

2022 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 2022 via a quantitative online questionnaire. Over 12,000 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 28 closed questions and was divided according to the value or process chain in e-commerce into the areas of marketing, orders, virtual marketplaces, payment, logistics and sustainability, returns and customer service.

The questions on marketing and ordering mainly focused on the frequency of online purchases, the reasons for online shopping, the preferred product categories purchased online and shopping on virtual marketplaces. 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 preferred options and processes were analysed in relation to returns. 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 2022. For economic research reasons and in order to reach the greatest number of potential study participants, 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 produced a total sample of 18,233 participants. The completion rate stood at around 70%, and the median time taken to complete the questionnaire was 11 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 12,163 participants.

Study design

An overview of the study



Sample size

12,163 participants (cleaned)



Survey period

16 to 29 May 2022



Method

Quantitative online survey



Questions

28 closed questions

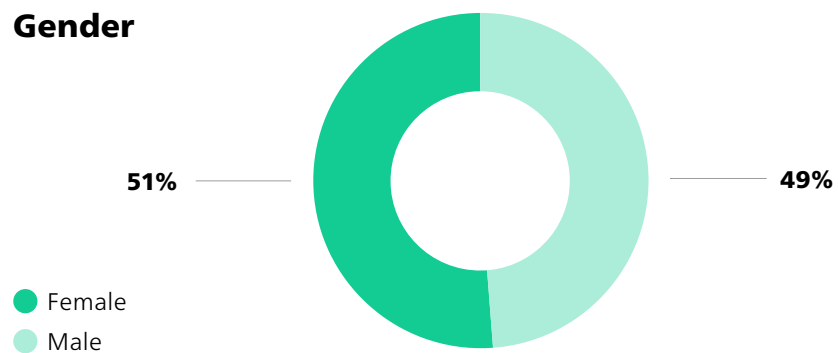
Study design

Statistical data

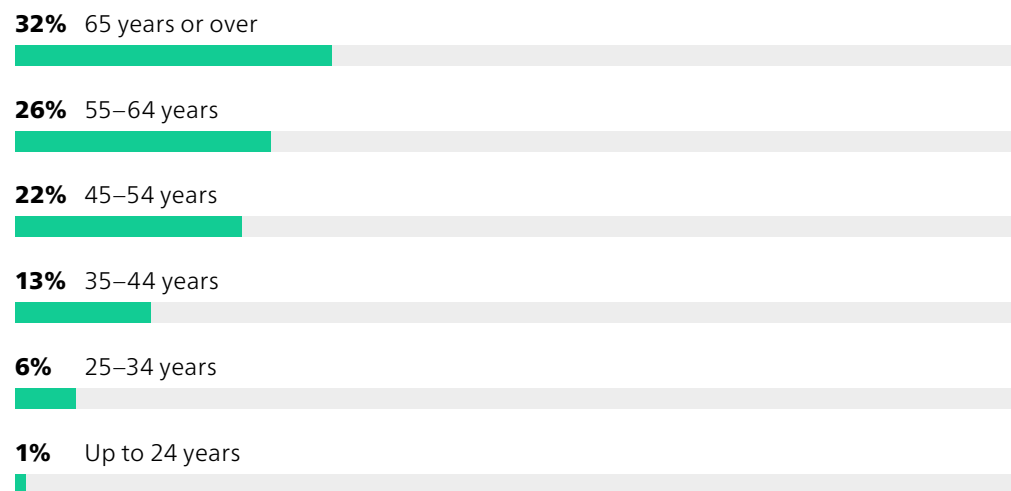
Language



Gender



Age

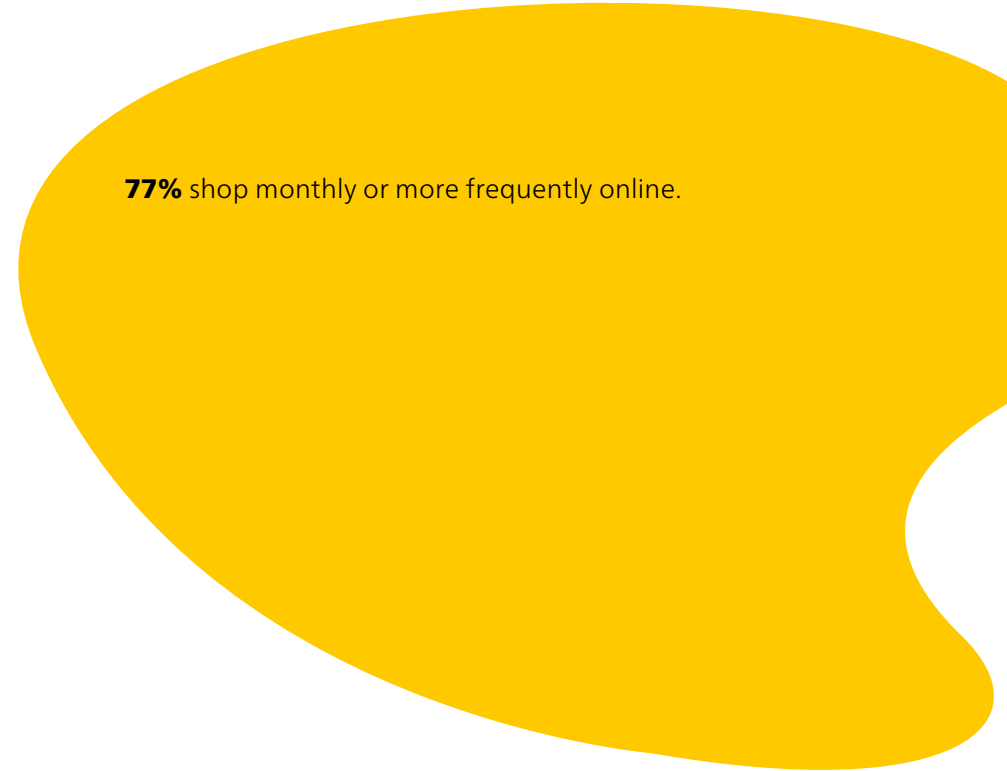
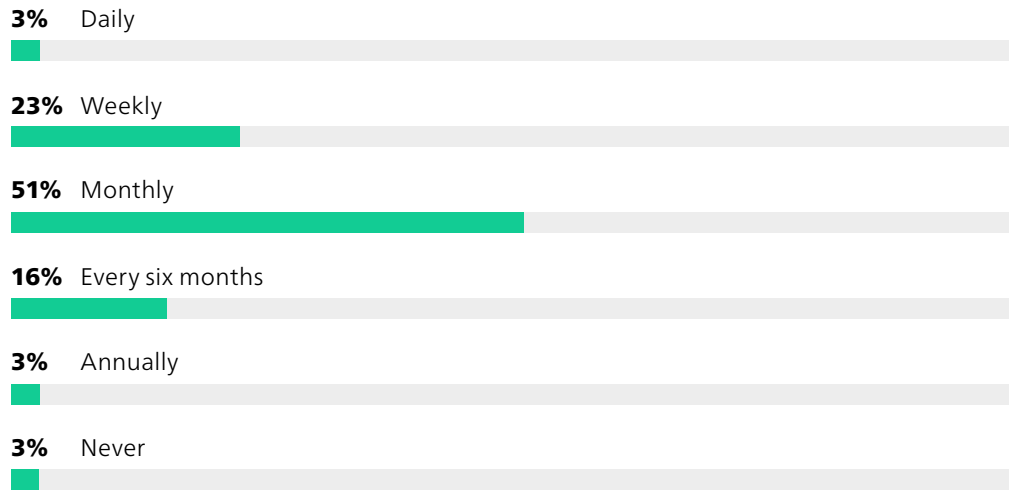


Overview of topics

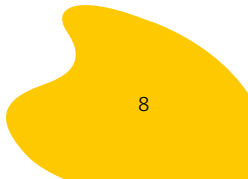
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Marketing

How often do you shop online?

