

# Online Retailer Survey 2022

## Success Factors and Omnichannel Services in Digital Commerce

A study by the E-Commerce Lab  
at the Institute of Marketing Management

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With a foreword  
by Gerrit  
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# Management Summary

The Swiss Online Retailer Survey 2022 is the fifth online retail survey the first author has conducted. A total of 625 online retailers participated in it, including business-to-consumer (88%), business-to-business (43%), and direct-to-consumer (13%) companies. In addition to 496 Swiss retailers, 109 Austrian online retailers also took part in the representative survey. After the boom in e-commerce in 2020 and 2021 due to the corona pandemic, normality has returned for many retailers. A large proportion of the online retailers surveyed mentioned that the lifting of the Coronavirus measures had no impact on their online business. Some report that they have seen a slight to strong decline in online sales and fewer online orders compared to the previous year.

The study confirmed that online retailers are very broadly positioned in distribution and often sell through multiple sales channels such as online shops, physical stores, face-to-face sales and over-the-phone sales. Digital sales channels such as digital marketplaces (e.g., Digitec Galaxus and Amazon) and social commerce (e.g., Facebook marketplace and Facebook and Instagram shops) continue to grow. The results show that omnichannel retailers often offer both a broader range (with more product categories) and a deeper assortment (with more products in one category) online than in their physical stores.

In the 2022 survey, the authors examined the success factors in e-commerce were examined for the first time: most frequently cited was the quality of the products or services offered, followed by their exclusivity. The analyses show that large, professional, and successful online shop operators are much more customer-oriented than the small and unsuccessful ones, and that they attach greater importance to user-friendliness, i.e., an optimal user experience in the online shop. A/B and multivariate tests are therefore used much more frequently by the successful and larger online shops than by the smaller ones. In digital marketing, they use them to optimize their advertising materials, call-to-actions, product pages, and the layout and ordering process in the online shop. For almost half of the large online shops, good digital marketing is a success factor; among the smaller ones, only one out of four reports that it is. Therefore, the large online retailers more actively use a broader range of marketing tools such as search engine marketing, newsletters, and social media marketing. In B2B, high product availability is also often critical to success. The study also shows that many retailers can and should further expand their online product ranges, as almost half of the online shops offer a small assortment of 999 items or fewer.

Looking at the e-commerce key figures, the conversion rate, i.e., the proportion of web shop visitors who place an order, is often low (below 3%) in the clothing, furniture, electronics, toys, and sporting goods sectors. Computers and event tickets often have a high conversion rate of over 8%. The results also show that successful online shops practically always have a higher conversion rate than the unsuccessful ones. The often-discussed return rate is very low for many retailers, below 1%. In particular, books, cosmetics, food, and toys are very rarely returned. Only in the product category of clothing and sporting goods is the return rate very high, often over 20%.

The big challenges in e-commerce are currently in procurement and in the level of competition in the market. Some products are no longer available from manufacturers, importers, or large suppliers; international supply chains have been partially interrupted or have become slower. More than half of online retailers currently complain about rising fuel and logistics costs. The Ukraine war and inflation are also causing purchasing, logistics, and sales prices to rise. In general, long delivery times, delays, products that cannot be delivered, and shortages of raw materials are the most frequently cited problems. Many online retailers are also challenged when it comes to staffing levels due to the lack of skilled workers and expertise.

In terms of payment methods, mobile payment continues to gain ground: TWINT eclipsed payment on account among Swiss online merchants in 2022, becoming the second most important payment method in Switzerland after credit cards. In Austria, Klarna has also made strong gains in market share on both the customer and merchant sides.

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# Foreword by Gerrit Heinemann

Online retailers went into 2022 in an initially very positive position. The global pandemic and the measures enacted to address it led to an unprecedented boom in online trade in 2021. In that year, net turnover of goods in e-commerce had once again seen a nearly double-digit rise, 9.9%, to around 14.4 billion Swiss francs, putting the online trade volume at over 15% of total retail trade. While in the first weeks of 2022 it looked as though this trend would continue, the reality played out quite differently.

The war in Ukraine not only led to a general demand shock and decline in the retail trade, but, moreover, an entirely unpredicted flattening of the online curve. As Swiss Retail reported towards the end of the second quarter, online shopping in Switzerland also saw a significant downturn in the first quarter of 2022. All the Swiss Retail Federation's index data analyses confirmed this picture and showed that consumers in Switzerland had made fewer purchases in online shops across practically all sectors. But it got worse. The Swiss Retail Federation also confirmed a decline of around six percent in Swiss eCommerce for the first half of 2022. There is no doubt that consumers replaced some of their consumption in the retail trade due to the somewhat strict measures in other economic sectors. That consumption is now slowly falling out of retail trade turnover, and this is having an impact on online trade. Nonetheless, consumption indices are still deteriorating almost daily, giving every indication that we are still stuck in demand shock. The threat of a recession is in the air. Whether it will really come to that depends on the further course of the Ukraine war. Additionally, there is the ongoing supply problem, especially for goods from China. Both are huge uncertainties that make the situation unpredictable for trade.

Taking all these factors into account, online retailers are affected by this situation no more and no less than traditional retailers. An industry that has become accustomed to unending growth must first understand that it, too, is not immune to a demand shock. Certainly, some will have a hard time coming to terms with this situation, but compared to traditional retail, online retail would appear to be much more crisis-resistant. After all, online trade is much less dependent on fixed costs and e-commerce has many variable cost components that can be adjusted when sales go down. Brick-and-mortar stores do not have this option.

Certainly, we should not get alarmist and start proclaiming the death of online retail. Remember that this study still projects growth in online retail of around 5% this year. On the back of the strong growth of the pandemic years, this is not a forecast that spells instant doom for this market. The crucial question is how sales take off this Christmas, considering that online trade is particularly gift-oriented. At the moment, many scenarios are still conceivable. If you believe the health experts, the return of the virus is just around the corner. If that did happen in the fall or winter, online retail could see another boom. Alternatively, the pandemic might really be over, meaning that we will continue to face a supply chain problem for the time being. In turn, this would put the brakes on e-commerce. However, the traditional retail trade also has very significant unknowns surrounding it that will directly influence e-commerce growth.

The shakeout in traditional retail continued unabated, especially in the second half of 2021. The coronavirus subsidies were the last good deeds of the old government, and they were so generous that many retailers still managed a surprisingly good end to the year. But this did not stop the shakeout and now, after a brief respite, it will get going again. At the same time, a shakeout is also something that online retail needs to contend with, and always will. Even before the pandemic, we were talking about shakeout processes in e-commerce and the coronavirus made many retailers profitable once again. Now the shakeout will continue here with something of a delayed impact. The process whereby the big players expand rapidly and the small ones experience much less growth will continue. This is also confirmed by the figures in this study, and those who can no longer keep up will fall victim to market consolidation.

The same principles always apply. If you are replaceable, you have no market justification – not even online – and those who have a killer differentiation from other retailers have the advantage. It is all about creating desire and offering a unique product. Of course, the so-called homework that retailers must do also includes important housekeeping factors. A shop has to function well, otherwise it may fail. But it is no use focusing on user experience if the range is not right. What is on offer is the heart of retail, and that holds true online as well.

From the customer point of view, in particular, the attractiveness of products is by far the number one factor when it comes to choosing a particular retailer. The customer is totally product-focused, but there is a problem when there are not many desirable products on offer. That is why there is so much talk about DTC startups today and the business model is conceived based on an attractive product that draws in customers. The only online retailer that does not need to think too much about its product range is Amazon, which says more about Amazon's size and just how far ahead it is in online retail than anything else. But who else could do the same thing? The whole discussion about channels – omnichannel, physical, or online shops – is irrelevant against this background. The customer wants an attractive product and buys it where it is easiest to obtain. The customer does not mind which channel that is.

**Professor Dr Gerrit Heinemann**

Head of eWeb Research Center, Niederrhein University of Applied Sciences, Germany

Guest lecturer at Zurich University of Applied Sciences (ZHAW), Switzerland

# Foreword by Adrian Elmiger

## MOBILE PAYMENTS ON THE RISE

Worldline is taking part in the online merchant survey for the third time. As Switzerland's leading provider in the field of cashless payments across all channels, the findings from the survey are of key importance to us because they help us to adapt our products and services even better to market and customer needs.

The Zurich University of Applied Sciences (Zürcher Hochschule für Angewandte Wissenschaften, ZHAW) surveyed over 625 online merchants this year. In this study, the success factors in e-commerce were investigated in greater detail for the first time.

After two booms in 2020 and 2021, growth for most online merchants has now without a doubt weakened somewhat. The growth rates are roughly at the same level as before the coronavirus crisis.

According to the study, the quality of the products and services offered and the exclusivity of these are among some of the success factors. In addition, successful online shop operators score points with a customer-friendly user experience and optimised digital marketing measures. The payment solution is also one of the success factors. As the study shows, large and successful online merchants offer a wider selection than the average merchant.

For online merchants in Switzerland, payment by invoice, TWINT and credit cards account for the largest share of online shop sales overall. The fact that mobile payments are on the rise as a payment method is proven by the fact that TWINT and Klarna were able to gain a massive market share and importance among merchants. TWINT became the second most important means of payment in Switzerland in 2022, which was made possible not least by the strong presence of the uniform QR code developed by Worldline for online and stationary trade. But mobile payment methods like Apple Pay and Google Pay, which can be offered in e-commerce via the Worldline e-payment solution Saferpay, are also becoming increasingly popular among the online merchants surveyed this year.

As in other areas of the economy, the major challenges in e-commerce are currently goods procurement and the skilled worker shortage.

This year's findings from the study are again very exciting and show us the trends of tomorrow which will affect us all. We would like to thank all of the merchants who took part and, in particular, the authors Carmen Oswald, Claudia Brauer and Dr Darius Zumstein and the team at the Institute for Marketing Management for their commitment to retail.

We hope that you enjoy reading this and gain new and useful insights from the study.

**Adrian Elmiger**

Country Head Merchant Services

Worldline Switzerland Ltd.



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# 1. Introduction

This year's Online Retailer Survey examines success factors and omnichannel services in digital commerce as reported by 625 participating online retailers in Switzerland and Austria. Most of the participating online shops are active in the field of business-to-consumer (B2C), followed by business-to-business (B2B) and manufacturer online shops (D2C). More than half of the participants operate a small online shop with one to four employees and have a turnover of less than 500,000 Swiss francs or euros. Omni-channel and pure online commerce (pure players) remain the dominant sales models in digital commerce. As Chapter 1.5 shows, a wide variety of industries are represented in the study.

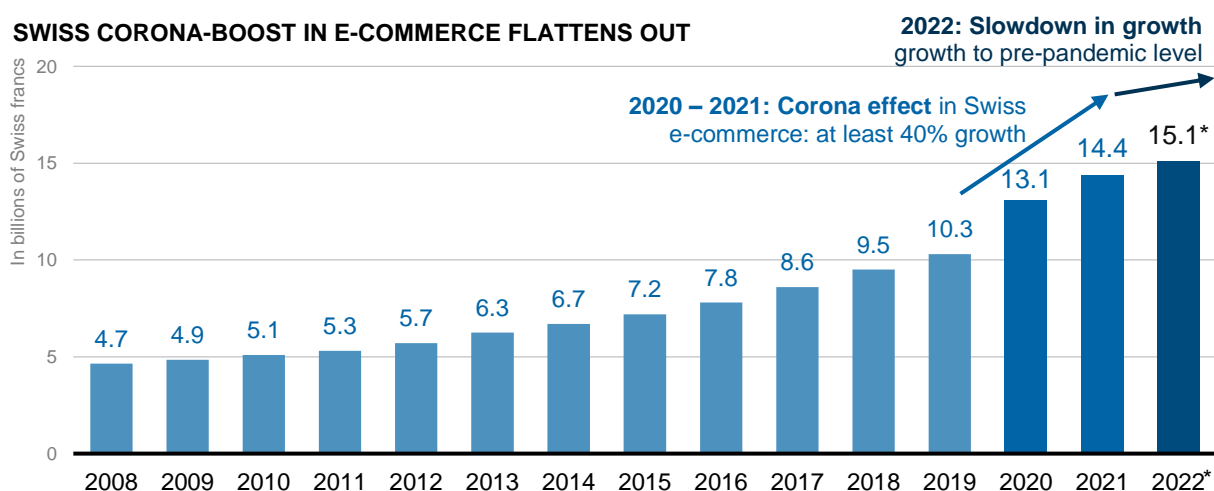
## 1.1 GROWTH IN E-COMMERCE

Digital commerce, also called electronic commerce or **e-commerce** for short, underwent a real **boom** at the beginning of the corona crisis due to the lockdowns, the Federal Council's stay-at-home order, and changes in shopping, work, and leisure behavior. Consumer purchases shifted heavily from offline to online. Online shopping had been gaining popularity in recent years and the corona pandemic acted as an accelerator (Gizycki & Pöhlmann, 2021, p. 48, Zumstein et al., 2021). Many online shops experienced strong sales growth within a very short time during the pandemic. In addition, numerous new e-commerce shops went online in a short time. Nonetheless, the high demand in 2020 and 2021 led to capacity bottlenecks and order processing and delivery difficulties for many online retailers.

According to a survey conducted by HANDELSVERBAND.swiss in cooperation with Swiss Post and GfK, the turnover of Swiss online shops grew by 10% to over 14.4 billion Swiss francs in 2021 (cf. Figure 1 and HANDELSVERBAND.swiss, 2022). This is 40% more than in 2019, and can rightly be called a "pandemic effect" or **Corona-driven boost in e-commerce**. In fact, online sales last year were probably even higher, as a large number of new online shops went live during the corona crisis and neither these nor the many small online shops are taken into account in these statistics.

According to HANDELSVERBAND.swiss, Swiss **e-commerce shrank** for the first time in the first half of 2022, by 6% compared to the previous year. Estimates by the Institute of Marketing Management (IMM) at the Zurich University of Applied Sciences (ZHAW) assume that Swiss online trade will grow by around 5% to 6% to 15.1 billion Swiss francs in 2022 (see right in Figure 1). This means that growth will slow down compared to the record years 2020 and 2021 and reach its pre-pandemic level.

Figure 1: E-commerce growth in Switzerland from 2008 to 2022



Source: HANDELSVERBAND.swiss (2022), \* Estimate by the authors of this study

## 1.2 SAMPLE

Reasons for conducting this study for a fifth time include the continuous growth in e-commerce in recent years and the online boom during the coronavirus crisis (Zumstein & Steigerwald 2018, 2019; Zumstein & Oswald 2020; Zumstein et al. 2021). Our aim was to find out more about the current developments in online commerce in Switzerland and Austria. The E-Commerce Lab at the Institute of Marketing Management (IMM) of the Zurich University of Applied Sciences (ZHAW) and the Management Center Innsbruck (MCI) jointly investigated the question of how e-commerce has developed in 2022.

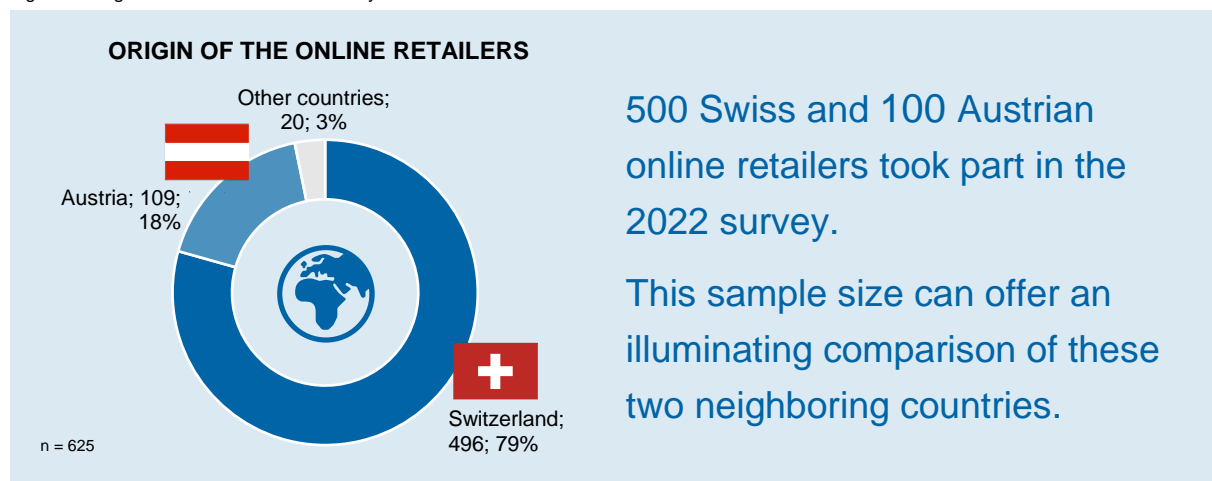
From the perspective of management research, the subjects of this research project were **all online retailers** in Switzerland and Austria with a .com, .ch or .at domain that are registered and operating in Switzerland or Austria. As with the previous projects, the focus is not exclusively on large online shops but also includes smaller and medium-sized online enterprises (SMEs). The data for the study was collected from 16 May to 15 August 2022 as part of an **online survey** using Qualtrics software. Of more than 4,000 online retailers contacted, **625 participants** completed most of the questionnaire. The **sample size** (n) is 625 unless otherwise stated.

The survey was able to reach the target group via LinkedIn, newsletters, e-mails, specialist groups in social media and via the contact forms of the online shops. The research and educational partners mentioned in the appendix, such as payrex, the HANDELSVERBAND.swiss, and the Austrian Trade Association, actively supported the authors in promotion.

## 1.3 STUDY PARTICIPANTS

A total of **496 Swiss** (79%) and **109 Austrian online shop operators** (18%) took part in the Online Retailer Survey 2022. Three percent of respondents indicated another country as their country of origin (see Figure 2). The study is representative for both Switzerland and Austria.

Figure 2: Origin of the online retailers surveyed



## 1.4 BUSINESS RELATIONSHIPS AND SALES MODELS

Over 88% of the participants operate an online shop in the **B2C** segment (business-to-consumer). This is the same proportion as in 2020 and 2021. At 43 %, almost half of the respondents sell in the **B2B** (business-to-business) segment. Around a third of online retailers sell both B2C and B2B. Of the participants in 2022, 13% operate a **manufacturer shop** (D2C; direct-to-consumer), 5% operate in the **B2G** (business-to-government) sector and 1% are in the **C2C** (consumer-to-consumer) sector. These results are shown in Figure 3. The online retailers were asked about their sales model or **type of operation** according to Heinemann (2022, p. 170 et seq.). The results are presented in Figure 4.

Figure 3: What kind of business relationships does your online shop support? (multiple answers possible)

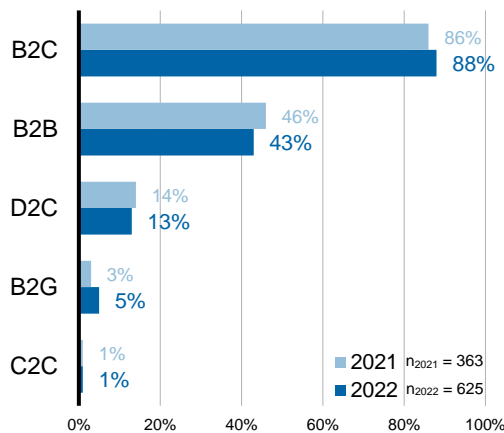
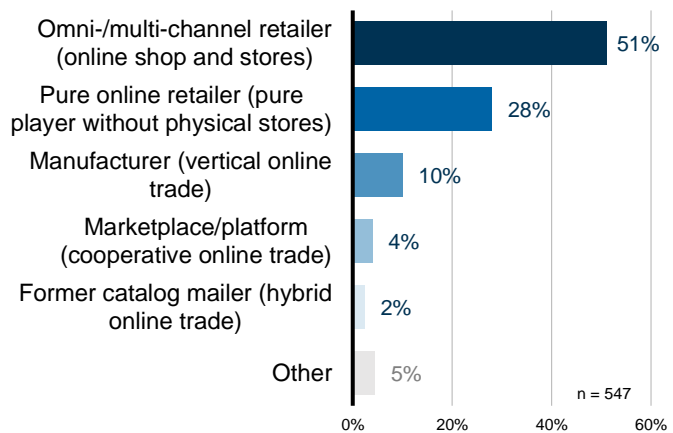
**BUSINESS RELATIONS 2021 & 2022**

Figure 4: To which type of business (sales model) can your online shop be assigned to most closely?

**TYPES OF BUSINESS 2022**

Omnichannel and pure player business models continue to dominate the e-commerce markets.



Figure 4 shows that more than **half** of the companies are active in multichannel or **omnichannel retailing**. This means that almost half sell simultaneously via several multiple channels such as online and retail stores, or via other sales channels (for details see chapter 2.1). Mediamarkt, Manor, Globus, Landi, Jumbo, Ochsner Sport, Intersport, Transa, Schuler Weine, Migros (e.g., m-electronics, Micasa, Office World, ExLibris), and Coop (e.g., Fust, Interdiscount, LIVIQUE, CHRIST) are typical Swiss omnichannel retailers. Hofer, Mömax, and Intersport are other omnichannel retailers in Austria.

More than a quarter of the respondents classify themselves as **pure players**, which do not have physical stores and which, in accordance with Heinemann (2022, p. 171), generate more than 70% of their sales online. Zalando, Brack, Microspot, Nettoshop, Saemereien.ch, Blacksocks, QoQa.ch, and Mahler & Co. are well-known pure players in Switzerland. In Austria, SportOkay.com, Merken.at, and eWein.com are examples of retailers doing business exclusively online.

Figures 3 and 4 show that one out of ten of the participants in the study is a **manufacturer** of products or a provider of services who sells directly to customers in vertical online trade. These include manufacturers such as Brita, Stöckli Ski, and Stadler Form in B2C, or Nussbaum, Meier Tobler, Kärcher, and SFS in B2B. There are also mixed forms here that operate both D2C (own brands) and B2C (products from other manufacturers) at the same time. Swiss examples of this are the bicycle dealers m-way and ROSE Bikes. Gebana (direct import of sustainable food) and Hongler (candles of its own manufacture as well as those of third-party production) are also examples of such hybrid forms of operation.

Around 4% of the respondents in Figure 4 describe themselves as a **digital marketplace or platform**. This “cooperative online trade” is characterized by multiple providers or suppliers and multiple customers. In Switzerland, Galaxus, Amazon, eBay, Microspot, Ricardo, and Tutti are classic digital marketplaces or platforms. Austria’s examples include shöpping.at, willhaben.at, otto.at, myproduct.at and anna-kauff.at (see chapter 2.2 on digital marketplaces).

Former **catalogue mail order companies**, here referred to as hybrid online retailers, are only rarely found today (2% of respondents). Otto, Ackermann, Lehner Versand, Angela Bruder, and Udo BÄR are practical examples of former catalogue mail order companies that are now heavily involved in online retailing.

## 1.5 SALES, EMPLOYEES AND PRODUCT GROUPS

Over one-third of the retailers surveyed operate a **very small online shop** with less than 100,000 Swiss francs or euros in turnover in 2021 (see Figure 5). A further third reported sales of between 100,000 and 500,000 Swiss francs or euros, and are thus still rather small online shops. The next category, turnover of between half a million and a million Swiss francs or euros, was reported by 14% of respondents; this places them in the lower midfield. Turnover of between one and five million Swiss francs or euros in 2021 was reported by 26% of the online shops surveyed, and 6% had sales of between five and ten million Swiss francs or euros. These online shops can be described as **medium-sized** in terms of revenue.

The **rather large** category (8%) is made up of online shops with a turnover of between ten and 25 million Swiss francs/euros. Finally, a total of 12% of the online shops surveyed generate more than 25 million Swiss francs or euros in sales; these were the largest 70 online shops. Of these, 7% have a turnover of more than 50 million Swiss francs/euros, putting them in the top 45 B2C and B2B online shops with the highest turnover, according to the poster "Digital Commerce Switzerland 2022" by Carpathia (2022).

Figure 5: How big was the turnover of your online shop in 2021?

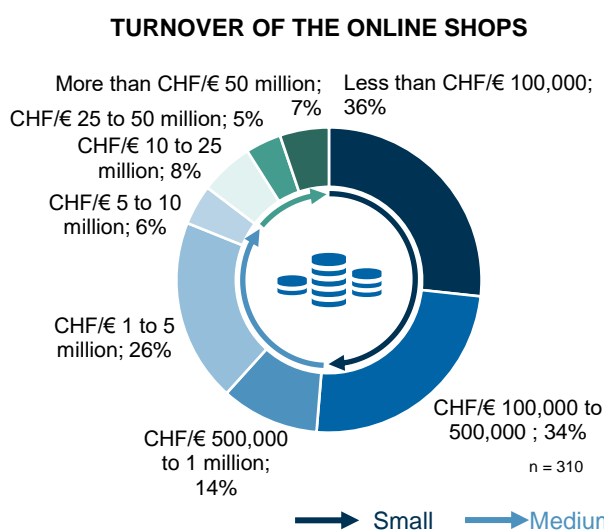


Figure 6: How many employees (in FTE) work for your online shop (including marketing, logistics, IT)?

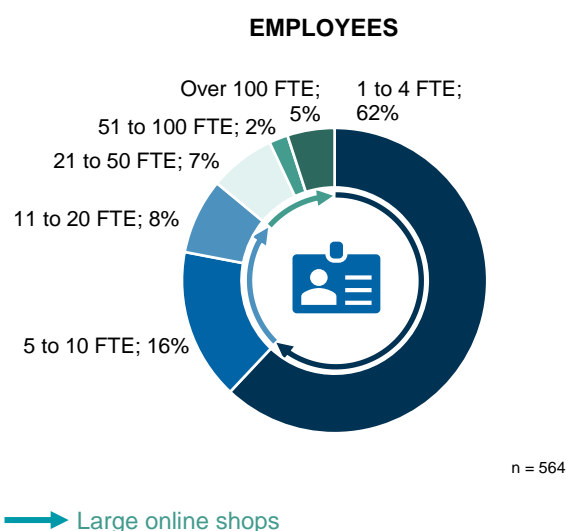


Figure 6 shows that 62% of the online shops surveyed have only **one to four employees** (including marketing, logistics and IT). Most teams responsible for a small online shop therefore have few human resources. Just over one out of four respondents are medium-sized shops with five to 20 employees. The moderately large and large online shops, which employ 21 to 50 employees, make up 7% of the sample (see Figure 6).

Two percent of the large online shop operators surveyed have 51 to 100 employees and another 5%, including the digital marketplaces, platforms, and online supermarkets are also very large in terms of staff, with over 100 employees.

More than half of the online shops are small, with fewer than four employees and a turnover of one million Swiss francs/euros. One out of six are medium-sized and large shops with more than 21 employees and a turnover of 10 million francs/euros.



See Figure 7 for an analysis of the product groups (or the product ranges) that the online retailers sell. The most strongly represented in this sample are **clothing** (20%) and **food** (18%). Other strongly represented offerings among the respondents are **sporting goods** (16%) and **toys** (14%)

**Multimedia and electrical appliances** and **cosmetics** were mentioned by the respondents equally at 12% each, followed by **furniture** at 10%. The two categories **computers and accessories** and **books, music and films** accounted for 9% each of online shop product groups reported by the respondents.

Retailers who sell **tickets** – for example, for events – or mobility and **travel** were only marginally represented in the sample (at 3% and 2%, respectively). For the numerous product groups covered under "Other", see Table 1. With 19 entries each, "decoration and accessories" and "tools and equipment" (both in B2B and B2C) were named most frequently, followed by products in "health, drugstore, and care" in third place.

**Home and Living** products are increasingly being sold online; "Household and Home Textiles", "Garden" and "Do it Yourself" were each mentioned a dozen times. In **B2B**, products for construction, machinery, equipment, and instruments are also frequently sold online and were mentioned 11 times. The product group "pet supplies" and stimulants such as "wine, spirits and tobacco" were entered in the survey with equal frequency. Behind "jewelry and watches" in Table 1 are numerous other product categories, such as "Gifts / souvenirs" (including stationery; seven mentions), "Office supplies / equipment" (six mentions), "Bicycles / e-bikes" (three mentions), and "Contact lenses / glasses" (two mentions).

