

The Swiss e-Commerce factor in international sales and deliveries

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// THE SWISS FACTOR IN E-COMMERCE

Data collected by the Observatory created by NetComm Suisse – the Association aiming to support the needs of all companies operating in the e-Commerce field in Switzerland – highlighted that Swiss users have a strong habit of purchasing online, proven by high market expansion rates in all population segments and in all business sectors. A country with 8 million inhabitants and 4.2 million online shoppers with an annual average expenditure of almost 2,000 Swiss Francs per person is undoubtedly an e-Commerce Champion from the consumption point of view.

Switzerland is also an international e-Commerce hub, a chance for companies already selling online in the rest of Europe to grow their revenue by encouraging exports from Switzerland, and not only imports. The paradigm shift suggested by this research, created in co-operation with ContactLab, confirms what could only be sensed and not demonstrated previously: a CH factor actually exists in global e-Commerce.

ContactLab's analysis examined 5 countries (Germany, France, Italy, Spain, UK) and 4 extra-European reference markets (Shanghai, Guangzhou, New York and Los Angeles) identifying **millions of consumers potentially interested in buying products/services made in Switzerland or sold by Swiss online shops**. With different reasons and perceptions, depending on the country, Switzerland, as a whole, benefits of a strong reputation on different items: the high quality of Swiss products is the first recognized value in Germany (48% of cross-border market) and in China (49% in Shanghai, 44% in Guangzhou); the online services' reliability is bestowed by Germany (42%), UK (40%) and Guangzhou (43%); the Swiss delivery promptness has the highest appreciation levels in China (39% in Shanghai, 44% in Guangzhou), while payment security and safety when buying from Switzerland are the first thought for 36% of Spanish interviewed people.

Other features linked to Switzerland are the unicity of certain products, cost-effectiveness and an excellent customer care. These cultural traits should be added to Swiss plurilingualism: together they represent an added value which contributes in pushing new customers to whoever is able to exploit it.

The analysis, carried out by ContactLab during the month of April, found the presence of 12 million Swiss Promoters in Germany, and at least 6 million in UK. All companies that, so far, envisaged Switzerland “only” as a country with 4.5 million high-level shoppers, can now consider it also as an exporting country, able to double their revenue. In Europe there are 30 million potential buyers attracted by goods from this origin, but this chance has to be actually put into effect, keeping in mind that any export process from Switzerland always implies customs clearance hurdles which should be handled by expert providers such as Swiss Post, that, thanks to over one hundred years experience, was naturally inclined to support our research.

If, as we believe to have proven, a Swiss factor does exist in e-Commerce, the first task for this sector stakeholders is to **encourage cross-border online shopping** on the basis of the framework outlined by our research, which shows an inverse relationship between the total number of cross-border customers and the e-Commerce penetration level with reference to the market segment value: in Spain, 66% of online shoppers buy cross-border, while this share is 49% in France, 37% in UK, and 32% in Germany. However, thanks to a greater and greater e-Commerce market, the main segment for purchases from foreign websites is located in the UK (about 10 billion dollars). Also in China – a country that recently signed an important trade agreement with Switzerland – it is possible to estimate in about 4.3 billion dollars the segment of online purchases from abroad.

Once evaluated the potential and identified specific interests, the **digital strategy to promote the Swiss e-Commerce Factor** will include different goals: increasing support to customers on European markets, giving unconditioned guarantees on the protection of personal data for the US market, and supplying quality products in Asian markets, luxury-hungry and avid of goods that are hard to counterfeit. For each strategy, it is crucial not to forget local preferences on individual e-Commerce aspects, from purchase channels to payment methods.

Switzerland has the great chance to move its singularity – big internal market and inclination to buy from foreign websites – to the outside, reversing the perspective to the advantage of national companies. //

Carlo Terreni

General Director and Head of the Observatory

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NetComm Suisse e-Commerce Association



e-Commerce in Switzerland

Besides being an alternative selling channel for goods and services, electronic commerce in Switzerland is now an economic reality, involving a number of small and large companies wishing to diversify their marketing and sales strategies.

In this context, the need for a Swiss e-Commerce Association emerged: **NetComm Suisse**, the first and only entity of this kind in Switzerland. The main goal of NetComm Suisse is to support the interests of all companies operating in e-commerce, supplying services and **promoting networking activities for operators and merchants**.

Observatory NetComm Suisse



NetComm Suisse has recently created its own Observatory, aiming to develop a stable organization of operators and researchers charged of commissioning, directing and carrying out qualitative and quantitative research about online commerce in Switzerland. **NetComm Suisse Observatory defines guidelines, collects study data and cooperates with important research institutes on a national and worldwide scale, to realize reliable reports on the development of e-commerce.**

Monitoring, analysis and guidance. The Observatory offers knowledge tools to companies, thanks to its ability to catch a snapshot of e-commerce in Switzerland and to monitor its evolution on regular basis. Moreover, in order to support the activities of the Observatory, NetComm Suisse is looking for collaborations with entities gathering relevant data on the Swiss territory and interested in the disclosure of their knowledge. During their analysis of the market, Observatory specialists intercept and interpret emerging trends considered of interest for operators and associates.

Research projects. The Association is searching for partners/sponsors interested in the realization of an important research project on national basis (Switzerland, Italy, Germany and France), involving four international universities and over 400 students.

For further information please contact info@netcommsuisse.ch



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ALESSANDRO MARRAROSA

Alessandro Marrarosa is co-founder and is now President of NetComm Suisse, the Swiss E-Commerce Association. He gained a master in Computer Science at SUPSI and a federal certification as Marketing specialist. He started his career as a web programmer and then project manager in Swiss Post and is now Market area manager for small and medium-sized enterprises in PostFinance SA. He has a strong experience in digital innovation and improvement of business processes. Marrarosa's main responsibility is to help, with his team, enterprises to automate billing and payment processes.



CARLO TERRENI

Carlo Terreni is co-founder and Member of the Board of NetComm Suisse Association. Since August 2012, he is the General Director of the Association and he works with passion and determination to sustain the development of an e-Commerce culture in Switzerland. Carlo is supporting, through his personal networking activities and the coordination of his brilliant team, the connection between NetComm Suisse Associates, creating bridges among companies which often "convert" in concrete business opportunities. Carlo is Head of the NetComm Suisse Observatory and he works, with institutional Partners, towards the establishment of a permanent e-Commerce Observatory. Its goal is to supply strategic quantitative data on electronic commerce to the Swiss e-Commerce community, in order to help decision makers to understand and exploit the full potential of the Swiss and European online markets. Carlo has personally financed MarteDigital, the first Regional Google Certified Training Academy in Italy; he previously worked as a digital consultant and account manager for Tinext SA and for Valdani Vicari & Associati Consulting Company. He earned two Master Degrees in marketing and sales at Copenhagen Business School and Bocconi University and he obtained his High School Diploma at Lasswade High School in Scotland.



PHILIPP MÜLLER

Philipp Müller is Member of the Board NetComm Suisse Association. Being fascinated by new technology, he made his first career-steps within telecommunication sector. After achieving a bachelor's degree in international management and a master's degree in business development, he spent three months on a voluntary field service in Africa. Ready for a new chapter, he started as a marketing manager for cross-border e-commerce products at Asendia Switzerland. In his actual position as a senior e-business developer at Swiss Federal Railways, he is responsible for developing new business models for the digital channels.



SERSE BONVINI

Serse Bonvini is co-founder and Member of the Board of NetComm Suisse Association. Since 1991, he has been working on IT environments as Project Manager, Account Manager and Consultant. Deep knowledge of all IT fields is his strong point, which enables him to understand quickly many complex technological problems. He has a wide experience in e-commerce, ECM/EIM solutions like DMS platforms, workflow, search engines, collaboration and archive tools. He also boasts an in-depth knowledge of web marketing dynamics and management of Web Development Projects based on CMS/WCM Systems. He has good Digital Communication and Web Marketing skills in SEM, SEO and SMM services. Since 2002 he is Senior Consultant and Project Manager in Tinext SA, where he manages large accounts in the three business areas of the company: Enterprise Content Management, Web Development and IaaS Services. He is responsible for strategic projects in the tourism field.

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Our Activities



Research Partner



ContactLab is a market leader in **digital direct marketing** products and services and a **strategic partner** for enterprise clients who wish to manage a direct customer engagement model on a global scale.

With offices in Milan, Paris and Munich, over 1000 customers, 15 years of experience and more than 130 specialists, ContactLab provides comprehensive integrated marketing solutions to **enable top clients and brands to meet and exceed their business objectives** through sophisticated **digital engagement programs** with their customers and prospects.

Over the years, ContactLab has expanded its offering by including **added value services** to its **leading technological platform** for digital messaging, enabling the uptake of digital marketing as a user-centric strategic tool for business growth. As of 2012, the company has had a division dedicated to **market research**, dedicated to providing its clients with **complete informational support**, also through the development of **ad-hoc research projects** to cater to every operative and strategic marketing need.

The **European Digital Behaviour Study**, an ongoing project since 2009, offers a specific contribution to investigate the evolution of behaviours of internet users. The whole project is aimed at measuring the relationship between **users** and **digital** channels; outlining the ecosystem that encompasses those firms which make e-commerce a strategic lever for their business. The study investigates European and extra-European markets through a representative sample of the regular internet users aged 16-65 (by Eurostat definition).

For further information about ContactLab and its research projects, our experts are available at study@contactlab.com

Research Main Sponsor



Swiss Post is a modern company wholly committed to serving its customers. We have many years of experience in exports, allowing us to provide a wide range of cross-border services for business and trade. Whether you want to attract, retain or supply to customers, we can offer you customer proximity worldwide. Thanks to our comprehensive international distribution network, in cooperation with the joint venture Asendia, we have in-depth knowledge of the local markets. This means that we can provide you with an efficient and reliable global e-commerce service. We support you in expanding your online business worldwide – from new market localization and marketing through to logistics and distribution. We are a reliable, socially and environmentally responsible partner offering you a one-stop service.

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Interview to Claudia Patocchi.

How to exploit cross-border e-Commerce potential?



Claudia Patocchi

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1) e-Commerce is growing at full speed in Switzerland, but international markets are developing their potential as well, throughout Europe and overseas. Why should a Swiss company sell internationally?

The Swiss market is very small in comparison to the European market, and if the Americas and Asia are added as well, there are almost unlimited possibilities for Swiss companies to increase and multiply their sales potential abroad. The excellent quality of Swiss products wins over customers. This can justify a higher price. Typical Swiss products in particular are very popular abroad (for example: Victorinox, Freitag bags, etc.). However, higher-value products where customers know that they can rely on the quality and will not receive counterfeit or damaged goods are also in demand, especially in Asia. In addition, shop operators with lower-value goods can use the locational advantage of Switzerland and profit from VAT advantages in comparison with their European colleagues.

2) Becoming international is a multifaceted challenge: what are the main factors, particularly concerning currency value, to be taken into account?

