Omnichannel 2018

Fashion industry in Poland

YourCX

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.

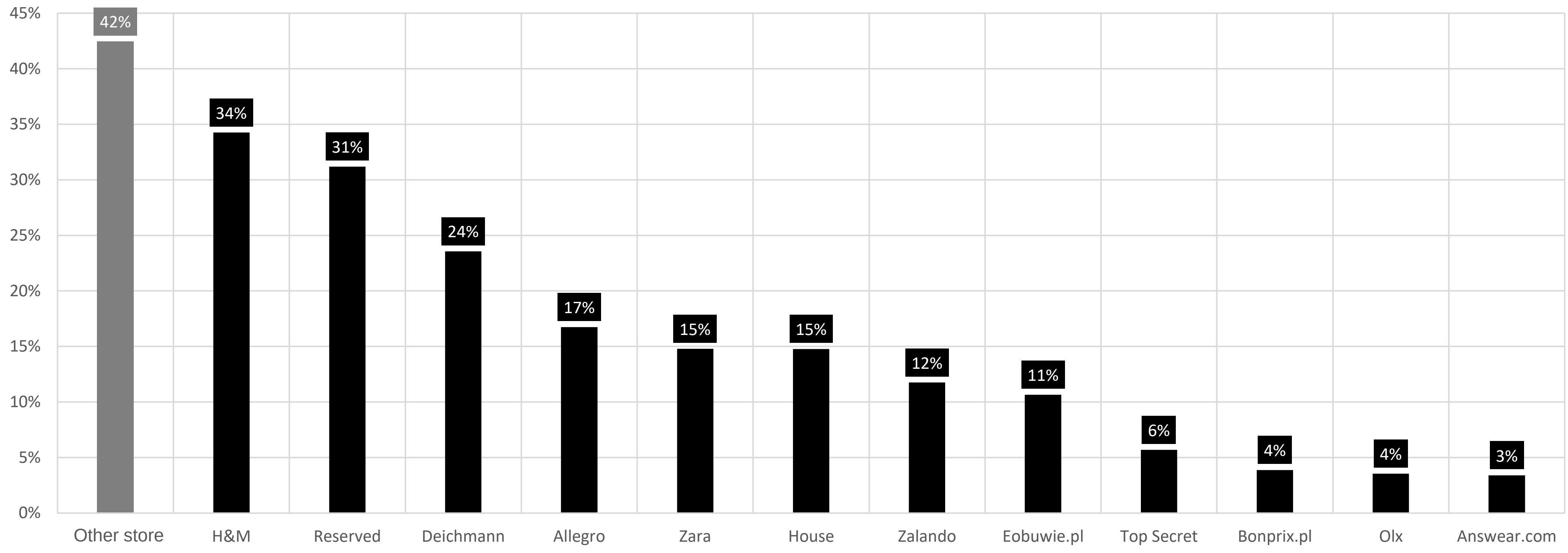
Piotr Wojnarowicz
CEO YourCX

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 stores do you usually buy clothes or shoes?

A multiple choice question

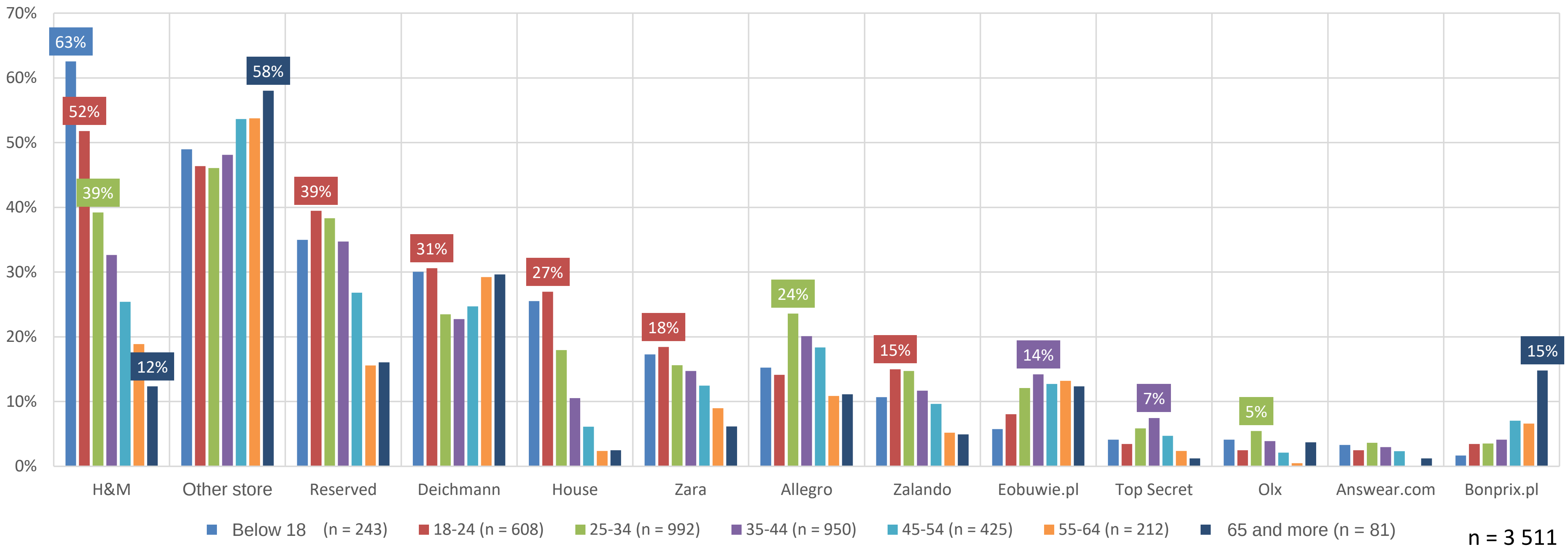


n = 6 480

A large selection of online and traditional retailers operating in the fashion industry means that as many as 42% of respondents declared shopping at the store different than the ones proposed in the survey. The leader in Poland is **H&M**, chosen by 34% of respondents. 31% buy at Reserved and 24% in Deichmann. Allegro platform is chosen by 17% of the respondents.

In which stores do you usually buy clothes or shoes?

