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PROJECT BOX

**What you need to know about
Better Omnichannel Customer Experience**

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pattern

Project BOX: Better Omnichannel Experience

What you need to know – and how to use this resource

With 93% of shoppers researching online before making a purchase in-store, it's never been more important for retailers to offer their customers a multichannel shopping experience.

We first commissioned the Project BOX research in 2017, and again in 2019, to understand what better omnichannel experiences look like in the Nordics and Benelux. However, since then, consumer demands have risen.

To see which companies have been meeting these demands, we launched Project Box 3.0. Working in partnership with the research agency, Pattern, we asked:

Are retailers in Northern Europe investing enough in creating seamless and consistent experiences across channels?
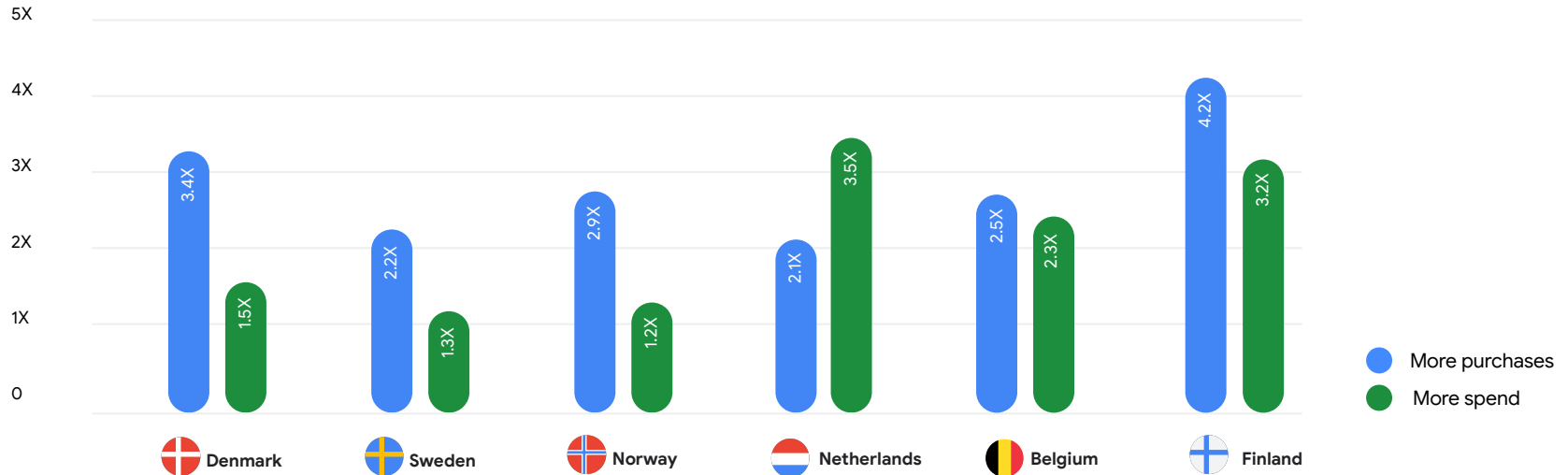
In this deck we present our findings, including a deep dive with the winners of each category, to inspire and inform your omnichannel marketing strategies.

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Market context

Across Northern Europe, omnichannel shoppers are more valuable for retailers than single-channel shoppers:

Chart (X-axis values per country):

Country	More purchases	More spend
Denmark	3.4X	1.5X
Sweden	2.2X	1.3X
Norway	2.9X	1.2X
Netherlands	2.1X	3.5X
Belgium	2.5X	2.3X
Finland	4.2X	3.2X

Legend: ● More purchases ● More spend

Y-axis: 0, 1X, 2X, 3X, 4X, 5X

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The great digital divide

Digital is the gateway to commerce both online and offline. But we're seeing a **major shift in consumer behaviour** from an omnichannel perspective. We call it the **'great digital divide'**: when retailer priorities don't necessarily match the preferences of consumers.

The graph to the right highlights just how much the priorities for consumers vs businesses differ, **illustrating the unique challenges of omnichannel.**

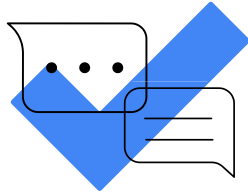|	Consumers	Businesses
Prioritising the ability to buy online, return in-store	53%	30%
Importance of a user-friendly app	77%	20%
Desire for self-checkout in-store	37%	28%
Prioritising the ability to start shopping in-store and finish online	34%	19%

● Consumers ● Businesses

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Unboxing Project Box: The methodology

We evaluated the customer experiences of Northern European retailers against a set of Customer Experience (CX) principles. Based on these scores, we established benchmarks and identified best-in-class examples of the following:
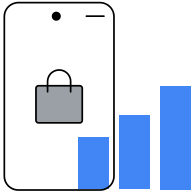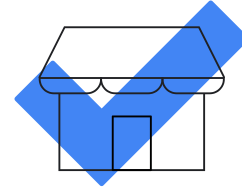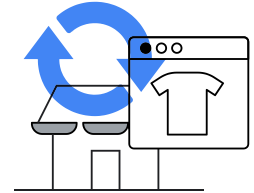
Mobile Website Evaluation	Customer Service Enquiries	Fulfilment	Store Visit & Evaluation	Actual Purchase, Click & Collect & Return to Store

What a good 5 Customer Experience Principles for a successful omnichannel experience journey looks like

Let's look at these principles more closely – with some examples to help illustrate how they can be approached. (Please note that the examples provided are not an exhaustive list)

Flexible
Gives customers a **shopping experience** that can be **adapted** and changed **based on the customer's needs**
→ e.g.: An item ordered online can be returned in-store; store staff can order in-store for delivery at home; Click and Collect is available, etc.

