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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?

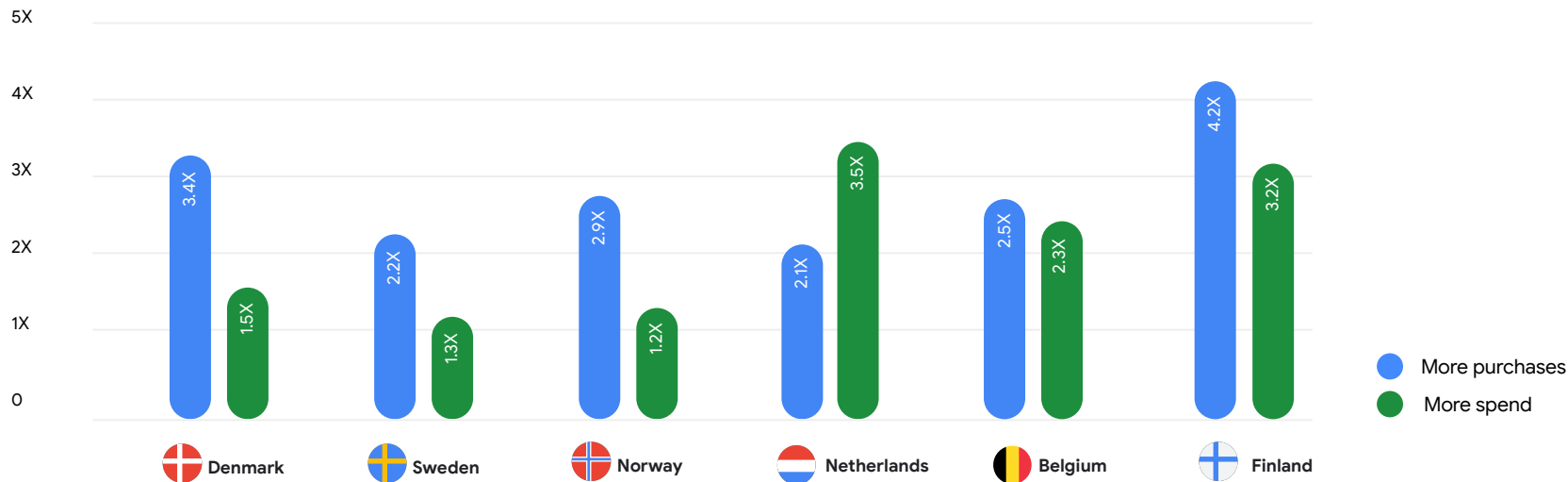
In this deck we present our findings, including a deep dive with the winners of each category, to inspire and inform your omnichannel marketing strategies.



Market

context

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



Google/Ipsos, "Holiday Shopping Study", November 2021 – January 2022.

- Denmark, online Danes 18+ n=1271 conducting activities across 5+ channels and n=131
- Sweden, online Swedes 18+ n=1055 conducting activities across 5+ channels and n=216
- Norway, online Norwegians 18+ n=1136 conducting activities across 5+ channels and n=212

- Netherlands, online Dutch 18+ n=1755 conducting activities across 5+ channels and n=538
  - Belgium, online Belgians 18+ n=1130 conducting activities across 5+ channels and n=176
  - Finland, online Finns 18+ n=1013 conducting activities across 5+ channels and n=211
- conducting activities across 1-2 channels who shopped for the holidays in the past two days and made a purchase.*

