

2021 customer survey: Swiss e-commerce trend indicator

A B2C study by Swiss Post and the University of Applied Sciences in Business Administration Zurich (HWZ)



What are the trends and habits in Swiss online retail?

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 May 2021 via a quantitative online questionnaire. Over 11,000 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 analyze 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 May 2021. 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 12,078 participants. The completion rate was approximately 72%, the median time taken to complete the survey was about 12 minutes. 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 11,545 participants.

Study design

Sample structure



Sample size

11,545 participants (cleaned)



Survey period

18 to 31 May 2021



Method

Quantitative online survey



Questions

26 closed questions

Study design

Sample structure

Gender



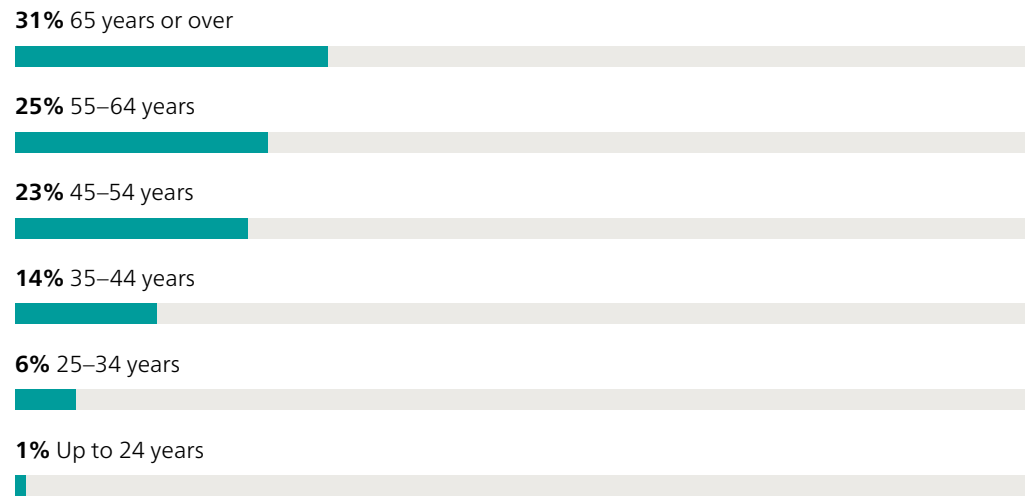
- Female
- Male

Language



- German
- French
- Italian

Age





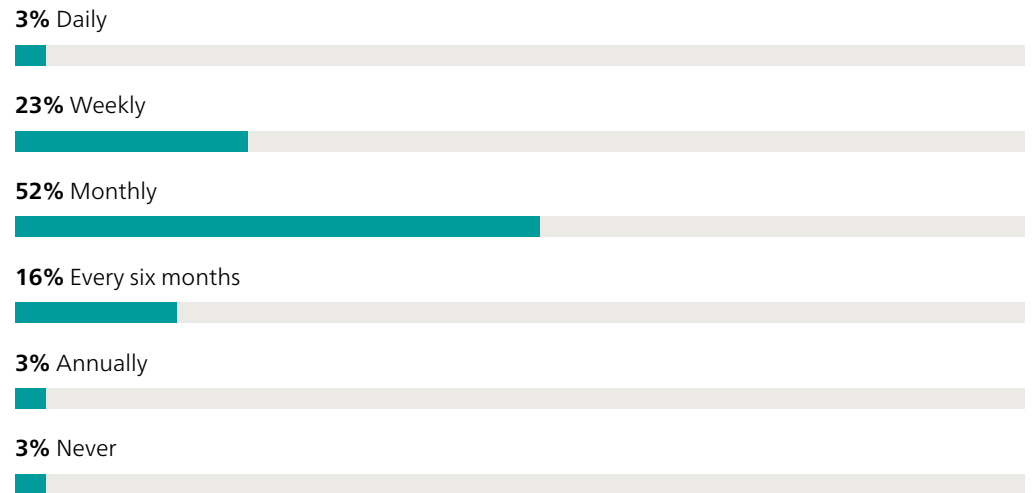
Overview of topics

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Marketing

How often do you shop online?

78% shop monthly or more frequently online.



Marketing

Why do you buy online?

78% of respondents appreciate the flexibility in terms of time offered by online shopping. 41% of respondents shop online primarily because of the COVID-19 pandemic.

78% I am not restricted by opening hours.



78% I can have my shopping delivered to my door.



72% I can find and compare the offers more easily.



62% There is a bigger range of products.



51% It is more convenient than buying in a shop.



41% Because of the COVID-19 pandemic.