Unified
Connect user experience **across all online and offline channels** and customer touchpoints
→ e.g.: Loyalty programs are omnichannel; the online shop is promoted in-store, and vice versa – the store promoted online

Informative
Provides the **guidance** and **direction** a customer needs to **find the products** and information **they want**
→ e.g.: Live chat is available and able to answer questions throughout the buying journey; can filter products by store; provides expected delivery or collection day/time (either at home or in-store)

Convenient
Puts in place convenient **solutions to all customer shopping challenges** regardless of channel, behaviour and preferences
→ e.g.: On product pages: the online and offline availability of products is shown or can be requested; customer product ratings and reviews are available and/or can be entered; all available delivery or collection options for the specific product are shown

Personalised
The omnichannel experience is personalised based on the customers needs and preferences, including **personalised content and offers**. → e.g.: Email newsletters are personalised based on purchases and preferences; personalised content on website and/or app; possibility to mark your preferred (or closest) store;

The Project BOX journey

71 stores visited

2500 newsletters received

To understand how customers perceive the omnichannel experience, we created a fictitious customer persona.

Meet Jane. Jane is 30. She loves travelling, fashion, and home decor. She visited websites of 71 retailers using her mobile phone. Jane purchased products from each retailer's website, and picked them up in their physical stores. She later returned each item.

The retailers that Jane visited were spread across 6 countries: the Netherlands, Belgium, Sweden, Denmark, Finland, and Norway.
They spanned verticals including clothing, health and beauty, footwear, furniture and homeware, DIY, technology, consumer electronics, and outdoor apparel.

In the next section we'll dive into what the best practices Jane found in her omnichannel journey.

In her journey, Jane:

→ Bought and returned 71 items

→ Spent ~350 minutes on the phone with customer service

→ Received 2500 email newsletters

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01 Overall winners
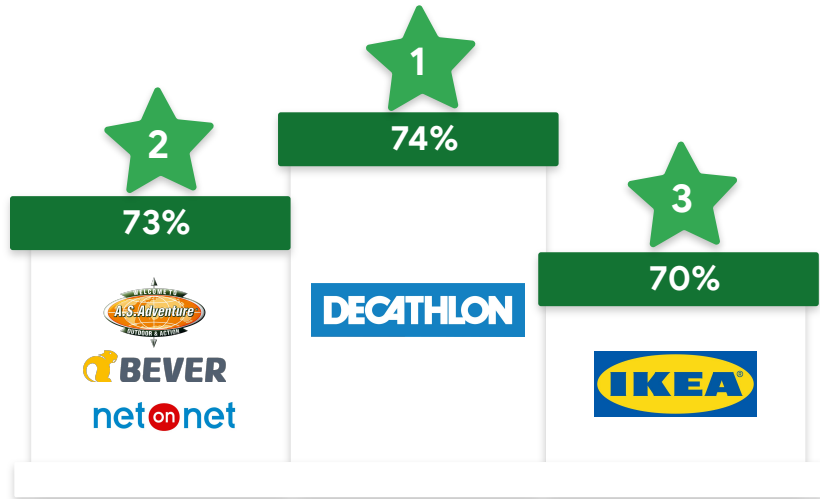
Across the Nordics and Benelux, Decathlon leads the way in their overall omnichannel experience

Bever (Belgium), A.S.Adventure (Belgium), and NetOnNet (Sweden) tied in second place, and a few points would take any one of them to the leading position.

IKEA made it to the top 3 for each Northern European market assessed.

Overall Project BOX results for omnichannel experience

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The top scorers in Northern Europe come from a range of industries

It was a tight race. Decathlon came out on top as the leading omnichannel experience, but the others are not far behind. The range of industries coming out on top shows that omnichannel is a focal point for businesses, irrespective of their vertical.

Google/Pattern, "Project Box", n=71 retailers across 9 industries (Dep. Store=7, DIY/Garden=7, Consumer Electronics=18, Fashion=14, Furniture=12, Specialities=2, Beauty=6, Sports & Outdoors=5), 2022.
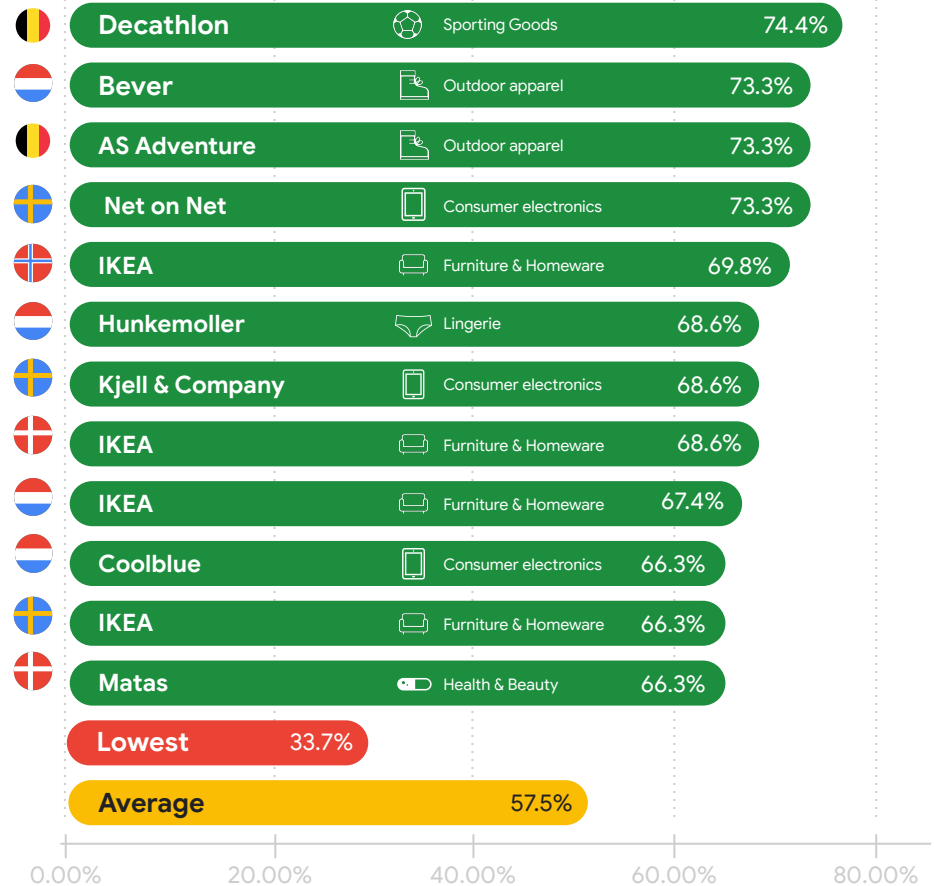
Industry findings

