



The Omnichannel Readiness Index for the Swiss Retail Industry - 2.0

a study commissioned by



In cooperation with



Methodology

Methodology

For the second edition of the Omnichannel Readiness Index (ORI 2.0) for the Swiss retail industry, **55 Swiss retailers from all sectors** (including 50 omnichannel retailers and 5 selected online retailers) were analyzed between December 2019 and January 2020 using **desk research** based on **approx. 100 criteria**. Compared to ORI 1.0, the tested services were supplemented by current topics.

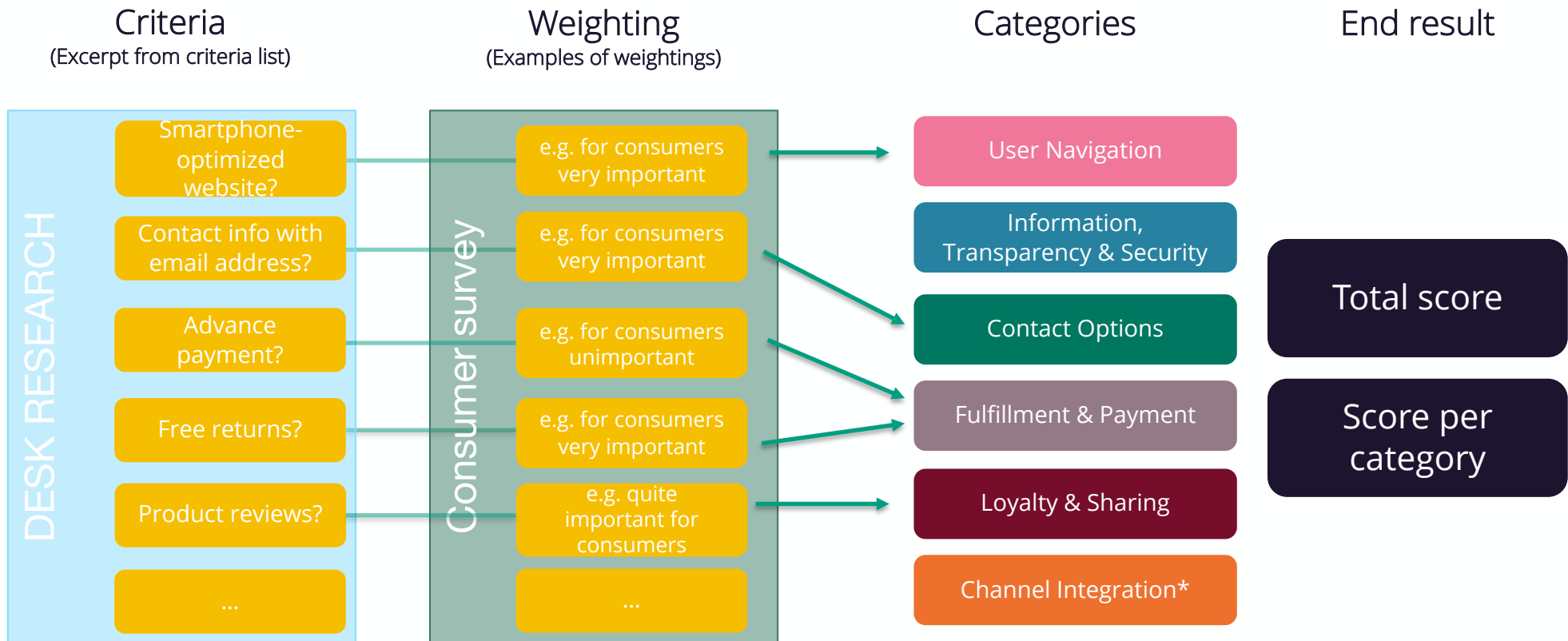
At the same time, additional information was gathered from amongst the omnichannel retailers via a **retailer survey**. 29 of the 50 omnichannel retailers took part in the retailer survey.

In order to determine **how important the criteria actually are for the consumers**, a further **1000 people** from the German-speaking and French-speaking parts of Switzerland were **questioned in a representative manner**. The customers were asked **how important the different options and features on the websites of the retailers and in their stores were to them**. **Therefore, important criteria are given a higher weighting in the calculation**, whereas unimportant criteria do not influence the result as much. The criteria catalog is based on an ideal omnichannel offer, which would be feasible by retailer standards today.

The desk research criteria can be divided into **six different categories**: “User Navigation”, “Information, Transparency & Security”, “Contact Options”, “Fulfillment & Payment”, “Loyalty & Sharing” and “Channel Integration”. The “Channel Integration” category is relevant to the omnichannel retailers, however not to the exclusive online retailers.

In addition, the results of the desk research and the retailer survey across all retailers were evaluated to reveal **key figures on the organization and strategy** of the companies as well as show **undiscovered potential**. These are certain criteria that are often desired by consumers, but which are still offered by companies at a low level. In this way, the study shows that **the Swiss retail trade has good potential**.

Methodology



*Only considered in the index for omnichannel retailers

Key Findings

Key Findings from the Consumer Survey

What is particularly important to the consumers?

The consumer survey questioned people who order online at least every 6 months. 65% of the people questioned said they would make online purchases at least once a month. The retailer's email address is seen as the **most important way of communicating** with a retailer (76%), followed by a contact form (52%) and telephone hotline (49%).

Information on store opening hours on the retailer's website is essential and important for 78% of people surveyed.

The **option to order as a guest** is important to most consumers (74%), while login via third-party providers is only important to 24% of people surveyed. 80% of the people surveyed already use their **smartphone** to make **online purchases or find out about retailers**, and 75% of these people consider a mobile-optimized website to be important. Security is also of great importance when shopping online – a secure website is essential.

Almost 75% would also like to have the retailer's opening hours displayed via **Google my Business**. Search fields and filter options are essential for the **product search**. In the **detailed view of products**, 80% expect the availability of a product to be displayed in the online shop, 73% also expect information about availability of the product in a particular store. For 74%, a zoom in/enlargement option for product images is also important.

More than 60% use wish lists/watch lists for saving products, and 25% of the people who use watch lists actually share them with others.

The **retailer's loyalty program** is considered important mainly for collecting discounts and points. During purchasing, **information about shipping and payment options** and **returns** that can be found quickly is particularly important. The general right of return and the possibility of returning a product for free are also of particular importance. It is important for 86% that an online shop offers the possibility of free delivery, and almost 80% would even like to have an unlimited possibility of free delivery (i.e. regardless of the value of the goods, the product categories ordered from, etc.). It is also essential that the delivery time is specified in the online shop. More than two-thirds of consumers want the same product range to be offered both online and offline. Customers also expect to be able to redeem vouchers both online and offline.

Key Findings from the Retailer Survey

What do the retailers currently offer?

Almost all of the 29 participating retailers indicated that their online shop has references to events or offers in the stores. Furthermore, most retailers in the stores also refer to the online shop. The checking of product availability (online & store) by employees is possible with almost all retailers, with delivery to the desired store possible at 69% of participating retailers. More than 75% also provide tablets or terminals in-store to link the online/offline experience.

Mobile payment can be used at almost all of the retailers surveyed in their stores (88%), 72% also offer free Wi-Fi in their stores.

Consumer data is used for personalized advertising by most retailers (90%), mainly for personalized mailing content.

Among those retailers surveyed that have a **customer loyalty program**, all of them offer the opportunity to collect loyalty points/rewards both online and offline. Promotional vouchers are mainly offered by email or newsletter and on the website as well as in-store and are predominantly redeemable both online and offline.

At participating retailers, almost the entire **in-store product range is also available online** (average 87%). In most cases, there are no price differences between products bought online and those bought in-store (for 93% of retailers).

52% of companies employ **omnichannel managers** and 52% also have employees dedicated to data analytics and big data. Furthermore, approx. 60% the companies have separate responsibilities for e-commerce and in-store sales. E-commerce is also usually run as a separate cost center in the company.

86% of participating retailers are able to update **stock availability** at least once per day, but there is still potential to use stock availability data for local online advertising – currently 39% of retailers have implemented this.

In the area of analytics, **website analysis tools** are clearly ahead of in-store analysis tools in terms of usage.

Potential

Potential for the Swiss retail industry

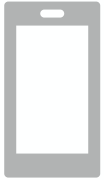
Comparing **consumers' wishes and the current online standard** of retailer websites brings attention to the **potential for future development**. For example, only 6% of retailers offer a **filter function for store availability** (i.e. the ability to filter displayed products according to whether they are available in a particular store), but this is important for 67% of customers. Similarly, only a few retailers offer **unlimited free returns** (regardless of order value, product category, etc.), but this is desired by many customers. Furthermore, 45% of customers would like to be able to request a callback from the retailer in order to avoid waiting in a queue on telephone hotlines, but this is currently only offered by 7% of retailers. There is also potential for **unlimited free delivery** (regardless of order value, product category, etc.) and for specifying a delivery time or delivery time window (in hours).

Potential	Filter function based on store availability	Unlimited free returns	Unlimited free delivery	Specification of the delivery time / a delivery time window	Contact option: callback from retailer
Important for consumers (Top2):	67%	77%	79%	57%	45%
Available with retailers:	6%	22%	24%	7%	7%

Trends

Consumer trends

It can be seen that Swiss consumers are demanding more and more – expectations of omnichannel services from retailers have increased overall.



Mobile shopping has **gained in importance** – in 2020, 80% of those surveyed are already using their smartphone to shop or search for information about retailers (compared to 63% in 2018).



Consumers have **higher demands** when it comes to finding store information quickly and easily in the interests of **convenience**:

- 74% think that it's important to find information about store opening hours directly on Google (compared to 56% in 2018).
- 63% think that it's important to have the store telephone numbers displayed directly on Google (compared to 59% in 2018).



There were also **significant increases** in expectations in the area of **Loyalty & Sharing**:

- 42% expect contextual recommendations, such as sections on “Similar products”, “Other customers also bought”, etc. (2018: 35%).
- 21% would like to have links to the retailer's social media pages on the website / in the online shop (2018: 15%).
 - 53% consider product reviews to be important (2018: 47%).
 - 55% would like to have a watch list or wish list (2018: 50%).
- 51% expect to be able to enter their customer card number in the online shop in order to be able to use the loyalty program online (2018: 46%).

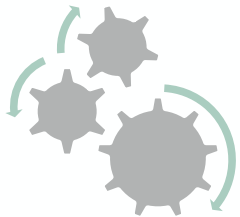
Consumer trends

It can be seen that Swiss consumers are demanding more and more – expectations of omnichannel services from retailers have increased overall.



Expectations regarding **comprehensive accessibility** and direct communication with retailers are also increasing:

- 59% would like to be able to contact particular stores directly by telephone (2018: 53%).
 - 45% would like the option of requesting a callback from the retailer (2018: 41%).
- 29% would also like to be able to communicate with retailers via WhatsApp (2018: 18%).



Consumers are also increasingly expecting **channels to be interconnected (omnichannel)**:

- 49% would like to have the option of Click & Collect with pick-up at the retailer's stores (2018: 44%).
- 41% also consider it to be important to be able to choose Click & Collect with pick-up at other locations (e.g. collection boxes, pick-up points, etc.) (2018: 35%)

Retailer trends

Swiss retailers have already created omnichannel services in some areas, but there is also potential to be even better at meeting customers' needs.



Omnichannel services

Among the retailers surveyed that have a customer loyalty program, all of them offer the opportunity to collect loyalty points/rewards both online and offline.

90% of the retailers surveyed use customer data / CRM for personalized advertising.

93% of the retailers surveyed offer the same prices both online and offline.

Omnichannel effects are also taken into account in the area of analytics: 40-50% of the retailers surveyed measure the visit to a store or an in-store purchase after contact with digital advertising.



Greatest potential

Filter function based on store availability
Is important for 67% of customers and is currently offered by 6% of retailers.

Unlimited free returns (i.e. regardless of order value, category, etc.)
Is important for 77% of customers and is currently offered by 22% of retailers.