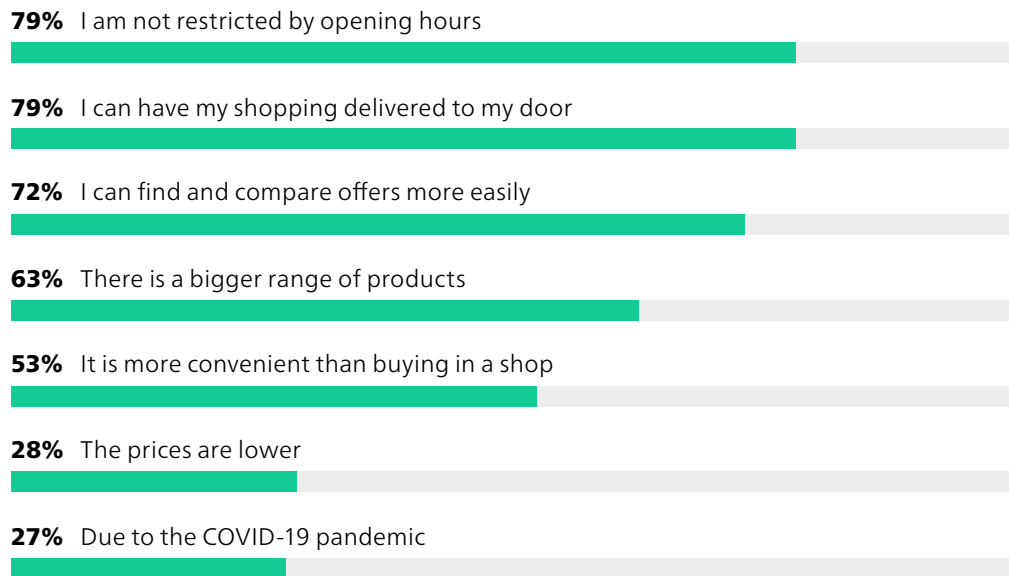


77% shop monthly or more frequently online.



Marketing

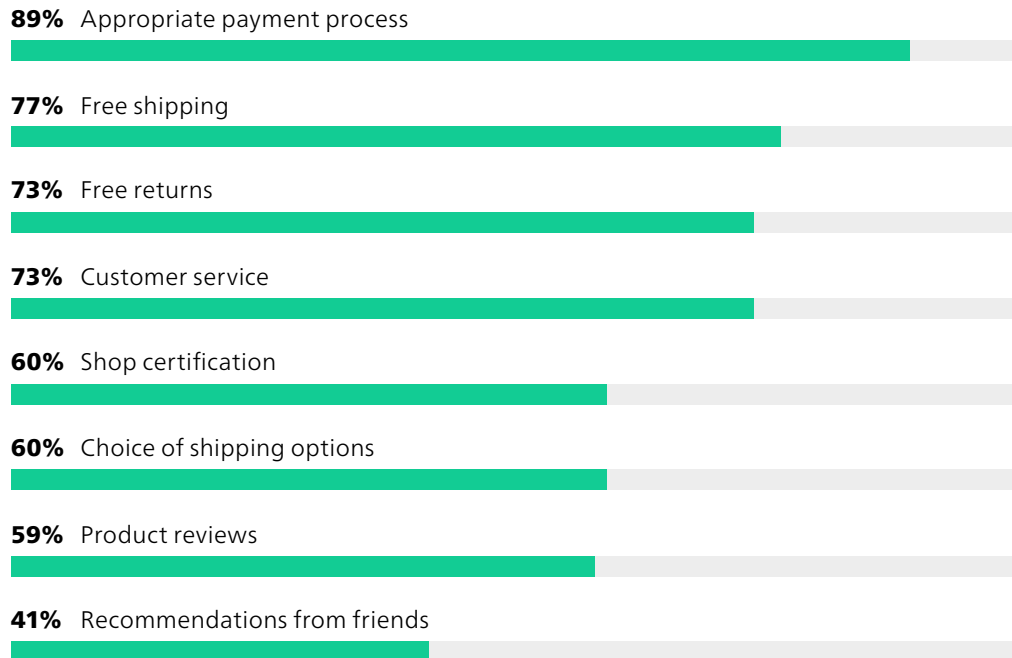
Why do you shop online?



79% of respondents appreciate the flexibility of time afforded by shopping online and the fact that purchases are delivered to their homes.

Marketing

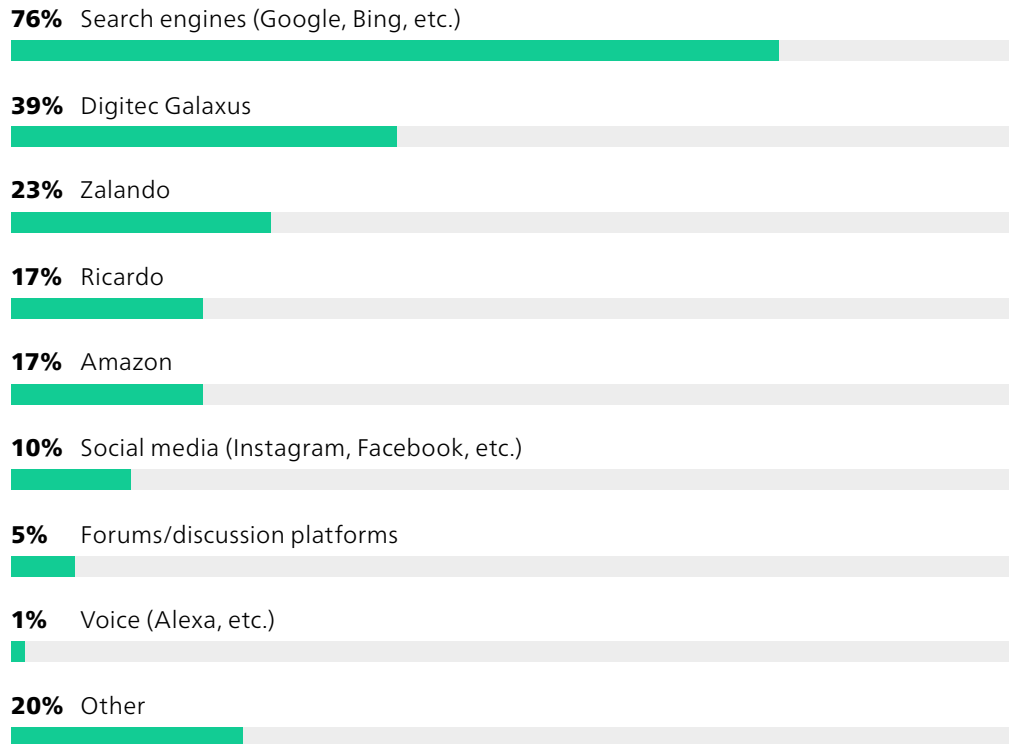
How important are the following criteria to you when shopping online?