Retailer	Industry	Score
Decathlon	Sporting Goods	74.4%
Bever	Outdoor apparel	73.3%
AS Adventure	Outdoor apparel	73.3%
Net on Net	Consumer electronics	73.3%
IKEA	Furniture & Homeware	69.8%
Hunkemoller	Lingerie	68.6%
Kjell & Company	Consumer electronics	68.6%
IKEA	Furniture & Homeware	68.6%
IKEA	Furniture & Homeware	67.4%
Coolblue	Consumer electronics	66.3%
IKEA	Furniture & Homeware	66.3%
Matas	Health & Beauty	66.3%
Lowest		33.7%
Average		57.5%

0.00%   20.00%   40.00%   60.00%   80.00%

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02 The omnichannel experience

in Northern Europe, at a glance

Four areas where Northern Europe is leading

Since the first Project Box research in 2017, consumer demands have risen. Meanwhile, our criteria is tougher than ever before. Despite this, omnichannel scores continue to improve on the whole.

1 Click & Collect is the norm

9 out of 10 Northern European retailers offered some type of Click & Collect service, and 1 in 4 and/or offered a Reserve & Collect option.

Giving customers the possibility to choose how they collect their products on the go improves the customer experience and conversion rates (both online and offline)

2 In-store product availability is widely accessible

96% of retailers have the in-store capability for staff to check stock levels in other locations.

Customers expect and want to know where (else) / at which other store they can find the products.

3 Being able to return products in-store is the norm – and it's quick

94% of Northern European retailers allowed customers to return an item bought online to a store. This, and the speed at which returns can be made, are both above average.

Flexibility in returning to store gives customers a better experience as they don't need to wait or return their orders via online channels.

4 Gift and loyalty cards are omnichannel

79% of Northern European retailers have an omnichannel loyalty program and **83%** have omnichannel gift cards.

Omnichannel programmes give loyal shoppers exclusive offers and in turn increases conversion across channels.

Four areas where Northern Europe is falling behind

Key aspects of the omnichannel journey are still lacking for Northern European retailers compared with other markets.

1 Poorly optimised Google Business Profile listings

Just **17%** of Northern European retailers had fully optimised Google Business Profile listings.

Although nearly all retailers utilised Google Business Profile, **61%** were not fulfilling its potential capabilities.

2 Little promotion of offline activities online

Only **4%** of Northern European retailers leveraged their website to promote in-store activities.

Educating the customer on in-store events, promotions, and available services is important to encourage omnichannel shopping behaviour.

3 Unsatisfactory customer service

Across live chat, email and phone, an average of just **32%** of Northern European retailers scored **100%**.

Having sub-optimal customer service will result in reduced customer satisfaction.

4 Limited use of in-store technology

Only **30%** of retailers use in-store technology such as barcodes or beacons to allow customers to access more product information.

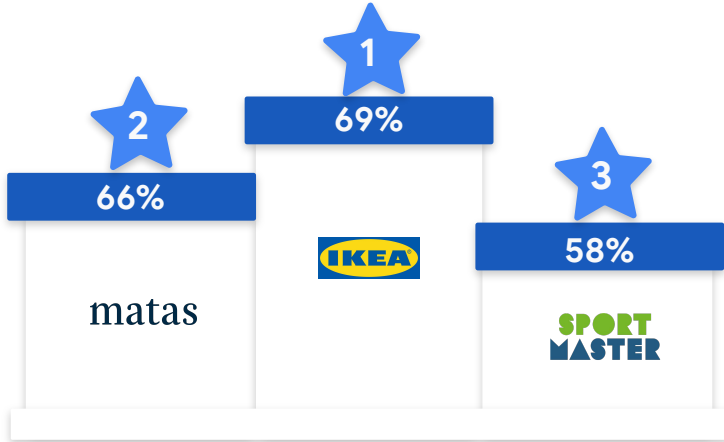Integrating QR codes and using NFC in-store helps drive initial traffic and app downloads.

Market result · Denmark

Results (out of 10 retailers)

1 — IKEA — 69%
2 — matas — 66%
3 — SPORT MASTER — 58%

Overall Project BOX results for omnichannel experience

Summary: IKEA and Matas are pulling ahead of Danish competition

Retailer	Category	Score
IKEA	Furniture & Homeware	68.60%
Matas	Health & Beauty	66.28%
Sportmaster	Sporting goods	58.14%
Magasin	Department Store	56.98%
Elgiganten	Consumer Electronics	55.81%
Lowest Score		50.00%
Average Score		56.63%

0.00%   20.00%   40.00%   60.00%

Google/Pattern, Project Box, Denmark, n=10 retailers, 2022.
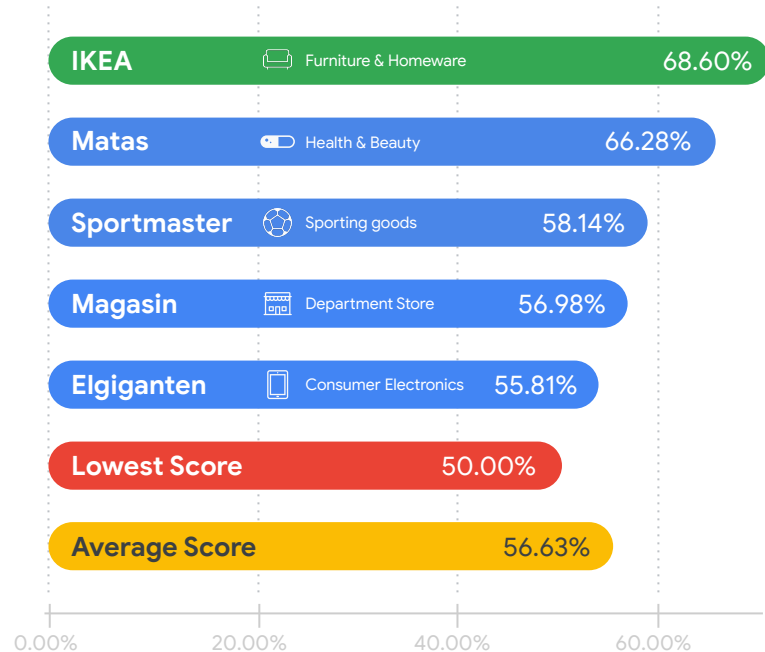
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Market result Sweden

