

2020 customer survey: Swiss e-commerce trend indicator

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 Swiss Post and the University of Applied Sciences in Business Administration Zurich (HWZ) addresses this question.

The data was collected in June 2020 via a quantitative online questionnaire. Over 13,000 people from all language regions of Switzerland participated in the study.





Study design

The purpose of the study

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

The purpose of the study

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

Sample structure



Sample size

13,596 participants (cleaned)



Survey period

9 June to 16 June 2020



Method

Quantitative online survey



Questions

26 closed questions

Study design

Sample structure

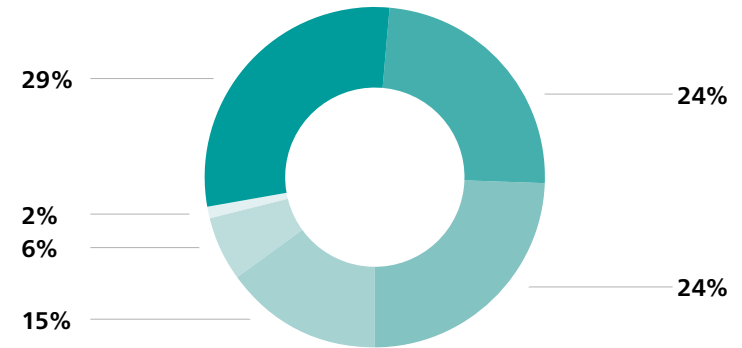
Language

- German
- French
- Italian



Age

- 65 years or over (29%)
- 55-64 years (24%)
- 45-54 years (24%)
- 35-44 years (15%)
- 25-34 years (6%)
- Up to 24 years (2%)



Study design

Sample structure

Gender



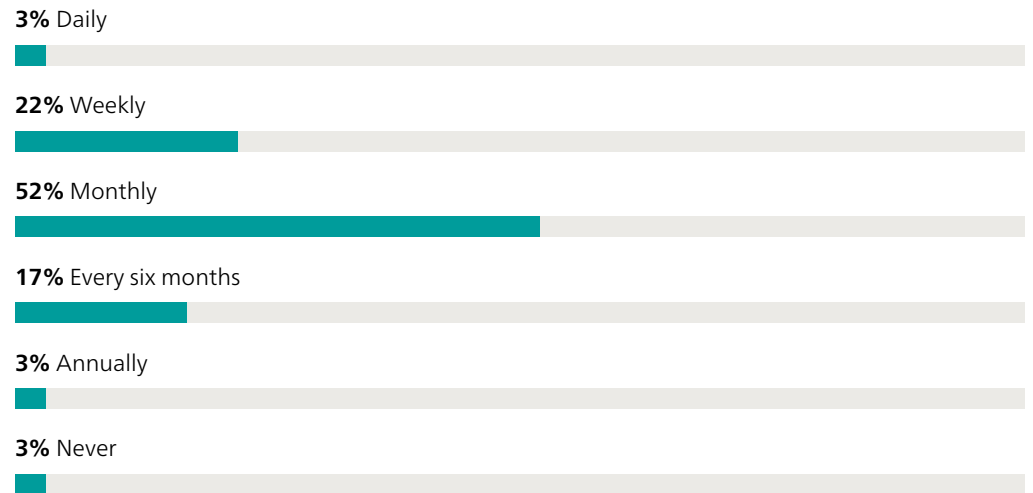
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Marketing

1. How often do you shop online?

77% shop monthly or more frequently online.



Marketing

2. Why do you buy online?

82% of respondents appreciate the flexibility of time shopping on the Internet affords them.

82% I am not restricted by opening hours



81% I can have my shopping delivered to my door



73% I can find and compare the offers more easily



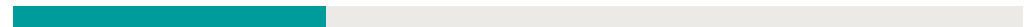
62% There is a bigger range of products



52% It is more convenient than buying in a shop



31% The prices are lower



Marketing

3. How important are the following criteria to you when shopping online?

Overall, respondents highly rate criteria such as appropriate payment processing (89%) and free shipping (77%).