Overall, criteria such as appropriate payment processing (**89%**) and free shipping (**77%**) are most important to respondents.

Marketing

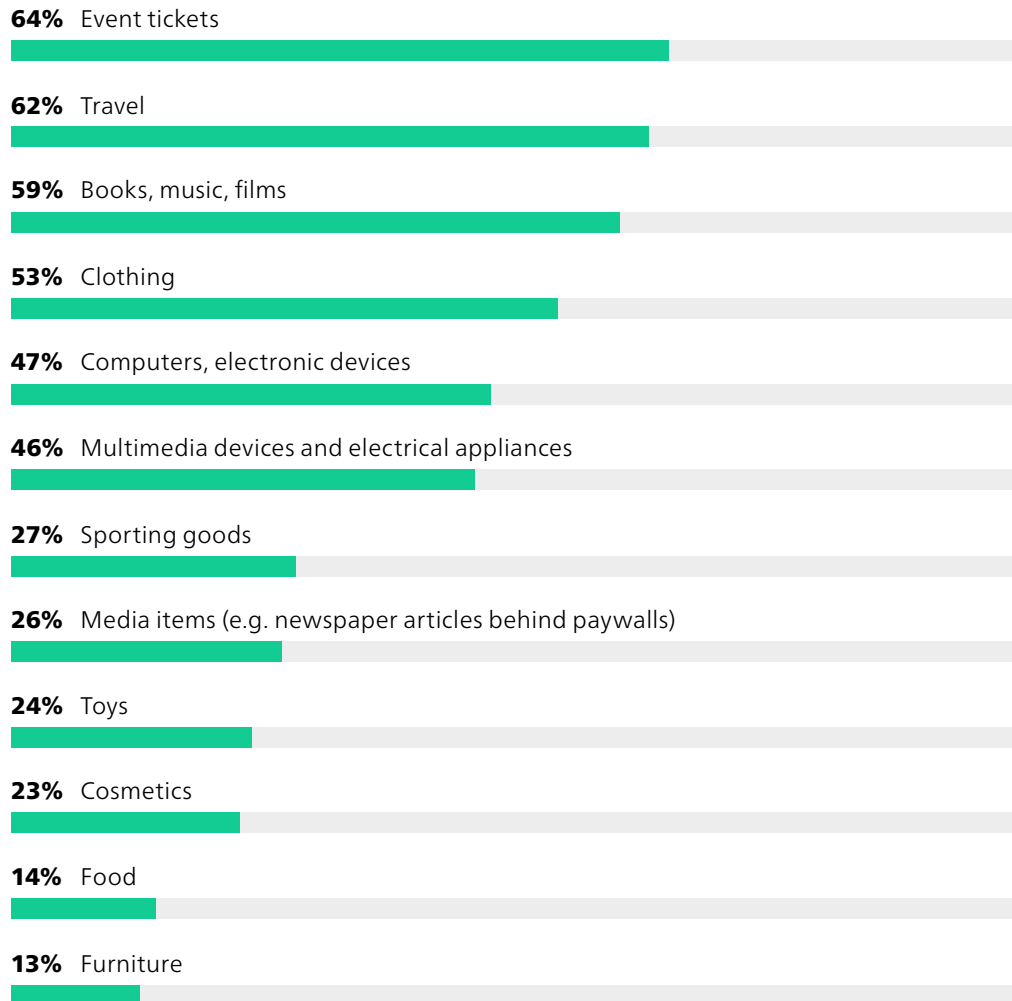
Where are you most likely to start your product search when shopping online?



76% begin their product search on search engines when shopping online. The platforms Digitec/Galaxus (**39%**) and Zalando (**23%**) are even more popular than in the previous year.

Orders

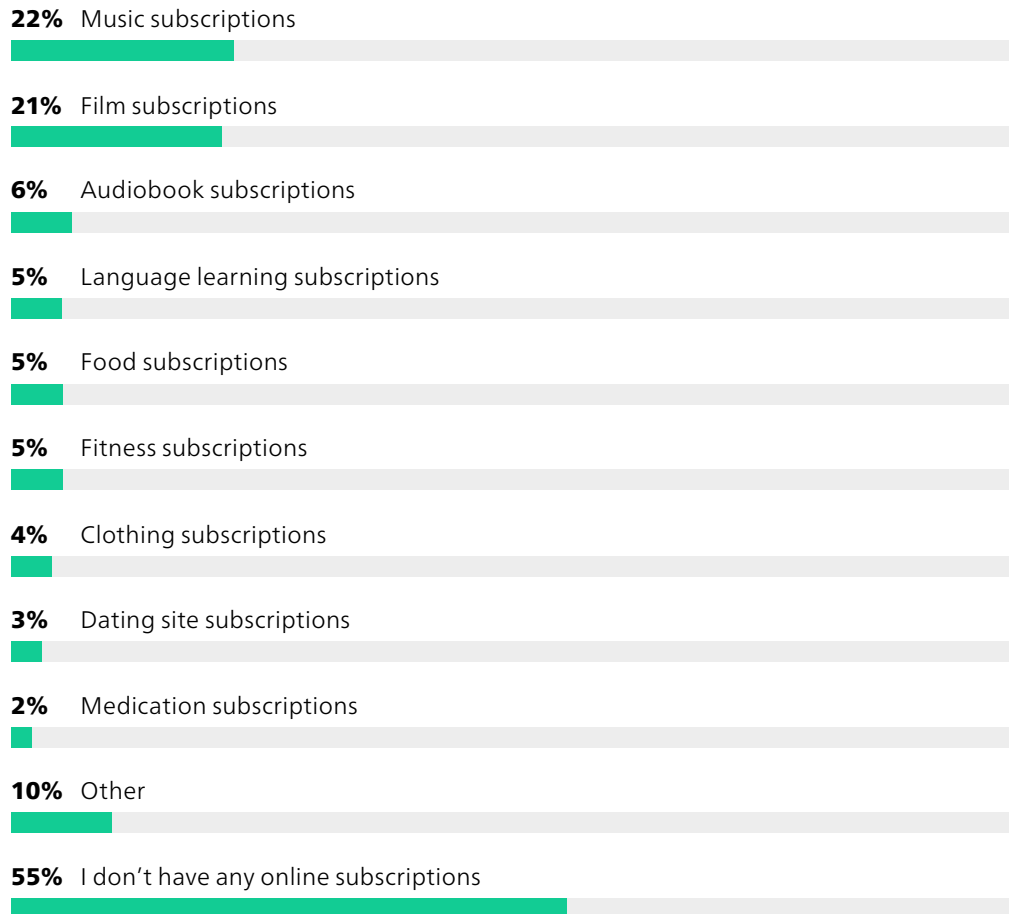
What products do you buy most often online?