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The

omnichannel

challenge

# 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**.

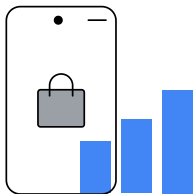




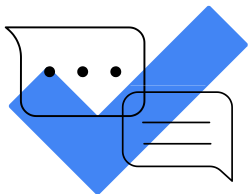
## Methodology

# 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:



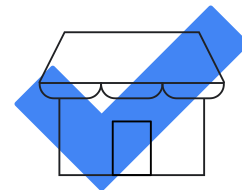
Mobile Website  
Evaluation



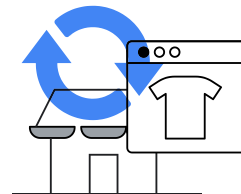
Customer Service  
Enquiries



Fulfilment



Store Visit  
& Evaluation



Actual Purchase,  
Click & Collect  
& Return to Store



Customer

Experience

Principles

# 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

customer

# 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



01

Overall



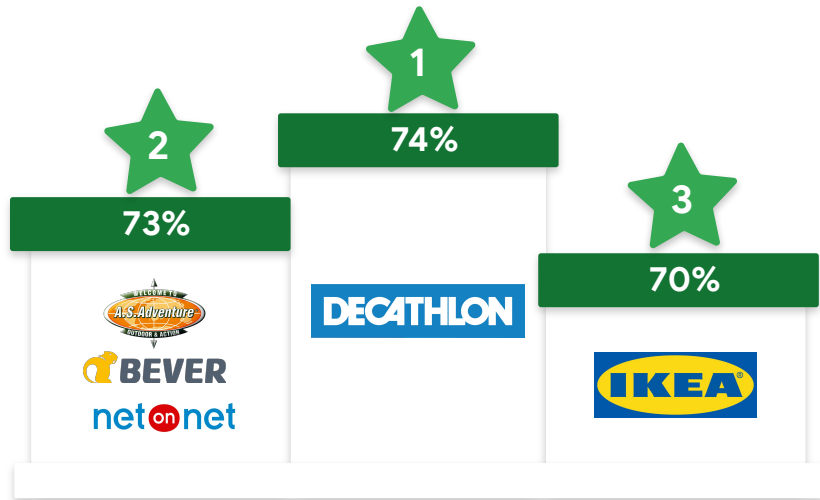
winners





Overall

winners



Overall Project BOX results for omnichannel experience

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.



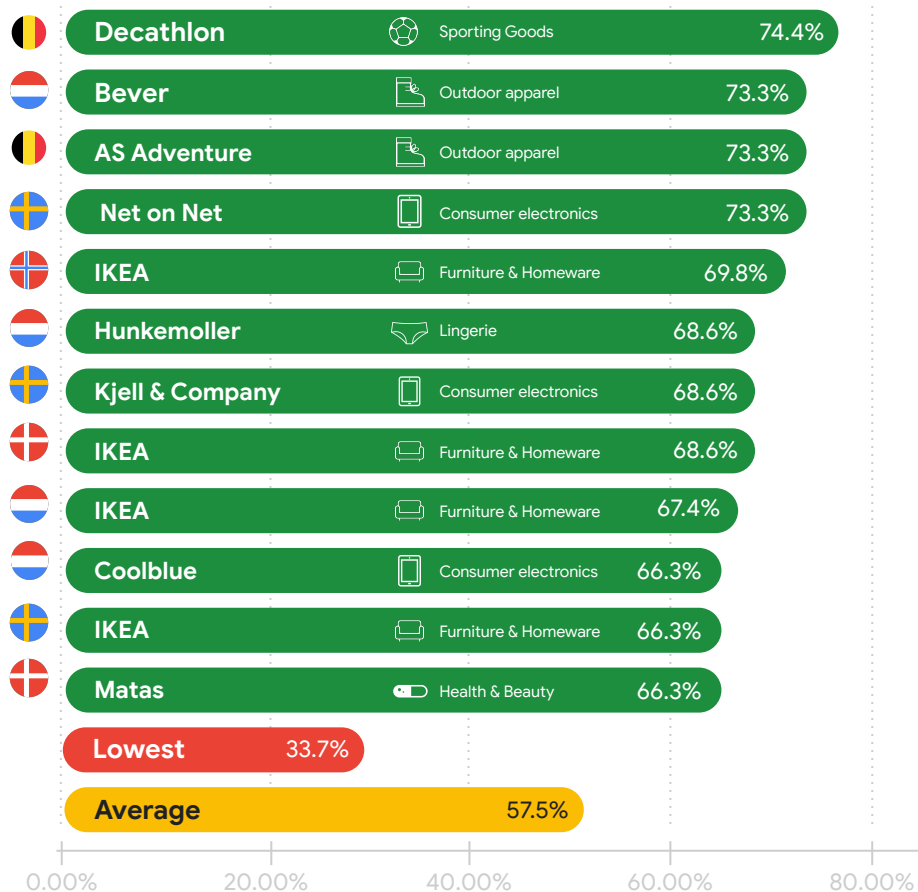
Industry

findings

# 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.



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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.

