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# Comparison of **supply and demand**

Comparison of the 2020 online retailer and customer surveys, with a focus on sustainability

## Supply and demand in online shopping with an emphasis on sustainability

What do Swiss consumers want to see in terms of sustainability in e-commerce and how is online retail responding to these expectations? Discover the answers in our comparison.





## Overview of Topics

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# Shipping

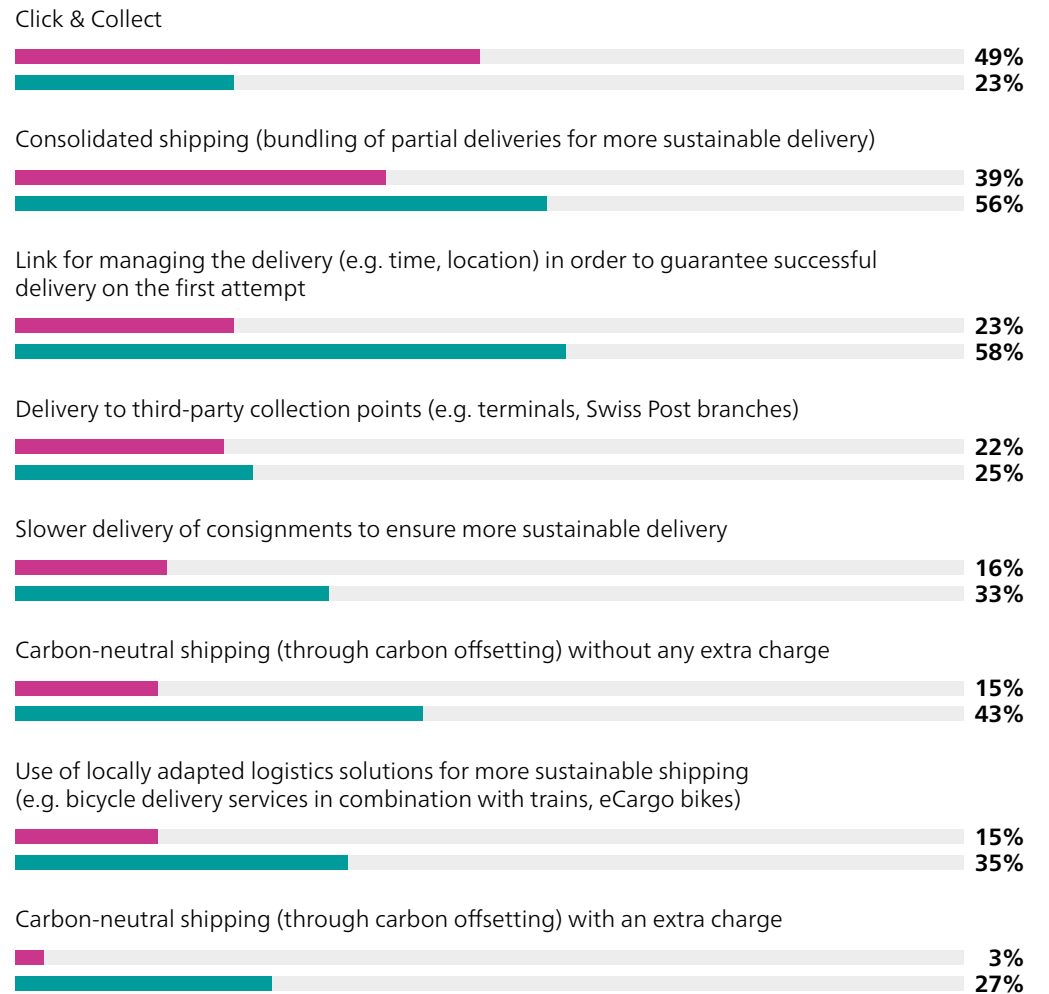
## Question for online retailer

Which of the following eco-shipping options do you offer your customers?

## Question for customer

How highly do you rate the following environmentally-friendly shipping options?

The majority of the eco-shipping options offered by online retailers do not meet customer needs.