There is an increase in event tickets purchased online, particularly compared with the previous year.

Orders

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

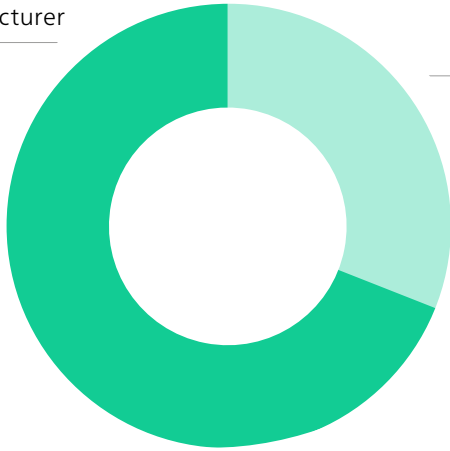


The most popular subscriptions are for film and music streaming services. More than half of respondents do not have any online subscriptions. This figure is **71%** for over 65s, and **29%** for under 35s.

Orders

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

68% Product manufacturer

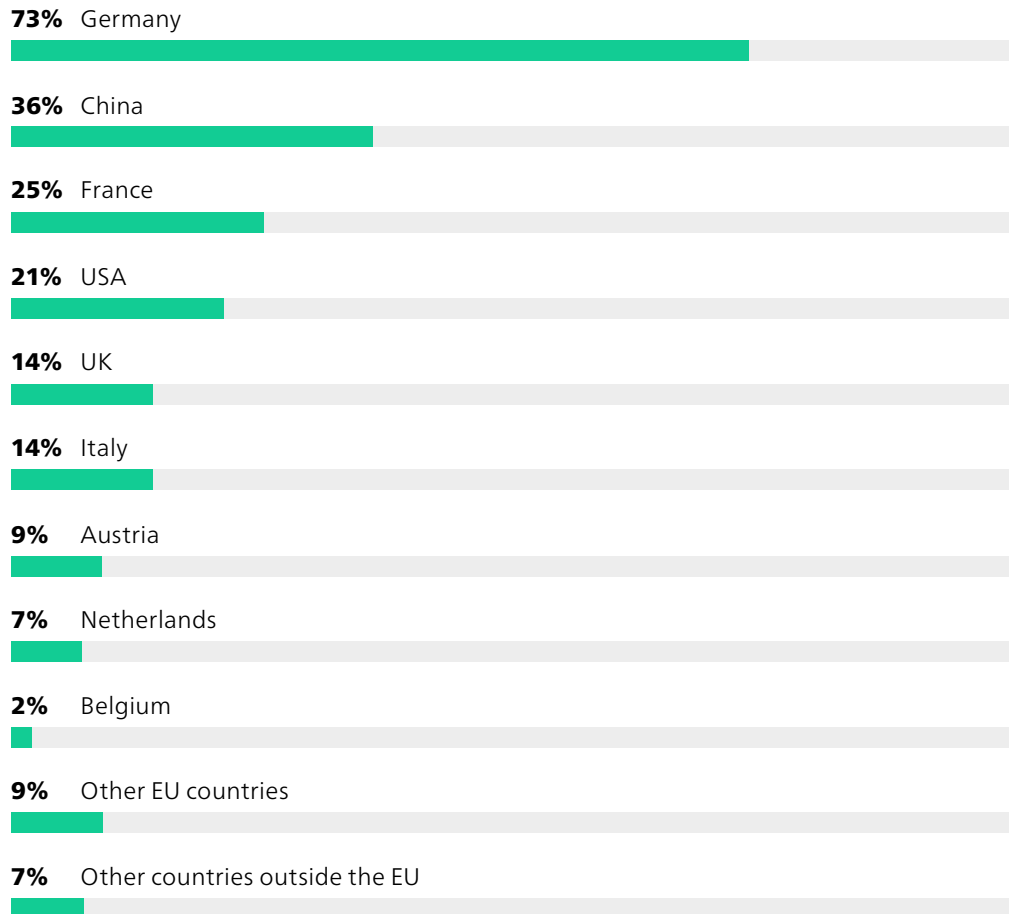


32% Retailer or
virtual marketplace

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

Orders

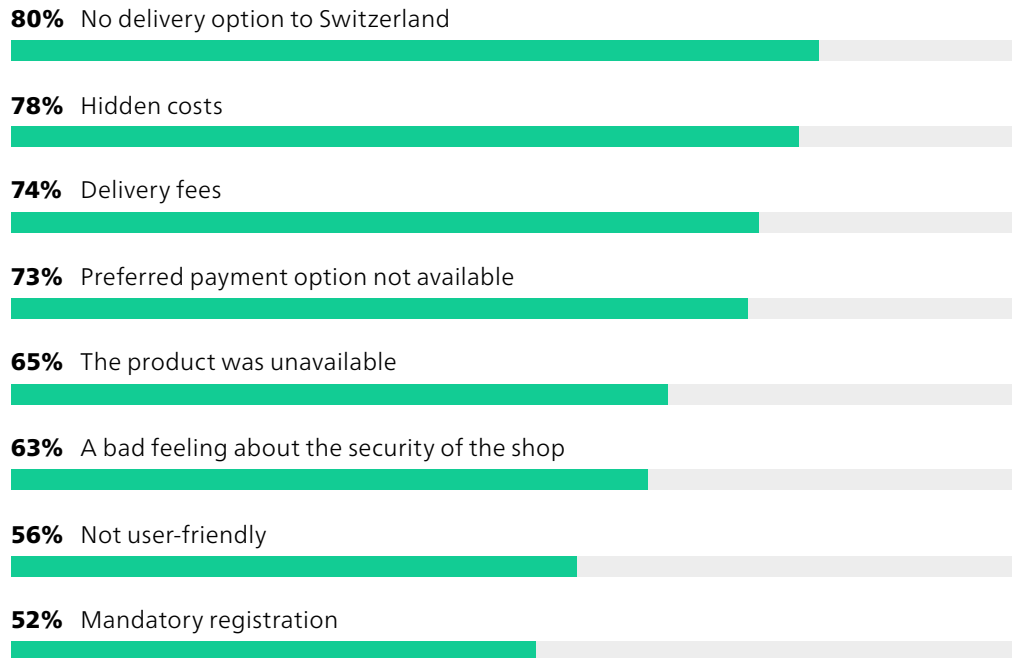
In which countries are the online shops based that you have used to make purchases in the past 12 months?



73% have purchased from German online shops in the last twelve months, **36%** from China.