Summary: Sweden is a competitive market, with NetOnNet pulling ahead slightly

NetOnNet	Consumer Electronics	73.26%
Kjell & Company	Consumer Electronics	68.60%
IKEA	Furniture & Homeware	66.28%
Clas Ohlson	Hardware	65.12%
Stadium	Sporting goods	65.12%
Lowest Score		53.49%
Average Score		62.98%

0.00%   20.00%   40.00%   60.00%

Results (out of 12 retailers)
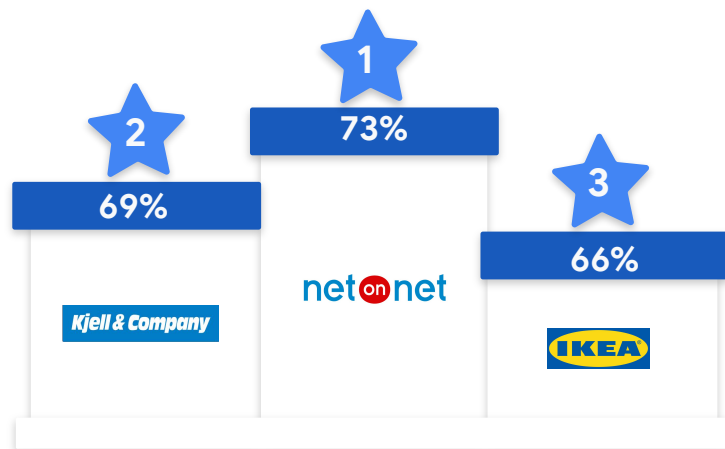
2 — 69% — Kjell & Company
1 — 73% — net on net
3 — 66% — IKEA

Overall Project BOX results for omnichannel experience

Google/Pattern, Project Box, Sweden, n=12 retailers, 2022

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Results (out of 9 retailers)

2 — 59% — POWER

1 — 70% — IKEA
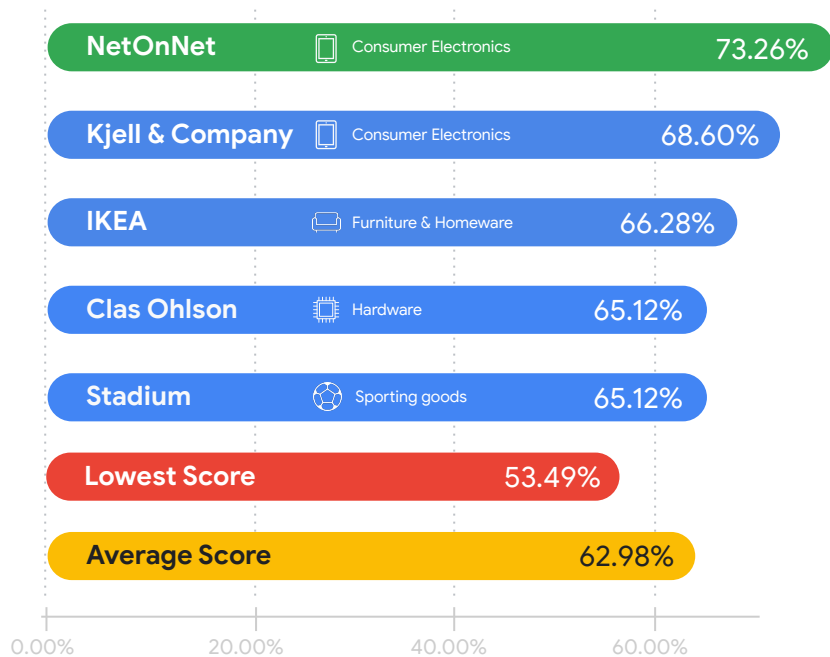
3 — 59% — XXL
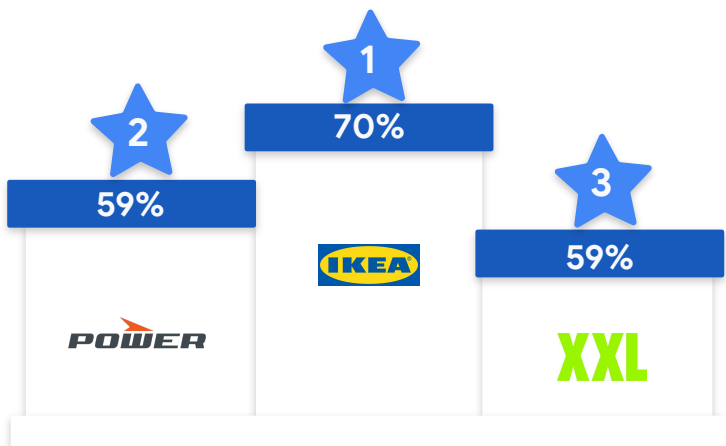
Overall Project BOX results for omnichannel experience

