SWISS E-COMMERCE TREND INDICATOR 2017
A B2C STUDY BY THE UNIVERSITY OF APPLIED SCIENCES IN BUSINESS ADMINISTRATION ZURICH (HWZ) AND SWISS POST
WHAT ARE THE TRENDS AND HABITS IN SWISS E-COMMERCE?

The B2C study carried out by the University of Applied Sciences in Business Administration Zurich (HWZ) and Swiss Post addresses this question.

The data was collected in July 2017 via a quantitative online questionnaire. Over 10,000 people from all language regions of Switzerland participated in the study.

Sample structure
HOW OFTEN DO YOU SHOP ONLINE?

Around half of the respondents purchase online every month. 52%

The study also showed that younger people (up to 25 years) buy online more often than older people (65 years and older).

- Daily: 3%
- Weekly: 17%
- Monthly: 52%
- Every six months: 19%
- Annually: 4%
- Never: 5%
WHY DO YOU BUY ONLINE?

85% of respondents appreciate the flexibility of time shopping on the Internet affords them.

- I am not restricted by opening hours: 85%
- I can have my shopping delivered to my door: 82%
- I can find and compare the offers more easily: 81%
- There is a bigger range and wider availability of products: 69%
- It is more convenient than buying in a shop: 61%
- The prices are lower: 45%
HOW IMPORTANT ARE THE FOLLOWING CRITERIA TO YOU WHEN SHOPPING ONLINE?

Overall, respondents rate criteria such as “appropriate payment process” (89%) …

89% 82%

... and “free shipping” (82%) as important.

Appropriate payment process  Free shipping  Free returns  Customer service  Choice of shipping options  Shop certification

89% 82% 79% 71% 65% 62%
WHAT PRODUCTS DO YOU BUY MOST OFTEN ONLINE?

- Travel: 75%
- Books, music, films: 71%
- Event tickets: 69%
- Clothing: 63%
- Computers and accessories (hardware and software): 54%
- Multimedia devices and electrical appliances: 53%
- Sporting goods: 32%
- Toys: 26%
- Cosmetics: 23%
- Furniture: 13%
- Food: 12%
WHAT PRODUCTS DO YOU BUY MOST OFTEN USING YOUR SMARTPHONE?

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel</td>
<td>35%</td>
</tr>
<tr>
<td>Books, music, films</td>
<td>34%</td>
</tr>
<tr>
<td>Event tickets</td>
<td>32%</td>
</tr>
<tr>
<td>Clothing</td>
<td>28%</td>
</tr>
<tr>
<td>In-app purchases</td>
<td>24%</td>
</tr>
<tr>
<td>Media items</td>
<td>19%</td>
</tr>
<tr>
<td>Multimedia devices and electrical appliances</td>
<td>18%</td>
</tr>
<tr>
<td>Computers and accessories (hardware and software)</td>
<td>18%</td>
</tr>
<tr>
<td>Sporting goods</td>
<td>13%</td>
</tr>
<tr>
<td>Toys</td>
<td>10%</td>
</tr>
<tr>
<td>Cosmetics</td>
<td>11%</td>
</tr>
<tr>
<td>Furniture</td>
<td>6%</td>
</tr>
<tr>
<td>Food</td>
<td>6%</td>
</tr>
</tbody>
</table>
ON WHICH OF THE FOLLOWING VIRTUAL MARKET PLACES DO YOU SHOP?
WHAT ARE THE REASONS YOU SHOP ON VIRTUAL MARKET PLACES?

- Easy to compare prices, products and sellers: 73%
- Bundling of various product categories: 57%
- Product ratings and customer comments: 57%
- Customer-specific range: 30%
- More trust than in single online retailers: 27%
HOW OFTEN DO YOU USE YOUR SMARTPHONE FOR…?

42% of respondents never or seldom use their smartphone for online purchases.

- Search for information on products
- Purchasing products/services online
- Tracking, customer service, complaints

Never – seldom / Often – always
... AND IF NOT, WHY NOT?

63% of respondents say that smartphone displays are not large enough to view the products.

- Smartphone displays are basically too small for viewing products: 63%
- Entering information on a smartphone when making an online purchase is generally too cumbersome: 60%
- No overview of the entire product range: 59%
- No mobile optimization of online shops: 53%
- Security concerns: 40%
WHAT ARE THE VARIOUS REASONS FOR CANCELLING AN ONLINE ORDER?

- No delivery option to Switzerland: 81%
- Hidden costs: 80%
- My preferred payment option was not available: 78%
- Not user-friendly: 68%
- The product was unavailable: 67%
- Mandatory registration: 67%
WHICH PAYMENT OPTIONS DO YOU PREFER?

Overall, 85% of those surveyed prefer the invoice as a method of payment.
HOW IMPORTANT ARE THE FOLLOWING DELIVERY OPTIONS TO YOU?

Young people rely more on “same-day delivery” and also like to able to track consignments.