Orders

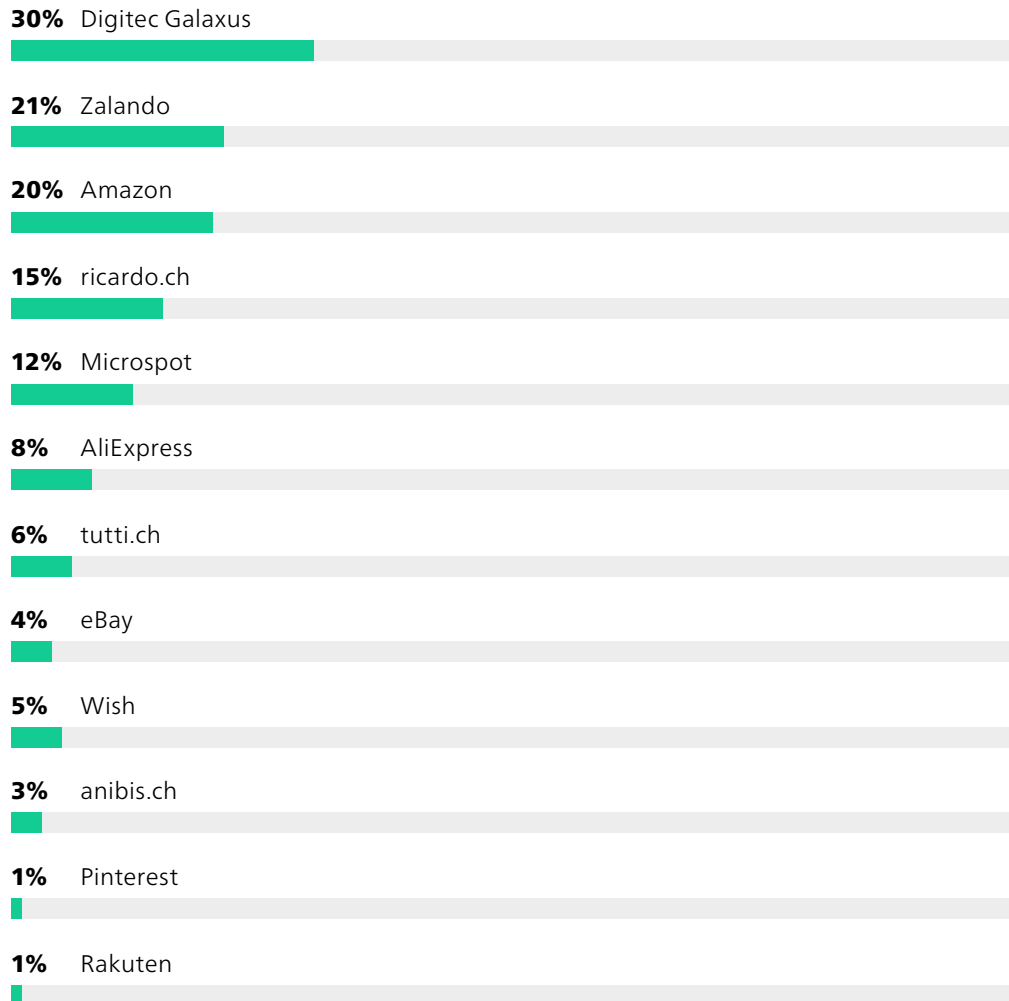
What are the reasons for cancelling an online order?



The main reasons for cancelling the order process are no delivery to Switzerland (**80%**) and hidden costs (**78%**).

Virtual marketplaces

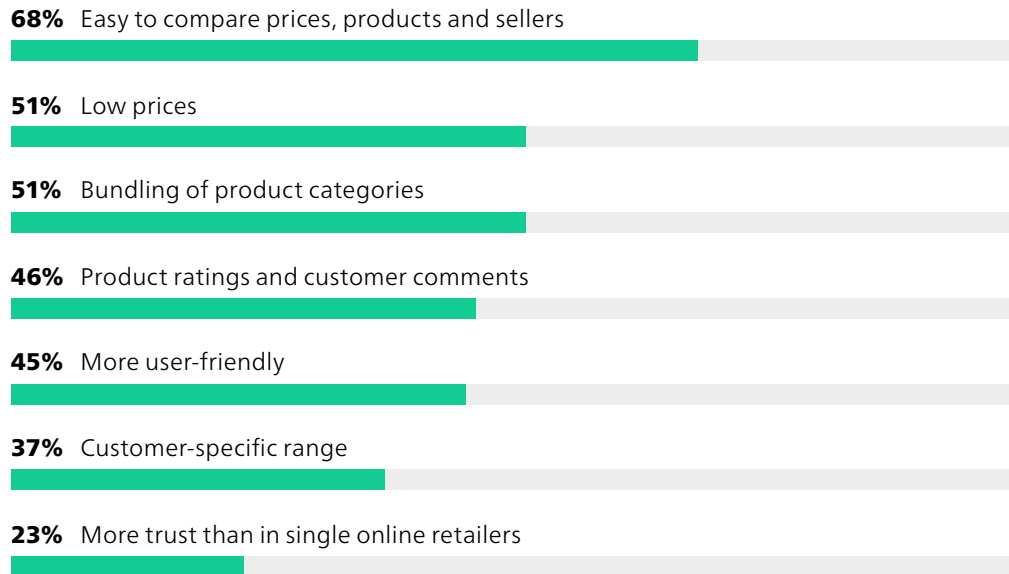
On which of the following virtual marketplaces do you shop?