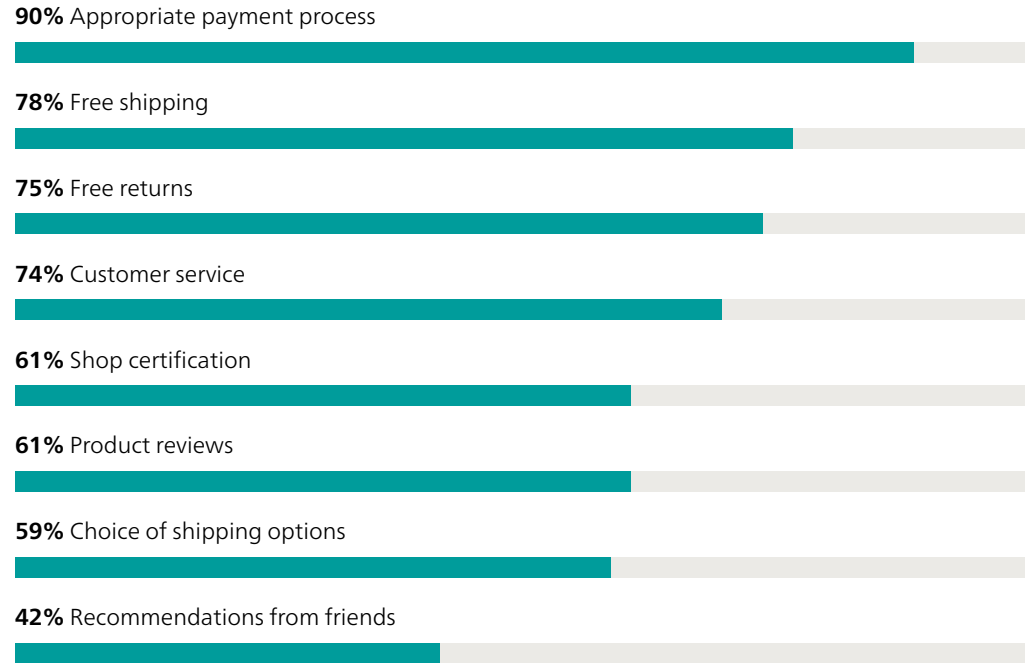
28% The prices are lower.



Marketing

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

The most important criteria for the respondents are efficient payment processing (90%) and free delivery (78%).



Marketing

Where are you most likely to start your product search when shopping online?

79% begin their product search when shopping online on search engines. The platforms Digitec / Galaxus (35%) or Zalando (21%) are also popular.

79% Search engines (Google, Bing, etc.)

35% Digitec / Galaxus

21% Zalando

16% Ricardo

15% Amazon

11% Social Media (Instagram, Facebook, etc.)

5% Forums/discussion platforms

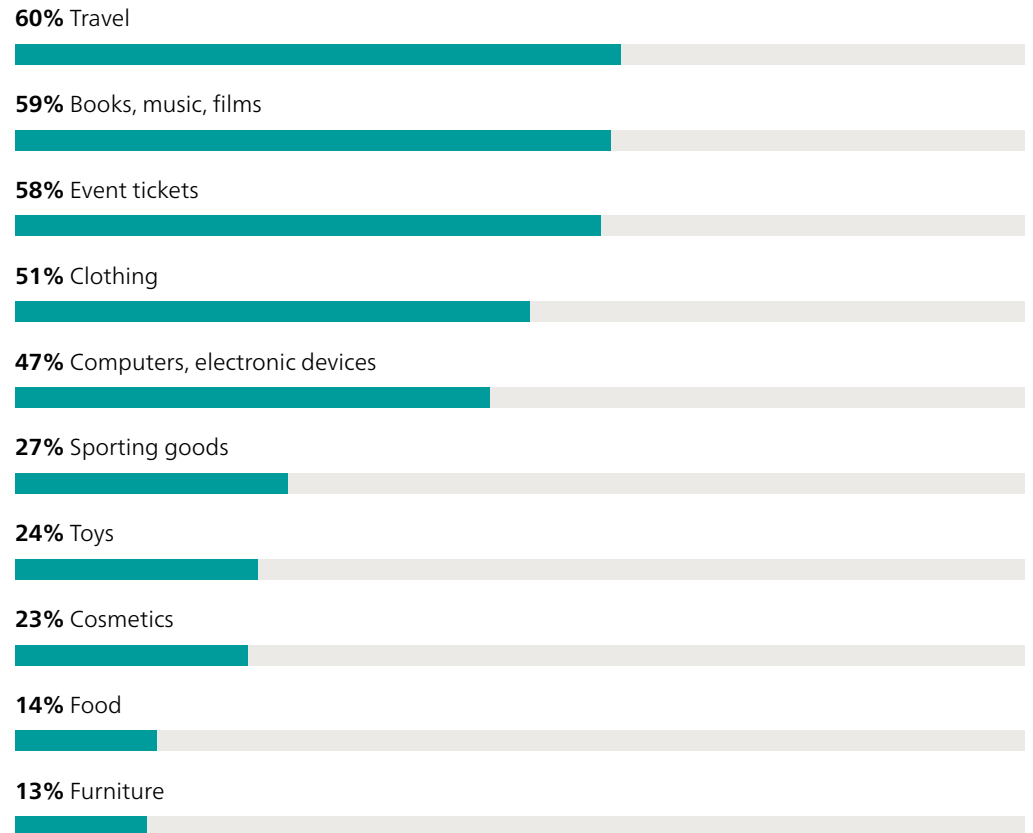
1% Voice (Alexa, etc.)