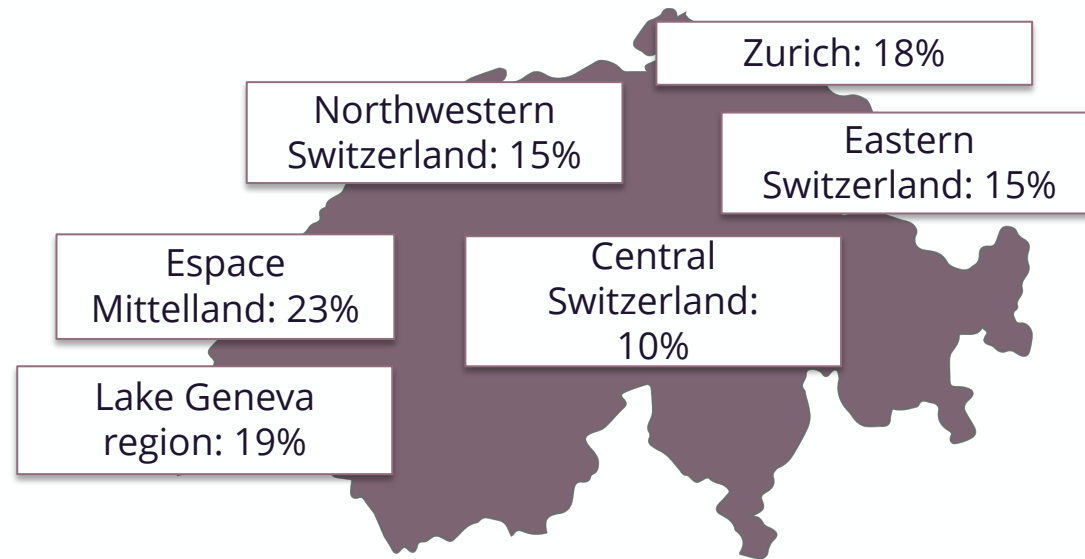
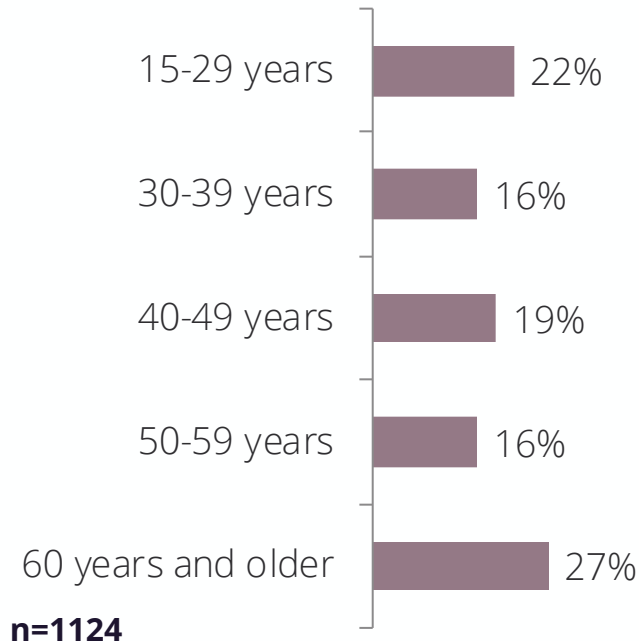
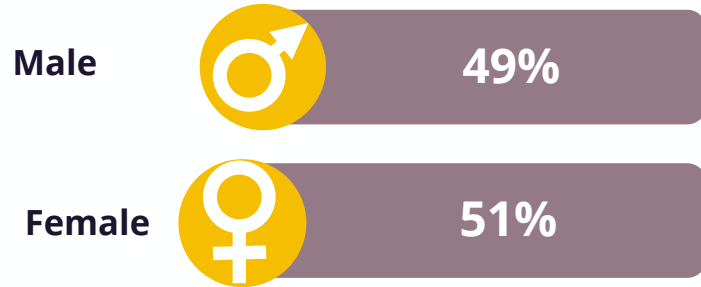
Unlimited free delivery (i.e. regardless of order value, category, etc.)
Is important for 79% of customers and is currently offered by 24% of retailers.

Specifying the delivery time or time window of the delivery in hours
Is important for 57% of customers and is currently offered by 7% of retailers.

Consumer survey

Consumer survey – gross sample size

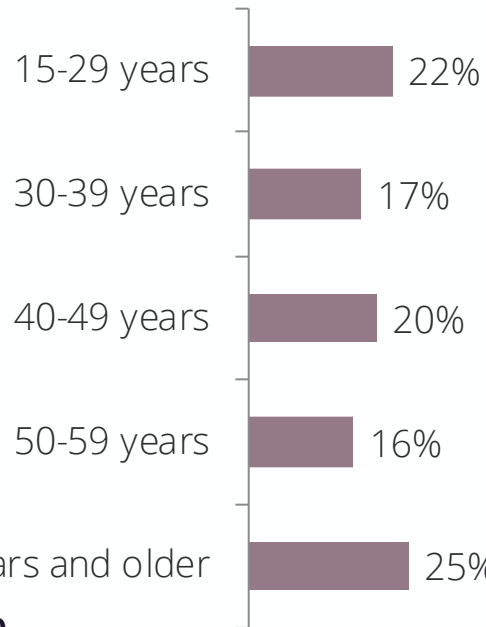
Description of the gross sample size (representative of people age 15 years and above from the German-speaking and French-speaking parts of Switzerland)



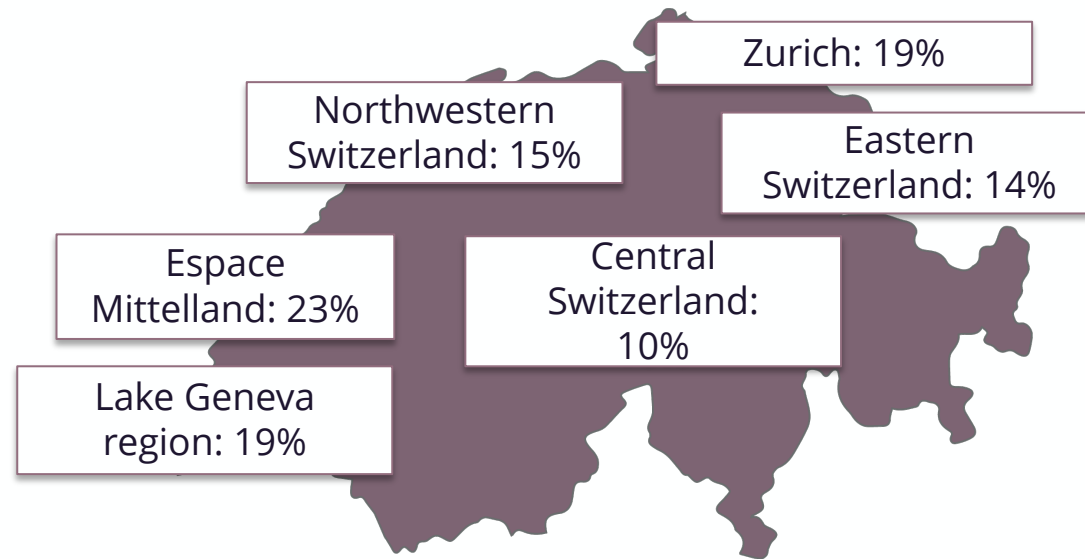
To ensure a representative survey within the target group, the “gross/net” method was used. This means that the quotas for gender, age and region for the gross sample size (= persons over the age of 15) were representative of the German-speaking and French-speaking parts of Switzerland. However, only those persons who are considered part of the core target group were questioned (= persons over the age of 15 who order something on the internet at least every 6 months). This method ensures a representative distribution of the core target group.

Consumer survey – net sample size

Description of the net sample size (representative of people age 15 years and above from the German-speaking and French-speaking parts of Switzerland who order something on the internet at least every 6 months)



n= 1000



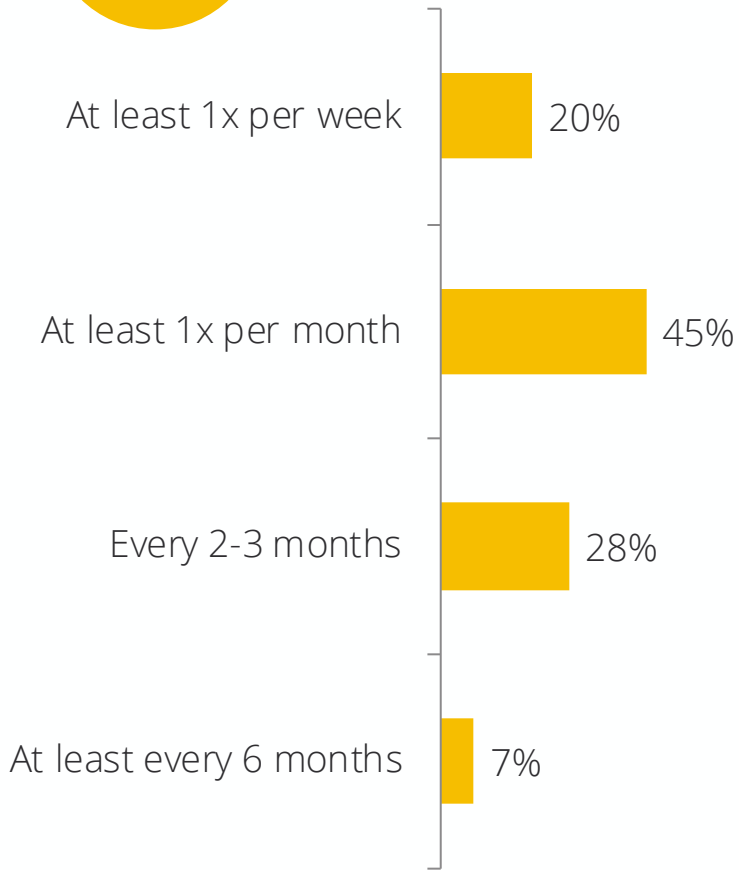
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Consumer survey

Over 60% of the persons questioned order something on the internet at least once a month. The most popular ways to get in touch with retailers are email, contact form and telephone hotline.



How often do you order online?



n=1000



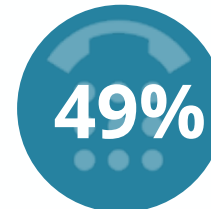
Suppose you would like to get in touch with a retailer:
How important are the following contact and information options to you?
(Top 2 boxes)



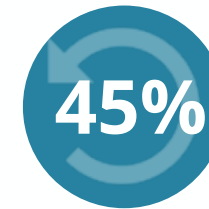
Request by email



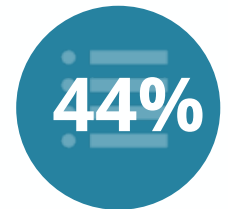
Request by contact form



Telephone hotline



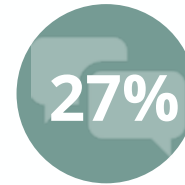
Callback option



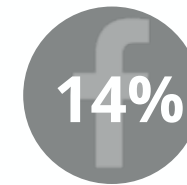
FAQs



Whatsapp



Live chat



Facebook Messenger



Instagram Messenger

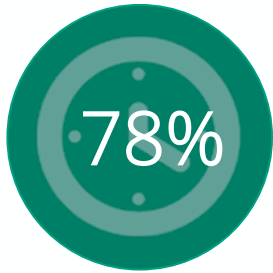
n=1000

Scale from 6 = very important to 1 = not at all important

Consumer survey

Information on store opening hours on the retailer's website is essential and is expected by 78% of people surveyed.
Scale from 6 = very important to 1 = not at all important

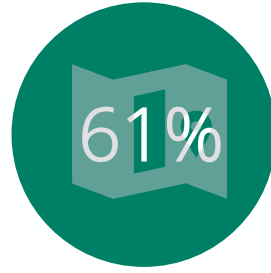
Importance of information on store locations on the website



Store opening hours



Option on the website to search for stores (using a search field)



To view stores in map form



Being able to directly contact the store by telephone number



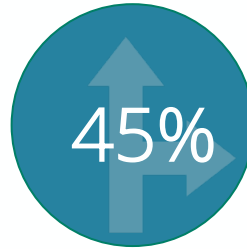
To view stores in list form



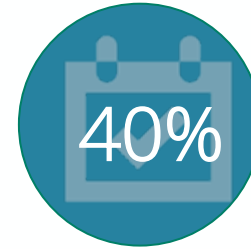
Option of filtering the displayed stores



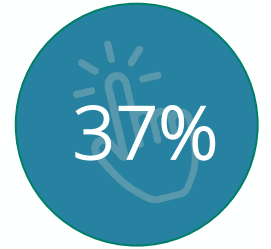
Option of sharing your own location when searching for a store (Geolocation)



To see a direct route planner from my location to the store



Information about events, taking place in stores, and offers available in stores can be found online