Summary: IKEA leap ahead of their closest competitors in the Norwegian market

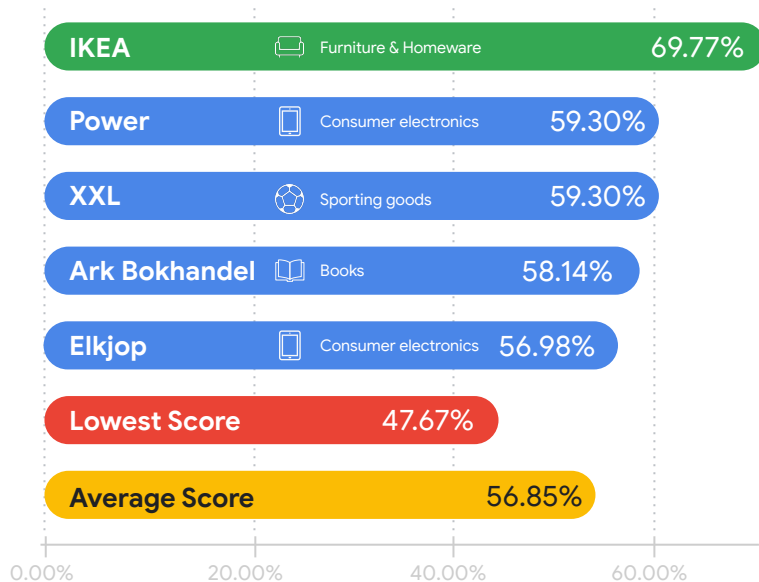| Retailer	Category	Score
IKEA	Furniture & Homeware	69.77%
Power	Consumer electronics	59.30%
XXL	Sporting goods	59.30%
Ark Bokhandel	Books	58.14%
Elkjop	Consumer electronics	56.98%
Lowest Score		47.67%
Average Score		56.85%

0.00%   20.00%   40.00%   60.00%

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Market result   Finland

Summary: Three retailers lead by a wide margin in Finland

Verkkokauppa	📱 Consumer Electronics	62.79%
Stockmann	Department store	62.79%
IKEA	Furniture & Homeware	61.63%
Lowest Score	39.53%	
Average Score	52.33%	

0.00%   20.00%   40.00%   60.00%
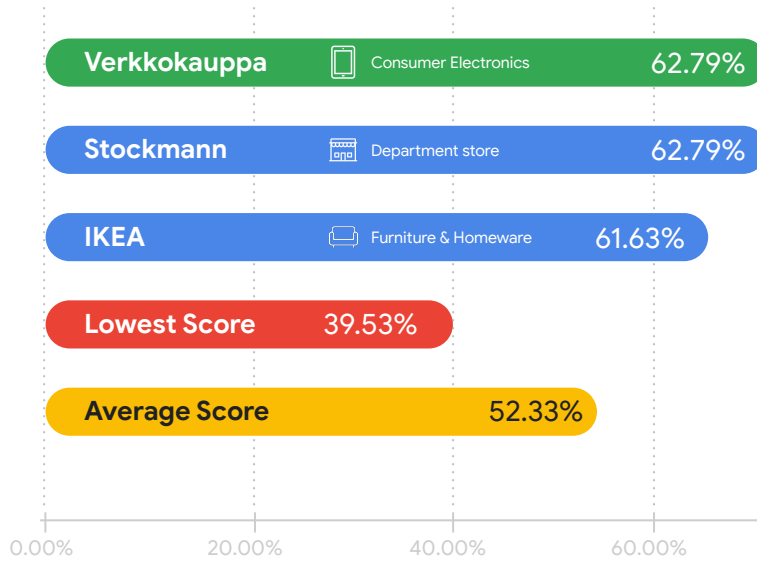
Results (out of 7 retailers)

2 — 63% — Kjell & Company
1 — 63% — net on net
3 — 62% — IKEA
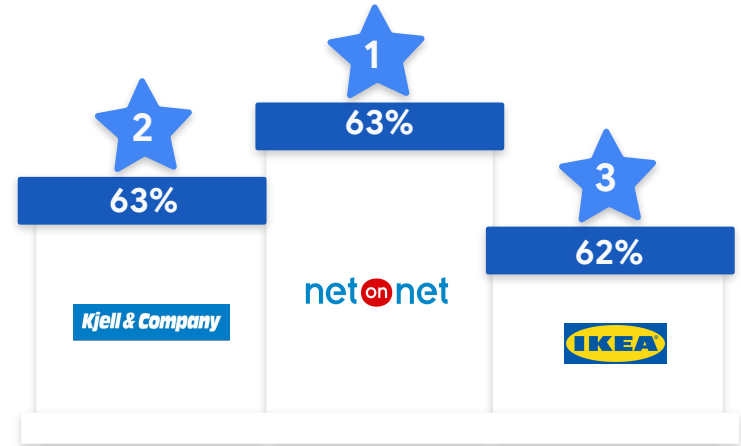
Overall Project BOX results for omnichannel experience

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Market result **Netherlands**

Results (out of 24 retailers)

Podium:
- 1st: 73% — BEVER
- 2nd: 69% — hunkemöller
- 3rd: 67% — IKEA
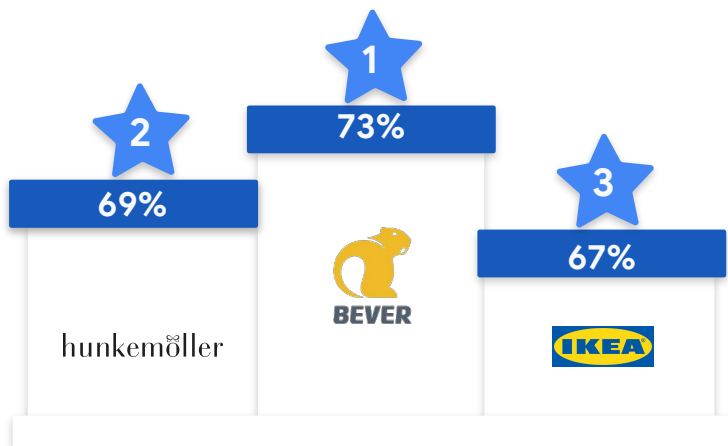
Overall Project BOX results for omnichannel experience

