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**
- German: 71%
- French: 22%
- Italian: 7%

**Gender**
- Female: 51%
- Male: 49%

**Age**
- 32% 65 years or over
- 26% 55–64 years
- 22% 45–54 years
- 13% 35–44 years
- 6% 25–34 years
- 1% Up to 24 years
## Overview of topics

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing</td>
<td>8</td>
</tr>
<tr>
<td>Orders</td>
<td>12</td>
</tr>
<tr>
<td>Virtual marketplaces</td>
<td>17</td>
</tr>
<tr>
<td>Payment</td>
<td>19</td>
</tr>
<tr>
<td>Logistics and sustainability</td>
<td>20</td>
</tr>
<tr>
<td>Returns</td>
<td>24</td>
</tr>
<tr>
<td>Customer support</td>
<td>28</td>
</tr>
</tbody>
</table>

© 2022 Post CH Ltd | Swiss e-commerce trend indicator 2022
### Marketing

**How often do you shop online?**

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily</td>
<td>3%</td>
</tr>
<tr>
<td>Weekly</td>
<td>23%</td>
</tr>
<tr>
<td>Monthly</td>
<td>51%</td>
</tr>
<tr>
<td>Every six months</td>
<td>16%</td>
</tr>
<tr>
<td>Annually</td>
<td>3%</td>
</tr>
<tr>
<td>Never</td>
<td>3%</td>
</tr>
</tbody>
</table>

*77% shop monthly or more frequently online.*
Marketing
Why do you shop online?

79% I am not restricted by opening hours
79% I can have my shopping delivered to my door
72% I can find and compare offers more easily
63% There is a bigger range of products
53% It is more convenient than buying in a shop
28% The prices are lower
27% Due to the COVID-19 pandemic

79% of respondents appreciate the flexibility of time afforded by shopping online and the fact that purchases are delivered to their homes.
How important are the following criteria to you when shopping online?

- **89%** Appropriate payment process
- **77%** Free shipping
- **73%** Free returns
- **73%** Customer service
- **60%** Shop certification
- **60%** Choice of shipping options
- **59%** Product reviews
- **41%** Recommendations from friends

Overall, criteria such as appropriate payment processing (89%) and free shipping (77%) are most important to respondents.
Where are you most likely to start your product search when shopping online?

- **76%** Search engines (Google, Bing, etc.)
- **39%** Digitec Galaxus
- **23%** Zalando
- **17%** Ricardo
- **17%** Amazon
- **10%** Social media (Instagram, Facebook, etc.)
- **5%** Forums/discussion platforms
- **1%** Voice (Alexa, etc.)
- **20%** Other

**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?

<table>
<thead>
<tr>
<th>Product Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event tickets</td>
<td>64%</td>
</tr>
<tr>
<td>Travel</td>
<td>62%</td>
</tr>
<tr>
<td>Books, music, films</td>
<td>59%</td>
</tr>
<tr>
<td>Clothing</td>
<td>53%</td>
</tr>
<tr>
<td>Computers, electronic devices</td>
<td>47%</td>
</tr>
<tr>
<td>Multimedia devices and electrical appliances</td>
<td>46%</td>
</tr>
<tr>
<td>Sporting goods</td>
<td>27%</td>
</tr>
<tr>
<td>Media items (e.g. newspaper articles behind paywalls)</td>
<td>26%</td>
</tr>
<tr>
<td>Toys</td>
<td>24%</td>
</tr>
<tr>
<td>Cosmetics</td>
<td>23%</td>
</tr>
<tr>
<td>Food</td>
<td>14%</td>
</tr>
<tr>
<td>Furniture</td>
<td>13%</td>
</tr>
</tbody>
</table>

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?

- **22%** Music subscriptions
- **21%** Film subscriptions
- **6%** Audiobook subscriptions
- **5%** Language learning subscriptions
- **5%** Food subscriptions
- **5%** Fitness subscriptions
- **4%** Clothing subscriptions
- **3%** Dating site subscriptions
- **2%** Medication subscriptions
- **10%** Other
- **55%** I don’t have any online subscriptions

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%** Germany
- **36%** China
- **25%** France
- **21%** USA
- **14%** UK
- **14%** Italy
- **9%** Austria
- **7%** Netherlands
- **2%** Belgium
- **9%** Other EU countries
- **7%** Other countries outside the EU

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?

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No delivery option to Switzerland</td>
<td>80%</td>
</tr>
<tr>
<td>Hidden costs</td>
<td>78%</td>
</tr>
<tr>
<td>Delivery fees</td>
<td>74%</td>
</tr>
<tr>
<td>Preferred payment option not available</td>
<td>73%</td>
</tr>
<tr>
<td>The product was unavailable</td>
<td>65%</td>
</tr>
<tr>
<td>A bad feeling about the security of the shop</td>
<td>63%</td>
</tr>
<tr>
<td>Not user-friendly</td>
<td>56%</td>
</tr>
<tr>
<td>Mandatory registration</td>
<td>52%</td>
</tr>
</tbody>
</table>

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?

<table>
<thead>
<tr>
<th>Marketplace</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digitec Galaxus</td>
<td>30%</td>
</tr>
<tr>
<td>Zalando</td>
<td>21%</td>
</tr>
<tr>
<td>Amazon</td>
<td>20%</td>
</tr>
<tr>
<td>ricardo.ch</td>
<td>15%</td>
</tr>
<tr>
<td>Microspot</td>
<td>12%</td>
</tr>
<tr>
<td>AliExpress</td>
<td>8%</td>
</tr>
<tr>
<td>tutti.ch</td>
<td>6%</td>
</tr>
<tr>
<td>eBay</td>
<td>4%</td>
</tr>
<tr>
<td>Wish</td>
<td>5%</td>
</tr>
<tr>
<td>anibis.ch</td>
<td>3%</td>
</tr>
<tr>
<td>Pinterest</td>
<td>1%</td>
</tr>
<tr>
<td>Rakuten</td>
<td>1%</td>
</tr>
</tbody>
</table>

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?