Figure 7: Which product groups does your online store offer?  
(Multiple answers possible)

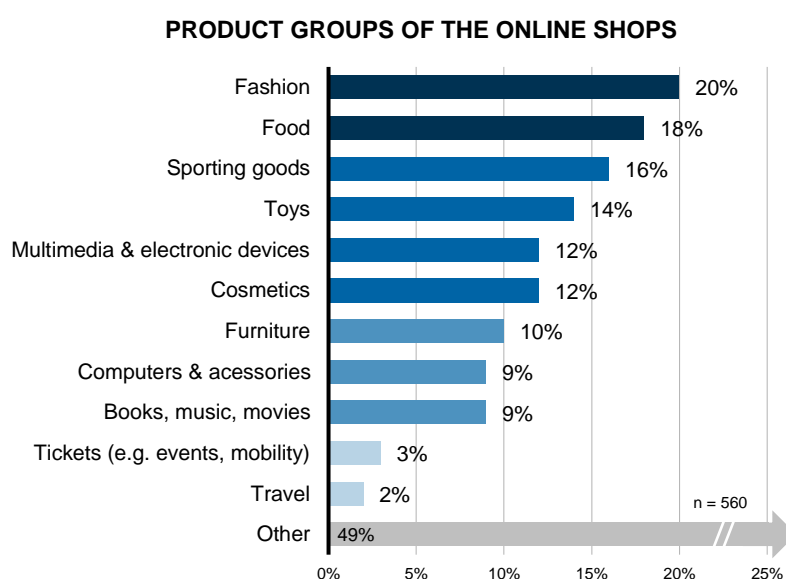


Table 1: Further product groups under "other"

| #  | Other product groups             | Number |
|----|----------------------------------|--------|
| 1  | Decoration and accessories       | 19     |
| 2  | Tools and equipment              | 19     |
| 3  | Health, drugstore and care       | 16     |
| 4  | Home and home textiles           | 14     |
| 5  | Garden                           | 14     |
| 6  | Do it yourself                   | 13     |
| 7  | Machines and instruments         | 11     |
| 8  | Pet                              | 11     |
| 9  | Wine, spirits and tobacco        | 11     |
| 10 | Jewelry and watches              | 10     |
| 11 | Craft / hobby                    | 8      |
| 12 | Vehicle accessories              | 8      |
| 13 | Gifts / souvenirs                | 7      |
| 14 | Art / pictures / artist supplies | 7      |
| 15 | Photo / print                    | 7      |
| 16 | Office supplies / equipment      | 6      |
| 17 | Operating facilities / equipment | 5      |
| 18 | Camping / outdoor                | 5      |
| 19 | Chemical / industrial products   | 4      |
| 20 | Services                         | 4      |
| 21 | Bicycles / e-bikes               | 3      |
| 22 | Sanitary / electrical / Heating  | 3      |
| 23 | Lighting                         | 2      |
| 24 | Erotic articles                  | 2      |
| 25 | Children's supplies              | 2      |
| 26 | Contact lenses / glasses         | 2      |
| 27 | Cleaning                         | 2      |

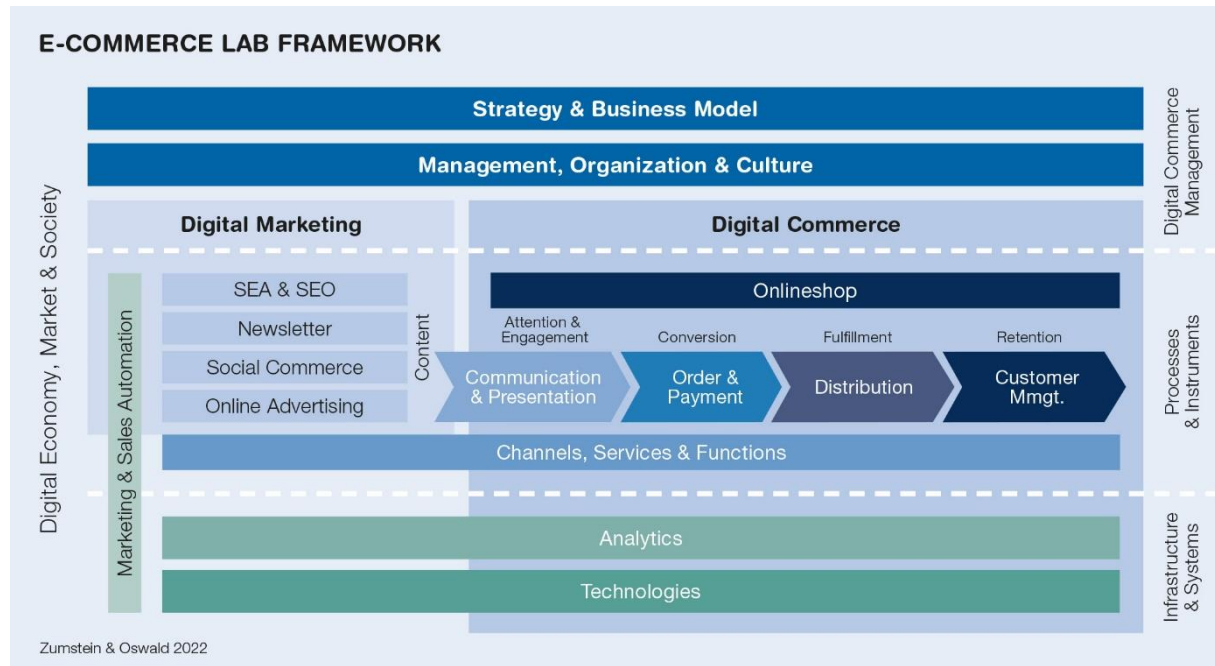
## 1.6 E-COMMERCE LAB FRAMEWORK

The market growth of all product groups in e-commerce in recent years is part of the **E-Commerce Lab Framework** of the ZHAW E-Commerce Lab (light blue area in Figure 8). Every online retailer should take these developments in the market and in the digital economy and society into account.

The E-Commerce Lab Framework is a model for analysis, structuring, and procedure that divides all relevant elements and aspects of digital commerce into the three dimensions of "**Digital Commerce Management**", "**Processes & Instruments**", and "**Infrastructure & Systems**". A further differentiation is made vertically between the two pillars, "Digital Marketing" and "Digital Commerce". The E-Commerce Lab Framework is used for the structured analysis of complex issues in dynamic online commerce and is a central working tool for the E-Commerce Lab's activities in teaching, research, further education, and consulting (Zumstein & Oswald 2022).



Figure 8: Classification of the Online Retailer Survey in the ZHAW E-Commerce Lab Framework



The chapters that follow discuss current research findings on the various elements of the E-Commerce Lab Framework: Firstly, **Chapter 2** discusses the developments of all relevant sales channels (Chapter 2.1), digital marketplaces (Chapter 2.2), assortment and price differences (Chapter 2.3), and strategic success factors in e-commerce (Chapter 2.4) along the digital value chain.

**Chapter 3** deals with relevant key figures in e-commerce. These include the number of articles in the online and total product ranges (Chapter 3.1), the return rate (Chapter 3.2), the basket value (Chapter 3.3), and the conversion rate (Chapter 3.4).

**Chapter 4** discusses different challenges in e-commerce. These are compared over the years in the “e-commerce worry barometer” (Chapter 4.1). Additionally, the current procurement and delivery difficulties are examined in greater depth (Chapter 4.2).

**Chapter 5** presents the latest results on the use of marketing instruments (Chapter 5.1), social media advertising (Chapter 5.2), influencer marketing (Chapter 5.3), and A/B or multivariate testing (Chapter 5.4).

**Chapter 6** goes into more depth on the online shop systems (Chapter 6.1), the peripheral systems integrated into the online shop (Chapter 6.2), and the services and functions of online shops (Chapter 6.3) and omni-channel retailers (Chapter 6.4).

**Chapter 7** is dedicated to e-payment, with a focus on the means of payment (Chapter 7.1), the revenue growth of payment methods (Chapter 7.2), payment service providers and billing partners (Chapter 7.3), and purchase on account and collection (Chapter 7.4).

Finally, **Chapter 8** presents conclusions (Chapter 8.1) and makes concrete recommendations for action for online retailers (Chapter 8.2). A checklist (Chapter 8.3) shows how retailers can optimally set up their online business.

## 2. Sales Channels & Success Factors

This chapter looks at the relevance of the different sales channels, focusing on digital sales channels. These include the company's own online shop, native apps with a sales function, digital marketplaces, and, increasingly in social commerce, social selling. Afterwards, the authors discuss various success factors and unique selling propositions (USP) in online commerce. The quality of products and services is by far the most frequently mentioned success factor. Some online retailers also try to differentiate themselves in the competitive and dynamic market with a strong brand, an exclusive offer, and a broad and/or deep product range.

### 2.1 SALES CHANNELS

An important recurring question in the study was how the online retailers are positioned in terms of distribution, i.e., through which possible **sales or distribution channels** they sell their products and services. Figure 9 clearly shows that the majority are broadly positioned in sales, and customers can order through several channels. The online retailers normally operate their **online shop** independently and consider it relevant to sales in 86 % of cases.

Two-thirds of the online retailers sell via **physical stores** in addition to the online shop. If the sales relevance are analyzed in Figure 9, physical stores are in second place, which 55% of respondents rate as at least somewhat relevant to sales. In 2022, omnichannel sales remain an important topic for many retailers, although sales in physical stores in 2020 and 2021 remained significantly below those of 2019 in many sectors due to the coronavirus crisis.

Similarly, two-thirds sell **personally on-site** through sales representatives or sales staff, especially in B2B, as Table 2 shows. This sales channel is also at least somewhat relevant to turnover for half of respondents (see Figure 9). This distribution channel was also strongly affected by the coronavirus crisis. Compared to digital sales channels, this type of sales has lost importance since spring 2020, especially in B2B, and personal sales temporarily switched to **digital communication tools**. Many sales meetings were – and still are – conducted by video conferencing, for example via Microsoft Teams, Zoom, Webex, Skype or other form of video conferencing.

Four out of five online retailers accept **orders via e-mail**, clearly at a higher frequency in B2B than in B2C. However, this channel is only “relevant” to sales for 21% and “quite relevant” to sales for a further 27%.

In fourth place among the sales channels most relevant to turnover is the **telephone**: at three out of four of the online shops surveyed, orders can be placed by telephone, for example, through customer service or call centers. For at least 41%, the telephone or smartphone is relevant to sales. In B2B, salespeople pick up the phone significantly more often than in B2C, with 52% mentioning it (in Table 2).

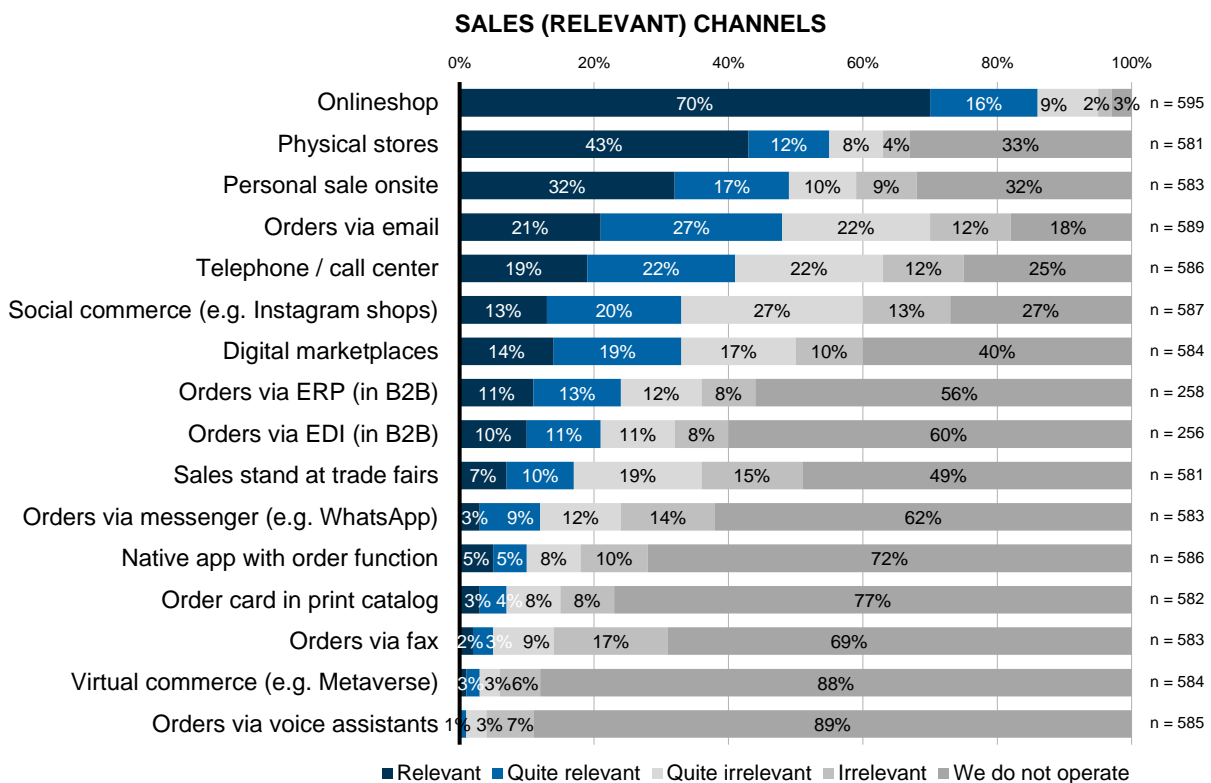
Almost three out of four Swiss and Austrian online retailers already sell in **social commerce** via social networks, above all Facebook Marketplace, Facebook Shops, or Instagram Shops. This is over 50% more than last year (Zumstein et al. 2021). Since the introduction of Facebook Shops and Instagram Shops in 2020, the majority of retailers have jumped on this bandwagon. The large reach of the social platforms makes social commerce an attractive, additional form of marketing and sales and is relevant to sales for one in three online retailers (see Figure 9). **Livestream shopping**, a trend from China that falls under social commerce, also holds great potential. However, in Switzerland livestream commerce is only used by a few online retailers such as Douglas, Christ, Betty Bossi, and Esprit (Zumstein & Keller 2022).

Social Commerce via Facebook Shops & Instagram Shops  
has become increasingly important in the last two years.





Figure 9: How relevant to sales are the following sales channels (ordering/distribution channels)?



Corporate e-shops, Facebook / Instagram Shops and digital marketplaces have become important digital sales channels.



More than half of the online retailers surveyed sell not only through their own online shop, but also through **digital marketplaces** such as Galaxus, Amazon, or eBay. In Switzerland, Ricardo and **classified formats** such as Tutti or Anibis are also strong in the market. For one out of three respondents, digital marketplaces are relevant to turnover (see Figure 9), which illustrates the high importance of these platforms. Chapter 2.2 provides detailed information about these marketplaces.

Almost half of the retailers surveyed are active in B2B; for one in four of them, **orders via ERP** (Enterprise Resource Planning) are relevant to turnover. One in five (21%) report **direct orders via EDI** (Electronic Data Interchange) being relevant to turnover.

Selling at **trade fairs** is still relatively common for half of the retailers, both B2B and B2C. Since this sales channel was temporarily closed during the coronavirus crisis, it lost significant relevance, and it is now only relevant to sales for 17% of respondents. Before the coronavirus crisis, significantly more retailers were still active at trade fairs in 2019 than today (Zumstein & Steigerwald 2019, p. 10).

However, online retailers are increasingly using **messenger services**, especially WhatsApp, as a sales channel. Orders via **WhatsApp** are already relevant to sales for one in eight retailers, many of these being smaller ones. Since there are still no data interfaces for messenger services, orders via WhatsApp are always associated with manual order processing (such as entries in the ERP) and additional administrative work.

Three out of ten, mostly larger online retailers, offer a **native app with an order function** in the Google and Apple app stores. For one in ten, the app is already relevant to sales, and the trend is rising for large online shops, as Table 2 shows. Many operators of small and medium-sized online shops do not want to invest in the development and operation of an app and use a mobile-optimized website with a responsive design.

**B2B retailers mostly sell in person on site, via e-mail and telephone, as well as direct technical interfaces.**



Nearly one in four retailers still send out **order cards in a print catalogue**. Nevertheless, this order form remains relevant to sales for only 7%, slightly less than before the pandemic. Three out of ten online retailers take orders via **fax machines**; however, this outdated sales channel is sales-relevant for only 3% of the participants. The fax is slowly but surely disappearing from retailers' offices.

Newly on the radar of some online retailers is the topic of **virtual commerce and the Metaverse**. However, only 3% said that this is currently relevant to sales. The Metaverse does not seem to mean more than gimmickry and trial-and-error for retailers (at least, so far), and this will probably remain the case in the next few years. Orders via **voice assistants** such as Amazon's Alexa or Google Assistant are also very rare and are not yet relevant to sales for online retailers (see Figure 9). There is still no discernable growth of voice commerce in retail practice.

Segmenting the relevant sales channels ("rather relevant" and "relevant" in Figure 9) by B2B and B2C, it is noticeable in Table 2 that **B2B sells** significantly more frequently via personal sales on-site (56 % mentions), via e-mail (64%) and via telephone (52%) than B2C. Typically, B2B retailers are less likely to have brick-and-mortar shops than B2C retailers. Otherwise, there are no major differences in B2B and B2C.

If the relevant sales channels of **small online shops** with fewer than four employees are analyzed, Table 2 shows that they sell less in omnichannel sales via retail shops, direct connections (ERP or EDI) and native apps than the large ones with more than 21 employees. On the other hand, e-mail (49%), trade fairs (20%) and messaging apps (WhatsApp; 15%) are clearly more relevant for small online shops.

Table 2: Sales channel by business relationship, online shop size and success

| Sales channel                   | Total<br>(Fig. 9) | Type of business |                  | Online shop size           |                            | Online shop success     |                          |
|---------------------------------|-------------------|------------------|------------------|----------------------------|----------------------------|-------------------------|--------------------------|
|                                 |                   | B2B<br>(n = 272) | B2C<br>(n = 553) | Small (<4 MA)<br>(n = 348) | Large (>21 MA)<br>(n = 77) | Successful<br>(n = 326) | Unsuccessful<br>(n = 49) |
| Online shop                     | 86%               | 88%              | 86%              | 83%                        | 95%                        | 97%                     | 45%                      |
| Physical stores                 | 55%               | 31%              | 56%              | 49%                        | 65%                        | 54%                     | 53%                      |
| Personal sales on-site          | 49%               | 56%              | 48%              | 49%                        | 42%                        | 38%                     | 54%                      |
| Orders via e-mail               | 48%               | 64%              | 46%              | 49%                        | 38%                        | 47%                     | 47%                      |
| Telephone / call center         | 41%               | 52%              | 43%              | 37%                        | 44%                        | 44%                     | 37%                      |
| Social commerce                 | 33%               | 32%              | 35%              | 35%                        | 37%                        | 32%                     | 4%                       |
| Digital marketplaces            | 33%               | 33%              | 33%              | 30%                        | 36%                        | 32%                     | 27%                      |
| Orders via ERP                  | 24%               | 24%              | 18%              | 16%                        | 36%                        | 22%                     | 20%                      |
| Orders via EDI                  | 21%               | 21%              | 11%              | 12%                        | 36%                        | 22%                     | 0%                       |
| Sales stand at trade fairs      | 17%               | 18%              | 17%              | 20%                        | 11%                        | 14%                     | 18%                      |
| Orders via messenger (WhatsApp) | 12%               | 13%              | 11%              | 15%                        | 7%                         | 13%                     | 16%                      |
| Native app with order function  | 10%               | 8%               | 10%              | 5%                         | 25%                        | 10%                     | 4%                       |
| Order card in print catalogue   | 7%                | 5%               | 7%               | 5%                         | 13%                        | 7%                      | 4%                       |
| Orders via fax                  | 5%                | 5%               | 4%               | 4%                         | 4%                         | 5%                      | 4%                       |
| Virtual commerce (Metaverse)    | 3%                | 3%               | 4%               | 4%                         | 3%                         | 4%                      | 4%                       |

**Large and successful retailers are using more and different sales channels than small or unsuccessful ones.**



The two columns on the far right of Table 2 show the analysis of which sales channels are used by **successful online retailers**. As a basis for the data, the authors selected those online shops which, according to their own statements, are “very successful” or “rather successful” (see Figure 13 in Chapter 2.4). Compared to the unsuccessful, the successful ones focus much more on the online channel – mentioned by 97% of successful retailers. In a relative comparison, the unsuccessful sell even more frequently via personal sales, but less via digital marketplaces and social media via Facebook Marketplace, Facebook Shops and Instagram Shops. In general, successful online retailers use different sales channels more often, i.e., they are more broadly positioned and active in sales than the unsuccessful ones.

## 2.2 DIGITAL MARKETPLACES

When online retailers were asked whether their companies are present on digital marketplaces or other digital platforms, a surprising picture emerged: 60% already are. That is 20% more than last year (Zumstein et al. 2021) and two-thirds more than three years ago (Zumstein & Steigerwald 2019).

**Digitec Galaxus** is by far the number one among Swiss retailers, with nearly 31% mentioning this (see Figure 10), ahead of the C2C platform **ricardo.ch** (20%) and **Amazon** (19%).

The Swiss classified formats **ricardo.ch** and **tutti.ch** have been able to strongly increase their sales and market shares since the coronavirus crisis, not only due to the pandemic but also due to their strong brand, low fees, and high user-friendliness. The Coop subsidiary **Microspot** was able to maintain sales and market share: In 2022, 9% of online retailers are selling through this digital marketplace, up from 5% in 2019. The international auction platform **eBay** did not make it past a share of 7% among the surveyed retailers, as it is mainly used for sales by private individuals. At 5%, **shöpping.at**, the new Austrian marketplace, was named most frequently by the Austrian retailers. Another Austrian marketplace, **willhaben.at**, was mentioned by nearly 5%.

Figure 10: On which digital marketplaces do you sell (your) products?

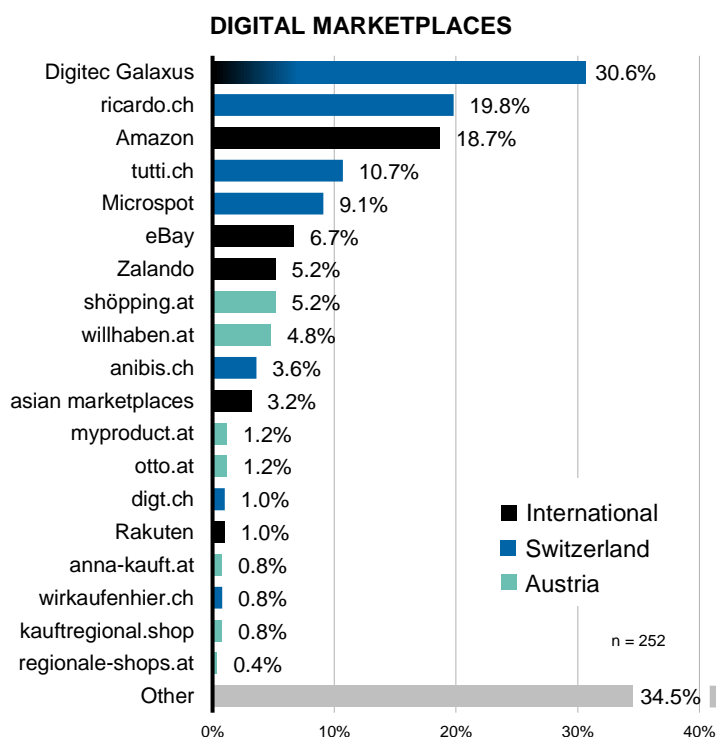


Table 3: Further digital marketplaces/platforms mentioned

| #  | Other marketplaces | Number |
|----|--------------------|--------|
| 1  | Brack.ch           | 12     |
| 2  | Boutiquery.ch      | 2      |
| 3  | Etsy               | 2      |
| 4  | Mercateo           | 2      |
| 5  | Google Shopping    | 2      |
| 6  | Cheapskate         | 2      |
| 7  | Farmy.ch           | 2      |
| 8  | Vivino             | 2      |
| 9  | AboutYou           | 1      |
| 10 | Blokker            | 1      |
| 11 | Concerto           | 1      |
| 12 | Fotoblitz.ch       | 1      |
| 13 | Freudenreich.world | 1      |
| 14 | Grootic            | 1      |
| 15 | Homly.ch           | 1      |
| 16 | Integral           | 1      |
| 17 | Intersport         | 1      |
| 18 | La Redoute         | 1      |
| 19 | Mercanto           | 1      |
| 20 | Nahmoo             | 1      |
| 21 | Notino             | 1      |
| 22 | Sportscheck        | 1      |
| 23 | Toppreise.ch       | 1      |
| 24 | Wer liefert was    | 1      |
| 25 | Zur Rose           | 1      |

The diversity and economic relevance of digital marketplaces has again increased significantly since the pandemic.



Europe's leading fashion online retailer **Zalando** was able to maintain its market share as a fashion platform, being mentioned by 5% of respondents. However, it did not succeed in growing with the market. With **“Connected Retail”**, Zalando offers small, stationary fashion retailers a cost-effective way to make their products internationally visible and at the same time to sell regionally. Online platforms like this are helping to cushion the declining sales in physical stores and shopping malls. Swiss platform **anibis.ch** is used by 4% of Swiss retailers, which is slightly less than in 2019 and 2021 (5%). Surprisingly few sell via **Asian marketplaces** such as Alibaba, AliExpress, Tmall, or jd.com: only 3% of the online retailers surveyed. Looking more closely at the Austrian market, it is noticeable that it is less concentrated than other marketplaces. In addition to **shopping.at** and **willhaben.at**, Austrian online retailers also sell via **myproduct.at**, **otto.at**, **anna-kauff.at**, and the regional marketplaces **kaufregional.shops** and **regionale-shops.at** (with 1-2% of mentions; see Figure 10).

Many other digital marketplaces and platforms were mentioned under “Other”: Brack.ch (12 mentions in Table 3), Boutiquery.ch, Etsy, Mercateo, Google Shopping, Geizhals, Farmy.ch, and Vivino (with two mentions each). A wide assortment of other platforms, two dozen in all, were each mentioned once (“everything from A to Z”, one might say: from “AboutYou” to “Zur Rose”).

## 2.3 PRODUCT RANGE AND PRICE DIFFERENCES

The 278 omnichannel retailers (51%) who operate both an online shop and a physical store were asked what differences in product range and price they make between online and physical. Figure 11 shows a clear picture of the responses: almost half of the omnichannel retailers offer **a wider product range online** than in brick-and-mortar stores. Thus, more product categories are often offered and sold online than in physical stores. In contrast to brick-and-mortar stores, the floor space and shelf space is not limited in the online shop. Close behind this, at 43%, a similar number offer **a wider product range online** than in brick-and-mortar stores. This means that more products of the same product category can be and are offered online than offline. This is particularly the case with digital marketplaces and specialized online shops (also known as expert or niche online shops).

Almost one in four online shops offer **a different product range online** than in the brick-and-mortar store, and thus try to distinguish themselves online from bricks-and-mortar shops and the competition by offering exclusive products. Only a small minority, 8%, offer **lower prices online** than in the physical store, in essence giving an online discount.

Figure 11: What product range and price differences do you make online and in physical stores? Multiple answers are possible.

