

Omnichannel 2018

Sports and hobbies

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

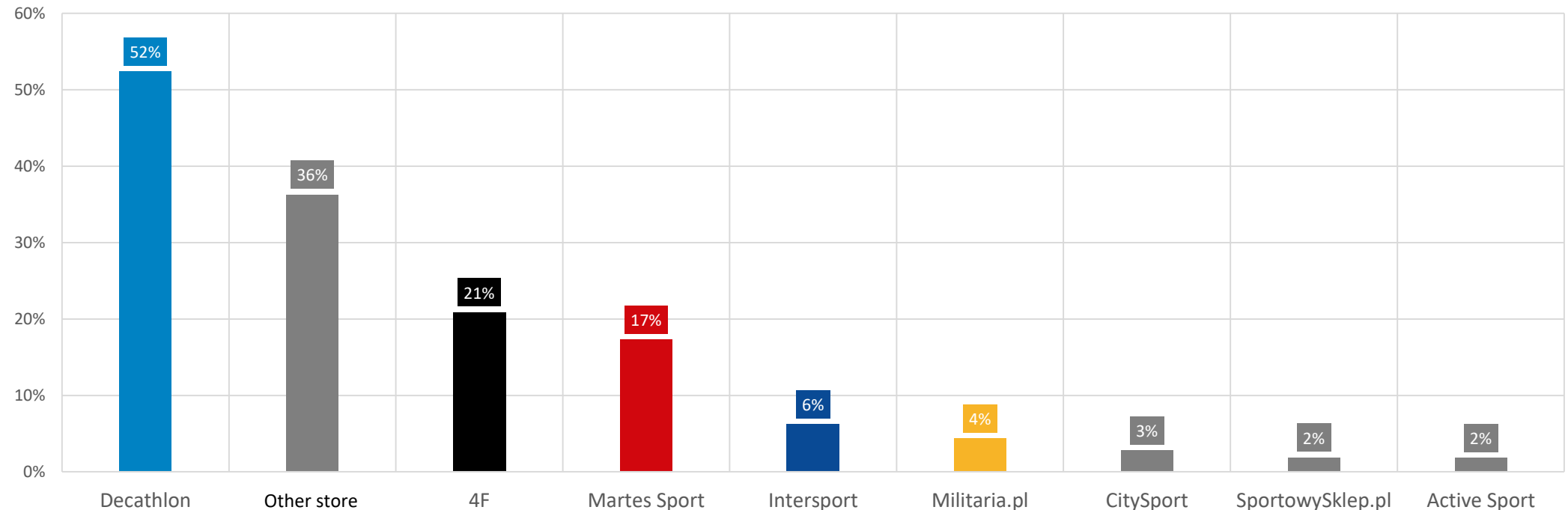


Research methodology

- 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 sports goods or hobby products?

Multiple-choice question

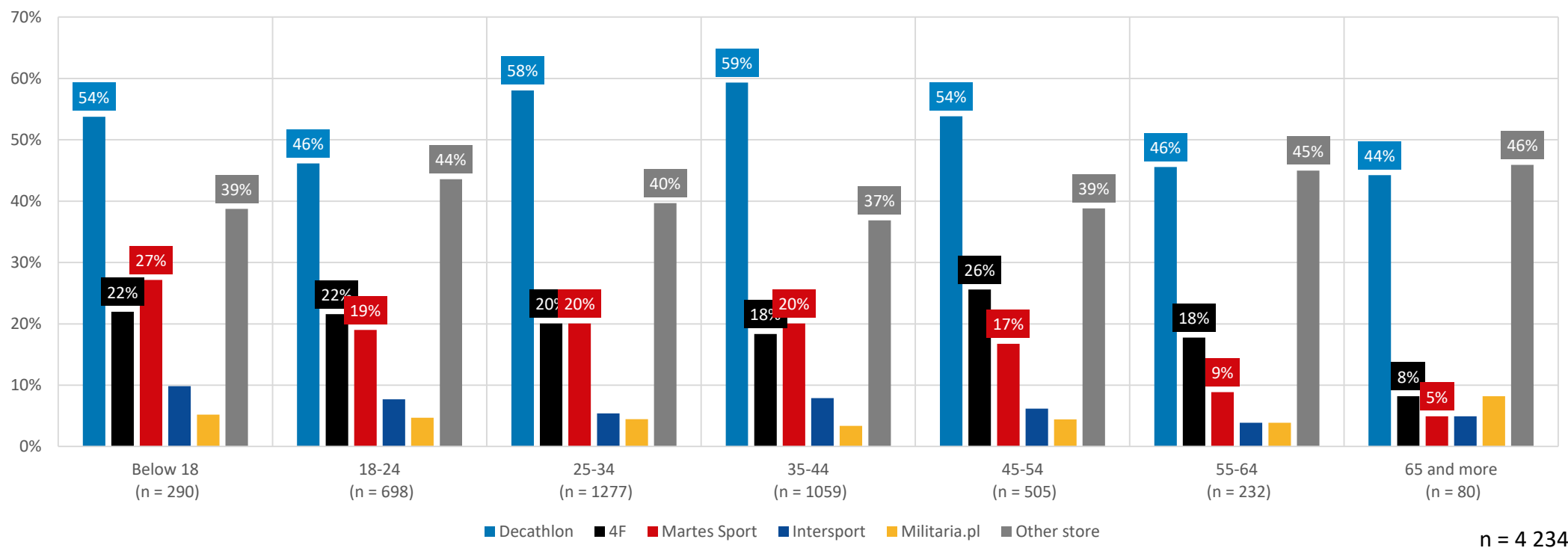


n = 4 599

Looking at the above data, it is easy to identify the leader: every second respondent buys at Decathlon stores. Next, other stores not mentioned directly are ranked second, which means that there are many popular entities on the market, which respondents associate with purchases of sports and hobby articles. 21% of respondents choose 4F, 17% Martes Sport and 6% Intersport.

In which shops do you usually buy sports goods or hobby products?