# Packaging

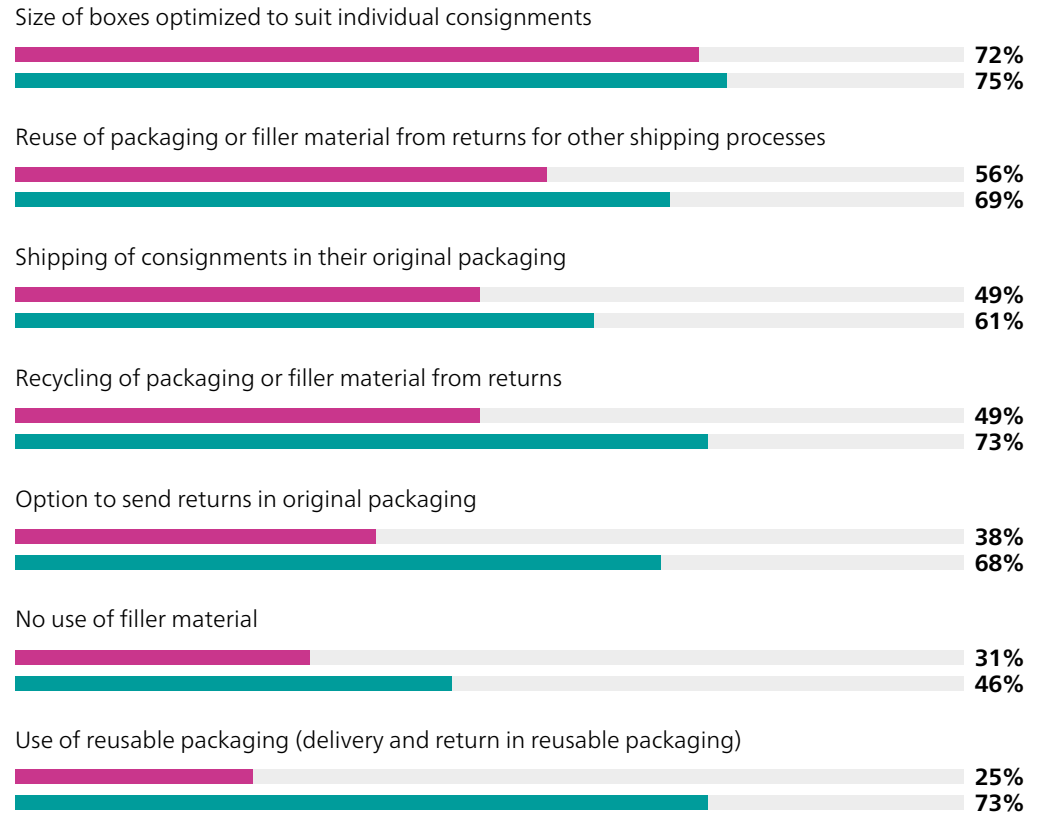
## Question for online retailer

Which of the following aspects are already implemented by your company when it comes to your packaging system?

## Question for customer

How important to you are the following aspects regarding the packaging of the ordered goods?

The use of reusable packaging is considered an important aspect by customers and yet there is room for improvement here on the part of the retailers.



## Consumer needs

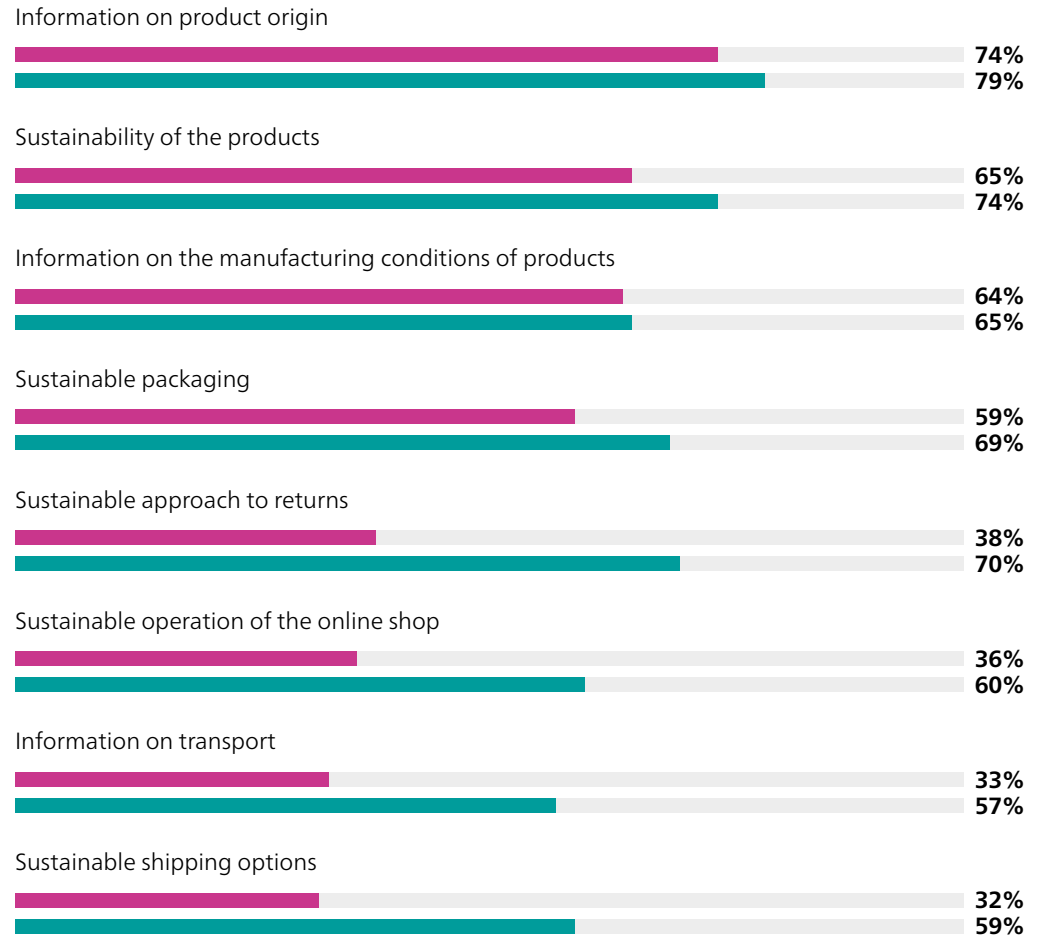
### Question for online retailer

What is your assessment of consumer needs with respect to sustainability over the past two years?