89% Appropriate payment process



77% Free shipping



74% Free returns



70% Customer service



61% Shop certification



58% Product reviews



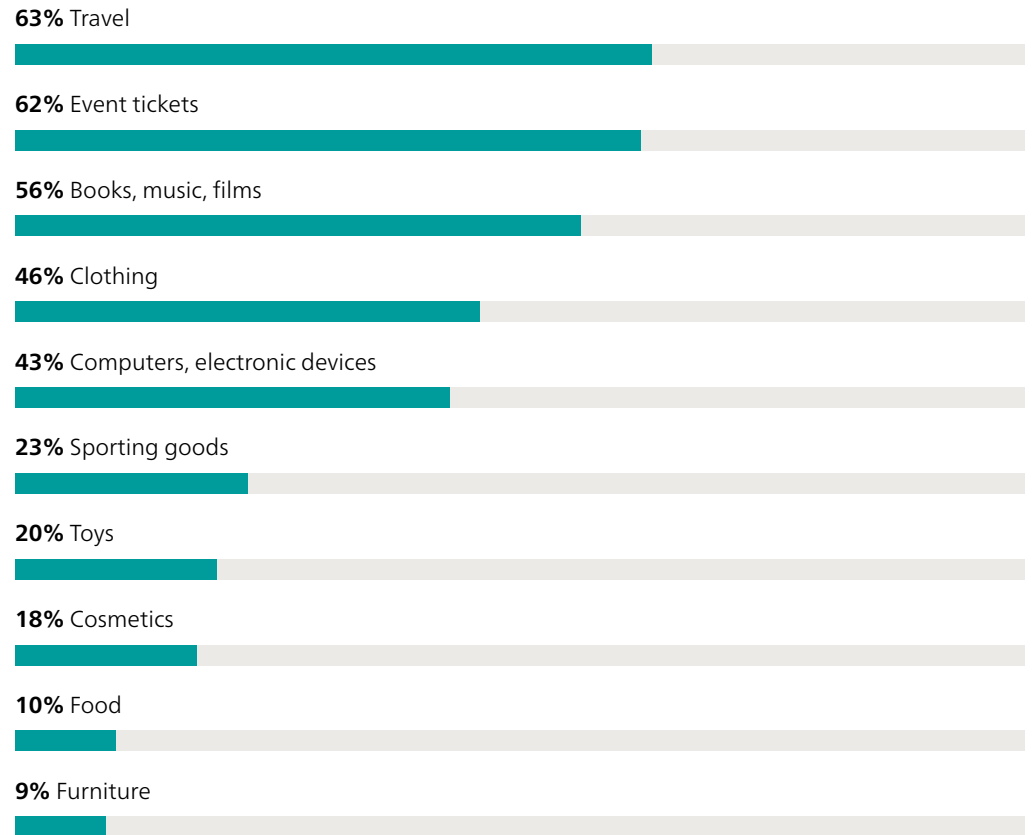
57% Choice of shipping options



Marketing

4. What products do you buy most often online?

Trips, event tickets and entertainment are predominantly purchased online. The online demand for furnishings and food, however, is lower.



Marketing

5. How often do you use your smartphone/tablet for...?

A third of respondents regularly use their smartphone/tablet for online purchases.

Smartphone

48% Search for information on products



32% Purchasing products/services online



25% Tracking, customer service



Tablet

51% Search for information on products



36% Purchasing products/services online



26% Tracking, customer service



Marketing

6... and if not, why?

Difficulties with text entry and lack of clarity are the main reasons why consumers avoid shopping on smaller devices such as smartphones and tablets.

