

# Omnichannel 2018

## Drugstores in Poland

# Introduction

More and more companies recognize the importance of taking care of customer experience. In this day, it is not enough to compete in the field of products or services, because the way the service is delivered begins to be as important as what is being delivered. Regardless of the industry, customers expect increasingly higher level of service and adjustment to their own expectations. They do not want to fit in with companies, they expect companies to match to them.

In many studies carried out for our Partners, we proved how important it is to be satisfied with the services provided, how important is the ease of making purchase and to what extent satisfaction influences business indicators like revenue. In connection with growing expectations, we checked the real needs of Polish Internet users in selected market segments, the assessment of satisfaction factors and their impact on loyalty, and thus sales. We have received answers from about 50,000 Internet users on their experiences and the perception of individual companies in relation to each other.

I hope that the collected results will help us to better understand customers and encourage everyone to further develop Customer Experience programs, which ultimately serve us all.

**Piotr Wojnarowicz**

CEO

**YourCX**

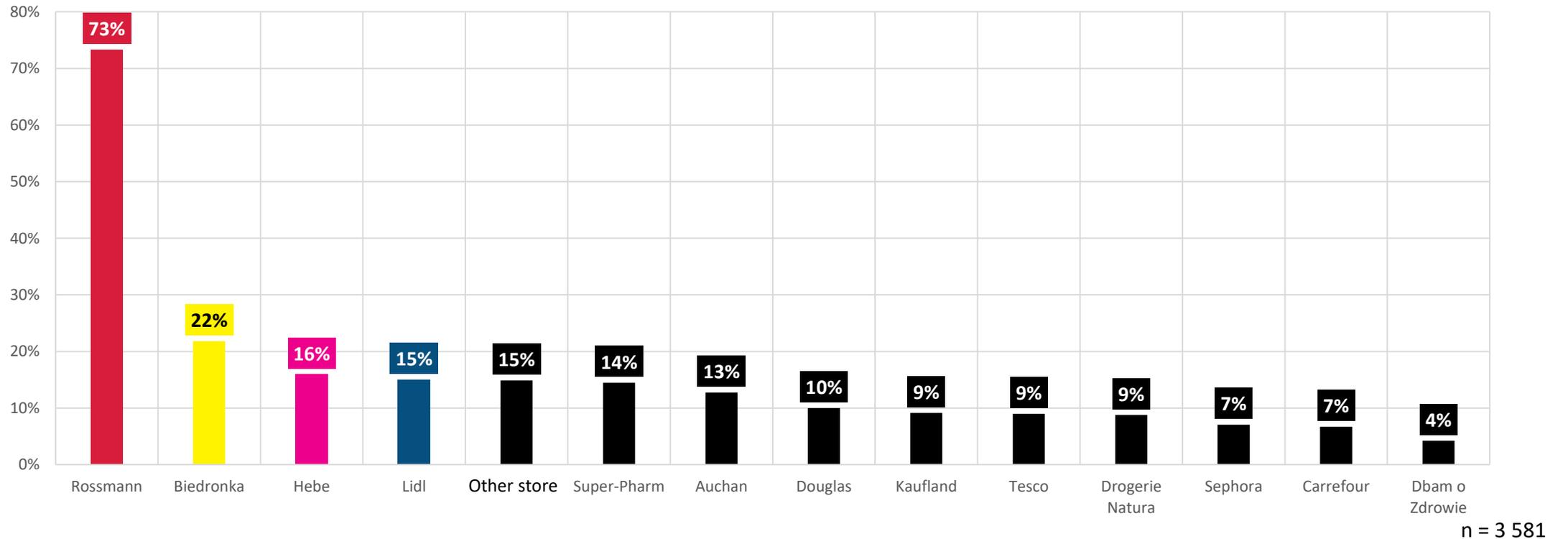


# Research methodology

- Qualitative data of a quantitative nature collected **anonymously and voluntarily**, without any gratification;
- Respondents were able to participate and fill the survey **only once online**;
- The target group of the study corresponding to the cross-sectional profile of the Internet user in Poland;
- Over **1,000,000 consumers** reached through research partners;
- Almost **50,000** completed surveys;
- A **multi-page survey**, consisting of cascading questions, with no mandatory questions;
- **Standardized** sets of questions for each of the segments with a limitation of up to 3-4 segments per survey;
- Common measure of **NPS** methodology for offline and online purchases;
- Time of conducting research: **May-June 2018**;
- Selected e-commerce segments reflect the **industries of key projects** implemented by **YourCX**;
- **Research partners**: Leroy Merlin, Decathlon, Play, T-Mobile, Multikino, Rossmann, Media Markt.

# In which shops do you usually buy cosmetics, medicines, dietary supplements, hygiene products or products for babies?

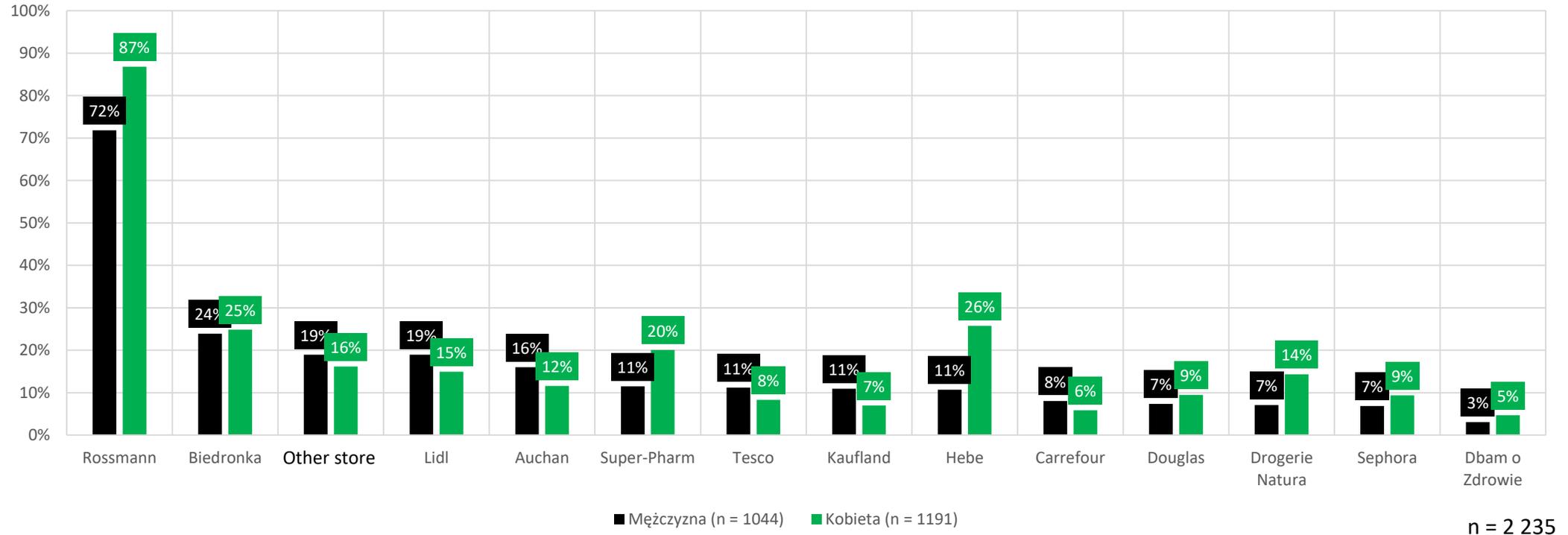
Multiple-choice question



The decisive market leader is Rossmann, where as much as 73% of Internet users buy. The second place is taken by Biedronka, where cosmetics and hygiene products are bought by 22% of respondents. Hebe chooses 16% and Lidl 15%. The lowest share is held by Dbam o Zdrowie, however, in this study we focused on specific products and not on traditional pharmacies.