Able to call the store with just one click (Click-to-Call)

n=1000

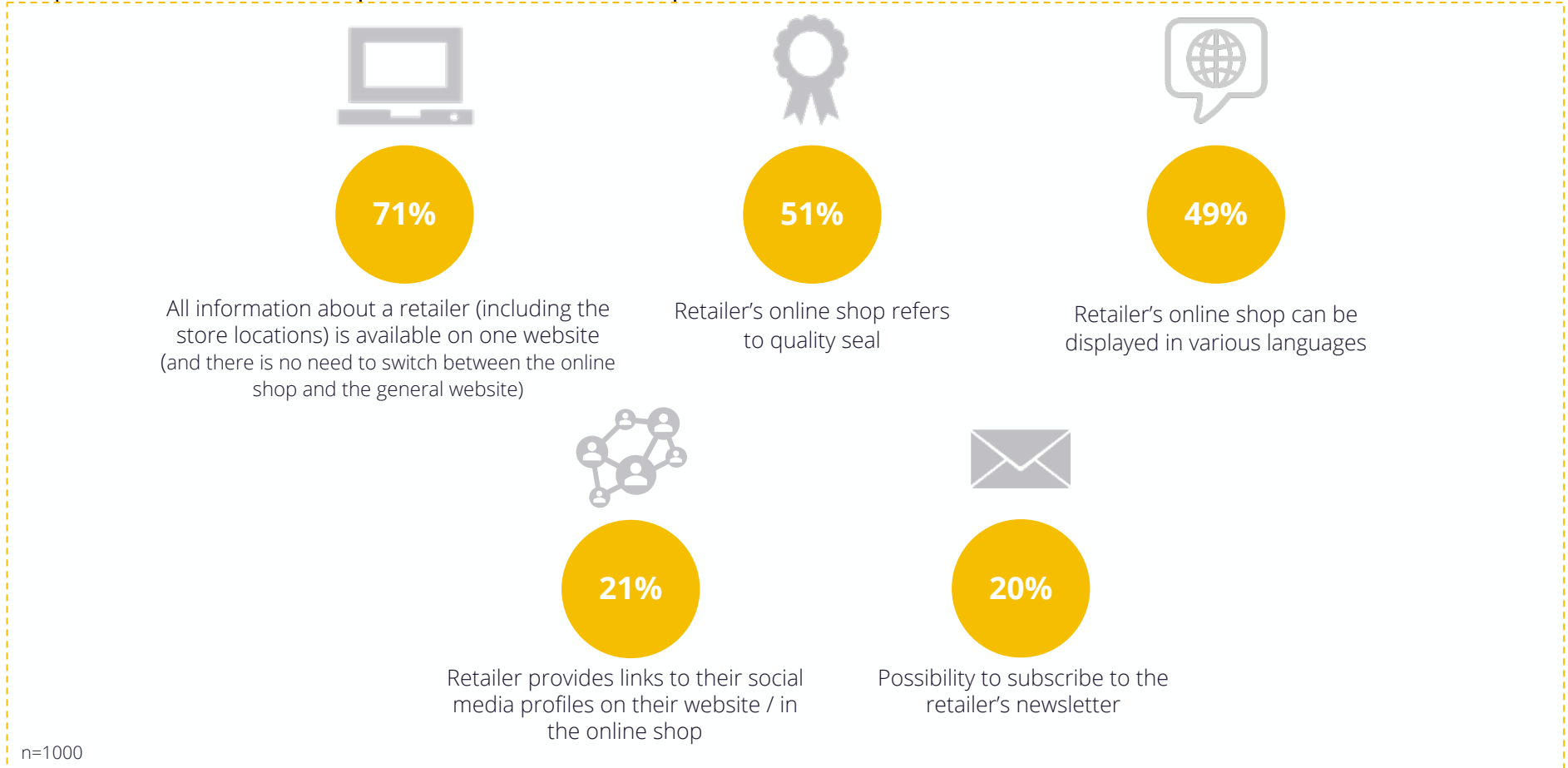
How important are the following options when it comes to finding out about retailer stores? (Top 2 boxes)

Consumer survey

In the case of a retailer's online presence, 71% of those surveyed want to be able to access all the information about a retailer on one website (without having to switch between the online shop and the general website). Quality seals and the possibility of having the page translated are important for around half of the people surveyed.

Scale from 6 = very important to 1 = not at all important

Importance of different aspects of retailers' online presence



How important is it for you to be able to find all the information about a retailer (including the store locations) on one website and not have to switch between several websites (e.g. online shop and general website)? (Top 2 boxes)

How important is it to you that the retailer's online shop has a quality seal? (Top 2 boxes)

How important is it for you that the online shop or the website of a retailer can be displayed in multiple languages (German, French)? (Top 2 boxes)

How important is it for you that a retailer provides links to their various social media sites (e.g. Facebook, Instagram, etc.) on their website / online shop? (Top 2 boxes)

How important is it to you to have the option to subscribe to the newsletter of a retailer? (Top 2 boxes)

Consumer survey

Over 55% would like to receive electronic receipts for purchases made in retailer's stores. Having free Wi-Fi in-store is important for 50% of people surveyed.

Scale from 6 = very important to 1 = not at all important

Importance of services in the retailer's store



How important is it to you to receive electronic receipts (for example, receipts by email or app) in the stores of a retailer? (Top 2 boxes)

How important is it to you, to be able to use free Wi-Fi in the store of a retailer? (Top 2 boxes)

How important is it to you to be able to make a purchase on account in-store, i.e. to take the product away with you then and there and pay for it later? (Top 2 boxes)

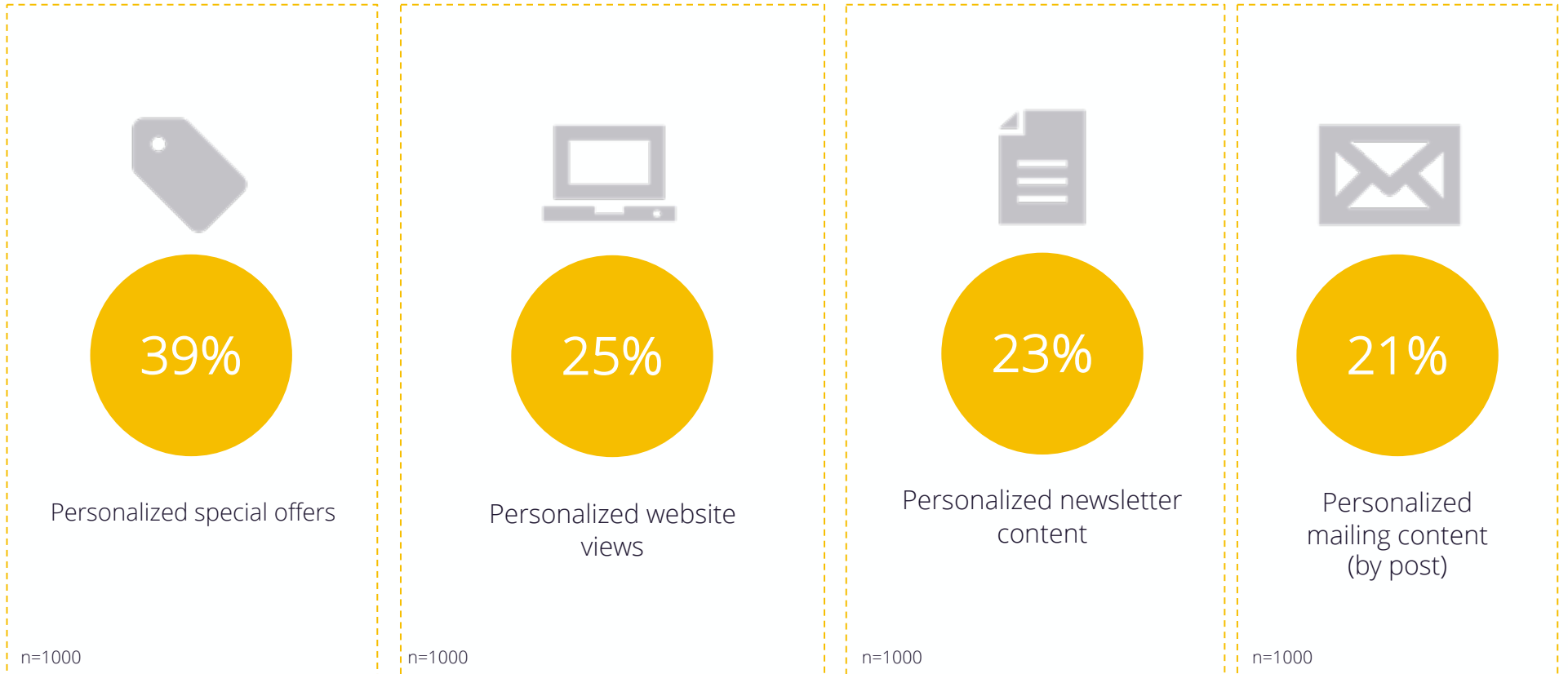
How important is it to you to be able to use mobile payment in the retailer's store (i.e. payment via smartphone in-store, e.g. with Google Pay, Apple Pay or TWINT)? (Top 2 boxes)

Consumer survey

Among personalized information especially personalized special offers are appreciated.

Scale from 6 = very important to 1 = not at all important

Importance of personalized information

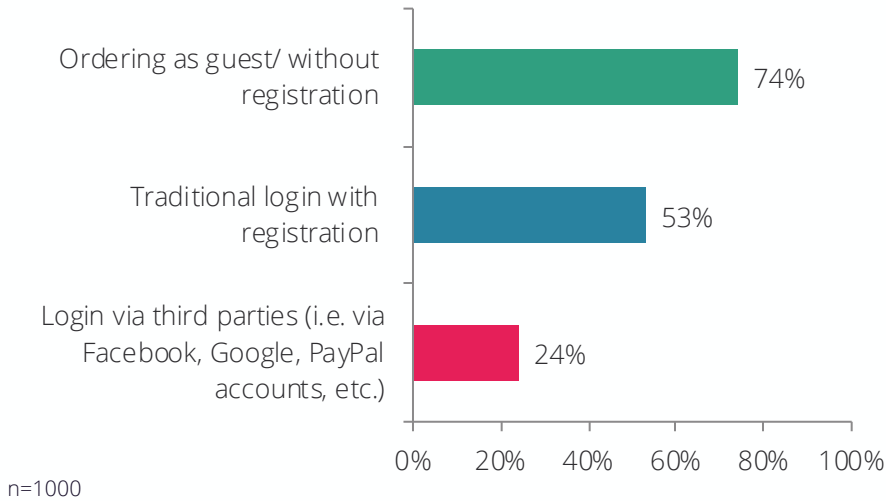


How important is it to you to receive personalized, tailored to your needs, information from retailers? (Top 2 boxes)

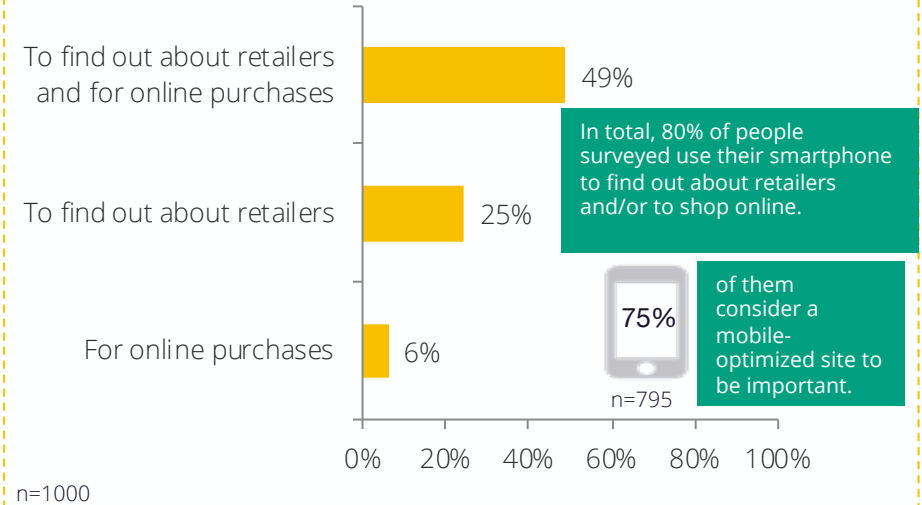
Consumer survey

Three out of four people would prefer to place an order as a guest rather than logging in. 80% of people surveyed use their smartphone to find out about retailers and/or to shop online. For 75% of these people, a smartphone-optimized website is important. A secure URL and a data protection statement are considered to be important online security measures.

Importance of registration types:



Use of smartphones:



Importance of security measures:



Scale from 6 = very important to 1 = not at all important

How important are the following online registration options to you? (Top 2 boxes)

Do you also use your smartphone to gather information about retailers or for purchasing online?