Smartphone

55% No overview of the entire product range



53% The displays are too small for viewing products



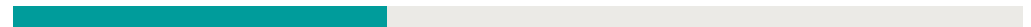
52% Entering information when purchasing online is too cumbersome



47% No mobile optimization of online shops



37% Security concerns



Tablet

32% Entering this online is too complicated



30% No mobile optimization of online shops



27% No overview of the entire product range



25% The displays are too small for viewing products



21% Security concerns



Orders

1. If you have a choice when shopping online: who is your preferred retailer?

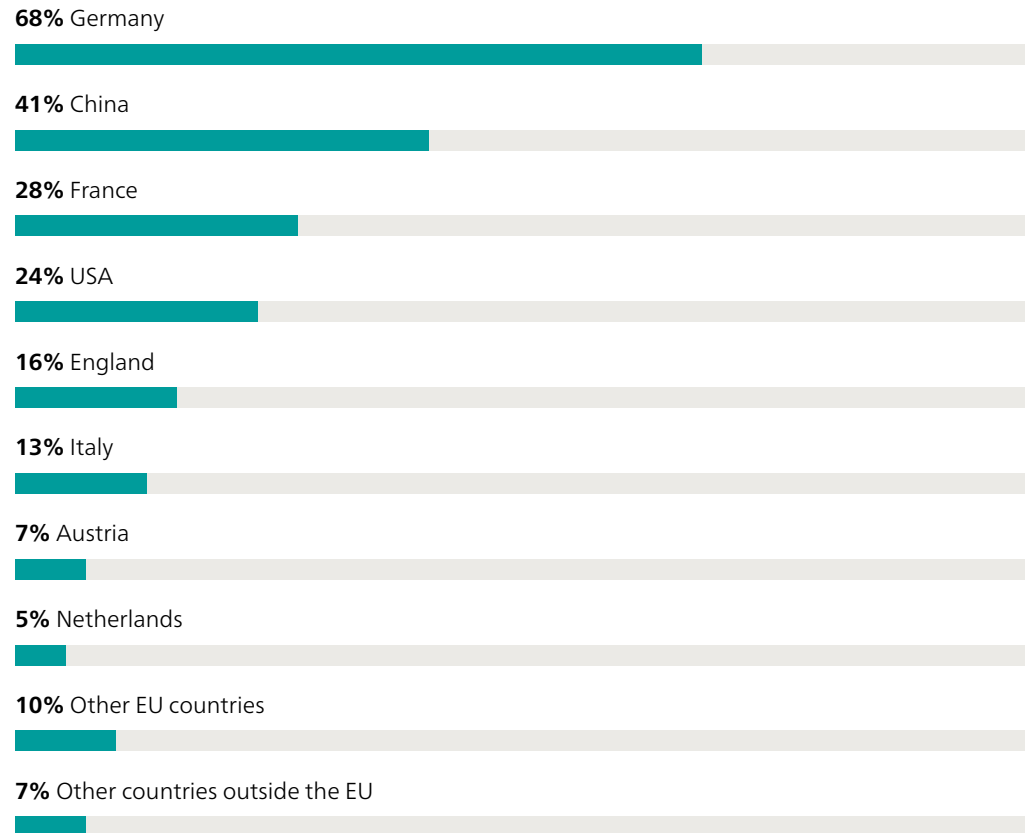
Around two thirds of those surveyed would prefer to purchase directly from the manufacturer, rather than through a retailer or marketplace.



