

# 2023 customer survey: **Swiss e-commerce trend indicator**

A 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 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 2023 via a quantitative online questionnaire. Almost 10,000 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 June 2023. 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 could therefore 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 10,122 participants. The completion rate was around 67%. The median editing time 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 9,687 participants.

# Study design

An overview of the study



## Sample size

9,687 participants (after cleaning)



## Survey period

5 to 18 June 2023



## Method

Quantitative online survey



## Questions

28 closed questions

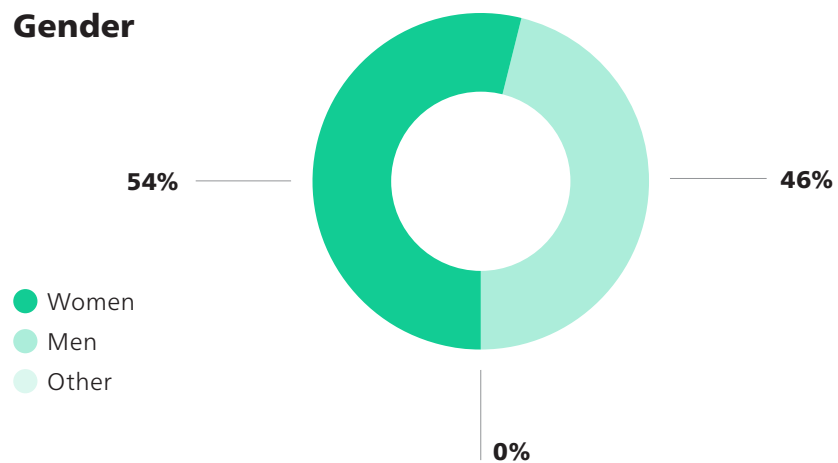
# Study design

## Statistical data

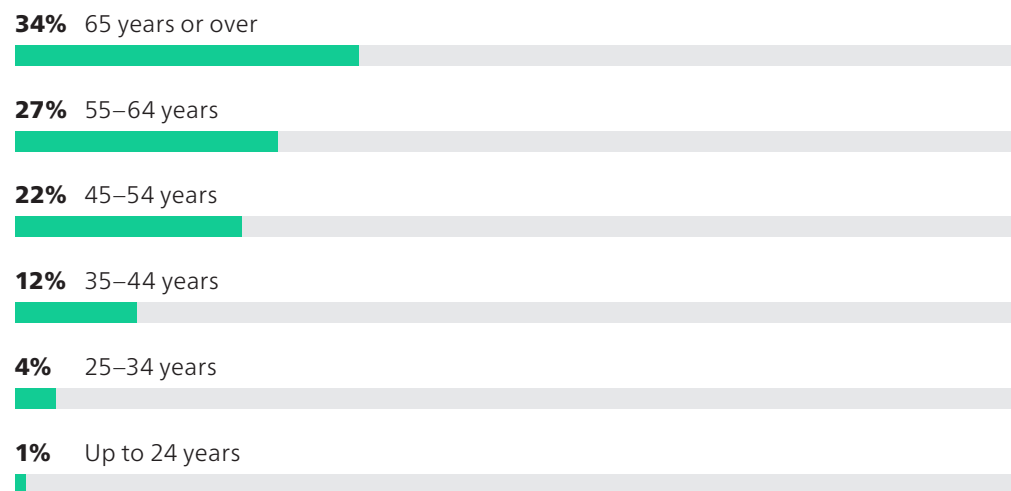
### Language



### Gender



### Age

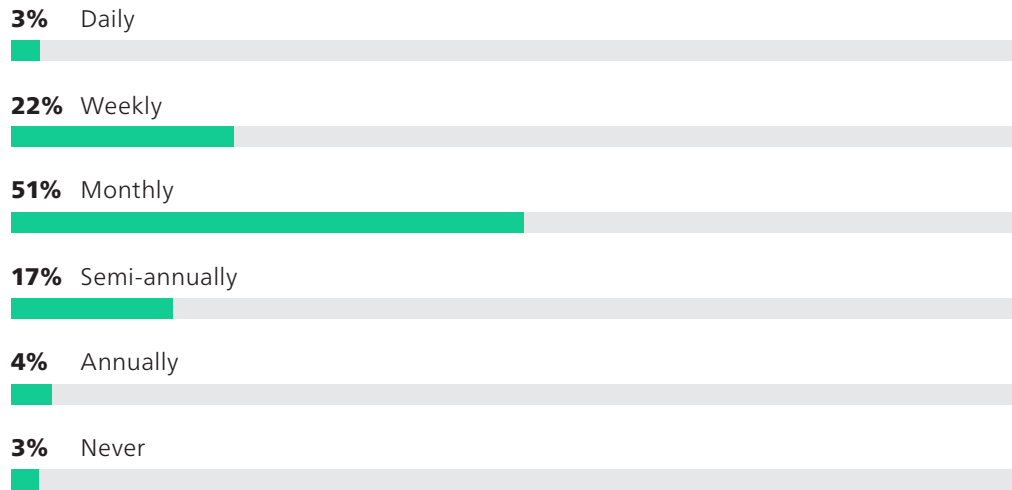


# Overview of topics

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# Marketing

## How often do you shop online?



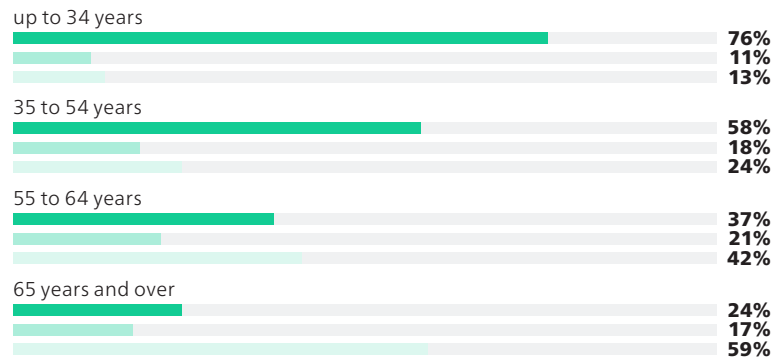
**76%** shop monthly or more frequently online.



# Marketing

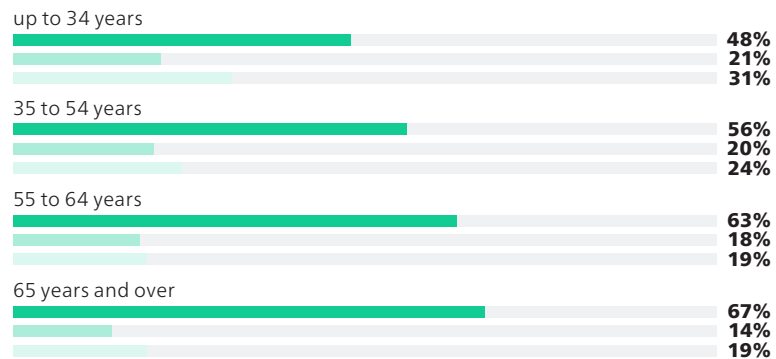
How often do you use the following devices when shopping online?