How important is it for a retailer to have a smartphone-optimized webpage, i.e. a smartphone-friendly and visible website? (Top 2 boxes)

How important is it to you that the following information is in the online shops? (Top 2 boxes)

Consumer survey

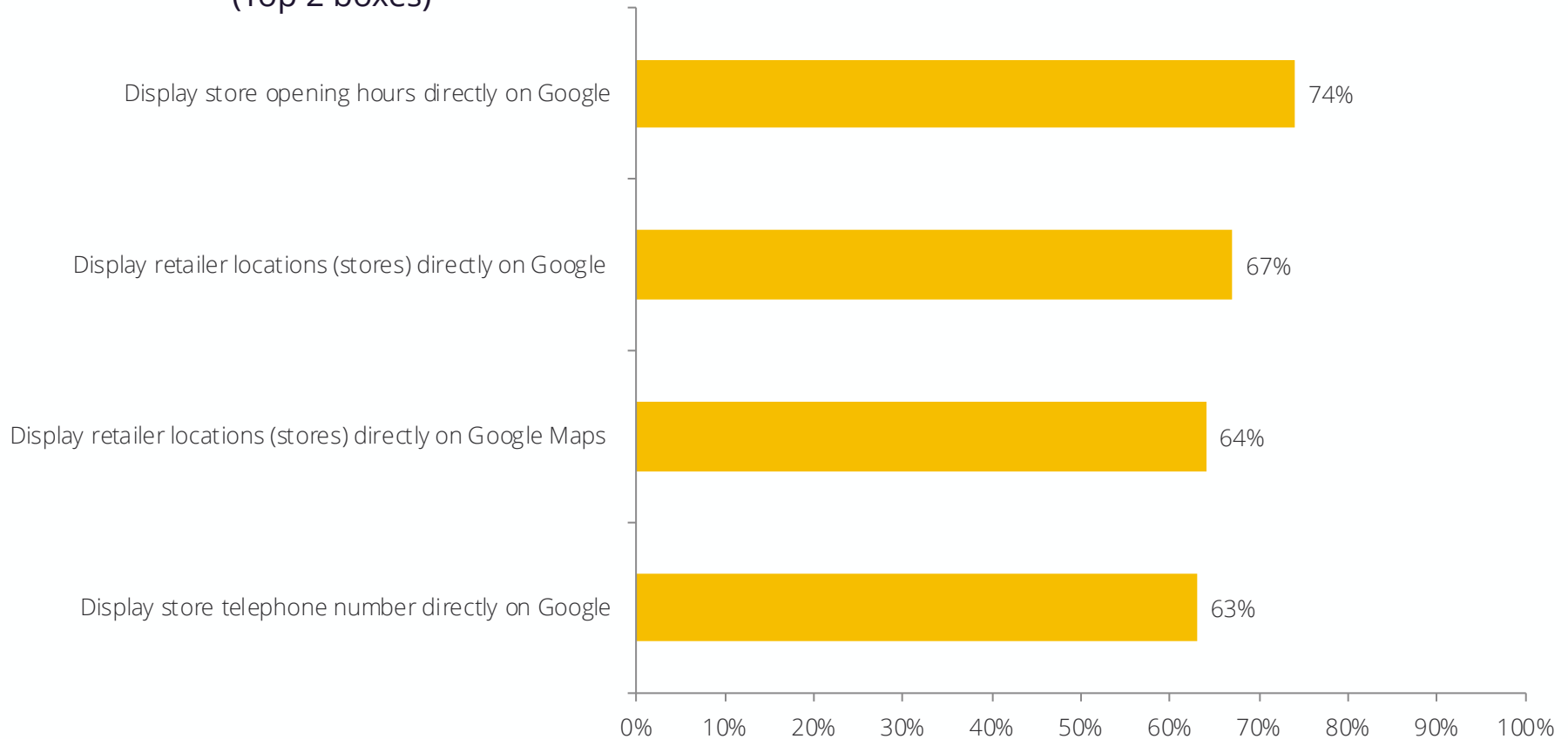
Just under three quarters consider it important to display a retailer's store opening hours directly on Google, followed by displaying the locations of a retailer's stores directly on Google (67%).

Scale from 6 = very important to 1 = not at all important



How important are the following options for you when searching for a retailer on Google?

(Top 2 boxes)

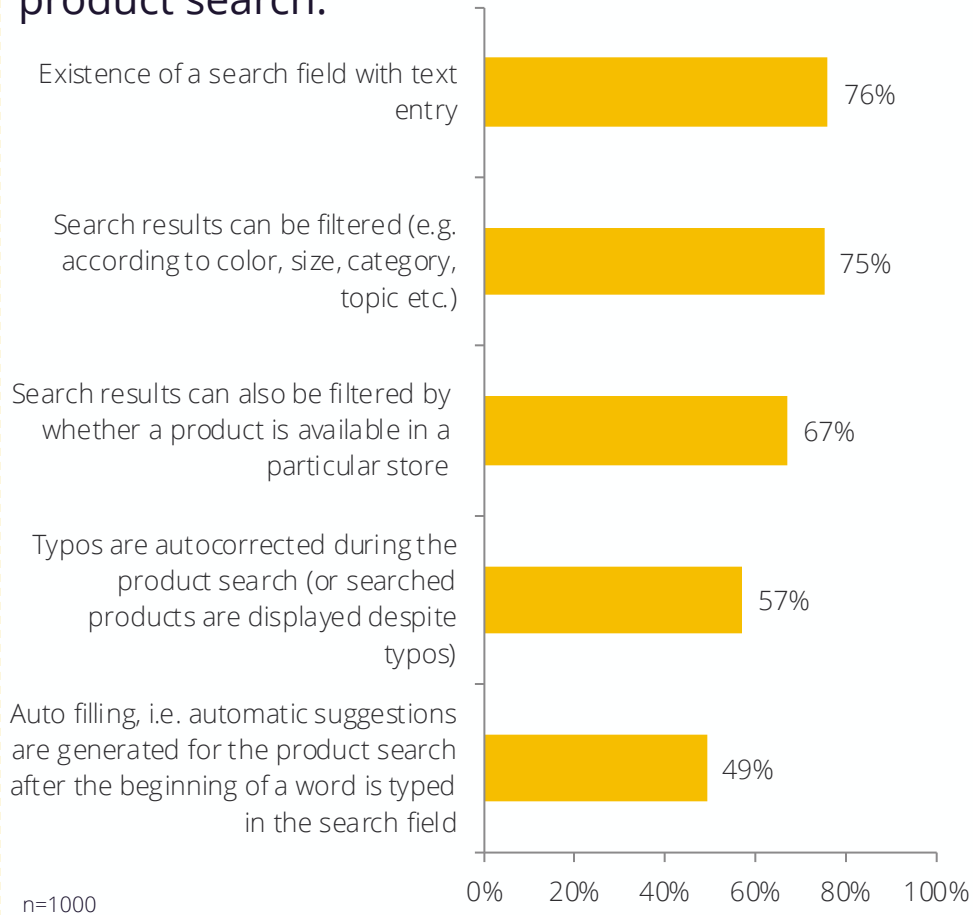


n=1000

Consumer survey

Having a search field as well as filter options are essential. The most important payment options that have been named are credit cards, vouchers and purchase on account. The shopping cart should still be there during the next visit to the online shop.

Importance of online shop features during the product search:



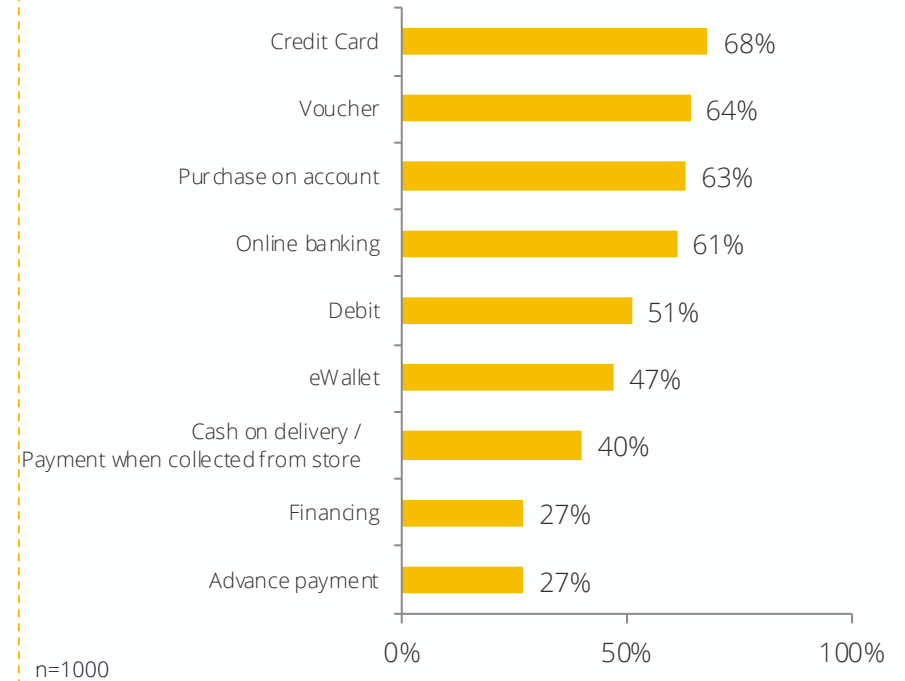
Scale from 6 = very important to 1 = not at all important

How important is it for you that the following features are available for the product search? (Top 2 boxes)

How important are the following payment options during online shopping? (Top 2 boxes)

How important is it to you to keep products in your shopping basket when you access the online store again without having to re-login? (Top 2 boxes)

Importance of payment options:



Importance of the continuing shopping cart at the next visit:



Consumer survey

On the product page, the availability display of the respective product in the online shop as well as in a particular store is very important, furthermore, people expect a zoom in option for product images. Customer reviews are important for over 50% of people surveyed.

Importance of information and functions on a product page



80%

Product availability is displayed in the online shop



74%

Option to zoom in on / enlarge the product images



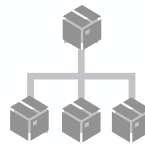
73%

Product availability in a particular store is displayed in the online shop



53%

Product reviews / consumer reviews



42%

Context recommendations (product suggestions, similar products)



18%

Option to share the product on social media

n=1000

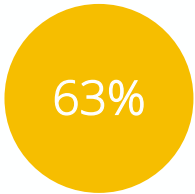
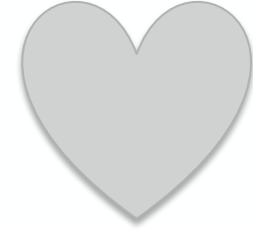
Scale from 6 = very important to 1 = not at all important

How important is it for you that the following features are available on a product page? (Top 2 boxes)

Consumer survey

More than 60% use wish lists/watch lists for saving products, 25% of the people who use watch lists actually share them with others. Accordingly, being able to share a wish list is far less important than the general possibility of using one.

Use and importance of wish lists / watch lists



make use of the option in online shops to **save products to a wish list** / watch list

n=1000



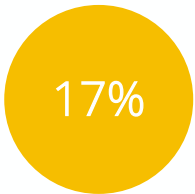
make use of the option in online shops to also **share their wish list with others** (e.g. via social media, by email, etc.)

n=633



think it is important to be able to save products to a watch list / wish list in online shops

n=1000



think it is important to also be able to share the watch list / wish list

n=1000

Scale from 6 = very important to 1 = not at all important

Do you make use of the option in online shops to save products to a watch list/wish list (if available)?

Do you make use of the option in online shops to also share your wish list with others (e.g. via social media, by email, etc.)?

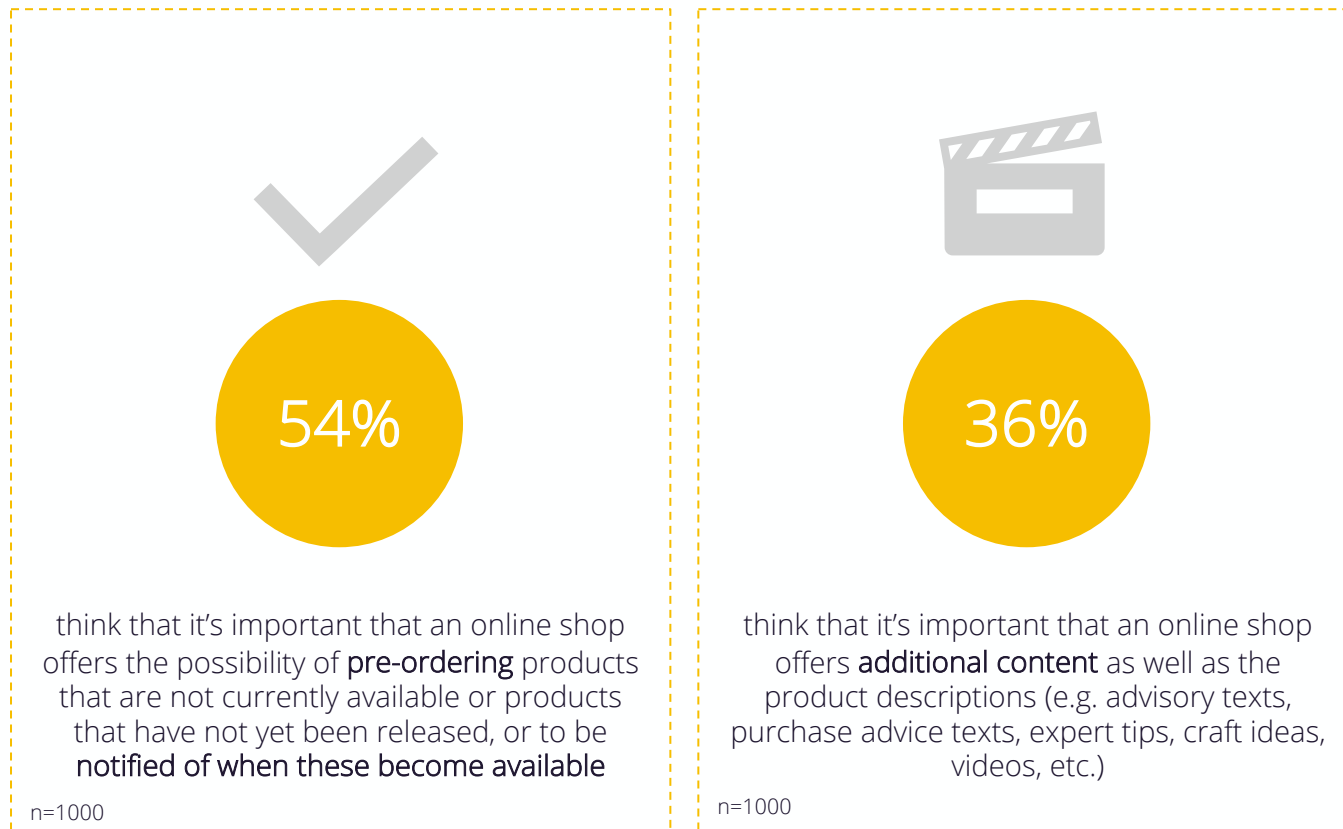
How important are the following functions to you in an online shop? (Top 2 boxes)

Consumer survey

A pre-ordering/notification option for products that are currently not available or have not yet been released is desired by 54% of people surveyed. For 36% of people surveyed, it is also important to be provided with additional content in online shops.