Summary: The Netherlands is a competitive market where Bever came out on top

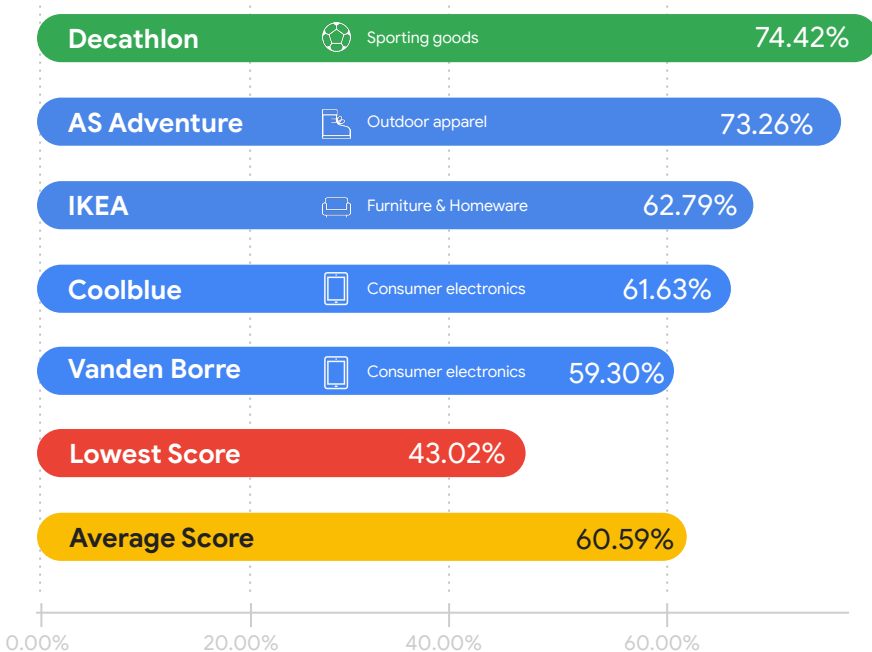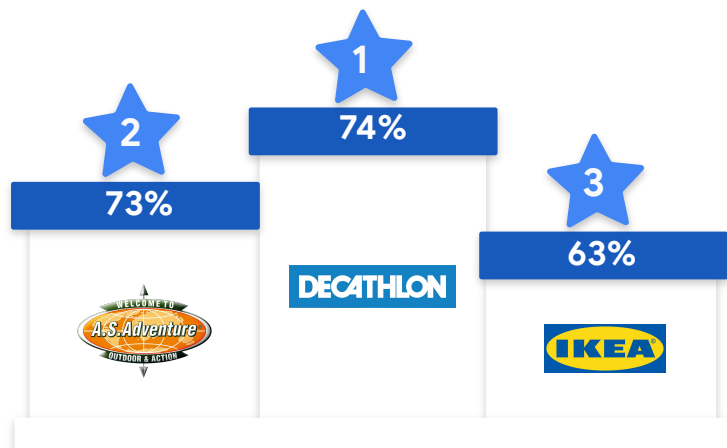| Retailer	Category	Score
Bever	Outdoor apparel	73.26%
Hunkemöller	Lingerie	68.60%
IKEA	Furniture & Homeware	67.44%
Coolblue	Consumer electronics	66.28%
HEMA	Household	65.12%
Lowest Score		33.72%
Average Score		55.52%

0.00%   20.00%   40.00%   60.00%
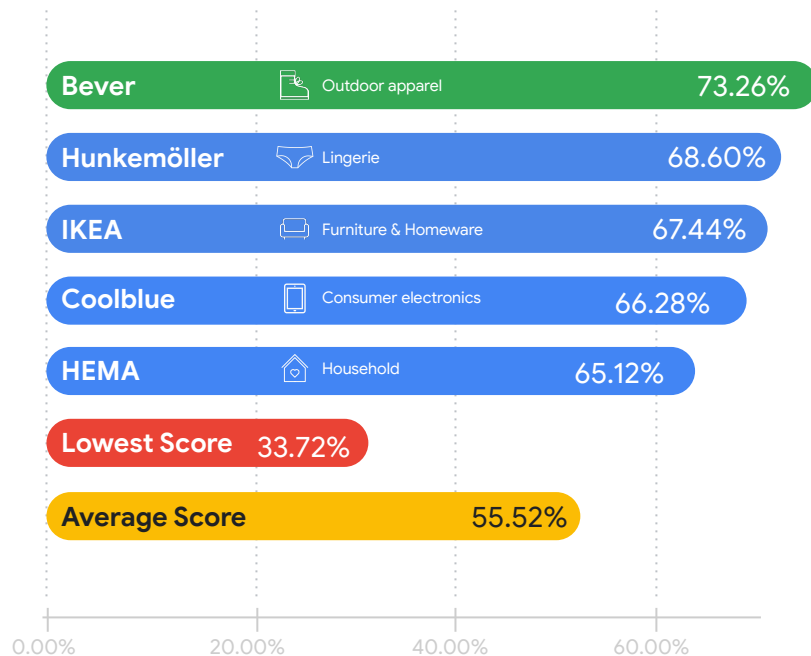
🇧🇪 Market result | Belgium

Summary: Belgium is a strong market with sports and outdoor retailers performing particularly well

Retailer	Category	Score
Decathlon	Sporting goods	74.42%
AS Adventure	Outdoor apparel	73.26%
IKEA	Furniture & Homeware	62.79%
Coolblue	Consumer electronics	61.63%
Vanden Borre	Consumer electronics	59.30%
Lowest Score		43.02%
Average Score		60.59%

0.00% 20.00% 40.00% 60.00%

Results (out of 9 retailers)

1. DECATHLON — 74%
2. A.S. Adventure — 73%
3. IKEA — 63%

Overall Project BOX results for omnichannel experience

04 Lessons from the winning retailers

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Winning retailers per category

Overall Experience
DECATHLON

Most Flexible Experience
matas

Most Unified Experience
IKEA®

Most Informative Experience
WELCOME TO A.S.Adventure OUTDOOR & ACTION   BEVER

Most Convenient Experience
net on net

Most Personalised Experience
DECATHLON

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DECATHLON

What makes Decathlon #1 in Northern Europe?