If a Swiss company opens up its homepage for international orders as well, it makes sense to react to the respective conditions regarding purchasing power and currency in the price strategy as well. Customers in Germany are offered the products directly in euros (depending on whether it is more inexpensive than in Switzerland). At this time, shop operators bear the currency risk but can also orient their price policy to the respective target country. Legal aspects must also be checked and properly regulated (general terms and conditions, etc.).

3) What are the key issues in the logistics and distribution field that an e-commerce seller should also consider when handling cross-border operations?

Cross-border e-commerce is both a challenge and an opportunity!

It must not be forgotten that the delivery of the ordered goods is the only physical contact between the shop operator and the customer. It is therefore important that everything runs smoothly during this process and that the important aspects are taken into account and planned for at the very beginning. Then there will be no nasty surprises for the shop operator or the purchaser, and the purchaser will become a satisfied customer.

Frequently mentioned barriers to cross-border e-commerce are the high delivery costs, long delivery times, complex customs and VAT formalities, and complicated return processes. For this reason, it is important to have the right partner at your side for logistics, in order to overcome these barriers together and be transparent to customers at the same time.

Interview to Claudia Patocchi.

How to exploit cross-border e-Commerce potential?

As a result, efficient logistics and properly running delivery services lead to a successful shopping experience for the customer, which in turn leads to repeat purchases and positive feedback in online forums.

Specific examples for logistics/distribution that can be considered from the very beginning are: In Warehousing & Fulfilment: Clarification of the correct franking and labelling of the goods helps to achieve a smooth procedure when delivery staff hand over and deliver the consignment in the destination country. Selecting a warehouse location near an airport/letter center can also reduce delivery times. Clarifications regarding customs and VAT, dangerous goods and the correct declaration on the consignments prevent blocking at customs and delays in delivery. Selecting a DDP solution (delivery duty paid) for higher-value products allows customers to receive goods conveniently in their letter box without further expenditure. In the case of lower-value consignments, the online shop and recipient benefit from VAT exemption limits without incidental expenses. In Delivery, it is important to communicate realistic delivery times in order not to strain the recipient's expectations. The Track & Trace option relieves shop operators and their customer service, as customers can independently check the progress of their consignments. At the same time, the shop operator can react if there are unexpected problems with shipping (customs blocking, delivery to neighbour) and inform the customer correspondingly or send out a replacement consignment. Returns management can also be planned in advance with various steps, for example with a precise description of the goods (reduction of returns) as well as the use of online return labels that require a certain initiative on the part of the customer and simultaneously inform shop operators about the goods returning to the warehouse for new orders.

4) How prepared do you feel Swiss entrepreneurs are, particularly in understanding opportunities and challenges? How could awareness and knowledge be promoted further?

Currently, Swiss companies, especially SMEs, are still reluctant to take the step abroad. The above-mentioned barriers in particular are over-interpreted, as the corresponding information and contacts are lacking. Companies such as Swiss Post must increasingly present themselves as a support for customers and advise them in taking a step abroad.

The aim is not to be deterred by the obstacles but to understand these barriers and overcome them together with strong partners. In this case, the online shops are not alone. And the Internet offers too many possibilities for increasing one's own limited market and sales to withdraw or be deterred from taking the step abroad out of fear. This means that everyone must become more aware of the opportunities that the Internet offers, and the challenges have to be relativized or well planned and thereby overcome. We have noticed that smaller startups in particular are currently taking the step abroad more quickly and are successful at this.

5) If you had to sort industries and target countries, where do you think that the priority should lie?

According to European studies, countries such as the UK and France as well as the Scandinavian countries are very strong in cross-border e-commerce. However, Asian countries such as China and Japan also like to order from abroad. Due to the language affinity, the neighbouring countries would initially be attractive to Swiss e-commerce operators, as this would reduce the expense of opening up an website.

Interview to Claudia Patocchi.

How to exploit cross-border e-Commerce potential?

The product groups vary quite a bit; these can be typical Swiss products such as pocket knives and chocolate, or higher-quality products such as watches or simply niche products. The VAT advantages from Switzerland for lower-value products should of course also be kept in mind.

6) What are the current challenges for Asendia Switzerland?

Swiss Post also faces the familiar obstacles in e-commerce: delivery cost pressure, T&T requirements, customs and VAT challenges, returns management and fast delivery times.

7) How does Swiss Post, as a postal service provider, deal with these challenges?

Swiss Post is in close contact with its customers, both to support them in successful efforts in cross-border e-commerce and to learn about new customer requirements and to find solutions. In addition, Swiss Post also works on an international level on various projects in the field of delivery with T&T, so-called DDP solutions and returns management.

8) What are the next projects and activities? Are there events that entrepreneurs and entrepreneurial associations can attend in order to share knowledge and spread information?

Specific projects include the Interconnect Project of the IPC (International Postal Corporation), an e-commerce initiative with the goal of offering a fast, reliable delivery option including state-of-the-art RFID tracking. Swiss Post also works together with other postal companies on a solution for a prepaid, trackable returns solution.

Projects in the field of DDP solutions are currently in development as well, so that goods ordered from Switzerland arrive at the recipient without additional costs. Within Swiss Post, the importance of e-commerce is also recognized, which is why a Group-wide e-commerce group known as PostCommerce has been set up. Part of this project is the YellowCube service. This offers SMEs outsourcing options for storage and ordering. We can help customers along the entire value chain. With this service, customers can rely on the expertise of Swiss Post from A to Z and freely select individual service modules (e-marketing, distribution, payment service, returns management, customer care service). The next interesting event is a Netcomm YellowCube event, at which SMEs can familiarize themselves with the YellowCube options, find out a lot of new information about the service and support from Swiss Post, Netcomm and further partners on the topic of internationalization, and make contacts. In addition, there is another interesting conference with a trade fair in Baden, Switzerland in November, Swiss E-commerce Conference TRAFO.

9) What is the added value does Asendia Switzerland offer to any customers interested in starting to operate internationally?

Apart from that, Swiss Post acts as an integrated e-commerce provider; end customers can rely on a national and international partner in the e-commerce business and select the support that they desire from among different modules. Experienced project team members are available for this. In the field of internationalization, Swiss Post can also look back on lengthy experience and a portfolio of satisfied customers. Swiss Post's strength is that it can respond to individual customers and their

Interview to Claudia Patocchi.

How to exploit cross-border e-Commerce potential?

requirements and develop individual solutions with customers to allow them a successful start in cross-border business.

10) Why are you supporting NetComm Suisse and what are the objectives that such an organization should meet in order to help the market as a whole to grow and mature?

NetComm Suisse is the first e-commerce association in Switzerland. NetComm is committed to ensuring that operating frameworks are created that support entrepreneurial performance within the e-commerce sector. The association also offers a platform that serves knowledge transfer and exchange of opinions among individual market participants. Furthermore, NetComm organizes regular information events at which the latest conditions, market developments and trends in the international e-commerce sector are discussed. As a logistics company, we are active in the international e-commerce sector and offer our customers the right solutions. To continuously optimize our range of services, we require a regular transfer of knowledge with all market participants. The partnership with NetComm helps us to do this.



Swiss Post – your cross-border e-commerce partner

Together with Asendia SAS, Swiss Post supports you in the process of internationalizing your online shop. With services ranging from preparation and marketing to logistics and distribution, we offer you optimal conditions for cross-border e-commerce. Tap new market potential with us!

More information: [swisspost.ch/distanceselling-international](https://www.swisspost.ch/distanceselling-international)

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Our Associates





STUDY PRESENTATION

Study Presentation

We are delighted to present the “The Swiss e-Commerce factor in international sales and deliveries”, an analysis based on the 2nd Edition of the Netcomm Suisse Observatory carried out by ContactLab*.

Thanks to the new edition of this study, conducted in April 2015, all aspects of **consumer relationships with the internet** have been examined, with special attention given to attitudes and **behaviour while purchasing products and services online**. The methodology applied during the study ensures that the reality of e-Commerce is accurately represented in each market area.

Particularly, the present analysis is focused on the **potential of Switzerland in e-Commerce**, providing a fundamental contribution to understanding the attractiveness and value that this country holds for the international market.

The **Swiss e-Commerce factor**, unveiled by this analysis, is now measured in 5 different European countries – Germany, UK, Italy, France and Spain – and in 4 non-European selected markets: Shanghai, Guangzhou, New York and Los Angeles.

Switzerland has a high diffusion of e-Commerce that is growing steadily: today the 4,7 mio. online shoppers in the 16-65 y.o. range represent 85% of the national population within that age bracket.

Therefore Switzerland needs to expand abroad if it is to continue its growth, especially towards those market areas where segments of **Swiss promoters** are identifiable.

On average across the different market areas, the study identified 25% of respondents who can be thought of as *promoters*. This means there are some millions of online shoppers who could be strongly interested in purchasing products identified as being of Swiss origin.

This is a huge opportunity to be seized by Swiss firms.

As a means of providing concrete support, this analysis offers a focus in each market area to understand what the **digital touchpoints to leverage** for setting up a specific digital marketing strategy are.

* ContactLab's Market Research department conducts an annual European Digital Behaviour Study (EDBS) out of which came this analysis for Netcomm Suisse. Since 2009, the EDBS has offered a full and in-depth analysis of internet consumers.

Executive Summary

↪ Crossborder Shopping: an opportunity for internationalization through e-Commerce

E-Commerce is growing in all countries, faster in those market areas where internet penetration occurred late in the day (Spain, Italy, newcomers).

At the same time, even in the countries whose take-up of the internet occurred earlier (northern Europe and the US), digital behaviour is changing quickly, giving further acceleration to online shopping.

In particular, today the **smartphone is the leading device in terms of pervasivity** (though not yet an exclusive device). What this means is that consumer evolution is trending toward the *always connected* and this is having an impact on consumer relationships with brands.

The **online channel is cross-border by definition**, mainly due to unlimited possibilities to gain information about products, brands and companies.

Nevertheless, when finalizing online purchases, shoppers elect the **most trustworthy channel, i.e. the channel which best minimizes their problems or doubts**: "afraid of not receiving the product", "costs of shipping and handling too high", "trust in online payment methods", etc.

In attempting to solve these conscious or unconscious fears about delivery, today players can take advantage of the **spontaneous propensity of consumers to find opportunities for shopping abroad** :

- In Spain, 66% of total online shoppers are crossborder; followed in Europe by Italy (58%), France (49%), UK (37%) and Germany (32%)
- thanks to the wider e-Commerce market, the main segment by expenditure on foreign sites is the UK (around \$10bn) , followed by the other European countries (\$4bn on average)
- also in China and in the US, crossborder is a large segment with an estimated value of around \$4.3bn just considering the areas of Shanghai/Guangzhou for China and NY/LA for the US

Online shoppers do not look abroad just to find a better price, but also because some products aren't available locally and/or because other countries may offer more satisfactory online services: better product selection, visiting/shopping experience, reliability of payment methods, etc.

For a international e-Commerce player it may be of value to **disclose own country origin** when this offers attractiveness and value in satisfying the consumers' needs.

The following analysis refers properly to the **Swiss Factor for internationalization of e-Commerce**.