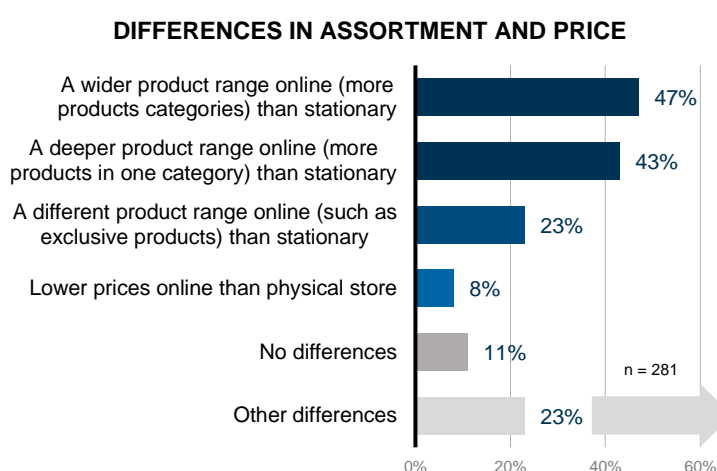


Table 4: Other differences mentioned

| # | Other differences  | Number |
|---|--|--------|
| 1 | A smaller product range (fewer products) online than in physical store | 14     |
| 2 | Online (partially/temporarily) higher prices than physical store       | 4      |
| 3 | A wider product range physical store than online                       | 3      |
| 4 | A narrower and more limited product range online than physical store   | 2      |
| 5 | Full range online - offline a showroom only                            | 2      |
| 6 | Selected products online only  | 1      |
| 7 | Stationary pick-up discount  | 1      |

Almost half of all omnichannel retailers offer a wider product range online than in the physical store.



One in ten respondents do not report **any product range differences or price differences** online and offline. One in four respondents stated other differences in price (see Table 4): 14 omnichannel retailers offer a **smaller product range online**, i.e., fewer products online than in the physical store.

Four retailers offer **higher prices** online, at least partially or temporarily, than in-store, and three others offer a **wider range of products** in-store than online. Two retailers opted for a narrower and more limited range online than in-store. Two others only sell products online, with the retail “store” serving only as a **showroom**. One retailer offers only selected products online and another offers a **pick-up discount**.

## 2.4 SUCCESS FACTORS IN E-COMMERCE

This study examined the various success factors of online retailers for the first time. The most important success factor is clearly the **quality of the products** and services offered (with 74% mentioning this; see Figure 12). A solid half of the online retailers see the **exclusivity of the products** and **of the brand** as a success factor. A high level of **customer orientation** (46%), high **product availability** (43%) and the **breadth of the product range** (43%) are also decisive success drivers for many retailers.

The **price** (38%) and the **depth of the product range** (37%) are less frequently cited as critical to success. The **user-friendliness**, or user experience (UX) of the web shop (34%) and **good online marketing** (29%) are mentioned as similarly critical to success. About one in four (23%) respondents see the **high-quality content** of the online shop and social media as a success factor.

This survey revealed that **sustainability** (28%) as well as the **regionality of products** and services (23%) are of little importance from the perspective of online retailers compared to other success factors. **Delivery and return conditions**, often discussed in recent years (with 19% mentioning this), the various **omnichannel services** (such as click and collect; 16%) as well as **same-day delivery** (11%) are less important drivers of success than commonly assumed.

**Data-based services** are almost never cited as a success factor, with 8% of mentions (bottom of Figure 12). Advice, fast delivery, curated offers, own advice, delivery, assembly, and other customer services were all mentioned by only one retailer (“Other success factors” in Table 5).

Figure 12: What are your most important success factors (USP; Unique Selling Proposition) in online retailing? (Multiple answers possible)



Table 5: Further individual mentions of success factors of online retailers (in number of mentions; n = 30)

| # | 1) Online shop & fulfilment |   | 2) Services & Marketing       |   | 3) Products, Branding & Pricing |   |
|---|-----------------------------|---|-------------------------------|---|---------------------------------|---|
| 1 | Fast delivery               | 3 | Personal / digital advising   | 8 | Own brands / products           | 2 |
| 2 | Product configurator        | 1 | Google Ranking (SEO)          | 2 | Personalized products           | 2 |
| 3 | Product information         | 1 | Customer service              | 2 | Personalized prices             | 2 |
| 4 | Shop Performance            | 1 | Quality of advice             | 1 | Branding                        | 1 |
| 5 | Availability of the goods   | 1 | Own delivery/assembly service | 1 | Curated offer                   | 1 |
| 6 | Reliability                 | 1 | No advertising                | 1 | Product overview                | 1 |

Three out of four online retailers consider the quality of their products and services to be the most important success factor.

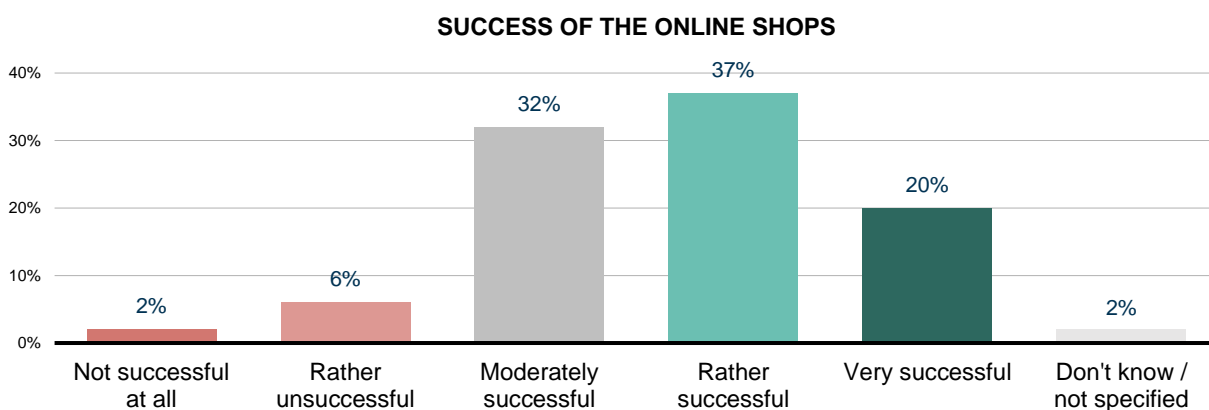


As part of the success factor analysis, the online retailers were asked how successful they consider their online shop to be. Two-thirds rate their own online shop as “rather successful” and one in five as “very successful” (see Figure 13). According to their own statements, more than **half of the online retailers are successful**. Another third considers themselves to be moderately successful. Consequently, it can be generally concluded that the retailers are very satisfied with the development of the online shops.

Only 8% rate their online shop as “rather unsuccessful” or “not successful at all”. This could also be seen as a tendency to overestimate oneself, since clearly, more than half of retailers cannot mathematically be “more successful than average”.

If the success factors of unsuccessful and **successful online shops** are segmented, the following picture emerges (see Table 6): The quality of products or services is mentioned much more frequently by the successful ones (78%) than by the unsuccessful ones (48%). Successful online shops are twice as **customer oriented** as the unsuccessful ones, with 54% mentioning this, i.e., that they are digitally or personally closer to the customer. Successful online shops also tend to have a **better-known and stronger brand** than the unsuccessful ones. While 54% of successful online shops offer exclusive products and services, only 33% of the unsuccessful ones do. Surprisingly, 51% of the successful online retailers see a **broad assortment** as a success factor much more often than the less successful ones (15%). The difference in assortment depth is less pronounced. Half of the successful online shops rated a **high level of product availability** as a success factor; for the unsuccessful it is not even one in four.

Figure 13: How successful do you consider your online shop to be?



More than half of the 568 online retailers surveyed rate their online shop as successful.



Table 6: Success factors of successful and unsuccessful online shops

| Success factor  | Successful online shops*<br>(n = 326) | Ø<br>(n = 181) | Unsuccessful online shops**<br>(n = 49) |
|---|---------------------------------------|----------------|---|
| Quality of the products and services                              | 78%                                   | 71%            | 48%                                     |
| High customer orientation (digital / personal customer proximity) | 54%                                   | 40%            | 23%                                     |
| Exclusivity of the products and services                          | 54%                                   | 51%            | 33%                                     |
| Brand (brand awareness and brand strength)                        | 53%                                   | 43%            | 44%                                     |
| High product availability   | 51%                                   | 40%            | 23%                                     |
| Breadth of the offerings or assortment                            | 51%                                   | 37%            | 15%                                     |
| Depth of the offerings or assortment (niche strategy)             | 44%                                   | 29%            | 27%                                     |
| Price   | 41%                                   | 35%            | 33%                                     |
| Usability (UX) of the online shop                                 | 39%                                   | 30%            | 19%                                     |
| Good online marketing (e.g., social media marketing)              | 34%                                   | 26%            | 15%                                     |
| Sustainability (products / company)                               | 29%                                   | 29%            | 19%                                     |
| Unique / high-quality content (content marketing)                 | 25%                                   | 19%            | 19%                                     |

\* "Rather successful" or "very successful" in Figure 13; \*\* "Not successful" or "rather not successful" in Figure 13

Successful online shops offer a wider range of high-quality products and are more customer-oriented and user-friendly than unsuccessful ones.



Table 6 also shows that one in three successful online shop operators cite **good online marketing**, for example in the form of social media marketing, as a success factor. For the unsuccessful, it is only 15%. With 39% mentioning this, successful online shop operators place a much stronger focus on a **user-friendly online shop** than the less successful ones (19%).

If one differentiates between the success factors in **B2B and B2C**, we see (Table 7) that there are largely no major differences. Both the quality of the products or services, the exclusivity of the products and the brand awareness were mentioned with similar frequency. Only customer orientation, product availability, and breadth of the offer were mentioned a few %age points more frequently in B2B than in B2C.

In the success factor analysis, a comparison between the **small and the large online shops** is interesting (see right of Table 7): The quality of the products and services (75%), and especially the exclusivity of the products or services, are more often critical to success for the small shops than for the large ones. In contrast, the operators of large online shops name the brand (62%), customer orientation (65%), product availability (53%), and the range of products (52%) as success factors more often than the small ones.

Surprisingly, the large online shop operators with many specialized employees attach much more importance to user-friendliness and to an excellent **user experience of the online shop** than the small ones (51% versus 29%). For almost half of the large online shops, good **digital marketing** is a success factor; among the small ones, only a quarter think so. Large companies have more resources in marketing (budget, staff, and know-how) and can therefore successfully lead more customers to their own online shops. Sustainability issues seem to be somewhat more success critical to large online shops (36%) than the small ones (28%).

In B2B e-commerce, a high level of customer orientation and product availability are more critical to success than in B2C.





Table 7: Success factors differentiated by business relationship and online shop size (percentage of respondents mentioning)

| Success factor                                       | Total<br>(Fig. 12) | Business relationship |                  | Online shop size           |                            |
|--|--------------------|-----------------------|------------------|----------------------------|----------------------------|
|  |                    | B2B<br>(n = 272)      | B2C<br>(n = 553) | Small (<4 MA)<br>(n = 348) | Large (>21 MA)<br>(n = 77) |
| Quality of the products and services                 | 74%                | 74%                   | 74%              | 75%                        | 69%                        |
| High customer orientation (customer proximity)       | 52%                | 50%                   | 53%              | 57%                        | 47%                        |
| Exclusivity of the products and services             | 48%                | 47%                   | 48%              | 43%                        | 62%                        |
| Brand (brand awareness and brand strength)           | 46%                | 51%                   | 46%              | 42%                        | 65%                        |
| High product availability                            | 44%                | 51%                   | 45%              | 40%                        | 52%                        |
| Width of the offer or assortment                     | 43%                | 47%                   | 42%              | 36%                        | 53%                        |
| Depth of the offer or assortment (niche strategy)    | 38%                | 40%                   | 39%              | 37%                        | 43%                        |
| Price  | 37%                | 42%                   | 38%              | 37%                        | 38%                        |
| Usability (UX) of the online shop                    | 34%                | 36%                   | 36%              | 29%                        | 51%                        |
| Good online marketing (e.g., social media marketing) | 29%                | 27%                   | 31%              | 23%                        | 47%                        |
| Sustainability (products / company)                  | 28%                | 25%                   | 30%              | 28%                        | 36%                        |
| Unique / high-quality content (content marketing)    | 23%                | 23%                   | 23%              | 25%                        | 17%                        |
| Quality of the products and services                 | 23%                | 21%                   | 22%              | 22%                        | 29%                        |

High product availability, a wide product range, user-friendliness and good online marketing are frequent USPs of large online shops. The smaller ones can differentiate themselves through high-quality and exclusive products.





### 3. Key Figures in E-Commerce

This chapter takes a closer look at some of the key figures or key performance indicators (KPIs) in e-commerce. These include the number of articles in the online shop, the return rate of articles delivered, the average shopping basket or order value, and the conversion rate of the online shop.

#### 3.1 NUMBER OF PRODUCT ITEMS

The number and proportion of product items (articles) offered in an online shop can be seen as an indicator of a retailer's level of development and professionalization. Almost three-quarters of the 561 online shops surveyed in Switzerland and Austria offer their customers up to **10,000 articles** (see Figure 14). It is striking that almost half of the online shops offer a range of up to **999 articles** and can thus be described as small or rather small.

One in five online shops sell even fewer than **99 items online**. One in five of the medium-sized retailers offers customers between **10,000 and 99,999 products** in their online shop. Only 7% of the respondents have **more than 100,000 items** in their online product ranges, making them classifiable as "large". Just 2% of the respondents, including the digital marketplaces, sell more than **one million items** online. With regard to the number of articles in the online shop, the authors observe that some retailers - especially in B2B - are still in the build-up and further development phase and are expanding their online product ranges on an ongoing basis.

Figure 15 shows that the number of items in the omnichannel retailers' **total assortment** is far greater than that of the online shop. Only a quarter of the retailers have a small total assortment of less than 999 items. Almost two-thirds have a medium-sized total assortment between 1,000 and 99,999 items, and 11% have over 100,000.

Figure 14: How many items (articles) does your online shop offer?

NUMBER OF ITEMS IN ONLINE ASSORTMENT

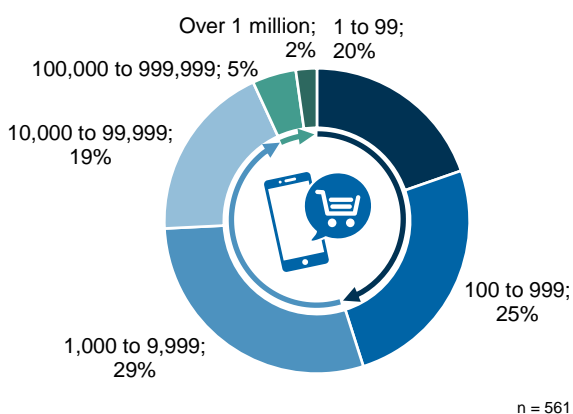
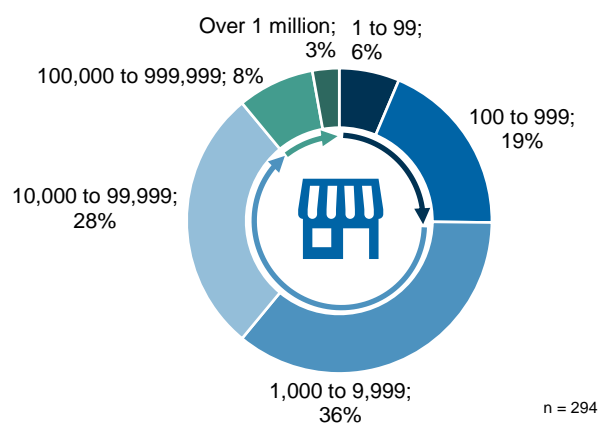


Figure 15: How many items (articles) are in your total assortment?

NUMBER OF ITEMS IN TOTAL ASSORTMENT



→ Small → Medium → Large online and full assortment (range)

Almost half of the online shops have a small range of up to 999 items or a medium-sized range up to 99,999 items.

Only a few retailers offer a huge online assortment of more than 100,000 items.



Table 8: Size of online product ranges by product group

| Product group                          | Small online range<br>1 to 999 items | Medium online range<br>1,000 to 99,999 items | Large online range<br>Over 100,000 items |
|--|--------------------------------------|--|--|
| Fashion (n = 97)                       | 38%                                  | 50%  | 7%                                       |
| Books, music & films (n = 40)          | 30%                                  | 36%  | 29%                                      |
| Computers & accessories (n = 41)       | 16%                                  | 56%  | 31%                                      |
| Cosmetics (n = 53)                     | 33%                                  | 50%  | 13%                                      |
| Food (n = 76)                          | 56%                                  | 36%  | 5%                                       |
| Furniture (n = 46)                     | 20%                                  | 58%  | 14%                                      |
| Multimedia/electronic devices (n = 46) | 25%                                  | 40%  | 26%                                      |
| Toys (n = 65)                          | 22%                                  | 46%  | 27%                                      |
| Sporting goods (n = 75)                | 24%                                  | 55%  | 16%                                      |

The online product range in fashion, furniture, and sporting goods is often small while that of computers and books is medium-sized, and computers and electrical appliances often large.



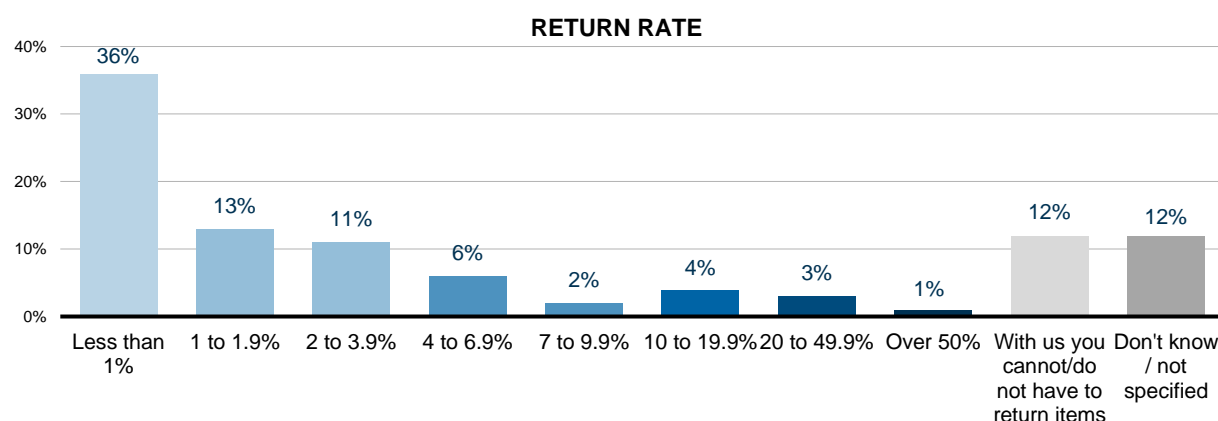
If the size of the **online assortments by product group** is analyzed (in Table 8), 38% of the small **fashion online retailers** carry a small product range, less than 999 items. Half of the online retailers offer 1,000 to 99,000 products in the clothing range. In the **books, music and films** category, the number of online shops with small, medium, and large online product ranges is fairly similar. In **computers and accessories**, most retailers have medium or large online product ranges (in 56% and 31% of cases respectively).

Many **cosmetics retailers** also have thousands or even tens of thousands of items in their online product ranges. **Online grocery sellers**, on the other hand, have a small online assortment in 56% of cases, while 36% have a medium-sized product range. Online supermarkets or grocery wholesalers with over 100,000 items are few and far between. Many **furniture and sporting goods retailers** carry between 1,000 and 100,000 items. Looking at the large online ranges of hundreds of thousands of products in the right-hand column of Table 8, these are predominantly in the **computers, multimedia, and electronics** sectors.

### 3.2 RETURN RATE

In recent years, returns of online orders have been the subject of controversial discussions on the part of associations, end consumers and retailers, primarily due to the sustainability debate. This is why in this study the authors asked retailers about the percentage of returns in terms of quantity (see Figure 16).

Figure 16: What is the percentage of returns in your online shop (in total)?



One-third of online shops have a very low return rate of less than 1%.



The analysis of the return rate in Figure 16 presents an interesting picture: 36% of the online retailers surveyed have a **very low return rate of less than one percent**. Fully half of the online retailers have a return rate that can be called low or rather low, of less than four percent. Reasons for this include the targeted product selection and efficient personalization services. Twelve percent of the retailers have a medium return rate, of between 4 and 19.9%, and only four percent have a high return rate of over 20%. In 12% of the online shops surveyed, the customer cannot return goods or has no obligation to return goods.

To analyze the return rate by product group (Table 9), the return rates were divided into three groups: low (one to 3.9%), medium (4% to 19.9%) and high (20% to >50%). The study shows that within the medium and high **return rates**, the product group of **clothing and sporting goods** are particularly affected. In the product group of cosmetics, food and toys, on the other hand, the return rates are in many cases low, at 1% to 3.9%.

Table 9: Return rate by product group

| Product group                          | Low returns rate<br>1% to 3.9% | Average return rate<br>4% to 19.9% | High rate of returns<br>20% to >50 |
|--|--------------------------------|------------------------------------|------------------------------------|
| Fashion (n = 97)                       | 44%                            | 34%                                | 22%                                |
| Books, music & films (n = 40)          | 88%                            | 10%                                | 3%                                 |
| Computers & accessories (n = 41)       | 78%                            | 20%                                | 2%                                 |
| Cosmetics (n = 53)                     | 85%                            | 15%                                | 0%                                 |
| Food (n = 76)                          | 87%                            | 11%                                | 3%                                 |
| Furniture (n = 46)                     | 80%                            | 15%                                | 4%                                 |
| Multimedia/electronic devices (n = 46) | 77%                            | 19%                                | 4%                                 |
| Toys (n = 65)                          | 85%                            | 14%                                | 2%                                 |
| Sporting goods (n = 75)                | 56%                            | 31%                                | 13%                                |

Cosmetics, food, and toys have a low return rate of less than 4%. However, clothes and sporting goods are known to be returned very frequently.

When analyzing the return rate according to the size of the online shop, Table 10 clearly shows that a high proportion of **small companies**, 87%, have a **return rate lower** than 4%. Three-quarters of small online shops with five to ten employees also have a low return rate. This may be because smaller companies do not include printed return labels or that returns are not offered free of charge.

For **medium-sized e-shops** with 11 to 20 employees and, in particular, the large ones with over 100 employees in the online shop, the proportion increases significantly, with a high return rate of 20% to over 50% (see Table 10).

A closer look at the business relationships shows there are generally fewer returns in **B2B** than in B2C and in D2C.

Table 10: Return rate by size of online shop (number of employees)

| Number of employees in online shop | Low return rate<br><1% to 3.9% | Average return rate<br>4% to 19.9% | High return rate<br>20% to >50 |
|------------------------------------|--------------------------------|------------------------------------|--------------------------------|
| 1 to 4 employees (n = 267)         | 87%                            | 10%                                | 2%                             |
| 5 to 10 employees (n = 67)         | 73%                            | 21%                                | 6%                             |
| 11 to 20 employees (n = 40)        | 68%                            | 20%                                | 13%                            |
| 21 to 50 employees (n = 37)        | 65%                            | 23%                                | 13%                            |
| 51 to 99 employees (n = 13)        | 58%                            | 33%                                | 8%                             |
| Over 100 employees (n = 26)        | 58%                            | 21%                                | 21%                            |

The larger the online shop, the higher the return rate.



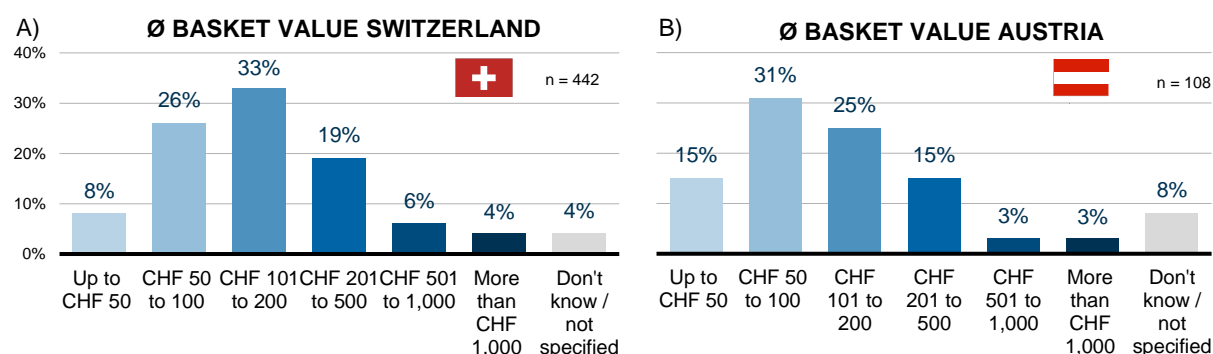
### 3.3 BASKET VALUE

The basket value (or order value) of an online order is an essential key performance indicator (KPI) and determined by the number of products and the sales price of the product(s). For one in three Swiss online retailers, the average basket value is **100 Swiss francs or less** (see Figure 17A). Another one-third of the respondents report an average order value between **101 and 200 Swiss francs**. One out of ten retailers achieve an average order value of over 500 Swiss francs.

Among the **Austrian online retailers**, the shopping basket values are usually somewhat lower than in Switzerland: 15% achieve an average shopping basket value of up to 50 euros (see Figure 17B). A good one-third achieves a basket value from 50 to 100 euros, and one-fourth between 101 and 200 euros. One-fifth of Austrian online retailers reported an order value of over 200 euros.

Among **omnichannel retailers**, over half have an average basket value between 201 to 500 francs or euros. Among the **pure online retailers**, average basket value is often between 50 and 200 francs, i.e., somewhat lower. For **marketplaces**, the average basket value is highest, with the majority being between 201 and 500 francs.

Figure 17: What is the average value of the shopping basket in the online shop?



One-third of all shopping baskets are worth between 101 and 200 Swiss francs. In Austria, one-third are between 50 and 100 euros.



A closer look at the basket values reveals a distinction between low (< 50 to 100 francs), medium (101 to 500 francs) and high basket values (501 to 1,000 francs) (see Table 11). The **low basket value** category of up to 100 Swiss francs often includes books, music and films, cosmetics, food, toys, and event tickets. In the **medium basket values** of 101 to 500 francs, clothing, travel, sporting goods and clothes are most frequently purchased, but these also include electrical appliances, furniture, and toys.

The **high basket values**, which on average contain from 501 to over 1,000 Swiss francs in goods, are mainly furniture, followed by computers and accessories, multimedia and electronic equipment and travel.

Table 11: Basket value by product group

| Product group                            | High basket value<br>501 to >1,000 CHF | Average basket value<br>101 to 500 CHF | Low basket value<br>< 50 to 100 CHF |
|--|--|--|-------------------------------------|
| Fashion (n = 81)                         | 1%                                     | 72%                                    | 27%                                 |
| Books, music & films (n = 31)            | 0%                                     | 45%                                    | 55%                                 |
| Computers & accessories (n = 39)         | 13%                                    | 56%                                    | 31%                                 |
| Cosmetics (n = 46)                       | 7%                                     | 37%                                    | 57%                                 |
| Food (n = 76)                            | 3%                                     | 49%                                    | 49%                                 |
| Furniture (n = 43)                       | 23%                                    | 60%                                    | 16%                                 |
| Multimedia/electronic devices (n = 47)   | 13%                                    | 64%                                    | 23%                                 |
| Travel (n = 8)                           | 13%                                    | 88%                                    | 0%                                  |
| Toys (n = 51)                            | 0%                                     | 53%                                    | 47%                                 |
| Sporting goods (n = 62)                  | 3%                                     | 76%                                    | 21%                                 |
| Tickets (e.g., events, mobility; n = 15) | 0%                                     | 53%                                    | 47%                                 |

Travel, fashion, and sporting goods often have a medium basket value of 101 to 500 francs. Computers, furniture, and electronics often have a high basket value over 500 francs.



### 3.4 CONVERSION RATE

The conversion rate is one of the most important KPIs in e-commerce and is calculated by dividing the number of purchases by the number of visits to an online shop. The conversion rate depends on the industry, the online shops' products, and many other factors. It is an indicator for a good omnichannel concept and, on the other hand, for assessing the efficiency of the used marketing instruments.