22% Other

Orders

What products do you buy most often online?

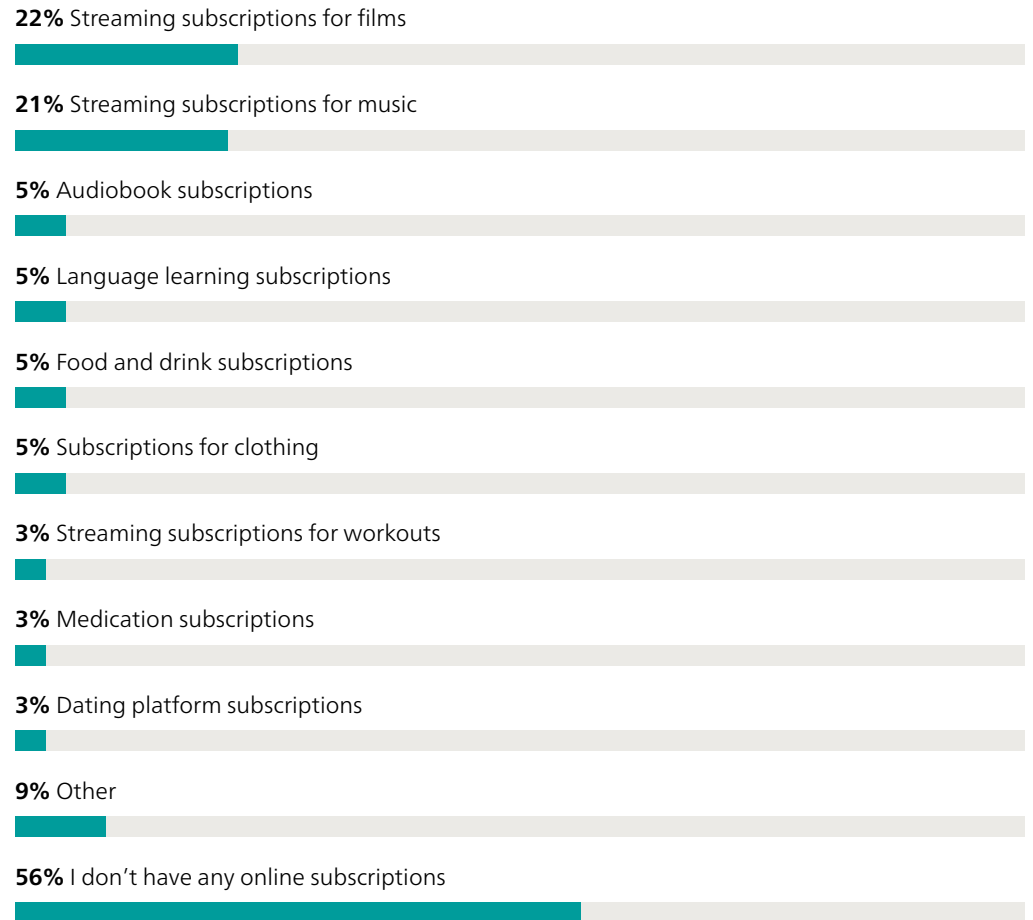
Trips and entertainment are predominantly purchased online.



Orders

Which of the following product or service subscriptions do you have online?

The most popular subscriptions are for film and music streaming services. More than half of respondents do not have any online subscriptions. This figure is 70% for over 65s, and 31% for under 35s.



Orders

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

Nearly half of all respondents use their smartphone or tablet to look for product information.

Smartphone

48% Search for information on products



32% Purchasing products/services online



25% Tracking, customer service, complaints



Tablet

49% Search for information on products



31% Purchasing products/services online



23% Tracking, customer service, complaints



Orders

... and if not, why?

The main reasons customers cancel an order on their smartphone are a poor overview of products, and the fact it is not possible to make the products large enough on the screen.