03

Results



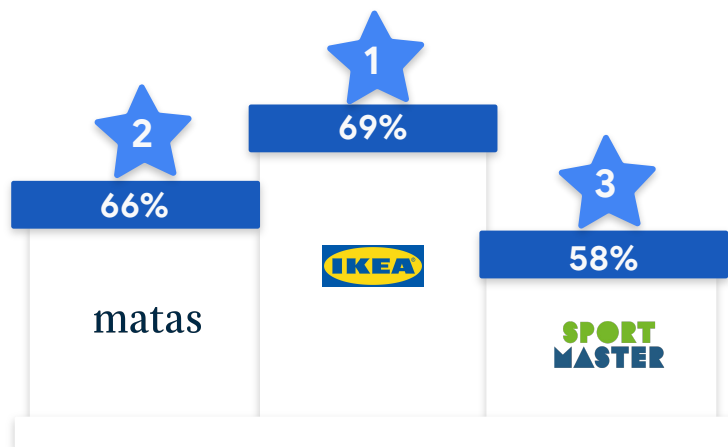
Per market



Market result

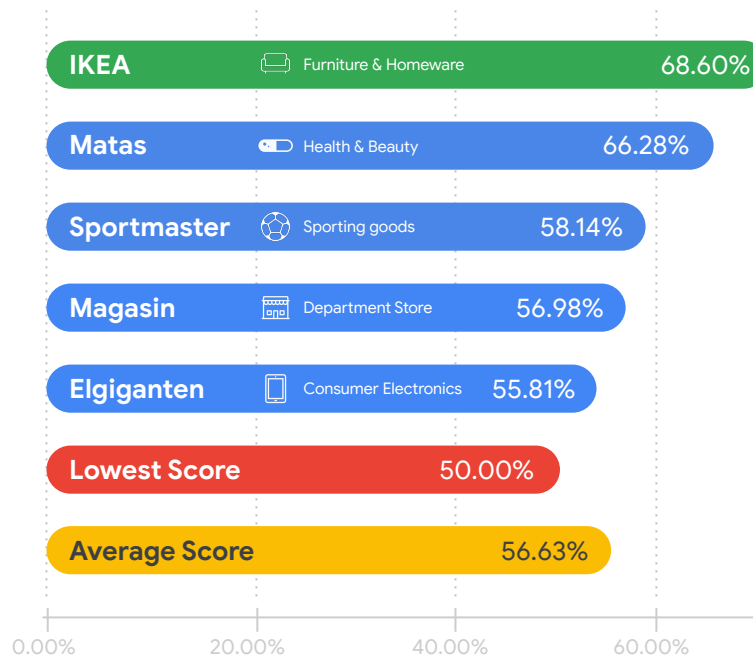
Denmark

Results (out of 10 retailers)