Only 9% of retailers have a **very low conversion rate** (below 1% for the year 2022, see the blue values on the right of each pair of bars in Figure 18). Thirty-nine percent report a **rather low conversion rate** (between 1% and 2.9%). This means that half of all online retailers have a conversion rate below 2.9%, and clearly shows that many online shops are still in the development phase and that the online marketing measures and the online shop can be further improved in terms of **conversion rate optimization** (CRO).

One-third of the online retailers report a **medium conversion rate** (between 3% and 7.9%). Twelve percent of the online retailers surveyed had a **high conversion rate (over 8%)**. Conversion rates above 20% are achieved by only 4% of online retailers. The majority of these online shop operators are professionally positioned in online marketing (including search engine marketing, social media, and campaign management) and online shop management and have already optimized the conversion rate thanks to CRO and A/B or multivariate **testing** (see Chapter 5.4 on A/B and multivariate testing).

Figure 18: What is the average conversion rate in your online shop?

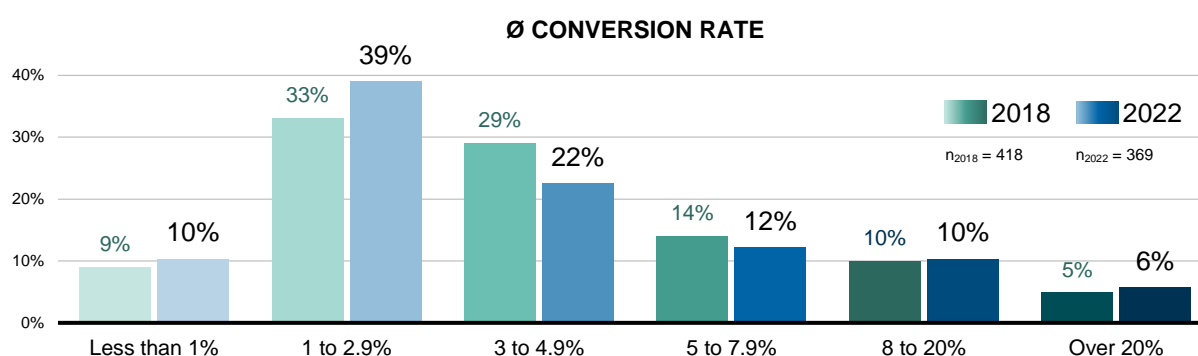


Figure 18 shows that the conversion rates in 2022 (bars in shades of blue on the right of each pair) are somewhat lower than in 2018 (bars in shades of green on the left). This can be explained on the one hand by the increasing number of online offers, visitors with low purchase intent, online shops, transparency, and competitive intensity in e-commerce, and on the other hand by the sample of the two studies.

A closer look at the **conversion rate by product group** in Table 12 shows that tickets (for example, for events and mobility) have a high conversion rate of eight to over 20% for 60% of the respondents. For computers and accessories (24%), cosmetics, and toys (17% each), but also food, the share of high conversion rates of over 8% is relatively high. In the categories of travel (57%), cosmetics (54%) and books, music and films (48%), the conversion rates are mostly in the **middle range**, between three and 7.9%.

A **low conversion rate** of less than one to 2.9% is particularly common in the categories of furniture (67%), fashion (55%), sporting goods (52%), toys, and multimedia and electronic devices (each 50%). This could have to do with the high comparability of these products on the internet and, in the case of omni-channel retailers, with the ROPO effect (Research Online, Purchase Offline).

Table 12: Conversion rate by product group

| Product group                              | High conversion rate<br>8% to >20% | Average conversion rate<br>3% to 7.9% | Low conversion rate<br><1% to 2.9% |
|--|------------------------------------|---------------------------------------|------------------------------------|
| Clothing (n = 77)                          | 6%                                 | 39%                                   | 55%                                |
| Books, music & films (n = 31)              | 0%                                 | 48%                                   | 35%                                |
| Computers & accessories (n = 34)           | 24%                                | 32%                                   | 44%                                |
| Cosmetics (n = 48)                         | 17%                                | 54%                                   | 29%                                |
| Food (n = 63)                              | 16%                                | 43%                                   | 41%                                |
| Furniture (n = 39)                         | 5%                                 | 28%                                   | 67%                                |
| Multimedia & electronic equipment (n = 44) | 14%                                | 36%                                   | 50%                                |
| Travel (n = 7)                             | 14%                                | 57%                                   | 29%                                |
| Toys (n = 54)                              | 17%                                | 33%                                   | 50%                                |
| Sporting goods (n = 63)                    | 8%                                 | 40%                                   | 52%                                |
| Tickets (e.g., events, mobility; n = 10)   | 60%                                | 20%                                   | 20%                                |

Fashion, furniture, electronics, toys, and sporting goods usually have a low conversion rate of below 3% whereas computers and tickets often have a high rate of over 8%.



Finally, Table 13 shows that 22% of **successful online shops have high conversion rates** and 27% have medium conversion rates. Of the respondents with an average level of success, 21% have a medium conversion rate and 39% have a low conversion rate.

**Unsuccessful online shops** practically never have a high conversion rate, but in 88% of cases they have a rather low or very low conversion rate of 3% or less.

These analyses confirm that the subjective self-assessment of the success of one's own online shop correlates very strongly with the conversion rate: the successful sale in online retail. This means: the more successful the online shop, the higher the conversion rate is likely to be.

Table 13: Conversion rate of successful and unsuccessful online shops (no data has been calculated)

| Conversion rate |                           | Successful<br>online shops<br>(n = 326) | Ø<br>(n = 181) | Unsuccessful<br>online shops<br>(n = 49) |
|-----------------|---------------------------|---|----------------|--|
| High            | Very high: >20%           | 8%                                      | 2%             | 0%                                       |
|                 | High: 8% - 20%            | 13%                                     | 7%             | 4%                                       |
| Medium          | Upper midfield: 5% - 7.9% | 15%                                     | 9%             | 0%                                       |
|                 | Below midfield: 3% - 4.9% | 25%                                     | 23%            | 8%                                       |
| Deep            | Rather low: 1% - 2.9%     | 34%                                     | 47%            | 38%                                      |
|                 | Very low: <1%             | 5%                                      | 12%            | 50%                                      |

Successful online shops often have a significantly higher conversion rate than unsuccessful ones.



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## 4. Challenges in E-Commerce

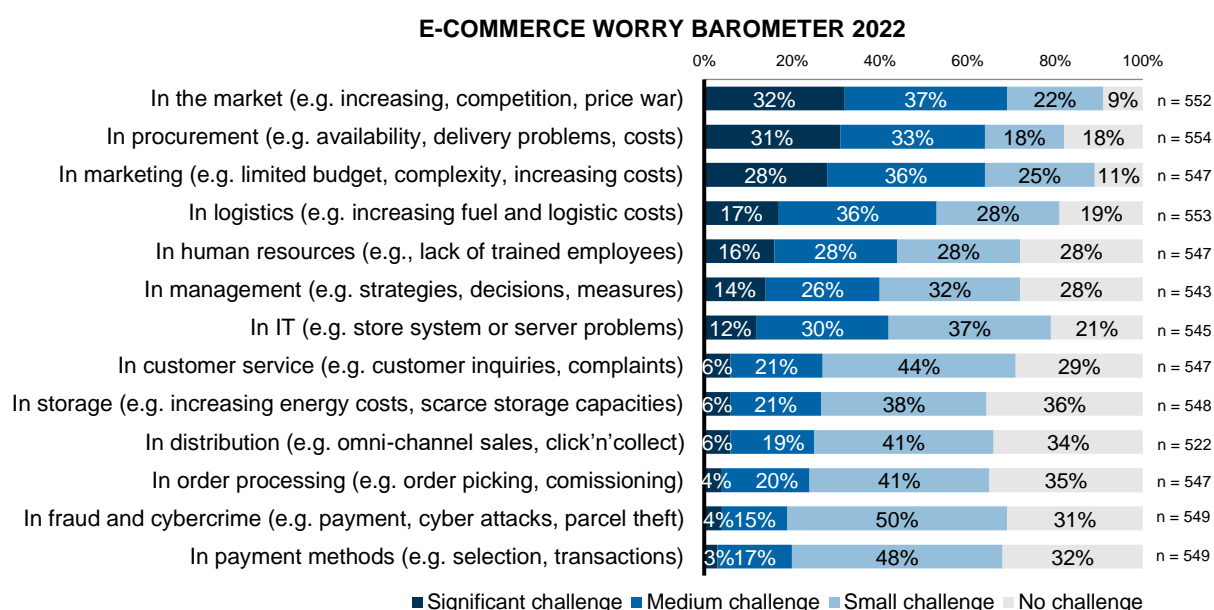
This chapter looks at the challenges in e-commerce using the “worry barometer”, which has been analyzed annually since 2018. It shows that the main problems currently lie in procurement, market developments and marketing. Human resources issues, such as the shortage of skilled workers and the lack of expertise, also present challenges for online retailers. Here the authors also examine procurement and delivery difficulties as well as the consequences of the lifting of the coronavirus measures in more detail.

### 4.1 WORRY BAROMETER IN E-COMMERCE

Since 2018, the authors have conducted an annual survey on the current challenges in e-commerce. Table 14 shows that the challenges faced by online retailers are constantly shifting. Currently, the main problem lies in the **market**, as the e-commerce worry barometer in Figure 19 shows: 69% of retailers agreed that trends like increasing competition in the market, and within it price competition, represent a significant or medium challenge. In 2021, the market was already seen by retailers as a challenge (with 70% citing it as one; see Table 14). In 2020, the market was less of an issue due to the explosion of orders with the outbreak of the pandemic, and then only ranked ninth among challenges (25%).

**Procurement** ranks second in the current worry barometer: almost two-thirds of retailers report that their suppliers cannot deliver or can only deliver with delays, and/or that import, and delivery costs are rising due to inflation. Currently, **imports** are often very difficult because international supply chains are interrupted or because deliveries have become slower and more expensive (see Chapter 4.2). In 2021, the coronavirus crisis posed an even greater challenge to 71% of retailers in terms of procurement. In **marketing**, 28% of respondents also see a significant challenge and 33% see a medium challenge. These include lack of budgets, rising costs or advertising prices (especially with Google and Meta), growing complexity, and reduced effectiveness and efficiency.

Figure 19: In which areas do you currently see the biggest challenges for your online shop?



The significant challenges in e-commerce currently lie in the market, in procurement, and in marketing.





**Logistics** ranks fourth in the worry barometer: more than half of online retailers are currently concerned about rising **fuel and logistics costs**. With 52% respondents identifying this, logistics problems did not increase in 2022 compared to 2021 (54%); see Table 14), but they are shifting.

A medium or major challenge for 44% of retailers is **staffing** and human resources. Obviously, many retailers find it difficult to find new and qualified employees. In addition to the lack of **skilled workers**, the **lack of knowledge and expertise** in e-commerce is often a major problem.

Challenges in **information technology** (IT), which include problems with the shop system or the web server, declined slightly, with 43% of respondents citing this as a challenge.

The coronavirus crisis was a major challenge for **online shop managers** in 2020 (70%) and 2021 (60%), as decisions had to be made on a daily basis regarding personnel, the implementation of protection measures, the introduction of working from home, and adjustments to strategy or product ranges. In 2022, the situation has eased in this regard, and only 40% of online shop managers see themselves challenged in management.

The situation has also calmed down for **customer service**, with only 28% still challenged here. With the outbreak of the pandemic, customer services had a large number of customer enquiries or complaints due to order growth, which was a challenge for almost half of the respondents. In **sales and distribution**, the problems (for example in omnichannel sales or click and collect) have also decreased. In 2021, 57% of respondents were still challenged in sales; in 2022, this figure is only half that, at 28%. Online retailers report fewer problems with product **storage**: Only one in four is still challenged here, while in 2021 this figure was much higher (41%) due to storage bottlenecks.

**Order processing**, i.e., the handling of a high number of orders during the demand shock that came with the pandemic, posed huge challenges for online retailers in 2020. Now, however, after taking appropriate measures and increasing resources, most online retailers have order processing (picking, commissioning, etc.). Now, only 24% still identify order processing as a challenge.

The online retailers were also able to add **further challenges** in an open field. Three retailers see a significant challenge in the general economic situation. Individual online retailers are struggling with specific IT problems, such as the affordable procurement of the right online shop system, its connection to the ERP and CRM, or IT security problems. At one retailer, the different VAT rates in the EU cannot be correctly mapped in the POS (Point of Sale) and in the accounting system.

Table 14: The worry barometer of online retailing (medium and major challenges of 2020, 2021, and 2022 in percent)

| #  | Challenge 2022   | Mentions % | Challenge 2021   | Mentions % | Challenge 2020   | Mentions % |
|----|------------------|------------|------------------|------------|------------------|------------|
| 1  | Market           | 69         | Procurement      | 71         | Management       | 70         |
| 2  | Procurement      | 62         | Market           | 70         | Procurement      | 55         |
| 3  | Marketing        | 64         | Management       | 60         | Order processing | 47         |
| 4  | Logistics        | 52         | Marketing        | 58         | Customer service | 46         |
| 5  | Staff            | 44         | IT               | 58         | Logistics        | 44         |
| 6  | IT               | 43         | Distribution     | 57         | Distribution     | 29         |
| 7  | Management       | 40         | Customer service | 56         | Storage          | 28         |
| 8  | Customer service | 28         | Logistics        | 54         | IT               | 25         |
| 9  | Distribution     | 28         | Order processing | 48         | Marketing        | 25         |
| 10 | Storage          | 25         | Storage          | 41         | Market           | 21         |

Key: Changes in challenges in 2022 compared to previous year: Increased strongly Increased slightly Remained the same Decreased slightly Decreased strongly

The problems of lack of staff and expertise are becoming increasing challenges for e-commerce.



Table 15: Challenges of successful and unsuccessful online shops

| Significant challenge   | Successful online shops<br>(n = 326) | Ø<br>(n = 181) | Unsuccessful online shops<br>(n = 49) |
|---|--------------------------------------|----------------|---------------------------------------|
| Procurement (e.g., delivery difficulties, import problems, costs) | 36%                                  | 36%            | 21%                                   |
| The market (e.g., increasing competition, price pressure)         | 27%                                  | 36%            | 49%                                   |
| Marketing (e.g., tight budgets, complexity, costs)                | 20%                                  | 38%            | 39%                                   |
| Logistics (e.g., rising fuel and logistics costs)                 | 19%                                  | 25%            | 12%                                   |
| Human resources (e.g., new employees, lack of know-how)           | 16%                                  | 14%            | 19%                                   |
| Management (e.g., strategies, decisions)                          | 12%                                  | 15%            | 21%                                   |
| IT (e.g., shop system or server problems)                         | 10%                                  | 9%             | 24%                                   |
| Customer service (e.g., customer enquiries, complaints)           | 7%                                   | 6%             | 4%                                    |
| Storage (e.g., rising energy costs, capacities).                  | 5%                                   | 15%            | 6%                                    |
| Sales / distribution (e.g., omni-channel sales, click & collect)  | 5%                                   | 4%             | 14%                                   |

Successful online retailers have significantly fewer challenges than unsuccessful ones.



Table 15 clearly shows that online shops with an average or low level of success experience more problems in most areas of e-commerce than the successful ones. For example, the unsuccessful are challenged twice as often in the **market** (49% of respondents) and **marketing** (39%) as the successful. In **management** and **IT**, the unsuccessful also face major challenges much more often than the average and the successful. Looking at **sales**, for example, unsuccessful retailers report sales to be a problem at three times the rate of the average or very successful retailers.

Only in logistics, customer service, and procurement do the unsuccessful online shop operators not report these aspects as problems at a greater rate than the others. This last aspect is discussed in more detail in the following section.

## 4.2 PROCUREMENT AND DELIVERY PROBLEMS










The 355 retailers who currently see medium to major challenges in procurement (e.g. supply difficulties, import problems, high delivery and purchasing costs) were asked in a follow-up question to what extent they are affected by the supply chain problems. This question was answered by 307 participating companies in an open text field and visualised in Figure 20.

Currently, **long waiting and delivery times, delivery delays, non-deliverable products and raw material shortages** are the most frequently mentioned problems (compare Wordcloud in Figure 20 and Table 16). Some products or product ranges are not available for months. A statement from an automotive supply dealer illustrates this: “Almost 30% of the products are no longer available”. Another writes: “We currently have extremely long delivery times of more than nine months.”

A bar accessories retailer writes similarly: “We are relatively severely affected by delivery problems and some products are sometimes not available for weeks or months.” A sports and health equipment supplier notes: “For many of our devices, the delivery time has been significantly extended for about a year.” A trader of electronic parts reports: “We sometimes have delivery waiting times of up to 200 days here.” A supplier of sewing accessories also writes of delivery delays and a clothing supplier mentions that the goods come much too late, sometimes even after the fashion season.



Table 16: To what extent are you currently affected by supply chain problems? (In number and percent of mentions; n = 307)

| #  | Supply chain problems   | Number | Mentions in percent   |
|----|---|--------|---|
| 1  | Long waiting and delivery times   | 77     |  25% |
| 2  | Shortages of raw materials / availability problems                        | 58     |  19% |
| 3  | General delivery issues (interruption, breakdowns, problems, bottlenecks) | 53     |  17% |
| 4  | Delivery problems in Asia / Far East / Oversea                            | 28     |  9%  |
| 5  | High / Raising costs (transport, import, procurement, logistics etc.)     | 15     |  5%  |
| 6  | Increased prices  | 13     |  4%  |
| 7  | Procurement difficulties and production                                   | 7      |  2%  |
| 8  | Expensive or missing containers   | 4      |  1%  |
| 9  | Production problems   | 2      |  1%  |
| 10 | Delivery problems cause of the war in Ukraine                             | 2      |  1%  |

One out of five traders reports shortages of raw materials or availability problems, and of supply interruptions, supply interruptions, supply problems or bottlenecks.



One out of five online retailers have a **shortage of raw materials and materials** that cannot be produced or delivered (compare #2 in Table 16). A car accessories retailer writes that they are strongly affected by raw material shortages of chemicals and plastic granulate and regarding the **bottlenecks of container ships**. An automotive accessories supplier, a toy retailer and a leading pure player report high **container prices** (see #8 in Table 16).

A cosmetics online shop operator writes that **procurement** has become more time-consuming overall and **prices** have risen sharply or are continuing to rise (cf. citation #6 in Table 16): “*International sourcing has become much more time consuming. Freight prices are greatly increased and currency fluctuations are increasing.*” Some sports and outdoor suppliers are also struggling with increased prices, pending orders and non-deliverable material.

Also frequently mentioned were high or rising **transport, import and handling costs** (see #5 in Table 16). A Swiss food retailer notes that they have supply chain problems when ordering from abroad and are affected by massive price increases. A trader of electronic accessories speaks of a dramatic situation: “*Distributors increase prices daily because of high transport costs from Asia, our warehouses are empty.*”

The procurement difficulties sometimes also lead to **production problems** (compare #7 in Table 16). A food trader writes: “*Certain raw materials are not available, which leads to the fact that we can hardly or not at all produce certain products.*”

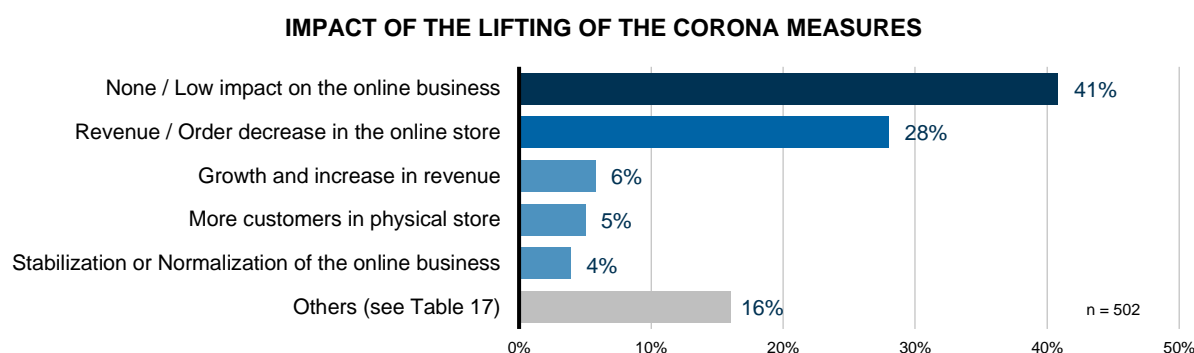
For some retailers, raw material producers and suppliers from **Ukraine** cannot deliver due to the war (see #10 in Table 16). For example, an online shop for cleaning products writes: “*The procurement of raw materials is difficult due to the war in Ukraine.*”

Some companies mention that they have not had any major procurement and delivery problems due to good planning, increased stock levels or the products they offer. One clothing shop writes that they are less affected because they source their products from the South American region. A sporting goods retailer specifies that they have less problems because their products are made in Germany, and a wine online shop mentions: “*We are slightly affected, but not (yet) seriously thanks to high stock levels.*”





Figure 22: «What impact will the lifting of the coronavirus measures have on your online business» (mentions in percent; n = 502)



For two out of five retailers, the lifting of the Corona measures had no impact on online business. Sales declined at every fourth online shop.



Some online shops show **growth** and an **increase in sales** of online business (six percent in Figure 22). A leading omnichannel clothing retailer generally observes more online purchases as customers have become accustomed to ordering online. A B2B plumbing and heating retailer notes further sales growth in online business and a B2B omnichannel retailer mentions equally positive: *“The introduction of the measures has led to a wave of new customer registrations in the web shop.”*

A cosmetics online retailer writes: *“We had immediate increases in sales, as the customers we supply are again allowed to operate fully as before.”* Further, an online shop from Austria describes, *“We had an exceptional growth in turnover and sales.”* An outdoor and camping supplier also notes no significant impact and continues to grow. A company active in the **sports event sector** unsurprisingly notes a doubling of turnover. A supplier of gifts and photo products reports: *“Large events and smaller private events can take place again. So more gifts are needed again, or promotional products and event products, which is our main business.”* A company that sells **tickets** for tourism events also writes that they have seen more bookings since the measures were lifted.

Several omnichannel retailers (five per cent in Figure 22) report that they are again registering **more customers in the retail shop** and a slight decline in online trade. One gift retailer writes: *“Customers are more likely to come into the shop again, sales are growing.”* A clothing and jewellery shop describes a better **distribution of sales between brick-and-mortar and online** and a slight decrease in online orders compared to the pandemic period.

A **bicycle retailer** writes that they now have *“more physical buying consultations in the store again”*. Another bicycle retailer in B2C also observes this: *“Expensive items such as e-bikes are again increasingly bought in the retail shop and less ordered directly online. Information continues to be obtained online”*. And he adds: *“The habit of ordering online seems to have remained.”*

**Wine merchants** observe a similar effect: *“Online sales declined because more wine is being drunk in restaurants again instead of at home.”* Another large B2C omnichannel retailer describes, *“Some online sales are shifting to brick-and-mortar.”* A large sporting goods retailer notes, *“Shop re-openings have reduced sales concentration on the online shop.”*

In the **furniture industry**, the situation is similar, a furniture omnichannel retailer reports: *“Online sales declined. Stationary sales in the shop, at trade fairs and in the field rose again. In general, however, we were able to double online sales compared to 2019.”*

Table 17: « What impact will the lifting of the coronavirus measures have on your online business » (in number of mentions, n = 502)

| # | 1) Negative impact               |     | 2) None / low impact  |     | 3) Positive impact     |    |
|---|----------------------------------|-----|-----------------------|-----|------------------------|----|
| 1 | Decline in revenues              | 110 | No impact             | 176 | Growth                 | 16 |
| 2 | Decline in sales                 | 32  | Low impact            | 29  | Increase in sales      | 13 |
| 3 | More customers in physical store | 26  | Stagnation            | 8   | Positive impact        | 8  |
| 4 | Decline (e.g., demand)           | 9   | Stabilization         | 7   | Growth in order        | 6  |
| 5 | Less traffic                     | 3   | Impacts not clear yet | 5   | Increase events, fairs | 5  |
| 6 | Negative impact                  | 3   | Normalization         | 5   | New registrations      | 3  |
| 7 | High impact                      | 2   | New online shop       | 5   | Doubling revenues      | 2  |

The lifting of the Corona measures had a positive impact on the omnichannel providers on the stationary trade.



A clothing online shop operator says that **inspiration is being drawn online** and more is being purchased offline. A leading sporting goods retailer expertly expresses, “We are seeing a moderate decline from online traffic and e-commerce conversion rate. The ROPO effect is on the rise again.” This means that after the Corona measures have been lifted, more customers are **getting information online, but making the purchase offline in the store** (ROPO: Research Online, Purchase Offline).

Furthermore, some mentioned that they notice a **stabilization or normalization** of online business (compare #3, #4 and #6 in column two of table 17). The CEO of one of the largest online shops in Switzerland writes that the **growth figures will normalize** in 2022. The description from a large home electronics retailer also supports a normalization: “Online sales are back to normal, compared to the previous year they have declined.” A games, sports and hardware retailer observes: “Sales of some ranges settled back to pre-crisis levels.”

An Austrian online bookseller, like many others, writes that **sales have declined**, but at a much **higher level** than before the pandemic. A B2B retailer summarizes: “Online sales are down compared to 2021 and 2020, but they are much higher than in 2019. In the first five months of 2022, we reached the annual sales of 2019.” Another online retailer describes similar: “Sales declined, stabilizing at a much higher level than before the measures.” A computer accessories retailer also writes: “During Corona, we were able to increase sales significantly, since lifting it has remained stable at a high level.” An office supplies retailer also confirms what is true for many online retailers: “Online orders declined, but remained higher than before Corona.” Furthermore, a large multimedia and electronics supplier records that online business has stagnated since the measures were lifted, but is at a high level.

For some study participants, the **effects are not yet clear** or they are still implementing the new online shop. A small online shop operator with a focus on winter clothing describes that they cannot make a statement on how high the impact on their online business will be before next winter. Another retailer writes that it is not yet possible to make a statement because the webshop has just been launched and is being professionally developed and expanded.

The establishment and further development of an online shop includes various marketing instruments, which are discussed in the next chapter.

## 5. Marketing in E-Commerce

Due to the growth in orders during the coronavirus pandemic, the successful marketing of online shops became more important than ever. Only those who are able to not only bring internet users to their own website but then convince them to buy can succeed in selling (or selling more) online. This chapter shows how relevant the various marketing instruments for online retailing currently are. We can empirically confirm that search engine, newsletter and social media marketing as well as A/B and multivariate testing are central instruments for large online shops.

### 5.1 MARKETING INSTRUMENTS

An important question to the online retailers was which marketing instruments they use to address customers and potential customers in order to make them aware of their own offerings and to lead them to the online shop. Figure 23 shows that **search engine optimization (SEO)** remains the most important digital marketing tool for almost all online shops: 71% consider it a relevant marketing tool, and another 16% consider it quite relevant. Here SEO is understood to mean all measures that aim to make an online shop's offerings appear in the top positions of the organic search results of search engines such as Google. **Google** is an important source of traffic and revenue for practically all online shops, both small and large, in B2B and B2C (see Table 19). It is business-critical for every online shop to be listed as high as possible on Google search results for product and sales-relevant search terms (keywords). Therefore, SEO in digital marketing and commerce is a continuous, demanding, complex, and often still underestimated mandatory task.

Figure 23: How relevant are the following marketing instruments for your online shop?



No successful online store operator can avoid search engines, newsletters, and social media marketing.





Search engine and social media marketing are the winners of the coronavirus crisis; advertisements, newspaper supplements, and sponsoring are among the big losers.



**Search engine advertising (SEA)** is the second most important marketing instrument in e-commerce according to this survey. The results of search engine advertising, also called sponsored links, keyword ads or text ads (Kreutzer 2020), generate sales for online shops. For 74% of online retailers, **search engine ads** are relevant to their brand or products. The slight decline in SEA compared to the previous year (see Table 16) is also related to the sample, as slightly smaller online shops participated in the study in 2022. SEA is less frequently relevant for small online shops than for the large ones, as Table 19 shows. Since Google has a market share of over 93% in Switzerland and Austria (StatCounter 2022), many online shop operators are forced to run **Google Ads**. Online retailer dependence on Google remains high in search engine marketing, especially for successful online shops. This is because among the successful ones, 74% place search engine ads, as compared to 65% of the unsuccessful ones (see Table 19).