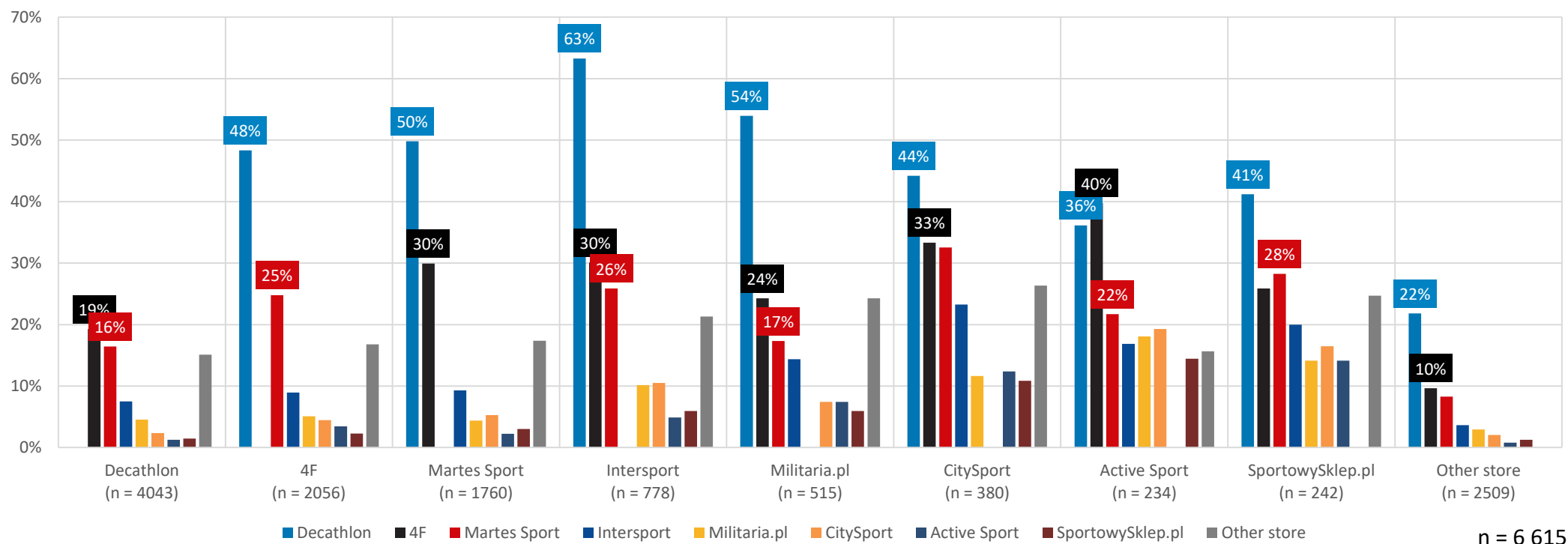
Analysis by age



Everyone, regardless of age, is convinced to shop at Decathlon. Martes Sport dominates among the youngest (27%) and its popularity decreases with age. Other stores are popular among the oldest (45% among people aged 55-64 and 46% among people over 65).

In which shops do you usually buy sports goods or hobby products?

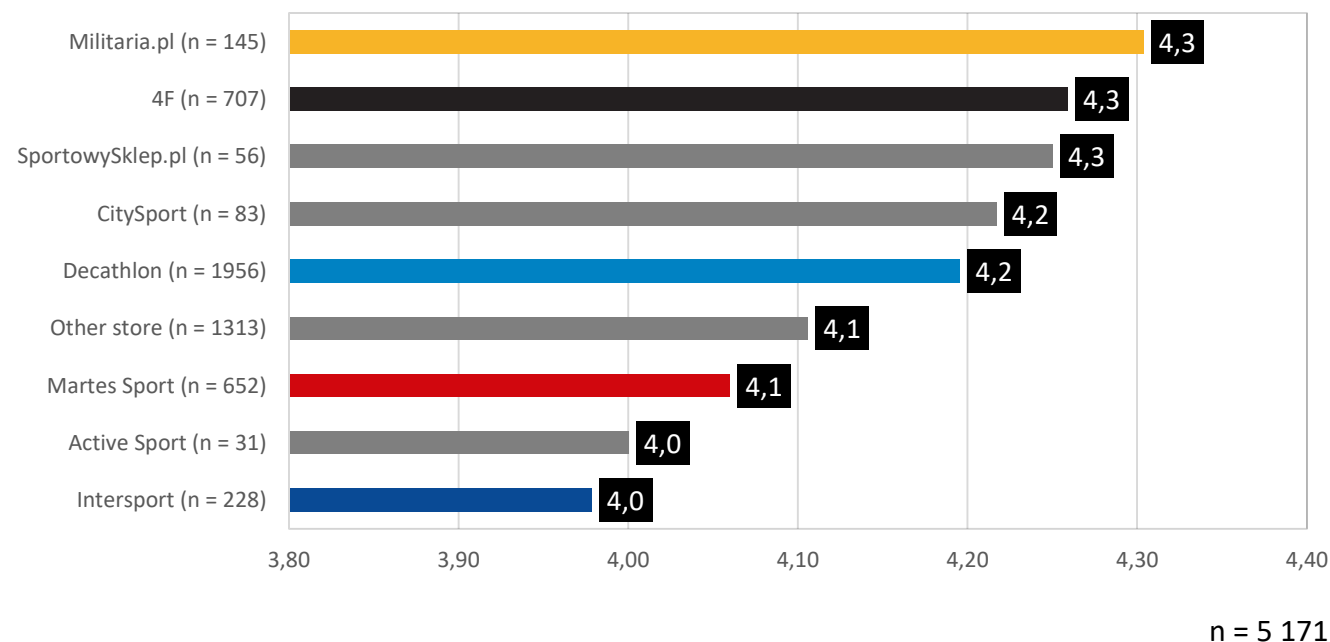
Correlations between stores



The above analysis shows where the customers of individual stores still buy. Decathlon's customers are faithful to their favourite chain and only 19% of them still buy at 4F and 16% at Martes Sport. Half of the customers of the 4F, Martes Sport, Intersport and Militaria.pl chains also buy at Decathlon. In the case of Active Sport customers, as much as 40% also buy in 4F (more than in Decathlon).

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

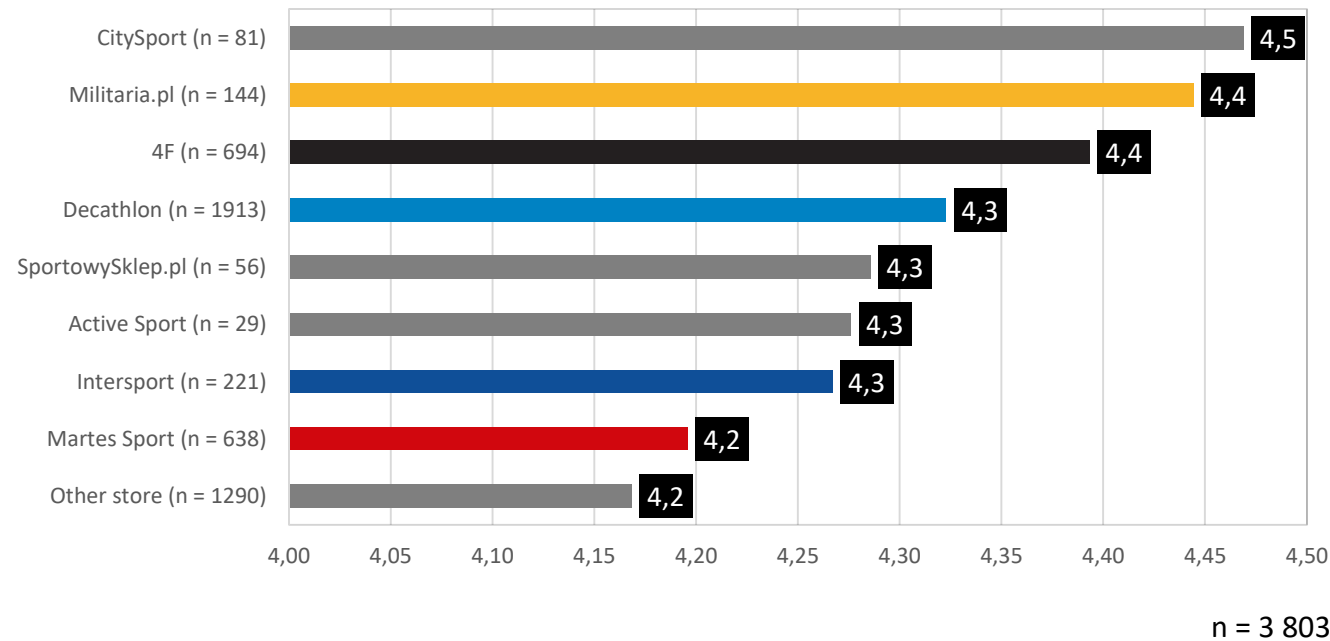
Evaluation on a scale from 1 to 5



In the sports industry, we see some of the smallest differences in the context of satisfaction with recent purchases. The difference between the leader (Militaria.pl) and the network receiving the lowest average result (Intersport) is only 0.3. This means that regular customers of these networks (and it was they who assessed their experiences first of all) share similar feelings in relation to their relations with sellers, regardless of the purchase channel.