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

Virtual marketplaces

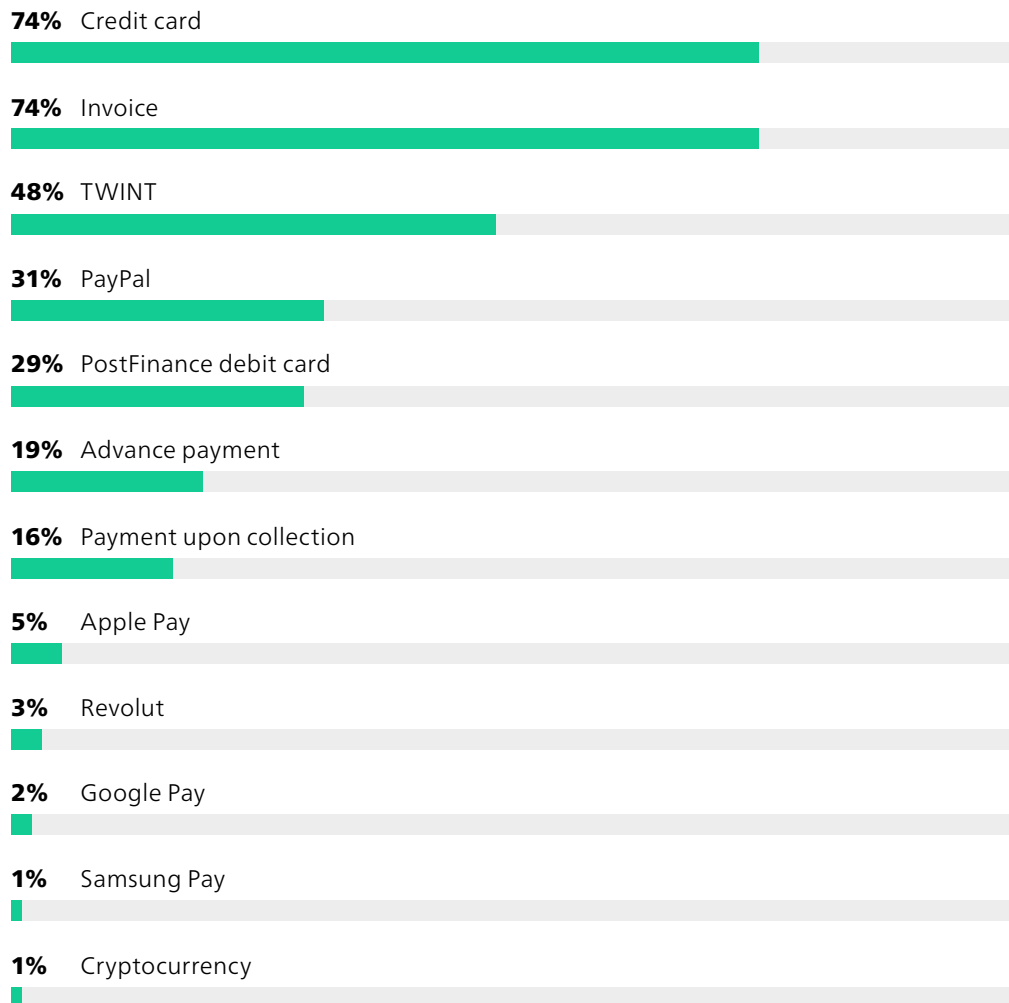
What are the reasons why you shop on virtual marketplaces?



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

Payment

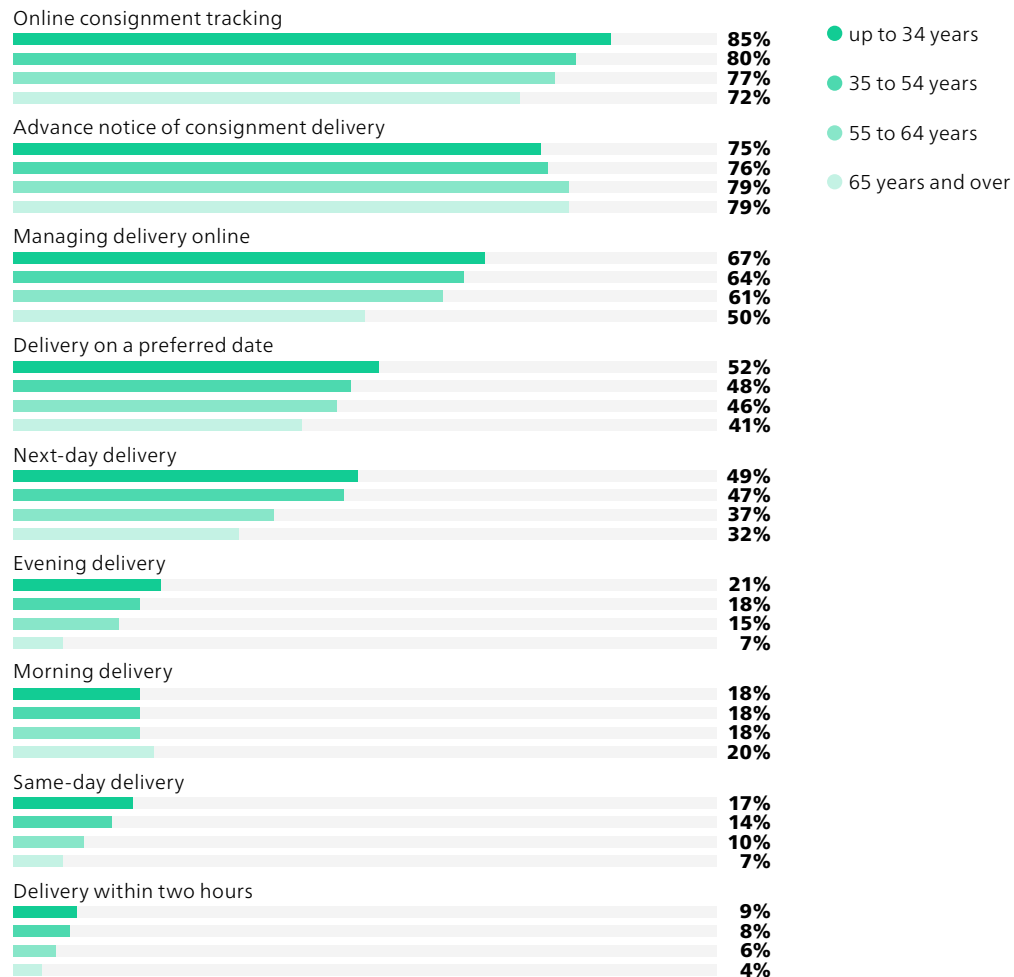
Which payment options do you prefer?



The majority prefer to pay by credit card or invoice. **48%** prefer to pay with TWINT, which equates to **8%** more than in the previous year.

Logistics and sustainability

How important are the following delivery options to you?



The most important delivery options for all age groups are the ability to track delivery online and advance notice of delivery.

Logistics and sustainability

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

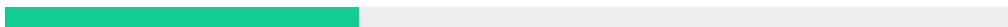
56% Consolidated shipping (bundling of multiple purchases) for more sustainable delivery



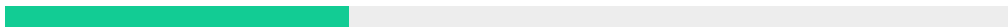
48% Carbon-neutral shipping (through carbon offsetting) without any extra charge



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



34% Slower delivery of consignments to ensure more sustainable delivery



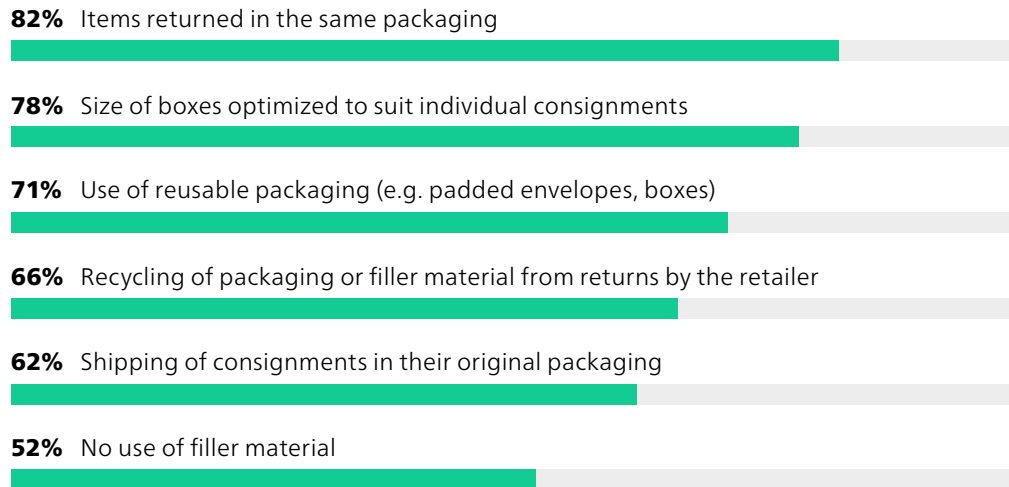
28% Carbon-neutral shipping (through carbon offsetting) with an extra charge