# In which shops do you usually buy cosmetics, medicines, dietary supplements, hygiene products or products for babies?

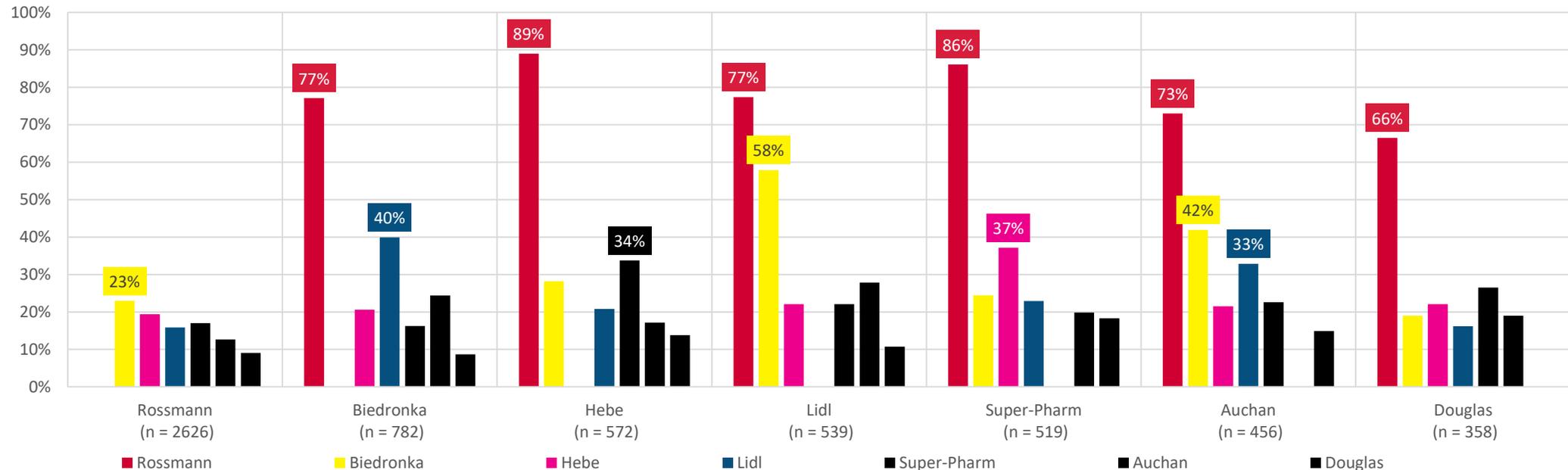
## Analysis by gender



The biggest differences are for Hebe and Drogerie Natura, whose soft design, together with the right product strategy, means that they are used by many more women. In other places, the share is almost half-way through. Rossmann's position among women is impressive: as many as 87% of women declare that they shop there. Rossmann is also men's favourite shop, although they buy more often than women in such places as Lidl, Auchan, Tesco, Kaufland.

# In which shops do you usually buy cosmetics, medicines, dietary supplements, hygiene products or products for babies?

Correlations between shops

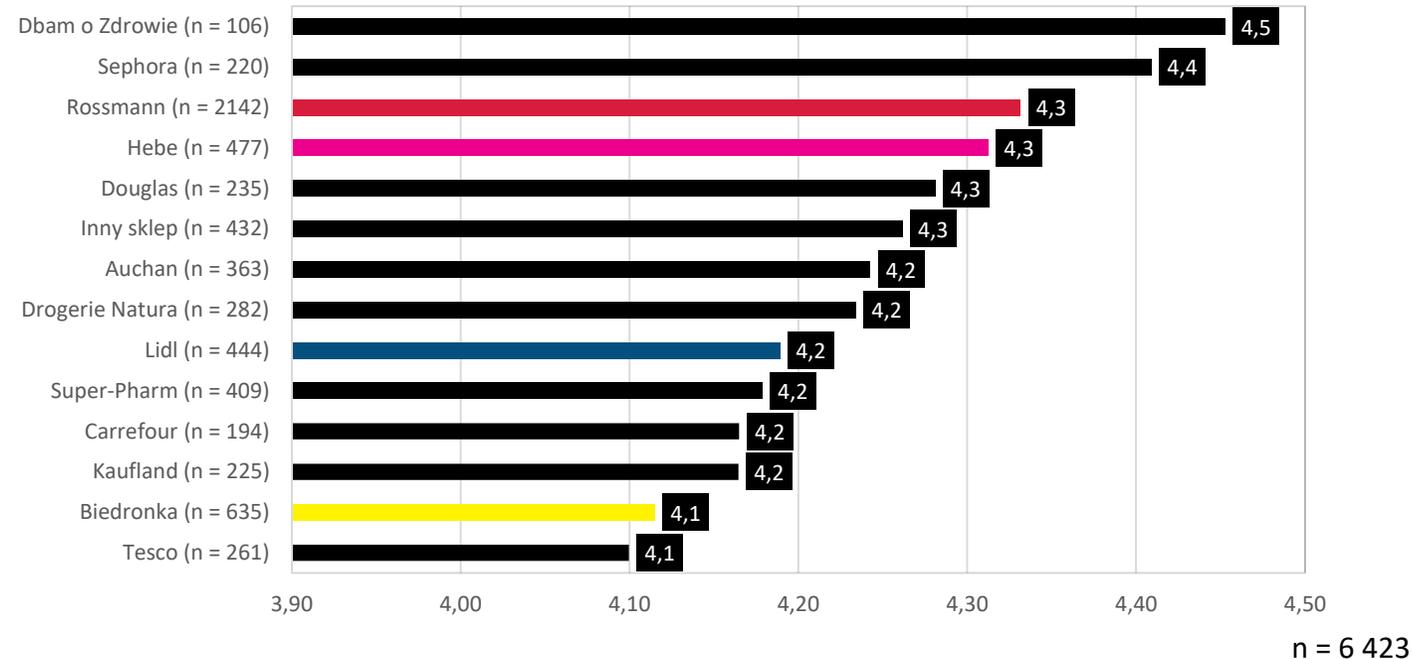


n = 5 852

Rossmann's dominant position means that even if we buy the drugstore products in other stores, 66-89% of us also use this chain. There is also a high correlation between some chains. If we buy in Biedronka, then also in Lidl and sometimes in Auchan. It probably depends on what we have at hand or what size we buy. Handy items we buy more often in Biedronka, Lidl, but if we organize an expedition for many goods, we buy drugstore products in large supermarkets.