Smartphone

50% No overview of the entire product range



50% The displays are too small for viewing products



48% Entering information when purchasing online is too cumbersome



43% No mobile optimization of online shops



34% Security concerns



Tablet

31% Entering information when purchasing online is too cumbersome



27% No mobile optimization of online shops



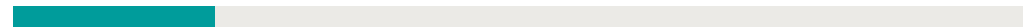
25% No overview of the entire product range



25% The displays are too small for viewing products



20% Security concerns



Orders

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

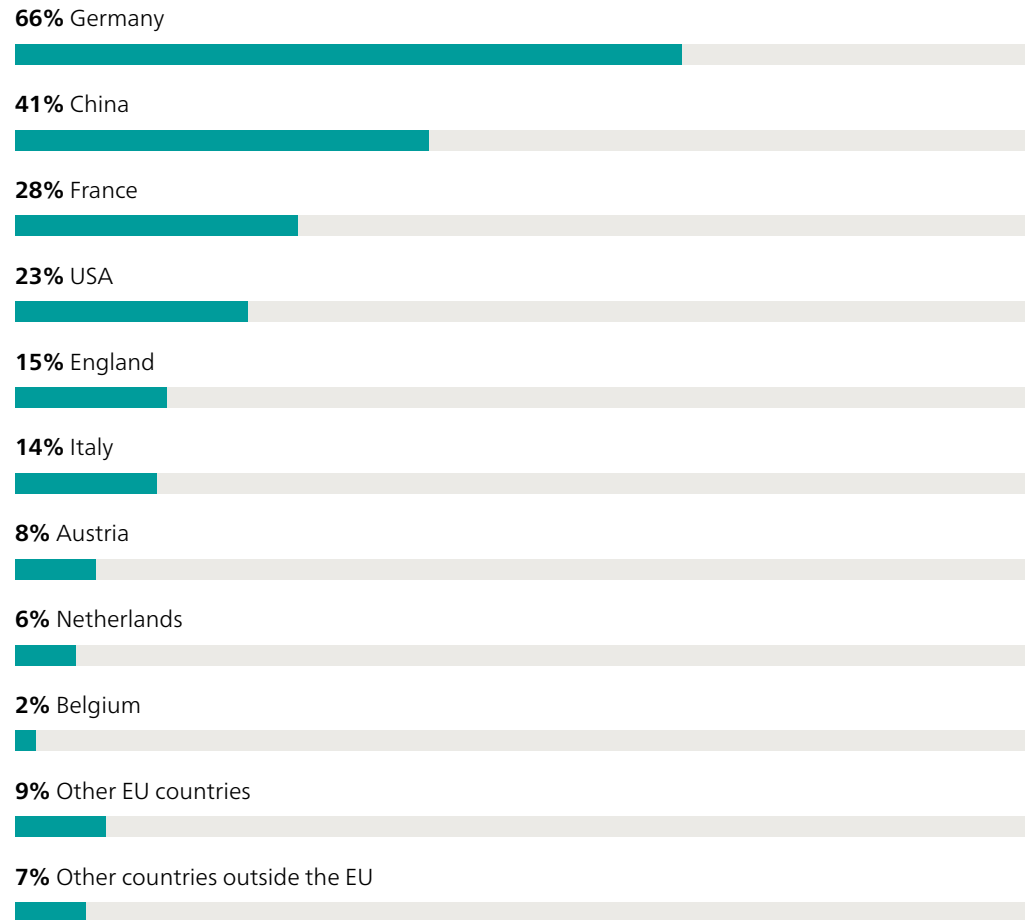
Around two thirds of those surveyed would prefer to purchase directly from the manufacturer, rather than through a retailer or marketplace.



Orders

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

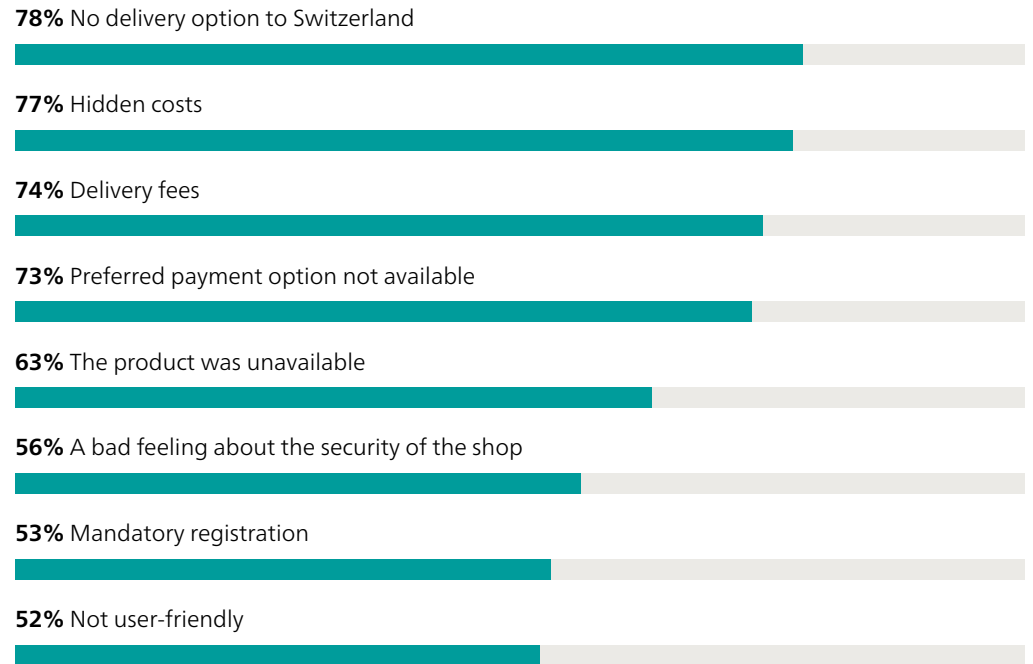
66 percent have purchased from German online shops in the last twelve months, 41 percent from China.