Executive Summary

↪ Swiss Factor for internationalization of e-Commerce

The Observatory Netcomm Suisse has highlighted steady growth in the national e-Commerce market: today 4,7mio. online shoppers 16-65 y.o. (85% of national population in the 16-65 y.o. range) buy CHF 9bn of products and services. A significant part of this, 28% of total online expenditure (35% of crossborder online purchasing) goes abroad; a high ratio if compared with other countries.

Therefore, Swiss e-Commerce players need to continue their focus on the internal market but for faster growth they should seize the opportunity to **internationalize online sales**.

Switzerland is a highly recommended location for online shopping, thanks to the recognition of its: **high product quality, trustworthiness of online services/websites, timeliness of delivery and payment security**.

The following main values are recognized by over 30% of international crossborder shoppers on average, while there are specific image perceptions:

- **"high quality"** of Swiss products is the first value recognized in Germany (48% of German crossborder shoppers) and in China (49% in Shanghai, 44% in Guangzhou)
- **"trustworthiness of online services"** has a very good attribution in Germany (42%), in the UK (40%) and in Guangzhou (43%)
- **"timeliness"** of Swiss delivery is highest in China (39% in Shanghai, 44% in Guangzhou)
- **"payment security"** buying from Switzerland is more recommended in Germany (34%) as in Spain (36%)

all these values could be **factors to convert prospects into buyers**.

Across the different sampled market-areas, 25% of online shoppers are **"Swiss promoters"**, intended as shoppers strongly attracted by an online Swiss offer.

Potentially, Swiss e-Commerce could draw new shoppers within huge catchment areas:

- 12,8 million in Germany
- 6,2 million in UK
- 5,5 million in China (only considering Shanghai + Guangzhou)
- 4,6 million in France, 4,1 million in Italy, 3,1 million in Spain, 2,2 million in the US (only considering NY + LA)

Executive Summary

↪ Swiss e-Commerce factor: how to leverage it in Europe

Potentially, there are around 30 million European online shoppers strongly attracted by the online Swiss offer.

Across the border, Swiss promoters are more numerous in Germany and Italy than in France. Also in the UK and in Spain the % of Swiss promoters is below average.

The **3 Swiss factors to push**, particularly as regards German online shoppers, are the “**high quality of products**”, the “**trustworthiness of online services**” and “**payment security**”.

Considering German online shoppers as a benchmark to define a marketing strategy for e-Commerce internationalization, a Swiss e-Commerce player should:

- understand the digital behaviours of each category of buyers (e.g. in the technology arena, internet users are typically email-centric)
- concentrate digital efforts on digital direct activities and videos, more than on social, mainly for mobile users
- offer a wide range of ready-to-send products
- set up a store-like online experience, because this segment loves this channel
- offer more and varied payment possibilities, certainly PayPal, but also bank transfers and invoices

This approach to digital strategy is largely effective also for other European countries, even though each country has its own specific interaction with digital channels:

- In Italy, the level of interactivity is similar to Germany, but info-commerce (searching between products, brands and company) is one of the first activities
- In France, where the e-Commerce trend is very stable, private sale is the preferred channel
- In the UK, internet users are “hyper-actives” so it’s necessary to cover various digital media and channels
- In Spain, where users are more involved in social networking, research of branded products at better prices is widespread

Executive Summary

➤ Swiss e-Commerce factor: how to leverage it for non-European market areas

Chinese online shoppers are very similar to Germans in their propensity towards Swiss e-Commerce and for the values recognized by this country.

Prospectively, many millions of online shoppers could be real prospects for Swiss players, on the basis of the penetration of Swiss promoters as measured in Shanghai and Guangzhou.

For tailoring a digital strategy on the Chinese market, it's necessary to know that:

- the level of enthusiasm for digital is at its highest: for example the **QR code is very appealing**; on the contrary, the fanpage comes across as a more-difficult to manage owned medium
- all contents for pushing online shopping have to be **planned for smartphone reception**, as this is one of the main devices (as it's rapidly becoming in all the rest of the world)
- probably, this target is product-type omnivorous, with an acritical approach at the first step; afterwards the relationship must be managed as in other markets
- **the competition is very intensive** in this market

In the US, considering the large areas of NY and LA, players confront the most advanced usage of internet/e-Commerce platforms and multimedia exposure in the world.

Starting from this assumption, a digital strategy for promoting Swiss e-Commerce could be defined around the:

- **trustworthiness of online services**
- **security for payment/treatment of personal data**

Especially given that, today, a large part of crossborder shoppers look at uniqueness of products

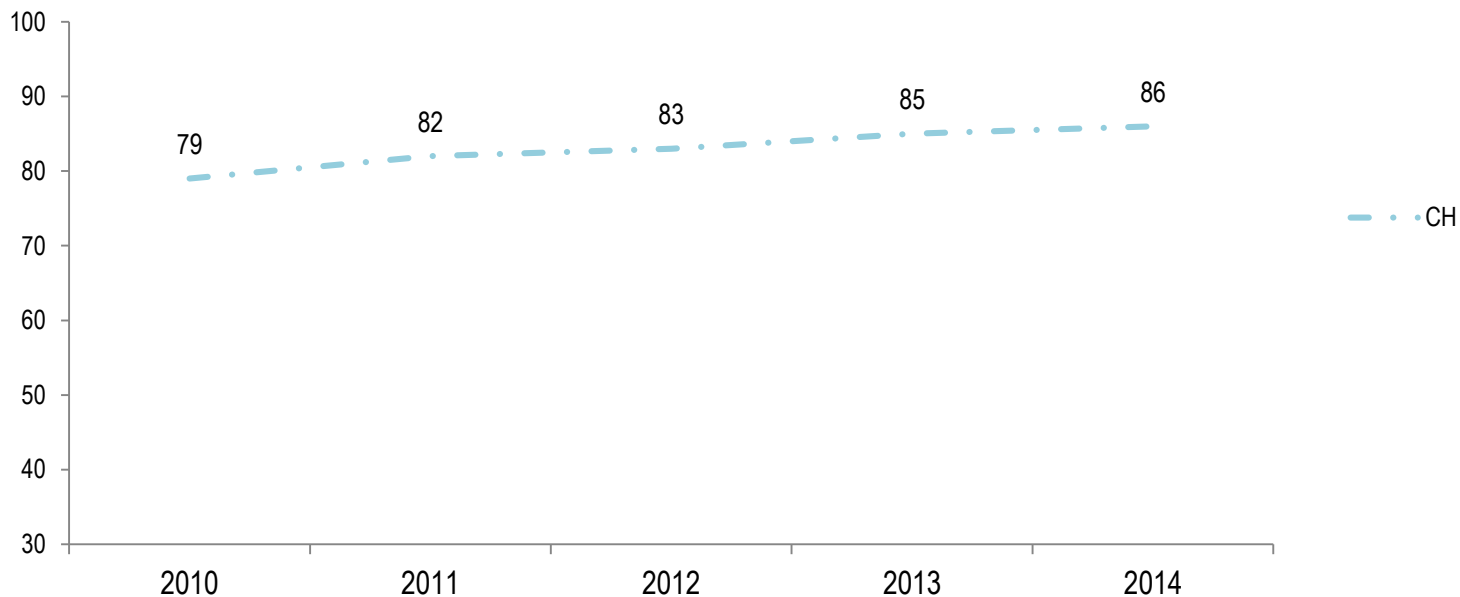
Thus, considering the US as a top benchmark, the value of disclosing the country of origin is confirmed and should be adopted without hesitation.

A hand holding a glowing globe with binary code and various icons in the background. The background is a blue gradient with floating icons like a paperclip, a globe, a magnifying glass, and a smartphone. Binary code (0s and 1s) is visible in the upper left and lower right corners. The text "INTERNET AND E-COMMERCE EVOLUTION" is written in a bold, red, serif font, with a red arrow pointing to the word "INTERNET".

INTERNET AND E-COMMERCE EVOLUTION

SPREAD OF THE INTERNET IN SWITZERLAND

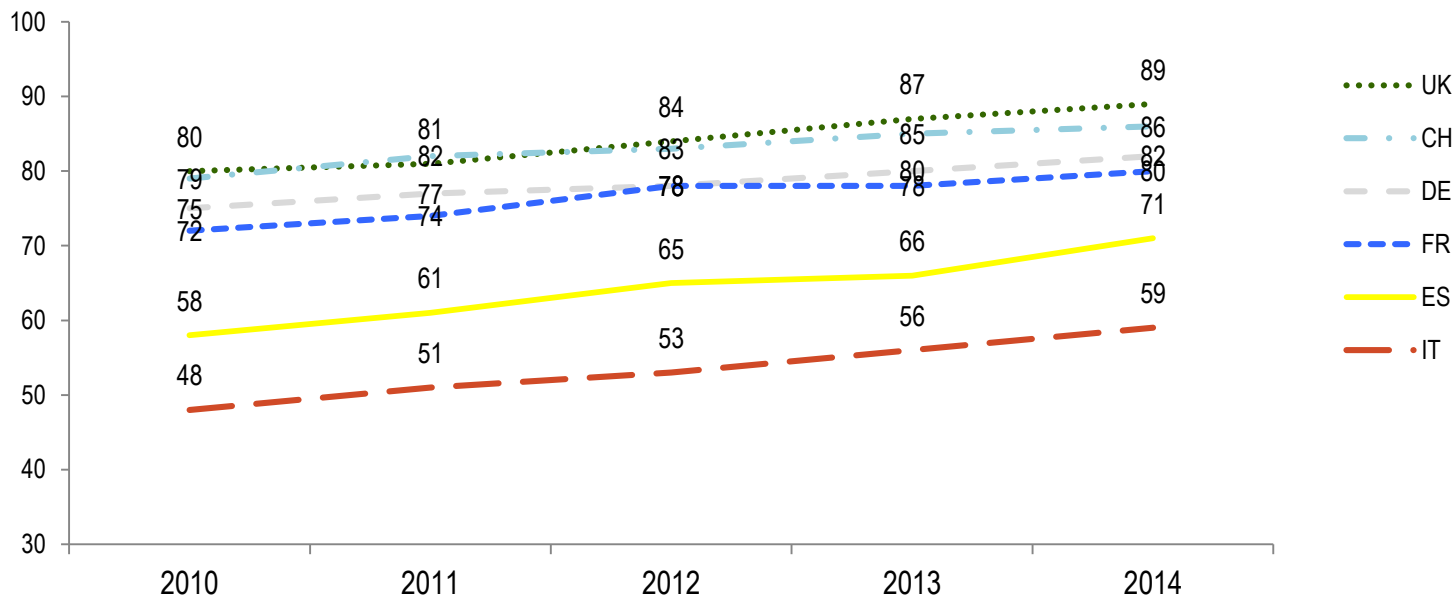
Source: EUROSTAT/ BFS data processed by Contactlab



* Definition by "Eurostat – Information Society": frequency of Internet access: once a week (including every day)