# Taking into account your recent purchases, to what extent have you achieved your goal?

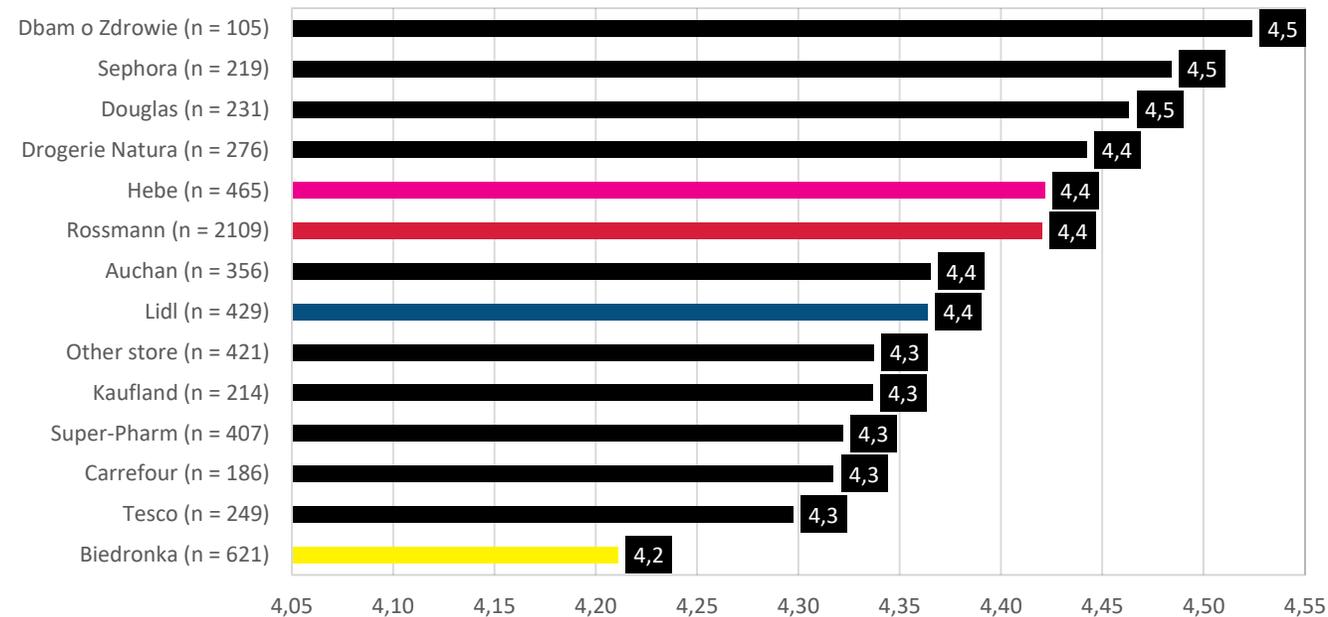
Evaluation on a scale from 1 to 5



The DoZ network is the leader in the evaluation of the achieved purchase goals with a score of 4.5, followed by Sephora (4.4), Rossmann (4.3) and Hebe (4.3). Despite the fact that Biedronka is chosen by one in five respondents, she achieves one of the lowest results in this category - 4.1.

# Evaluate the ease of purchase

Evaluation on a scale from 1 to 5

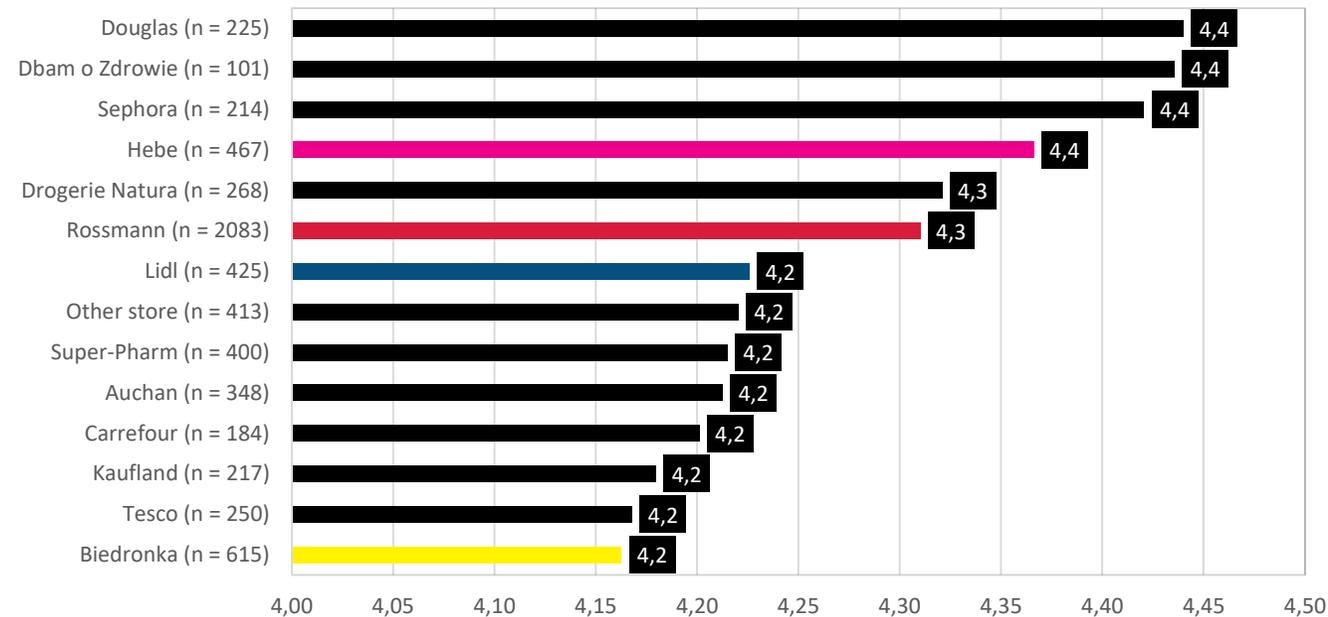


n = 6 288

The ease of purchase execution is assessed similarly: DoZ is also the leader here (4.5), and Biedronka gets the lowest score (4.2). The two largest drugstore chains, Rossmann and Hebe, receive the same rating, however, the ease of purchase execution is rated quite high in this market segment, with no average result dropping below 4.0.

# Rate satisfaction with your purchase

Evaluation on a scale from 1 to 5

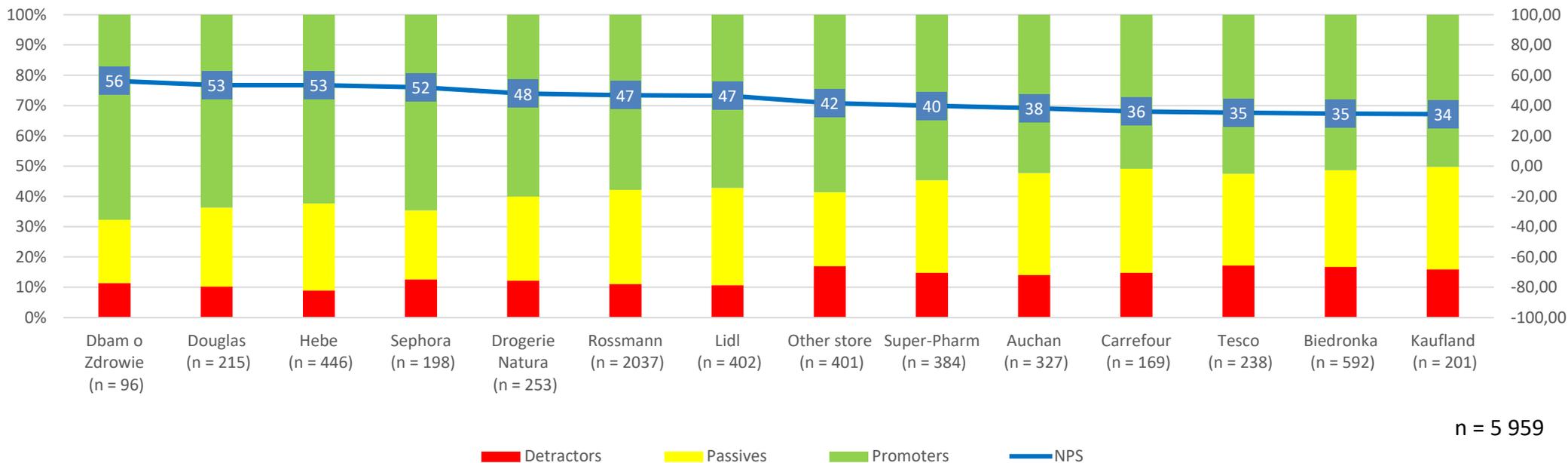


n = 6 210

The customers of Douglas (4.4), DoZ (4.4) and Sephora (4.4) are the most satisfied with the purchases. As in the previous categories, the differences in the assessment of individual entities are not significant: the lowest score is given to Biedronka, but it is still the average score of more than 4.