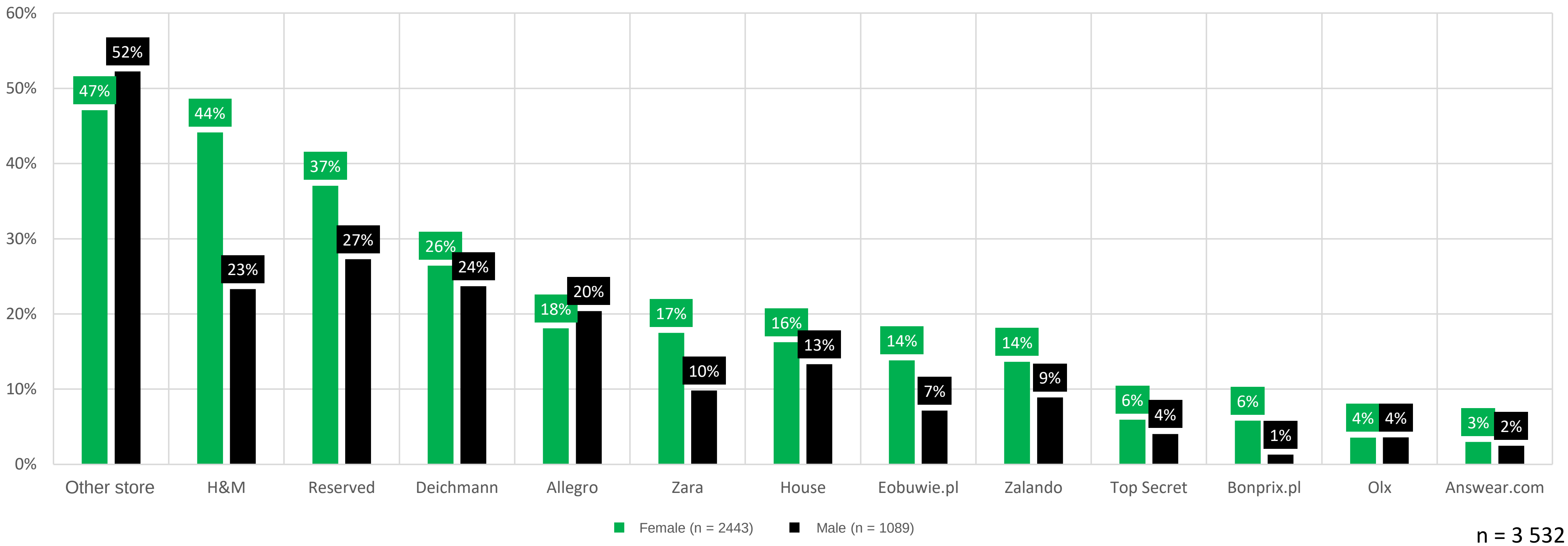
Analysis by age



63% of those under the age of 18 shop at **H&M**. This brand is definitely preferred by young people, as market share for subsequent age ranges is gradually decreasing. People over 65 years old most often indicate **other stores** (as much as 58%). Older people buy much more often at **Bonprix.pl** than the youngest ones.

In which stores do you usually buy clothes or shoes?

Analysis by sex

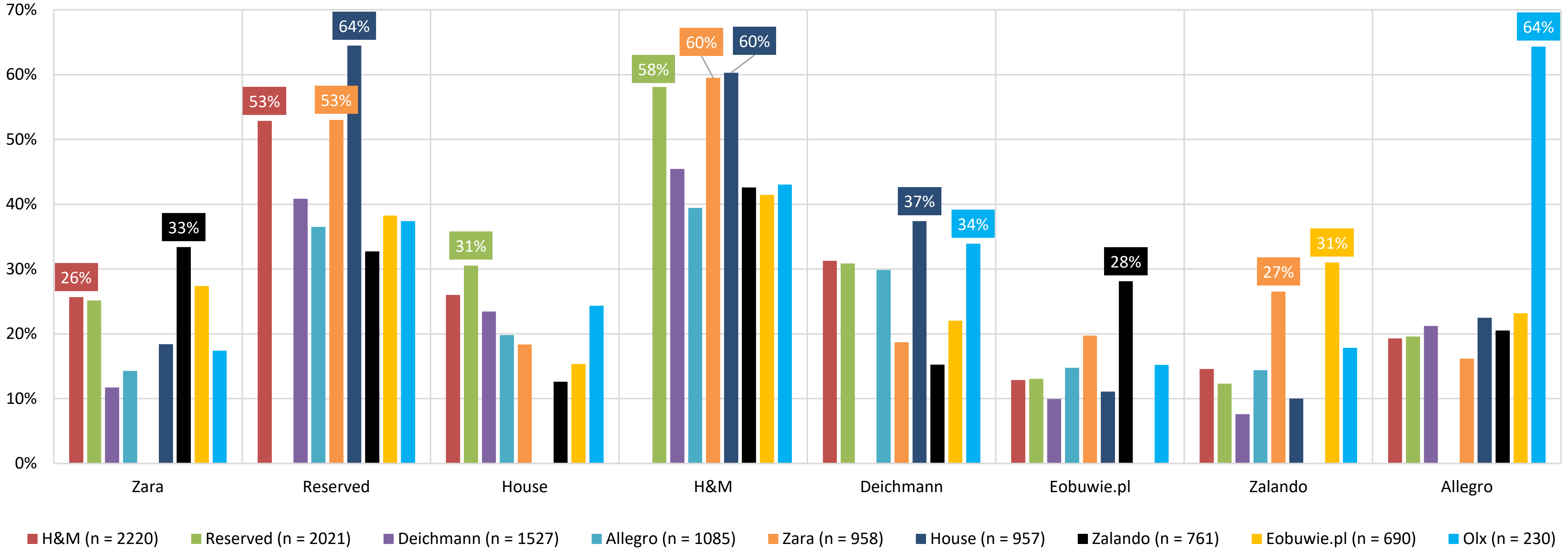


n = 3 532

The differences in the choice of a clothing stores are particularly evident in **H&M**, where 44% of women and only 23% of men do shopping. Men prefer **other stores** (52%), **Reserved** (23%), **Deichmann** (24%) and **Allegro** (20%). Women more often than men do shopping in **Reserved** (37%), **Zara** (17%), **Eobuwie.pl** (14%) and **Zalando** (14%).

In which stores do you usually buy clothes or shoes?