Orders

2. In which countries are the online shops based that you have used to make purchases in the past 12 months?

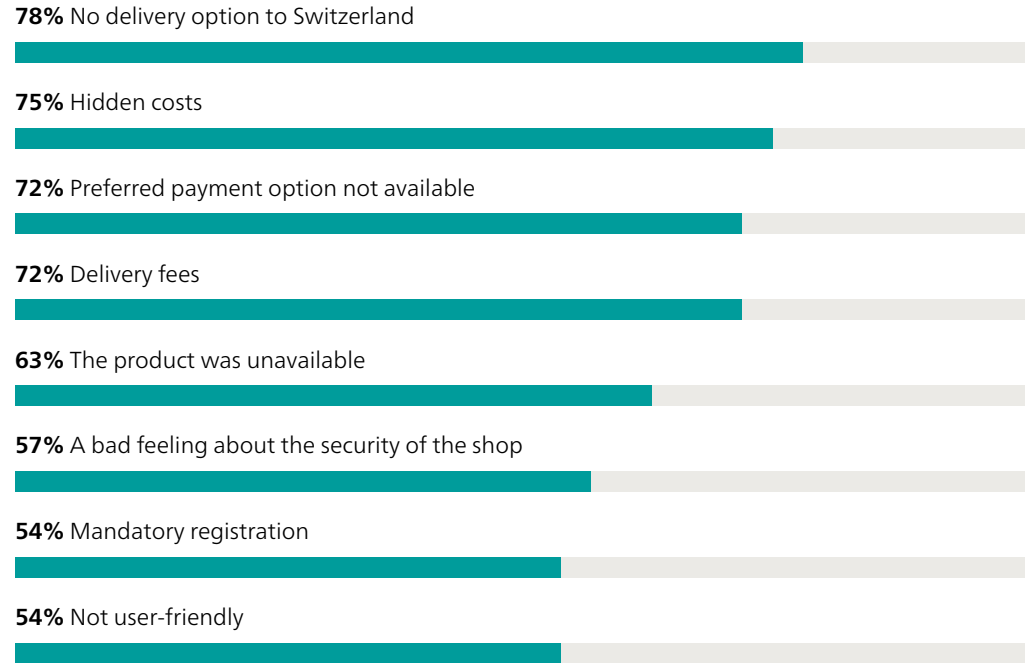
68% percent have purchased from German online shops in the last twelve months, 41% from China.



Orders

3. What are the various reasons for cancelling an online order?

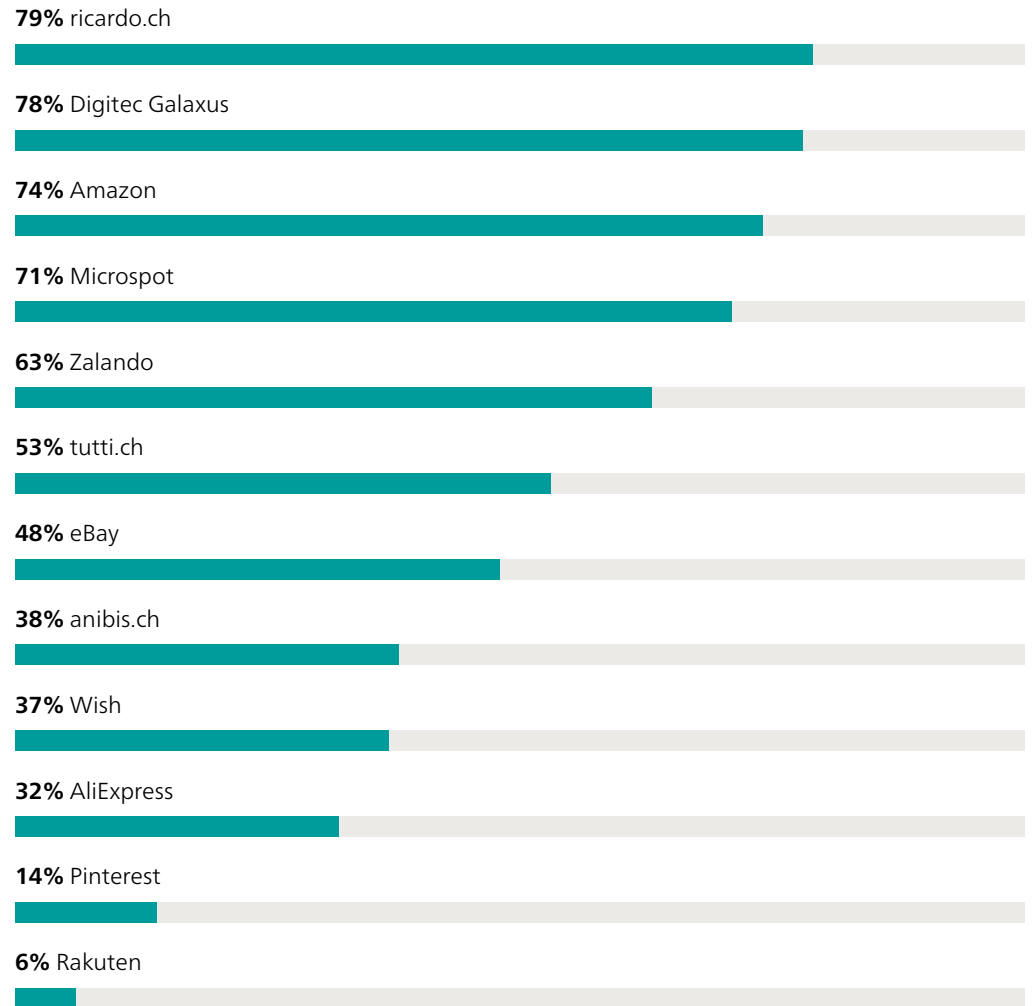
The main reasons for cancelling the order process are no delivery to Switzerland and hidden costs.