Orders

What are the various reasons for cancelling an online order?

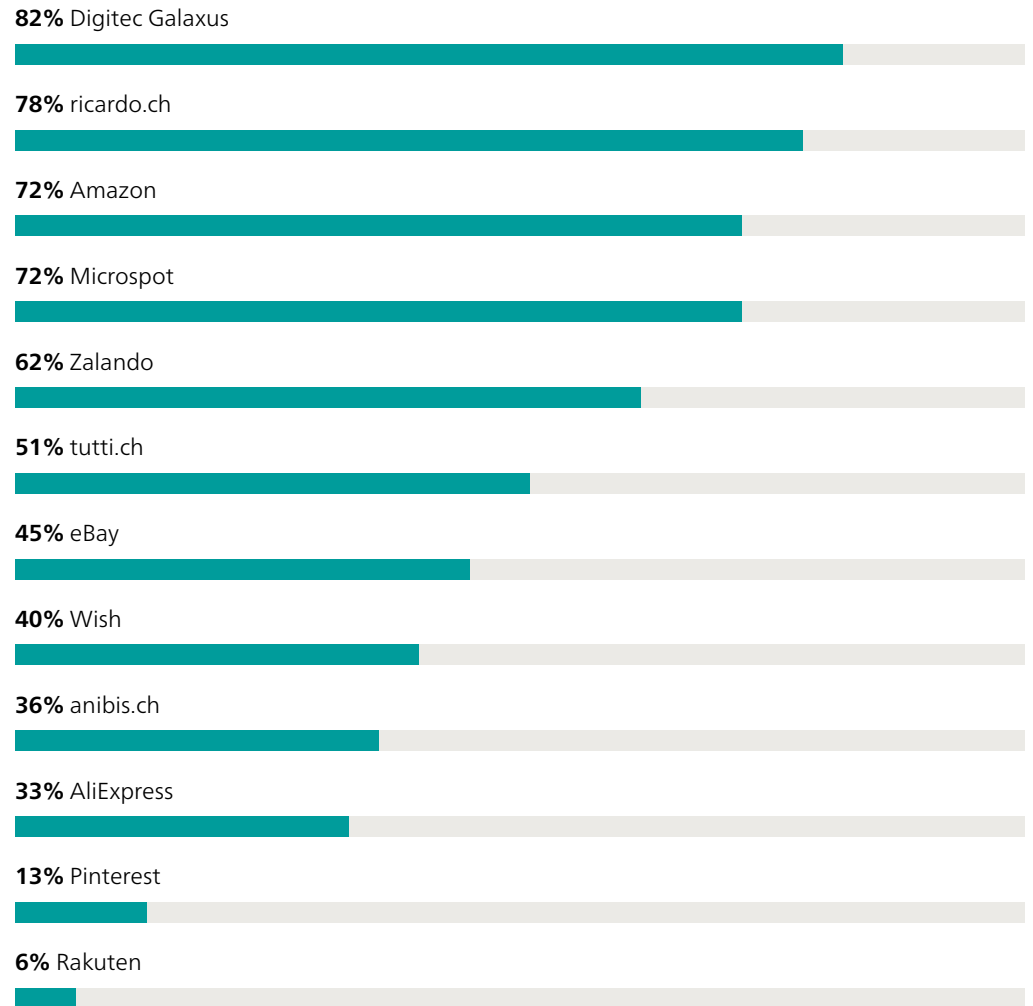
The main reasons for cancelling the order process are no delivery to Switzerland and hidden costs.



Virtual marketplaces

On which of the following virtual marketplaces do you shop?

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



Virtual marketplaces

What are the reasons you shop on virtual marketplaces?