Another digital marketing instrument that retailers cannot do without is **newsletter and e-mail marketing**: three out of four consider this form of marketing to be relevant. Newsletters and e-mails are important contact points, especially in the marketing communication of larger online shops, when aiming to draw attention to relevant topics and offers. Newsletters are also an effective and efficient instrument for customer loyalty in B2B and B2C. Online retailers who carry out newsletter marketing are demonstrably more successful, as Table 19 shows.

**Social media advertising**, i.e., ads on social platforms such as Facebook, Instagram, Twitter, TikTok, or LinkedIn, is also one of the standard instruments of digital marketing (Bernet/ZHAW 2020). The possibility of addressing high-potential customer segments on social media with a high reach by means of targeting (e.g., according to topics, interests, age, gender, and location) remains relevant for seven out of ten retailers.

**Direct marketing** is also listed in the top five marketing instruments for online shops (relevant for 42%; see Figure 23 and Table 18). **Direct mailings** are sent much more frequently by large online shops (60%; see Table 19) than small ones (38%). In e-commerce, flyers are often printed and sent as package inserts or product catalogues with current offers.

Table 18: The 10 most relevant e-commerce marketing instruments in 2019, 2021 and 2022 (very/somewhat relevant tools in percent)

| #  | Instruments 2022         | %  | Instruments 2021         | %  | Instruments 2019         | %  |
|----|--------------------------|----|--------------------------|----|--------------------------|----|
| 1  | SEO                      | 87 | SEO                      | 92 | SEO                      | 93 |
| 2  | SEA                      | 74 | Newsletter / E-Mail      | 82 | Newsletter / E-Mail      | 83 |
| 3  | Newsletter / E-Mail      | 76 | SEA                      | 79 | SEA                      | 82 |
| 4  | Social media advertising | 68 | Social media advertising | 70 | Social media advertising | 67 |
| 5  | Direct marketing         | 42 | Retargeting              | 44 | Retargeting              | 57 |
| 6  | Retargeting              | 37 | Direct marketing         | 40 | Direct marketing         | 52 |
| 7  | Banner advertising       | 33 | Banner advertising       | 39 | Banner advertising       | 51 |
| 8  | Video advertising        | 27 | Influencer Marketing     | 28 | Advertisements / inserts | 39 |
| 9  | Advertisements / inserts | 27 | Video advertising        | 27 | Sponsoring               | 35 |
| 10 | Sponsoring               | 25 | Advertisements / inserts | 22 | Influencer Marketing     | 34 |

Key: Change in relevance of the instrument in 2022 compared to the previous year Increased strongly Increased slightly Remained the same Decreased slightly Decreased strongly

With Instagram/Facebook Shops, Instagram and Facebook ads are becoming increasingly important in social commerce.



## Display advertising, affiliate marketing, and retargeting will lose importance with the forthcoming ban on 3<sup>rd</sup> party cookies.



By means of social media advertising and classic banner advertising, interested visitors to a retailer's online shop can be addressed again on third-party sites; this is known as **retargeting**. One out of three of the respondents make use of the instrument of remarketing; 37% classify it as relevant or somewhat relevant for their own business. This is significantly less than in 2019, when 57% of online retailers rated retargeting as relevant. **Behavioral targeting** by means of banner advertising will continue to lose relevance from 2023 onwards as the elimination of third-party cookies in Google's Chrome browser goes into effect. Thus, the share of retargeting and affiliate marketing (Table 18) will probably continue to decline and become less important in e-commerce. Retargeting on Google or on social media such as Facebook, Instagram and LinkedIn is not affected by this.

Banner or **display advertising** has consistently ranked seventh among the most popular marketing instruments in recent years (see Table 18). Nevertheless, this oldest type of online advertising seems to be losing relevance: Only one in three online retailers still consider banner advertising relevant. Large online shop operators (see Table 19) are twice as likely to place banner ads as small ones (57% vs. 24%, respectively). Similarly, successful retailers pay for links to the online shop significantly more often than unsuccessful ones (36% vs. 26%). **Video advertising**, especially **YouTube ads**, is similarly relevant for one out of four of the online shops surveyed. Like Netflix, Disney and Spotify, video marketing channels can be seen as the winners of the coronavirus crisis. Video as an advertising format will probably continue to grow (especially among the big retailers) and gain market share.

**Advertisements or newspaper inserts** are relevant to sales for 27% of the online retailers surveyed. By the beginning of the coronavirus crisis, the relevance of advertisements and newspaper inserts had declined sharply, and this instrument lost even more ground in the wake of the coronavirus crisis. In 2022, the use and relevance of advertisements and newspaper inserts increased somewhat, as Table 18 shows. Large online shop operators place advertisements in newspapers and magazines more frequently (39%) than the small ones (25%) (see Table 17).

Within a short period of time, **influencer marketing** has established itself in e-commerce and has become relevant for 23% of online shops. In B2C, Instagram, Facebook, and TikTok are the most used platforms on which influencers place products or services to authentically promote themselves to their followers (see Chapter 5.3). A similar number, one in four retailers, consider **sponsorship** to be an effective marketing instrument, at least when it comes to increasing brand awareness. However, sponsorship has lost relevance: While it was still considered relevant by 35% of online shops in 2019, it was significantly less in 2021 and 2022. Sponsorship is more important for large retailers (37%; see Table 19) than for small ones.

In **affiliate marketing**, digital ads are placed and the affiliate, such as AWIN or TradeDoubler, is billed on a commission basis according to the number of sales. This performance marketing instrument is popular with some online retailers: 14% still consider it important, but affiliate marketing also seems to be losing importance and has not made it into the top 10 marketing tools since 2019. Classical types of advertising such as **outdoor advertising**, i.e., advertising with **physical posters** or digital screens on streets, in public places or in public transport, have clearly lost importance. These are relevant for 19% (Figure 23), and for 38% of the big players (Table 19).

**TV and radio advertising** is also losing relevance for e-commerce. Only one in ten retailers still identifies TV as relevant for their business, while looking at the big players it this figure is still nearly one in three (Table 19). Smaller online shops in particular are less able to afford the expense of this kind of advertising. **Radio advertising** is still considered relevant by an average of 12% of retailers, and twice as many (23%) of the big players.

## Large online shops with more human and financial resources use more marketing tools than small ones.



Table 19: Marketing instruments by business relationship, online shop size and success

| Marketing instrument                      | Total<br>(Fig. 22) | Business relationship |                  | Online shop size           |                            | Online shop success     |                          |
|---|--------------------|-----------------------|------------------|----------------------------|----------------------------|-------------------------|--------------------------|
|   |                    | B2B<br>(n = 272)      | B2C<br>(n = 553) | Small (<4 MA)<br>(n = 348) | Large (>21 MA)<br>(n = 77) | Successful<br>(n = 326) | Unsuccessful<br>(n = 49) |
| Search engine optimization (SEO)          | 87%                | 85%                   | 88%              | 82%                        | 92%                        | 87%                     | 78%                      |
| Search engine advertising (Google ads)    | 74%                | 72%                   | 75%              | 65%                        | 96%                        | 74%                     | 65%                      |
| Newsletter / e-mail marketing             | 76%                | 78%                   | 76%              | 58%                        | 95%                        | 81%                     | 68%                      |
| Social media advertising (e.g. Instagram) | 68%                | 64%                   | 68%              | 68%                        | 74%                        | 65%                     | 66%                      |
| Direct marketing (mailings, flyers)       | 42%                | 42%                   | 41%              | 38%                        | 60%                        | 44%                     | 49%                      |
| Retargeting (e.g. AdForm, DoubleClick)    | 37%                | 35%                   | 38%              | 27%                        | 80%                        | 42%                     | 26%                      |
| Banner / display advertising              | 33%                | 29%                   | 34%              | 24%                        | 57%                        | 36%                     | 26%                      |
| Video advertising (e.g. YouTube Ads)      | 27%                | 25%                   | 28%              | 20%                        | 52%                        | 33%                     | 18%                      |
| Advertisements / supplements              | 27%                | 26%                   | 27%              | 25%                        | 39%                        | 28%                     | 19%                      |
| Sponsoring                                | 24%                | 24%                   | 23%              | 23%                        | 37%                        | 26%                     | 8%                       |
| Influencer Marketing                      | 23%                | 22%                   | 24%              | 22%                        | 27%                        | 23%                     | 12%                      |
| Outdoor advertising                       | 19%                | 18%                   | 19%              | 14%                        | 38%                        | 21%                     | 26%                      |
| Affiliate marketing                       | 14%                | 15%                   | 13%              | 11%                        | 33%                        | 18%                     | 6%                       |
| Radio advertising                         | 12%                | 12%                   | 12%              | 8%                         | 23%                        | 13%                     | 10%                      |
| Television advertising                    | 10%                | 8%                    | 11%              | 4%                         | 31%                        | 13%                     | 4%                       |
| Sponsored Content                         | 13%                | 13%                   | 12%              | 9%                         | 29%                        | 14%                     | 15%                      |
| Live shopping                             | 8%                 | 9%                    | 8%               | 7%                         | 15%                        | 10%                     | 6%                       |

Successful online retailers engage in search engine, newsletter, and video marketing more often than unsuccessful ones.



**Sponsored content** and native advertising, i.e., the publication of editorial content such as public reports, white papers, studies, or infographics, ranks towards the bottom of Figure 22 earlier, with 13% of respondents indicating this as relevant or quite relevant. As with the other marketing instruments, the operators of large online shops publish sponsored content far more frequently (29%) than the smaller ones (9%; see Table 17). For example, **live shopping**, as has been increasingly used as a sales tool in China since the outbreak of the pandemic, is not yet frequently used in the DACH region and is only a relevant marketing tool for 8% of retailers. The large retailers rate live shopping as more relevant for the future than the small ones (15% as compared to 17% in Table 17).

## 5.2 SOCIAL MEDIA ADVERTISING

As studies and field reports in recent years have already shown, advertising on social media is a central online marketing tool for many companies, and more and more online retailers are using social media for advertising purposes. **Facebook** and **Instagram** are by far the most frequently used by retailers for advertising purposes (94% and 86%, respectively; see Figure 23).

**Facebook Ads** are used equally often by both small and large online shop operators, as well as by B2B and B2C retailers, as Table 18 shows. **Instagram ads** are used slightly more frequently in B2C (88%) than in B2B (79%). Large online shop operators are more likely to advertise on Instagram than small ones. Two out of five online retailers place **ads on YouTube**, Google's video platform.

It is noticeable in Table 18 that large online shops advertise on YouTube at twice the rate of small ones (68% vs. 33%). About 39% of online retailers use **LinkedIn ads**; not surprisingly, large companies in B2B are far more likely to advertise on LinkedIn (52%) than small ones in B2C (36%).

Figure 24: On which social platforms does your company advertise (in social media advertising)? (Multiple answers possible)

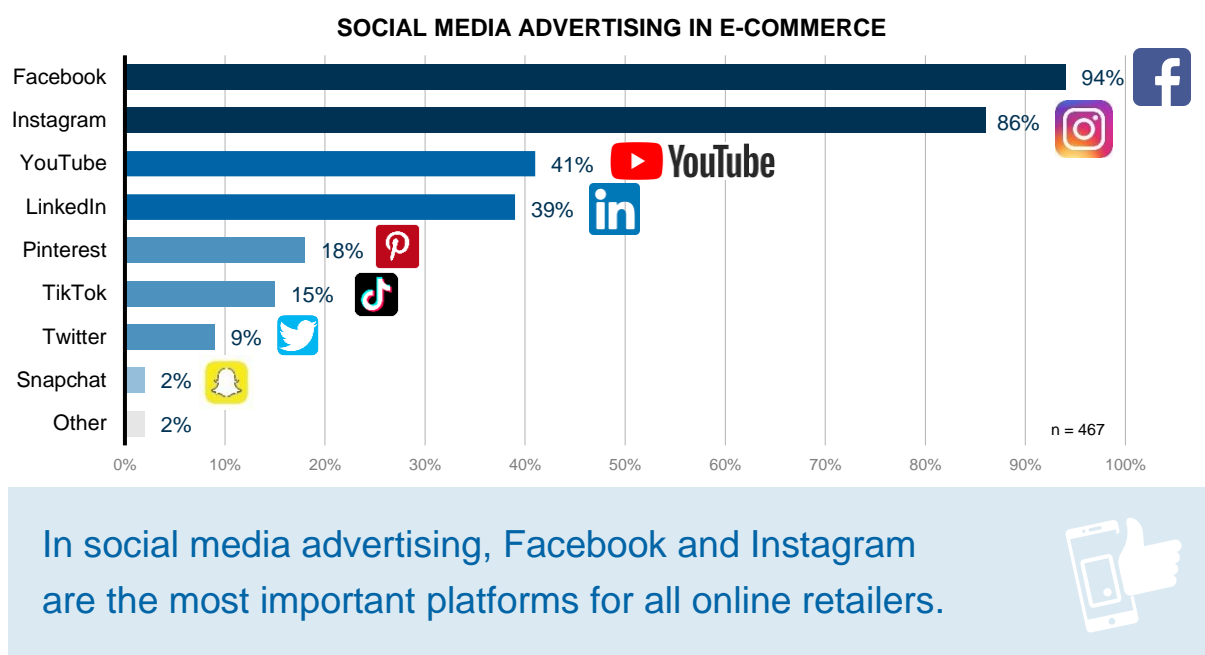


Table 20: Social media advertising by sales type, business relationship, online shop size and online shop success

| Advertising platform | Distribution type     |                       | Business relationship |               | Online shop size        |                         | Online shop success  |                       |
|----------------------|-----------------------|-----------------------|-----------------------|---------------|-------------------------|-------------------------|----------------------|-----------------------|
|                      | Omnichannel (n = 322) | Pure Player (n = 179) | B2B (n = 272)         | B2C (n = 553) | Small (<4 MA) (n = 348) | Large (>21 MA) (n = 77) | Successful (n = 326) | Unsuccessful (n = 49) |
| Facebook             | 97%                   | 88%                   | 92%                   | 94%           | 92%                     | 93%                     | 93%                  | 87%                   |
| Instagram            | 89%                   | 81%                   | 79%                   | 88%           | 84%                     | 93%                     | 86%                  | 74%                   |
| YouTube              | 47%                   | 31%                   | 39%                   | 42%           | 33%                     | 68%                     | 45%                  | 34%                   |
| LinkedIn             | 37%                   | 31%                   | 52%                   | 36%           | 29%                     | 51%                     | 39%                  | 29%                   |

By comparison, Swiss and Austrian online retailers are relatively less inclined to place social media ads on **Pinterest** (18%), **TikTok** (15%), **Twitter** (9%) and **Snapchat** (2% in Figure 23).

It can be further concluded from Table 18 that **omnichannel retailers** advertise more frequently on social media than pure players, and **large online retailers** advertise much more frequently on the various platforms than the small ones. In addition, it is true on all platforms that **successful online shop** operators are more active than the unsuccessful ones. As this and other studies show, it can be assumed that the use of social media as an advertising platform will also increase among online retailers in the coming years.

### 5.3 INFLUENCER MARKETING

Influencer marketing has become more important for some companies in recent years, as this long-term study also shows. The analysis of the importance of influencer marketing in Figure 25 shows that over 61% of retailers **do not currently work with influencers**, but 13% are planning to do so. On the one hand, this shows a certain skepticism but on the other hand it points to a possible lack of expertise on the part of retailers in the area of influencer marketing.

Of the 572 online retailers surveyed, **one out of four work with influencers**, creators and/or testimonials (see Figure 25). A small proportion (4%) of online retailers consider this cooperation to be unsuccessful. A further 18% assess the cooperation with influencers as moderately successful, and 3% as very successful. A follow-up question concerned the **multiplication factor of influencers** (see Figure 26). While 18% of the retailers estimate this influence of influencers on the conversion rate as rather high to very high, 60 % assess it as low or rather low. This means that the multiplication effects in influencer marketing are moderate.

Figure 25: Do you work with influencers (creators, testimonials)?

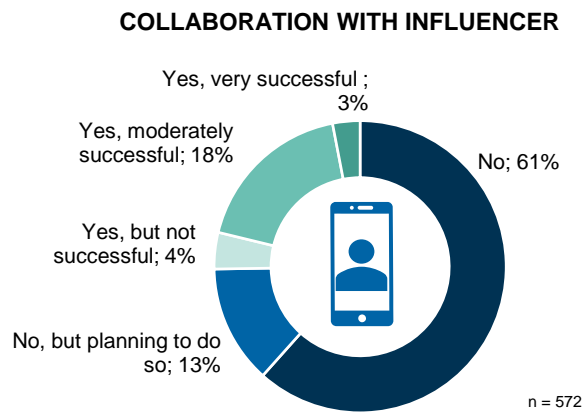
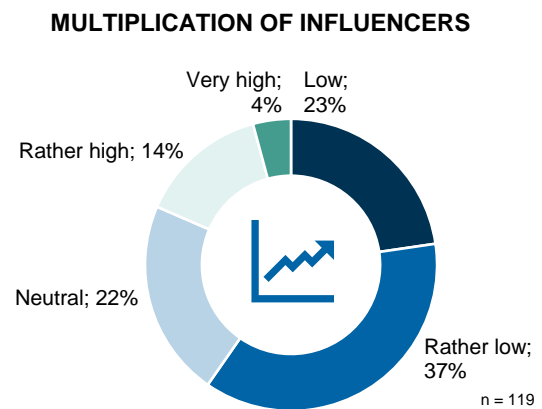


Figure 26: How high is the multiplication factor of an influencer for you (influence of influencers on the conversion rate)?



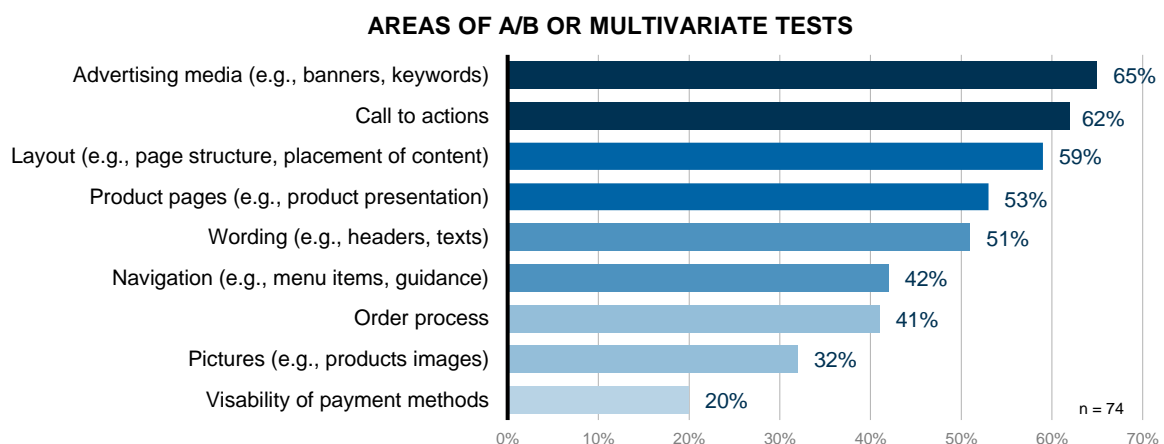
One in five online retailers already works successfully with influencers, creators or testimonials.



#### 5.4 A/B AND MULTIVARIATE TESTS

A/B testing, also called **split testing**, is a form of online experiment generally used in the area of usability testing or in digital marketing. The central goal of these tests in e-commerce is to increase the conversion rate. Of the 509 responses to the question about conversion systems, 15% stated that they use a system for **A/B or multivariate tests** (see Figure 29). Three out of five online retailers use testing in the areas of **advertising and call-to-action**, clearly demonstrating its increased use in the area of digital marketing (see Figure 27). Fifty-nine percent carry out tests in the course of the **layout design** of the webshop, and 53% conduct testing of the presentation on **product pages**. Fifty-one percent report that they test the **wording** (for example, headlines or texts). Likewise, **navigation** (42%) and the **ordering process** (41%) are frequently tested to increase the conversion rate. The results indicate that online retailers test **images** (32%) and the visibility of the payment methods offered (20%) relatively rarely.

Figure 27: In which areas do you conduct A/B or multivariate tests? (Multiple answers possible)



A/B or multivariate tests are carried out by only 15% of (large) online shops. These optimize the advertising media, calls to action, product pages, layout, and order processes.



## 6. Systems & Services in E-Commerce

In e-commerce, many software providers compete for shares in a dynamic and growing market. At the same time, online shops are providing more and more functionalities and services that customers expect. These include product filters, discount codes, free delivery, shipment tracking, product ratings, and the recommendation of alternative or additional products. For omnichannel retailers, click and collect, a shop finder, and display of store availability are also standard. Live chat, virtual tours and video consultations have gained in importance for some online retailers since the beginning of the coronavirus crisis.

### 6.1 ONLINE SHOP SYSTEMS

When online retailers were asked which online shop system they use, the responses varied. Figure 28 shows that many different online shop solutions are used. Changes can be seen in the **in-house developments**: While in 2021 almost 22% of the respondents preferred in-house development, in 2022 that figure is only 16%. Smaller and medium-sized online shops in particular are generally created with standard solutions, while large online shops tend to use their own development more often.

A large proportion of online retailers use **WooCommerce/Wordpress** (16%), **Shopware** and **Magento** (Adobe Commerce; 10% each). These are followed by other solutions such as **PrestaShop** (5%), **Shopify**, **JTL** (4% each), and **SAP Commerce** and **PepperShop** (3% each). Two percent indicated MyCommerce from Localsearch. NopCommerce, Salesforce Commerce, OpenCart, Gambio, Jimdo, Joomla, and Pimcore are all used by around 1%. Almost one in every four online retailers uses a different online shop system; these are listed in Table 19, and include ECWID, Sana Commerce, ShopFactory, xt:Commerce 4, and many other names. The large range of software solutions shows that the market for online shop systems continues to be very dynamic, competitive, demanding, and complex.

Figure 28: Which online shop system do you use?

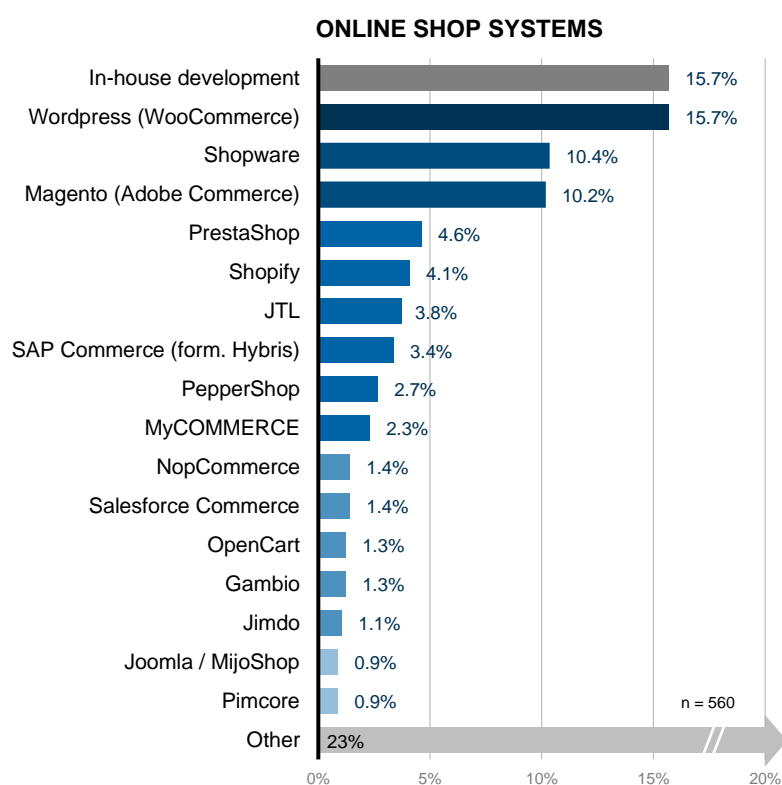


Table 21: Other online shop systems mentioned

| #  | Other shop systems | Number |
|----|--------------------|--------|
| 1  | ECWID              | 4      |
| 2  | Sana Commerce      | 4      |
| 3  | ShopFactory        | 3      |
| 4  | xt:Commerce 4      | 3      |
| 5  | Big Commerce       | 2      |
| 6  | Bwise              | 2      |
| 7  | Cloudrexx          | 2      |
| 8  | Concerto           | 2      |
| 9  | Magnolia           | 2      |
| 10 | Modified eCommerce | 2      |
| 11 | Odoo               | 2      |
| 12 | Opacc              | 2      |
| 13 | OXID eSales        | 2      |
| 14 | Plentymarkets      | 2      |
| 15 | Rent-a-Shop        | 2      |
| 16 | Smartstore.net     | 2      |
| 17 | Wixx               | 2      |
| 18 | Drupal             | 1      |
| 19 | Spryker            | 1      |

## 6.2 SYSTEM INTEGRATION

IT architectures of online retailers are complex, especially for larger online shops. Typically, various core and peripheral information systems are integrated via the source code and interfaces of the online shop, and the same applies for data import or export. Figure 29 shows how often which information systems are integrated into the online shop system.

More than two-thirds of retailers have integrated a **digital analytics system** (generally Google Analytics) via the source code of the online shop. This automatically records and evaluates all clicks and page views of website users. Here, it is the analyses of product page accesses and the checkout process that are relevant for every online shop operator. Nevertheless, operators of small and young online shops have development potential here.

**Newsletter and campaign tools** are the second (58%) most frequently integrated into the online shop system (as compared to 56% in Figure 29). This is followed by the **CMS** (Content Management System), with 44% and integrations of the **ERP** (Enterprise Resource Planning) and the **inventory management system** (42%). More than one in three online shops now has a **CRM** (Customer Relationship Management) system connected. It is noticeable that all these systems are used twice as often in large online shops as in small ones (see Table 20). Online shop systems with integrated CMS, ERP, CRM and inventory management systems tend to be more professional and successful than those without.

One in four has a **credit rating system**, for example from CRIF, and a **PIM** (Product Information Management). 22 % of the retailers have a **marketing automation** system fully integrated. In Table 22, it is noticeable that PIM and marketing automation are used many times more frequently in large online shops than in small (or smaller) ones. As far as these information systems are concerned, the small online retailers are also much less broadly and professionally positioned than the large ones for reasons of resources.

**POS** (point of sale) systems and **checkout systems** are used in omnichannel retailing and are integrated in 19%. **Loyalty programs**, customer cards and the system for **A/B or multivariate tests** as discussed above are connected to 15% of online shops. Large online shops in particular frequently test their advertising, keywords, call to actions, layouts, and the order process (see Table 22 and Figure 27 in Chapter 5.4). Only a small proportion of online shops (6%) use a **CDP** (Customer Data Platform), **DMP** (Data Management Platform), a **DAM** or **MAM** (Digital/Multimedia Asset Management) or a Service Bus System.