## Smartphone

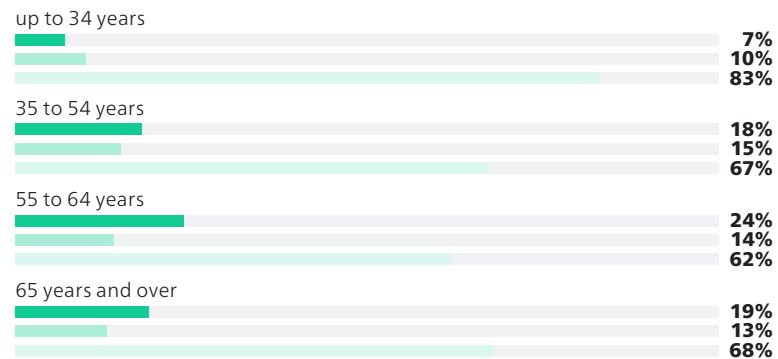


- Often to always
- Occasionally
- Seldom to never

## PC (desktop/laptop)



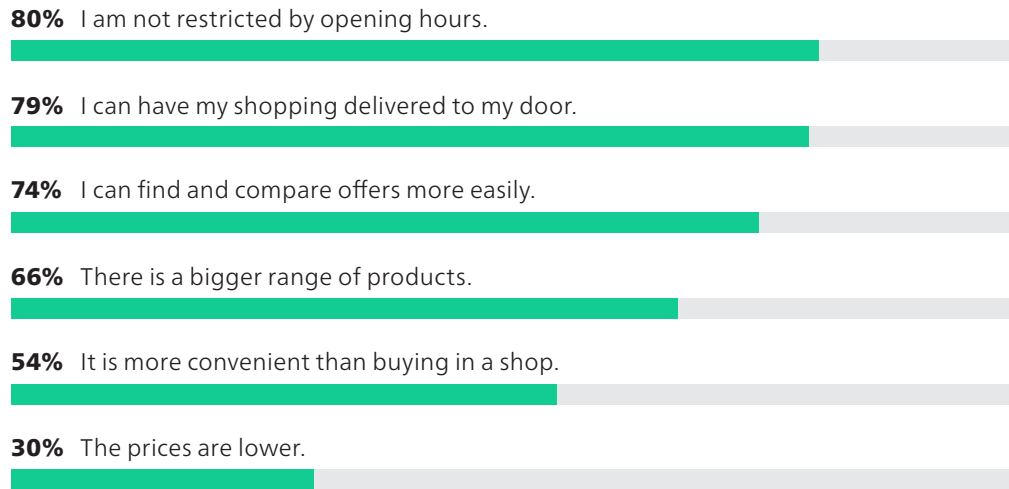
## Tablet



**76%** of people up to the age of 34 use their smartphone often or all of the time. PCs are used by **67%** of people aged 65 and over.

# Marketing

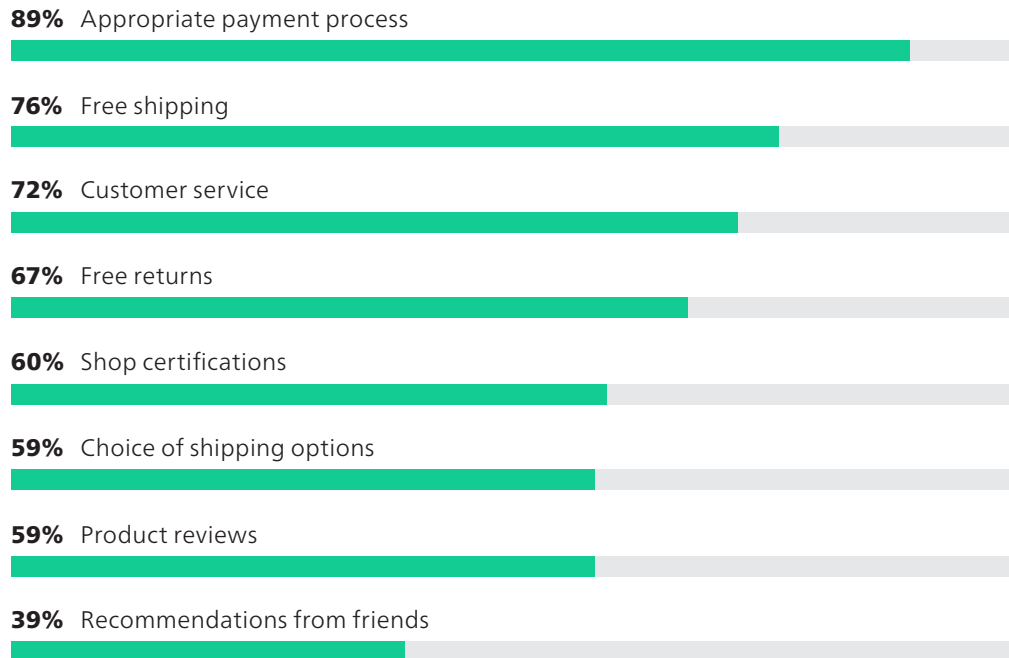
## Why do you shop online?



**80%** of respondents appreciate the flexibility of time afforded by shopping online, and **79%** the fact that purchases are delivered to their homes.

## Marketing

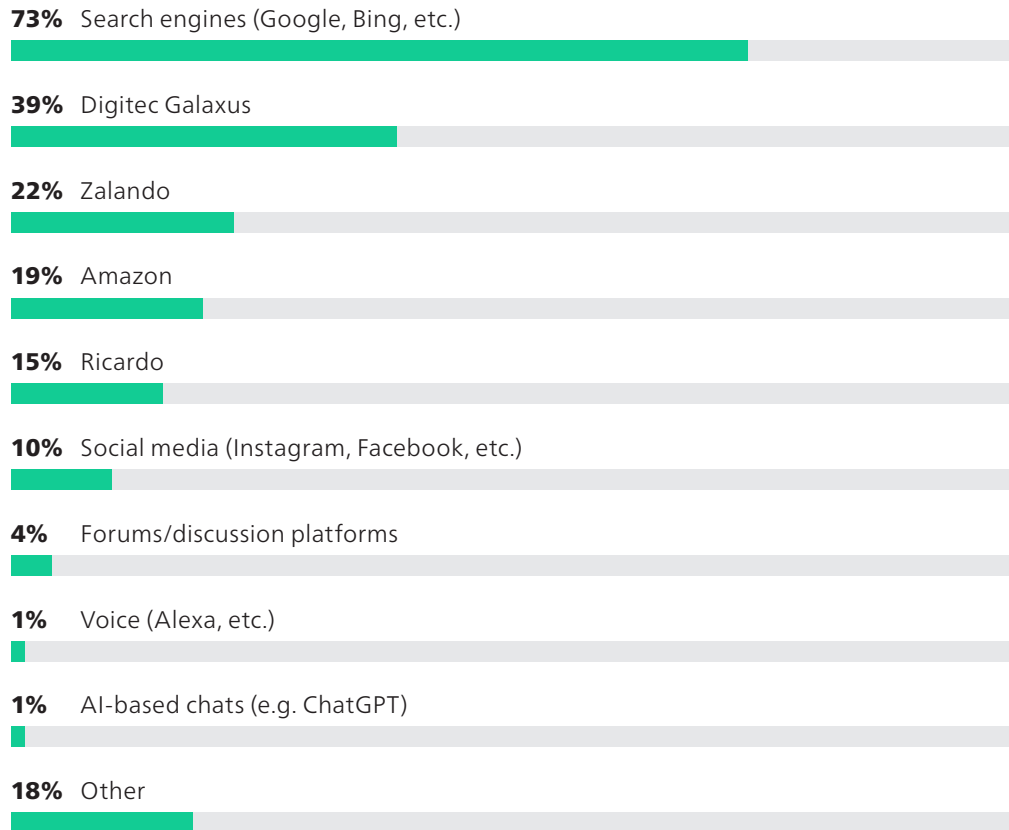
How important are the following criteria to you when shopping online?