Evaluate the ease of purchase

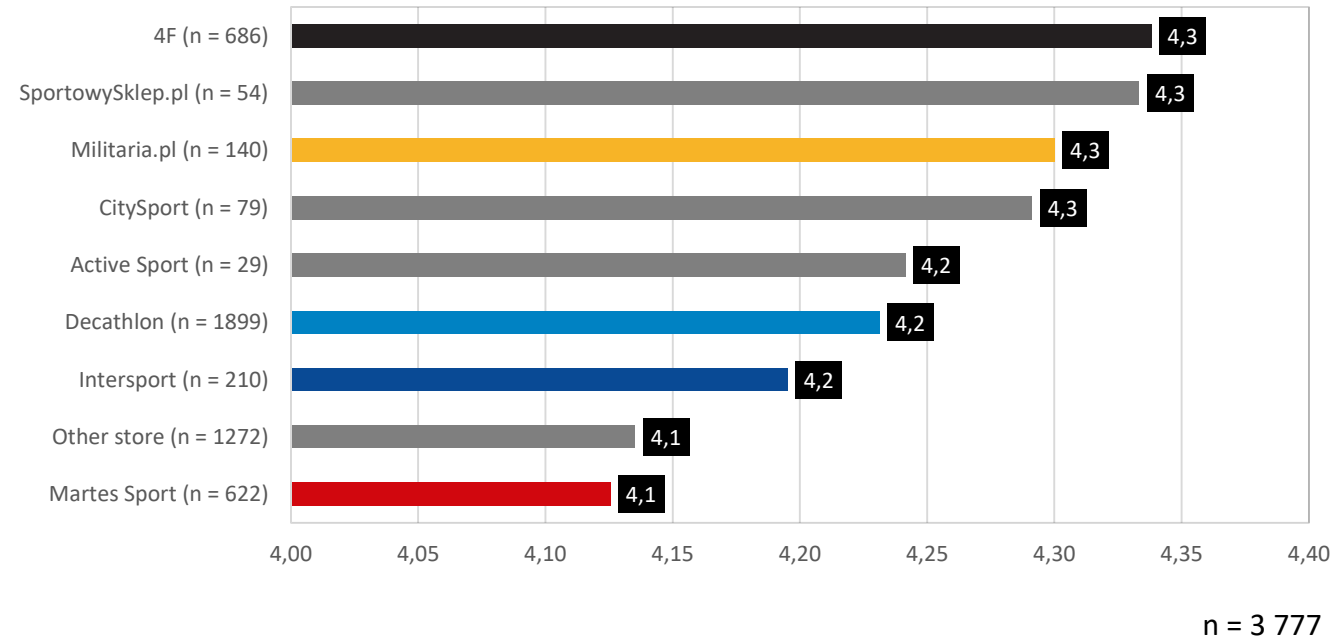
Evaluation on a scale from 1 to 5



Differences in the assessment of ease of purchase execution are similar and they amount to 0.3 between the highest and the lowest average result. The leader is CitySport, where the average is as high as 4.5, although the samples obtained for this rating are below 100 (which results from the low market share of this company, barely 3%). On the other hand, the ease of purchase is rated lowest for Martes Sport and other stores (the average there is 4.2).

Rate satisfaction with your purchase

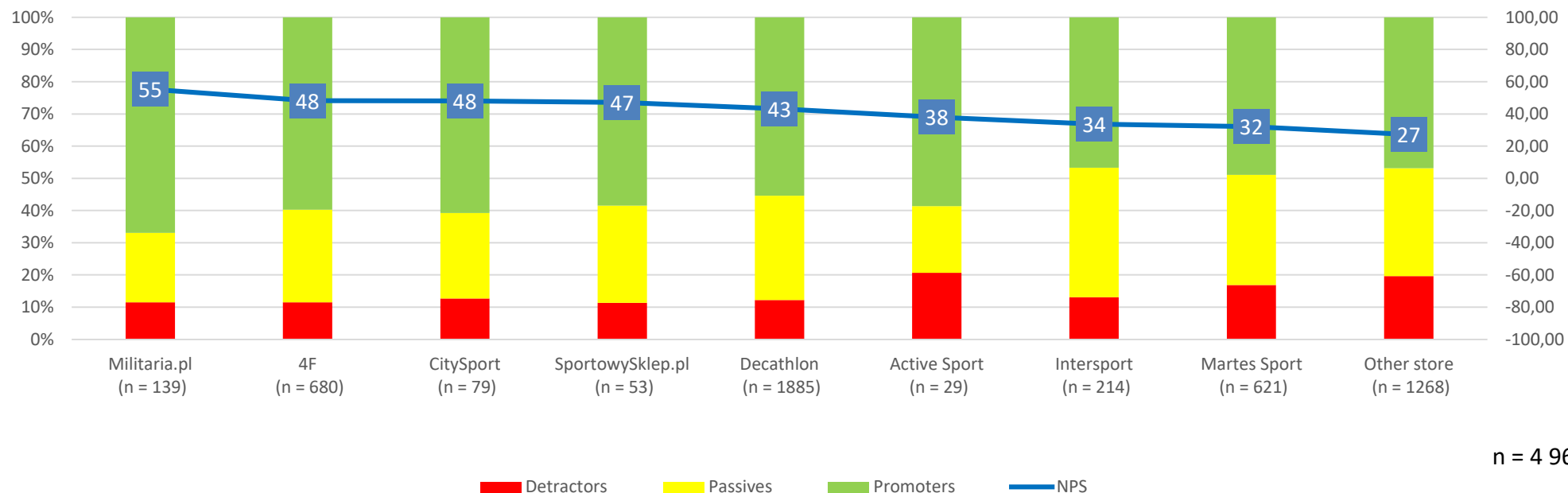
Evaluation on a scale from 1 to 5



The difference in the assessment of overall purchase satisfaction is even smaller and is 0.2 between the highest and the lowest score. The leaders are 4F, SportowySklep.pl, Militaria.pl and Active Sport with an average of 4.3. The lowest score is achieved by Martes Sport and other stores.

How likely is it that you will recommend these shops to your friends?

Net Promoter Score (NPS)



NPS indicator is a universal methodology for measuring the quality of experience based on the question of willingness to recommend services of a specific company. The leader of Omnichannel research is Militaria.pl with the NPS score of 55, where almost 70% of customers will be happy to recommend shopping in this store to their friends (Promoters). Militaria.pl also scores some of the highest satisfaction ratings in previous categories. For comparison, Martes Sport's shopping will be recommended by only one in two customers from the group of consumers who regularly shop there.