Overall Project BOX results for omnichannel experience

Summary: IKEA and Matas are pulling ahead of Danish competition



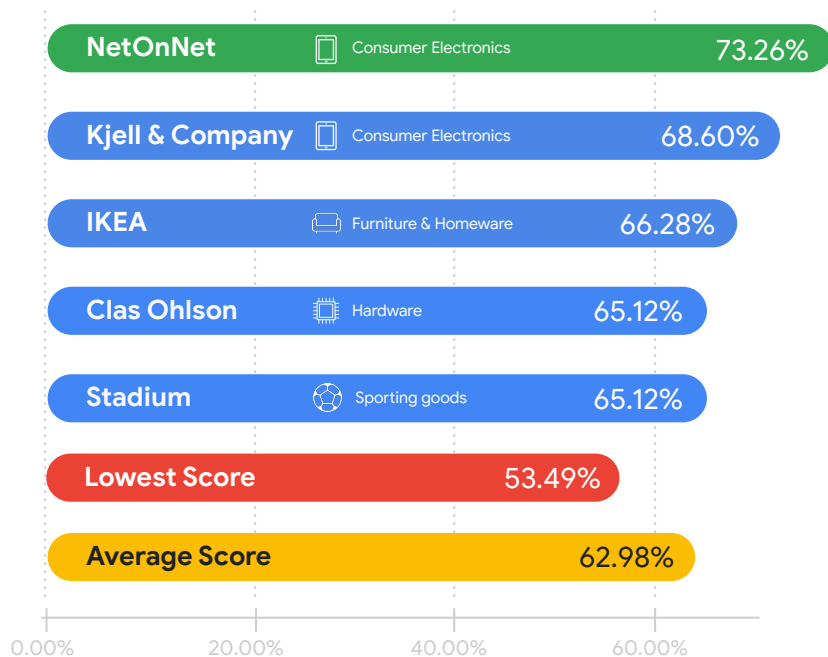
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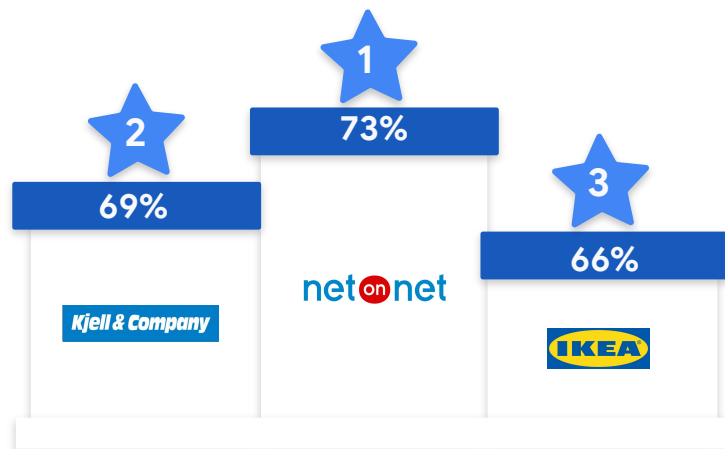
Market result

Sweden

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



Results (out of 12 retailers)



Overall Project BOX results for omnichannel experience

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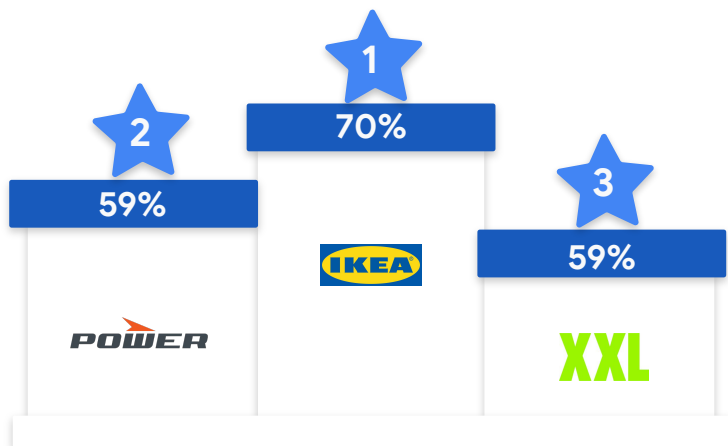