# How likely is it that you would recommend these stores to your friends?

## Net Promoter Score (NPS)



A similar trend can be observed in the context of recommending the store to friends. Average NPS indicators are very similar. Looking at the distribution of loyalty, we can see that the difference in the share of Promoters may be crucial for these entities. For example, Dbam o Zdrowie can boast a NPS ratio of 56 (where 68% of customers are Promoters). In Kaufland, Promoters already account for 50% of customers. It is worth remembering, however, that the question about the willingness to recommend is addressed to people who often do their shopping in particular locations.

# How likely is it that you would recommend these stores to your friends?

Comment

Net Promoter Score is a methodology for assessing consumer loyalty designed to improve loyalty based on the optimization of customer experience. 9 out of 10 consumers say that the recommendations of friends and family are the most important when making a purchasing decision. Word of mouth marketing is therefore the most effective form of selling services.

The NPS indicator is based on one question: "How likely is it that you will recommend a brand / product / service to your friends?". The recipient determines the probability on a scale from 0 (would not recommend) to 10 (would certainly recommend). Based on these assessments, the respondents are divided into three groups: Detractors (those who definitely will not recommend, they choose values from the range of 0-6), Passive (satisfied, but not willing to recommend, choose 7 and 8) and Promoters (loyal fans of the brand, choosing values 9 and 10).

Larger research projects are based on crossing large amounts of data and segmentation of behaviors into groups of Promoters, Passive and Detractors. YourCX performs such analyzes, for example in relation to experiences in cinema networks, the usefulness of e-commerce platforms or the availability of offers of telecommunications network service providers. The NPS indicator can also be used in remarketing: by directing the advert to the Promoters we have a better chance that it will be effective, similarly to activities in social media.

**Jakub Kołaciński**

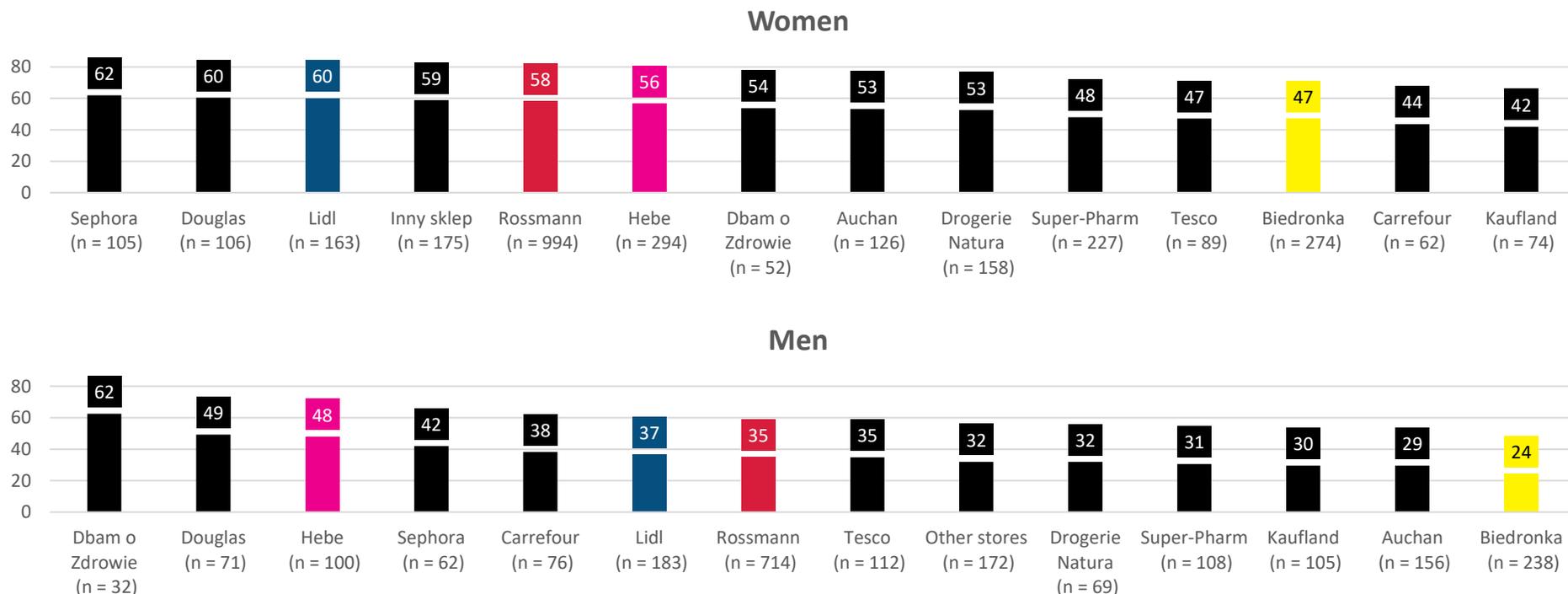
Project Manager

**YourCX**



# How likely is it that you would recommend these stores to your friends?

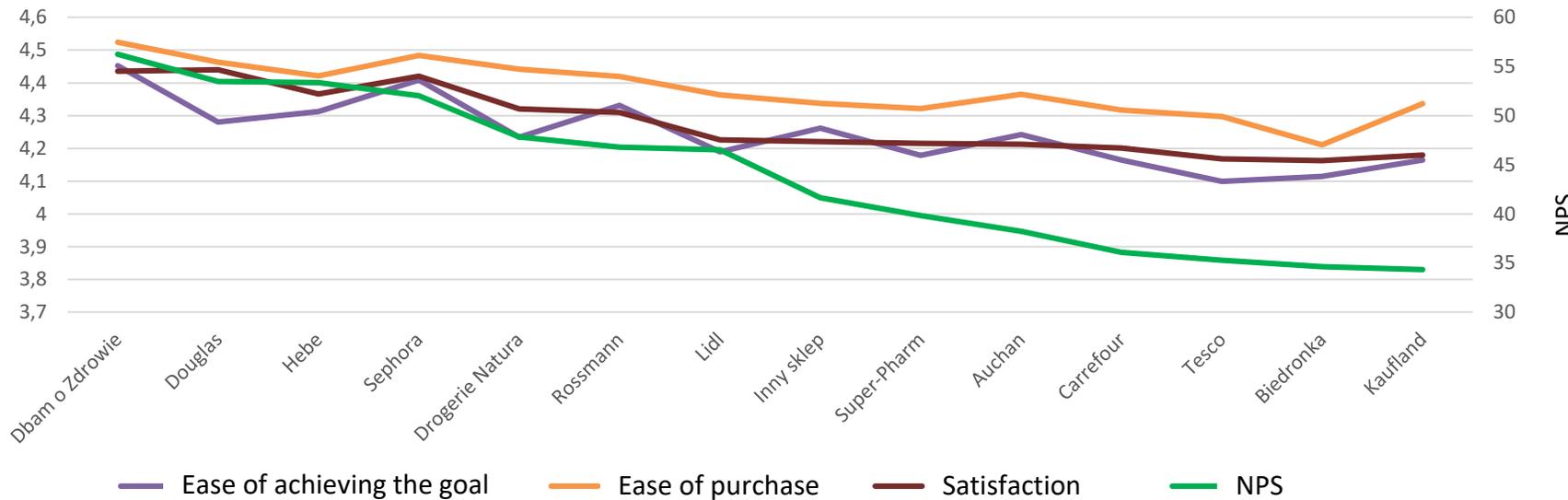
## NPS by gender



Analysis of the NPS indicator by gender of respondents clearly shows that women are much more likely to recommend a favorite store than men. The lowest NPS among women got Kaufland (42), while among men it is Biedronka with a score of 24. Men are much more willing than women to recommend a DoZ store.