How likely is it that you will recommend these shops 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

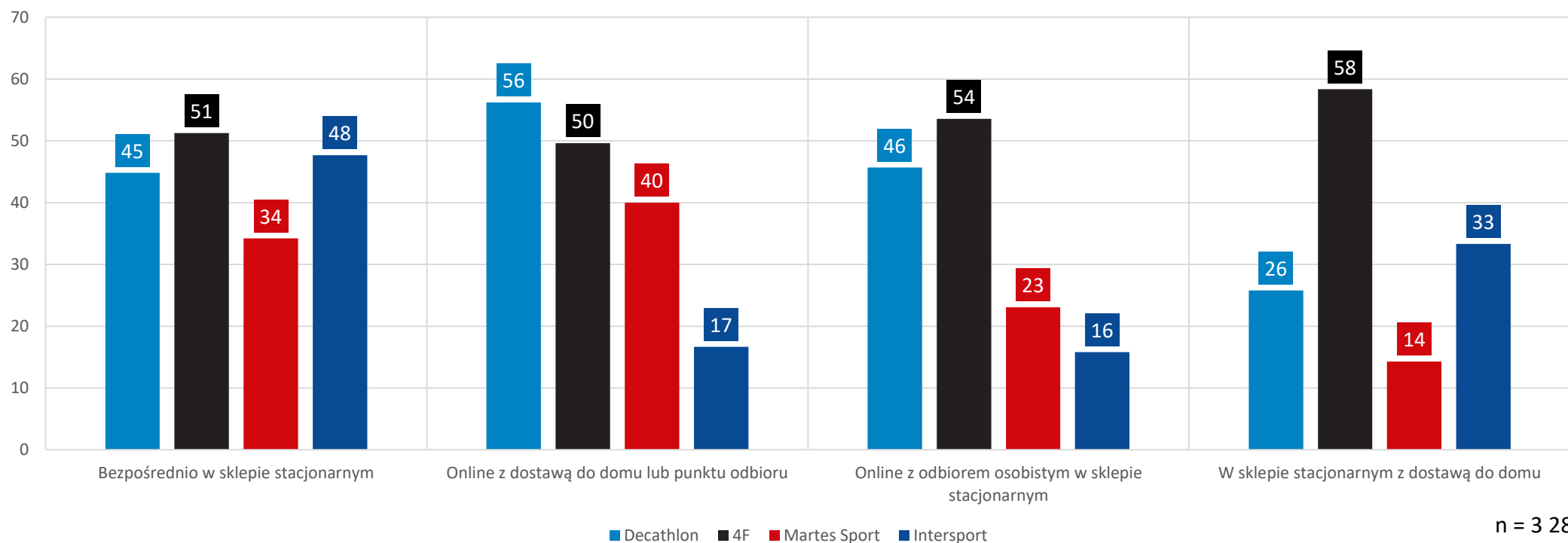
Project Manager

YourCX



How likely is it that you will recommend these shops to your friends?

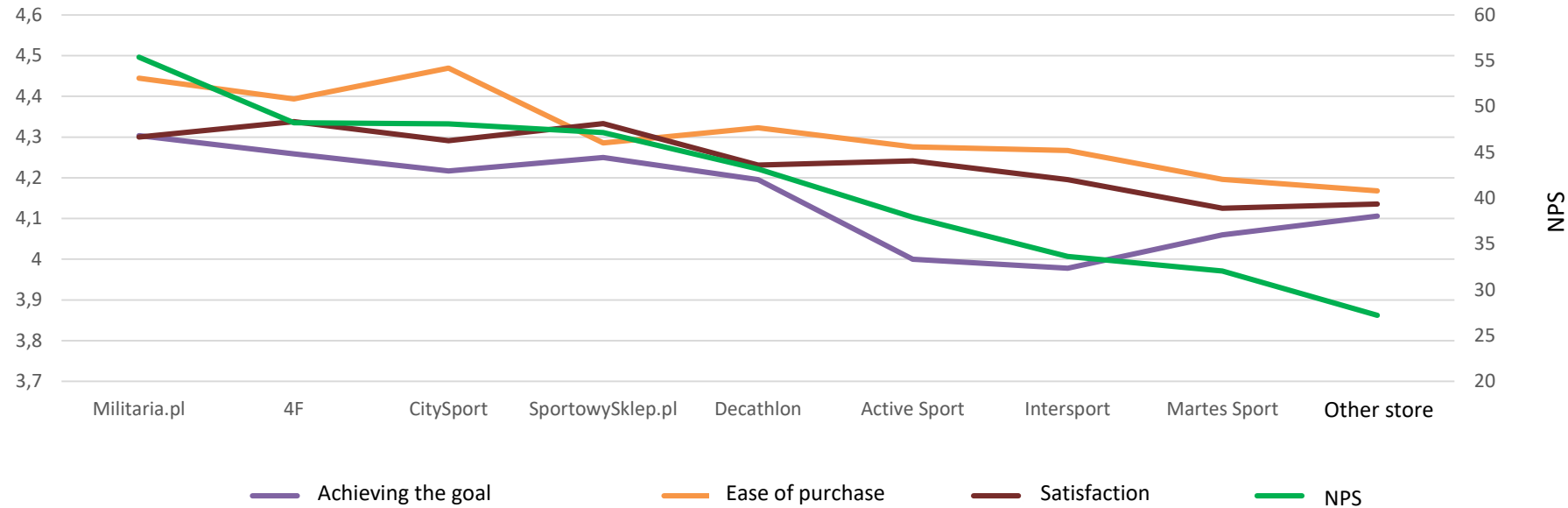
NPS by way of purchase



Analyzing the NPS ratio in the context of different purchase channels, we notice clear differences. Intersport has a very high referral rate among shoppers in a stationary shop (NPS: 48), while in the online channel this rate is much lower (17 for online home delivery and 16 for online purchases with personal collection). The quality leader in online home delivery purchases is Decathlon (NPS: 56).