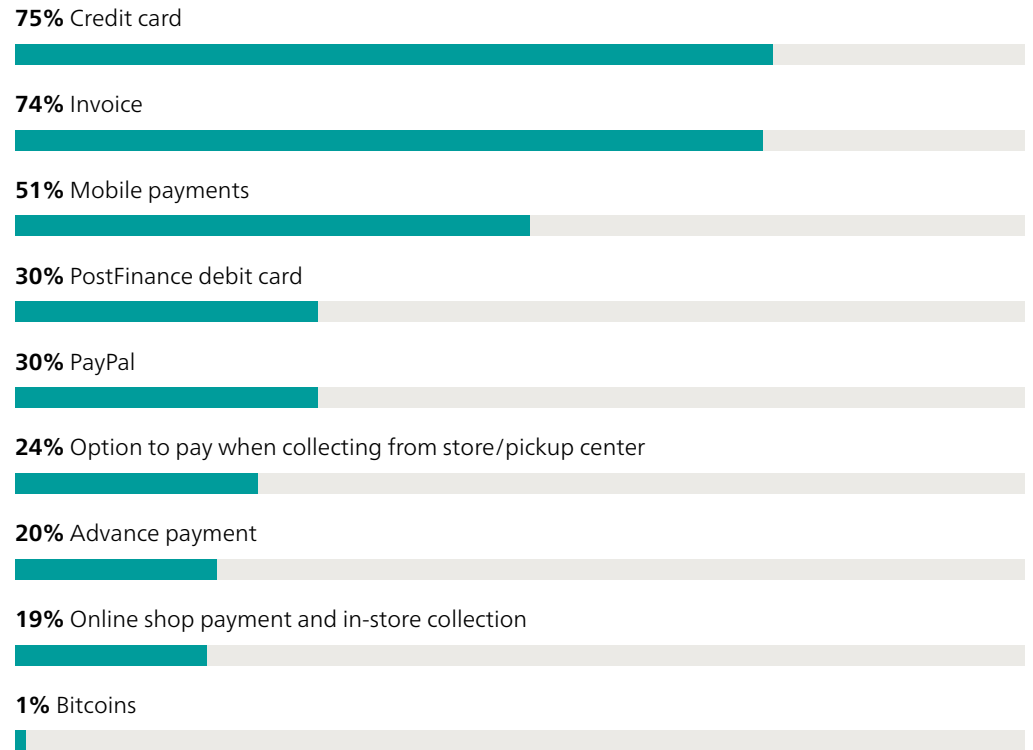
Virtual marketplaces primarily enable the consumer to compare products, prices and retailers.



Payment

Which payment options do you prefer?

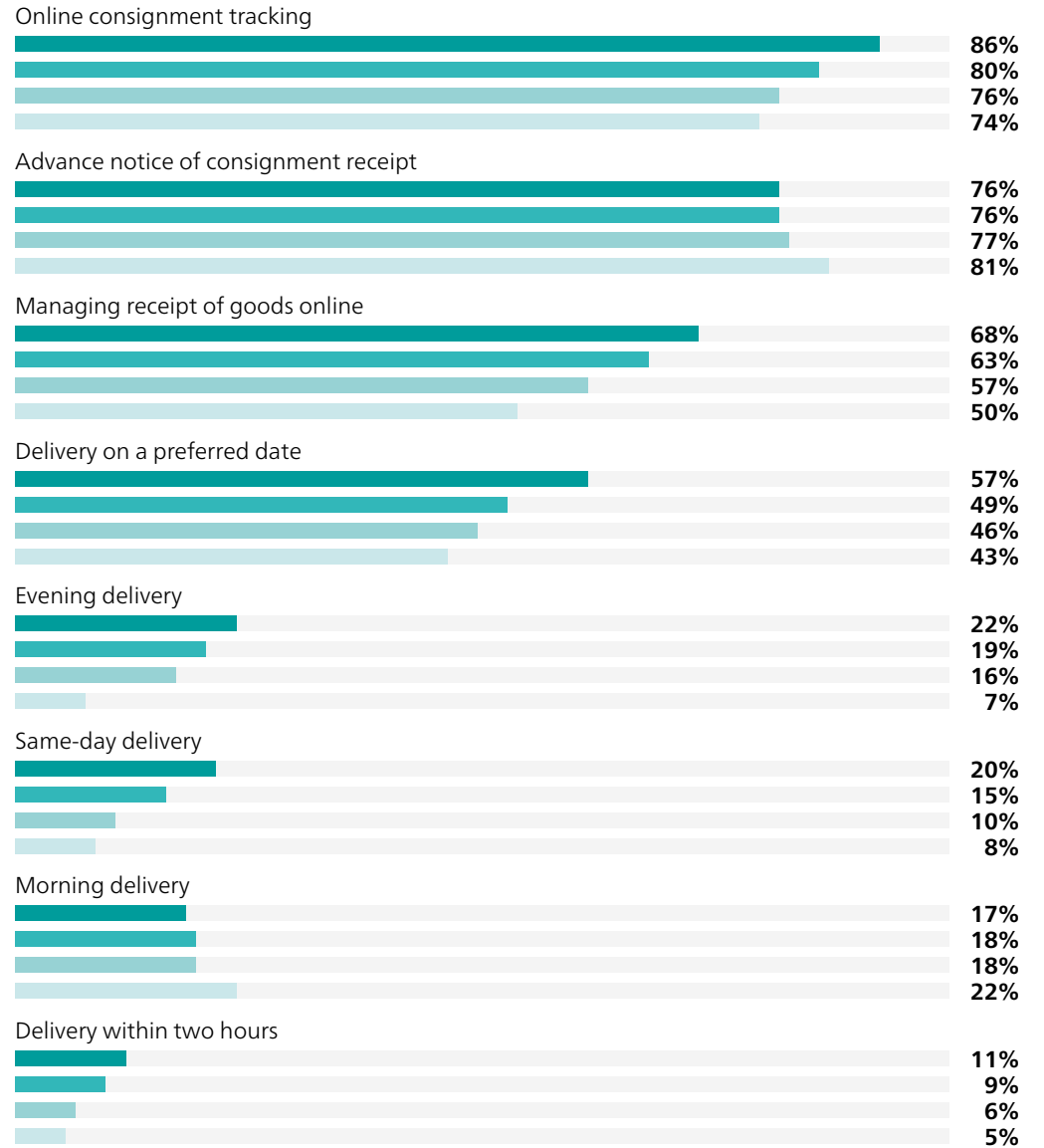
The majority prefer to pay by credit card or by invoice.