# Correlation analysis

Dependence of the willingness to recommend on satisfaction, the degree of achievement of the goal and ease of purchase

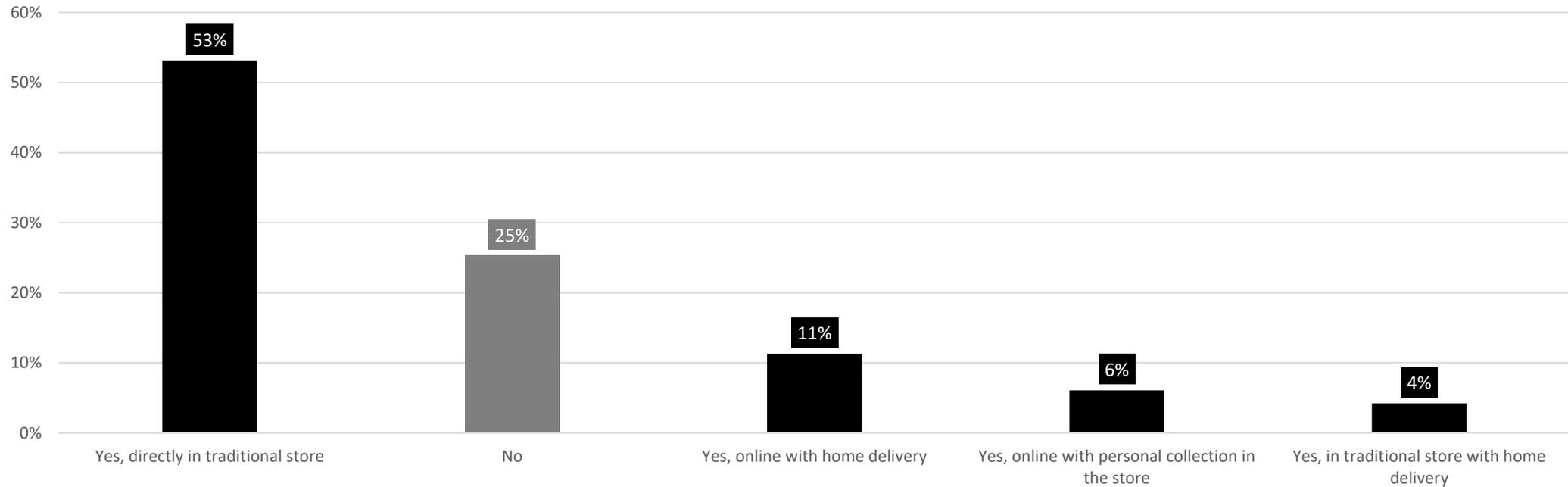


**Correlations with NPS:**  
Achieving the goal = 0.52  
Ease of purchase = 0.51  
Satisfaction = 0.60

These are very strong correlations indicating a direct dependence of the willingness to recommend on satisfaction, the degree of achievement of the goal and ease of purchase.

# Have you recently bought cosmetics, medicines, dietary supplements, hygiene products or baby products?

Single-choice question



n = 2 831

On average, three out of four respondents have recently purchased cosmetics and hygiene products. The most popular way of purchase is direct purchase at a stationary point, which chooses as much as 53% of all respondents. Online shopping with delivery is chosen by only 11% of Internet users, online shopping with collection in a shop by only 6%, and 4% prefer to buy in a shop with home delivery.

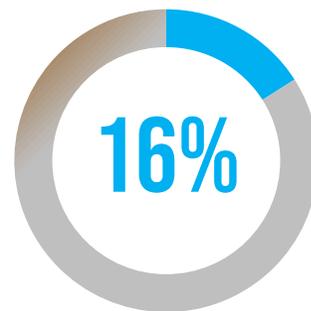
# Are you looking for information on the Internet before buying cosmetics or perfumes in a traditional store?

Single-choice question

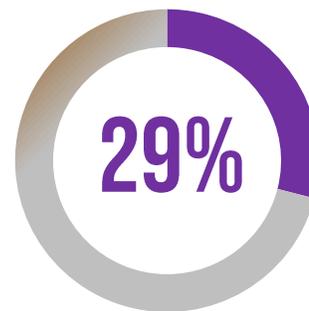


## ALWAYS

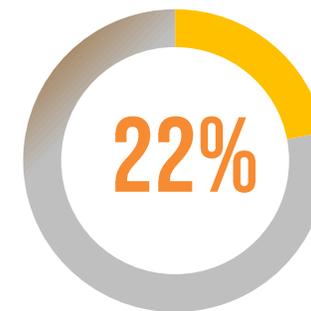
Looks for information online before buying in a traditional store. The **ROPO effect** is low.



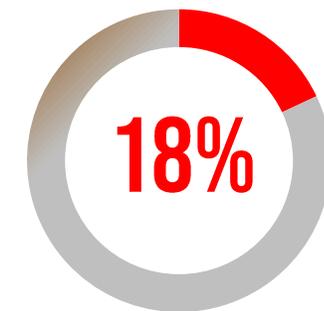
OFTEN



SOMETIMES



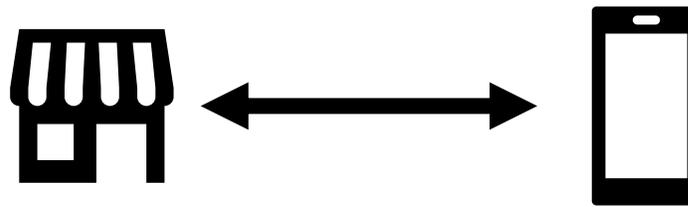
RARELY



NEVER

# Are you looking for information about the offer on your smartphone while shopping in a traditional store?

Single-choice question



# What information are you looking for?

People looking for information on their smartphone while visiting a stationary store. Multiple choice question