Virtual marketplaces

1. On which of the following virtual marketplaces do you shop?

Ricardo, Digitec Galaxus, Amazon and Microspot are among the most popular online marketplaces for Swiss online shoppers.



Virtual marketplaces

2. What are the reasons you shop on virtual marketplaces?

Virtual marketplaces primarily enable the consumer to compare products, prices and retailers.

71% Easy to compare prices, products and sellers



56% Low prices



51% Bundling of product categories



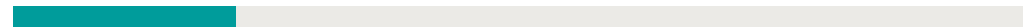
46% Product ratings and customer comments



41% Customer-specific range



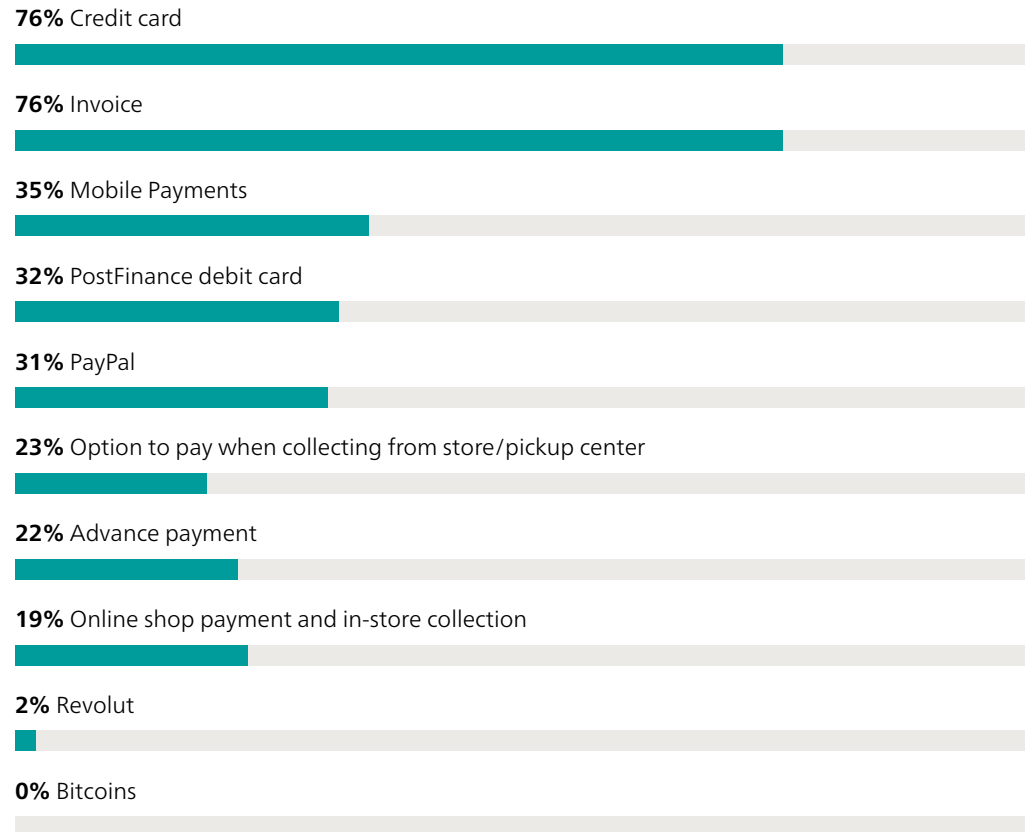
22% More trust than in single online retailers