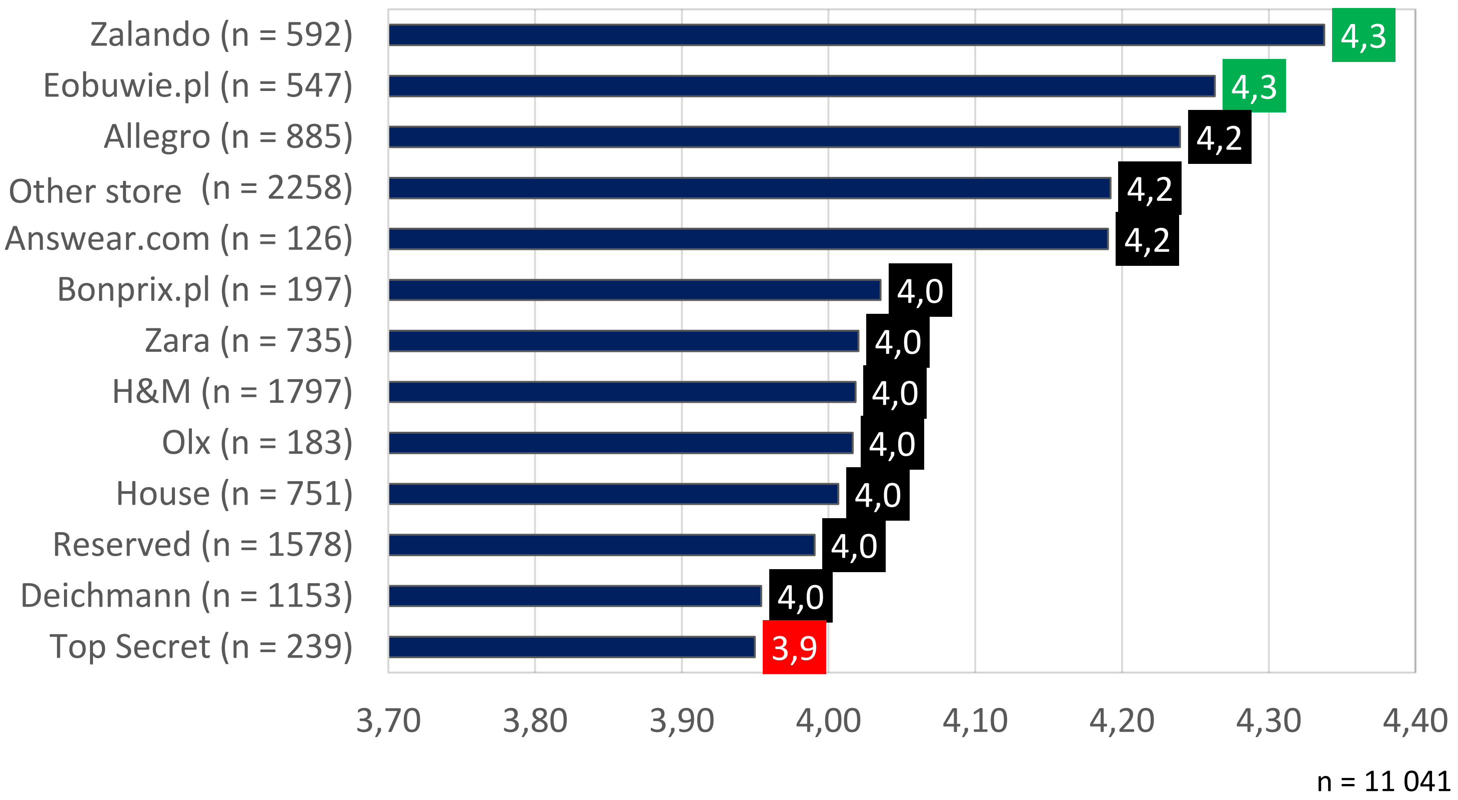
Correlations between stores



The above analysis shows which stores are also considered by customers of particular brands. We can see that **H&M** customers often buy in **Zara** (60% of H&M clients), **House** (also 60%) and **Reserved** (58%). 64% of **Allegro** users also choose **Olx**. 28% of **Eobuwie.pl** customers will additionally buy at **Zalando**.

Having regard to your recent purchases, to what extent have you reached your shopping goal?

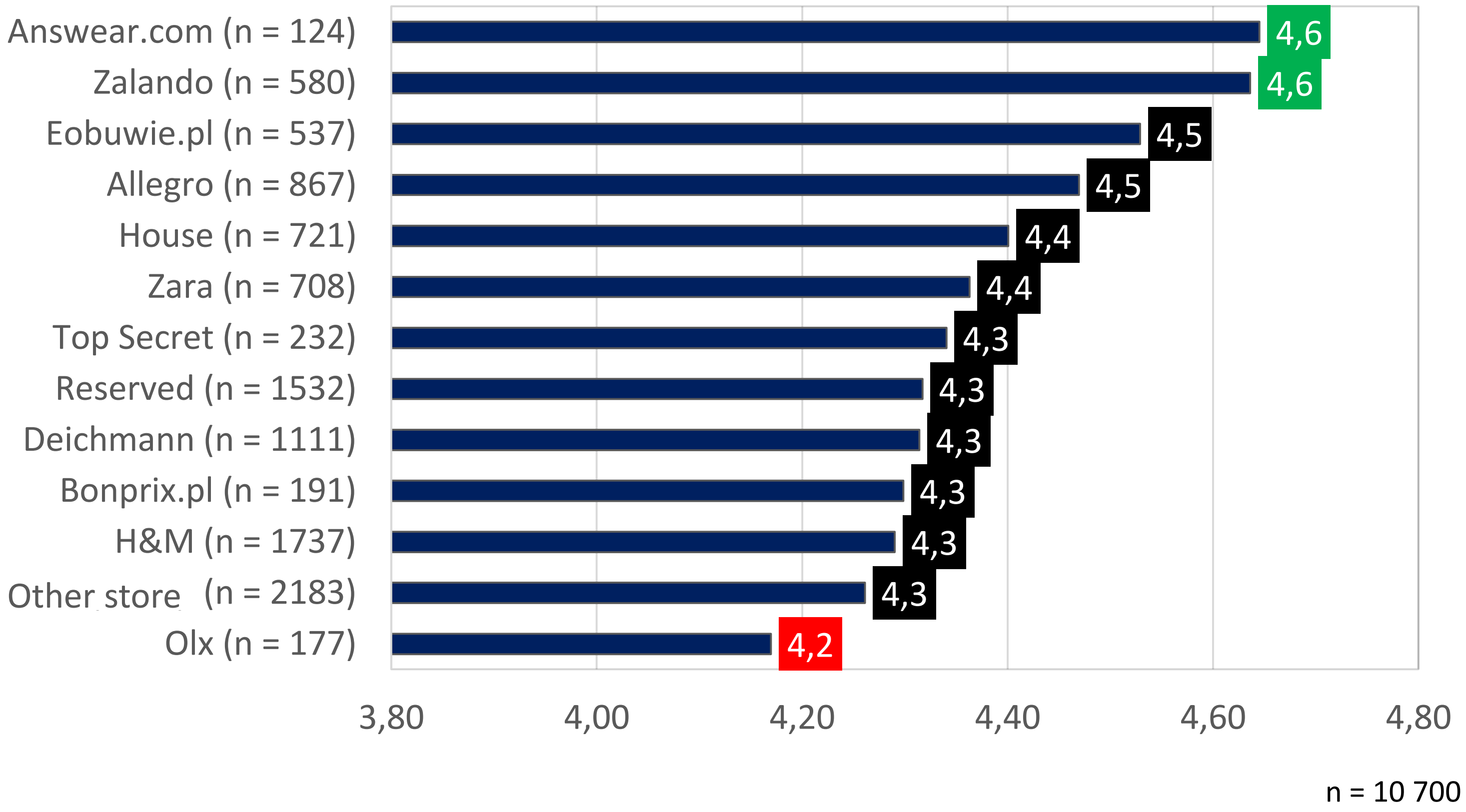
Rating on a scale of 1 to 5



Zalando is the leader in terms of achieving the assumed shopping goals with an average result of over 4.3. Eobuwie.pl is in the second place with a result slightly below 4.3. The leader of the Polish market, H&M, is estimated at 4.0 (33% are fully satisfied with achieving shopping goals).