Overall, criteria such as appropriate payment processing (**89%**) and free shipping (**76%**) are most important to respondents.

# Marketing

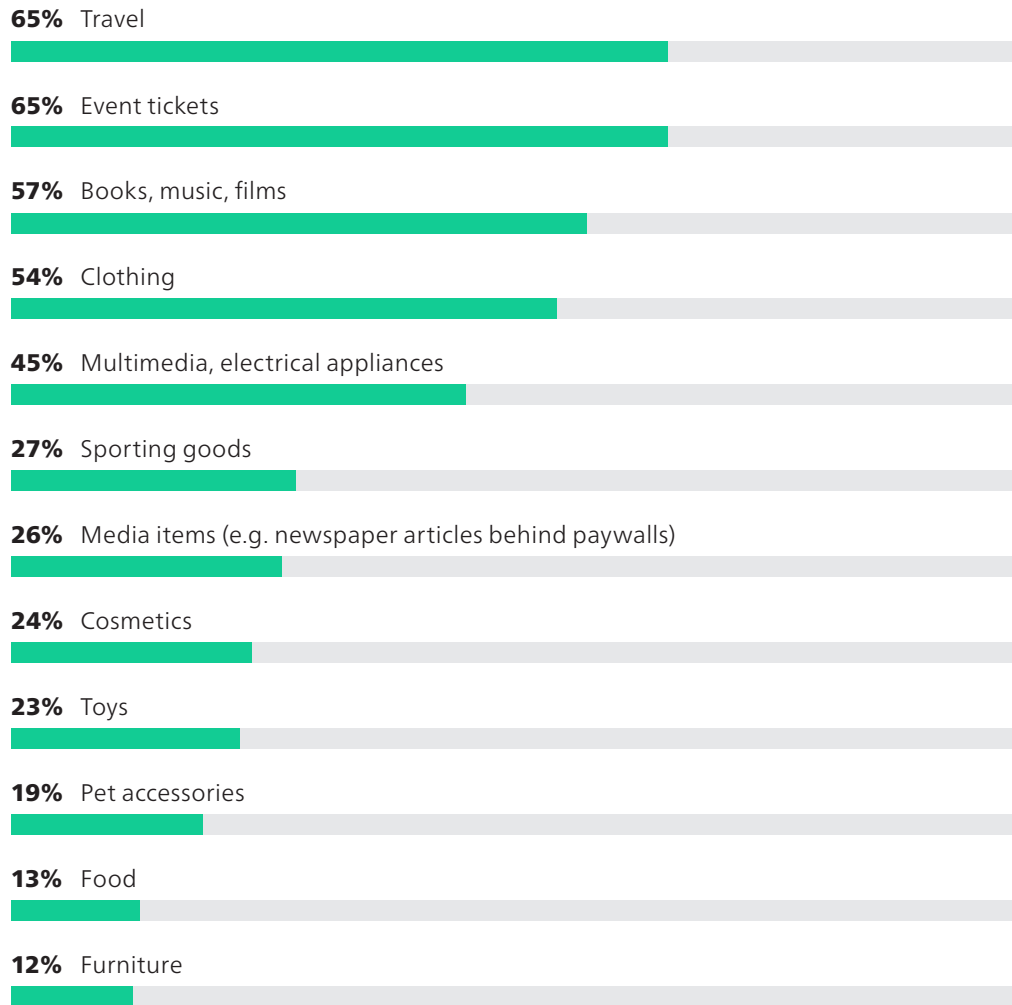
Where are you most likely to start your product search when shopping online?



**73%** start their product search when shopping online on search engines. **39%** start their product search directly at Digitec Galaxus, and **22%** at Zalando. Only **1%** of respondents start their product search using AI-based chats.

# Orders

## What products do you buy most often online?

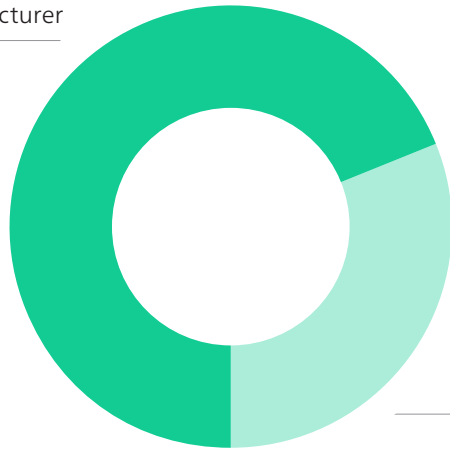


Compared to the previous year, travel in particular is increasingly purchased online (from **62%** to **65%**).