81%

compares prices



35%

checks detailed info



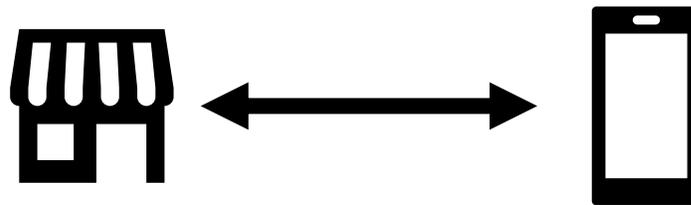
51%

looks for reviews



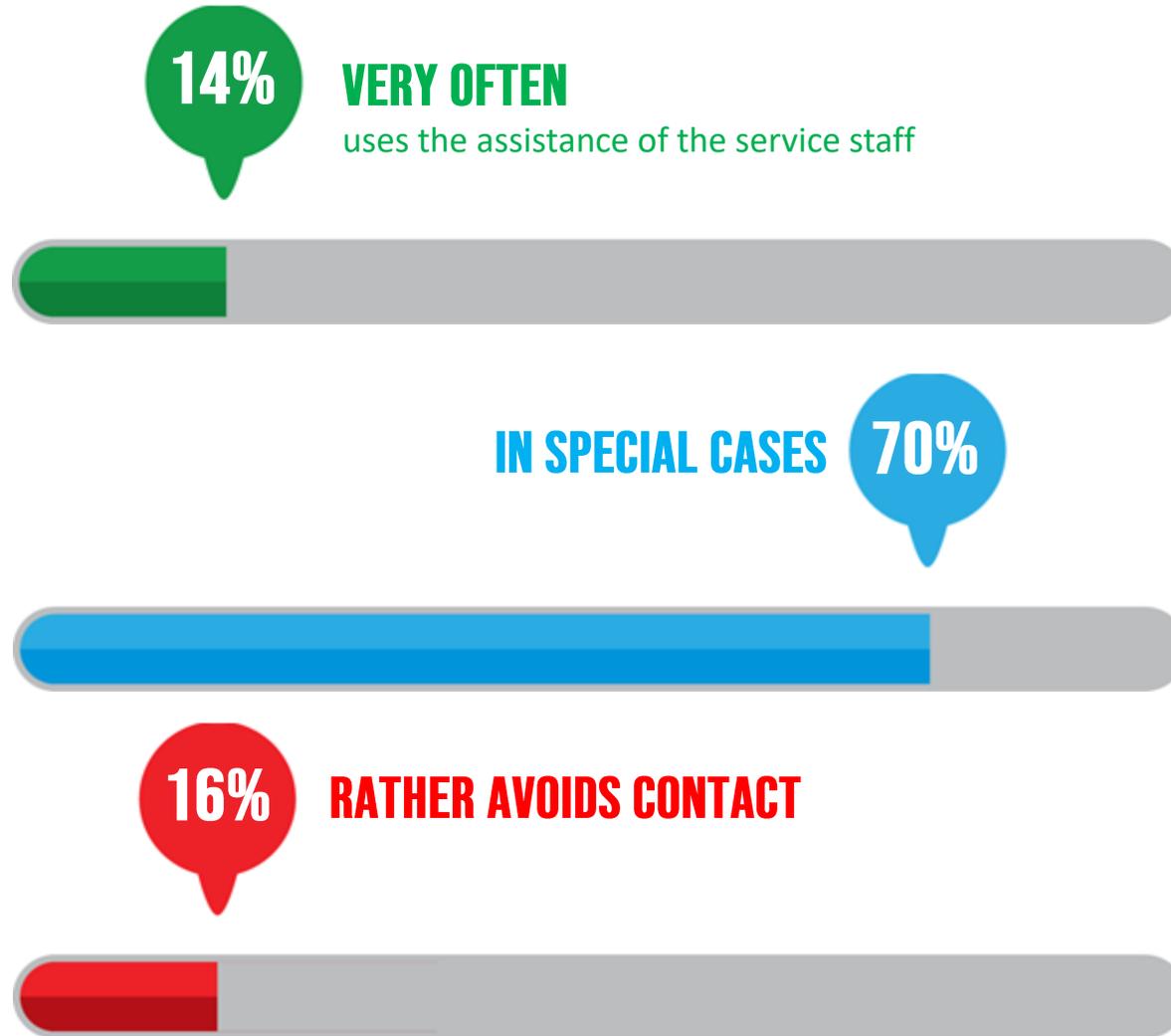
18%

seeks alternatives



# Do you use the assistance of the service staff when shopping at a traditional store?

Single-choice question



# What do you ask about most often?

Clients using the assistance of the staff. Multiple-choice question



81%

needs help  
in finding a product



35%

seeks product advice



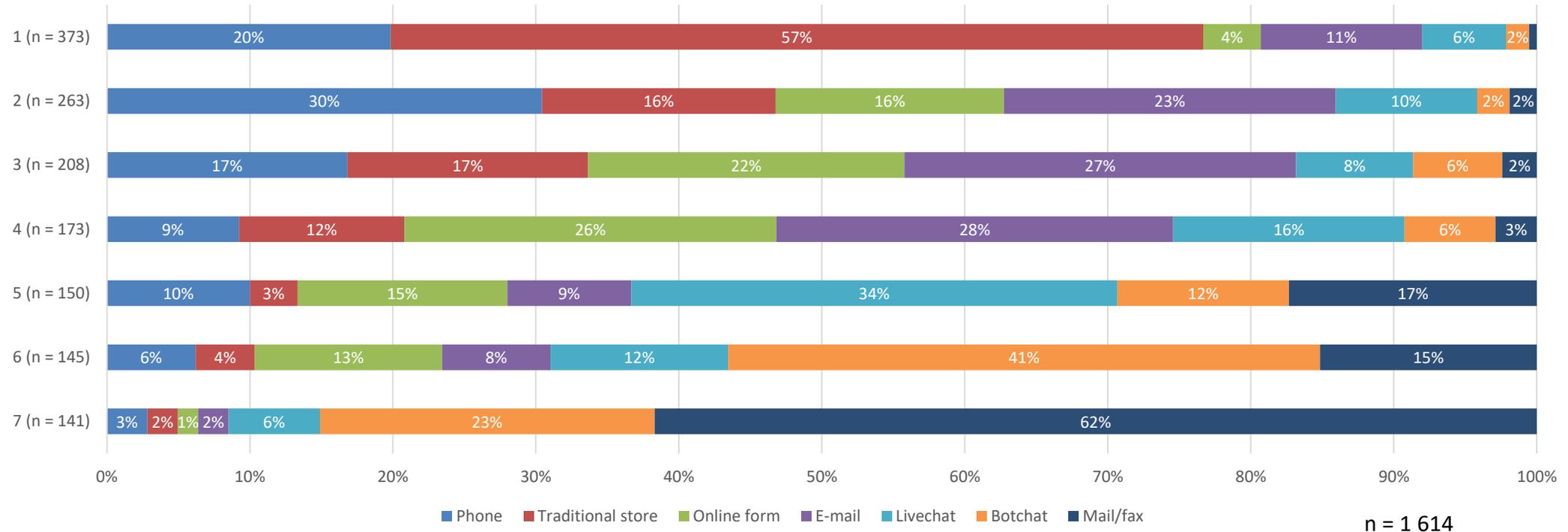
20%

asks for details  
of the promotion



# How would you like to contact a traditional store if necessary?

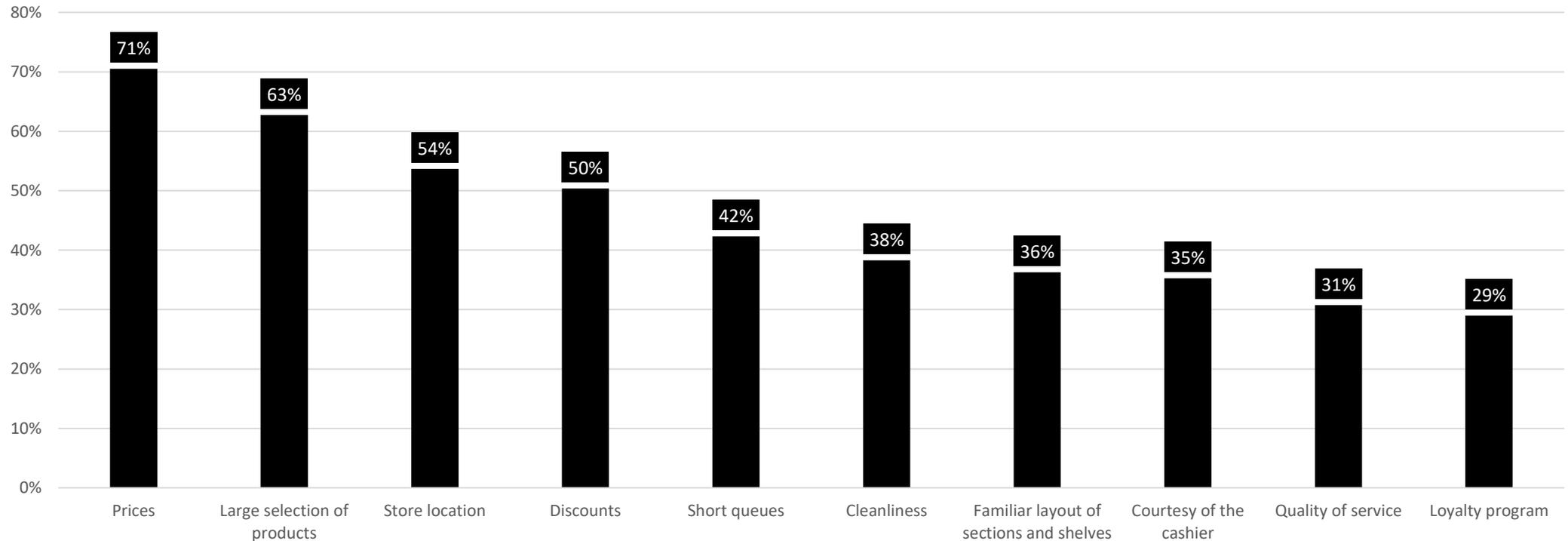
Starting with the way you prefer the most



Respondents ranked the channels of contact with the traditional store, starting with the one they prefer the most. More than half of the respondents (57%) put personal contact in the first place. 20% choose telephone contact and 11% e-mail. The second place is dominated by telephone and e-mail contact. Written forms and botchat are not very popular.