Market result

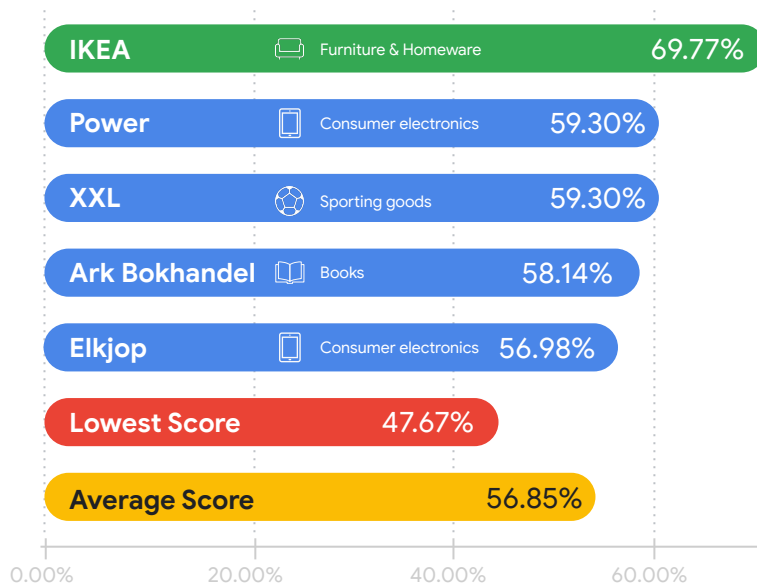
Norway

Results (out of 9 retailers)



Overall Project BOX results for omnichannel experience

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

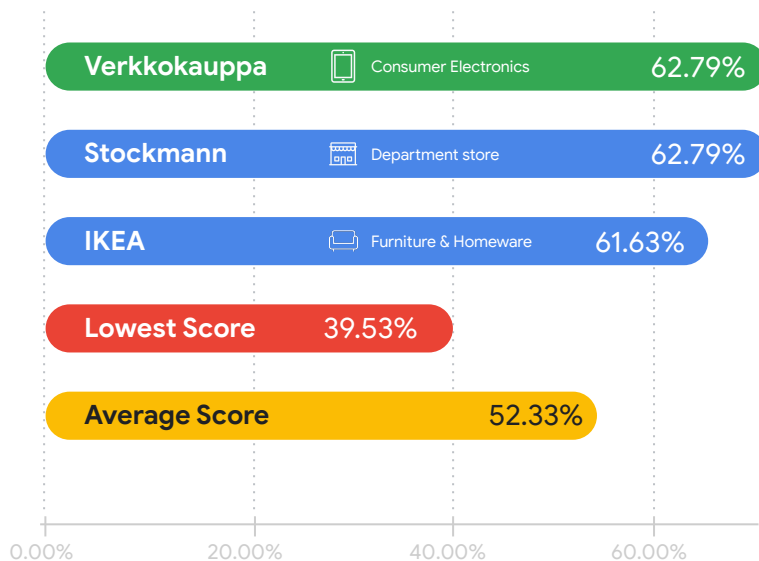




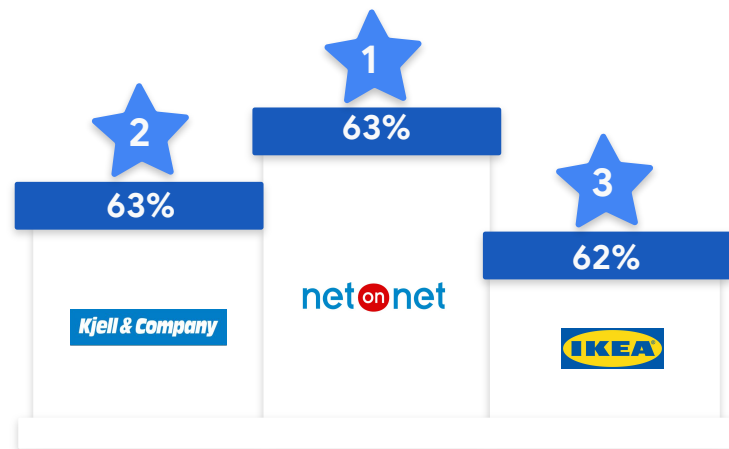
Market result

Finland

**Summary: Three retailers lead by a wide margin in Finland**



Results (out of 7 retailers)