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

Logistics and sustainability

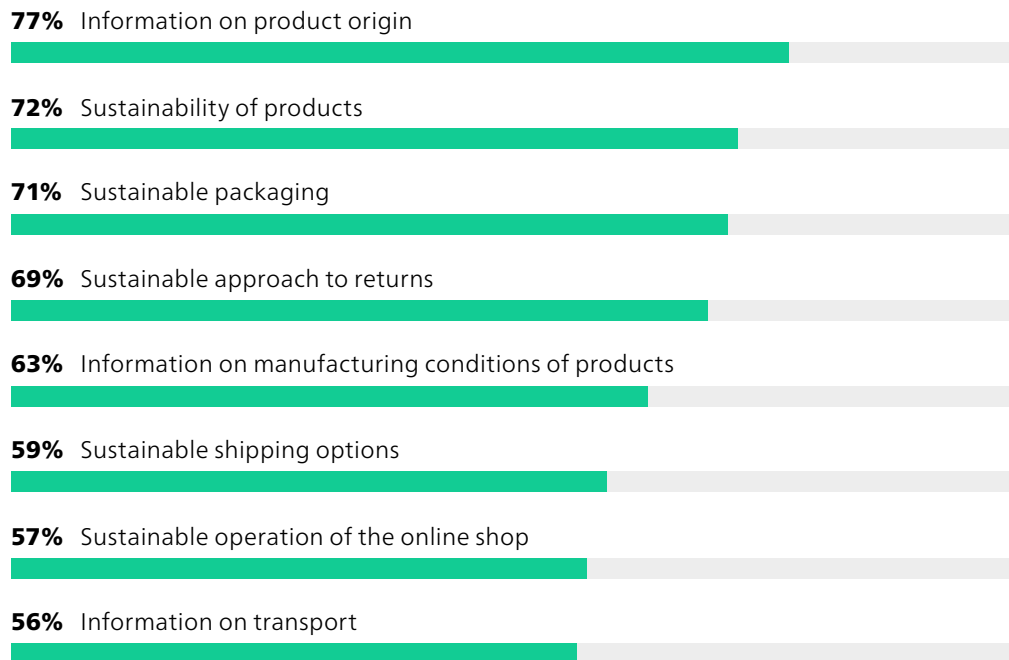
How important to you are the following aspects regarding the packaging of the ordered goods?



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

Logistics and sustainability

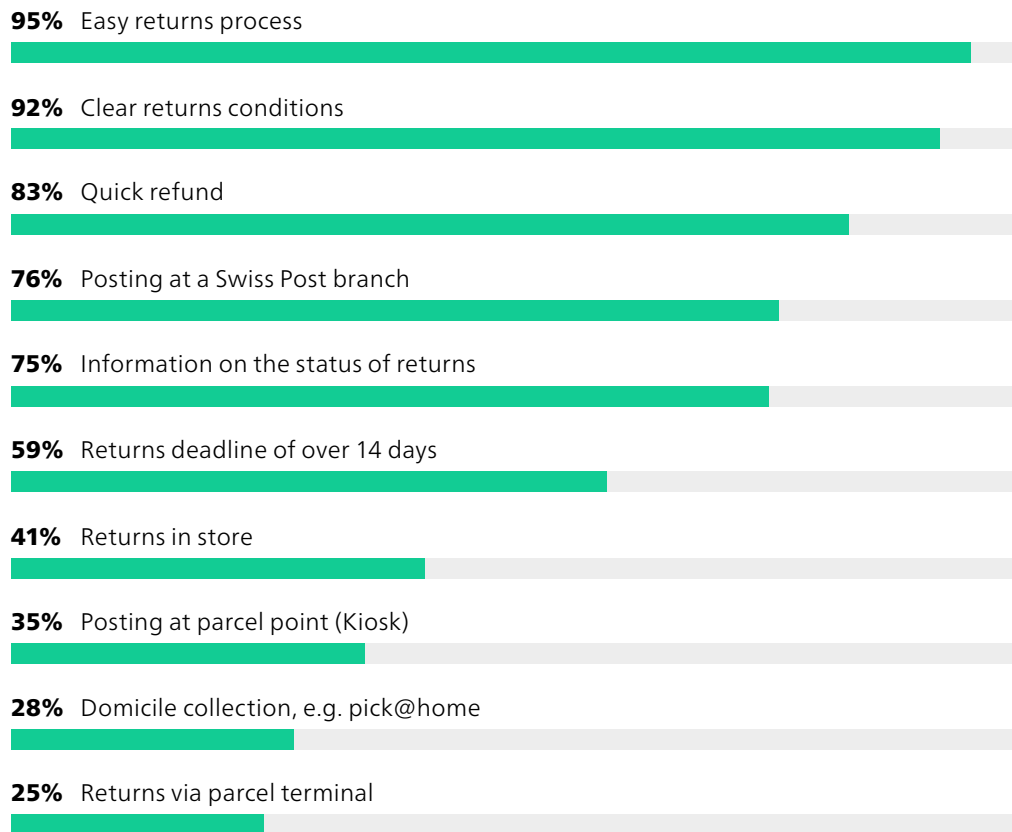
How important are the following sustainability aspects to you when shopping online?



77% would like to have transparency with regard to product origin.

Returns

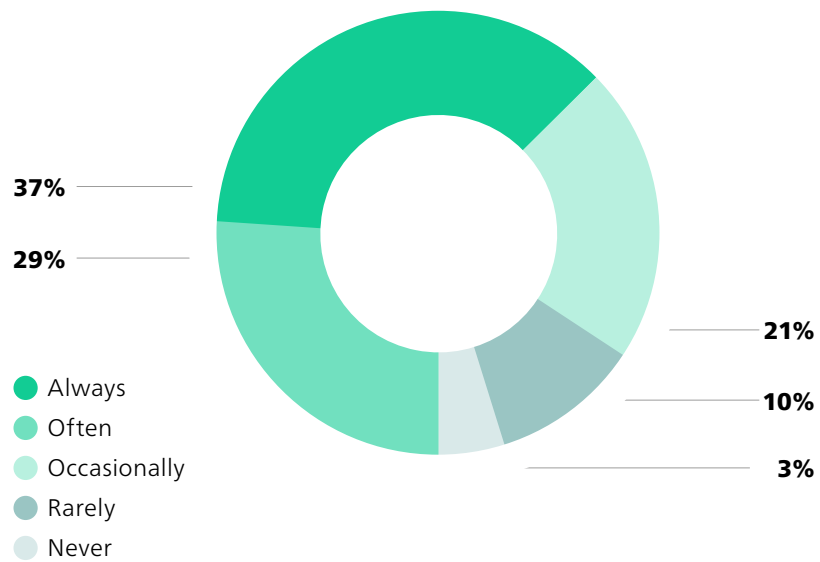
How important are the following return options to you?