Scale from 6 = very important to 1 = not at all important

Importance of various online information from retailers



How important is it to you that you can pre-order products that are not currently available on the online shop or have not yet been released, or be notified when they become available? (Top 2 boxes)

How important is it to you that an online shop offers additional content as well as the product descriptions (e.g. advisory texts, purchase advice texts, expert tips, craft ideas, videos, etc.)? (Top 2 boxes)

Consumer survey

It's conceivable to 21% of people surveyed that they will use voice assistants for ordering products online in the future, a further 21% of those surveyed at least are not opposed to this. This may indeed be possible especially in the case of clothing & shoes, electronic items as well as books & music.

Level of openness to using voice assistants when shopping online



21%

of people surveyed can imagine using voice assistants (e.g. Google Assistant, Alexa, Siri, etc.) for ordering products online in the future (top 2 boxes). A further 21% of those surveyed at least are not opposed to this.

Scale from 6=Yes, I can very well imagine this, to 1=No, I cannot imagine this at all

n=1000

In which of the following product categories / at which types of retailers can you imagine making online purchases via a voice assistant (e.g. Google Assistant, Alexa, Siri, etc.) in the future?

Clothing & Shoes



54%

Electronics



53%

Books & Music



50%

n=419 (People who can imagine placing online orders via voice assistants or at least are not opposed to it)

Can you imagine using voice assistants (e.g. Google Assistant, Alexa, Siri, etc.) for ordering products online in the future? (Top 2 boxes)

In which of the following product categories / at which types of retailers can you imagine making purchases via a voice assistant (e.g. Google Assistant, Alexa, Siri, etc.) in the future?

Consumer survey

The retailer's loyalty program is considered important mainly for collecting discounts and points.

Scale from 6 = very important to 1 = not at all important

40%

think it is important that a retailer offers a loyalty program

51%

think it is important to be asked about their membership with the customer club when placing an order or registering in an online shop

47%

think it is important that a retailer communicates their customer loyalty program in the online shop / on the website

n=1000



70%

see **discounts and collecting points** as the main benefit of customer loyalty programs

20%

see **individualized special offers based on their own spending habits** as the main benefit of customer loyalty programs

10%

see **personalized approaches in newsletters, mailings and on the website** as the main benefit of customer loyalty programs

n=705 (people who think customer loyalty programs are important or are quite important)

How important is it to you, in general, that a retailer offers customer loyalty programs? (Top 2 boxes)

How important is it for you to be asked when placing an order or registering in an online shop if you are a member of the customer club and can provide your customer card number to receive benefits? (Top 2 boxes)

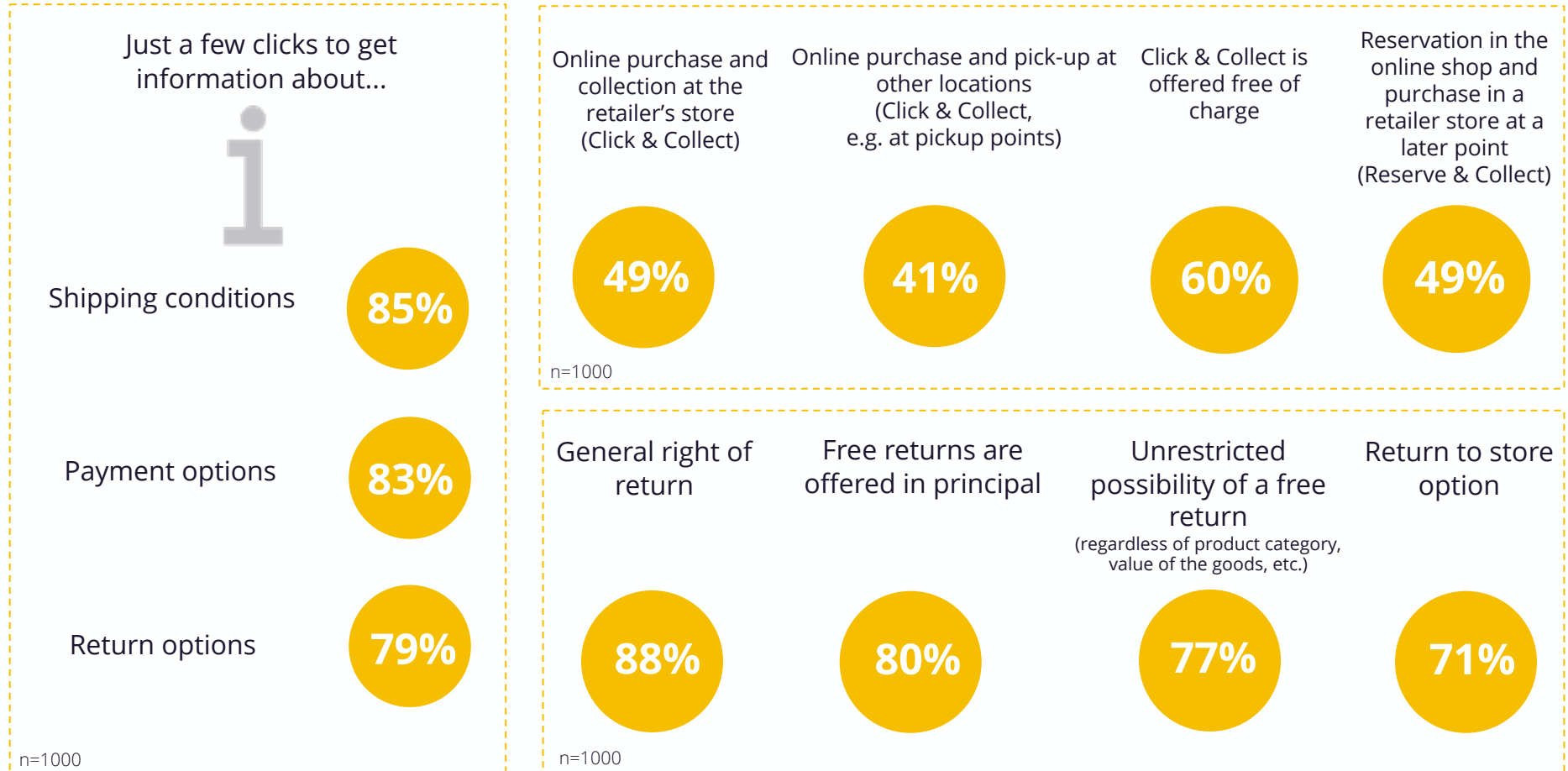
How important is it for you that a retailer communicates their customer loyalty program in the online shop / on their website? (Top 2 boxes)

Which advantages are most important to you in customer loyalty programs? (Display of 1st rank)

Consumer survey

During purchasing, information about shipping and payment options and returns that can be found quickly is particularly important. A general right of return and the option of free returns are required by almost all customers. Click & Collect and Reserve & Collect are becoming more popular and are considered to be important by just under 50% of the people surveyed.

Importance of information in the online shop, order and return options Scale from 6 = very important to 1 = not at all important



How important is it to you to easily receive information about the shipping conditions, payment options and return options, i.e. with just a few clicks, before you buy? (Top 2 boxes)

How important are the following order options to you? (Top 2 boxes)

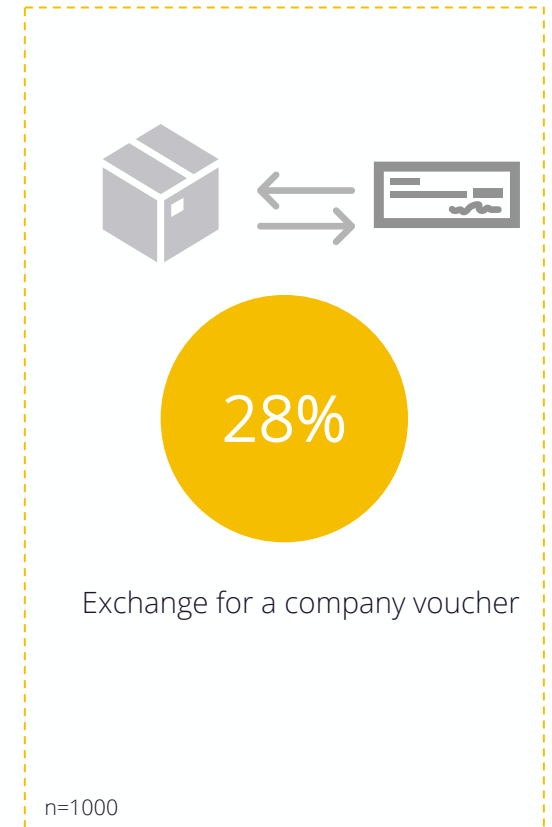
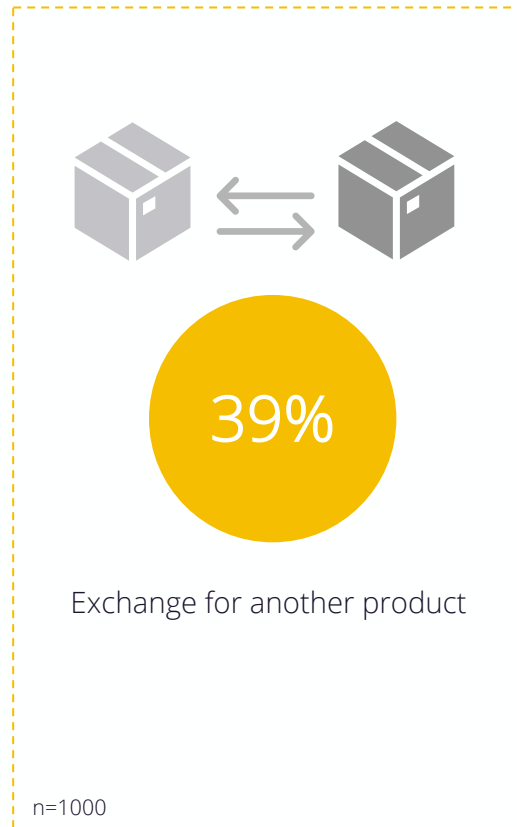
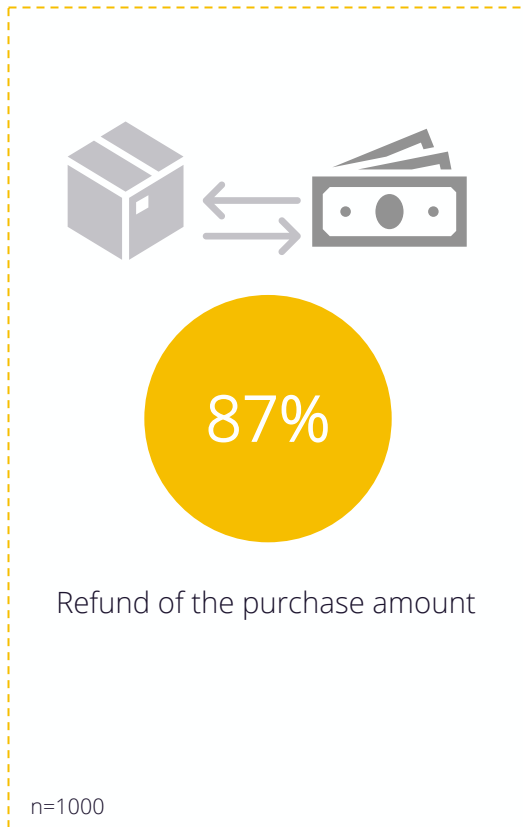
How important are the following options, when looking at returns? (Top 2 boxes)

Consumer survey

More than 85% would like a refund of the purchase amount in case of returns, the possibility of an exchange for another product is important for almost 40%.