## Orders

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

**69%** Product manufacturer

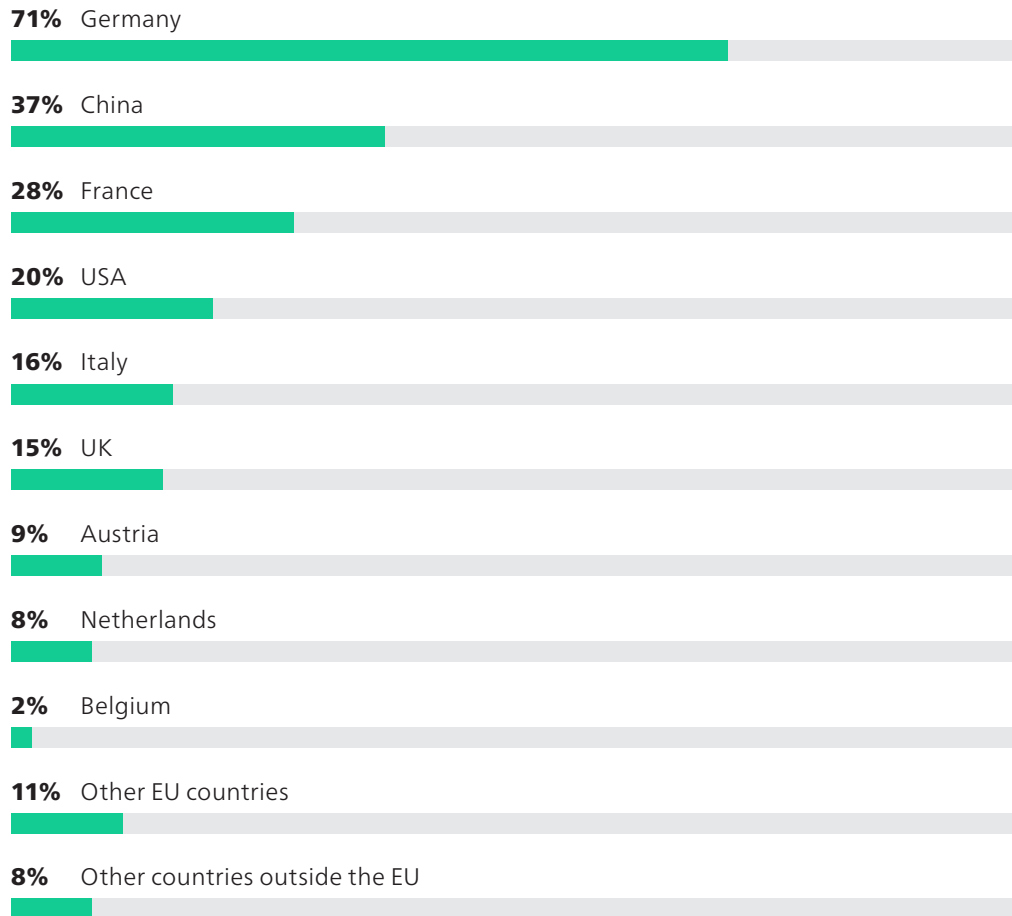


**31%** Retailer or virtual marketplace

Buying online from the product manufacturer is clearly preferred.

# Orders

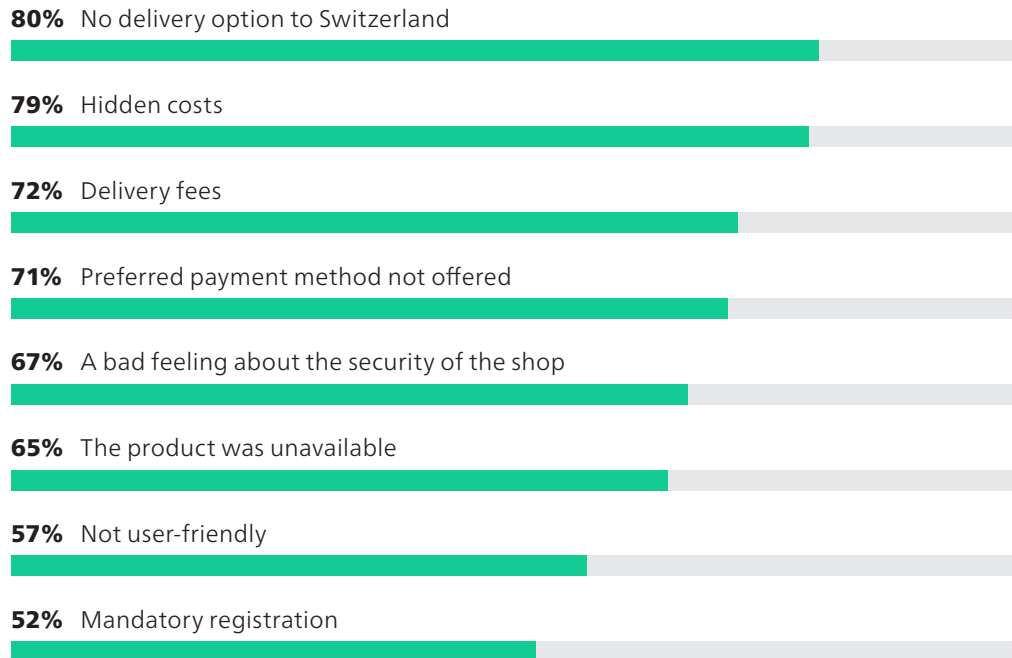
In which countries are the online shops based that you have used to make purchases in the past 12 months?



**71%** have purchased from German online shops in the past twelve months, **37%** from China.

# Orders

## What are your reasons for cancelling an online order?

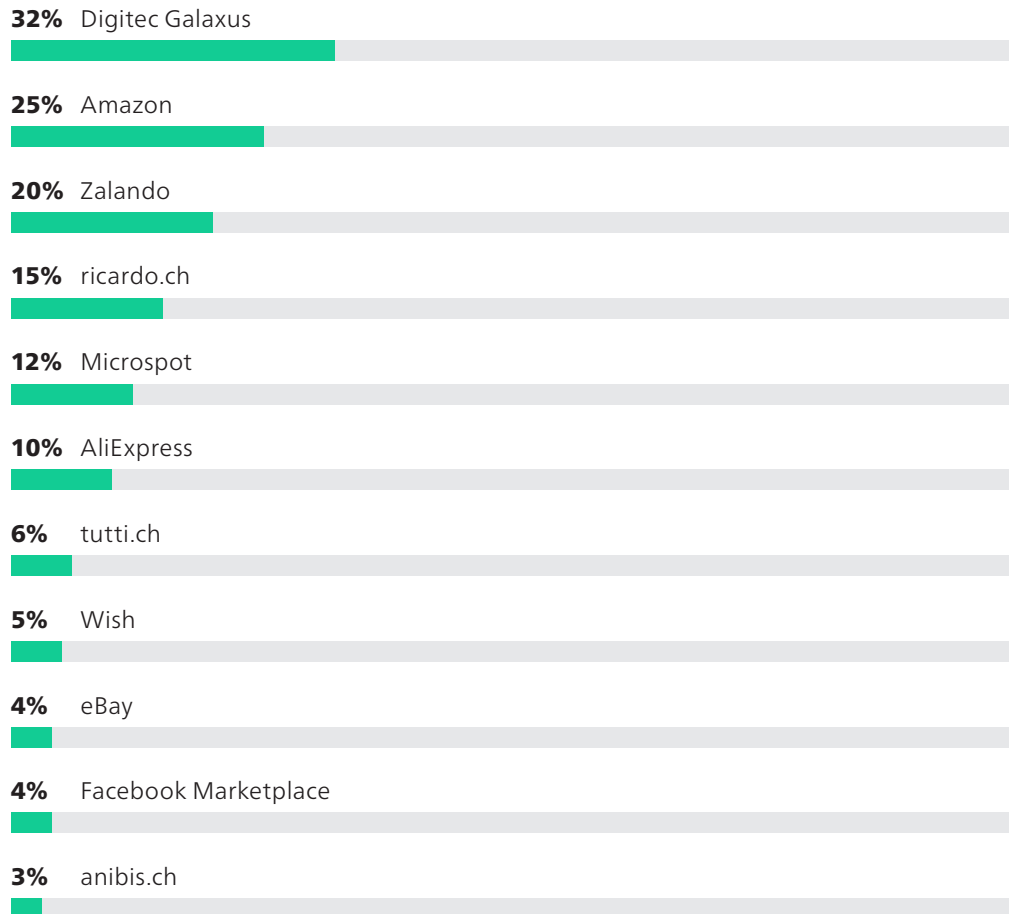


The main reasons for cancelling the order process are no delivery to Switzerland (**80%**) and hidden costs (**79%**). **67%** had a bad feeling about the shop's security, compared to **63%** in 2022.