Simplicity (**95%**) and transparency (**92%**) are the key requirements for returns. **83%** consider a rapid refund important.

Returns

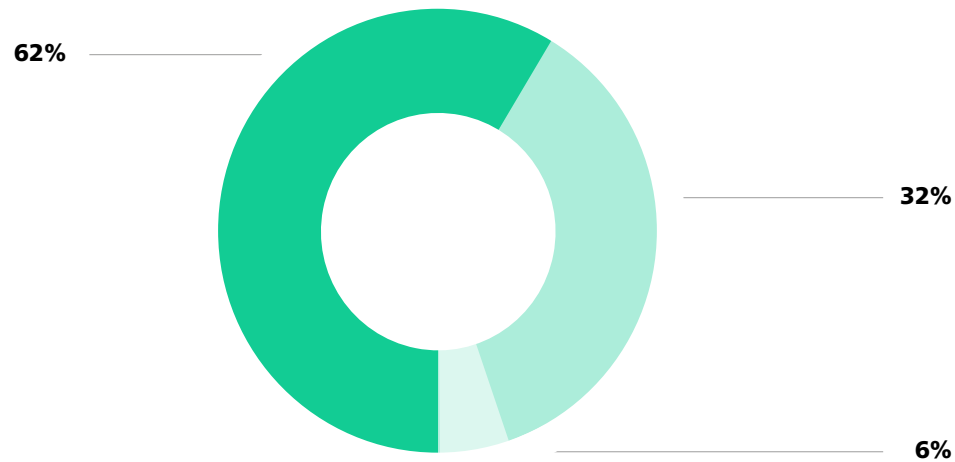
Do you check the online shop's conditions for returns before ordering?



Over half of those surveyed often or always check the conditions for returning items.

Returns

Which returns process do you prefer?

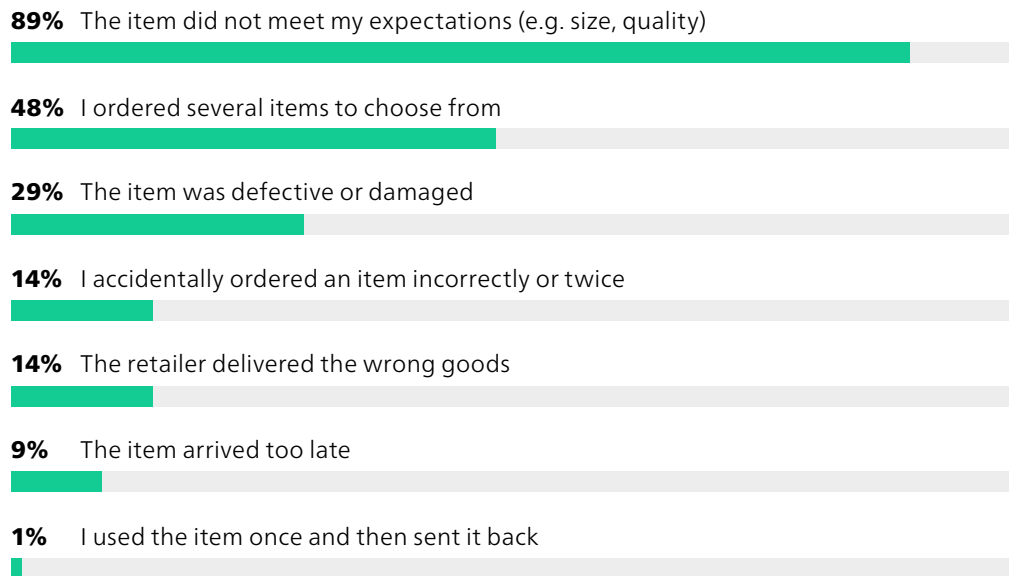


- Solely physical returns process (return note and label enclosed with consignment)
- Digital and physical, e.g. registration of returns via app, with label print-out
- Solely digital returns process (paperless), e.g. processing via a customer portal

62% of respondents prefer a purely physical returns process.

Returns

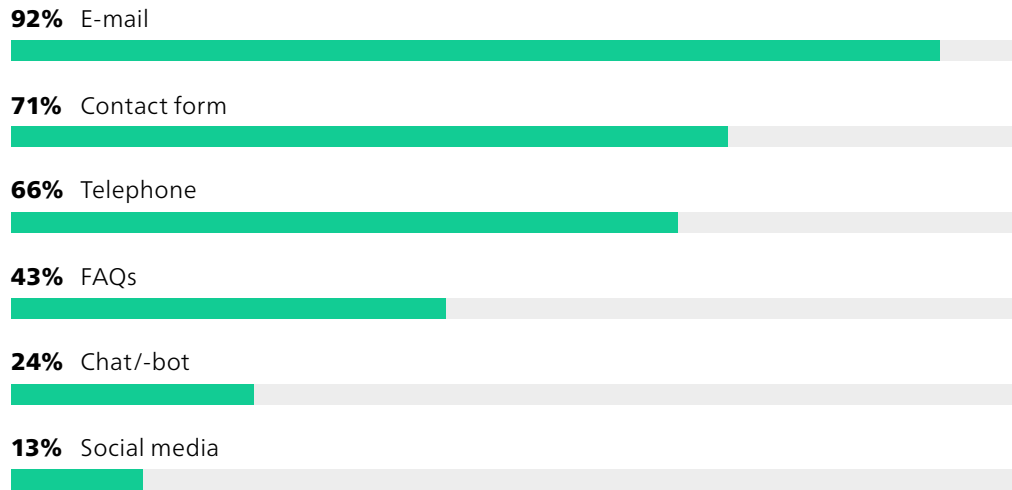
What are the most common reasons for returning goods?



By a considerable margin, the most common reason for returns is that the item did not meet expectations.

Customer service

What types of customer service are important to you?



In terms of customer service, respondents consider e-mails **(92%)** to be important.

Institute for Digital Business

University of Applied Sciences in
Business Administration Zurich

The Institute for Digital Business at Zurich University of Applied Sciences in Business Administration (HWZ) is a Switzerland-wide center of excellence for digital transformation and new disciplines in economics, law and society. It provides relevant, application-oriented input in the form of continuing education, training, publications, consultations and studies, with the aim of having a positive impact on Switzerland's digital transformation. The e-commerce trend indicator is methodically conducted and supported by the HWZ Institute for Strategic Management: Stakeholder View.

More information can be found at:

www.fh-hwz.ch/idb

www.hwzdigital.ch

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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.

More information at:

www.swisspost.ch/digital-commerce

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