Correlation analysis

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

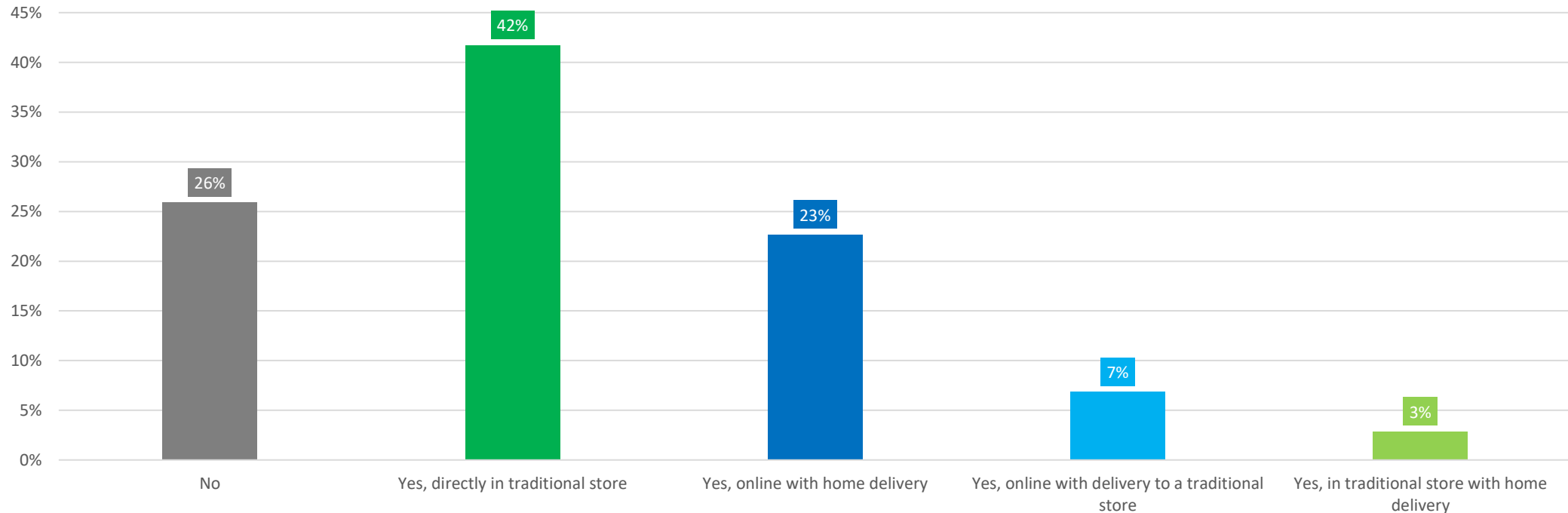


Correlations with NPS:
Achieving the goal = 0.62
Ease of purchase = 0.63
Satisfaction = 0.73

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. This means that customers strongly depend on the satisfaction with the purchase process and the quality of service to recommend the brand to their friends.

Have you recently bought sports goods or hobby products?

Single-choice question

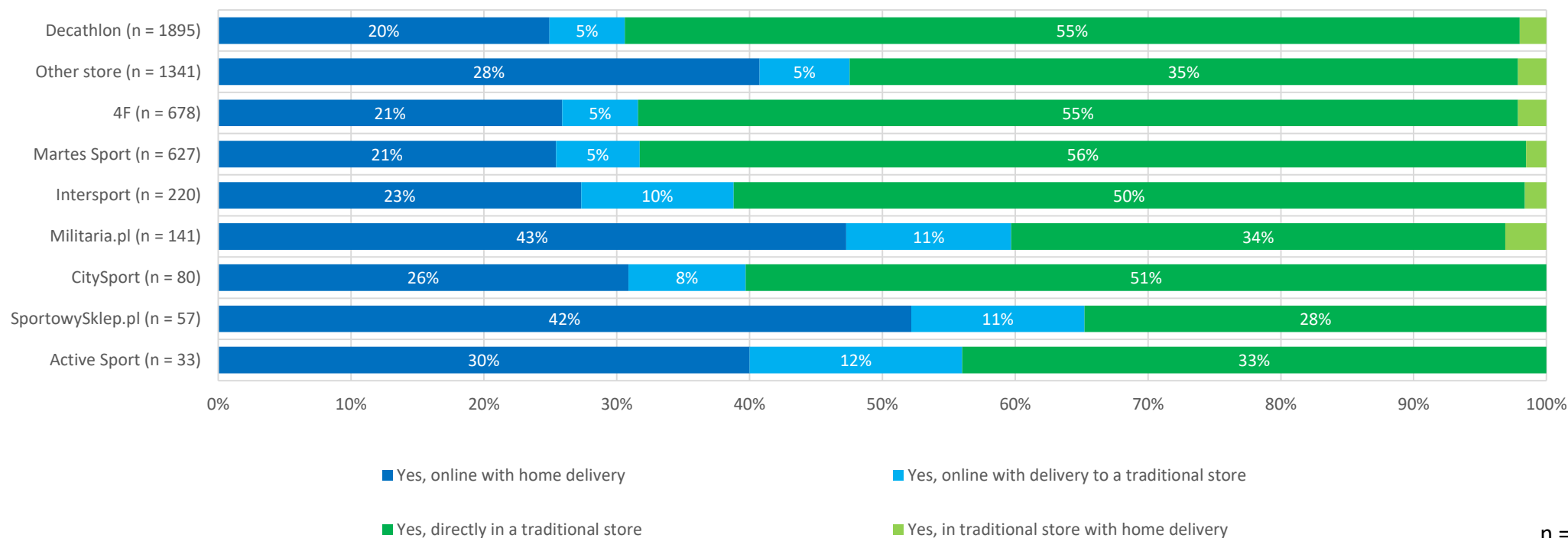


n = 4 121

42% of respondents have recently bought sports articles in traditional stores. 23% chose to buy online with delivery, 7% preferred to buy online with delivery to a traditional shop and finally only 3% bought in a traditional shop with home delivery (which mainly concerns large-size products, e.g. fitness equipment).

Have you recently bought sports goods or hobby products?

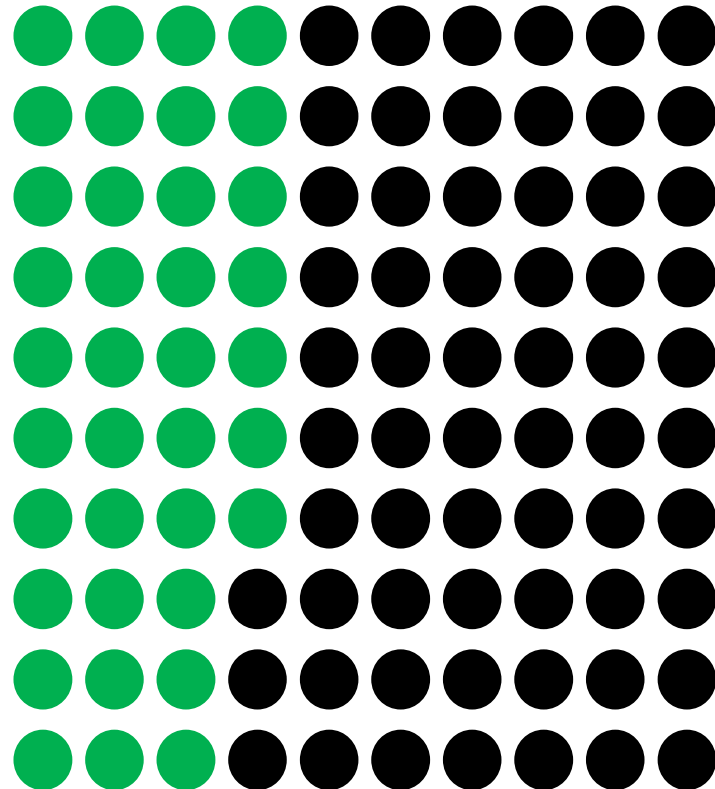
Distribution of responses by supplier



Above, there are differences in the distribution of responses concerning the purchase channel according to the shop where respondents usually buy. You can see a clear advantage in shopping in the online channel for the sellers focused on this channel like Militaria.pl and SportowySklep.pl. In Decathlon, more than half buy directly from a traditional store.

Are you looking for information on the Internet before buying sports goods or hobby products in a traditional store?