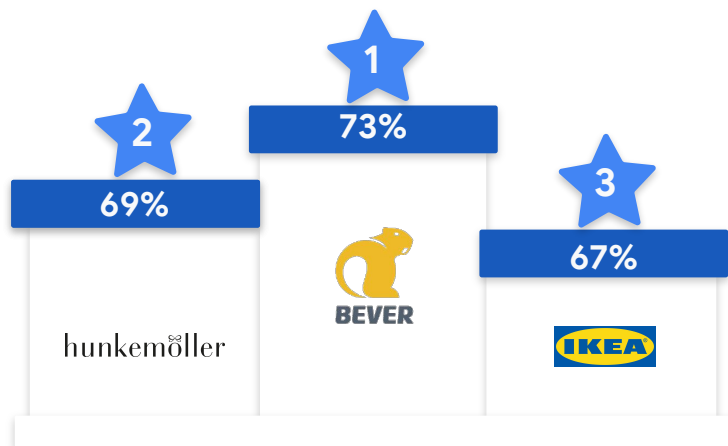
Overall Project BOX results for omnichannel experience



Market result

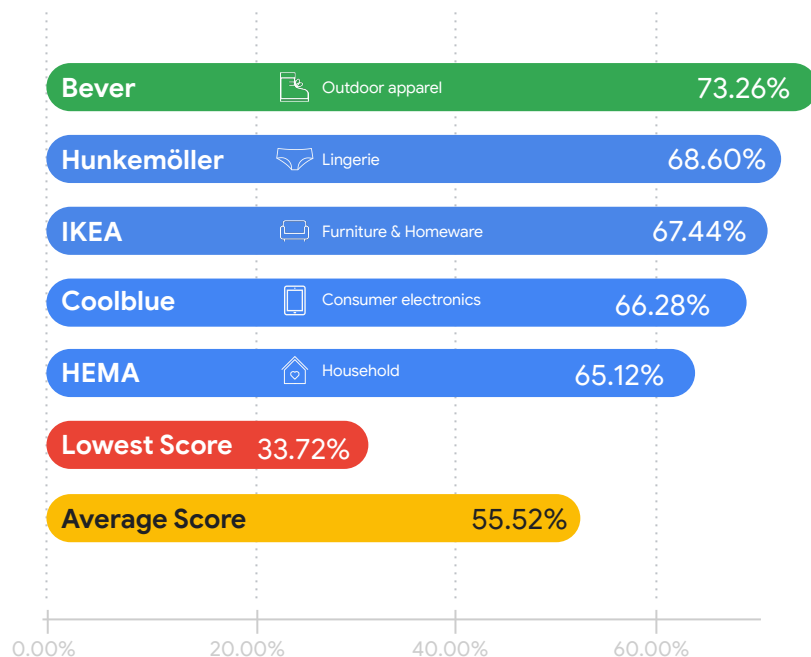
Netherlands

Results (out of 24 retailers)