REGULAR* INTERNET USERS AGED 16-74 IN EUROPE

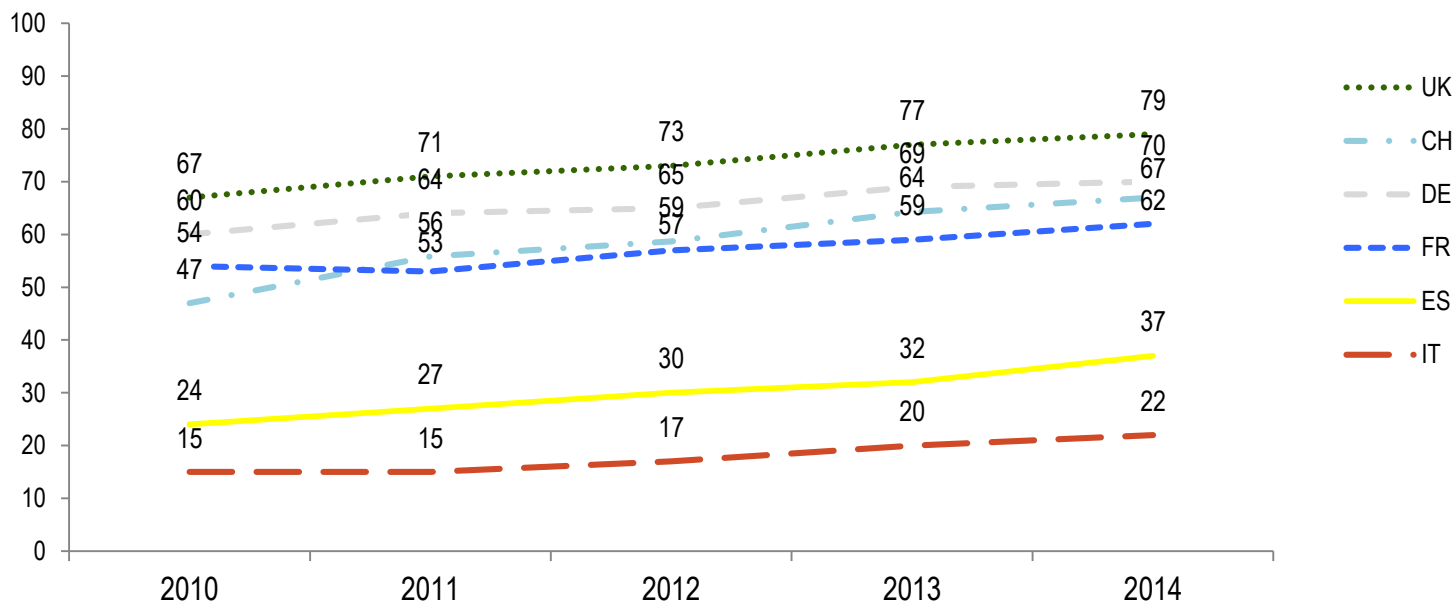
Source: EUROSTAT/ BFS data processed by ContactLab



* Definition by "Eurostat – Information Society": frequency of internet access: once a week (including every day)

ONLINE SHOPPERS LAST 12 MONTHS AGED 16-74 IN EUROPE

Source: EUROSTAT/ BFS data processed by ContactLab



Sources and definition by:

Eurostat – “Information Society”: Last online purchase in the 12 months (UK, DE, FR, ES, IT, CH)

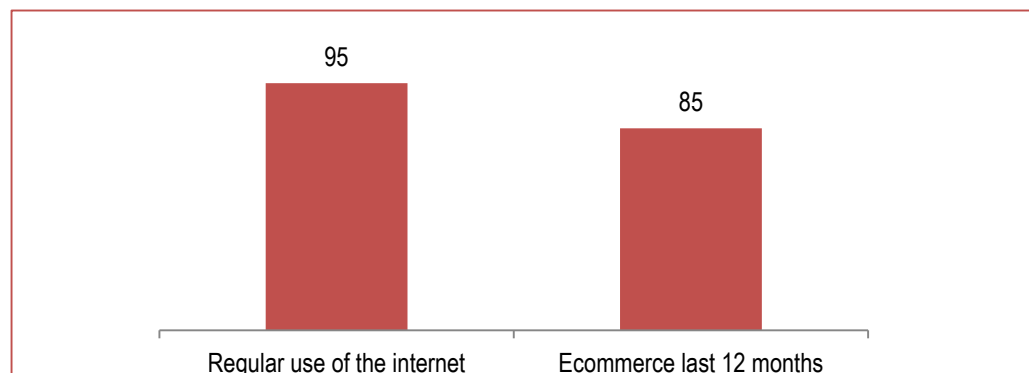
BFS – Use of the internet for purchases/ orders for goods and services (CH 2010)

Only for Switzerland, the values 2011/ 2012/ 2013 are an estimate by ContactLab based on the official BFS/ Eurostat data (2010 and 2014)

NETCOMM SUISSE OBSERVATORY: TARGET POPULATION

Source: EUROSTAT/ BFS data processed by ContactLab

	Total population (.000)	Regular internet users (.000)	Online shoppers (.000)
16-65 years old	5.500	5.200	4.700
	100%	95%	85%



TARGET POPULATION FOR GEOGRAPHICAL AREAS*

Source: EUROSTAT/ BFS data processed by ContactLab



Individuals 16-65 y.o.	Regular internet users	Online shoppers on reg. internet users
	(.000)	(.000)
Total	100% 5.200	100% 4.700
Région lémanique	19% 990	17% 800
Espace Mittelland	21% 1090	23% 1080
Nordwestschweiz	14% 730	14% 660
Zurich	18% 930	18% 840
Ostschweiz	14% 730	14% 660
Zentralschweiz	10% 520	10% 470
Ticino	4% 210	4%* 190*

*NUTS2 areas: **Région Lémanique**: Vaud, Valais, Genève; **Espace Mittelland**: Bern, Freiburg, Solothurn, Neuchâtel, Jura; **Nordwestschweiz**: Basel-Stadt, Basel-Landschaft, Aargau; **Zurich**; **Ostschweiz**: Glarus, Schaffhausen, Appenzell Ausserrhoden, Appenzell Innerrhoden, St. Gallen, Graubünden, Thurgau; **Zentralschweiz**: Luzern, Uri, Schwyz, Obwalder, Nidwalden, Zug; **Ticino**.








** Due to the small sample base, these values show a qualitative indication*



CROSS-BORDER ONLINE SHOPPING









































































CROSBORDER ONLINE SHOPPING: INTERNATIONAL VIEW

(...) over the last 12 months, have you ever completed an online purchase through a foreign e-commerce site (...)?

ONLINE SHOPPERS LAST 12 MONTHS (.000)	 IT	 UK	 DE	 FR	 ES	 SHA+GUA	 NY+LA
	12.400 n=7.042	38.000 n=952	46.200 n=964	31.200 n=877	15.500 n=623	17.700 n=997	9.700 n=995
CROSBORDER SHOPPERS (penetration)	58%	37%	32%	49%	66%	41%	42%
ESTIMATED UNIVERSE OF IND. (.000)	7.200	14.000	14.800	15.300	10.300	7.200	4.100
ESTIMATED EXPENDITURE ON FOREIGN E-SITES	\$ 3,1 bn	\$ 10,3 bn	\$ 4,8 bn	\$ 4,3 bn	\$ 4,8 bn	\$ 4,5 bn	\$ 4,2 bn

TOP 10 PRODUCT CATEGORIES PURCHASED CROSSBORDER

Base: crossborder online shoppers 16-65 y.o., %

CROSS BORDERS ONLINE SHOPPERS (.000)	      						
	IT	UK	DE	FR	ES	SHA+GUA	NY+LA
	58%	37%	32%	49%	66%	41%	42%
	7.200	14.000	14.800	15.300	10.300	7.200	4.100
TOP 10 PRODUCT CATEGORIES PURCHASED CROSSBORDER:	n=3.734 %	n=303 %	n=286 %	n=385 %	n=381 %	n=386 %	n=378 %
Clothing, fashion items	 31	 35	 36	 43	 47	 42	 42
Tech products / home electronics	 32	 19	 17	 21	 30	 28	 32
Watches, jewelry	 6	 17	 14	 12	 14	 28	 23
Beauty products/ cosmetics	 8	 11	 9	 12	 10	 36	 22
CDs, DVDs	 13	 17	 18	 13	 13	 11	 22
Books (print)	 11	 13	 10	 11	 10	 19	 24
Holiday/ travel	 11	 18	 7	 8	 12	 16	 22
Toys/models	 9	 13	 11	 10	 12	 14	 23
Household items	 10	 10	 8	 11	 11	 16	 19
Food, beverages	 4	 10	 8	 6	 6	 27	 20

CROSS BORDER ECOMMERCE: GENERAL REASONS FOR BUYING ON FOREIGN SITES

Base: online shoppers 16-65 y.o. on foreign sites, %

























































Why did you choose to buy online through foreign e-commerce sites rather than on national ones?

CROSS BORDERS ONLINE SHOPPERS (.000)	IT		UK		DE		FR		ES		SHA+GUA		NY+LA	
	58%		37%		32%		49%		66%		41%		42%	
	7.200		14.000		14.800		15.300		10.300		7.200		4.100	
GENERAL REASONS FOR BUYING ON FOREIGN SITES:	n=3.734 %		n=303 %		n=286 %		n=385 %		n=381 %		n=386 %		n=378 %	
Better price		66		52		57		60		67		48		48
Availability of products/ services		55		46		48		31		37		43		38
Greater selection of products, greater choice		29		23		22		34		26		39		25
Nicer, better designed foreign sites		7		9		6		10		8		28		21
More reliability of payment methods		6		9		6		6		8		32		23
More guarantees on product delivery		6		7		6		9		7		24		20
Post-sales services		5		3		6		4		8		20		19
Better security of personal information		3		6		4		5		5		22		14

CROSS BORDER SHOPPERS: FAVOURITE ECOMMERCE CHANNELS

Base: online shoppers 16-65 y.o. on foreign sites, %

Generally speaking as regards online shopping, which are your favourite ecommerce channels?