Single-choice question

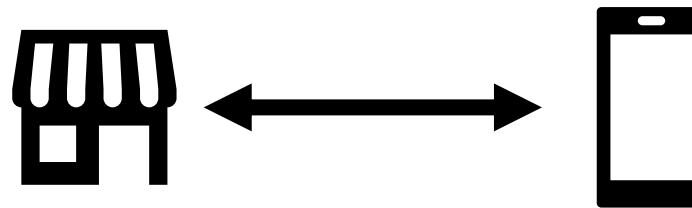


37%

searches for information online
before buying at a traditional
store. We call this the **ROPO effect**.
24% do it often, 24% sometimes,
10% rather rarely and 6% at all.

Are you looking for information about the offer on your smartphone when shopping at a landline?

Single-choice question



What information are you looking for?

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



82%

compares prices



67%

looks for a review



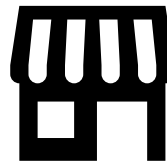
50%

**checks the
information**



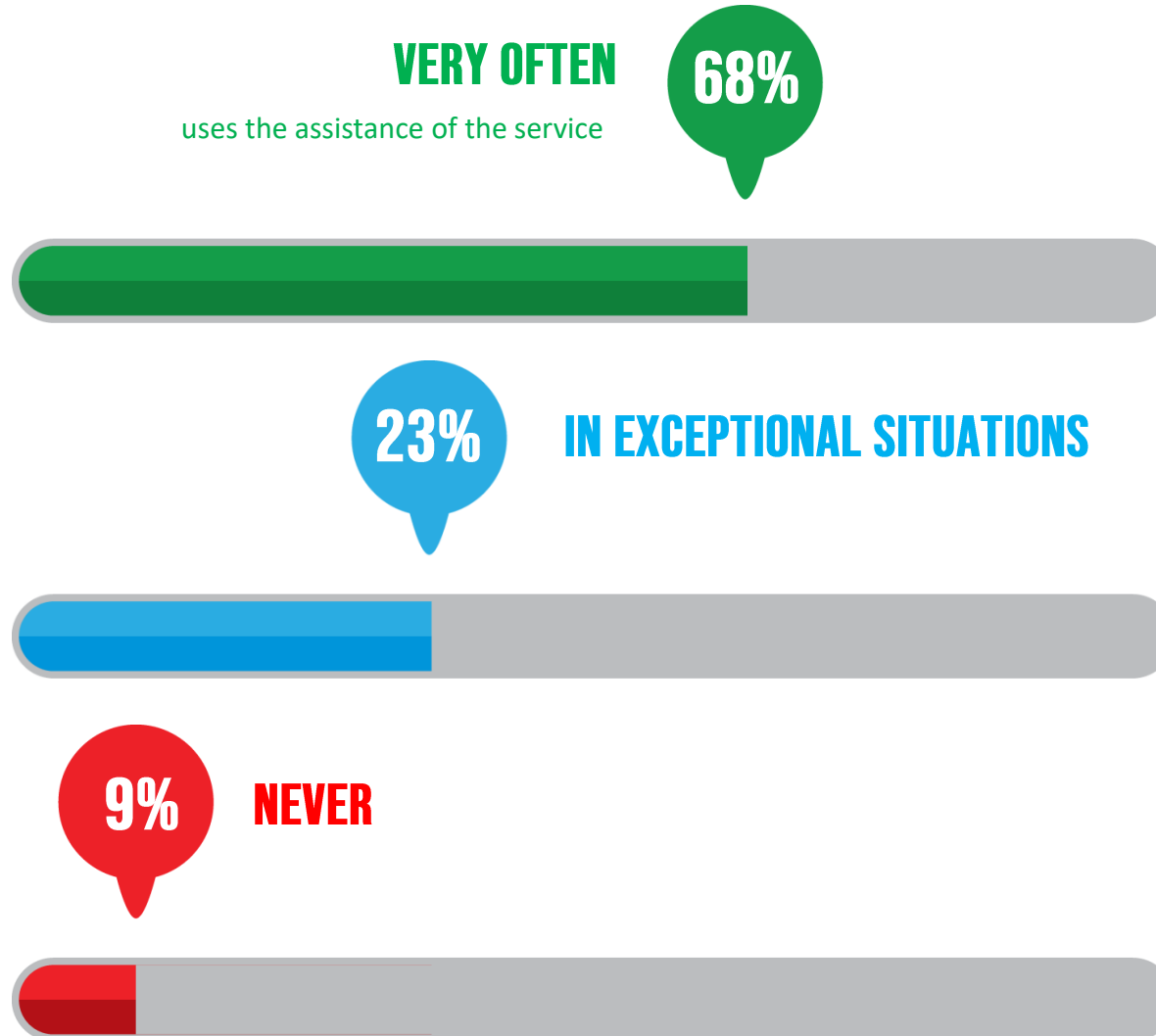
26%

**seeks alternative
options**



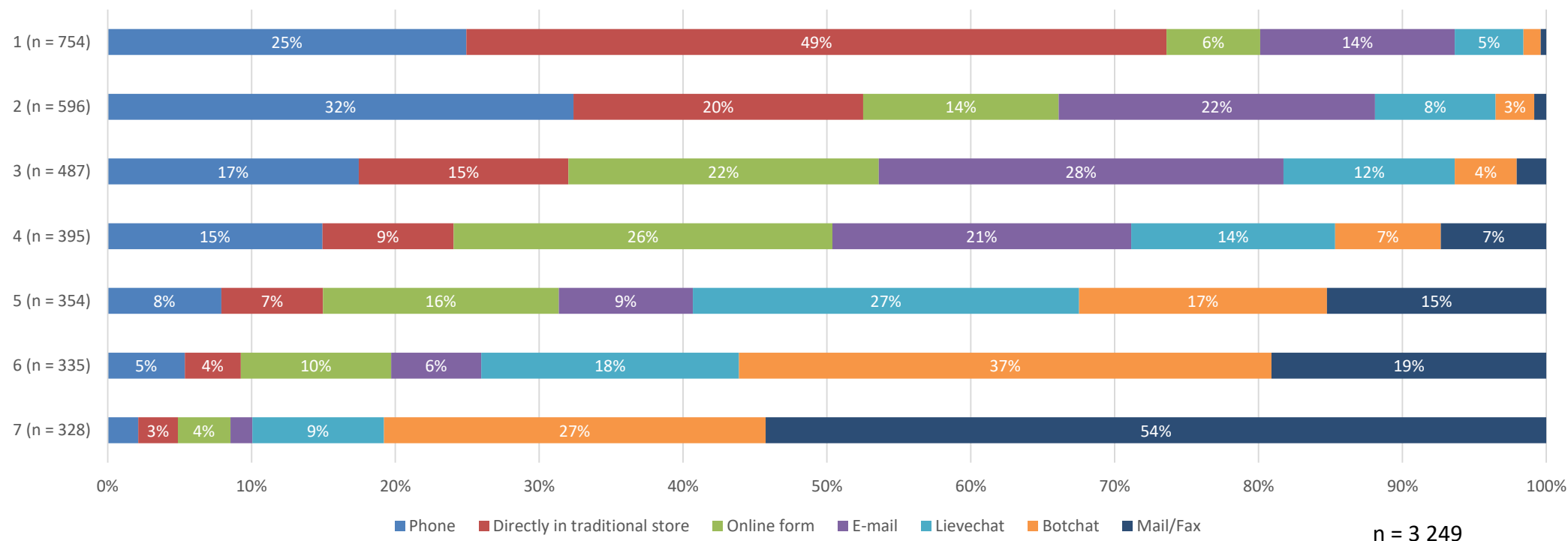
Do you use the assistance of the service staff when shopping at a traditional store?