## Virtual marketplaces

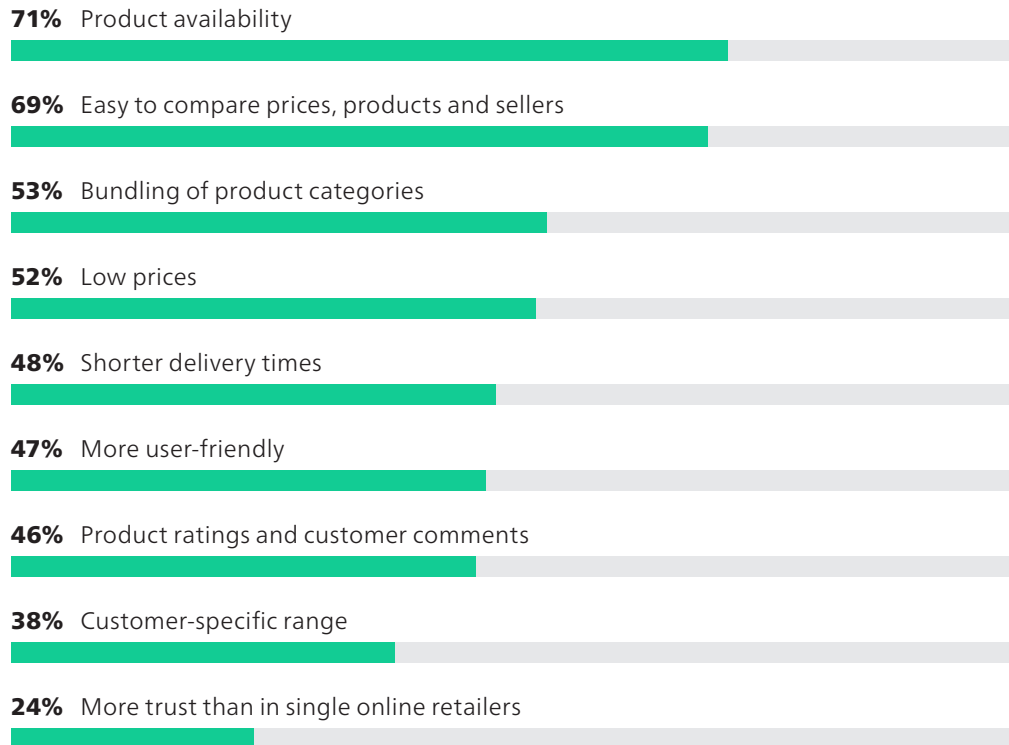
On which of the following virtual marketplaces do you shop?



Digitec Galaxus, Amazon and Zalando are amongst the most popular online marketplaces for Swiss online shoppers. Amazon in particular (**25%**) has gained in importance compared to the previous year (**20%**).

## Virtual marketplaces

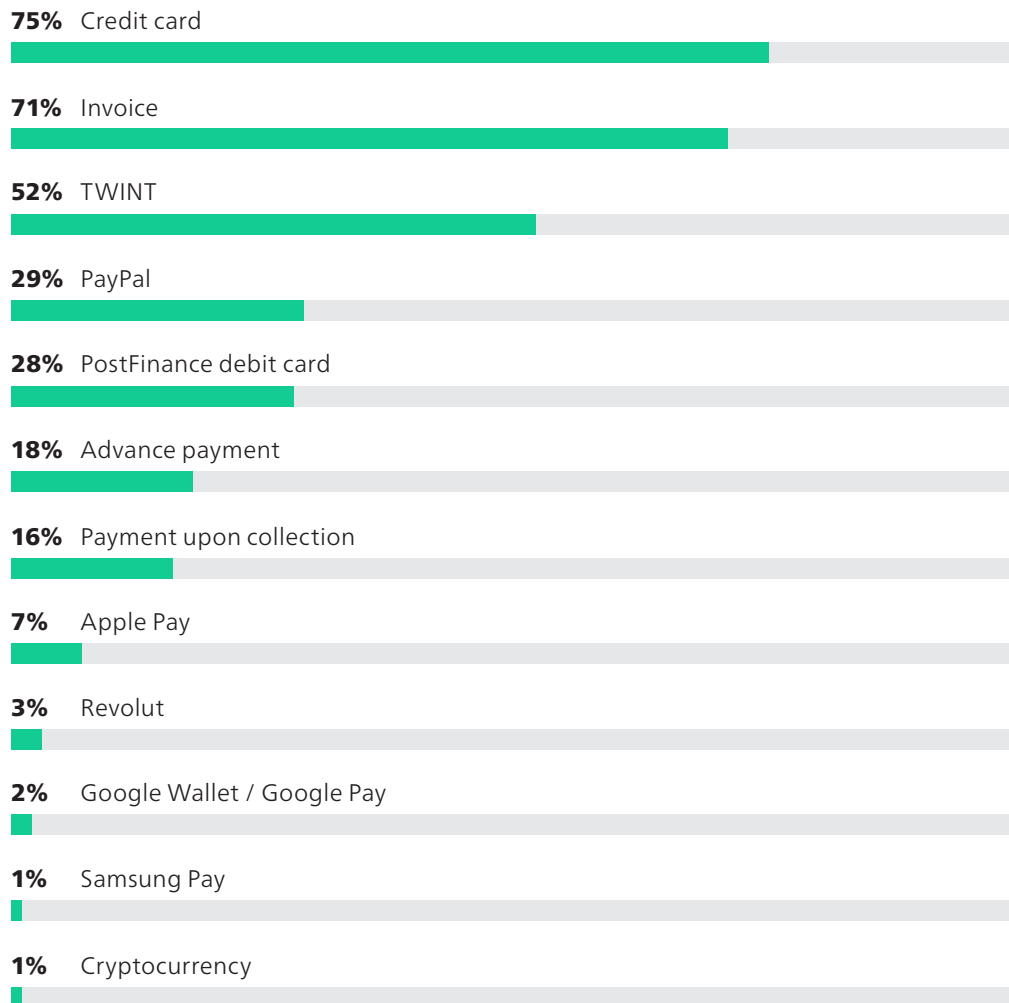
What are the reasons why you shop on virtual marketplaces?



Virtual marketplaces primarily enable high availability of products (**71%**) and the ability to compare products, prices and sellers (**69%**).