Payment

1. Which payment options do you prefer?

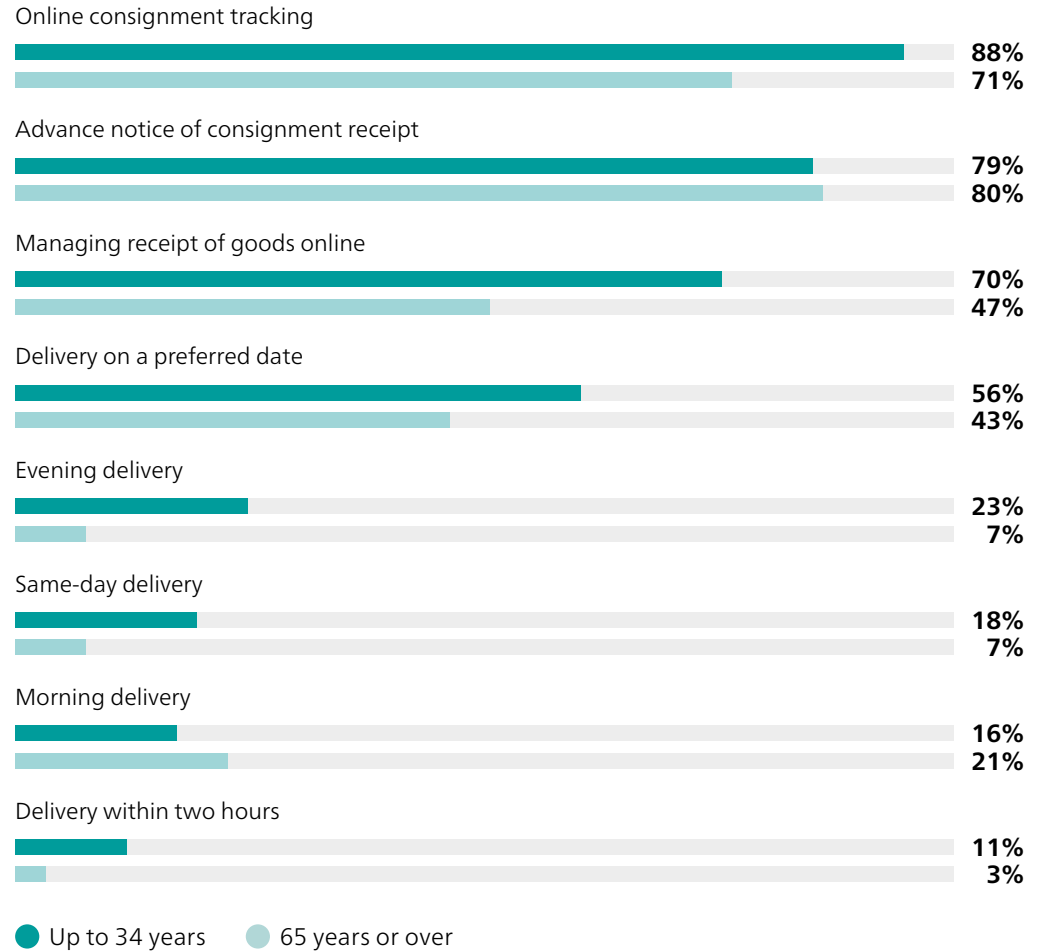
The majority prefer to pay by credit card or by invoice.



Logistics and sustainability

1. How important are the following delivery options to you?

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



Logistics and sustainability

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

More than half of the online consumers surveyed prefer multiple purchases to be shipped together.