Scale from 6 = very important to 1 = not at all important

Importance of refund options



In case of returns, how important are the following refund options to you? (Top 2 boxes)

Consumer survey

It is important for nearly 90% of those surveyed that an online shop has the possibility of free delivery. For 62% of people surveyed, another decisive factor is different delivery speeds (e.g. express) or fast standard delivery times. It is also essential that the delivery time is specified in the online shop.

Scale from 6 = very important to 1 = not at all important

Importance of different delivery options



86%

think it is important that free delivery is offered in principal

79%

think it is important that a free delivery is possible without restriction (regardless of product category, value of the goods, etc.)

62%

consider it to be important that there are different delivery speeds (e.g. there is also an express delivery option) or that standard deliveries can be made very quickly (within 1-2 working days)

36%

consider it to be important that delivery is possible on the same day on which the order was placed (same day delivery)

n=1000

Importance of specifying delivery times



81%

Delivery time is indicated

69%

Specific day of delivery is indicated

63%

Delivery time is indicated separately in the shopping cart for each product

57%

Specific delivery window is indicated

n=1000

Return time window



63%

feel that a return window of **up to 14 days** after delivery is sufficient

94%

feel that a return window of **up to 30 days** after delivery is sufficient

n=1000

How important are the following delivery options to you? (Top 2 boxes)

How important is it for you to know the period or specific day of delivery and the time window before you purchase a product and that the delivery period is specified separately in the shopping cart / on the order page for each product before you order? (Top 2 boxes)

How much of a time window do you consider sufficient for returns (i.e. to return goods that you have ordered in an online shop)?

Consumer survey

More than two thirds of consumers want the same product range and prices both online and offline. Being able to redeem vouchers across all of the channels is essential. The option of having products from other stores delivered to the selected store is popular.

Scale from 6 = very important to 1 = not at all important

Importance of the same product range, online and offline



70%

Importance of having the same price online and offline

CHF

77%

Importance of having the option to redeem vouchers both online and in-store



79%

n=1000

Importance of various services in the store

How important are the following services in the retailer's store to you? (Top 2 boxes)



n=1000

How important is it to you that a retailer offers the same product range online and in the store? (Top 2 boxes)

How important is it to you that a retailer offers the same price for products in their online shop and in the store? (Top 2 boxes)

How important is it to you to be able to redeem a retailer's voucher both online and offline? (Top 2 boxes)

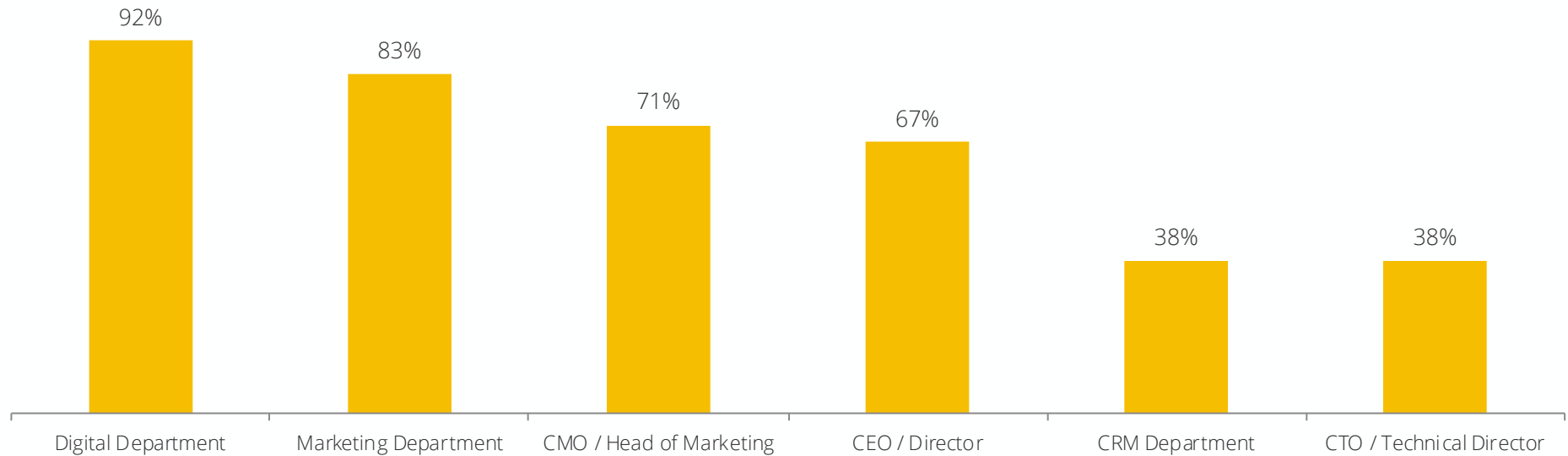
Retailer survey

Retailer survey

83% of companies surveyed say they have looked at the results of the Omnichannel Readiness Index 1.0

n=29

Which departments have dealt with the ORI?



n=24 (companies that used the ORI 1.0)

Have the results of the Omnichannel Readiness Index been viewed, discussed, analyzed, etc. at your company, or have you processed the results in any way?
Which departments or persons within your company were interested in or have dealt with the results of the Omnichannel Readiness Index? (Multiple answers)

Retailer survey

What has the Omnichannel Readiness Index achieved or changed in your company?

"We have become more aware of omnichannel interrelationships, the fact availability of goods in each store can also be used in advertising (Google local inventory ads) and delivery times can be specified more precisely for each item (also for externally procured long-tail ranges)."

"A structured analysis of the benchmarks – a critical self-assessment – improvement potential is largely implemented."

"It's given us a new perspective on the subject, especially when it comes to the details."

"A better overview of the retail market and higher importance of product availability and delivery times."

"An incentive to do even better and defend our position on the market."

"The customer journey was questioned. The customers' needs which we have to prioritize."

"Input for internal reorganization, even better awareness of omnichannels, readjusting the procedure for online services."

Retailer survey

What has the Omnichannel Readiness Index achieved or changed in your company?

"It's given us a good benchmark and overview to better classify your own services."

"Market information, market observation."

"It's strengthened us in our strategy that there is still no retailer in Switzerland that has mature omnichannel processes in place. We will work hard on the strategy (...) and do everything we can so that we (...) can offer the best omnichannel shopping experience."

"As a result, we have a new strategy in place."

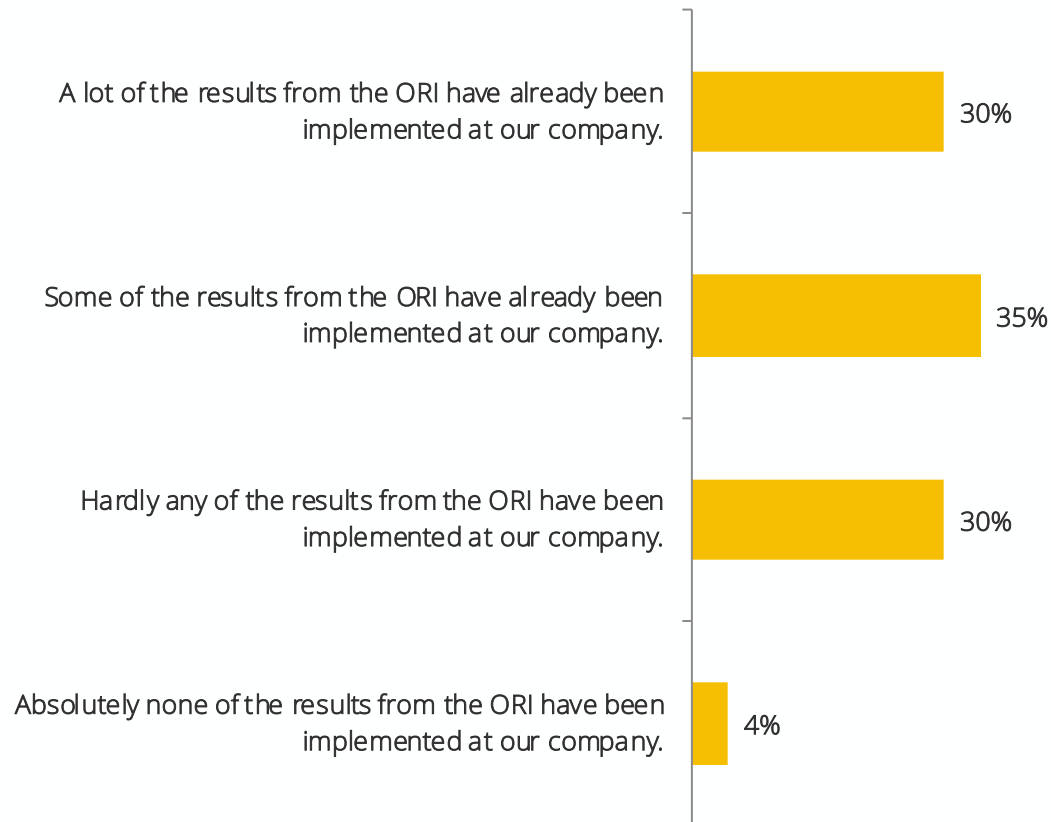
"Comparison of best practice approaches have been incorporated into projects for further development."

"It has accelerated the process of development and improvement."

"We've improved on the areas in which we received low scores."

Retailer survey

Now we would be interested in your assessment: Has your company already implemented many of the results from the Omnichannel Readiness Index?



n=23 (companies in which the ORI 1.0 was used)

Retailer survey

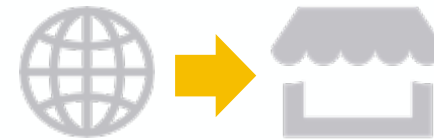
References between stores and online shop are provided by nearly all retailers.

Alert in the stores
about the online shop



n=29

Alert in the online shop
about events or offers in stores



n=29

Do you refer to the online shop in your retail stores, for example by using stickers, displays, banners, etc.?

Are various events that take place in the stores or offers that are available in the stores advertised in the online shop?

Retailer survey

The checking of product availability (online & in-store) by employees is possible with almost all retailers, and delivery to the selected store is often possible. Combining the online/offline experience is also offered by the majority of retailers.

Options offered by staff in the stores

Which of the following options do your staff have available to them in the stores of your company?



Ability to check availability of products online

97%



Ability to check whether other stores have certain products

86%



Have products from other stores delivered to a selected store

69%



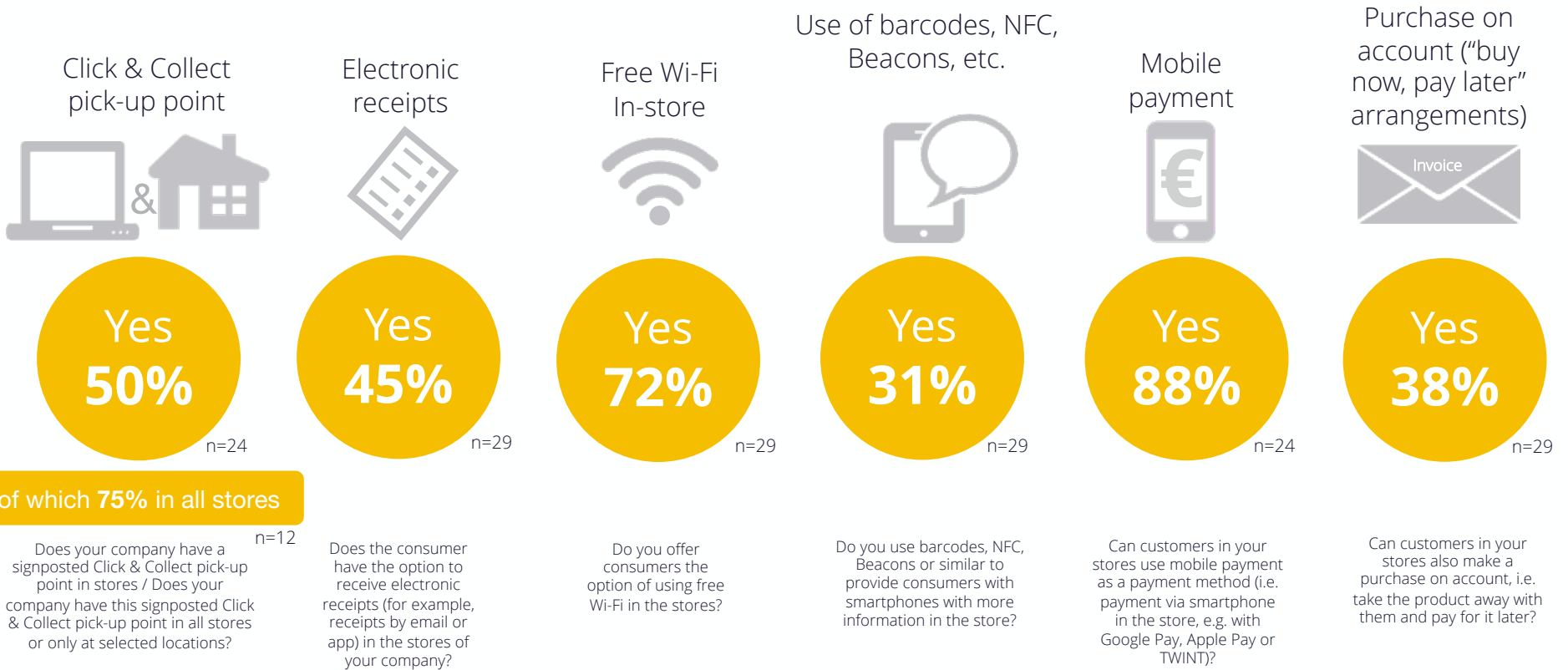
Provision of tablets or terminals in the store to connect the online/offline experience

76%

Retailer survey

Digital in-store networks are partially developed, in particular the use of barcodes, NFC and beacons to supply the customer with additional information via smartphone is even less widespread. Mobile payment is offered by most retailers.

