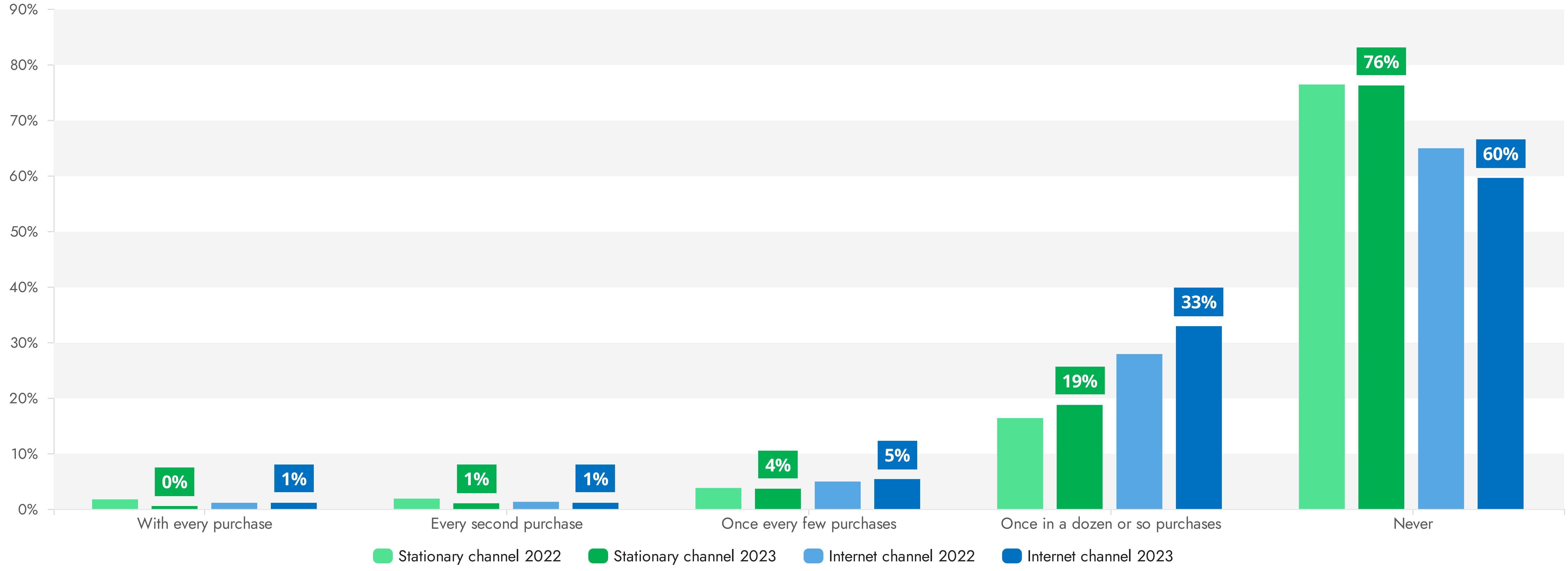


POST-PURCHASE EXPERIENCE

HOW OFTEN DO YOU FIND YOURSELF RETURNING MOVIES, BOOKS, MUSIC OR OTHER MEDIA (COMPLAINT/RETURN/EXCHANGE)?

Single-choice question

n internet channel 2023 = 2168, 2022 = 2728, n fixed channel 2023 = 609, 2022 = 821