CROSS BORDERS ONLINE SHOPPERS (.000)	 IT		 UK		 DE		 FR		 ES		 SHA+GUA		 NY+LA	
	58%		37%		32%		49%		66%		41%		42%	
	7.200		14.000		14.800		15.300		10.300		7.200		4.100	
FAVOURITE ECOMMERCE CHANNELS:	n=3.734 %		n=303 %		n=286 %		n=385 %		n=381 %		n=386 %		n=378 %	
Specialized e-site (by type of product or service)		46		33		33		41		40		44		30
Ecommerce portal (with various prod. categories)		50		32		34		41		38		39		30
Retailer's e-site (also having a store)		37		42		34		33		27		35		32
Flagship brand/ company e-site		35		33		34		33		38		34		30
Price comparison site		23		27		28		22		27		38		27
Private sales		17		14		9		33		27		15		22
Groups/ online couponing		14		12		19		13		16		31		24

CROSS BORDER SHOPPERS: PREFERRED PAYMENT METHODS

Base: online shoppers 16-65 y.o. on foreign sites, %

CROSS BORDERS ONLINE SHOPPERS (.000)	IT		UK		DE		FR		ES		SHA+GUA		NY+LA	
	58%		37%		32%		49%		66%		41%		42%	
	7.200		14.000		14.800		15.300		10.300		7.200		4.100	
PREFERRED PAYMENT METHODS:	n=3.734 %		n=303 %		n=286 %		n= 385 %		n=381 %		n=386 %		n=378 %	
Paypal or equivalent		68		73		82		70		78		76		63
Standard credit card		27		42		25		55		29		29		49
Bank transfer (online)		14		19		37		19		12		36		24
Prepaid or rechargeable credit card		50		9		10		8		18		19		20
Payment on delivery (C.O.D.)		20		9		15		7		25		40		17
Payment in-store, after reserving online		10		13		13		12		11		25		20
Sofort/ Direct bank transfer		6		8		30		3		5		21		13
Bank transfer (in branch)		1		7		11		5		11		27		19
Digital wallet		5		6		4		3		3		30		21
Invoice		3		8		30		7		5		9		12
Post-office issued cheque		3		5		3		3		7		9		9










SWISS E-COMMERCE FACTOR

CROSS BORDER SHOPPERS: SWISS IMAGE OF ECOMMERCE

Base: online shoppers 16-65 y.o. on foreign sites, %

Thinking about online shopping, which of the following characteristics would you associate to Switzerland?

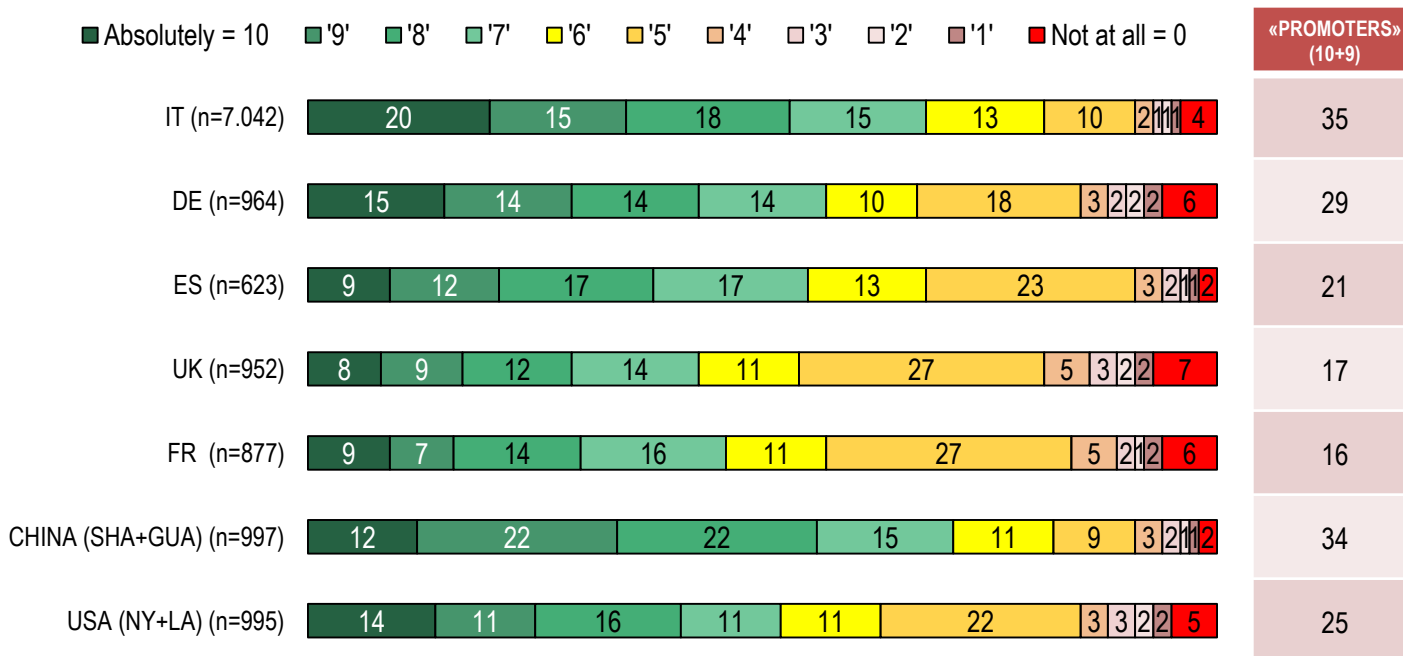
CROSS BORDERS ONLINE SHOPPERS (.000)	 IT	 UK	 DE	 FR	 ES	 SHA+GUA	 NY+LA
	58%	37%	32%	49%	66%	41%	42%
	7.200	14.000	14.800	15.300	10.300	7.200	4.100
SWISS IMAGE FOR ECOMMERCE:	n=3.734 %	n=303 %	n=286 %	n=385 %	n=381 %	n=386 %	n=378 %
high quality of products	31	41	48	37	36	47	37
trustworthiness of online services/ websites	31	40	42	38	33	41	35
timeliness of delivery	31	31	33	30	34	41	32
payment security	27	31	34	33	36	29	29
uniqueness for some kinds of products	18	31	28	28	29	32	31
value for money	16	16	23	22	23	40	32
reliability of suppliers	26	24	28	17	20	21	12
security for treatment of personal data	19	20	19	18	20	28	20

SWISS ECOMMERCE ATTRACTIVENESS FOR FOREIGN ONLINE SHOPPERS

Base: users aged 16-65 shopping online in the last 12 months in each country, %

How strongly would you recommend buying a product online from a site based in Switzerland?

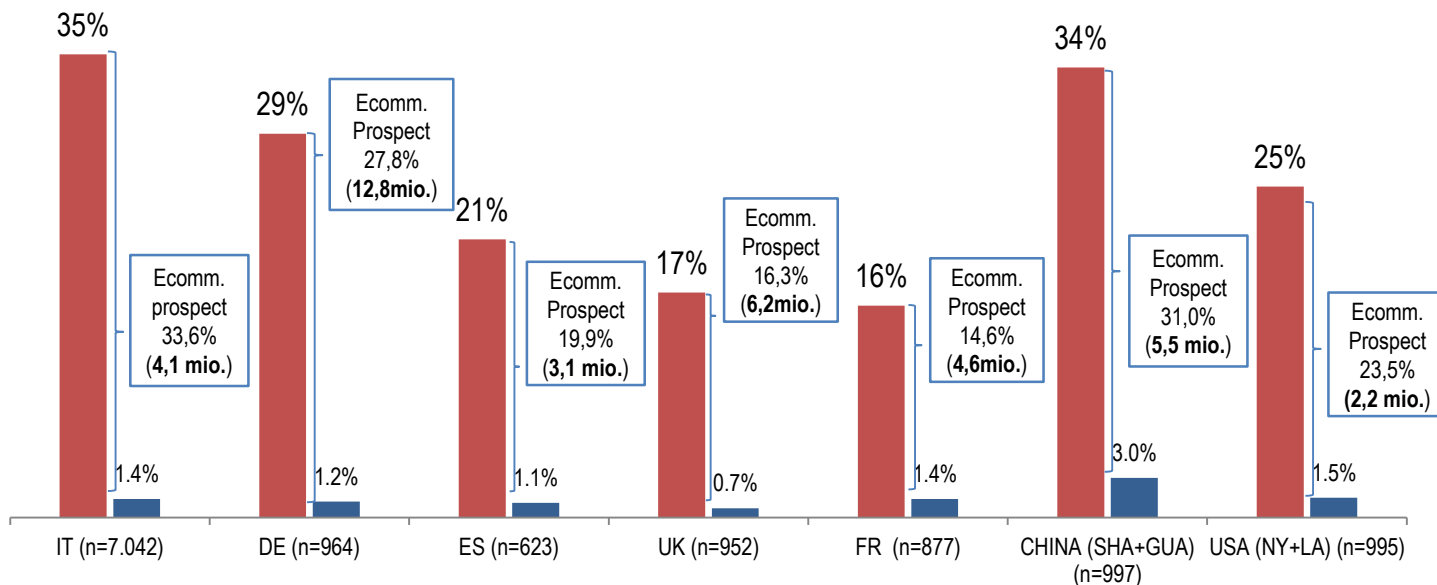
■ Absolutely = 10 ■ '9' ■ '8' ■ '7' ■ '6' ■ '5' ■ '4' ■ '3' ■ '2' ■ '1' ■ Not at all = 0



SWISS ECOMMERCE EXPORT POTENTIAL

Base: users aged 16-65 shopping online in the last 12 months

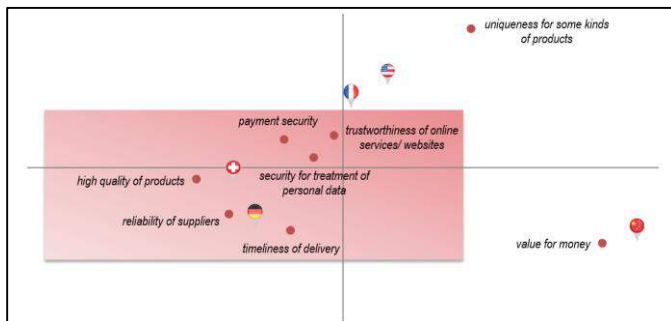
■ Swiss ecommerce attractivity ■ Online shoppers from CH



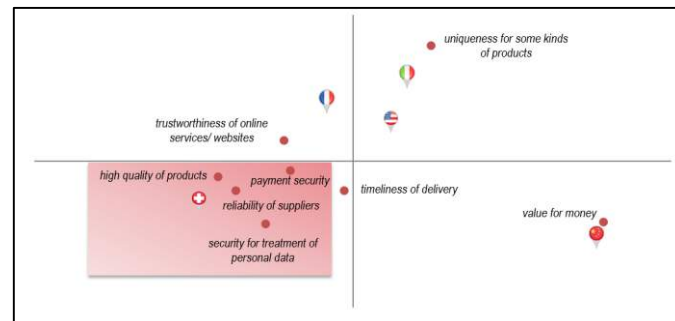
MAP OF ECOMMERCE COUNTRY IMAGE (1/ 2)

Base: users aged 16-65 shopping online promoters of online shopping in Switzerland; correspondence analysis