Figure 29: Which information systems have you integrated into the online shop system? (Multiple answers possible)

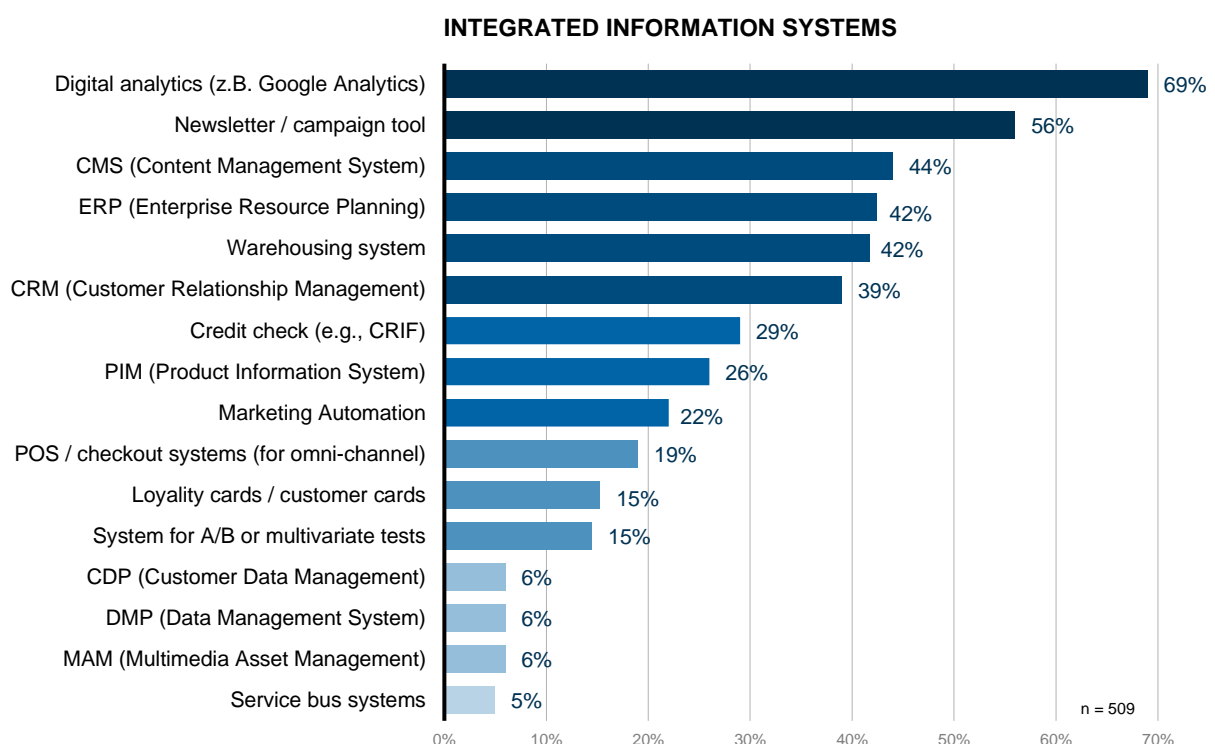




Table 22: Integrated information systems according to business relationship, online shop size and success

| Integrated information system              | Total<br>(Fig. 28) | Business relationship |                  | Online shop size           |                            | Online shop success     |                          |
|--|--------------------|-----------------------|------------------|----------------------------|----------------------------|-------------------------|--------------------------|
|  |                    | B2B<br>(n = 272)      | B2C<br>(n = 553) | Small (<4 MA)<br>(n = 348) | Large (>21 MA)<br>(n = 77) | Successful<br>(n = 326) | Unsuccessful<br>(n = 49) |
| Digital analytics (e.g., Google Analytics) | 69%                | 69%                   | 70%              | 64%                        | 80%                        | 69%                     | 62%                      |
| Newsletter / campaign tools                | 56%                | 59%                   | 56%              | 51%                        | 72%                        | 57%                     | 35%                      |
| CMS (content Management system)            | 44%                | 47%                   | 45%              | 36%                        | 71%                        | 49%                     | 35%                      |
| ERP (enterprise resource planning)         | 42%                | 50%                   | 41%              | 31%                        | 69%                        | 48%                     | 35%                      |
| Warehouse management system                | 42%                | 42%                   | 45%              | 37%                        | 54%                        | 47%                     | 29%                      |
| CRM (customer relationship mgmt.)          | 39%                | 43%                   | 40%              | 32%                        | 65%                        | 43%                     | 41%                      |
| Credit check (e.g., CRIF)                  | 29%                | 32%                   | 30%              | 31%                        | 45%                        | 35%                     | 12%                      |
| PIM (product information system)           | 26%                | 30%                   | 30%              | 14%                        | 57%                        | 32%                     | 18%                      |
| Marketing automation                       | 22%                | 21%                   | 22%              | 13%                        | 40%                        | 25%                     | 6%                       |
| POS / cash register system                 | 19%                | 19%                   | 21%              | 16%                        | 29%                        | 22%                     | 12%                      |
| Loyalty programs / customer cards          | 15%                | 14%                   | 17%              | 9%                         | 33%                        | 18%                     | 12%                      |
| System for A/B or multivariate tests       | 15%                | 13%                   | 16%              | 7%                         | 43%                        | 19%                     | 6%                       |
| CDP (customer data platform)               | 6%                 | 5%                    | 6%               | 2%                         | 17%                        | 6%                      | 6%                       |
| DMP (data management platform)             | 6%                 | 4%                    | 6%               | 1%                         | 11%                        | 7%                      | 6%                       |
| MAM (multimedia asset management)          | 6%                 | 5%                    | 5%               | 1%                         | 13%                        | 7%                      | 3%                       |
| Service bus systems                        | 5%                 | 6%                    | 5%               | 2%                         | 15%                        | 7%                      | 0%                       |

Large and successful online shops have significantly more integrated systems for newsletters, testing, marketing automation, and credit checks.



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### 6.3 SERVICES AND FUNCTIONS

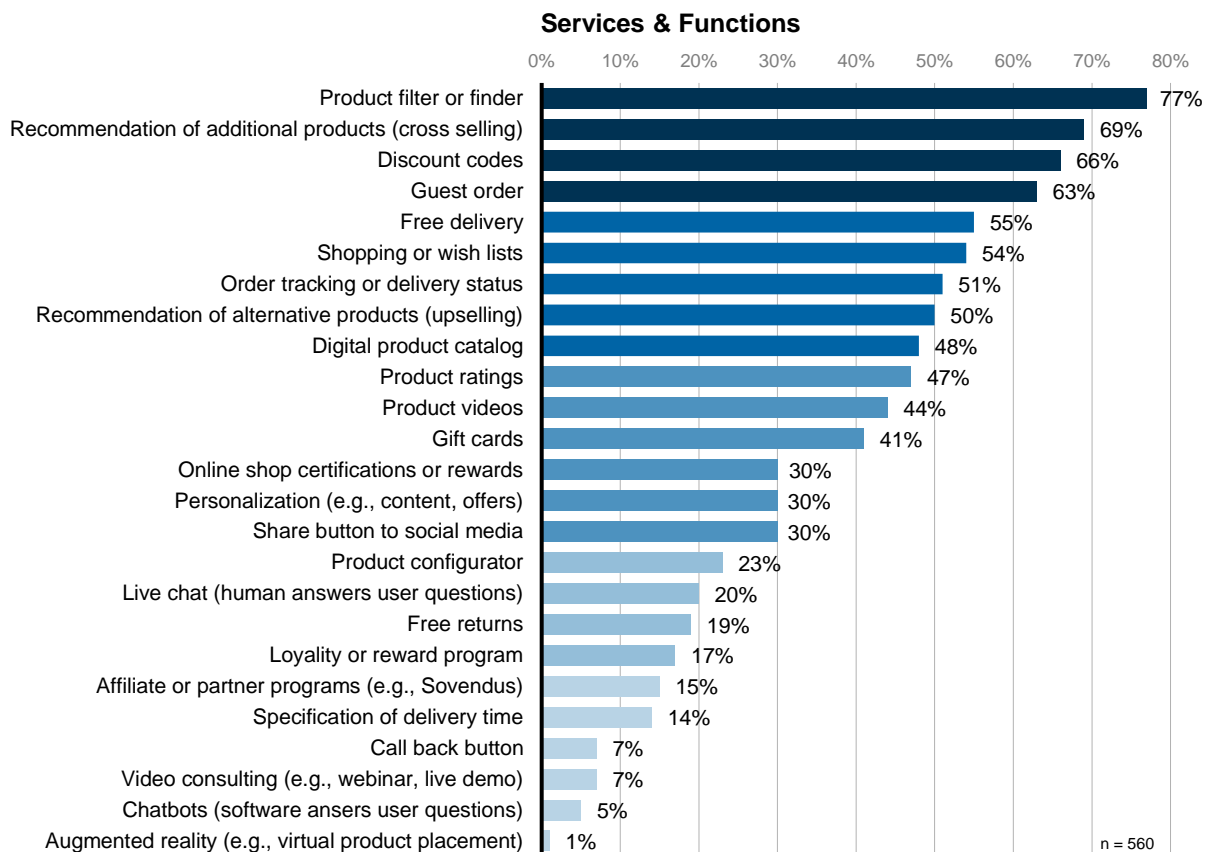
This year, the online retailers were asked once again which digital **services and functions** (features) they offer in their online shops (see Figure 30). The responses show that the online retailers offer a variety of different services and functions. **Product filters** or **product finders** were named most frequently (77%). The comparison with the previous year (see Table 23) illustrates the growing importance of simple, fast and intuitive access to the online offerings. Particularly with a large product range, search and filter systems are key features to allow users to find the right products easily.

Likewise, 54% of the online shops offer their customers **shopping and wish lists** so that they can save the desired products and shop more quickly. Large online shops offer shopping or wish lists more frequently than small online shops (69% vs. 50%; see Table 24).

In second place (69%) is the **recommendation of additional products**. The recommendation of complementary products and services and matching accessories is a basic element of cross-selling to increase the shopping basket value and turnover during a purchase. In this context, the **recommendation of alternative products** (upselling) is offered far less by 50% of the shops. The probability that a customer will find the right product is higher if similar products are also suggested during the product search ("customers who bought this product also bought..."). Small online shops in particular, with smaller selections, recommend alternative products to their users less frequently than large online shops (41% to 71% in Table 24, respectively). Remarkably, successful online retailers recommend alternative products at twice the rate as the unsuccessful ones (57% and 23%, respectively). The use of recommendation systems is on the increase, as the analysis in Table 23 shows.

In third place in Figure 30 are **discount codes**, mentioned by two-thirds of all respondents. Discounts are an effective and popular pricing instrument for the acquisition of new customers, for example with a discount on the first order or upon registering for the newsletter. Discounts are also an effective tool for customer loyalty, for example for repeat orders, loyalty, or anniversary or birthday discounts. Discount codes have been proven to increase the willingness of online shoppers to buy and, consequently, boost the conversion rate, as discussed above.

Figure 30: Which services (functions) does your online shop offer? (Multiple answers possible)



In 2022, **guest ordering** is offered by 63% of online retailers, less than in previous years. Nevertheless, guest ordering has a positive effect in terms of increasing the conversion rate and the number of purchases by customers. However, the increasing risk of fraud and the limited ability to collect customer data are disadvantages.

Like the surveys from 2019 to 2021, **free shipping** is a service offered by the majority of online retailers. Large online shops (offer free shipping more often than small ones (66% and 54%, respectively, see Table 24). Similarly, successful online shops ship for free more often than the unsuccessful ones.

As in the previous year, only 19% consider **free returns** to be an important service. Like free shipping, free returns increase customers' confidence and purchase intentions, and reduce their risk of making a wrong purchase. On the other hand, free returns lead to higher CO<sub>2</sub> emissions (as well as other types of emissions) and higher costs for retailers. More and more fashion retailers with traditionally high return rates, including Zara and H&M, are no longer offering free returns but are instead charging or planning to charge a return fee.











**Order tracking** (the delivery status of an order or a shipment) is a customer need that is taken into account by 51% of online retailers with a corresponding service. With large and successful online shops, it is possible to track one's order more often than with the smaller and less successful ones. In this context, a small proportion (14% of online retailers) offer an individual **selection of the delivery time** or period.

**Product reviews** (possible in 47% of online shops) and a **recommendation function** (share buttons to share the purchase on social media) (30%) are also among relevant functions of an online shop. If an online shop enables product reviews, this demonstrably increases credibility, trust and willingness to buy among consumers on the one hand, and conversion rates for online retailers on the other. The detailed analyses show that the large and successful online shops enable product reviews almost twice as often as the small and unsuccessful ones.

The integration of **product videos** (45%) for better presentation or explanation of products can increase the purchase intention of interested parties. The large online retailers create product videos twice as often as the small ones because they are more likely to be able to afford the costly production (see Table 24).

The **personalization of products** and **product configurators** are further services in e-commerce. Almost one-third of the online retailers surveyed personalize the content or offers in the online shop or customer portal. Personalization is much more common in large online shops (56%) than in the smaller ones. Product configurators, with which prospective customers can individually create and/or customize their product or service, are offered by 23% of respondents.

Table 23: Comparison of services and functions in 2021 and 2022

| #  | Services and functions in 2022         | Mentions in %  | Services and functions in 2021         | Mentions in % |
|----|--|--|--|---------------|
| 1  | Product filter or finder               | 77  | Guest order                            | 65            |
| 2  | Recommendation of additional products  | 70  | Discount codes                         | 64            |
| 3  | Discount codes                         | 67  | Recommendation of additional products  | 63            |
| 4  | Guest order                            | 64  | Product filter or finder               | 63            |
| 5  | Free shipping                          | 56  | Order or wish Lists                    | 54            |
| 6  | Order or wish Lists                    | 55  | Free shipping                          | 53            |
| 7  | Order tracking or delivery status      | 52  | Order tracking or delivery status      | 52            |
| 8  | Recommendation of alternative products | 50  | Recommendation of alternative products | 46            |
| 9  | Digital product catalogues             | 49  | Product reviews                        | 46            |
| 10 | Product reviews                        | 48  | Click and Collect                      | 41            |

Key: Change in service offering in 2022 compared to the previous year:  Increased strongly  Increased slightly  Remained the same  Decreased slightly  Decreased strongly

Seven out of ten online shops specifically rely on product filters and recommendation of additional products to increase sales and the basket value of the online shop.



Table 24: Services (functions) by business relationship, online shop size and success

| Service or function                    | Total<br>(Fig. 29) | Business relationship |                  | Online shop size           |                            | Online shop success     |                          |
|--|--------------------|-----------------------|------------------|----------------------------|----------------------------|-------------------------|--------------------------|
|  |                    | B2B<br>(n = 272)      | B2C<br>(n = 553) | Small (<4 MA)<br>(n = 348) | Large (>21 MA)<br>(n = 77) | Successful<br>(n = 326) | Unsuccessful<br>(n = 49) |
| Product filter or finder               | 77%                | 81%                   | 78%              | 72%                        | 86%                        | 81%                     | 77%                      |
| Recommendation of additional products  | 69%                | 72%                   | 70%              | 65%                        | 84%                        | 73%                     | 51%                      |
| Discount codes                         | 66%                | 64%                   | 69%              | 62%                        | 79%                        | 68%                     | 60%                      |
| Guest order                            | 63%                | 64%                   | 66%              | 60%                        | 73%                        | 63%                     | 53%                      |
| Free shipping                          | 55%                | 60%                   | 56%              | 54%                        | 66%                        | 57%                     | 38%                      |
| Order or wish lists                    | 55%                | 60%                   | 56%              | 50%                        | 69%                        | 60%                     | 40%                      |
| Order tracking or delivery status      | 51%                | 51%                   | 54%              | 45%                        | 66%                        | 59%                     | 38%                      |
| Recommendation of alternative products | 50%                | 52%                   | 51%              | 41%                        | 71%                        | 57%                     | 23%                      |
| Digital product catalog                | 48%                | 55%                   | 46%              | 43%                        | 64%                        | 50%                     | 30%                      |
| Product reviews                        | 47%                | 49%                   | 49%              | 42%                        | 68%                        | 54%                     | 26%                      |
| Product videos                         | 44%                | 48%                   | 44%              | 33%                        | 70%                        | 51%                     | 26%                      |
| Gift cards                             | 41%                | 36%                   | 44%              | 36%                        | 58%                        | 45%                     | 30%                      |
| Shop certifications, seals or rewards  | 30%                | 29%                   | 33%              | 22%                        | 49%                        | 37%                     | 15%                      |
| Personalization (content, offers)      | 30%                | 37%                   | 30%              | 23%                        | 56%                        | 36%                     | 19%                      |
| Share button to social media           | 30%                | 33%                   | 32%              | 28%                        | 34%                        | 31%                     | 26%                      |
| Product configurator                   | 23%                | 27%                   | 22%              | 16%                        | 36%                        | 29%                     | 13%                      |

Surprisingly often (41% of all online retailers and 58% of the large ones in Table 24), **gift cards** can be sent with an order. One in three online shops (and one in two of the larger ones) in the study have **certifications**, seals or awards and display them on the website. Certificates (such as Trusted Shops), labels (e.g., from consumer protection or testing organizations) and seals of approval (e.g., from trade associations) increase the trust and willingness to buy of internet users, which is also reflected in more purchases and conversion rates in the online shop.

**Live chat**, where employees answer customers' questions and concerns, is offered by one in four online shops. In e-commerce, use of **chatbots** and **loyalty programs** is stagnating or even declining. Chatbots are used by only 5%, and loyalty programs to increase sales are provided by 17% of respondents.

**Affiliate and partner programs** such as Sovendus are particularly suitable for acquiring new customers. However, only 15% of online retailers use affiliate or partner programs to increase sales. **Video consulting** and **call back buttons** are each used by 7% of retailers, which represents a slight decline in importance. Possible reasons for this can be seen in the lifting of the coronavirus measures, which has made on-site services possible again.

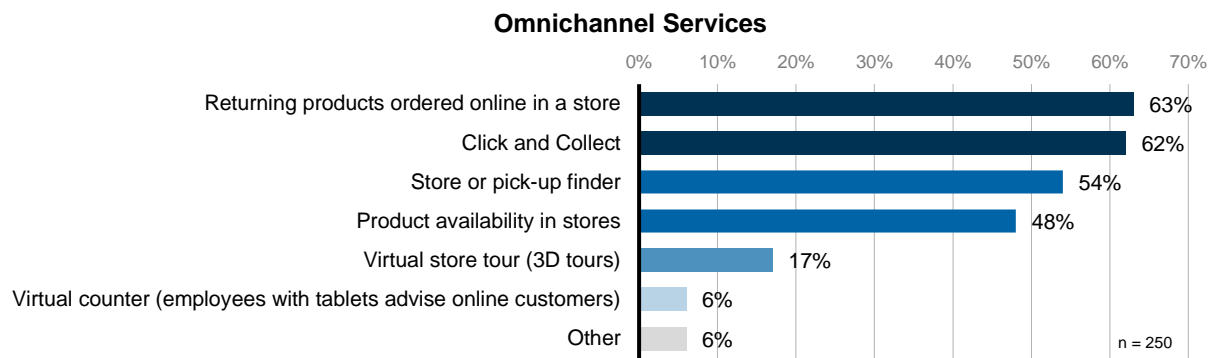
**Augmented reality** (AR), such as an app for virtual product placement or configuration, is still very rarely used in e-commerce, mentioned by only 1% of respondents.

## 6.4 OMNICHANNEL SERVICES

Omnichannel retailers in Switzerland and Austria have been offering their customers more and more different services in recent years. The aim of the omnichannel concept is to provide customers with flexibility in the purchasing process to increase customer satisfaction and, as a result, to increase the conversion rate.

The most frequently offered omnichannel services by omnichannel retailers include the **return of products ordered online** and **click and collect**, with 63% and 62% respectively (see Figure 31).

Figure 31: What omnichannel services does your online shop offer? (Multiple answers possible)



The return of products ordered online in physical stores and click and collect are the top omnichannel services.



A **shop or pick-up finder** is considered another important omnichannel service by more than half of the retailers. As already made clear in the previous chapter, the selection of products is a key success factor. In the context of omnichannel services, **product availability** in physical shops is also a popular omnichannel service, offered by 48% of respondents.

Digital services such as **virtual store tours** (17%) and the **virtual shop counter**, where employees with tablets advise online customers (6%), are still comparatively rare offerings in omnichannel management.



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## 7. Payment in E-Commerce

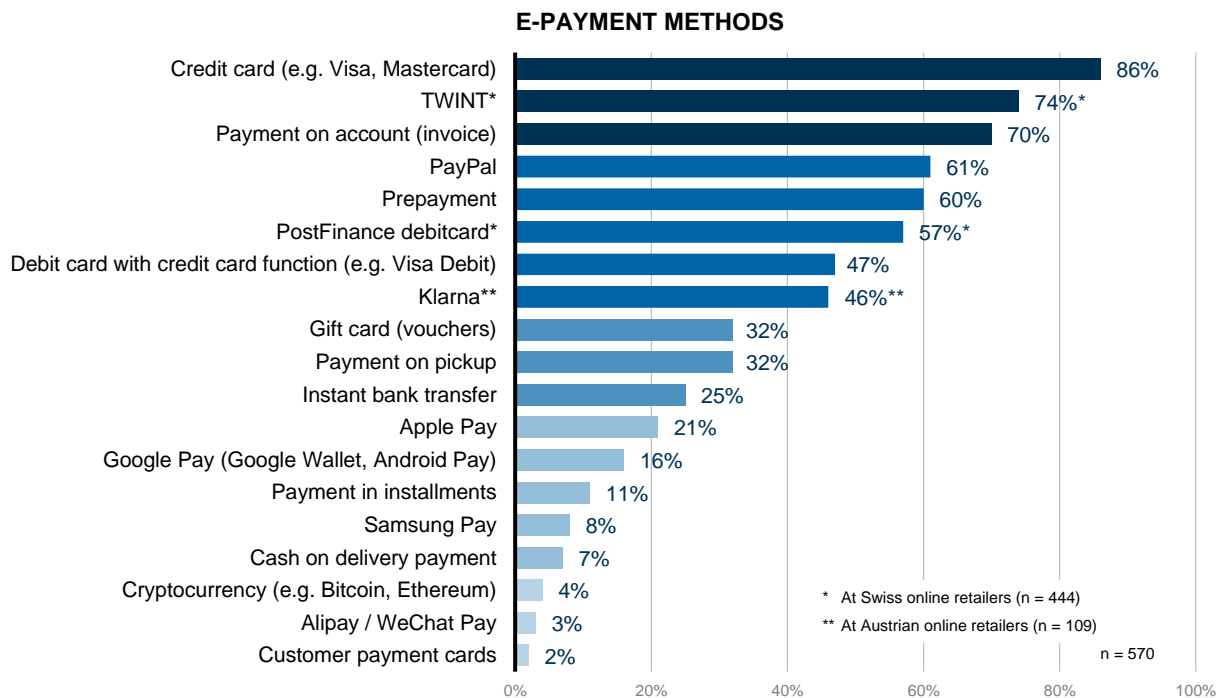
This chapter discusses the current developments on the topic of payment in online shops. Payment on account and by credit card remain the standard payment methods, but mobile payment methods are gaining massive market shares. TWINT became the second biggest payment method in Switzerland in 2022, both in terms of use and share of turnover among online retailers.

### 7.1 PAYMENT METHODS IN E-COMMERCE

One question area of the study was dedicated to payment in the online shops and shows that **credit cards and purchase on account** (invoice) remain the standard means of payment: 86% of respondents allow payment to be made with credit cards such as Mastercard, Visa or American Express, and 70% offer payment by invoice (payment on account; see Figure 32). Among international online merchants, the provider **PayPal** is used very often: 61% of the online merchants in the survey offer this electronic payment solution, with more in Austria than in Switzerland (79% vs. 57%; see Table 25). Three out of five online merchants also offer **prepayment**, although this is rarely used by customers. The Swiss mobile payment provider **TWINT** was able to gain further market share among both customers and online merchants in 2022 and is already the second most frequently used payment method (offered by 74% of online retailers). Nonetheless, in the face of TWINT's rise, the **PostFinance debit card** (57%) and the **debit cards** with credit card function (47%) appear to have been able to hold their market position.

At one in three omnichannel retailers, you can order in the online shop and then pay when you **pick up your order in the store** or at the pick-up. A relatively large number (32%) offer **gift cards or vouchers** that can be redeemed in the online shop. **Instant bank transfer** is offered by one out of four online retailers, but it is rarely used by customers.


Figure 32: Which means of payment (payment method) does your online shop offer? (Multiple answers possible)



Mobile payment providers like TWINT and Klarna are gaining massive market share and importance among merchants.



Table 25: The 10 most frequently offered payment methods of online retailers by market, online shop size and success

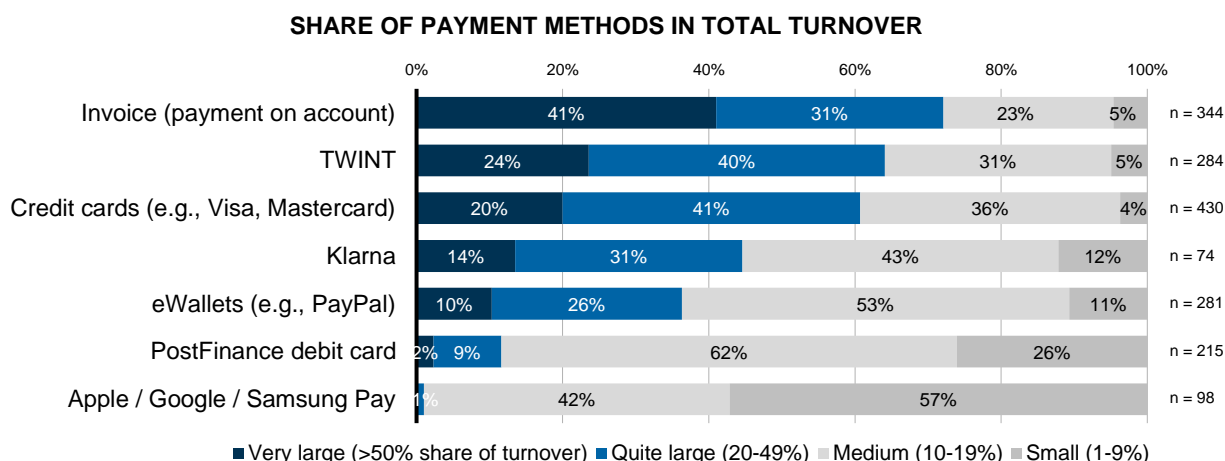
| Payment method                       | Total<br>(n = 570) | Market  |                      | Online shop size           |                            | Online shop success     |                          |
|--------------------------------------|--------------------|--|----------------------|----------------------------|----------------------------|-------------------------|--------------------------|
|                                      |                    | Switzerland<br>(n = 444)   | Austria<br>(n = 109) | Small (<4 MA)<br>(n = 348) | Large (>21 MA)<br>(n = 77) | Successful<br>(n = 326) | Unsuccessful<br>(n = 49) |
| Credit card (e.g., Visa, Mastercard) | 86%                | 87%  | 84%                  | 86%                        | 88%                        | 87%                     | 87%                      |
| Invoice (payment on account)         | 70%                | 70%  | 66%                  | 62%                        | 87%                        | 76%                     | 53%                      |
| PayPal                               | 61%                | 57%  | 79%                  | 62%                        | 66%                        | 61%                     | 49%                      |
| Prepayment                           | 60%                | 61%  | 50%                  | 64%                        | 53%                        | 63%                     | 43%                      |
| TWINT (Switzerland)                  | 58%                | 74%  | -                    | 76%                        | 75%                        | 89%                     | 74%                      |
| Debit card with credit card function | 47%                | 46%  | 49%                  | 48%                        | 52%                        | 48%                     | 40%                      |
| PostFinance debit card (Switzerland) | 45%                | 57%  | -                    | 58%                        | 62%                        | 67%                     | 59%                      |
| Gift card (vouchers)                 | 32%                | 31%  | 35%                  | 24%                        | 57%                        | 35%                     | 28%                      |
| Payment on pick-up / collection      | 32%                | 31%  | 38%                  | 35%                        | 23%                        | 33%                     | 30%                      |
| Klarna                               | 15%                | 6%   | 46%                  | 11%                        | 31%                        | 15%                     | 9%                       |

Large and successful online merchants offer more payment methods than small and unsuccessful ones.

The m-payment methods **Apple Pay** (21%), **Klarna** (total 15% and in Austria 46%), **Google Pay** (16%), **Samsung Pay** (8%) and **Alipay and Wechat Pay** (3%) are offered by online merchants much more frequently than in the previous year and can be considered the winners among the payment methods (see Figure 31). Their above-average growth among merchants also illustrates the increasing importance of mobile payment methods to customers. A further 11% offer **payment by instalments**, 7% payment by cash on delivery and 2% payment by **customer card**. Surprisingly, **cryptocurrencies** also increased their low importance as a payment method slightly, to 4%.