# What is most important to you when shopping in a traditional store?

Multiple-choice question



The most important are prices, a key factor for as many as 71% of respondents. A wide selection of products is noticed by 63%, and a convenient location is determined by the choice of the shop of half of the respondents. Interestingly, loyalty programs are the least frequently indicated.

# If it were possible, would you rate your visit to a stationary store using questionnaires, rating screens or buttons with smileys?

Single-choice question



If had the time and willingness to



Very often, regardless of the situation



Would not

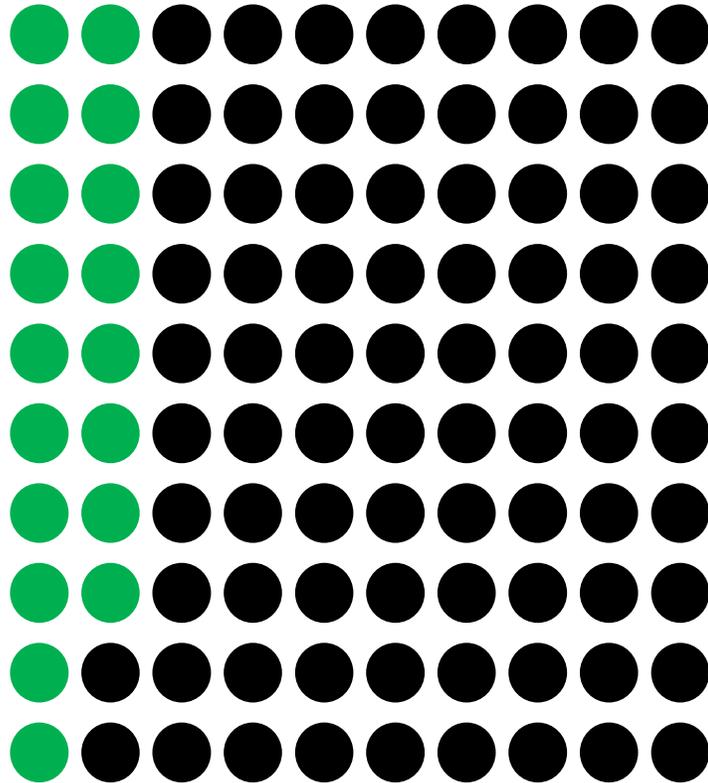


Will evaluate only in case of dissatisfaction



# Before buying cosmetics or perfumes online, do you visit traditional store to get acquainted with the product?

Single-choice question

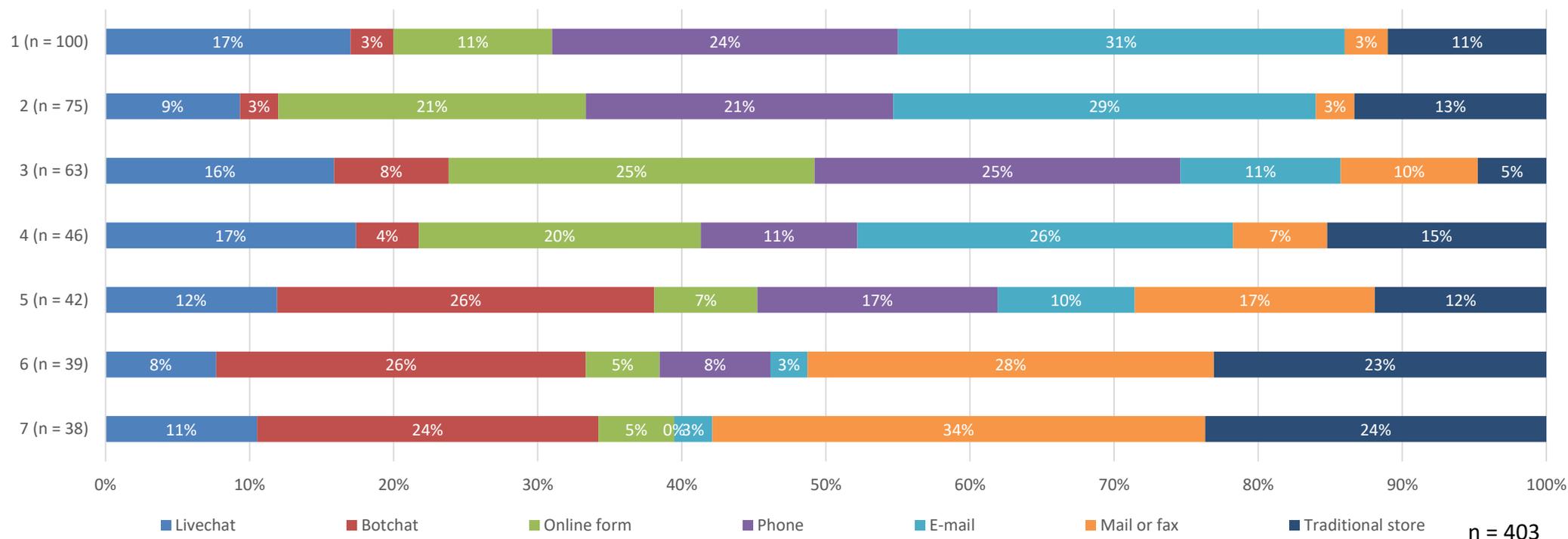


# 18%

surveyed **always** visits traditional store before online purchase. 13% does it **often**, 34% **sometimes**, 18% **rarely** and 16% **never**.