- Online consignment tracking
- Advance notice of consignment receipt
- Delivery on a preferred date
- Same-day delivery

(from 65 years up to 25 years)
HOW IMPORTANT ARE THE FOLLOWING ASPECTS REGARDING THE PACKAGING OF THE ORDERED GOODS?

The returns packaging is very important to 87% of respondents.

- Option to return using the same packaging: 87%
- Packaging adapted to the size of the goods: 85%
- No excessive packaging material: 73%
- Use of specific packaging several times (reusable packaging): 60%
- Packaging with an attractive design: 16%

16% value attractive presentation of the packaging.
IN TERMS OF DELIVERY, HOW IMPORTANT IS SUSTAINABILITY TO YOU?

40% see sustainability of the delivery method or transport as “rather important”.

- Important: 29%
- Rather important: 40%
- Neutral: 24%
- Rather unimportant: 4%
- Unimportant: 3%
WHAT TYPES OF CUSTOMER SERVICE ARE IMPORTANT TO YOU?

In terms of customer service, respondents rate “e-mails” (88%) as most important.

... and “telephone” (66%) as most important.

- E-mail: 88%
- Telephone: 66%
- Contact form: 66%
- On-site personal advice: 52%
- FAQ: 41%
- Chat: 22%
- Social media: 13%
The purpose of this study was to record and analyse the trends and habits of customers in the Swiss e-commerce market. A quantitative empirical study was chosen as the research approach to gather information on the trends and habits of e-commerce customers in Switzerland in a broad-based survey via an online questionnaire.

The questionnaire contained 23 closed questions and was divided according to the value chain or process chain in e-commerce into the areas of marketing, ordering, payment, logistics and customer service. The questions on marketing mainly studied the frequency of online purchases, the reasons for online shopping, the preferred product categories purchased online, the use of virtual marketplaces as well as the use of smartphones for online shopping. In the “Ordering” section, questions on the average volume of an online purchase (number and total price of items) per product category and the reasons for possible cancelled purchases were asked. In terms of payment and logistics, the focal point of interest from the findings was on customers’ preferred payment methods and delivery options. The section on customer service addressed the ways customers prefer to make contact and the type of information that should be provided by customer service. The demographic variables collected from study participants were gender, age and language.
The study was conducted from 10 to 17 July 2017. For economic research reasons and in order to reach the greatest number of potential study participants who could provide information on the selected topics, the questionnaire was communicated and distributed via Swiss Post’s private customer newsletter. Part of the sample researched therefore could be any potential e-commerce customer who had received the link to the survey via the newsletter or in any other way (by having it forwarded to them, for example). As an incentive to participate, two Apple iPads and two Kaloka vouchers (worth CHF 100 each) were offered in a prize draw for anyone who gave their contact information on the survey form. Following the survey the contact details and answers given in the questionnaire were separated so that no subjective conclusions could be drawn about the respondents.

The survey had a total sample of 16,982 participants. The completion rate was approximately 78% and the average time taken to complete the survey was about 11 minutes and twenty seconds (mean average) or 10 minutes (median average). The data was then cleaned to remove incomplete questionnaires and questionnaires completed very quickly in order to ensure the consistency and quality of the data. After cleaning the data as described above, the sample contained 12,884 participants.
Swiss Post

Swiss Post is a full service provider of e-commerce services to online retailers. As a partner to the HWZ Institute for Digital Business, it actively supports change in digital business as well as knowledge transfer and generation.

More information at:
www.swisspost.ch/e-commerce
The **Institute for Digital Business** at the HWZ is a point of contact for application-orientated digital knowledge. It conducts research projects, offers courses, supports SMEs through advisory and project services and provides knowledge on digital topics free of charge. The Center is headed by Manuel P. Nappo. The e-commerce trend indicator is methodically conducted and supported by the HWZ Institute for Strategic Management: Stakeholder View.

More information at:
www.fh-hwz.ch/cdb
www.fh-hwz.ch/ism

The **University of Applied Sciences in Business Administration Zurich (HWZ)** is a member of the Zurich University of Applied Sciences (ZFH). With approximately 2,200 students and 500 lecturers, the HWZ is Switzerland’s biggest University of Applied Sciences, offering part-time programmes in the field of economics only. It offers a wide range of part-time study programmes at bachelor and master level as well as a PhD option.

More information at:
www.fh-hwz.ch
www.facebook.com/fhhwz
or www.twitter.com/fhhwz
CONTACT

Post CH Ltd
PostLogistics
Competence Center Digital Commerce
Wankdorfallee 4
3030 Berne

e-commerce@swisspost.ch
www.post.ch/e-commerce

University of Applied Sciences in Business Administration Zurich (HWZ)
Institute for Digital Business
Lagerstrasse 5
8021 Zurich

manuel.nappo@fh-hwz.ch
www.fh-hwz.ch

University of Applied Sciences in Business Administration Zurich (HWZ)
Institute for Strategic Management: Stakeholder View
Lagerstrasse 5
8021 Zurich

www.fh-hwz.ch/ism