Decathlon consistently delivered an excellent customer experience across all channels and markets in which they were reviewed.
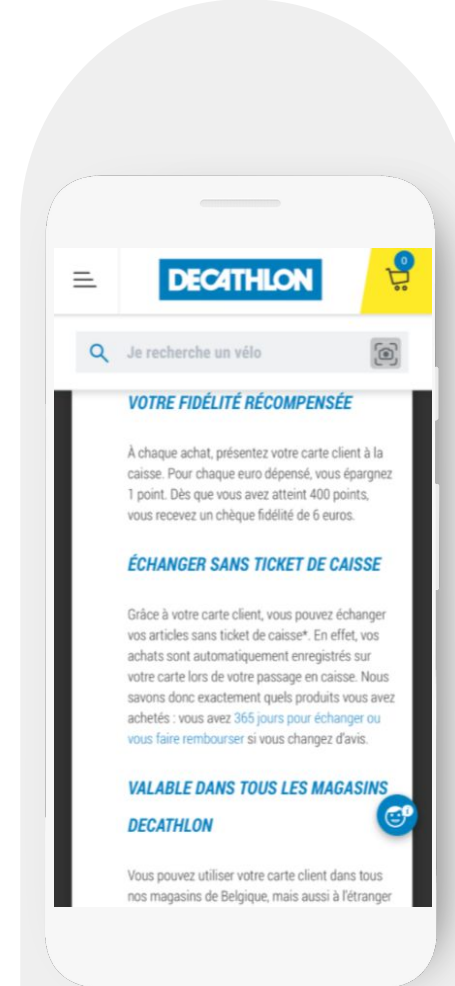
Stock indicators, product ratings, reviews, and store locators ensured a great foundation, but the key areas Decathlon stood out in were:

- **Great customer sign-up flow**, with the option to select personal preferences such as favourite sports and interests.
- **Clear and easy-to-use store locator page** with detailed information such as Google Business Profile ratings and store reviews, a message from the store manager, and a list of available in-store services.

- **Helpful customer service** with the ability to answer omnichannel & store related questions.
- **A rich loyalty programme for customers**. Members can earn and redeem points both online and in-store, and the card is valid across countries and gives the customer 365 days for returns as well as exclusive invites.

" It helps that we have a united vision and centralised solutions for most markets we operate in; for example, we have a common backend solution for almost all countries. Having these shared resources are crucial for us, as it means that we can exchange best practices between countries and learn from each other. That said, we also ensure there is autonomy to make decisions on a local level to cater for local nuances. "

– Alexandre Velge

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matas

Category definition:

The retailer gives customers a shopping experience that can be adapted and changed based on the customer's individual preferences e.g. an item ordered online can be returned in-store; store staff can order in-store for delivery at home; Click and Collect is available.

Why did Matas win this category?

- Matas have clear ratings and reviews on product pages, clearly indicate their stock both online and offline, and provide delivery and return information.
- Their Click & Collect process is clear and fast once in-store, as is returning online items to a physical store. All necessary documentation is included in the order confirmation, and refunds are processed quickly.

"At Matas we offer a seamless experience across the app, the website, and the store. It's just one Matas, it doesn't matter where or how you order. We are always pushing the boundary for how fast a parcel can be delivered – offering same day delivery wherever possible."

–Brian Andersen

Brian's top tips:

- Integrate live store inventory information on your webshop so it's easy to see availability
- Incentivise in-store teams – they are part of the omnichannel journey, so get them to see online and physical stores as connected, not as competition.
- A rewarding loyalty programme incentivises customers to be omnichannel shoppers. 75% of all Danish women are active Club Matas members.
- Content is king and a great way to connect to your customers. Explore offering the same guides and inspiration online that you offer in your physical store, e.g. 'how to' videos and information.

Brian Andersen
Group Digital Director, Matas

About Matas:

- Founded 1949
- Denmark's largest Health & Beauty retailer
- 260 physical stores across Denmark
- 1.7m members of loyalty programme, Club Matas
- Online orders account for 25% of annual sales

IKEA

Category definition:

The retailer connects user experiences across all online and offline channels and customer touchpoints, e.g.: loyalty programs are omnichannel; the online shop is promoted in-store, and vice versa; and the store is promoted online.

Why did IKEA win this category?

- IKEA clearly call out their offline channels on their website and in some newsletters. In-store signage points to their online channels.
- In-store kiosks showcase the full product range, and customers can transfer their shopping lists to their devices - which they can connect to via store WiFi.
- IKEA's Click & Collect process is clear and fast, as is returning online items to a physical store. All necessary documents are included in the order confirmation, and refunds are processed quickly.
- Gift cards can be bought and redeemed across all channels.

❝ Omnichannel isn't a choice. It's a necessity for retailers today. At IKEA, omnichannel customers are our most valuable customers, as they spend nearly 4X as much as our single channel customers. In the omnichannel circle, data is the fuel that seamlessly connects your touch points with the customer. ❞

–Karen Helweg

Karen's top tips:

- Create a vision that resonates with who you are as a brand and make the goal clear. That way, everybody can march in the same direction, at own their level of expertise, towards building that vision.
- Understand what your customer data means. Then, prioritise change management based on behavioural changes you can see emerging in the data.
- Listen to your customers – hear their feedback and adapt your strategy accordingly.

Karen Helweg
Chief Digital Officer,
IKEA Denmark

About IKEA:

- Founded 1943 in Sweden
- 59 stores across Nordics & Benelux regions
- 465 stores in 32 countries
- 164m global members of loyalty programme, IKEA Family
- IKEA sold their first flatpack in 1956 – and were the first company to have customers assemble their own furniture

 A.S.Adventure — WELCOME TO OUTDOOR & ACTION

tied with *Bever*

Category definition:

The retailer provides the guidance and direction a customer needs to find the products and information they want e.g.: live chat is available and able to answer questions throughout the buying journey; can filter products by store; provides expected delivery or collection day/time.

Why did A.S.Adventure win this category?