Single-choice question



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

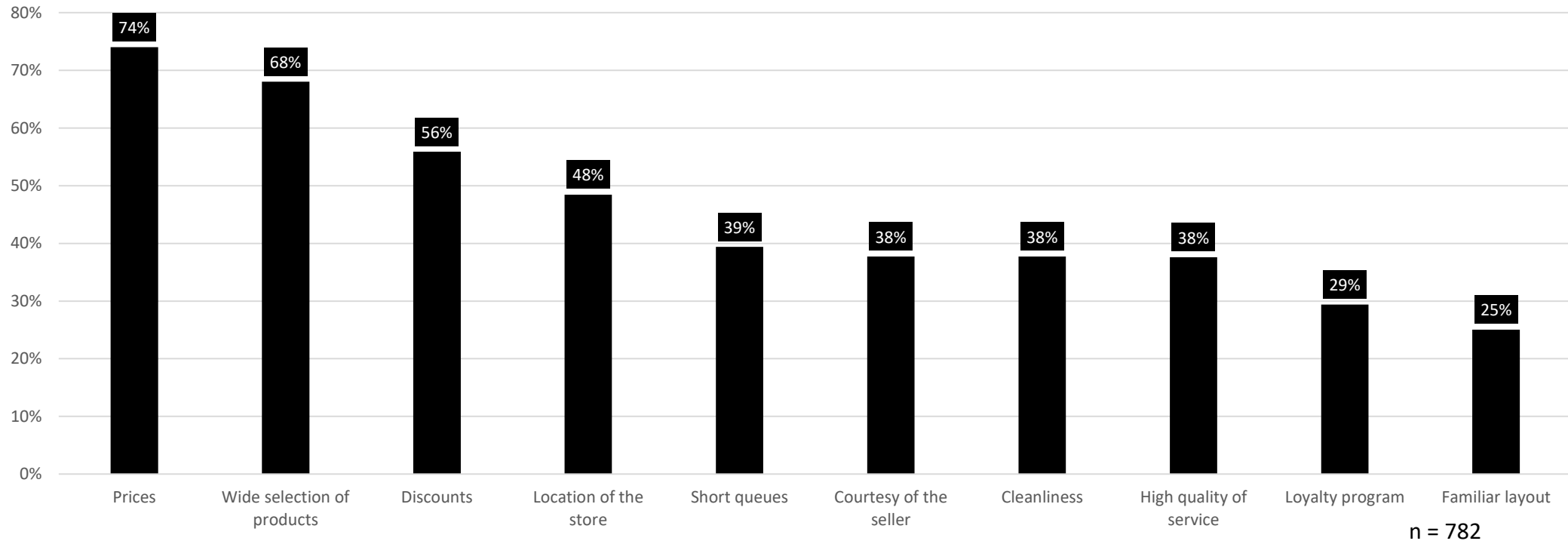
Start with the way you prefer the most



Respondents ranked the channels of contact with a traditional store, starting with the one they prefer the most. The number one choice for 49% of respondents is personal contact in the store, 25% prefer telephone and less than 14% choose e-mail. The second choice channels are dominated by telephone contact (32% of respondents). The form in the online store is chosen by 14% of respondents in the second position. Botchat and written forms are the least popular.

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

Multiple-choice question



Attractiveness of prices is an important factor for 74% of respondents. Then a wide selection of products convinces to buy 68%. For half of the respondents, the location of the store is also important. 38% will pay special attention to the courtesy of the seller, cleanliness in the shop and the quality of service of advisors.

If it were possible, would you rate your visit to a traditional store by means of surveys, evaluation screens or buttons with smileys?

Single-choice question

53%

**If they had time
and desire to do so**

29%

**Very often, regardless
of the situation**

13%

They would not

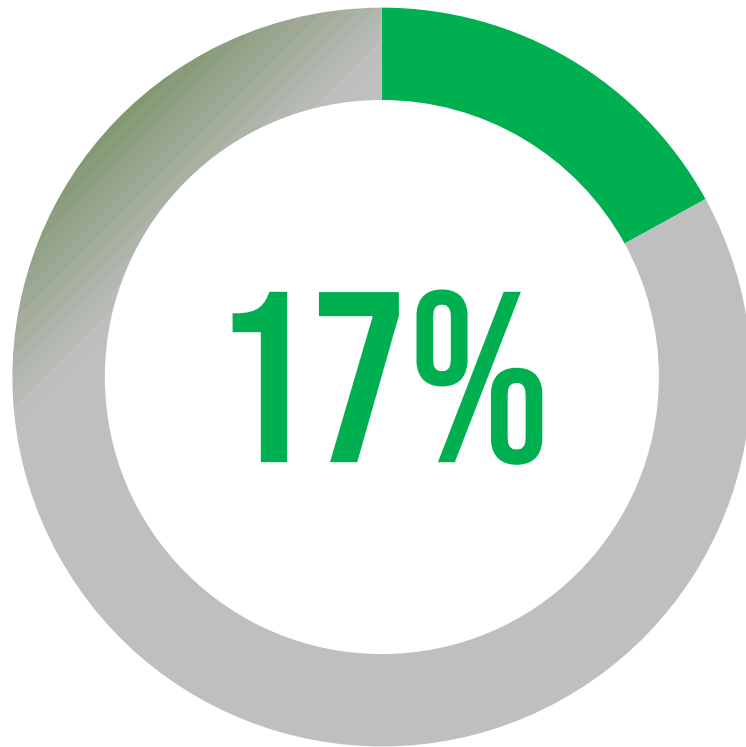
6%

**Will rate only in case
of dissatisfaction**



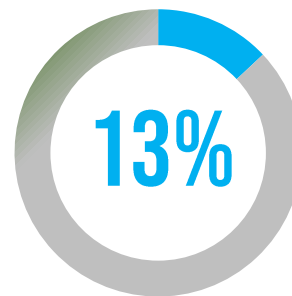
Do you visit traditional store to get acquainted with the product before buying sports goods or hobby products online?

Single-choice question

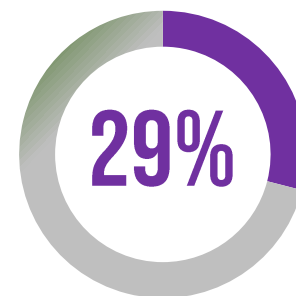


ALWAYS

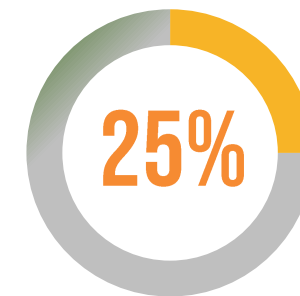
visits traditional store to get acquainted with the product before buying online.