# How would you like to contact the online store if necessary?

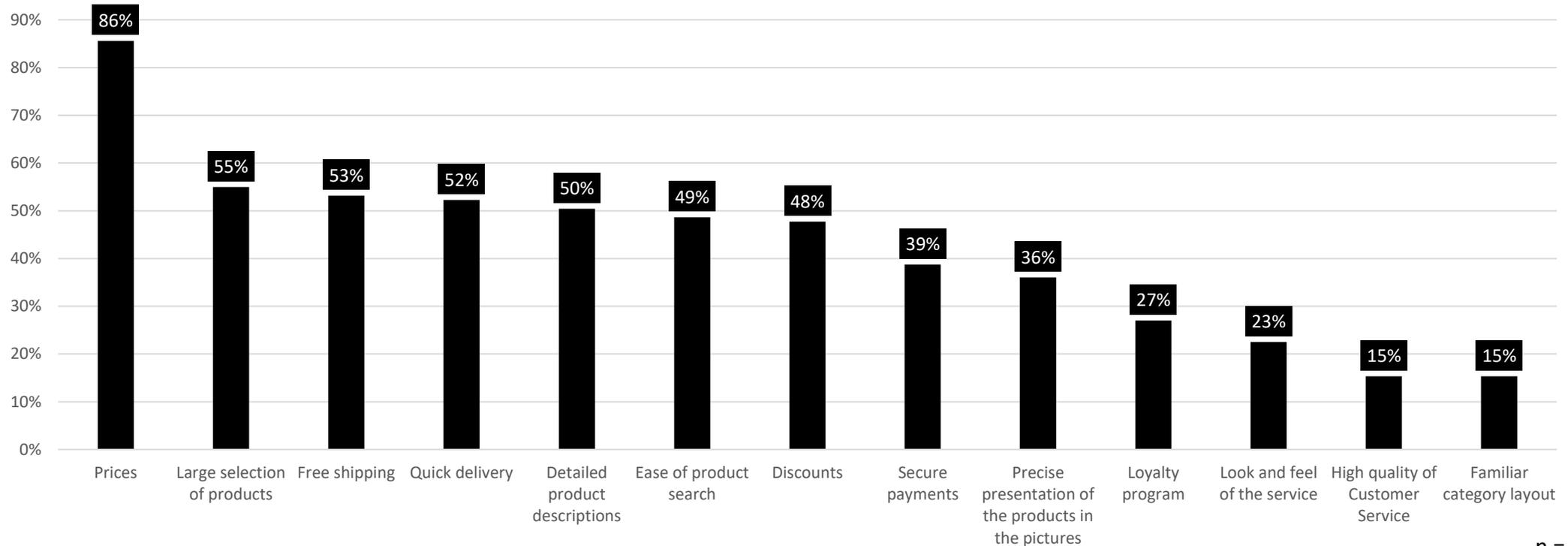
Starting with the way you prefer the most



Respondents ranked the channels of contact with the online store starting with the one they prefer the most. The first place is won by e-mail (31%) and telephone (24%). 17% prefer to settle a matter with Livechat. Conversations through botchat, written contact and going to a store are by far the least popular forms of contact in case of problems with a „virtual” retailer.

# What is most important for you when shopping in the online store?

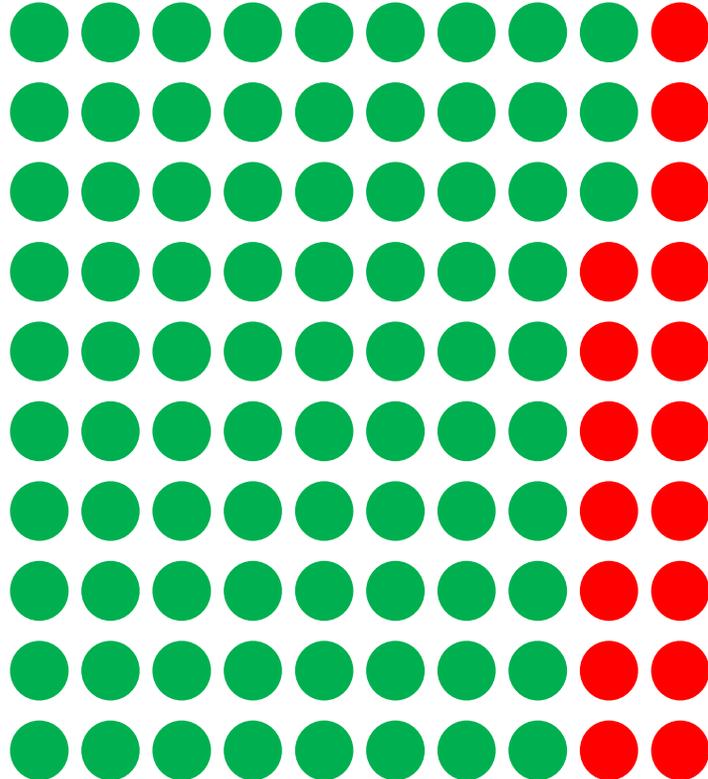
Multiple-choice question



In online shopping, prices are the most important for as much as 86% of respondents. Therefore, prices are much more important in online than traditional channel. Every second customer of an online store will appreciate free shipping, detailed product descriptions and a simple search. The low number of indications of "familiar category layout" also shows that customers expect quality and changes for the better, even at the expense of habits.

# If it were possible, would you rate your satisfaction with the online store using surveys?

Single-choice question

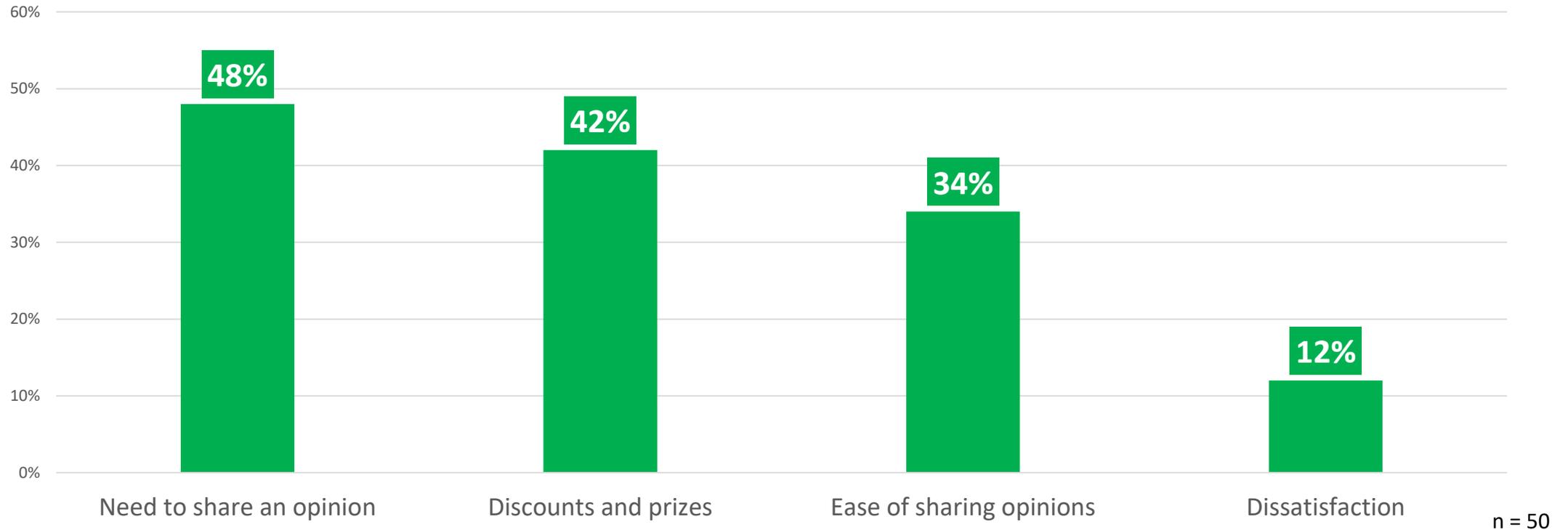


# 83%

of respondents will evaluate their experiences with the online store. Only **17%** of respondents won't.

# What would make you evaluate?

Multiple-choice question



The motivation for half of those willing to share their feedback with the online shop is simply the need to share their opinions. Rational arguments in the form of discounts and prizes are expected by 42% of respondents, and 34% pay attention to the ease of sharing opinions (constant CX research is the answer to this need). Only 12% say that the motivation to evaluate would be simply dissatisfaction.

# Omnichannel 2018

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**Drugstores**



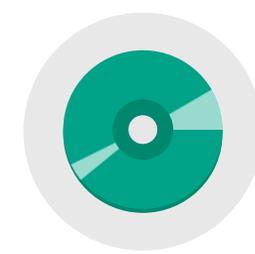
**Sporting goods**



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**Household  
appliances**



**Books, music,  
multimedia**

# We invite you to contact us and **cooperate!**

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# Your**CX**

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