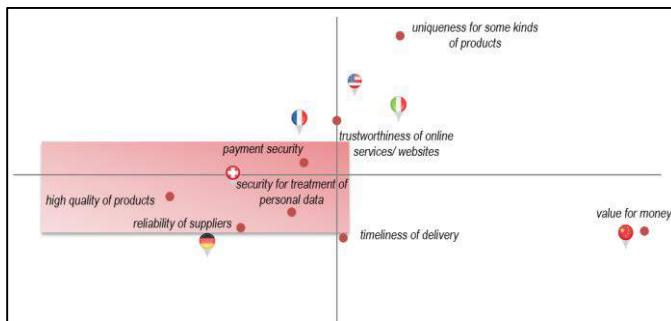
ITALIAN MARKET



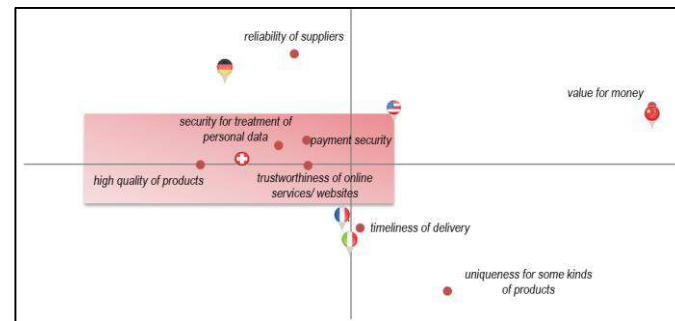
GERMAN MARKET



SPANISH MARKET



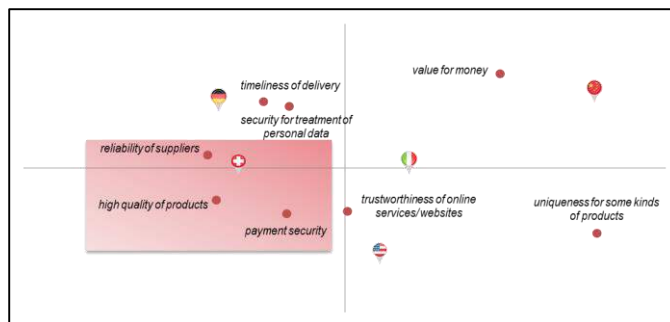
UK MARKET



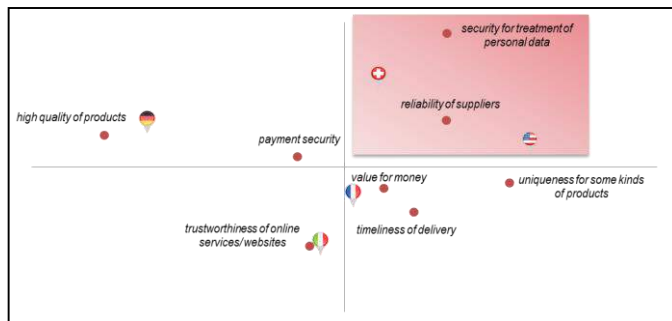
MAP OF ECOMMERCE COUNTRY IMAGE (2/ 2)

Base: users aged 16-65 shopping online promoters of online shopping in Switzerland; correspondence analysis

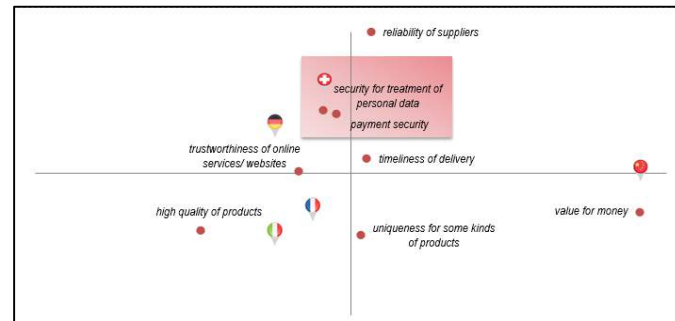
FRENCH MARKET








CHINESE MARKET










US MARKET



























































PROMOTERS OF SWITZERLAND: TOP 10 PRODUCTS CATEGORIES PURCHASED ABROAD

SWISS PROMOTERS (already crossborders)	 IT	 UK	 DE	 FR	 ES	 SHA+GUA	 NY+LA
TOP 10 PRODUCT CATEGORIES PURCHASED ABROAD:	n=1,381 %	n=78 %	n=104 %	n=88 %	n=98 %	n=149 %	n=136 %
Clothing, fashion items	 31	 31	 33	 47	 48	 47	 48
Tech products/ home electronics	 33	 25	 21	 25	 29	 34	 32
CDs, DVDs	 15	 26	 19	 16	 18	 16	 25
Watches, jewelry	 6	 20	 9	 9	 19	 33	 22
Beauty products/cosmetics	 8	 9	 8	 13	 17	 33	 25
Household items	 10	 21	 10	 17	 12	 18	 25
Books (print)	 12	 17	 8	 10	 16	 20	 29
Holiday/ travel	 13	 24	 7	 8	 16	 14	 32
Food, beverages	 5	 13	 6	 8	 7	 25	 29
Sporting equipment	 8	 13	 12	 12	 14	 11	 26



















































































PROMOTERS OF SWITZERLAND: REASONS FOR BUYING ABROAD

							
SWISS PROMOTERS (already crossborders)	IT	UK	DE	FR	ES	SHA+GUA	NY+LA
REASONS FOR BUYING ABROAD:	n=1.381 %	n=78 %	n=104 %	n=88 %	n=98 %	n=149 %	n=136 %
Better price	67	48	54	57	65	50	50
Availability of products/ services	56	50	47	33	46	48	38
Greater selection of products	29	32	21	43	31	38	32
Nicer, better designed foreign sites	7	11	4	8	11	37	21
More reliability of payment methods	6	14	5	9	12	30	23
More guarantees on product delivery	5	15	6	14	7	29	22
Post-sales services (returns, call center, etc.)	6	8	5	3	9	26	23
Better security for treatment of personal info.	3	7	5	6	4	28	17

PROMOTERS OF SWITZERLAND: FAVOURITE ECOMMERCE CHANNELS








SWISS PROMOTERS	 IT	 UK	 DE	 FR	 ES	 SHA+GUA	 NY+LA
FAVOURITE ECOMMERCE CHANNELS	n=2.398 %	n=161 %	n=282 %	n=142 %	n=130 %	n=350 %	n=254 %
Specialized e-site (by type of product or service)	 43	 33	 32	 41	 41	 43	 36
Ecommerce portal (with various product categories)	 49	 26	 36	 39	 39	 46	 32
Flagship brand/ company e-site	 32	 33	 37	 33	 42	 35	 33
Retailer's e-site (also having a store)	 37	 40	 42	 31	 24	 36	 38
Price comparison site	 25	 30	 31	 20	 30	 36	 26
Private sales	 17	 12	 10	 34	 27	 12	 21
Groups/ online couponing	 14	 12	 15	 17	 13	 34	 19

PROMOTERS OF SWITZERLAND: PREFERRED METHODS OF PAYMENT

							
SWISS PROMOTERS	IT	UK	DE	FR	ES	SHA+GUA	NY+LA
PREFERRED METHODS OF PAYMENT	n=2.398 %	n=161 %	n=282 %	n=142 %	n=130 %	n=350 %	n=254 %
Paypal or equivalent	 61	 68	 80	 69	 75	 83	 64
Standard credit card	 25	 48	 23	 57	 34	 24	 53
Bank transfer (online)	 14	 25	 40	 21	 14	 30	 22
Prepaid or rechargeable c.card	 51	 11	 11	 10	 18	 16	 19
Payment on delivery (C.O.D.)	 24	 10	 15	 7	 23	 42	 13
In-store, after reserving online	 11	 12	 11	 9	 14	 17	 20
Sofort/ Direct bank transfer	 6	 16	 32	 6	 4	 18	 10
Bank transfer (in branch)	 2	 5	 14	 7	 14	 24	 13
Invoice	 3	 8	 38	 8	 4	 5	 10
Digital wallet	 5	 9	 2	 3	 3	 24	 19
Post-office issued cheque	 4	 5	 3	 4	 7	 5	 8

PROMOTERS OF SWITZERLAND: SWISS IMAGE FOR ECOMMERCE

Base: users aged 16-65 shopping online; %

SWISS PROMOTERS	 IT n=2.398 %	 UK n=161 %	 DE n=282 %	 FR n=142 %	 ES n=130 %	 SHA+GUA n=350 %	 NY+LA n=254 %
High quality of products	48	59	66	54	59	53	53
Trustworthiness of online services/ websites	46	56	63	54	42	48	54
Payment security	36	47	50	41	51	37	40
Timeliness of delivery	41	42	43	40	46	41	37
Reliability of suppliers	33	30	40	30	29	29	20
Security for treatment of personal data	27	33	34	23	33	35	26
Uniqueness for some kinds of products	19	33	31	21	33	35	31
Value for money	16	24	19	27	19	41	33



SWISS FACTOR IN THE GERMAN MARKET



CROSSBORDER SHOPPERS FROM THE GERMAN MARKET

Base: users aged 16-65 shopping online Germany, n=964; %



Germany

46.200.000 of online shoppers

\$ 66,7 bn spent online yearly

Individuals 16- 65 y.o.

Estimated expenditure
on foreign ecommerce

CROSSBORDER :

14.800.000

(32% of total online shoppers)

\$ 4,8 bn

(16% of total expenditure)



580.000 buyers on Swiss sites

(4% of total crossborders)

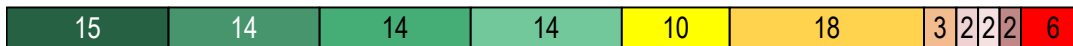


SWISS PROMOTERS IN GERMANY

Base: users aged 16-65 shopping online Germany, n=964; %

How strongly would you recommend buying a product online from a site based in Switzerland?

■ Absolutely = 10 ■ '9' ■ '8' ■ '7' ■ '6' ■ '5' ■ '4' ■ '3' ■ '2' ■ '1' ■ Not at all = 0



**PROMOTERS OF
SWITZERLAND 29%**

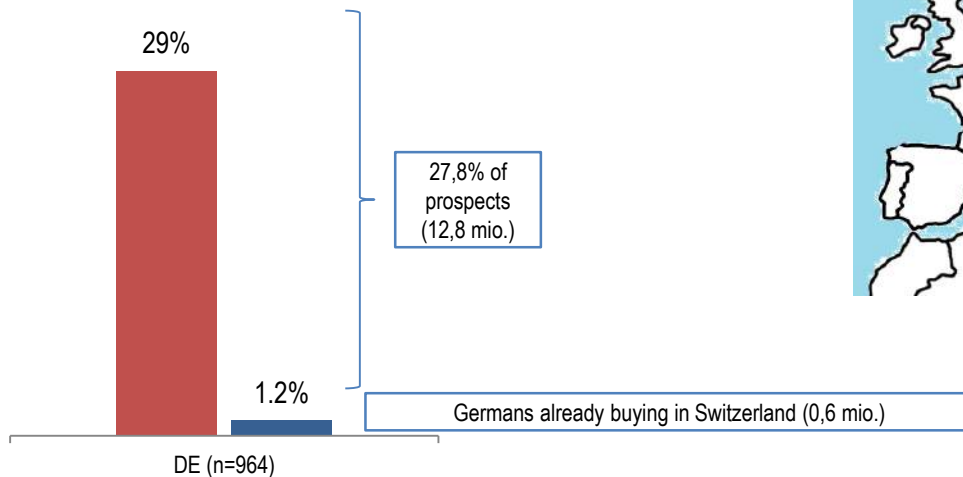
**REJECTORS OF
SWITZERLAND 43%**



SWISS ECOMMERCE EXPORT POTENTIAL IN GERMANY

Base: users aged 16-65 shopping online Germany, n=964

Level of Swiss attractiveness



13.400.000
PROMOTERS OF
SWITZERLAND





PROMOTERS OF SWITZERLAND: PROFILE AND DIGITAL STRATEGY

Base: users aged 16-65 shopping online Germany promoters of online shopping in Switzerland, n=282; %