56% Consolidated shipping (bundling of partial deliveries for more sustainable delivery)

43% Carbon-neutral shipping (through carbon offsetting) without any extra charge

35% Use of locally adapted logistics solutions for more sustainable shipping (e.g. bicycle delivery services in combination with trains, eCargo bikes)

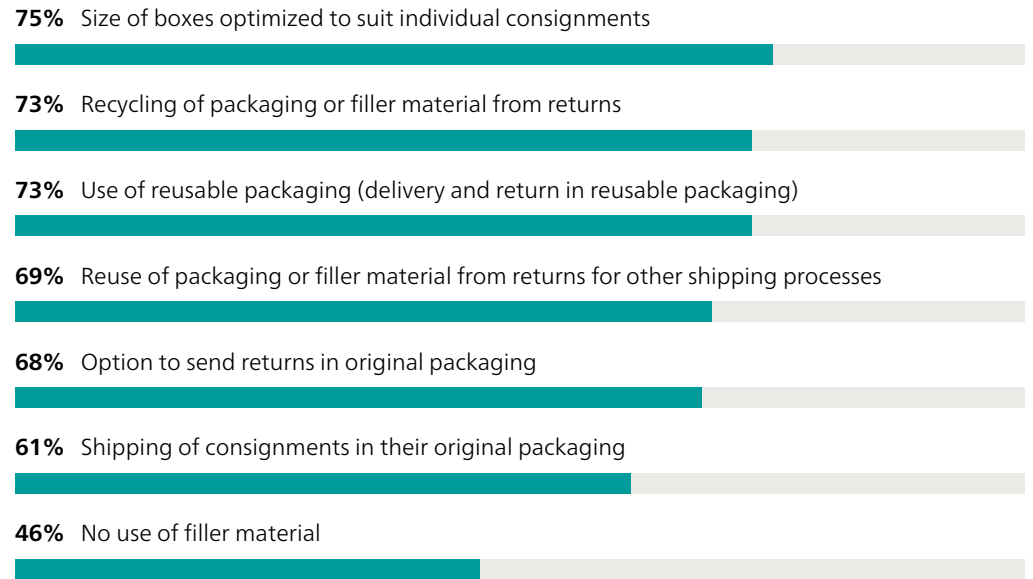
33% Slower delivery of consignments to ensure more sustainable delivery

27% Carbon-neutral shipping (through carbon offsetting) with an extra charge

Logistics and sustainability

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

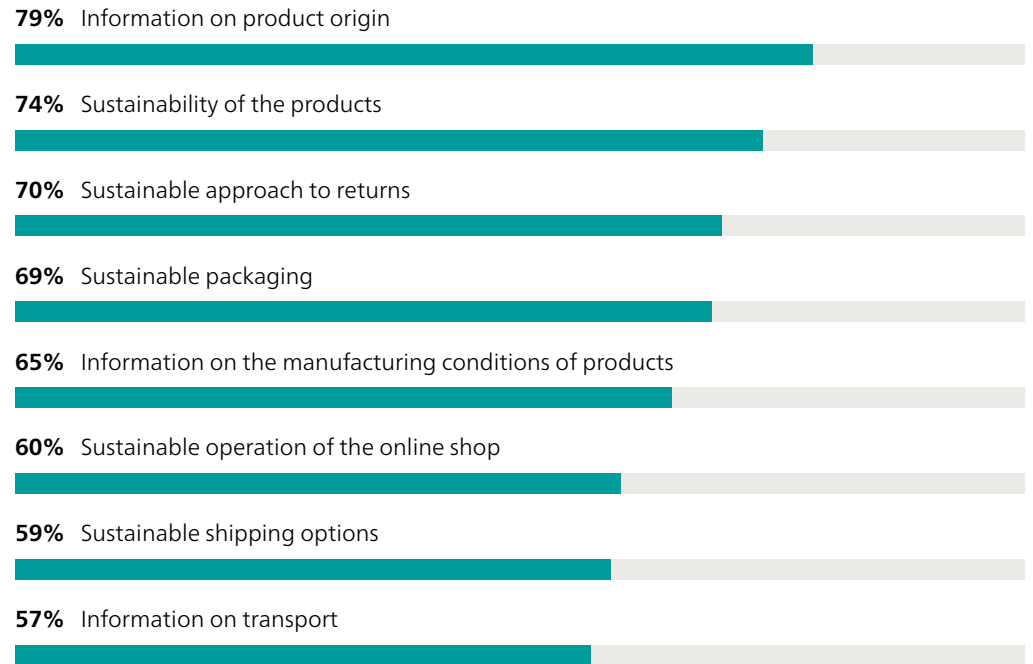
Retailers can impress their customers with customized packages, recycling and reusable packaging.