The largest **share of payment methods in the total turnover** of online shops is made up of payment on account, TWINT (in Switzerland) and credit cards such as Visa or Mastercard (cf. Figure 32). **Payment on account** accounts for more than 50% of the share of turnover at 41% of online retailers. At 24% of Swiss online merchants, the largest share of sales is paid using **TWINT**. These figures underpin the meteoric rise of the Swiss mobile payment provider in recent years. **Credit card** payments account for a very large share of sales at 20%. In 45% of shops, **Klarna** accounts for a quite large or very large share of total sales, and for **eWallets** such as PayPal, the figure is 36%. PostFinance debit cards and the offers from Apple, Google and Samsung account for a smaller share of sales.

Figure 33: How high is the share of the following payment methods in the total turnover of the online shop?



Payment by invoice, TWINT and credit cards account for the largest share of total online shop turnover among Swiss online retailers.



## 7.2 TWINT

Swiss online shop operators that do offer **TWINT as a payment method** in the online shop but are not active in B2B were asked about the advantages and disadvantages of this payment method.

As Figure 34 shows, 74% of Swiss online shops offer TWINT as a payment option to their end customers. The remaining 26 % who do not use TWINT were asked in a follow-up question **why** they do not offer payment with TWINT (see Figure 35).

Figure 34: Use of TWINT as a payment method in Swiss online shops

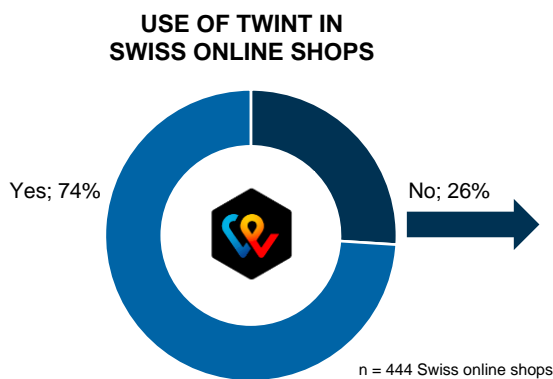
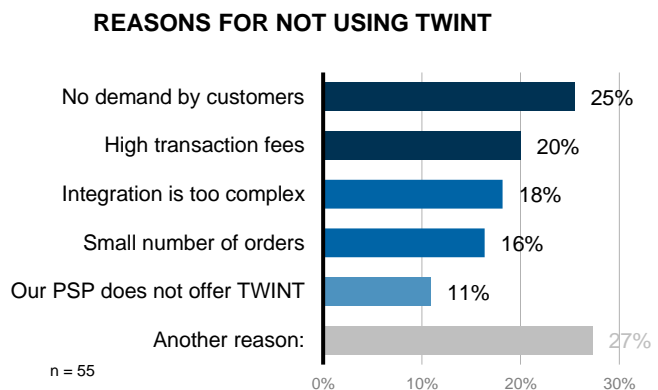


Figure 35: Why do you not offer payment with TWINT?



For 26% of these retailers, they do not support TWINT as a payment method because there is **no demand from customers**. A further 20% find the **transaction fees** too high. For 18% the **complex integration** to the online shop makes TWINT undesirable, and for 16% the number of orders is too low. Finally, 11% stated that their PSP does not offer TWINT. In the open text field, seven stated that they were planning to expand the range of payment methods and introduce TWINT. One online shop operator wrote that they have a lot of international orders, and TWINT is therefore not suitable. Another participant wrote that TWINT did not accept them as a customer.

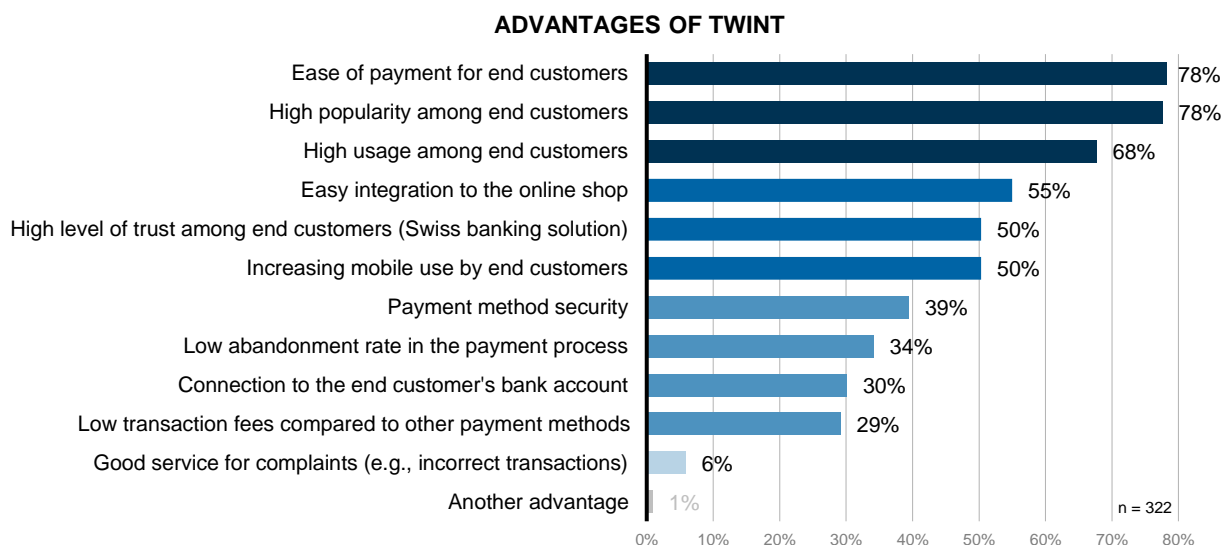
The 58% of Swiss online merchants who offer TWINT in their online shops see the **advantages** above all from the end customer's point of view (see Figure 36): 78% of them agree that the **simplicity of payment** and the **great popularity** among end customers are the biggest advantages of TWINT. One-third also mentioned the **high penetration** among end customers as a major advantage of TWINT.

Other advantages for online shop operators from the end customer's point of view are the high level of **trust** in TWINT and the increasing **use of mobile phones** by consumers. From the provider's point of view, one out of two participants find that the **simple connection** to the online shop (55%) is an advantage. More than a third (39%) see an advantage in the **security** of the payment method.

In addition, for one-third the **low dropout rate in the payment process** is an advantage of TWINT. Nearly one out of three online shop operators (29%) see an advantage in the linking of TWINT with a Swiss bank account of the end customer, as well as the low transaction fees. The least frequently mentioned advantage, at 6%, was the good **service** in the case of complaints (e.g., incorrect bookings). Other advantages mentioned by individual merchants were the rapid payment to online shop operators, the speed, and the modernity of TWINT as a payment method.



Figure 36: What do you think are the advantages of TWINT? (Multiple answers possible)



From the merchant's point of view, the simplicity of payment by smartphone and the high popularity and usage among end customers are the major advantages of TWINT.



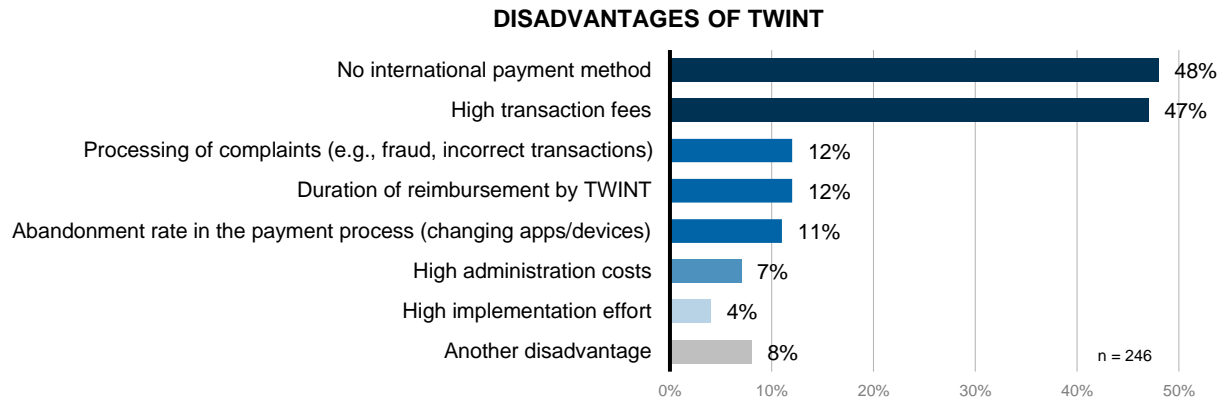
Existing TWINT customers see the fact that TWINT is not an international means of payment as a disadvantage (see Figure 37). In addition, almost half also stated that the high transaction fees are a disadvantage of TWINT. For at least 12 %, the processing of complaints (e.g., fraud, incorrect bookings) and the length of time it takes for TWINT to issue refunds represent a disadvantage. Another 11% stated that the high abort rate in the payment process, for example triggered by an app or device change, is a disadvantage.

A few online merchants see high administration costs and high implementation effort as disadvantages (7% and 4%, respectively). Under "other disadvantages", technical problems, TWINT support, the billing overview and the duration of the payment process were mentioned.





Figure 37: What are the disadvantages of TWINT from your point of view?



### 7.3 PAYMENT SERVICE PROVIDERS

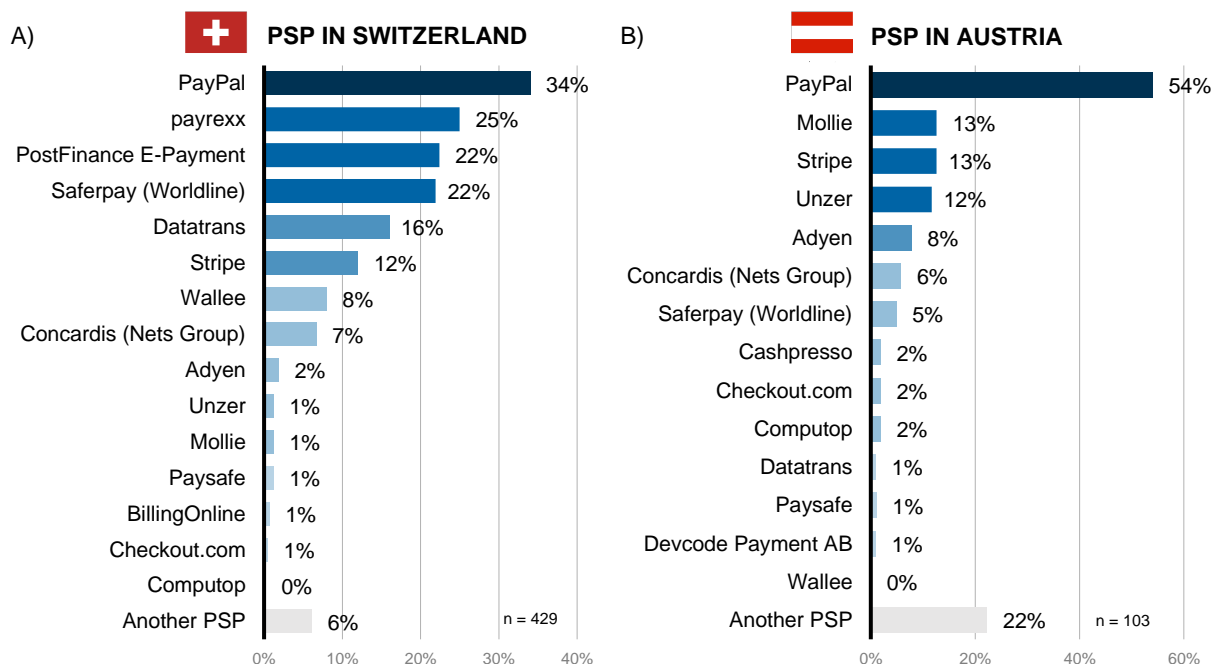
The 550 online shop operators were asked which payment service provider (PSP) they work with to process the transactions in the online shop. Figure 38 clearly shows that **PayPal** is the leading e-payment provider, with 34% in Switzerland and 54% in Austria, especially among small and medium-sized online shops. In second place in Switzerland is **Payrex** with 25% of respondents, followed by **PostFinance E-Payment** at 22%.

**Saferpay from Worldline** is among the top four in Switzerland, used by 22% of respondents; in Austria, its share is significantly lower (with 5%). The payment provider **Datatrans** was mentioned by 16% of online merchants in Switzerland, in Austria by only 1%.

**Mollie** is mentioned more often as a PSP by Austrians (13%) than in Switzerland (1%). **Stripe** handles payment processing for a good 12% of the online merchants surveyed in Switzerland and 13% in Austria. **Unzer** handles payments for 12% of merchants in Austria and 1% in Switzerland.

**Wallee** was mentioned, but only by 8% of Swiss online merchants and none from Austria. In this survey, **Adyen** is more strongly represented in Austria (8%) than in Switzerland (2%). **Concardis (Nets Group)** serves 7% of the respondents in Switzerland and 6% in Austria. Paysafe, Checkout.com, Computop and BillingOnline were also named (1% or 2% each). The remaining few online merchants (6% in Switzerland and 22% in Austria) use another PSP provider.

Figure 38: Which payment service providers (PSP) do you work with? (Multiple answers possible)



PayPal, payrexx, PostFinance, Saferpay from Worldline, and Datatrans are the five leading e-commerce payment service providers in Switzerland.



## 7.4 BUY NOW, PAY LATER SOLUTIONS

The online retailers were further asked whether they have a “buy now, pay later” (BNPL) solution in place, allowing their customers to pay for purchases later (see Figure 39). Nearly one in five (17%) said that they offer such a solution to their customers, while 77% stated that they do not have such a solution in their online shop and 6% did not answer.

Figure 39: Do you have a “buy now, pay later” (BNPL) solution where your customers can pay later?

### BUY NOW, PAY LATER SOLUTIONS

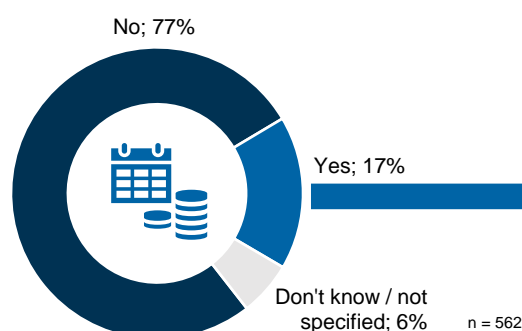
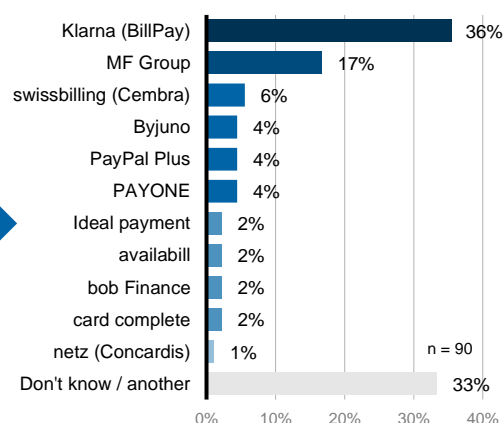


Figure 40: Which “buy now, pay later” providers do you work with? (Multiple answers possible)

### BUY NOW, PAY LATER SUPPLIER



Over one-third of the online shops that offer BNPL solutions work with **Klarna (BillPay)**, followed by the **MF Group** (17%; see Figure 40). Other providers are swissbilling (Cembra; 6%), followed by Byjuno, PayPal Plus, PAYONE (4% each), as well as Ideal payment, availabill, bob Finance and card complete (2% each). Netz (Concardis) is used by 1%. Under “Don't know / other”, invoice, POWERPAY, Wallee and Heidipay received occasional mention.

Two-thirds of online retailers who offer “buy now, pay later” see advantages primarily in the acquisition of **additional customers** and an offer as an **additional means of payment** (see Figure 41). Further advantages are a higher conversion rate (39%), higher loyalty of existing customers (15%) and the constant availability of this payment method (13%). Lower payment fees (9%) and higher margins (3%) are seen as advantages by only a few. In the open text field under other advantages, a higher basket value was mentioned and that such solutions create trust among new customers. Those online shop operators who do not have a “buy now, pay later” solution in place were asked whether an integration of this solution would be interesting for them. Of these, only 8% stated that this would be interesting for their online shop (see Figure 42). For almost one in four shops, it could **perhaps be interesting** because it might bring additional customers and **additional turnover** (see Figure 43A). Another reason cited by 16% is that a BNPL solution increases **customer loyalty**. However, nearly two-thirds remain uninterested in a “buy now, pay later” solution.

The two-thirds of online retailers who are **not interested in a “buy now, pay later” solution** argue that it does not bring them any additional customers and does not increase customer loyalty (see Figure 43B). Other retailers stated that BNPL solutions do not bring additional sales (31%) or that offering such a solution is too expensive (18%). Under “other reasons”, many individual text responses were given.

Figure 41: Where do you see the advantages of "buy now, pay later" solutions? (Multiple answers possible)

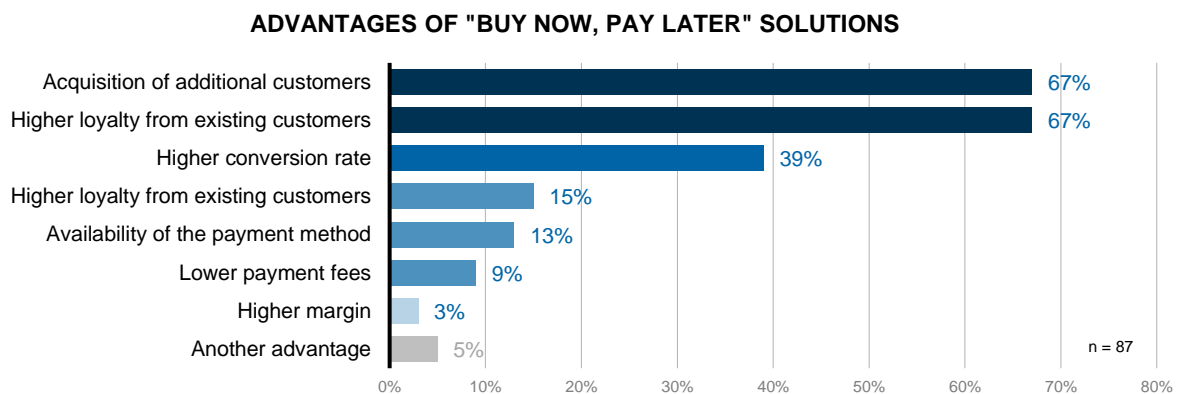
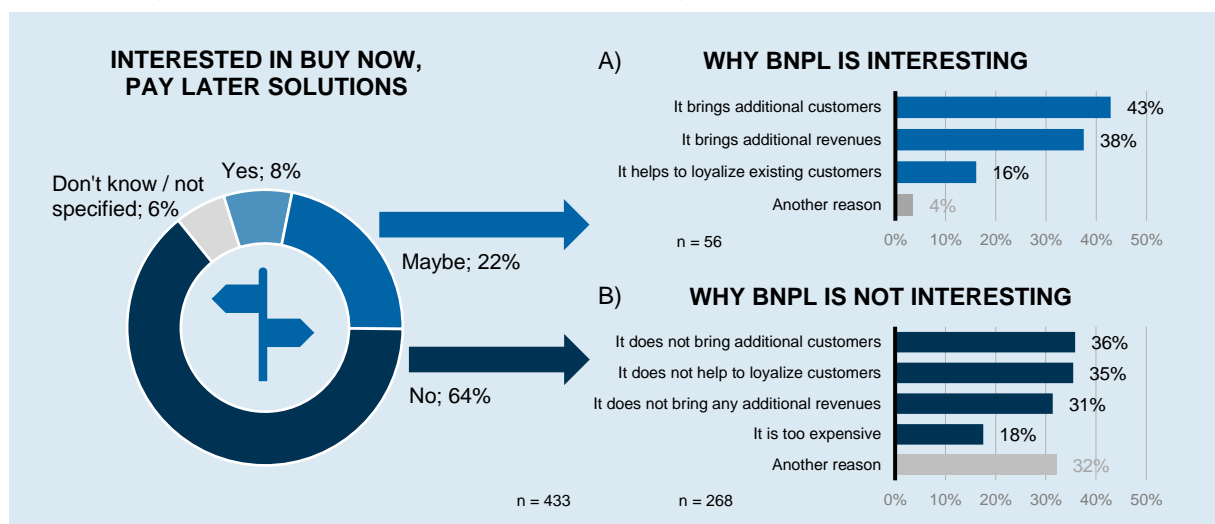


Figure 42: Is the integration of a "buy now, pay later" (BNPL) solution interesting for you?



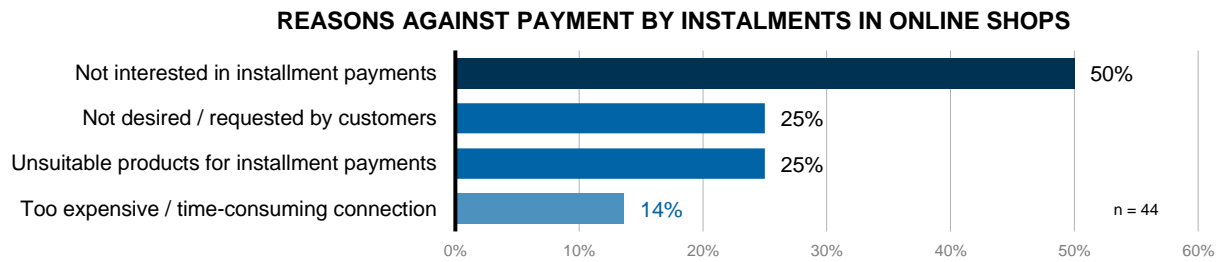
For B2B merchants, BNPL solutions are not very attractive, as the majority of payments are made via invoice. More than 16 online merchants wrote that they do not want to promote or support the **indebtedness of customers** through such solutions and that this is to some degree against the company values. Furthermore, a few individual responses stated that such solutions increase internal costs, that liquidity is affected, that customer creditworthiness decreases or that the shopping basket values are too low for "buy now, pay later".

## 7.5 PAYMENT BY INSTALMENTS

The final question investigated in this study concerned the reasons for not paying by instalments in online shops. Those participants who did not select "payment by instalments" as a means of payment and who reported order basket values of greater than 501 Swiss francs or Euros (see Chapter 7.1 and Figure 44) were asked why not. The responses showed that half are **generally not interested in payment by instalments** in the online shop, and one in four stated that this is not desired or requested by the customers; a further one in four stated that the products offered are unsuitable for payment by instalments. Finally, 14% gave as a reason for not offering payment by instalment that the connection to the online shop would be too expensive or complicated.

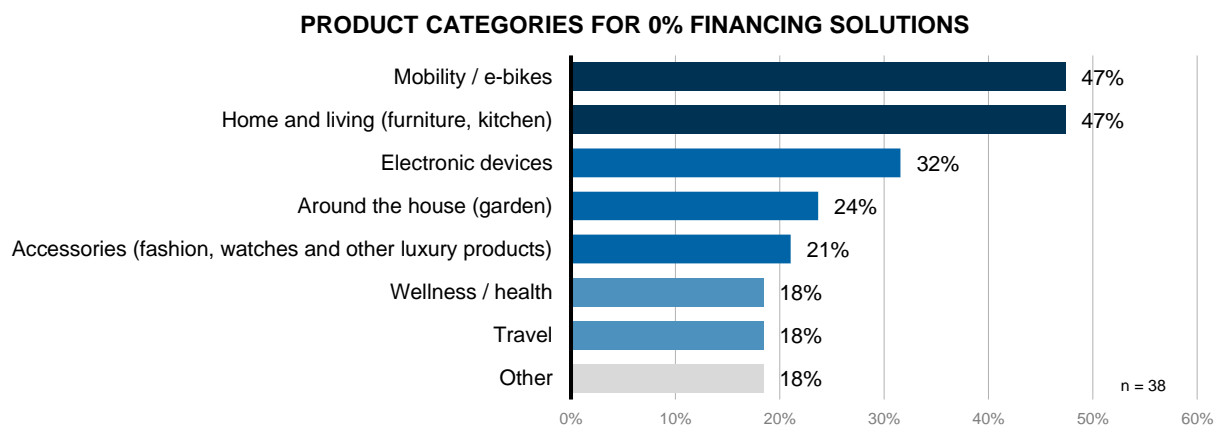
Another question explored **0% financing solutions** in more depth and for which product ranges (product categories) such a solution could be interesting. This question was shown to all participants who reported an average basket value greater than 501 Swiss francs or euros. This showed that **mobility, e-bikes** and **home and living** (e.g., furniture, kitchens) are the most interesting product categories for 0% financing solutions, each being mentioned by 47% of respondents (see Figure 45).

Figure 44: Why do you not offer payment by instalments in your online shop? (Multiple answers possible)



Also interesting for 0% financing solutions can be **electronic items** (32%) and everything around the **house and garden** (24%). It is rather surprising that accessories such as fashion, watches and other luxury products were only mentioned by 21%. With only 18% each, the categories wellness, health and travel are rather less interesting for 0% financing solutions.

Figure 45: For which product ranges (product categories) could a 0% financing solution be interesting? (Multiple answers possible)



# Buy now, pay later

With 0% financing  
from **bob Finance**

Find all offers on:  
**bobzero.ch**

## 8. Conclusion

### 8.1 CONCLUDING REMARKS

The aim of this study was to examine the developments of online commerce in Switzerland and Austria since the lifting of the coronavirus measures. The survey of 625 online shop operators created a foundation of quantitative data that provides information about the current situation in the e-commerce market. The study comprehensively shows how retailers have fared in business terms since the coronavirus measures were lifted. Furthermore, it surveys the success factors in e-commerce for the first time and provides insights into social media advertising, influencer marketing, and A/B and multivariate testing. In addition, the return rate, the shopping basket value and the conversion rate, as well as the services offered, were analyzed in more detail according to product groups. The study includes a representative inventory in the following areas, which we summarize below: success factors, key figures in e-commerce, digital marketplaces, marketing, and online shop and conversion systems and payment.

**Success factors:** The survey on the most important USP (Unique Selling Propositions) for companies active in e-commerce showed that the quality of products and services is one of the most important success factors for three out of four online retailers. A good half of online retailers see exclusivity of products and services as well as brand (brand awareness and brand strength) as important success factors. Same-day deliveries and data-based services are mentioned only occasionally as success factors. In addition, participants were asked how successful they would rate their own online shops, and more than half of the 568 online retailers surveyed rated their own online shop as successful. Moreover, more successful online shops offer a wider range of high-quality products and are more customer-oriented and user-friendly (see Chapter 2.4).

**Key figures:** This study collected key figures relevant to e-commerce such as return rate, average basket (or order) value and conversion rate, and found that a third of the online shops have a very low **return rate** of less than 1%. A closer analysis showed that the categories cosmetics, food and toys often have a return rate below 4%, and clothes and sporting goods are known to have high return rates, from 20% to over 50%. A third of all **shopping baskets** in Switzerland have a value of 101 to 200 Swiss francs, and in Austria a third have a value of between 50 and 100 euros. The categories travel, clothing and sporting goods often have a medium basket value of 101 to 500 Swiss francs, and computers, furniture and electronics are more likely to have a high basket value of over 500 Swiss francs. The time comparison of the **conversion rates** showed that they are somewhat lower in 2022 than in 2018 (see Figure 18); this can be explained in part by the increasing number of online offers, online shops, non-sales-relevant traffic, transparency, and competitive intensity in e-commerce, and in part by the composition of the samples in the two studies.