Rate the ease of purchase

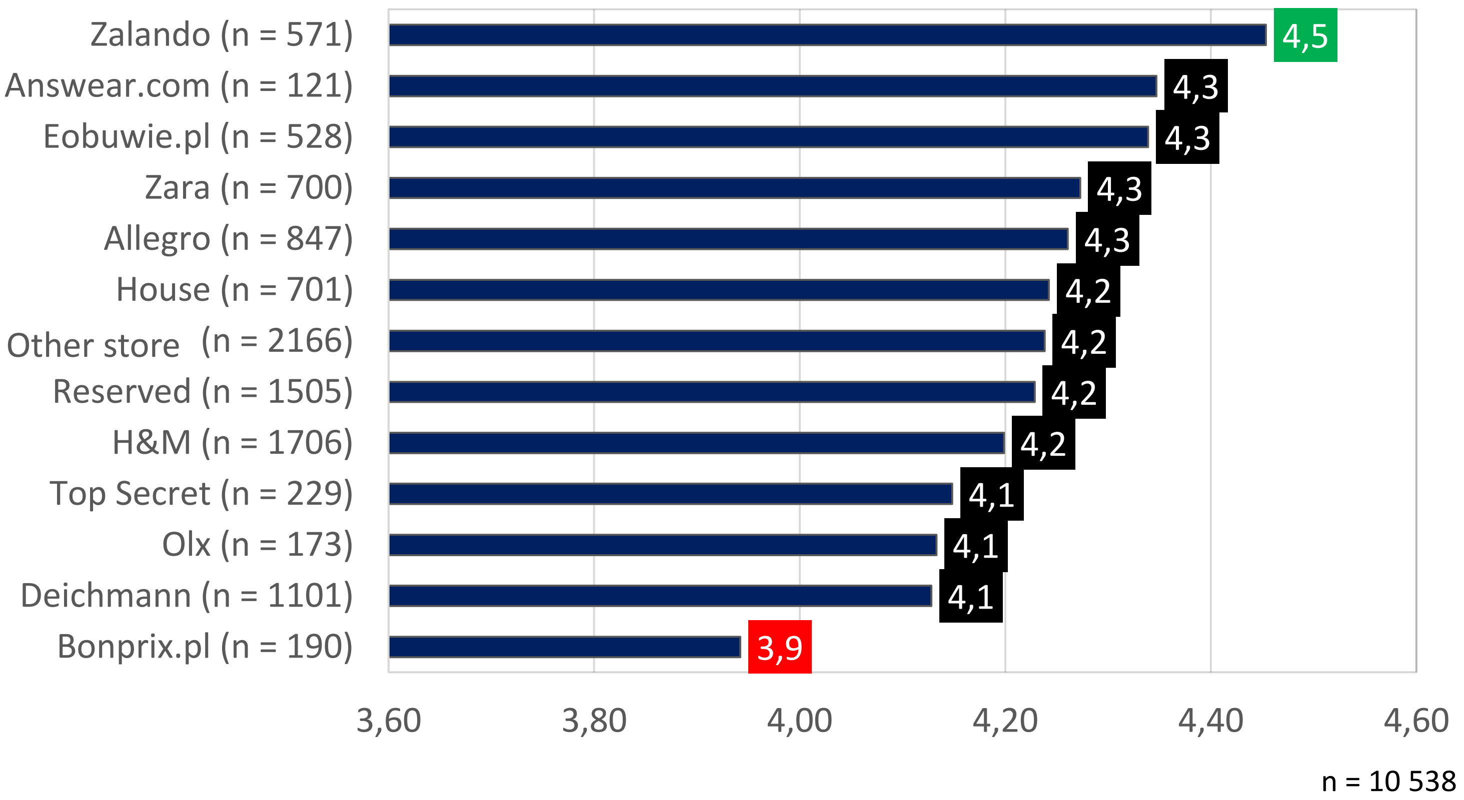
Rating on a scale of 1 to 5



The easiness of the purchase is rated best by Answear.com customers, where the average is 4.6. Zalando is in the second place with a similar result. Last place belongs to Olx platform, where people estimate the ease of purchas at 4.2.

Evaluate your satisfaction with the purchase

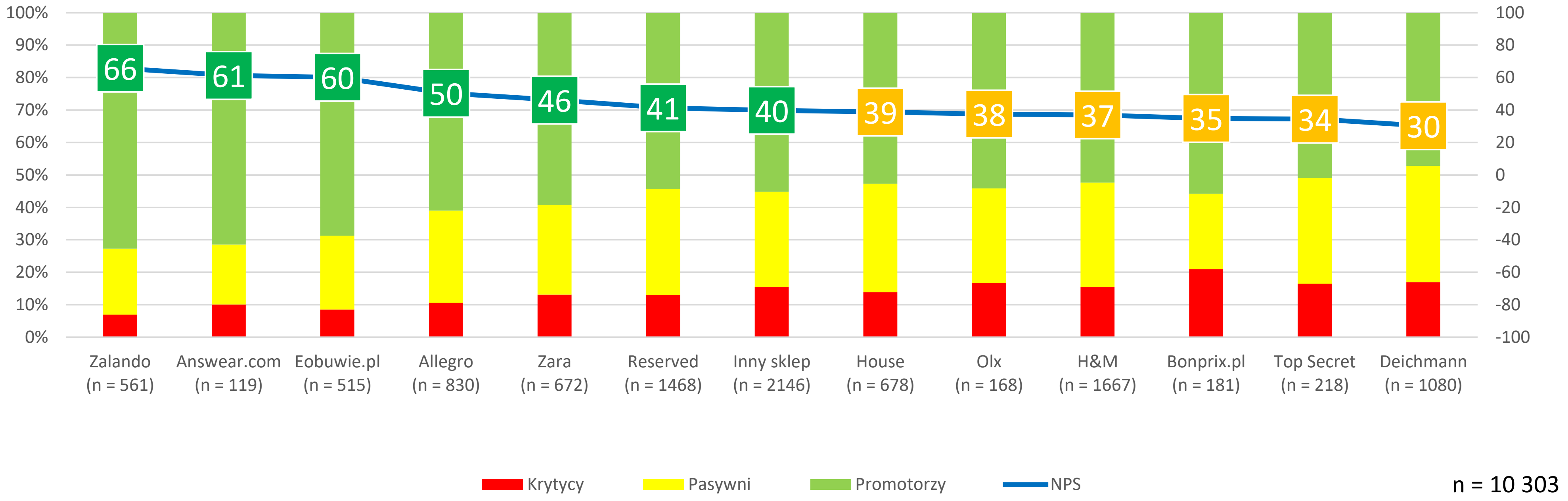
Rating on a scale of 1 to 5



Zalando customers are the most satisfied with shopping in their favorite store, where as many as 55% describe their experiences as sensational, which translates into an average of 4.5. Then, Answear.com and Eobuwie.pl rank similarly, where customers rate their satisfaction at 4.3.

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

Wskaźnik Net Promoter Score (NPS)



Sellers of clothes and shoes are highly recommended by most customers, hence the NPS indicators for individual chains are so high, from 66 for Zalando to 30 for Deichmann. Detractors make up between 5% and 20% of these groups, but it is worth remembering that we ask people declaring regular purchases in given networks. The lower NPS ratio results mainly from the growing share of Passives (in the case of Deichmann, they constitute 36% of customers).

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 Promotors (loyal fans of the brand, choosing values 9 and 10).

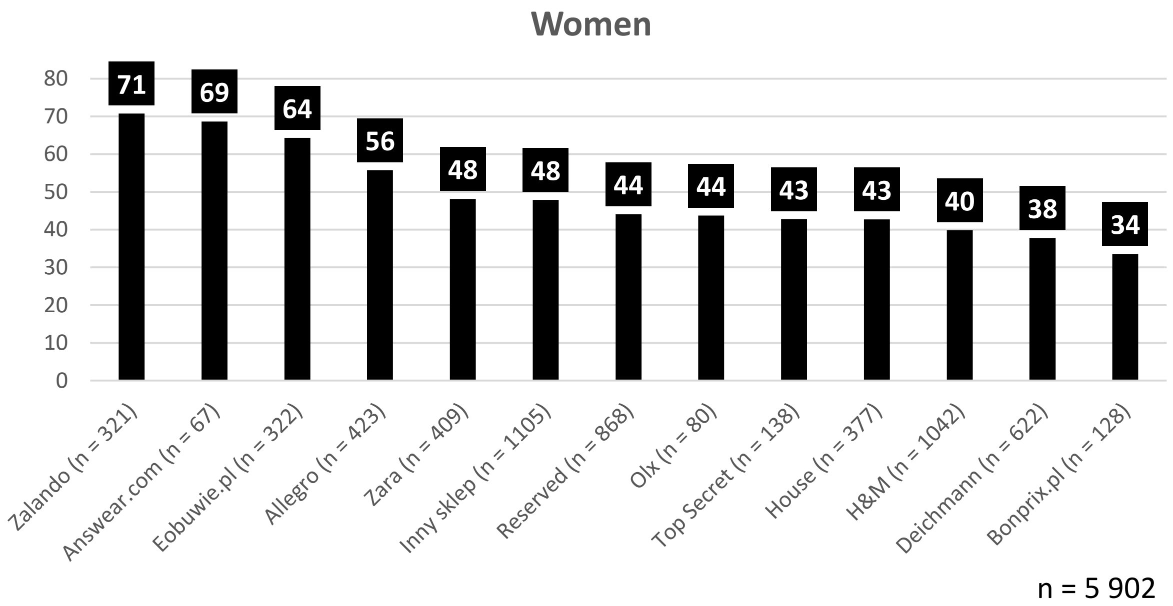
Larger research projects are based on crossing large amounts of data and segmentation of behaviors into groups of Promotors, Passive and Detractors. YourCX performs such analyzes, for example in relation to experiences in cinema networks, the usefulness of e-commerce platforms or the availability of 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.