### Question for customer

How important do you rate the following sustainability aspects when shopping online?

Online retailers underestimate the needs of customers for sustainable return options.



# Study design

## Sample structure

The results of this comparison are based on the following studies: "Swiss e-commerce trend indicator 2020" and "Online retailer survey 2020: Sustainability in Swiss e-commerce".

### 2020 customer survey: Swiss e-commerce trend indicator



#### Sample size

13,596 participants (cleaned)



#### Survey period

9 June to 16 June 2020



#### Method

Quantitative online survey



#### Questions

26 closed questions

### Online retailer survey 2020: Sustainability in Swiss e-commerce



#### Sample size

227 online retailers



#### Survey period

3 March to 31 July 2020



#### Method

Quantitative online survey



#### Questions

22 closed, 1 semi-open and 3 open questions



## Study design

### Studio «Swiss e-commerce trend indicator 2020»

The purpose of the study is 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. The survey was conducted using an online questionnaire. The questionnaire comprised 26 closed questions and was divided according to the value chain or process chain in e-commerce into the areas of marketing, ordering, payment, logistics, sustainability and customer service.

The questions on marketing and ordering examined the frequency of online purchases, the reasons for online shopping, the preferred product categories purchased online, the use of virtual marketplaces, the use of smartphones and tablets for online shopping, as well as reasons for aborting purchases. In terms of payment and logistics, the focal point of interest from the findings was on customers' preferred payment methods and delivery options, as well as packaging and sustainability of transport. The section on customer service addressed the ways customers prefer to make contact. The demographic variables collected from study participants were gender, age and language.





## Study design

### Studio «Swiss e-commerce trend indicator 2020»

The survey was conducted in June 2020. For economic research reasons and in order to reach the greatest number of potential participants for the study, the questionnaire was communicated via Swiss Post's private customer newsletter. Part of the sample researched therefore could include any potential e-commerce customer who had received the link to the survey via the newsletter or in any other way (e.g. by having it forwarded to them).

The survey had a total sample of 19,251 participants. The completion rate was approximately 74% and the average time taken to complete the survey was about 13 ¼ minutes (arithmetic mean) or 11 ½ minutes (median). 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 final sample included 13,596 participants.

## Study design

### Study «Online retailer survey 2020: Sustainability in Swiss e-commerce»

The aim of the study was to find out how Swiss online retailers approach the topic of sustainability, what measures they implement and what challenges they face. Sustainability data was collected and analyzed along the entire e-commerce value chain in online retail. A quantitative empirical study was chosen as the research approach. In order to reach the largest possible number of potential study participants, the survey link was distributed in a targeted manner across Swiss digital commerce networks.

The survey contained a total of 22 closed, 1 semi-open and 3 open questions relating to the following themed sections: product range, online shop operation, intralogistics & storage, shipping and packaging, returns, cooperation with partners, consumer needs, priority topics, competitive edge, communication and marketing, as well as type and size of the online shop.



# Institute of Communication and Marketing IKM

## Lucerne School of Business

The IKM represents the competence fields of communication and marketing at the Lucerne University of Applied Sciences and Arts and continually works to advance these spheres. Special attention is given to the requirements brought about by digitization.

As a competent partner for lifelong learning (LLL), IKM offers training courses in the fields of communication and marketing at Bachelor's and Master's level, as well as continuing education courses at CAS and MAS level.

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More information at: [www.hslu.ch/ikm](http://www.hslu.ch/ikm)

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## Institute for Digital Business

### The University of Applied Sciences in Business Administration Zurich (HWZ)

The Institute for Digital Business at the HWZ is a point of contact for application-oriented 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 institute 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/idb](http://www.fh-hwz.ch/idb)

[www.hwzdigital.ch](http://www.hwzdigital.ch)

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# Institute for Digital Business

## The University of Applied Sciences in Business Administration Zurich (HWZ)

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 largest University of Applied Sciences that exclusively offers part-time programmes in the field of economics. It offers a wide range of part-time study programmes at bachelor and master level as well as a PhD option.

More information at:

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## Swiss Post

Swiss Post guides companies through digital retail. As a partner of the Institute of Communication and Marketing IKM at the Lucerne University of Applied Sciences and Arts, Swiss Post actively supports change in digital business, as well as knowledge transfer and generation.

More information at: [www.swisspost.ch/digital-commerce](http://www.swisspost.ch/digital-commerce)

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