Overall Project BOX results for omnichannel experience

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



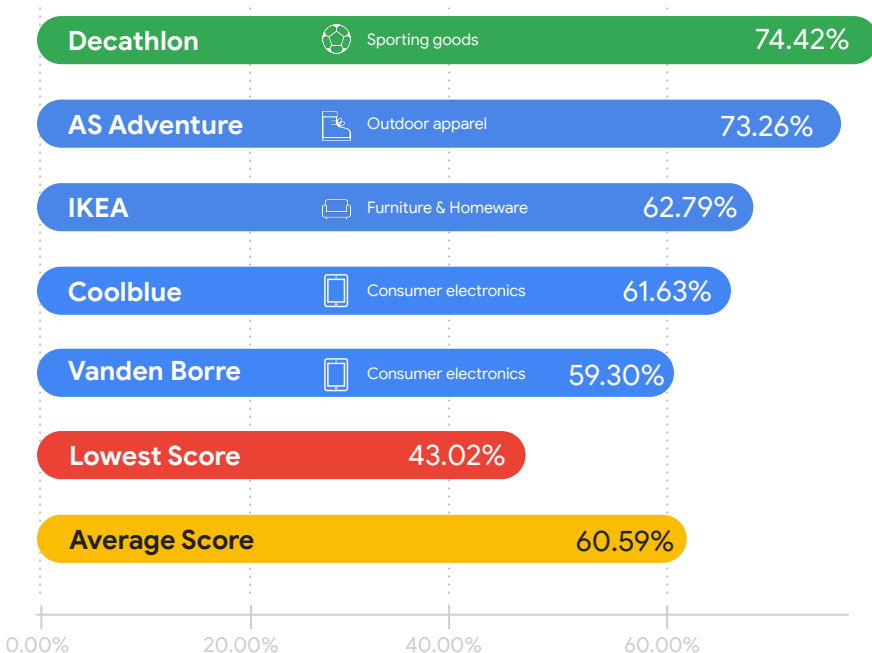
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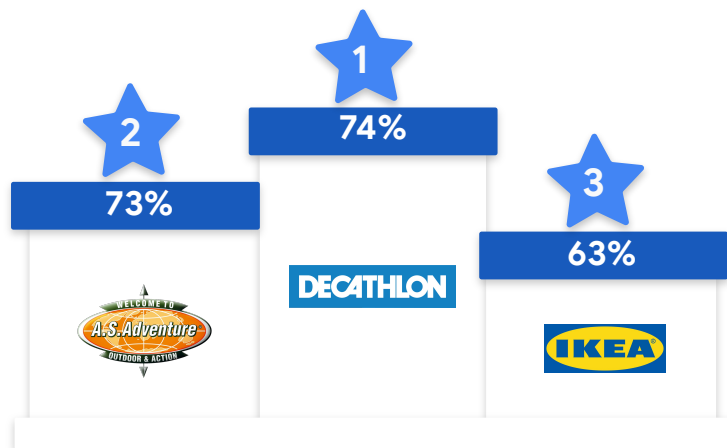
Market result

Belgium

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



Results (out of 9 retailers)



Overall Project BOX results for omnichannel experience

04

Lessons

from



the winning retailers



Winning retailers

per category



Overall Experience

**DECATHLON**



Most Flexible Experience

matas



Most Unified Experience



Most Informative Experience



Most Convenient Experience

net on net



Most Personalised Experience

**DECATHLON**



Best overall

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.

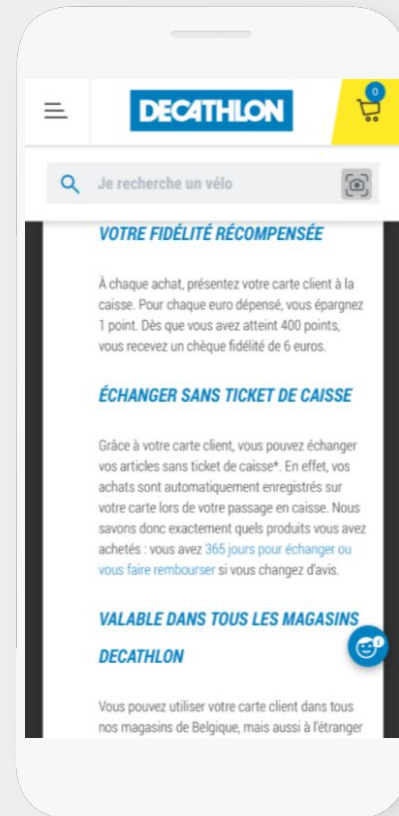
Stock indicators, product ratings, reviews, and store locators ensured a great foundation, but the key areas Decathlon stood out in were:

- **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





Most flexible experience

**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





## Most unified experience



### 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



## Most informative experience



*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.

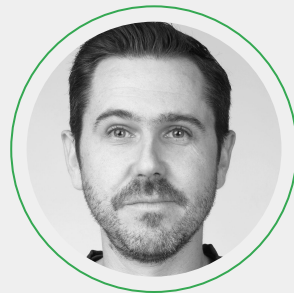
“Omnichannel amplifies our digital efforts. When we started trading online, our e-store had its own advertising budget and targets, mainly directed towards online performance. Now, the focus is increasingly on the omnichannel value. Consistency of information across all channels is key to this.”

– **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)



Most convenient experience

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

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## Most personalised experience

**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

05

Deep



dive



Methodology

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.



Benchmark

Deep dive

## 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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76 Wardour St, London, W1F 0UR