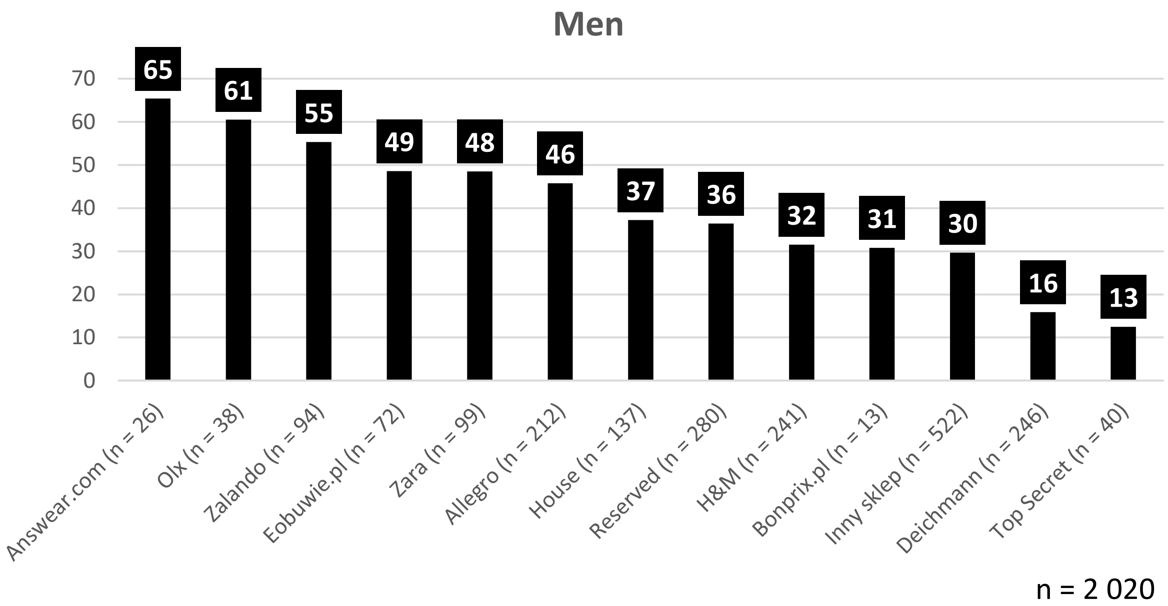
Jakub Kołaciński

Project Manager in YourCX

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

NPS by gender

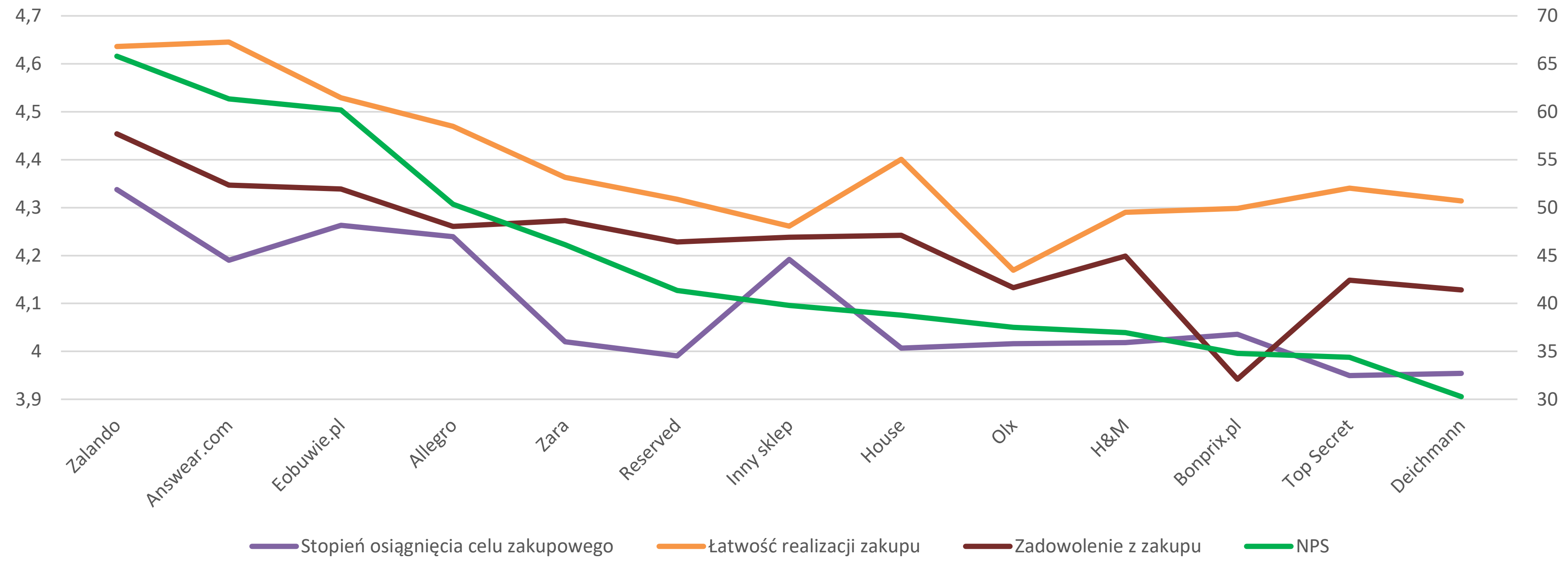




Women are much more likely to recommend their favorite stores. The NPS indicator oscillates between 71 (Zalando is recommended most often) and 34 (Bonprix). Men are most likely to recommend Answear.com (the NPS index is 65), and the most critical are to Deichmann (16) and Top Secret (13).

Correlation analysis

The dependence of the NPS score on satisfaction, the degree of reaching the goal and ease of purchase



Correlations with NPS:

Reaching the goal = **0.57**

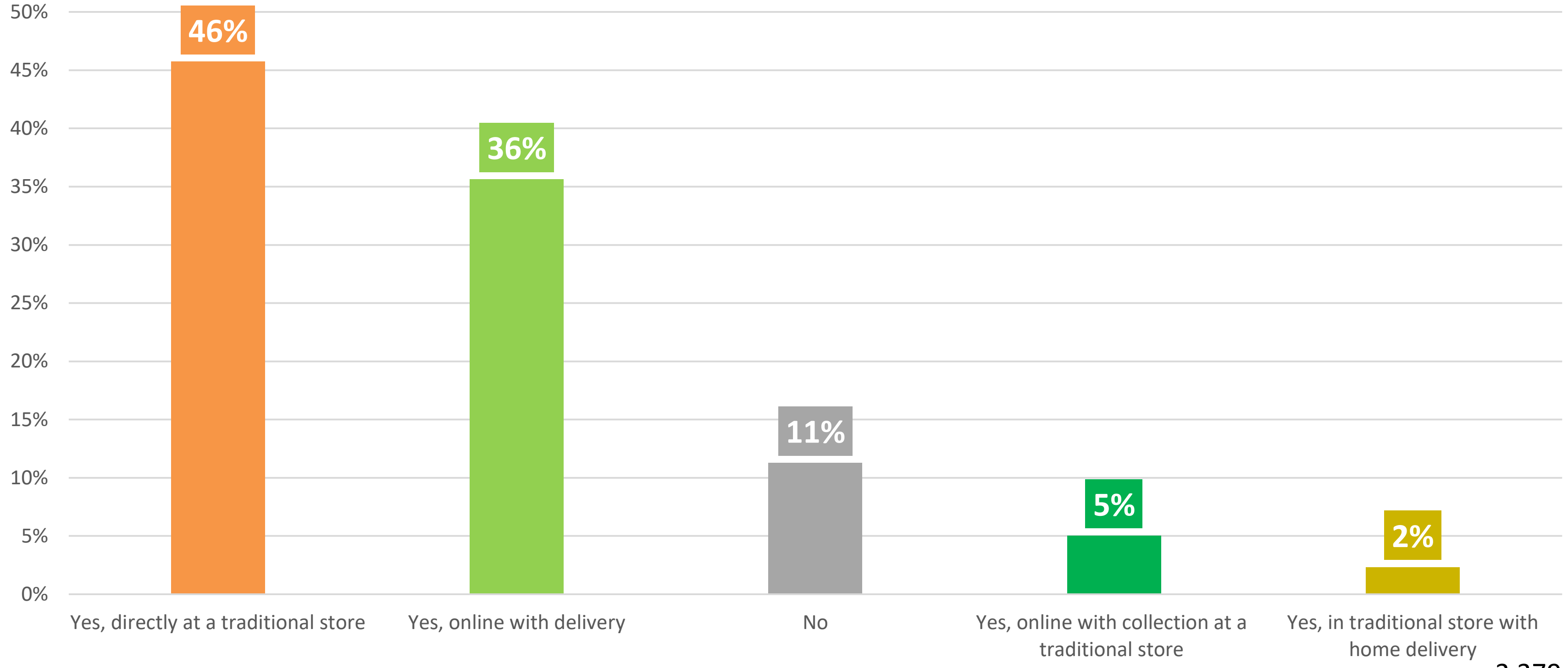
Purchase ease = **0.58**

Satisfaction = **0.66**

We note strong correlations indicating direct dependence of the willingness to recommend on satisfaction, the degree of reaching the goal and ease of purchase. This means that customers their willing to recommend brands base on their satisfaction with the purchase process and the quality of services. The chance of a brand recommendation has a large impact on further sales.

Have you recently bought clothes or shoes?

Single choice question

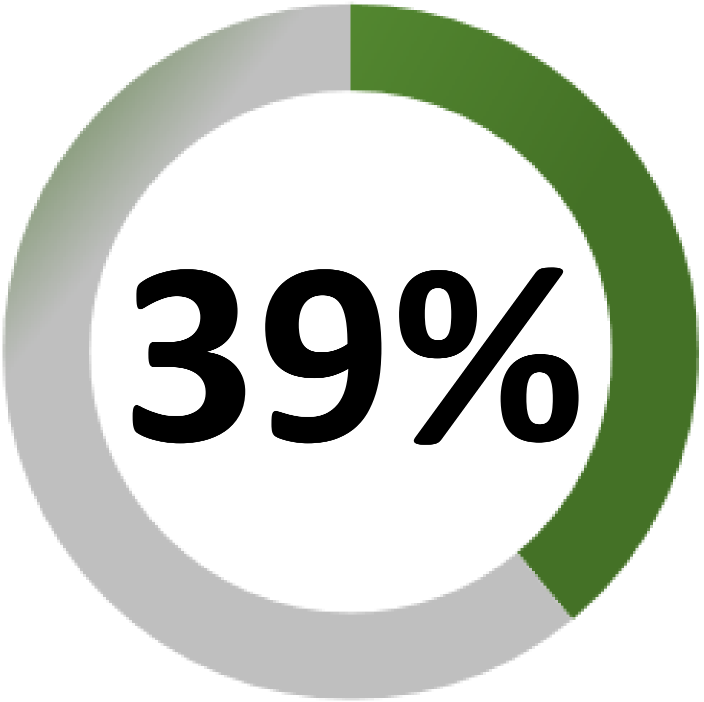


n = 3 379

Almost every second respondent recently bought clothes or shoes **directly at the traditional store**. **Online purchase with delivery** selects 36%, **online purchase with a personal collection** 5%, and **purchase at a traditional store with delivery to home** only 2% of respondents. 11% did not buy clothes nor shoes recently.

Are you looking for information online before buying clothes or shoes in a traditional store?

A single choice question



of respondents always or often looks for information online before buying at a traditional store.
We call this phenomenon the ROPO effect.

19% always, 20% often, 27% sometimes, 16% rarely, 18% never.

n = 922

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

A single choice question

8%	12%	21%	26%	33%
Always	Often	Sometimes	Rarely	Never

n = 891

What information do you seek?

People looking for information on a smartphone during a visit to a traditional store

80%
compares prices

49%
looks for reviews

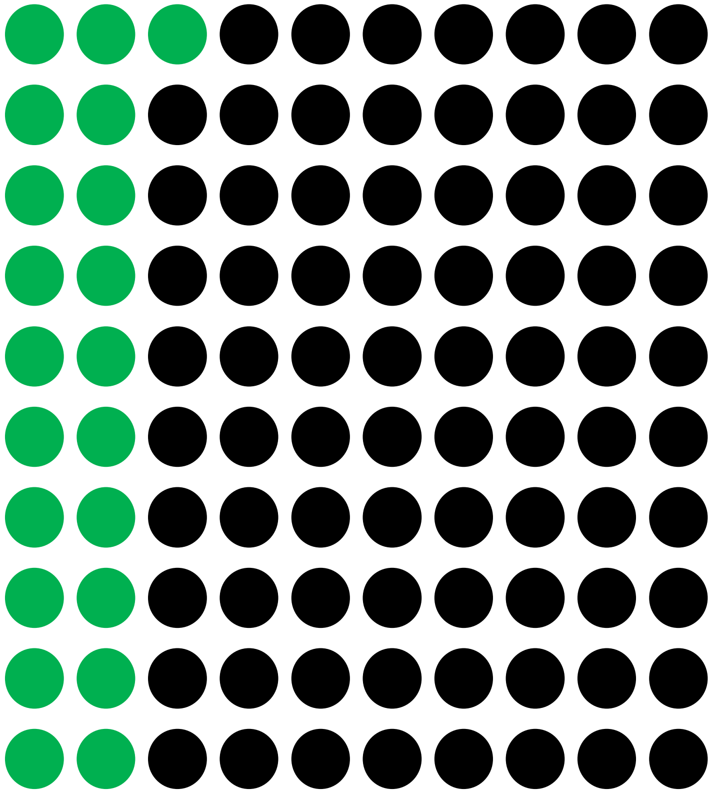
45%
checks detailed product information

27%
looks for alternatives

n = 179

Do you ask for service support when shopping at a traditional store?

A single choice question



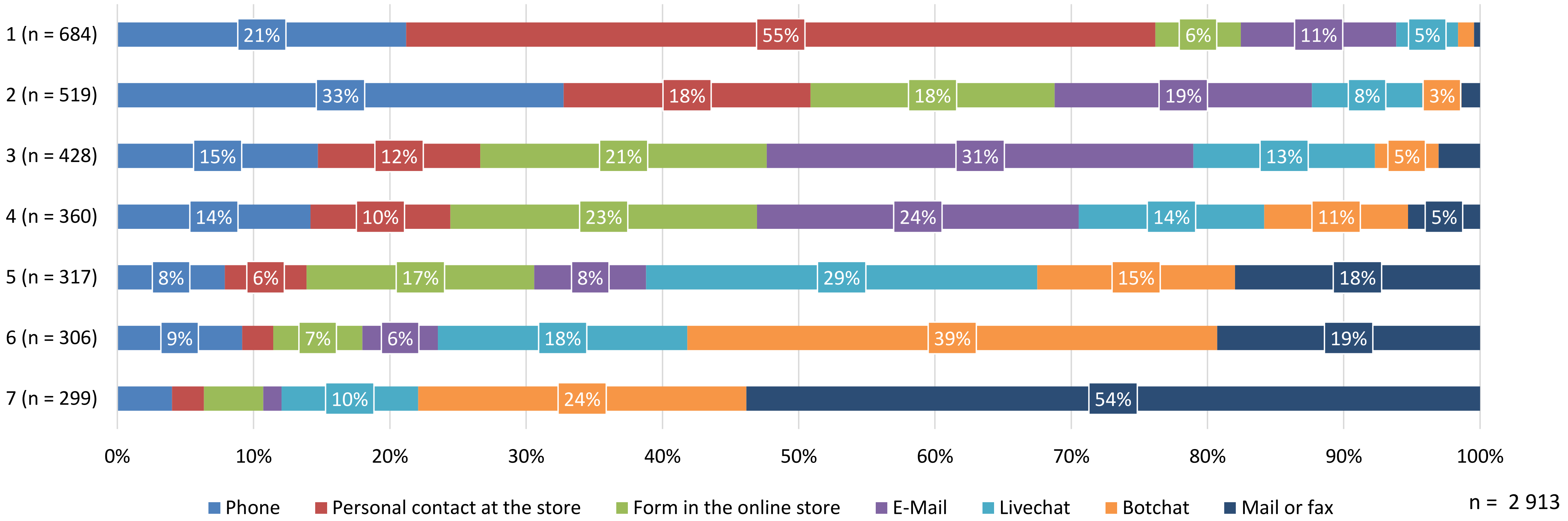
21%

of the respondents very often uses the help of the service during a visit to a traditional store. 66% do this in exceptional situations, and 13% avoids that contact.

n = 867

How would you like to contact the traditional store if necessary?