Logistics and sustainability

How important are the following delivery options to you?

The most important delivery options to all age groups are tracking the delivery online and advance notice of receipt.



● up to 34 years ● from 35 to 54 years of age ● from 55 to 64 years of age ● 65 years and older

Logistics and sustainability

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

44% Carbon-neutral shipping (through carbon offsetting) without any extra charge

34% Use of locally adapted logistics solutions for more sustainable shipping (e.g. bicycle delivery services in combination with trains, eCargo bikes)

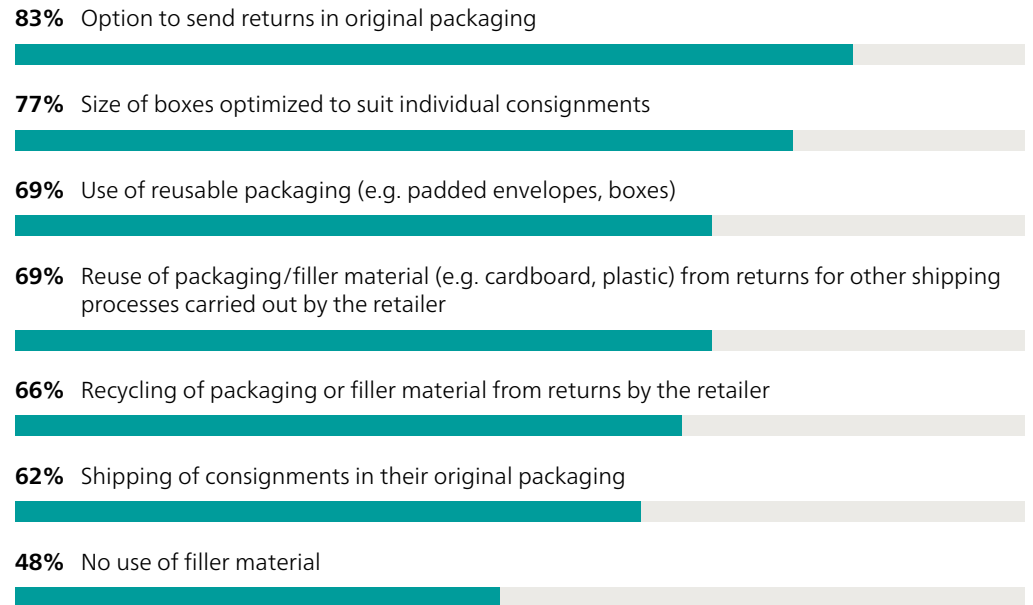
33% Slower delivery of consignments to ensure more sustainable delivery