# Payment

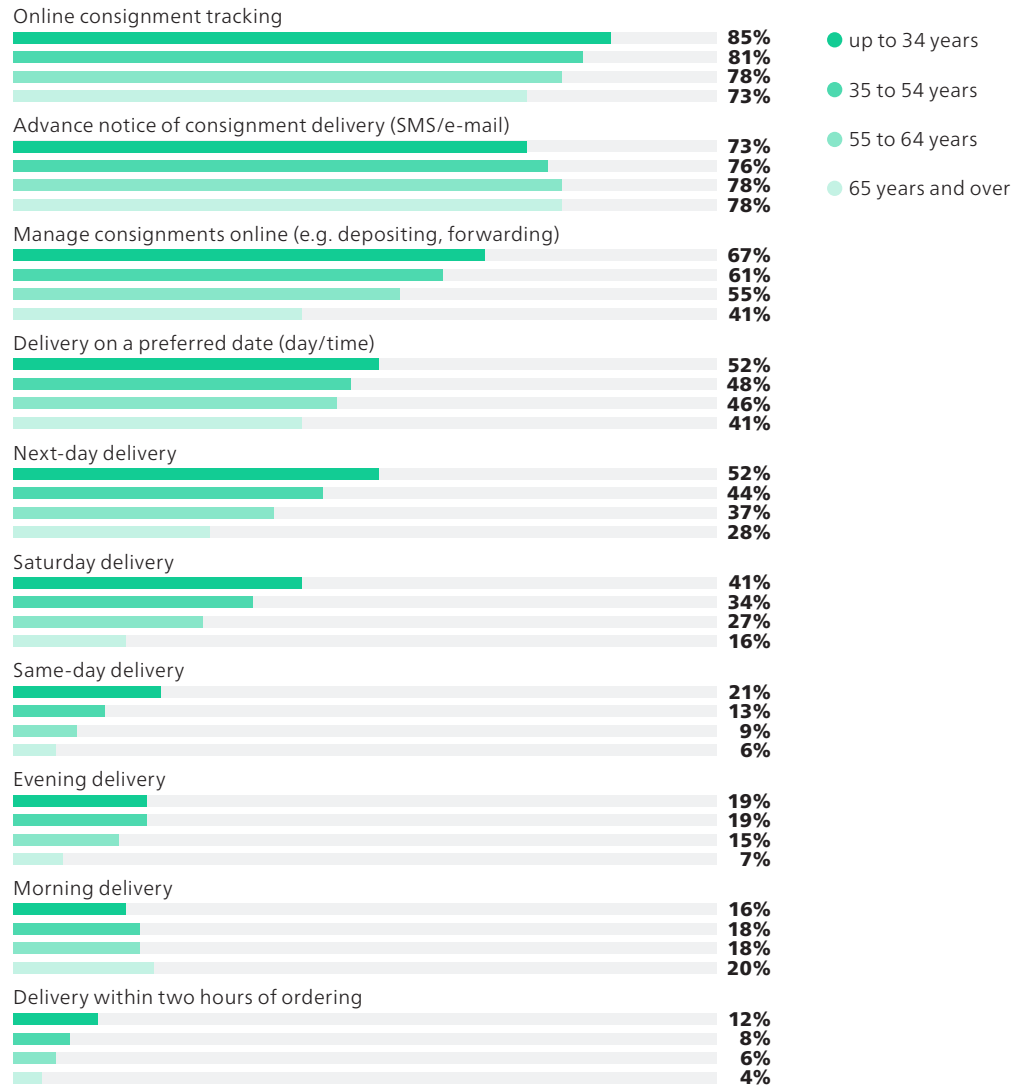
## Which payment options do you prefer?



The majority prefer to pay by credit card or invoice. The invoice has decreased slightly (from **74%** to **71%**). **52%** prefer to pay with TWINT, which equates to **4%** 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.

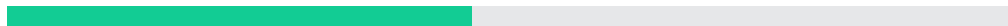
## Logistics and sustainability

How highly do you rate the following sustainable shipping options?

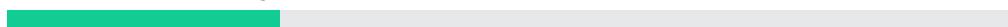
**51%** Consolidated shipping (bundling of multiple purchases)



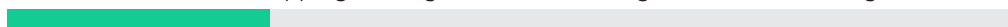
**46%** Carbon-neutral shipping (through carbon offsetting) without any extra charge



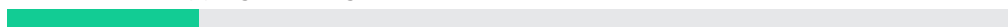
**27%** Use of locally adapted logistics solutions (e.g. bicycle delivery services in combination with trains, eCargo bikes)



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



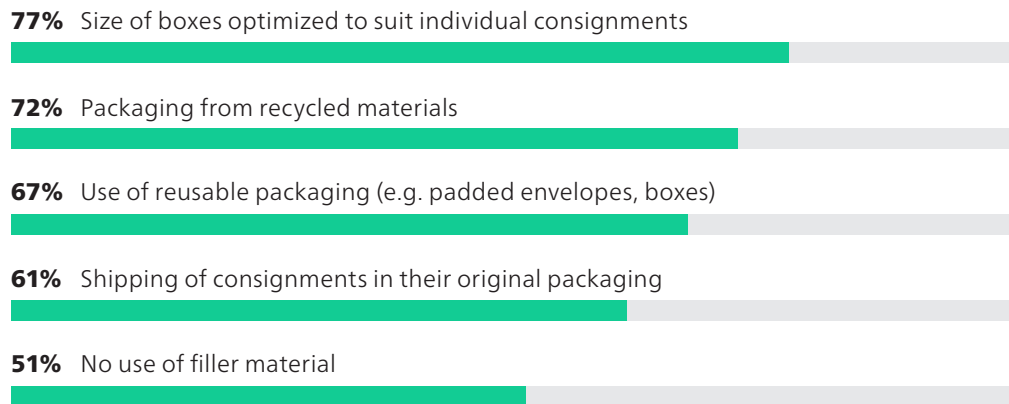
**19%** Slower shipping of consignments



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

## Logistics and sustainability

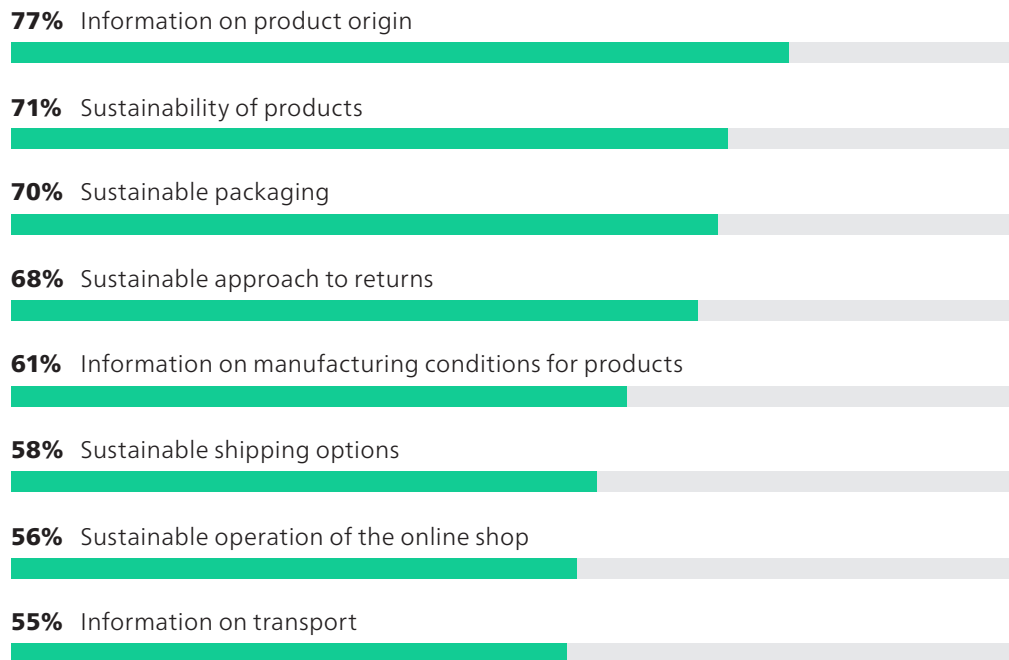
How important to you are the following aspects regarding the packaging of the ordered goods?