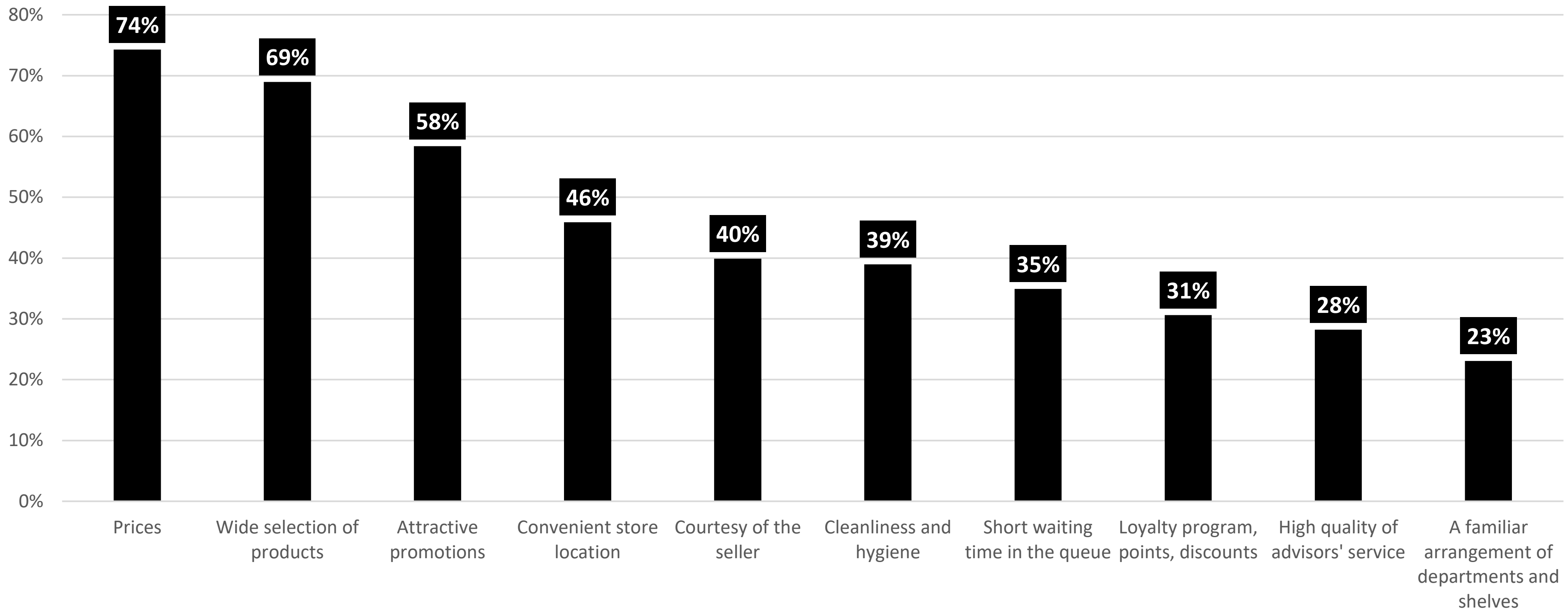
Arrange from the way you prefer the most



The respondents arranged contact channels with the traditional store starting from the one they prefer the most. The number one choice for 55% of respondents is **personal contact at the store**, 21% prefers the **telephone**, and just under 11% will select **an e-mail**. The group of channels of the second choice is dominated by **telephone contact** chosen by 33% of respondents. The **form in the online store** in the second position is chosen by 18% of the respondents. Botchat and traditional forms enjoy the least popularity.

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

A multiple choice question



n = 719

The **prices** are important for 74% of respondents, then 69% goes for a **wide range of products** as one of the most important factors. **Attractive promotions** attract 58% of respondents, a **convenient store location** is substantial for 46%. 40% of respondents will pay special attention to the **courtesy of the seller**. A **familiar layout of the store** seems to be the least important factor, although it is relevant for 23% of respondents.

If there was such a possibility, would you rate a visit to a stationary point by means of questionnaires, rating screens or face buttons?

A single choice question

51%
If they had time and desire to do so

29%
Very often, regardless of the situation

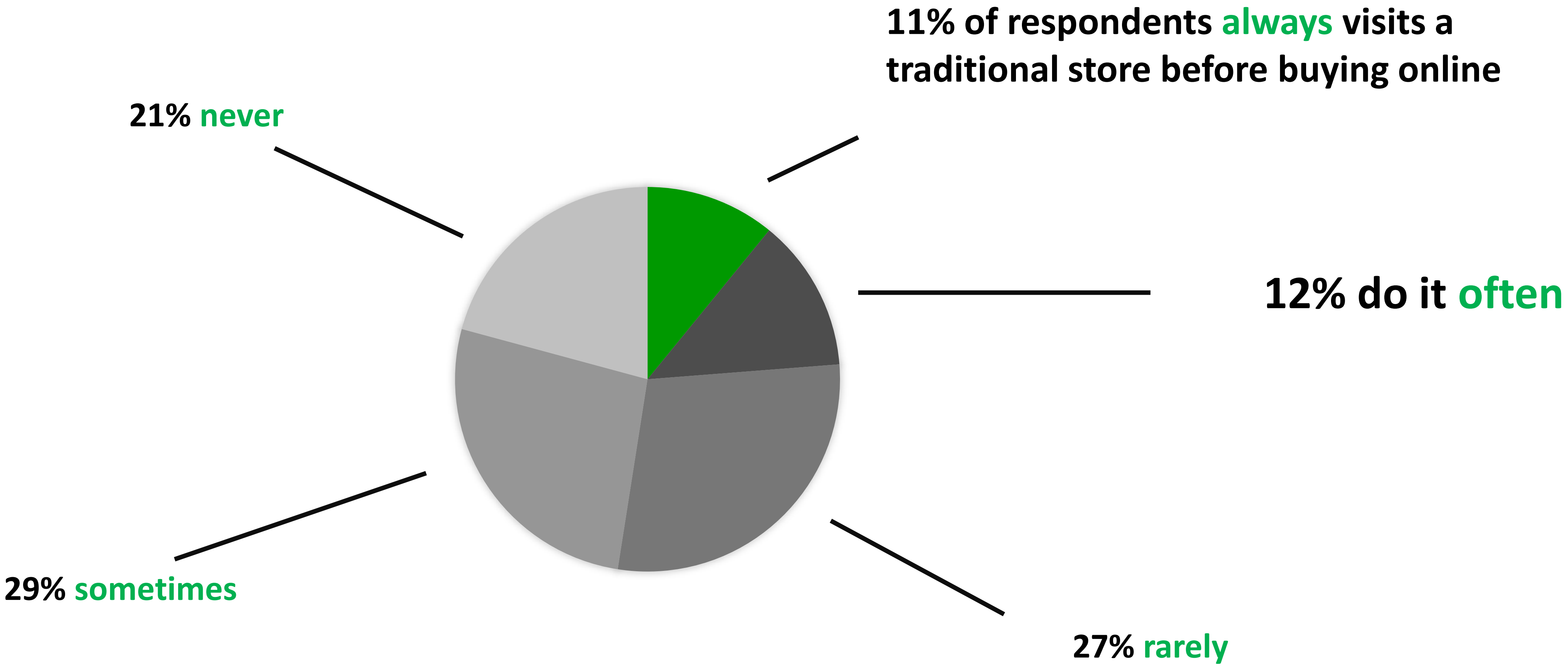
14%
They would not

6%
Will rate only in case of dissatisfaction

n = 668

Do you visit traditional stores before you buy clothes or shoes online?