**Digital marketplaces:** Digital marketplaces and platforms have grown strongly in recent years. In 2022, 60% of the online retailers surveyed are present on them and use them as an additional sales channel. This is 20% more than last year and even two-thirds more than in 2019. Digital marketplaces such as Digitec Galaxus, Amazon, or eBay have become the second biggest digital sales channel, behind the corporate online shop. In Switzerland, Ricardo and Tutti also have a strong market presence. Since the coronavirus crisis, the diversity and economic relevance of digital marketplaces has further increased.

**Services:** This year's study systematically questioned the services and functions offered by online retailers. More than three-quarters named product filters or product finders, followed by product recommendations (for cross-selling and upselling) and discount codes. Video advising and call-back buttons show a slight decline in importance, as do chatbots and loyalty programs. Among the omnichannel services, returns of products ordered online in the shop and "click and collect" are among the top two. A virtual shop counter is offered by only 6% of respondents.

**Marketing instruments and social commerce:** This year, the marketing instruments of online shops were surveyed again, and the results reiterate that a successful online shop cannot do without search engine, newsletter and social media marketing. Television and radio advertising, which smaller retailers in particular cannot afford, are being used less and less frequently. Social commerce via **Facebook Shops** and **Instagram Shops** gained further



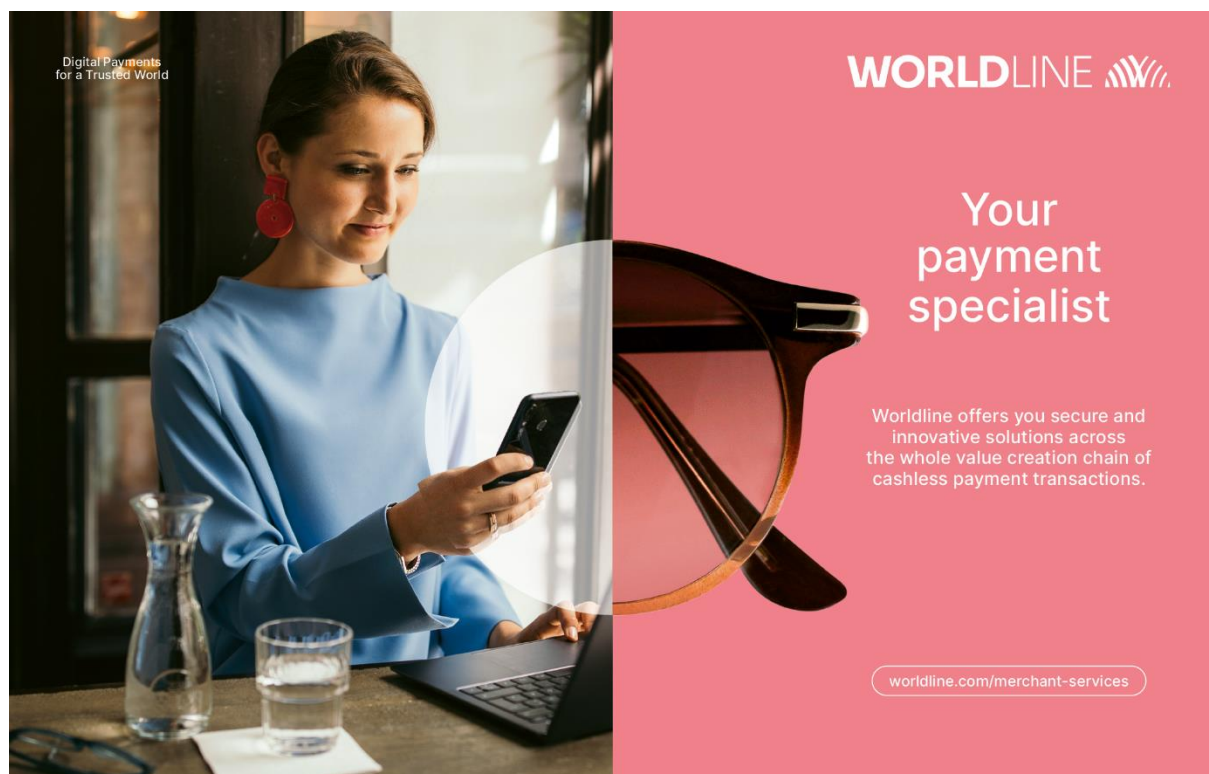
importance in this year. For advertising purposes, online retailers use Facebook (94%) and Instagram (86%) most frequently in social media advertising, followed by YouTube (41%) and LinkedIn (39%). The results show that omnichannel retailers are more likely to advertise online than pure players, and large online shops are more likely to advertise on social media than smaller ones.

**Testing and influencers:** The majority of the shops surveyed do not work with influencers, and only one in four work moderately to very successfully with influencers. Another 13% are planning to start doing so. One in five online shops already work successfully with influencers, creators or testimonials. For the first time, the survey also asked about the areas in which the companies carry out testing. Just 15%, mostly larger shops, conduct A/B or multivariate tests and use them to optimize their advertising materials, call-to-actions, product pages, layout and/or the order process of the online shop (see Chapter 5.4).

**Online shop and information systems:** The study shows that large and successful online shops have significantly more information systems for newsletters, testing, marketing automation and credit checks integrated in their shop. Digital analytics, newsletter and campaign tools, and content management systems (CMS) are the top three integrated information systems. The majority of retailers use WooCommerce/Wordpress, Shopware and Magento or have developed their own. The diverse range of software solutions shows that the market for online shop systems is still very dynamic, competitive and complex.

**Payment in e-commerce:** E-payment remains a dynamic aspect of e-commerce. The study shows that mobile payment providers such as **TWINT** and **Klarna** are massively gaining market share and importance among merchants. Other mobile payment methods such as Apple Pay, Google Pay, Samsung Pay, Alipay and Wechat Pay are offered more frequently than in the previous year. In addition, cryptocurrencies also gained slightly in importance as a payment method. Invoice and credit card payments and, in Switzerland, TWINT continue to account for more than 50% of total sales (see Chapter 7).

A key **conclusion** of the study is that e-commerce growth is at a lower level than during the coronavirus crisis in 2021 and 2022, but higher than in 2019. Developments remain dynamic in a challenging market, and online retailers should continue to monitor and anticipate changes. The authors see ensuring the quality and exclusivity of the products and services offered as well as being open to examining and testing new ideas and concepts.



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## 8.2 RECOMMENDATIONS FOR ONLINE RETAILERS

The following nine recommended actions for online shop operators can be derived from the results of the Online Retailer Survey 2022 (readers are invited to compare these recommendations with the checklist of 36 concrete measures in Table 26).

1. **Management:** The exclusivity and quality of products and services, a strong and valuable brand, and high customer orientation are important success factors in e-commerce and should be considered in the management and strategy. Of the internal key figures already used, the industry key figures obtained in this study can be taken as a reference and business, marketing, and communication strategies can be derived from them. In addition, due to the importance of sustainability of products and companies, it is advisable to examine new, circular business models and services that can best be integrated into the existing business. Furthermore, short decision-making processes for the introduction and expansion of, for example, new systems, services, products, and services support a more flexible response to market events and new ideas can be implemented efficiently in terms of time.
2. **Sales:** It is still true this year that those who support their business broadly through various offline and online distribution or sales channels and manage several sales channels (physical, digital, or a combination of both) reduce the risks and dependence on individual channels. Among the digital sales channels, the focus should be on the retailer's own online shop, digital marketplaces, digital platforms and apps. Social commerce opportunities – especially Facebook Shops and Instagram Shops – should also be evaluated.
3. **Online shop:** The systems, contents and processes of the online shop should be constantly developed and adapted to customer needs. It is also advisable to observe the developments and offers of software solutions with all their functionalities and possibilities on the market and to check technical, organizational or personnel dependencies.
4. **Services:** For services, retailers should ensure that basic functionalities such as product filter, search, and finder function smoothly. In addition, further services, such as recommendations of additional and supplementary products, discount codes, and guest orders, can be evaluated and introduced if they do not already exist (see Figure 29). A focus on a high level of customer orientation and the practice of satisfactory customer management throughout the entire customer life cycle are also strongly advisable.
5. **Information technology (IT):** Due to constantly changing user behavior and needs, flexible and expandable online shop and payment systems should be in use and seamlessly integrated with the relevant information systems such as digital analytics, ERP, CRM, CMS, PIM, credit check, and warehouse systems. Small online retailers in particular often have some catching up to do here and need to take action. In addition, systems for A/B and multivariate testing as well as marketing automation should be tested, implemented, and further developed.
6. **Marketing:** In marketing, professional search engine marketing (SEO/SEA) and social media advertising should continue to be maintained. In addition, it is advisable to conduct more A/B and multivariate tests on the homepage, landing pages, product pages, and in the ordering process of the online shop to make marketing actions more efficient and to optimize the conversion rate. This could be used, for example, in the areas of advertising materials, call to actions, keywords, wording, or layouting. Based on the results of the study, one in five shops are working successfully with influencers, creators or testimonials. Here, too, it is advisable to check and test their use. The brand is also seen as an important success factor, which is why it is advisable to focus on maintaining or expanding brand awareness.
7. **Organization and employees:** It is advisable to retrain existing staff for the digital business and to provide ongoing training, which also promotes competitiveness in the long term. The training of apprentices and the creation of new apprenticeships or even job profiles in e-commerce should also be promoted. Furthermore, it is advisable to examine and test flexible working models and to have the needs of the employees and the company evaluated at regular intervals.

8. **Warehouse:** Flexibility should always be the focus of warehouse procurement and staff deployment to be able to react efficiently to market-related changes in incoming and outgoing goods. In addition, it is advisable to retain specialized and multi-functionally trained employees and to pay attention to careful handling as well as to anticipate and reduce return rates.
9. **Logistics:** Logistics capacities should continue to be optimized and logistics processes adapted to anticipate the needs for deploying flexible personnel. In addition, direct dispatch from production (D2C) or from the warehouse of physical branches or third parties (in drop shipping) can offer advantages. It is also advisable to keep packaging and shipping materials to a minimum in order to avoid unnecessary waste and work steps, among other things.

### 8.3 CHECKLIST: MANAGEMENT OF ONLINE BUSINESSES

The following checklist (Table 26) shows what online retailers should pay attention to so in order to keep their business well-positioned. These **36 recommendations for action** were derived on the basis of the study results from 2021 and 2022 for the practice of online retailing and are not to be regarded as conclusive.

The authors wish online retailers every success in the implementation of their measures and in the further development of their online business. The authors would be very pleased to receive **feedback, additions and criticism** on the present research results. The authors are also happy to answer questions and are open to input for the Online Retailer Survey 2023.



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risk management**

**Your partner for  
purchase on account**

**Identification  
Age verification  
Credit rating  
Fraud prevention  
Risk management  
Payment**



Table 26: Checklist: How to set up your online business optimally

| Topic                                     | Recommendations   |
|---|---|
| <b>Management</b>                         | <ol style="list-style-type: none"> <li>1. Ensure high quality and exclusivity of <b>products and services</b></li> <li>2. Guarantee a high level of <b>customer orientation</b> (digital/personal proximity to customers)</li> <li>3. Derive sales, marketing and communication strategies based on internal <b>key performance indicators</b> (KPIs) and external benchmarks</li> <li>4. Regularly test <b>new business models and service</b></li> <li>5. Ensure short <b>decision-making processes</b> for the introduction and expansion of new systems, services, products, and services</li> <li>6. Closely monitor and anticipate current and future <b>market developments</b></li> </ol> |
| <b>Sales &amp; distribution</b>           | <ol style="list-style-type: none"> <li>7. Further develop <b>digital sales channels</b> (corporate online shop, digital marketplaces and platforms, social commerce, and native apps) broadly</li> <li>8. Further expand the <b>online range</b> in breadth and depth</li> <li>9. Develop and coordinate <b>omnichannel services</b></li> </ol>   |
| <b>Online shop</b>                        | <ol style="list-style-type: none"> <li>10. Observe the developments and offers of <b>software solutions</b> on the market and check dependencies</li> <li>11. Select and operate a flexible and expandable <b>online shop system</b></li> <li>12. Constantly be developing your corporate <b>online shop</b> (systems, content, and processes)</li> </ol>   |
| <b>Services</b>                           | <ol style="list-style-type: none"> <li>13. Ensure basics like <b>product search</b>, filter and finder are working smoothly</li> <li>14. Exploit the potential of <b>recommendation systems</b> for cross-selling and upselling</li> <li>15. Evaluate and introduce <b>customer-oriented services</b> based on Figure 30</li> </ol>   |
| <b>IT</b>                                 | <ol style="list-style-type: none"> <li>16. Ensure scalable <b>IT systems</b> and high performance</li> <li>17. Integrate <b>CMS, PIM, CRM, and ERP systems</b> into the online shop system</li> <li>18. Introduce a <b>marketing automation</b> system and implement concrete use cases</li> <li>19. Offer <b>mobile payment solutions</b> such as TWINT or Klarna</li> <li>20. Introduce a system for <b>A/B and multivariate tests</b> to constantly improve the usability of the online shop, user experience and the conversion rate</li> </ol>   |
| <b>Marketing</b>                          | <ol style="list-style-type: none"> <li>21. Carry out A/B or multivariate <b>tests</b> on advertising media, call to actions, keywords, product pages, layout, and in the ordering process</li> <li>22. Constantly evaluate and continuously expand the digital and conventional <b>marketing mix</b></li> <li>23. Conduct professional <b>search engine marketing</b> and <b>social media advertising</b></li> <li>24. Work with <b>influencers</b>, creators, and testimonials and test their impact</li> <li>25. Build or maintain a high level of <b>brand awareness</b> and brand value</li> </ol>  |
| <b>Organization &amp; human resources</b> | <ol style="list-style-type: none"> <li>26. Train <b>apprentices</b> in the professional fields of e-commerce and digital marketing</li> <li>27. Constantly drive forward the <b>specialization</b> of employees</li> <li>28. Continue and expand the promotion and <b>further education</b> of your personnel</li> </ol>  |
| <b>Procurement &amp; warehouse</b>        | <ol style="list-style-type: none"> <li>29. Organize procurement or purchasing among <b>several suppliers</b> to reduce dependencies and avoid delivery problems</li> <li>30. Increase <b>national or regional sourcing</b> to cushion delivery difficulties from Asia and overseas</li> <li>31. Expand <b>storage capacities</b> to cushion supply bottlenecks or order increases</li> <li>32. Flexibly organize the <b>deployment of staff</b> in the warehouse and during order picking</li> <li>33. Monitor and anticipate <b>return rates</b></li> </ol>  |
| <b>Logistics</b>                          | <ol style="list-style-type: none"> <li>34. Provide a scalable and competent <b>logistics team</b></li> <li>35. Ship directly from <b>warehouses</b> or existing branches when demand is high</li> <li>36. Keep <b>packaging and shipping materials</b> to a minimum</li> </ol>  |

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### Further studies on digital commerce and digital marketing:

- The **Bernet ZHAW study** examines the engagement of Swiss companies, authorities and non-profit organizations on social media, including social media advertising (Bernet ZHAW Study, 2021, 2022).
- The annually published "**E-Commerce Report**" of the FHNW is qualitative in nature and is based on interviews with e-commerce managers of market-shaping Swiss companies (Wölfe & Leimstoll 2020).
- Various studies are published on **eCommerce Europe** and Euro Commerce, including the European E-Commerce Report 2022, in which the HANDELSVERBAND.swiss was involved (Lone & Weltevreden, 2022).
- The Retail Institute in Cologne (**EHI Retail Institute**) publishes various studies, including "E-Commerce-Markt Deutschland" (EHI 2021) and "E-Commerce-Markt Österreich/Schweiz 2018".
- **IBI Research at the University of Regensburg** publishes the "eCommerce Guide" and other e-commerce studies.
- The **Institute of Retailing in Cologne** (IFH) publishes various studies on digital business, such as the Online Retailing Industry Report (IFH 2021).
- The **Internet Study of the University of St. Gallen** (HSG) surveys consumers on online shopping (Rudolph et al. 2019, 2020, 2021).
- The **e-commerce barometer** of the Zurich University of Applied Sciences (HWZ) analyses consumer demand on behalf of the Swiss Post every year.
- The **HANDELSVERBAND.swiss**, together with the GfK and Swiss Post, regularly surveys e-commerce growth (HANDELSVERBAND.swiss 2021). With Google and mindtake the Omnichannel Readiness Index, the association also determines the maturity level of Swiss omnichannel providers (ORI 2020).
- In collaboration with a panel of experts, the management consultancy **Carpathia** determines the turnover of the largest Swiss online shops and the B2B Monitor every year and publishes them on its [blog](#).
- **Wunderman Thompson** published (formerly under the name Futurecom and Y&R Wunderman) the 2018 e-commerce study, surveying 2,000 people from Switzerland (Y&R Wunderman 2022).

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In order to make online shopping in Austria easier, the **Austrian Retail Association** and the **Kronen Zeitung** offer the largest directory for domestic webshops: eCommerce Austria

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Founded in Baden, Switzerland, in 1996, the Swiss software company BSI has about 400 employees and 8 offices in Germany and Switzerland. The company's customers include about 130 banks, insurers, trading and utility companies – and all use BSI, delighting about 27 million end customers throughout Europe. With its BSI Customer Suite, BSI provides a comprehensive platform for the digital transformation of customer relationships. It is based on many years of industry experience and continues to grow along with the company.

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Online merchants can integrate the products directly in the webshop and, in a modular approach, expand them into a total solution as desired. In addition, CRIF offers solutions in address management and risk management, in particular solutions and consulting.

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More information at: [www.handelsverband.swiss](http://www.handelsverband.swiss)

## Austrian Trade Association

The Austrian Trade Association has been active since 1921 as a free representation of interests and innovation platform to provide the best possible support for its 5,000 members with approximately 300,000 employees that achieve an annual turnover of more than 65 billion euros and together cover 85% of the market. In addition to the members numerous companies of diverse specializations are associated with the trade association as partners.



The association's portfolio includes five innovative industry congresses, the discussion format [handels]zone, the trade magazine RETAIL, the online magazine retail.at, the publication of multiple studies and the Handelsverband Academy. The online platform KMU RETAIL offers know-how, retail data and legal security to all Austrian retail companies.

More information at: [www.handelsverband.at](http://www.handelsverband.at)

## **TWINT Ltd.**

With TWINT, you can make convenient and secure payments with your smartphone – at the cash register in a supermarket, in an online shop, when shopping at a farm shop, on public transport, when parking, or when transferring money to your friends. With more than four million registered users, TWINT is the leading payment app in Switzerland. In September 2016, the merger of the two Swiss payment apps Paymit (UBS, Six and various banks) and TWINT (Postfinance) was officially entered into the commercial register. What is now known as TWINT Ltd. has existed since September 2016 and has become more well-known among the Swiss public in recent years. An ever-increasing number of new merchants, acceptance points and users has transformed the company into one of the most popular payment brands and most frequently used apps in Switzerland.

More information at: [www.twint.ch](http://www.twint.ch)



## **JMC Software Ltd.**

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Voicetechnix



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Unternehmenskultur und Digitalisierung – wenn Plattformen & Tools richtig eingesetzt werden

CARGO  
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Beda Vivani  
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Digitales Warenlager oder keine Zeit für Wirtschaftlichkeit? Wie der 3D-Druck aus einem Hype eine krisenresistente Lösung erzeugt

Carpattia AG



Alexandra Scherrer  
CEO

B2B-Monitor 2022 – Mobile Commerce

# E-Commerce Lab @zhaw

The E-Commerce Lab is the leading Swiss competence center for digital sales and online commerce. We conduct interdisciplinary, applied research as well as education and training in e-commerce.

## Research Focus

The E-Commerce Lab of the Institute of Marketing Management (IMM) conducts research on current topics in digital marketing and sales with a focus on the following areas:

- E-commerce / digital commerce
- Cross-channel and omnichannel sales in B2C, B2B and D2C
- Services, e.g., virtual consultation, configurators, live chat / chatbots, payment
- Social commerce and live shopping
- Cross-border e-commerce
- Technologies and tools in e-commerce
- Customer acquisition and retention in e-commerce
- Sustainability in e-commerce (e.g., re-commerce, sharing commerce, circular economy)
- Challenges and success factors in e-commerce

## Consulting & Projects

The E-Commerce Lab provides support at all levels to take your e-commerce to the next level:

- **Contract research:** You place an order with us to work on your company-specific problem.
- **Bachelor and Master Theses:** Let our students work on a question from e-commerce as their final thesis.
- **Innovation projects:** We accompany you in the conception and implementation of product, process, or service innovations.
- **Studies:** Together with companies, associations and societies, we carry out both qualitative and quantitative studies on specific or general issues of online trade and digital marketing.
- **Next level e-commerce:** Together we take your e-commerce business to the next level.
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- **Second opinion:** We provide an independent second opinion on your current business issue (e.g., marketplace integration, expansion, positioning).
- **In-house training:** We impart sound expertise on your employees within the framework of topic-specific training courses.

## Contact

We will be happy to answer any questions – including about the detailed **E-Commerce Lab Framework** on the next page – and look forward to hearing from you!



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# E-Commerce Lab Framework



## E-Commerce Lab Framework @zhaw



Analyzing, developing, optimizing, and scaling online stores

### 1 Strategy & Business Model

- 1.1 E-commerce strategy  
(incl. vision, mission, values, and purpose)
- 1.2 E-commerce concept
- 1.3 E-commerce business & revenue models

### 2 Management, Organisation & Culture

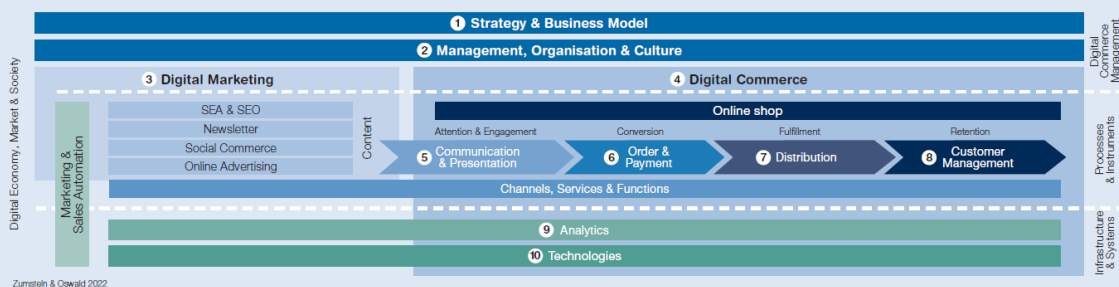
- 2.1 Management and leadership principles
- 2.2 E-commerce organization  
(incl. marketing, sales, order fulfillment, warehousing, logistics, customer service, etc.)
- 2.3 Financial resources (budgets)
- 2.4 Human resources  
(Staff: roles, qualifications, competence, etc.)
- 2.5 Technical resources (e.g., infrastructure)
- 2.6 Partnerships with consultants, agencies, and implementation partners
- 2.7 Culture (values, code of conduct, behaviors)

### 3 Digital Marketing in E-Commerce

- 3.1 Search engine optimization (SEO)
  - Onsite optimization (e.g., keywords)
  - Offsite optimization (e.g., backlinks)
  - Google Shopping
  - Google MyBusiness
- 3.2 Search engine advertising (SEA)
- 3.3 Email & newsletter marketing
- 3.4 Social media & social commerce
  - Facebook marketplace
  - Facebook account, ads & shops
  - Instagram account, ads & shops
  - LinkedIn account & sales navigator
  - YouTube account & ads
  - TikTok, Snapchat, Pinterest, etc.
- 3.5 Influencer marketing
- 3.6 Online advertising (e.g., display ads)
- 3.7 Affiliate & partner programs
- 3.8 Mobile marketing (e.g., geolocalization)
- 3.9 Content marketing in e-commerce
- 3.10 Community management

### 4 Digital Commerce & Online Stores

- 4.1 Sales channels
  - Own online shop & partner shops
  - Native app with order feature
  - Digital marketplaces (e.g., Galaxus)
  - Omnichannel
    - Physical stores (e.g., new concepts)
    - Personal sales on-site
    - Sales stands at trade fairs
    - Order card in a printed catalog
  - Orders via email
  - Orders via EDI & ERP
  - Social & livestream commerce
  - Messenger commerce (e.g., WhatsApp)
  - Voice commerce (e.g., voice assistants)
  - Virtual commerce (e.g., Metaverse, AR, and VR)
- 4.2 Online stores
  - Products & brands
  - Category management
  - Pricing
  - Assortment width
  - Assortment depth
  - Sales and business processes
  - Functions & services (see 5 to 8)



### 5 Communication & Presentation

- 5.1 Navigation
- 5.2 Search
- 5.3 Product filter & product finder
- 5.4 Product list & reminder list
- 5.5 Quick links & product access
- 5.6 Product detail page
- 5.7 Product images (Zoom, 3D) & product videos
- 5.8 Configurator
- 5.9 Recommending alternative products
- 5.10 Recommending additional products
- 5.11 Product comparison
- 5.12 Product assessment
- 5.13 Product availability (in an online or physical store)
- 5.14 Personalization (e.g., offers, prices)
- 5.15 Quality seal & store certification
- 5.16 Virtual tours
- 5.17 Video consulting (e.g., webinars and live demonstrations)
- 5.18 Live chat & live consulting
- 5.19 Chatbots
- 5.20 Augmented & Virtual Reality (AR/VR)

### 6 Order Placement & Payment

- 6.1 Customer account & guest order
- 6.2 Shopping cart & checkout
- 6.3 Payment methods
  - Payment on invoice
  - Credit card, debit card, & PayPal
  - Mobile payment (e.g., TWINT)
  - Buy now, pay later (e.g., installment payment)
- 6.4 Credit assessment

### 7 Order Fulfillment & Distribution

- 7.1 Warehousing & logistics management
- 7.2 Delivery speed & delivery date
- 7.3 Delivery costs (e.g., free delivery)
- 7.4 Shipment tracking and delivery status
- 7.5 Click & collect and click & reserve
- 7.6 Returns management (e.g., free return)

### 8 Customer Management

- 8.1 Customer Service (e.g., call centers)
- 8.2 After sales & complaint management
- 8.3 Loyalty programs & customer cards

### 9 Analytics & Automation

- 9.1 Campaign analytics
- 9.2 Digital analytics (e.g., Google Analytics)
- 9.3 Social media analytics (e.g., web monitoring)
- 9.4 Shop analytics (e.g., ERP, Shopsytem)
- 9.5 Customer analytics (e.g., CRM, BI, and DWH)
- 9.6 Testing (e.g., A/B & multivariate testing)
- 9.7 Marketing & sales automation

### 10 Technologies & Architecture

- 10.1 Online store systems
- 10.2 Payment systems (PSP)
- 10.3 ERP (enterprise resource planning)
- 10.4 CMS (content management system)
- 10.5 PIM (product information management)
- 10.6 CRM (customer relationship management)
- 10.7 Newsletter and campaign tools
- 10.8 Inventory management systems
- 10.9 MAM (multimedia asset management)
- 10.10 Native apps (Apple & Android)
- 10.11 Other ancillary systems of online stores



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#eCommerceLab

# Continuing Education

## CAS in Digital Commerce

Practice-oriented, scientifically based program for digital sales specialists. The content is taught in following two modules.

### Module 1 – Digital Commerce:

- Development of e-commerce and national/international markets
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- Strategy development and business models in digital business
- E-commerce strategies and concepts
- Social commerce, voice commerce and internet of things (IoT)
- Omnichannel and shop management
- Mobile and social commerce and digital services

### Module 2 – Online shops:

- Creation and presentation of product information
- Analysis and optimization of the basket value and ordering process
- E-payment and payment methods
- Usability and user experience (UX) of online shops
- Logistics and distribution
- Cross border management
- Shop and digital analytics

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- Omnichannel sales in B2B
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- Organization and change management

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- Communication and social media in B2B
- Marketing and digital marketing in B2B
- Products and services in B2B
- Customer management and services
- Analytics in B2B and marketing automation
- B2B digital best practices day with 13 presentations by professionals

Course starts in August 2023. More information and registration at:

[www.zhaw.ch/imm/casb2b](http://www.zhaw.ch/imm/casb2b)



# School of Management and Law

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