Retailers can impress their customers with returns shipping using customized parcels, recycled materials and reusable packaging.

## Logistics and sustainability

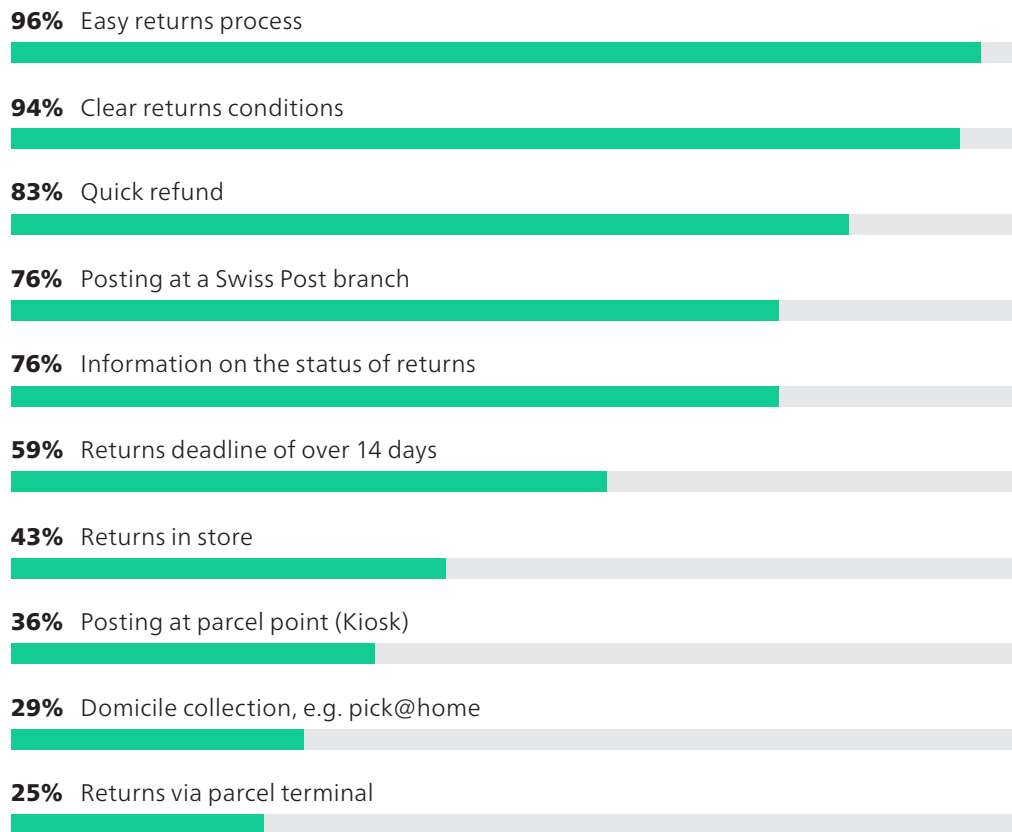
How important are the following sustainability aspects to you when shopping online?



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

# Returns

How important are the following return options to you?

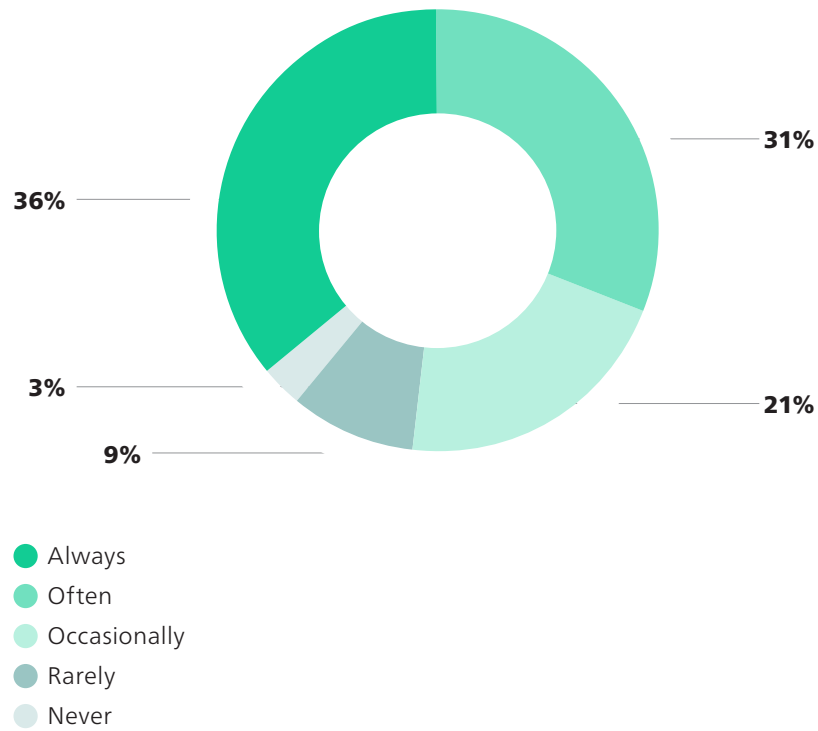


Simplicity (**96%**) and transparency regarding returns conditions (**94%**) are the key requirements for returns. **83%** consider a rapid refund important.



## Returns

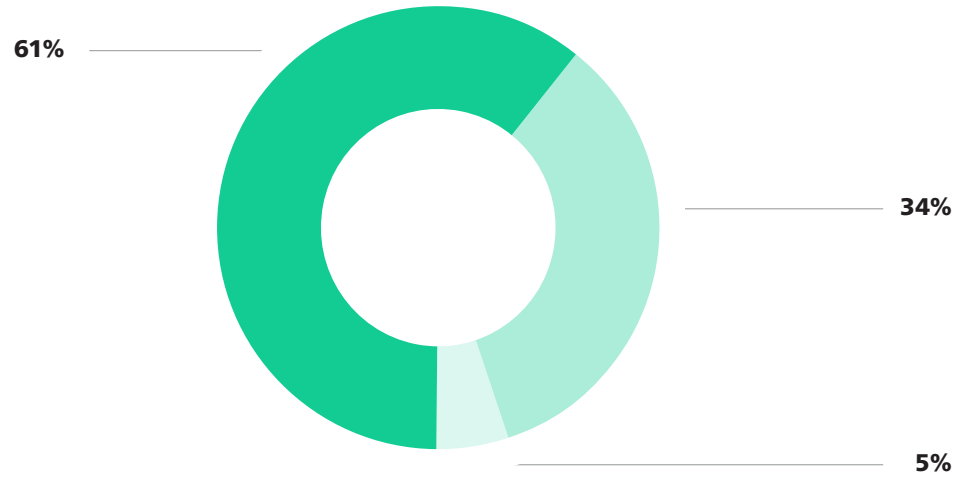
Do you check the online shop's conditions for returns before ordering?