Logistics and sustainability

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

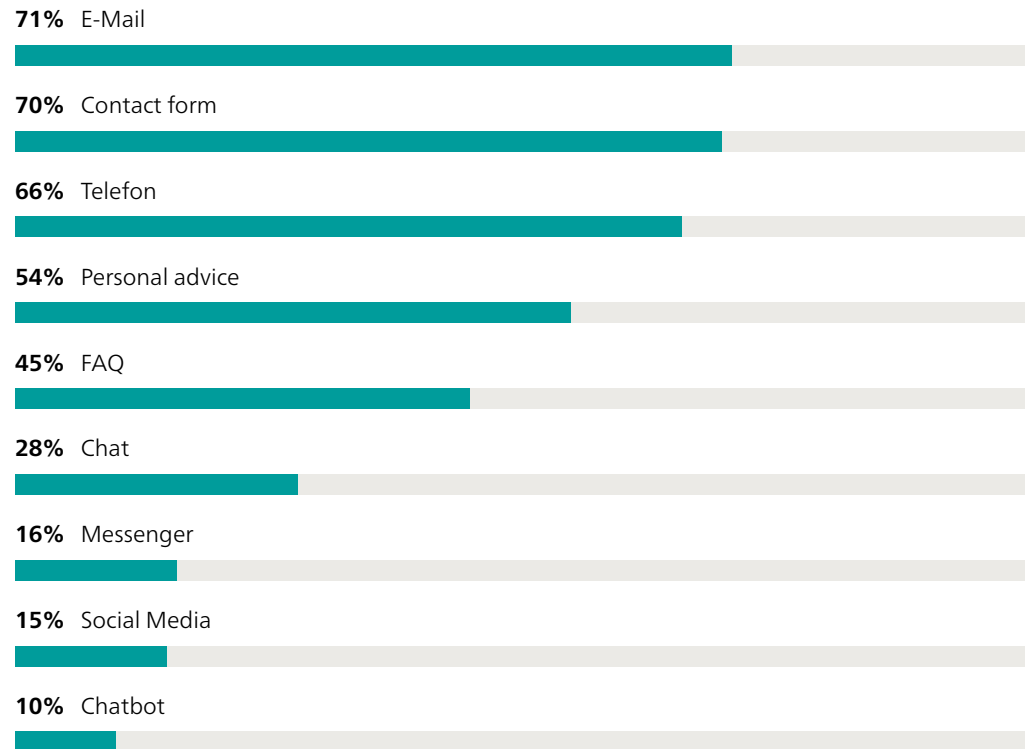
79% would like to have transparency with regard to product origin.



Customer care

1. What types of customer service are important to you?

In terms of customer service, respondents rate «e-mails» (71%) and «contact form» (70%) the most important.





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

www.hwzdigital.ch

University of Applied Sciences in Business Administration Zurich (HWZ)

Institute for Digital Business

Manuel P. Nappo

Lagerstrasse 5

8021 Zurich

Switzerland

manuel.nappo@fh-hwz.ch

www.fh-hwz.ch

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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University of Applied Sciences in Business Administration Zurich (HWZ)

Institute for Strategic Management:

Stakeholder View

Lagerstrasse 5

8021 Zurich

Switzerland

www.fh-hwz.ch/ism

Swiss Post

Swiss Post guides companies through digital retail. As a partner to the HWZ Institute for Digital Business, it actively supports transformation in digital business as well as knowledge transfer and generation.

More information at: www.swisspost.ch/digital-commerce

Post CH Ltd
Competence Center Digital Commerce
Wankdorffallee 4
3030 Berne
Switzerland
digital-commerce@swisspost.ch

Post CH Ltd
Competence Center Digital Commerce
Wankdorffallee 4
3030 Berne
Switzerland

digital-commerce@swisspost.ch
www.swisspost.ch/digital-commerce