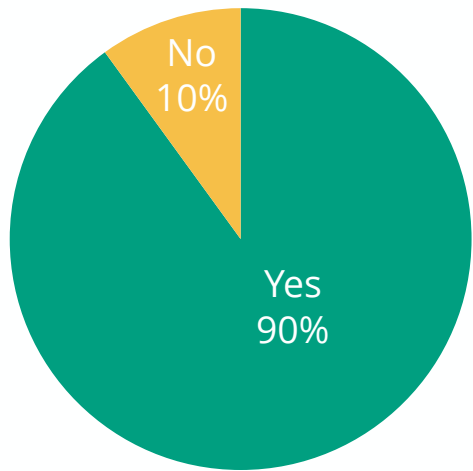
In-store offers



Retailer survey

Consumer data is used for personalized advertising by most retailers, mainly for personalized mailing content.

Consumer data/CRM use for personalized advertising



Do you use consumer data/CRM for personalized advertising?

Yes



What type of personalized advertising?

personalized mailing content 92%

n=26

personalized special offers 73%

n=24

personalized newsletter content 69%

n=26

programmatic marketing 68%

n=22

personalized website views 21%

n=22

Retailer survey

Over 75% of the retailers also offer additional content in the online shop as well as product descriptions. Almost all retailers allow a refund of the purchase amount in case of returns.

Additional offers and refund options

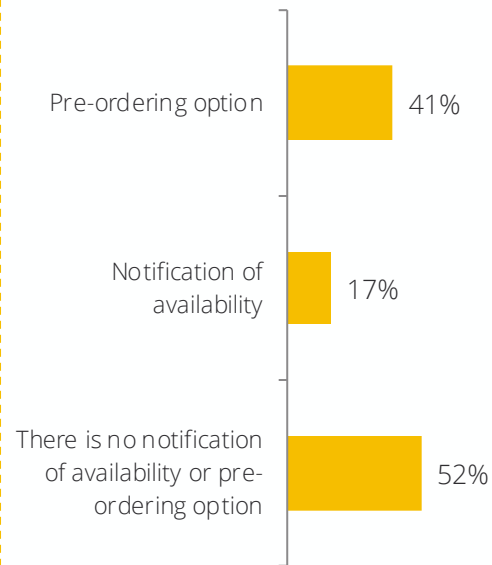
**Additional content in online shops
(e.g. advisory texts, videos, etc.)**

76%

of the retailers surveyed offer additional content in the online shop as well as product descriptions

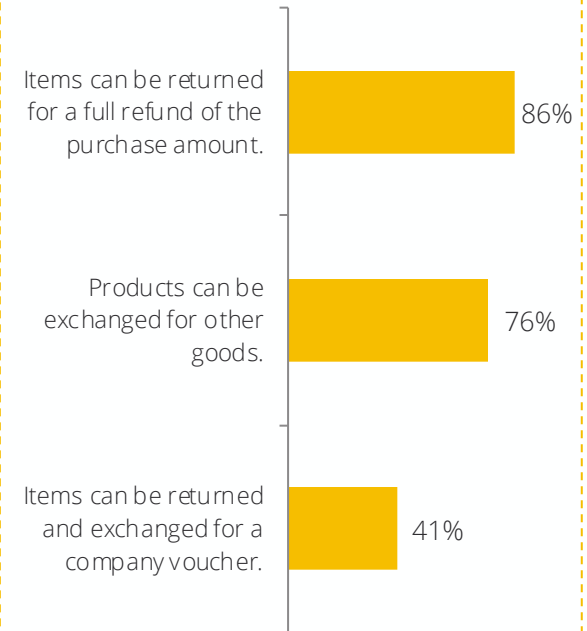
n=29

Availability notification or possibility to pre-order products that are currently not available or have not yet been released



n=29

Refund options in case of returns



n=29

Do you offer additional content in your online shop as well as product descriptions (advisory texts, purchase advice texts, expert tips, craft ideas, videos, etc.)?

Is it also possible to pre-order products or request an availability notification at your company if products are currently out of stock or have not yet been released? (Multiple answers)

What refund options does your company offer in case of returns? (Multiple answers)

Retailer survey

Loyalty points or rewards can be collected from all surveyed retailers who have a customer loyalty program, both online and in-store. Promotional vouchers are mainly offered by email or newsletter and on the website as well as in-store and are predominantly redeemable both online and offline.

Loyalty programs



Promotions



Does your company have a customer loyalty program? / Is there an option to collect loyalty points/rewards across all channels, i.e. both online and in the store?

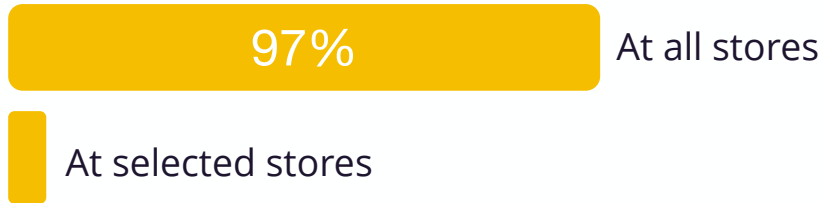
Does your company offer promotional vouchers? If yes, how do consumers get them?

How are promotional vouchers redeemed at your company?

Retailer survey

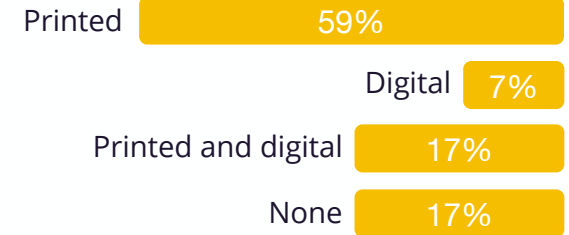
Returns are almost always possible in all stores. A large part of the in-store product range is also available online. Most retailers offer certain products only in the online shop. For most retailers, there are no price differences between products offered online and in-store.

Submission of returned goods



n=29

Confirmation for the submission of the return

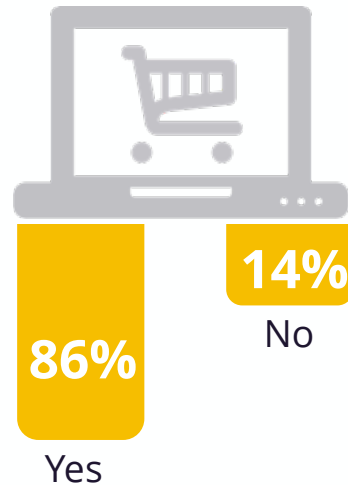


87%

of the in-store product range is on average also available online at the retailers surveyed.

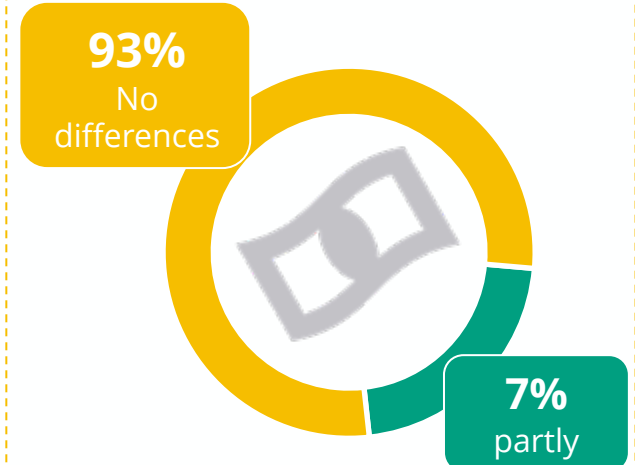
n=29

Products only available online?



n=29

Price differences online vs. offline?



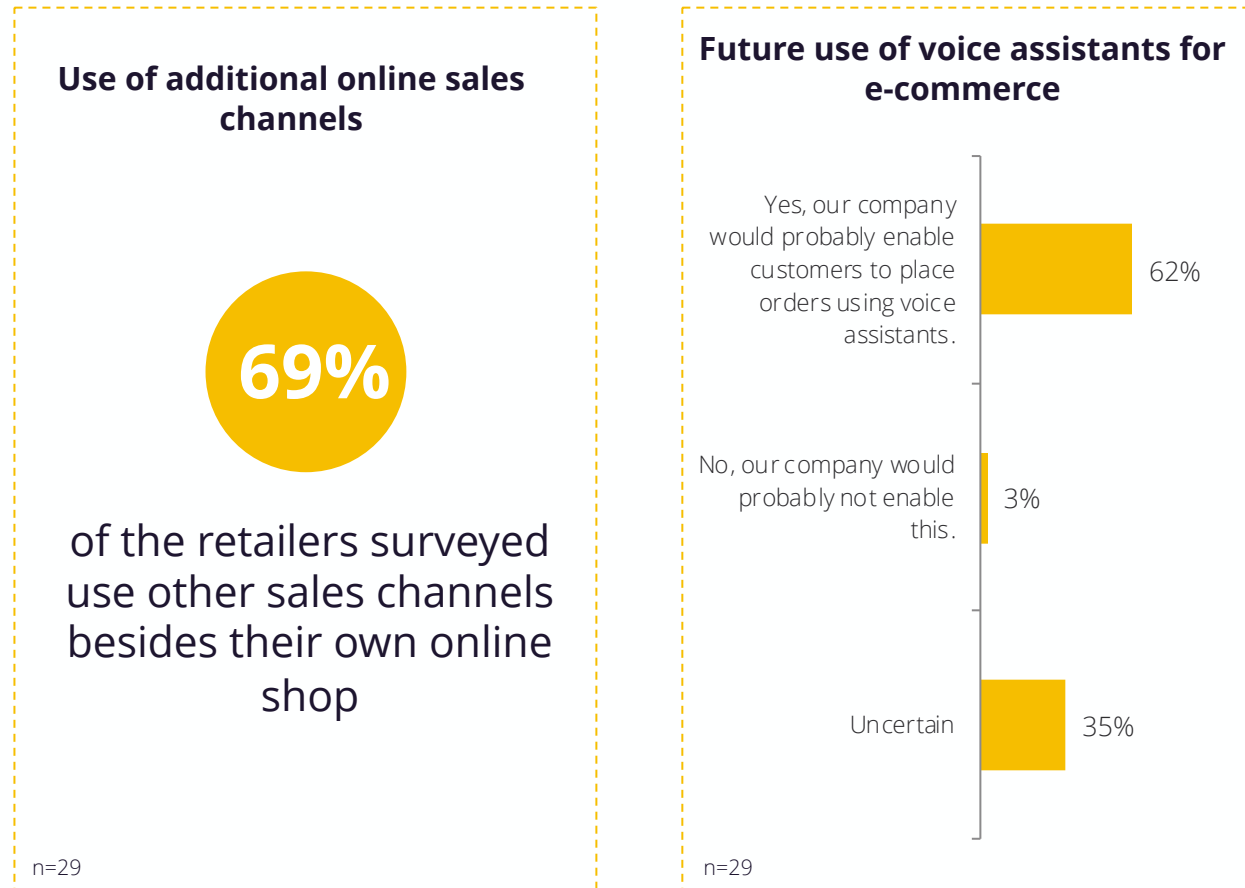
n=29

- Can items be returned in your company stores?
- Do the customers in-store receive a confirmation for the submission of returned goods?
- What percentage of your in-store product range is also available online? (Median)
- Are there products that your company only sells online?
- Are online prices different from the in-store prices?

Retailer survey

More than two thirds of retailers use additional online sales channels in addition to the online shop. For the majority of companies, the future use of voice assistants in e-commerce, i.e. enabling orders to be placed online using voice assistants, is also likely.

Use of additional online sales channels and future use of voice assistants



Does your company use other online sales channels (e.g. online marketplaces) apart from your online shop?

In recent years, voice assistants have become increasingly popular – programs that can understand and execute voice commands. If it becomes possible to use voice assistants (e.g. Google Assistant, Alexa, Siri) for e-commerce in the future, would your company be willing to enable customers to place orders using these voice assistants?