- The website offers detailed information for customers to plan their store visit.
- Strong Google Business Profile with opening hours, click to call, and map views.
- Clear delivery options including times/costs on all product pages, click & collect, pick-up points, next day delivery, free delivery.
- Good use of in-store technology; kiosks allow customers to scan barcodes for more information and there is free wifi in-store.

> Omnichannel amplifies our digital efforts. When we started trading online, our e-store had its own advertising budget and targets, mainly directed towards online performance. Now, the focus is increasingly on the omnichannel value. Consistency of information across all channels is key to this.

– Kenny Vigneron

Kenny's top tips:

"Our goal? Inspire our customers to push boundaries by stimulating their curiosity, a process that starts in our stores and online, where our extensive product range, personal service and expert advice create a world packed with unique experiences."

- Messaging is key to connecting your omnichannel journey: make sure your online and in-store messages are the same.
- Don't create an app for the sake of it – consider the use case first. Your site may serve the purpose equally well if it's a responsive platform.
- Never stop experimenting and testing.

Kenny Vigneron
E-Commerce Manager,
A.S.Adventure

About A.S.Adventure:

- Founded 1995
- Headquartered in Antwerp
- 50 stores in Belgium, Luxembourg and France
- 1.1m members of loyalty programme, 'Explore More'
- Part of the Yonderland Group (which includes co-winners, Bever, in its portfolio)

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netonnet

Category definition:

The retailer has convenient solutions for all customer shopping challenges regardless of channel, behaviour and preferences, e.g. online and offline availability of products is shown on product pages; customer ratings and reviews are available or can be entered online; all available delivery collection options for the product are shown.

Why did NetOnNet win this category?

- The website offers detailed information for customers to plan their store visit.
- Online channels are clearly promoted in-store, offering a seamless omnichannel experience.
- QR codes and NFC allow customers to shop as they walk through the store, or place an order for home delivery.
- By demonstrating the added value these services can provide consumers when in-store, they are more likely to revisit these channels at a later date.

> We have a short customer journey – if our customers would like to find a product and buy it, they can do so in just three clicks. What helps us is the how we work as a company – we're not siloed and as all our functions sit together we can find practical ideas and solutions that really help benefit the customer.

– Sofie Struwe

Sofie's top tips:

- Think like your customer and what is most convenient for them. In NetOnNet's case it's having a pick-up area outside the main store, immediately visible upon arrival.
- Offer QR and NFC codes on all products so customers can find out more information, ratings – or even order – with a single tap.
- Free in-store wifi is a must.

Sofie Struwe
Chief Commercial Officer, NetOnNet

About NetOnNet:

- Founded 1999
- Headquartered in Borås, Sweden
- 30 warehouse stores across Sweden and Norway
- >1.5m members of loyalty programme, Klubbhyllan
- Klubbhyllan's value exchange focuses on digital receipts, unique content and a 90 day guarantee

DECATHLON

Category definition:

The omnichannel experience is tailored to the customers needs and preferences, including personalised content and offers, the possibility to select your preferred store and preferred sports categories; and email newsletters are personalised based on past purchases and preferences.

Why did Decathlon win this category?

- Decathlon makes it easy to add personal details as part of the the sign-up flow, including date of birth, and categories of interest.
- The same approach is used in their email marketing. Customers receive birthday emails — and the product categories promoted align with user preferences.

> To offer a truly personal experience, it's important to understand the individual needs of your customers. By asking your customers the right questions and having customer profiles, you can offer them the most appropriate products, solutions or services.

– Alexandre Velge

Alexandre's top tips:

- Establish what makes your company unique and integrate this into your omnichannel approach to stand out from the competition in an authentic way.
- Pay attention to the detail: Our call centre is staffed by sports enthusiasts which means they are well placed to answer customer questions
- Consider your return policy: Decathlon offers a 365 day return period starting from the date of purchase. And you can return to any Decathlon store, no matter where or what channel you purchased from.

Alexandre Velge
Lead Onsite Customer Experience,
Decathlon Belgium

About Decathlon:

- Family-owned company founded in France in 1976
- 2080 stores in 56 countries
- Omnichannel journey started in 2012
- Decathlon in Belgium is temporarily spelt backwards 'Nolhtaced' to promote reverse shopping, which enables customers to resell old or unused sporting goods

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05 Deep dive

This section provides deeper insight and context into the BOX methodology.

Methodology

We developed a set of custom principles and criteria together with omnichannel consultancy Pattern. Mobile devices were used by Pattern's CX consultants to review the website-related CX criteria.

In addition, Pattern's consultants signed up for accounts and newsletters, made service enquiries and visited stores. Orders were placed for Click & Collect or home delivery, and each item was returned to evaluate the end-to-end omnichannel experience.

In total, we reviewed **71 retailers across 6 Northern European countries** – Denmark, Sweden, Norway, Finland, the Netherlands and Belgium.

Score calculation

We evaluated **43 criteria across 5 CX principles**. Each criteria was rated as pass (2 points), fail (0 points), or partly fail (1 point). The maximum score of 86 points results in a customer experience score of 100%.

Please note that:

- The business impact of improving on a specific criteria will differ by criteria / retailer.
- There is no guarantee that improving on a certain criteria will lead to better business results.

Websites were reviewed on smartphone devices without using emulators (i.e. the mobile browsing experience was not recreated on a desktop computer).

Stores were visited in various cities: Amsterdam, Brussels, Stockholm, Copenhagen, Oslo and Helsinki.

CX Benchmarking

◎ Objective

This report analyses how successful Northern European retailers have been in adopting omnichannel best practices for mobile.

✓ Scoring

2 = functionality/service provides a good customer experience
1 = functionality/service exists but there is some issue with the experience
0 = functionality/service does not exist or the experience is bad

⊕ Details

The research (conducted between December 2021 and February 2022) assessed in-store and mobile customer experience for 71 retailers across 6 Northern European markets.

⊕ Focus

The assessment criteria focused on omnichannel propositions, rating the functionality and services provided by retailers to ensure a seamless experience as they move across channels.

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