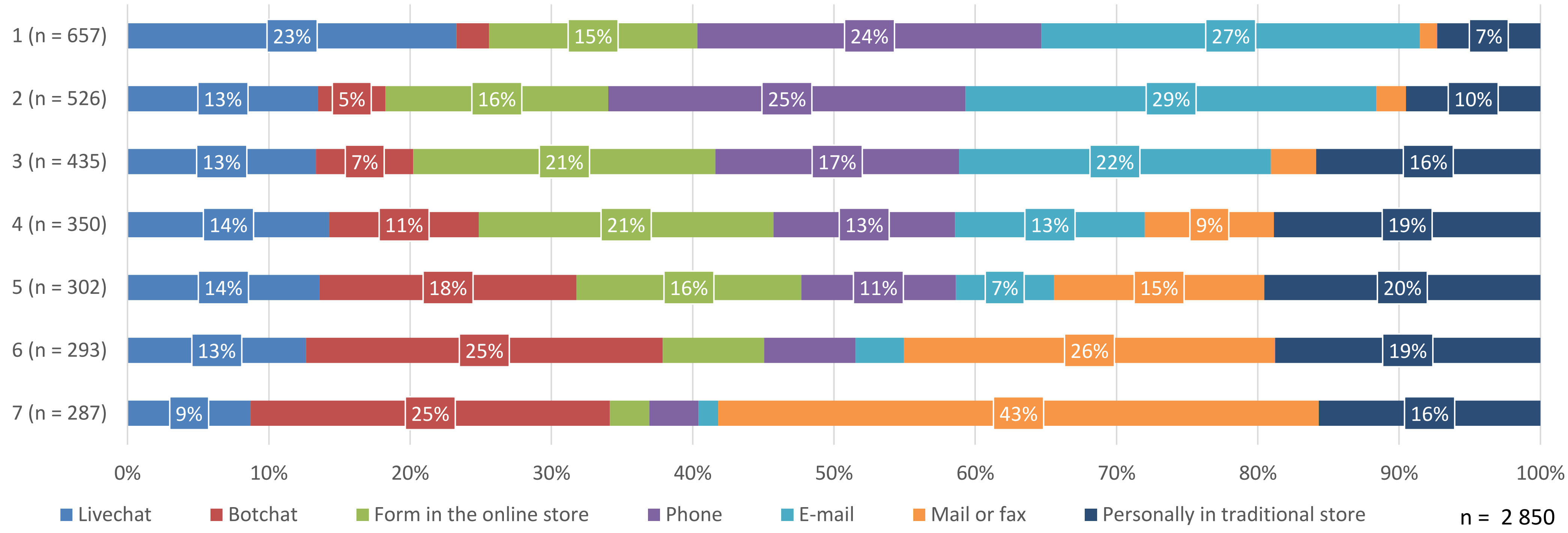
A single choice question



n = 867

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

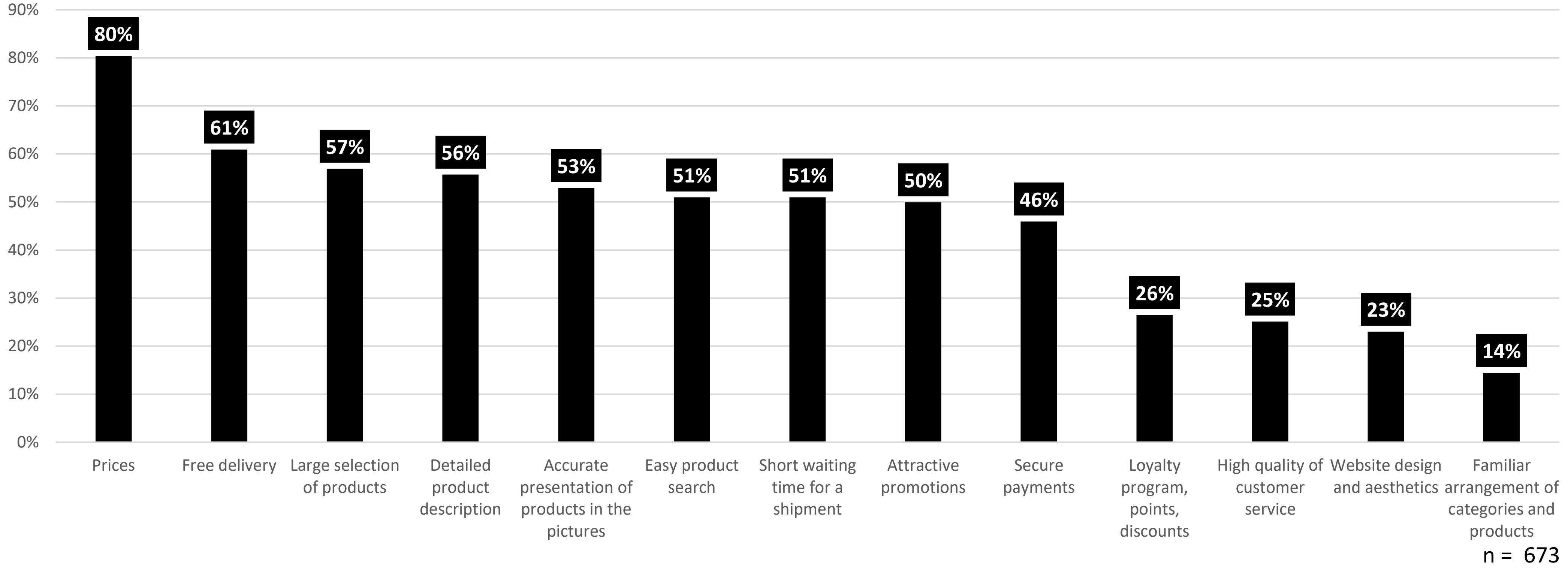
Arrange from the way you prefer the most



The respondents were scheduling the contact channels with the online stores starting with the one they prefer the most. The distribution of answers for the number one choice is very balanced: 27% will choose an **e-mail**, 24% will **talk with a consultant via Livechat**, 24% will use the **phone** and 15% **form in the online store**. The written forms and contact by botchat are by far the least popular.

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

A multiple choice question



80% of respondents declare that the **price** is the most important for them when shopping online. **Free shipment** will be appreciated by 61% of customers. **A wide selection of products** is chosen by 57%, **detailed descriptions** by 56%, and **accurate presentation of the product in the pictures** by 53%. Interestingly, the **appearance of the website** and **familiar layout of categories and products** are indicated the least often, which means that customers expect changes for the better, even if it would happen at the expense of habits.

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

Single-choice question

63%	26%	7%	4%
If they had time and desire to do so	Very often, regardless of the situation	They would not	Will rate only in case of dissatisfaction

n = 637

Omnichannel 2018

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We invite you to contact us and cooperate!

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