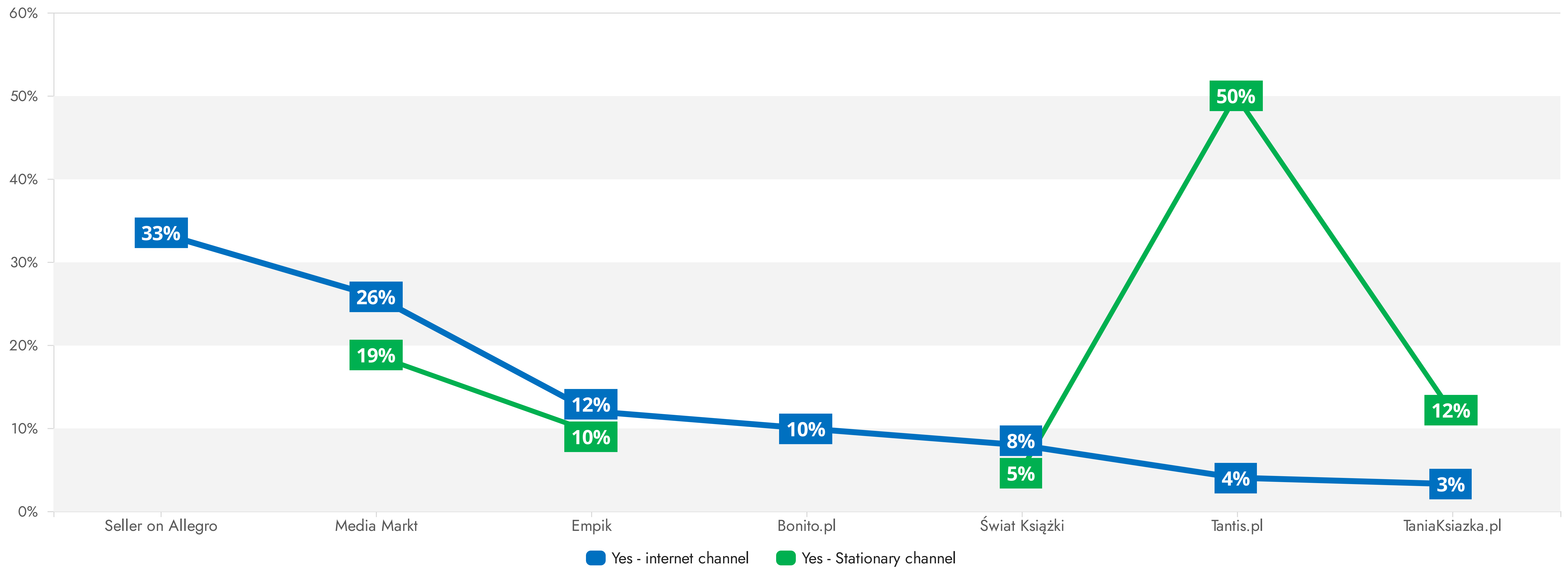


We already know that the ecommerce segment is going from strength to strength, but it should be noted that the share of returns of purchased products in this channel is higher than in traditional sales, which in turn is associated with increased work of after-sales service.

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

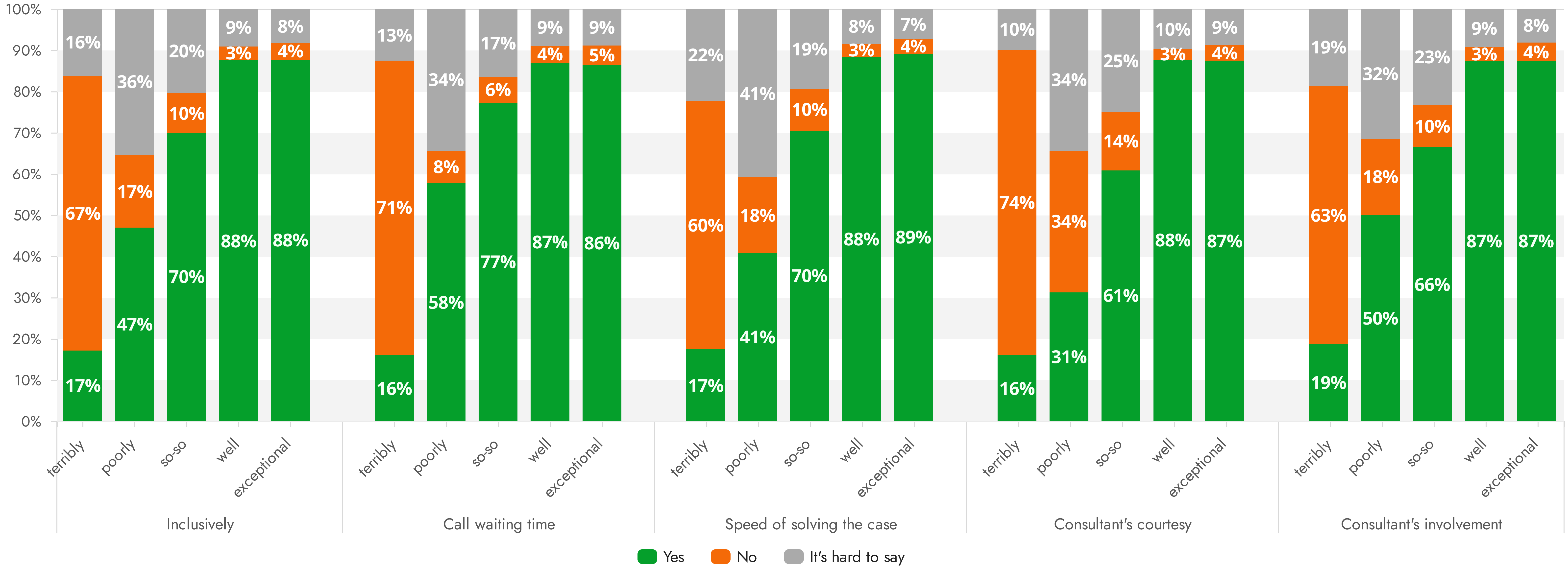
n internet channel = 2233, n fixed channel = 785



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

Single-choice matrix question

n = 1050



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 fateful rating is, in turn, courtesy, call waiting time, consultant engagement and speed of resolution.

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
- The influence of reviews and ratings on purchasing decisions
- Frequencies of returns
- 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

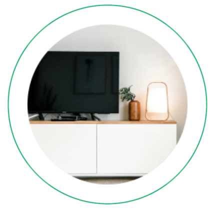

Drugstores


Footwear


Pharmacies


Telecommunicatic


Home and garden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