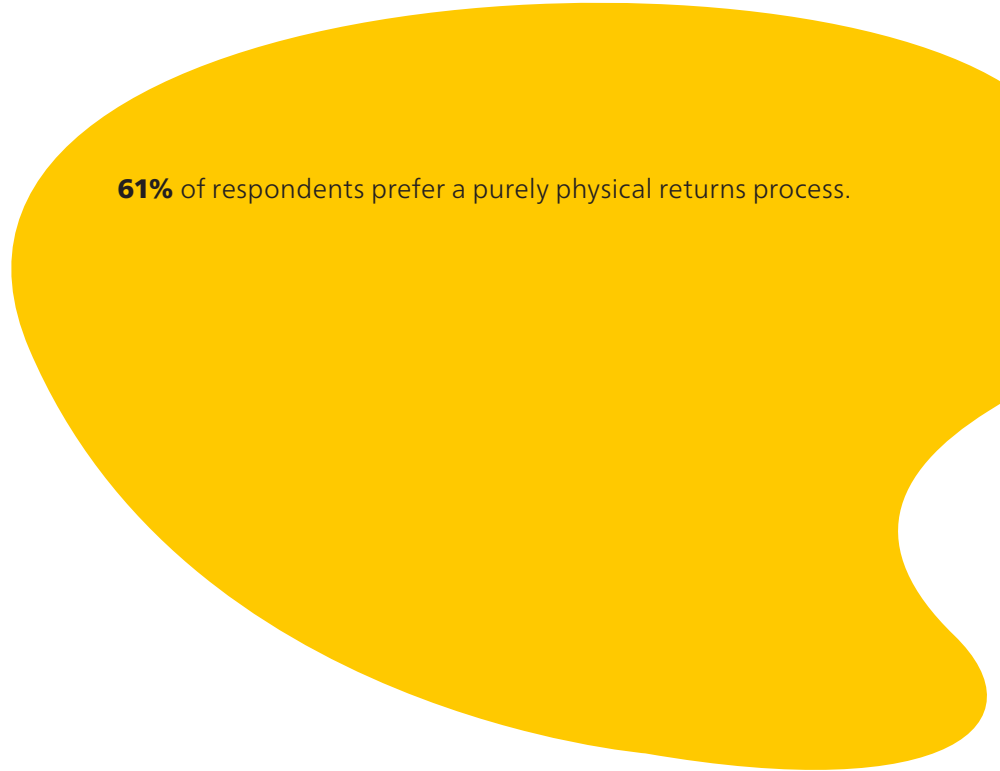
Almost 70% of those surveyed often or always check the conditions for returning items.

# Returns

## Which returns process do you prefer?



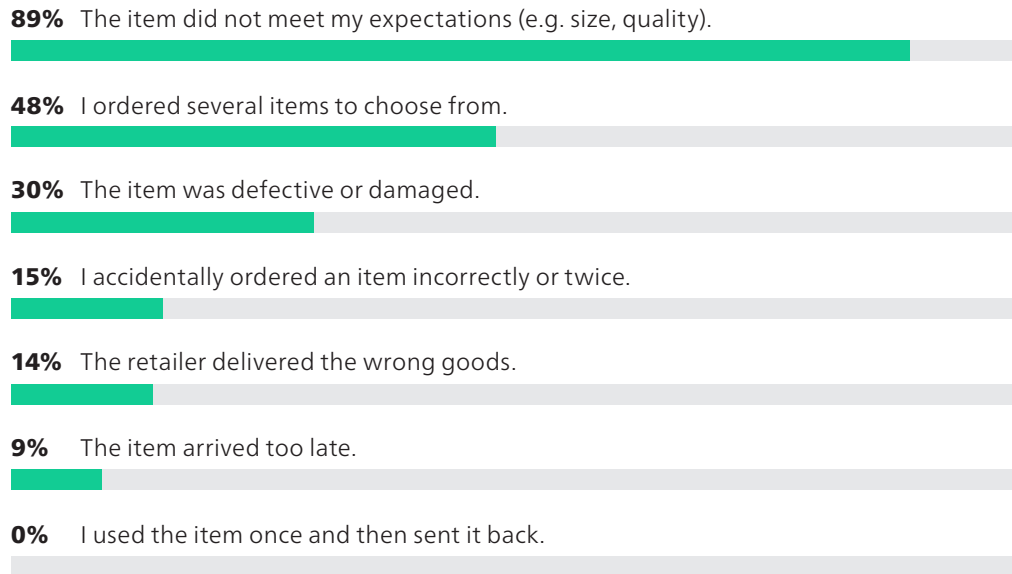
- Solely physical returns process (return note and label enclosed with consignment)
- Digital and physical, e.g. registration of returns via app, with label print-out
- Solely digital returns process (paperless), e.g. processing via a customer portal



61% of respondents prefer a purely physical returns process.

# Returns

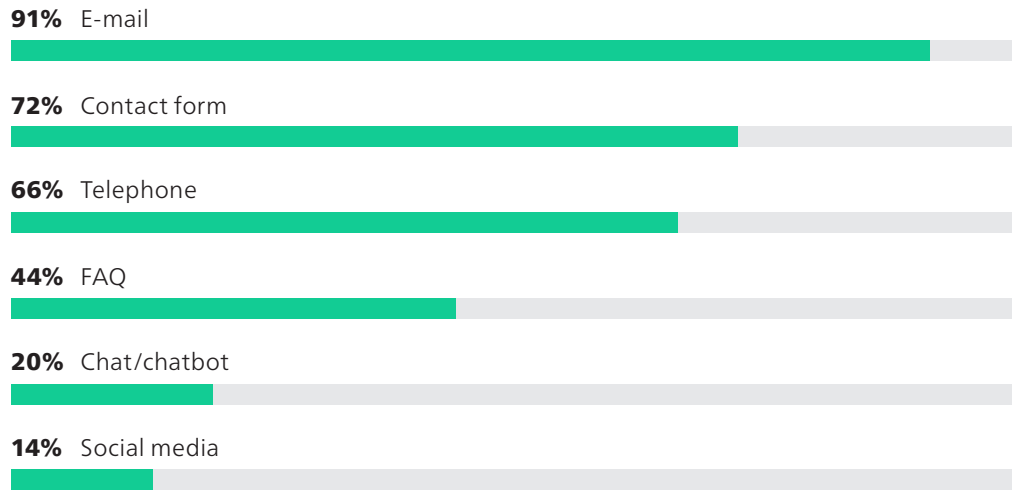
What are your most common reasons for returning goods?



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 still consider e-mails to be important **(91%)**.

# 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 conducted methodically and supported by the HWZ Institute for Strategic Management: Stakeholder View.

More information can be found at:

[www.fh-hwz.ch/idb](http://www.fh-hwz.ch/idb)

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