Retailer survey

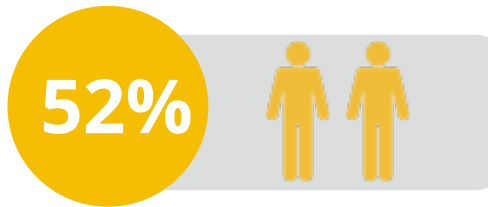
A good 50% of the companies employ omnichannel managers and have employees dedicated to data analytics and big data. Approx. 60% of the companies indicate that they have separate responsibilities for e-commerce and in-store sales.



52%

of the retailers surveyed have an omnichannel manager in the company

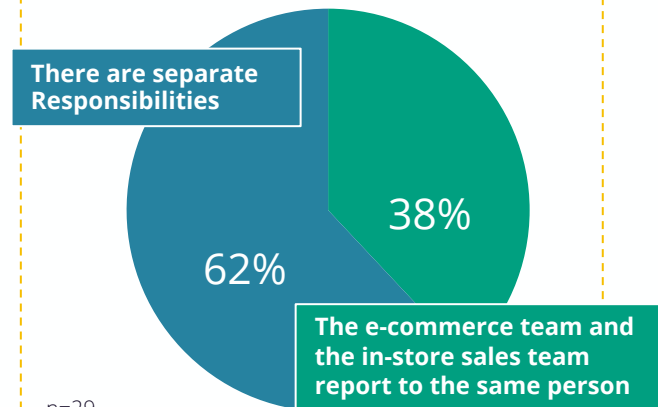
n=29



of the retailers surveyed have people/teams in the companies dealing exclusively with big data, data analytics and website behavioral data

n=29

E-commerce responsibilities



n=29

Is there an omnichannel manager in the company?

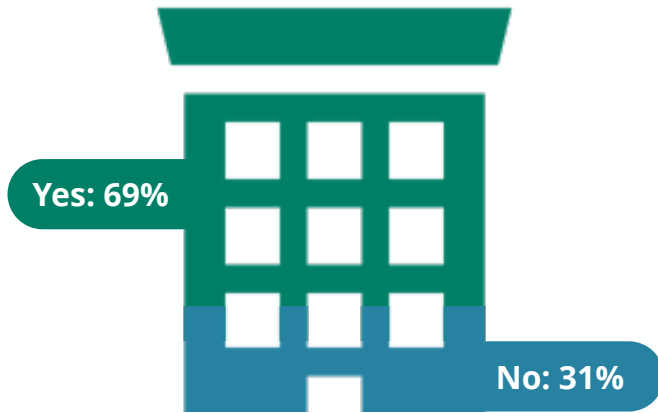
Do you have people/teams dealing exclusively with big data, data analytics and website behavioral data?

Do the e-commerce team and the in-store sales team report to the same person in your company or are there separate responsibilities for these areas?

Retailer survey

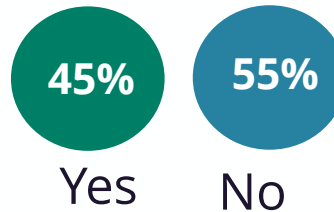
E-commerce is often run as a separate cost center in the company. Nearly 50% of retailers assign online sales to stores regionally. In-store sales still account for most of the turnover.

E-commerce department
as
separate cost center



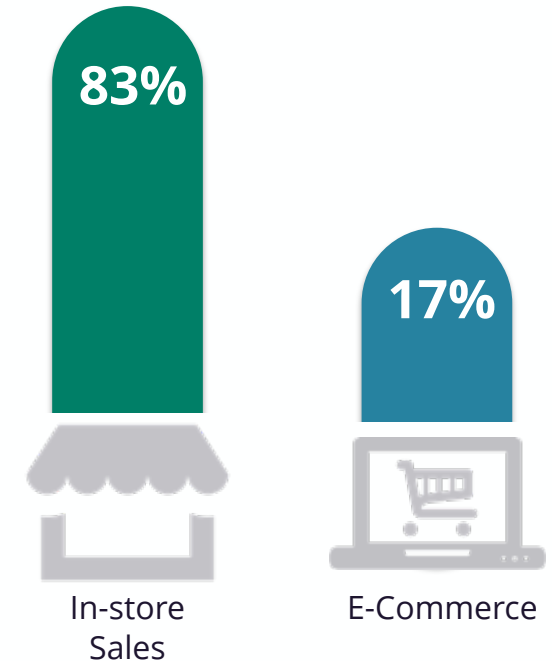
n=29

Assignment of
online sales to
the stores



n=29

Revenue ratio
(average value)



n=25

Is the e-commerce department run as a separate cost center/profit center in your company?

Are sales from the online shop assigned to stores, e.g. using regional assignment based on delivery address?

Please indicate the ratio of your sales in e-commerce to sales in brick-and-mortar stores. (average value)

Retailer survey

Investment is mainly in traditional advertising methods. Information regarding the availability of stock can be accessed in real time at 86% of retailers, but only 39% use stock availability data for local online advertising.

Distribution of the media budget



n=29



Digital



Traditional

n=19

Stock availability and online advertising

Stock availability can be updated in real time

n=28

86%

Stock availability data is used for local online advertising

n=28

39%

Use of online campaigns to drive in-store sales

n=25

64%

Is the media budget in your company divided into a part for traditional advertising and a part for digital advertising?

What percentage of the media/advertising budget in your company do you invest in digital advertising? (average value)

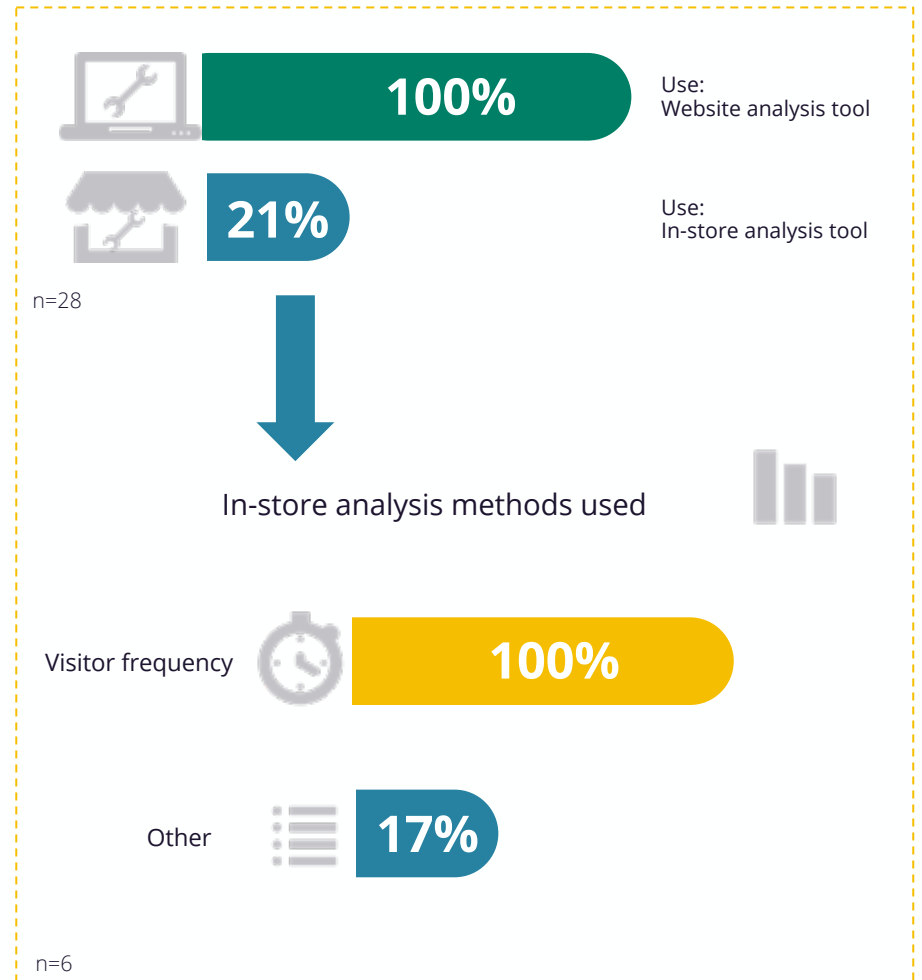
Does your company have the ability to update stock availability in real-time (at least once per day)?

Is information and data regarding stock availability in your company stores also used for local online advertising (e.g. Google local inventory ads)?

Are online campaigns used in your company to drive in-store sales (e.g. Google local campaigns)?

Retailer survey

Half of retailers measure contact with digital advertising media and a subsequent visit to the store, evaluating a purchase made in-store after contact with digital advertising media shows potential (43%). Website analysis tools are used considerably more than in-store analysis tools.



Do you measure in your company whether someone who has been in contact with digital advertising material visited one of your stores?

Do you measure in your company whether someone who has been in contact with digital advertising material then actually purchased something in your stores?

Do you use a tool to interpret consumer behavior on your website?

Do you use tools to analyze consumer behavior in your stores?

Which in-store analysis methods does your company use?

Desk Research – List of Criteria per Category

Category *User Navigation*



Search field with text entry

Findability of the search field

Smartphone-optimized website

Loading time of the mobile website

Filter feature (e.g. according to color, price, category)

Possible to buy as guest

Traditional registration / registration with customer card possible

Login via third party providers (Facebook, Google or Paypal accounts) possible

Possibility of website translation

Shopping cart is not lost even after closing the browser

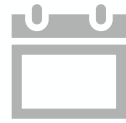
Search field autofill function

Autocorrect of typos during the product search

Possible to zoom in on / enlarge product images

All information (including store locations) to be present on one website (= in the online shop)

Category Information, Transparency & Security



Information about shipping conditions is available (desktop / mobile)

Information about shipping conditions can be found quickly (desktop / mobile)

Information about payment options is available (desktop / mobile)

Information about payment options can be found quickly (desktop / mobile)

Information about return options is available (desktop / mobile)

Information about return options can be found quickly (desktop / mobile)

Delivery time is indicated

Specific day of delivery is indicated

Time of delivery or delivery window (in hours) is specified

Delivery time is indicated separately in the shopping cart for each product

Product availability is displayed in the online shop

Publication details

Data protection statement

Website URL contains "https"

Quality seals

FAQs

Newsletter is offered

Category Contact Options

Email address

Contact form

Telephone hotline (desktop / mobile)

Telephone hotline easy to find (desktop / mobile)

Option of requesting a callback from the retailer

Live chat / Chatbot

Whatsapp

Links to social media channels



Category Fulfillment & Payment



Debit (e.g. PostFinance card, debit note, direct debit, VISA Electron)

eWallet (e.g. PayPal, Amazon Pay, TWINT, Google Pay)

Credit card (e.g. VISA, Mastercard)

Cash on delivery / payment when collected from store

Online banking (e.g. direct transfer, PostFinance E-Finance)

Payment on account (e.g. the retailer's own account, Whitelabel, Billpay, paycard, Klarna)

Advance payment

Financing (hire purchase)

Voucher (value coupon, gift voucher, gift card, etc.)

Different delivery speeds are offered (e.g. standard and express delivery) or standard delivery is possible within 1-2 working days

Possible for item to be delivered on the same day it was ordered

Free delivery is offered in principal

Unrestricted possibility of a free delivery (regardless of order value or product category, etc.)

Click & Collect at pick-up locations, collection points, etc. is possible

Click & Collect is free of charge

General right of return available

Length of window for returns

Free returns are offered in principal

Unrestricted possibility of free returns (regardless of order value or product category, etc.)

Category Loyalty & Sharing

Product Reviews / Consumer Reviews



Wish list / watch list

Option to share wish list (e.g. via social media, email, etc.)

Questioned about loyalty card / loyalty program (e.g. entry field for customer number)



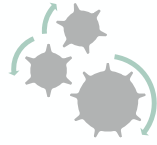
Loyalty program is communicated in the online shop

Contextual recommendations (e.g. "similar products", "customers also purchased...")

Social Media Sharing Option for products



Category Channel Integration



Filter function based on store availability (option of filtering displayed products according to whether they are available in a particular store)

Products that have been ordered online can be returned to the store

Click & Collect with pick-up in the retailer's store

Reserve & Collect (reservation in the online shop and pick-up in the retailer's store)

Product availability in store is shown in the online shop

Store finder easy to find (desktop / mobile)

Search field for store search available (desktop / mobile)

Stores are displayed in a list (desktop / mobile)

Store list can be filtered (desktop / mobile)

Stores are displayed on a map (desktop / mobile)

Map to display the stores can be filtered (desktop / mobile)

Store telephone numbers available in the online shop (desktop / mobile)

Click-to-Call is possible with the telephone numbers of the stores (desktop / mobile)

Geolocation for determining user's location (desktop / mobile)

Route planner to the store (desktop / mobile)

Store opening hours are specified

Company information available on [Google my Business](#)

Store telephone numbers available on [Google my Business](#)

Store opening hours available on [Google my Business](#)

Store network available on [Google Maps](#)



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