- 68% Easy to compare prices, products and sellers
- 51% Low prices
- 51% Bundling of product categories
- 46% Product ratings and customer comments
- 45% More user-friendly
- 37% Customer-specific range
- 23% More trust than in single online retailers

Virtual marketplaces primarily enable the consumer to compare products, prices and retailers.
Payment
Which payment options do you prefer?

- 74% Credit card
- 74% Invoice
- 48% TWINT
- 31% PayPal
- 29% PostFinance debit card
- 19% Advance payment
- 16% Payment upon collection
- 5% Apple Pay
- 3% Revolut
- 2% Google Pay
- 1% Samsung Pay
- 1% Cryptocurrency

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?

<table>
<thead>
<tr>
<th>Delivery Option</th>
<th>Up to 34 years</th>
<th>35 to 54 years</th>
<th>55 to 64 years</th>
<th>65 years and over</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online consignment tracking</td>
<td>85%</td>
<td>80%</td>
<td>77%</td>
<td>72%</td>
</tr>
<tr>
<td>Advance notice of consignment delivery</td>
<td>75%</td>
<td>76%</td>
<td>79%</td>
<td>79%</td>
</tr>
<tr>
<td>Managing delivery online</td>
<td>67%</td>
<td>64%</td>
<td>61%</td>
<td>50%</td>
</tr>
<tr>
<td>Delivery on a preferred date</td>
<td>52%</td>
<td>48%</td>
<td>46%</td>
<td>41%</td>
</tr>
<tr>
<td>Next-day delivery</td>
<td>49%</td>
<td>47%</td>
<td>37%</td>
<td>32%</td>
</tr>
<tr>
<td>Evening delivery</td>
<td>21%</td>
<td>18%</td>
<td>15%</td>
<td>7%</td>
</tr>
<tr>
<td>Morning delivery</td>
<td>18%</td>
<td>18%</td>
<td>18%</td>
<td>20%</td>
</tr>
<tr>
<td>Same-day delivery</td>
<td>17%</td>
<td>14%</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>Delivery within two hours</td>
<td>9%</td>
<td>8%</td>
<td>6%</td>
<td>4%</td>
</tr>
</tbody>
</table>

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?

82% Items returned in the same packaging
78% Size of boxes optimized to suit individual consignments
71% Use of reusable packaging (e.g. padded envelopes, boxes)
66% Recycling of packaging or filler material from returns by the retailer
62% Shipping of consignments in their original packaging
52% No use of filler material

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?

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Aspect</th>
</tr>
</thead>
<tbody>
<tr>
<td>77%</td>
<td>Information on product origin</td>
</tr>
<tr>
<td>72%</td>
<td>Sustainability of products</td>
</tr>
<tr>
<td>71%</td>
<td>Sustainable packaging</td>
</tr>
<tr>
<td>69%</td>
<td>Sustainable approach to returns</td>
</tr>
<tr>
<td>63%</td>
<td>Information on manufacturing conditions of products</td>
</tr>
<tr>
<td>59%</td>
<td>Sustainable shipping options</td>
</tr>
<tr>
<td>57%</td>
<td>Sustainable operation of the online shop</td>
</tr>
<tr>
<td>56%</td>
<td>Information on transport</td>
</tr>
</tbody>
</table>

77% would like to have transparency with regard to product origin.
Returns
How important are the following return options to you?

- 95% Easy returns process
- 92% Clear returns conditions
- 83% Quick refund
- 76% Posting at a Swiss Post branch
- 75% Information on the status of returns
- 59% Returns deadline of over 14 days
- 41% Returns in store
- 35% Posting at parcel point (Kiosk)
- 28% Domicile collection, e.g. pick@home
- 25% Returns via parcel terminal

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?

37% Always
29% Often
21% Occasionally
10% Rarely
3% Never

Over half of those surveyed often or always check the conditions for returning items.
Returns
Which returns process do you prefer?

62% of respondents prefer a purely physical returns process.

- 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
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.

- **89%** The item did not meet my expectations (e.g. size, quality)
- **48%** I ordered several items to choose from
- **29%** The item was defective or damaged
- **14%** I accidentally ordered an item incorrectly or twice
- **14%** The retailer delivered the wrong goods
- **9%** The item arrived too late
- **1%** I used the item once and then sent it back
**Customer service**
What types of customer service are important to you?

<table>
<thead>
<tr>
<th>Service</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-mail</td>
<td>92%</td>
</tr>
<tr>
<td>Contact form</td>
<td>71%</td>
</tr>
<tr>
<td>Telephone</td>
<td>66%</td>
</tr>
<tr>
<td>FAQs</td>
<td>43%</td>
</tr>
<tr>
<td>Chat/bot</td>
<td>24%</td>
</tr>
<tr>
<td>Social media</td>
<td>13%</td>
</tr>
</tbody>
</table>

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

Zurich University of Applied Sciences in Business Administration (HWZ)
Institute for Digital Business
Manuel P. Nappo
Lagerstrasse 5
8021 Zurich
manuel.nappo@fh-hwz.ch
www.fh-hwz.ch
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
Logistics Services
Wankdorfallee 4
3030 Bern
digital-commerce@swisspost.ch