Germany:
46.200.000 of online shoppers
\$ 66,7 bn spent online yearly

29% of total online shoppers

**13.400.000
PROMOTERS OF
SWITZERLAND**

SOCIODEMO/ PURCHASING RESP. %

Male 60/ Female 40; Avg age = 40

Decision makers:

TECH: 69 FOOD&BEV: 66 AUTOMOTIVE: 61

DIGITAL STRATEGY

Digital ACTIVITIES (weekly freq index)		Digital OWNED MEDIA	
▪ EMAIL reading/ sending	151	▪ NEWSLETTER subscribers	85%
▪ SOCIAL NETWORKING	112	▪ FANPAGE followers	26%
▪ MULTIMEDIA entertainment	83	▪ VIDEOS viewers (last 4 weeks)	45%
▪ ONLINE INFO-COMMERCE	88	▪ QR CODE users (last 4 weeks)	20%
▪ NEWS	118	MOBILE DEVICES	
▪ HOME BANKING	86	▪ TOTAL USERS (smart OR tablet)	70%
▪ ONLINE GAMES	62	• SMARTPHONE users	64%
▪ e-learning, hobby/ sports, place online ad ..., e-gouvernement, etc.	...	• SHOPPERS via smartphone	46%

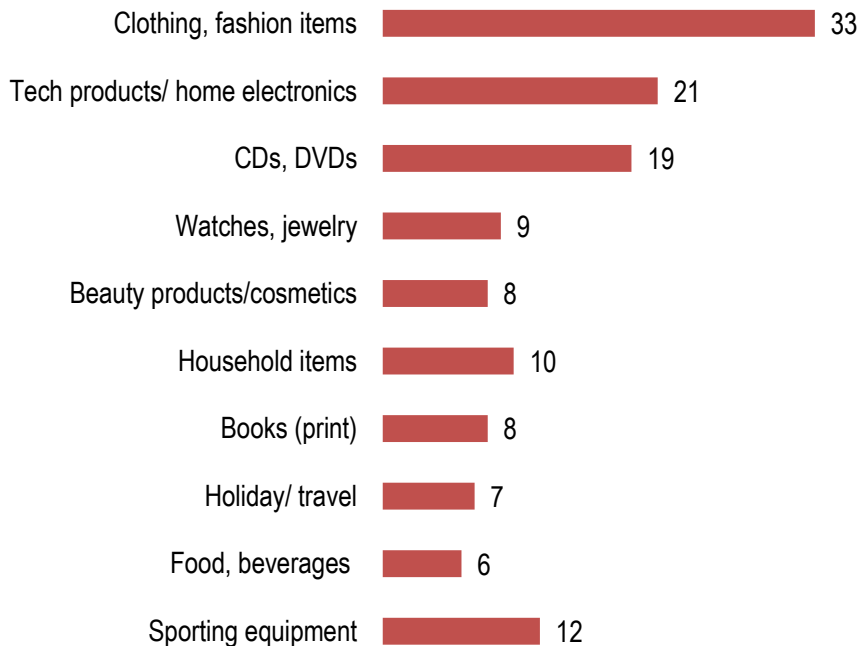
LEVEL OF INTERACTIVITY (0-100):

47



PROMOTERS OF SWITZERLAND: TOP 10 PRODUCT CATEGORIES PURCHASED ABROAD

Base: users aged 16-65 shopping crossborder Germany promoters of online shopping in Switzerland, n=104, %



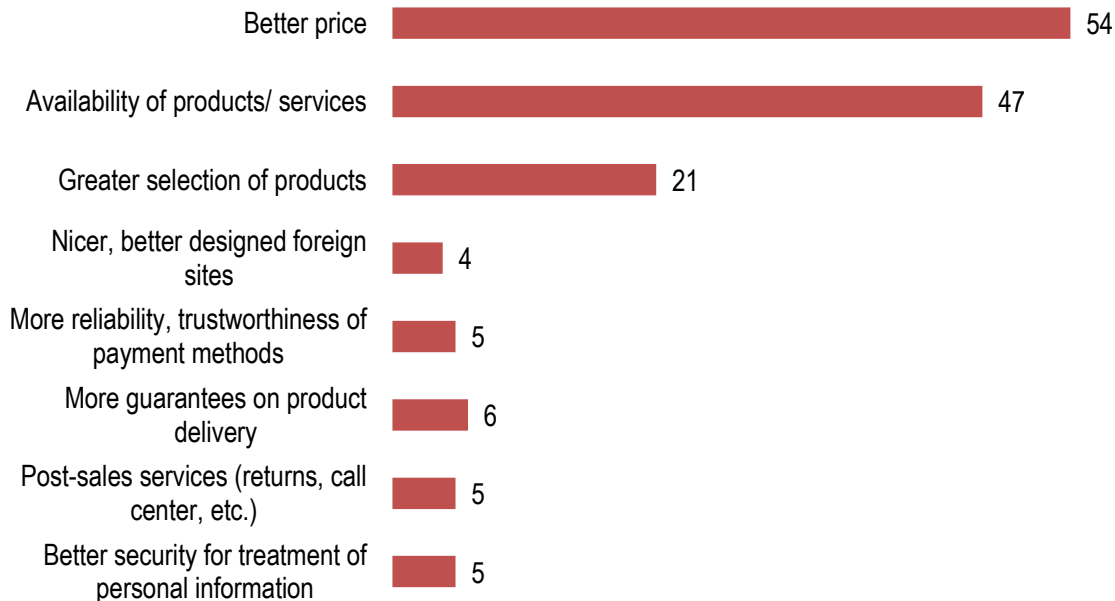
Total online category shopper (locally + abroad), % base: total Swiss prom. (n= 282)	Weighted ratio abroad/ total
80	0,13
39	0,17
39	0,16
21	0,14
32	0,08
28	0,11
36	0,07
24	0,09
24	0,08
18	0,21



PROMOTERS OF SWITZERLAND: REASONS FOR BUYING ABROAD

Base: users aged 16-65 shopping crossborder Germany promoters of online shopping in Switzerland, n=104; %

Why did you choose to buy online through foreign e-commerce sites rather than on national ones?

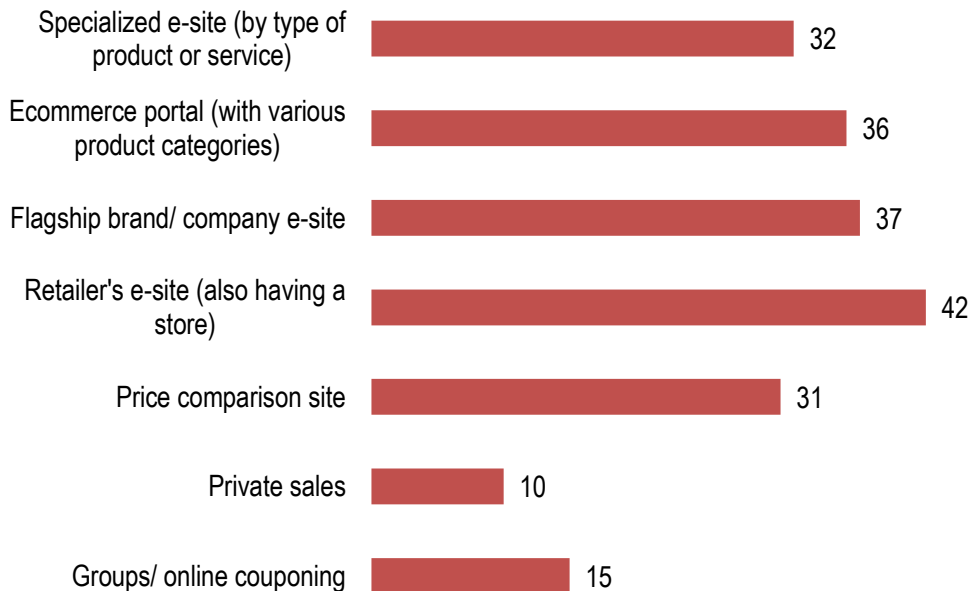




PROMOTERS OF SWITZERLAND: FAVOURITE ECOMMERCE CHANNELS

Base: users aged 16-65 shopping online Germany promoters of online shopping in Switzerland, n=282; %

Generally speaking as regards online shopping, which are your favourite ecommerce channels?

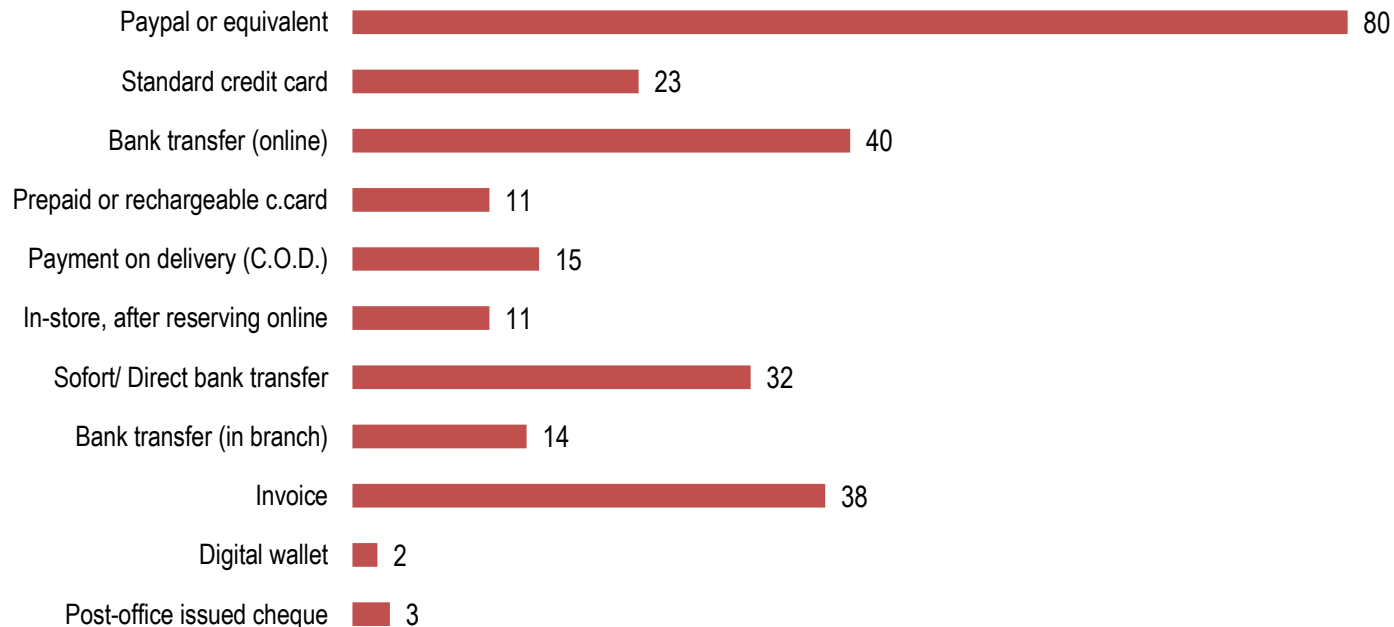




PROMOTERS OF SWITZERLAND: PREFERRED METHODS OF PAYMENT

Base: users aged 16-65 shopping online Germany promoters of online shopping in Switzerland, n=282; %

In the case of online purchases, what modes of payment do you prefer or would you prefer to use?