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

Logistics and sustainability

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

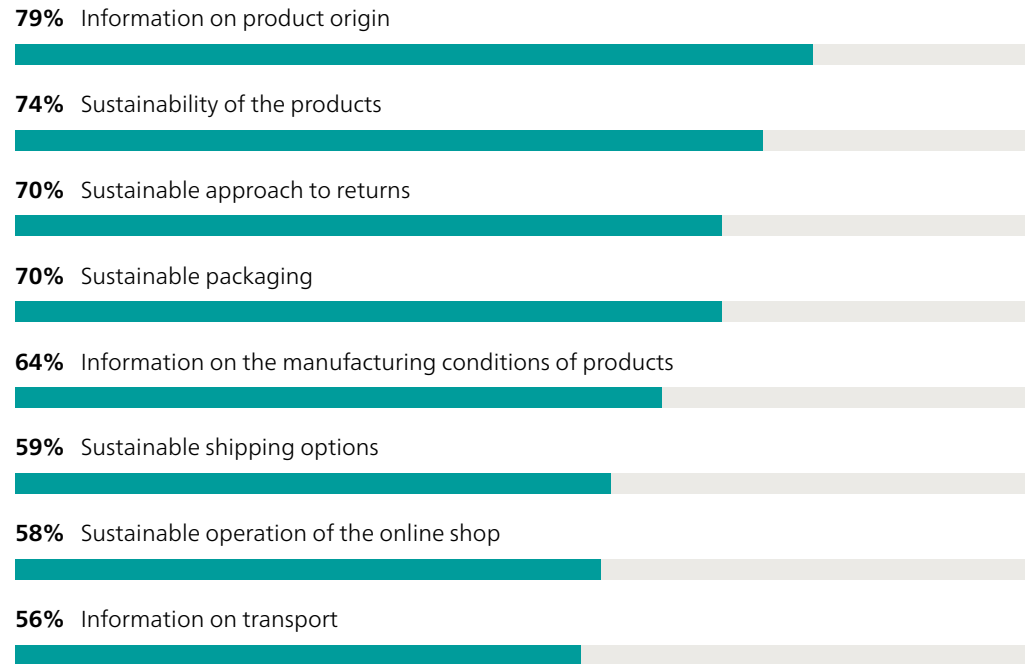
Retailers can impress their customers with returns in the same packaging, customized packages and reusable packaging.



Logistics and sustainability

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

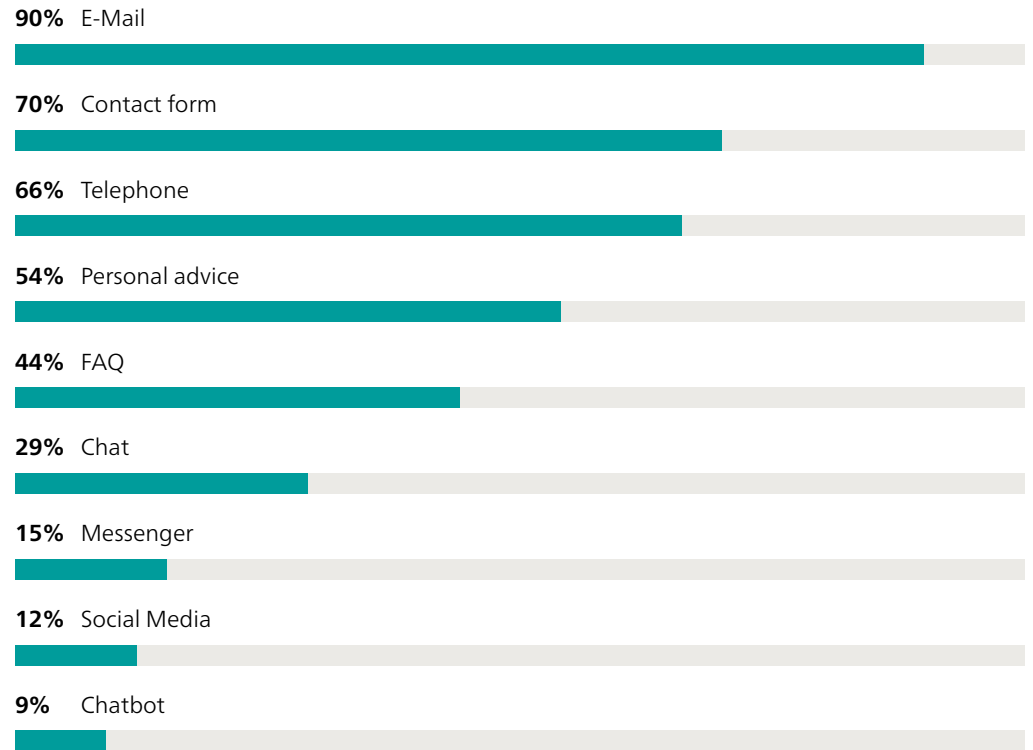
79% would like to have transparency with regard to product origin.



Customer care

What types of customer service are important to you?

In terms of customer service, respondents rate e-mails (90%) as important. Compared with the previous year, this figure has risen by 19%.



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. 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

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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 to the HWZ Institute for Digital Business, it actively supports transformation in digital business as well as knowledge transfer and generation.

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