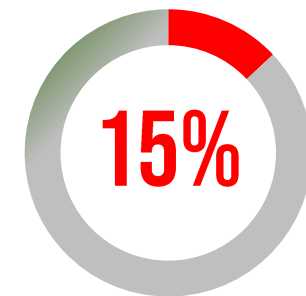
OFTEN



SOMETIMES



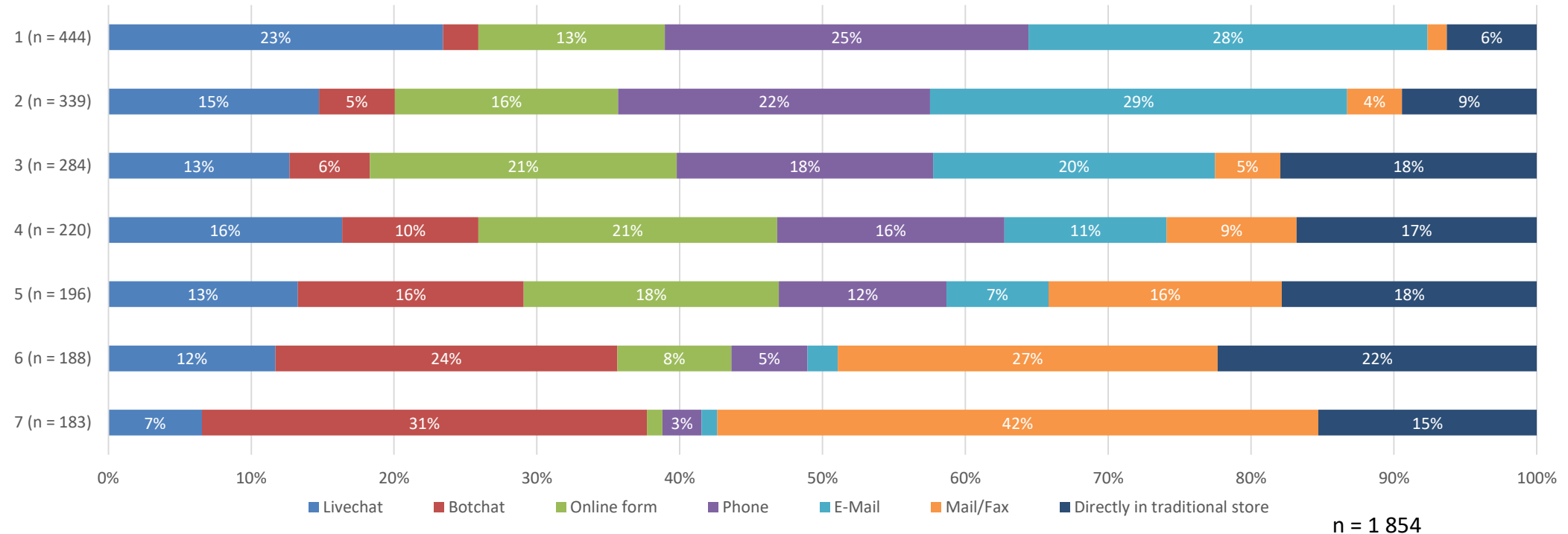
RARELY



NEVER

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

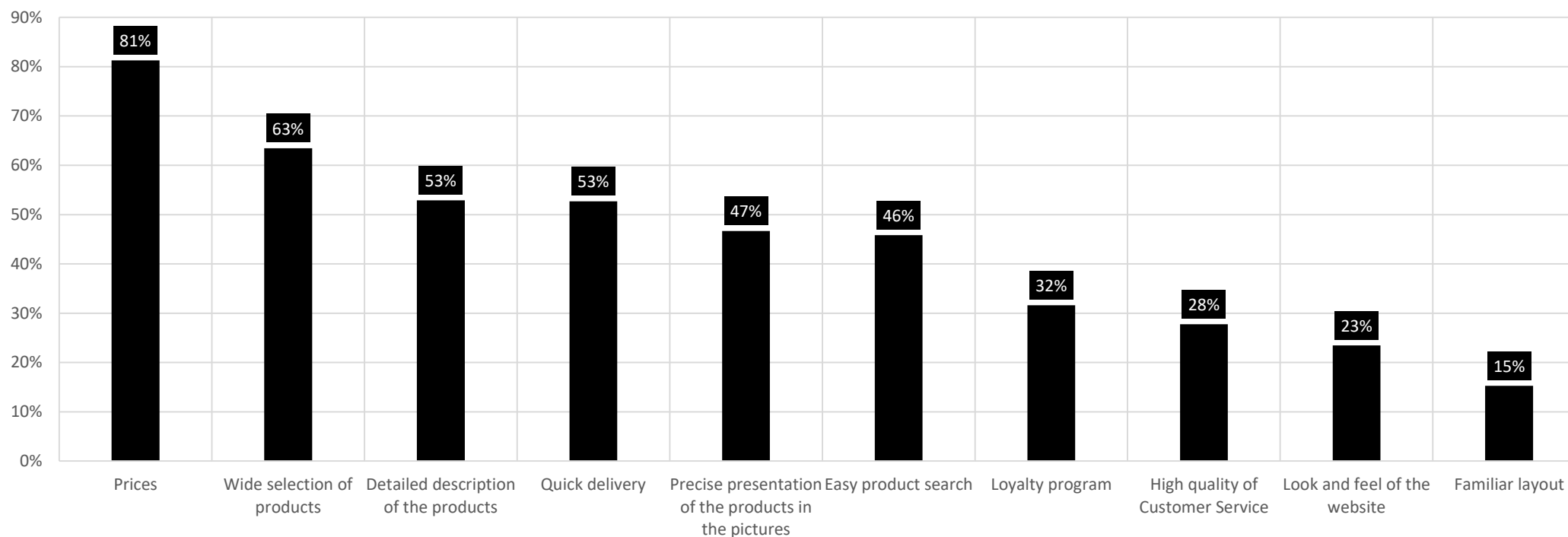
Starting with the way you prefer the most



Respondents ranked the channels of contact with the online store starting with the one they prefer the most. The number one choice for 25% of respondents is telephone contact, 23% prefer livechat and 28% choose contact by e-mail. In the group of second choice channels we can see a slight increase in the share of emails and forms in the online store. Botchat and written forms are the least popular.

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

Multiple-choice question



n = 465

The most important factor in the online store is the price, which will be compared by 81% of respondents. For more than half of the respondents a detailed description of the product is important. Familiar layout of the website is not very important for the majority of respondents, which means the Customer expects changes for the better, even if they are to take place at the expense of habits.

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

Single-choice question

59%

If they had the time
and willingness to

25%

Very often, regardless
of the situation

11%

Would not

5%

Will evaluate only in
case of dissatisfaction



Omnichannel 2018

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services**



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Drugstores



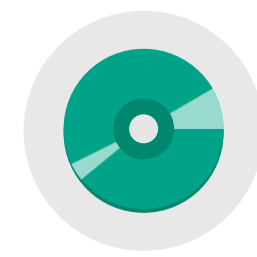
Sporting goods



House and garden



**Household
appliances**




**Books, music,
multimedia**

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

Piotr Wojnarowicz

 p.wojnarowicz@yourcx.io

 +48 661 627 620

 yourcx.io

Your**CX**

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