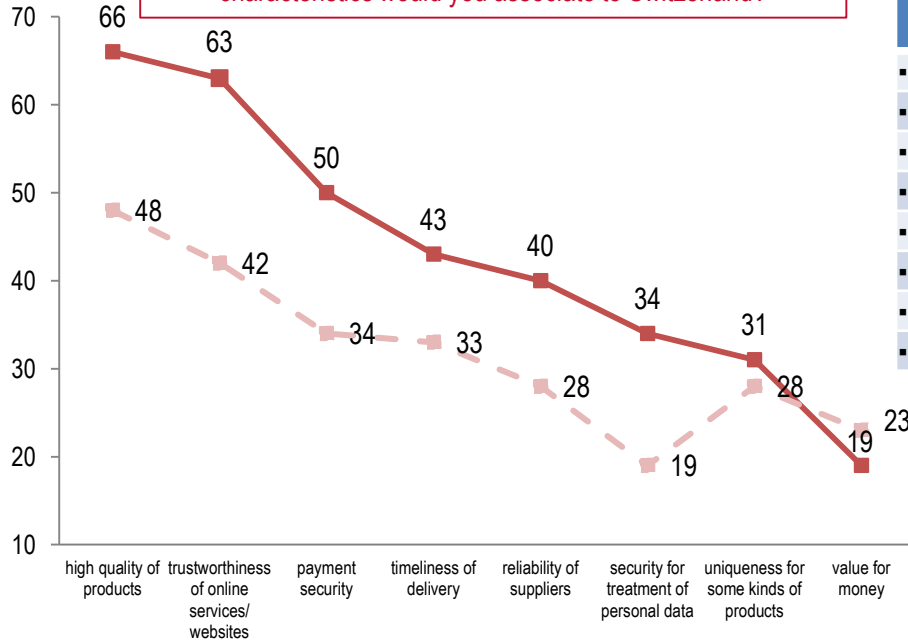




PROMOTERS OF SWITZERLAND: SWISS IMAGE FOR ECOMMERCE

Base: users aged 16-65 Germany; %

Thinking about online shopping, which of the following characteristics would you associate to Switzerland?



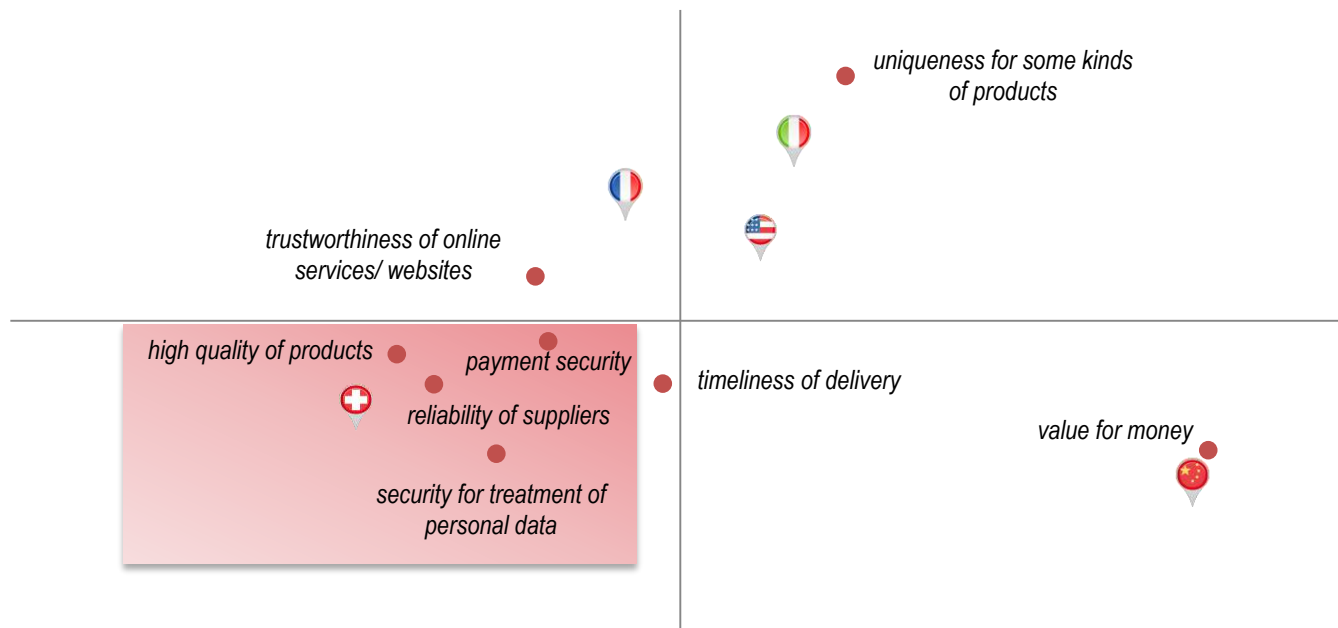
Benchmark values (excluded own country)	Country Image in Germany		International benchmarks			
	CH	Avg 5	Avg value	Top value	Top country	2nd
high quality of products	66	38	43	65	DE	CH
trustworthiness of online	63	44	47	58	DE	CH
payment security	50	36	35	43	CH	DE
timeliness of delivery	43	33	35	45	DE	CH
reliability of suppliers	40	26	22	32	DE	CH
security for treat. of personal data	34	21	23	30	CH	DE
uniqueness .. of products	31	38	33	40	US	ITA
value for money	19	37	36	56	CN	US

—■— online shoppers promoters of Switzerland n=282
 - - ■ - - crossborder online shoppers n=286



MAP OF ECOMMERCE COUNTRY IMAGE

Base: users aged 16-65 shopping online Germany promoters of online shopping in Switzerland, n=282; correspondence analysis





SWISS FACTOR IN THE ITALIAN MARKET




CROSSBORDER SHOPPERS FROM THE ITALIAN MARKET

Base: users aged 16-65 shopping online Italy, n=7.042; %



ITALY:
12.400.000 of online shoppers
\$ 16,5 bn spent online yearly

	Individuals 16- 65 y.o.	Estimated expenditure on foreign ecommerce
CROSSBORDER :	7.200.000 (58% of total online shoppers)	\$ 3,1 bn (25% of total expenditure)
	 180.000 buyers on Swiss sites (3% of total crossborders)	



SWISS PROMOTERS IN ITALY

Base: users aged 16-65 shopping online Italy, n=7.042; %

How strongly would you recommend buying a product online from a site based in Switzerland?

■ Absolutely = 10 ■ '9' ■ '8' ■ '7' ■ '6' ■ '5' ■ '4' ■ '3' ■ '2' ■ '1' ■ Not at all = 0



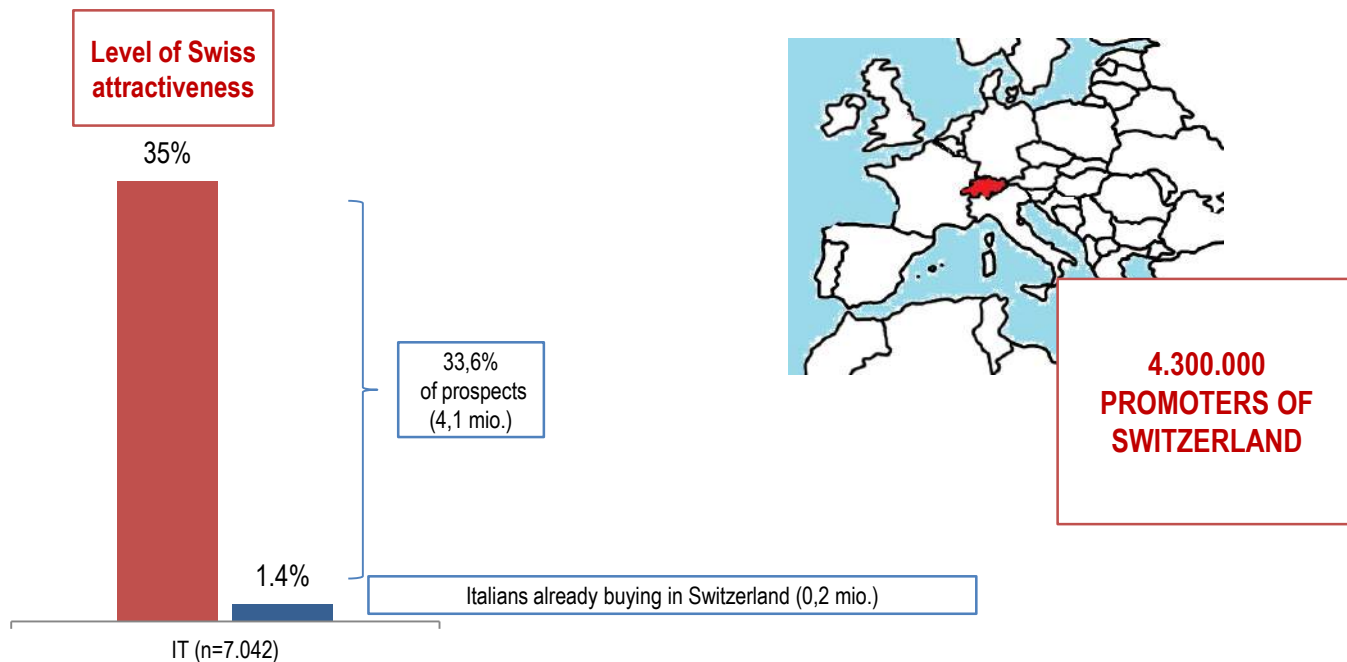
**PROMOTERS OF
SWITZERLAND 35%**

**REJECTORS OF
SWITZERLAND 32%**



SWISS ECOMMERCE EXPORT POTENTIAL IN ITALY

Base: users aged 16-65 shopping online Italy, n=7.042



PROMOTERS OF SWITZERLAND: PROFILE AND DIGITAL STRATEGY

Base: users aged 16-65 shopping online Italy promoters of online shopping in Switzerland, n=2.398; %



Italy:
12.400.000 of online shoppers.
\$ 16,5 bn spent online yearly

35% of total online shoppers

**4.300.000
PROMOTERS OF
SWITZERLAND**

SOCIODEMO/ PURCHASING RESP. %

Male 60/ Female 40; Avg age = 37

Decision makers:

TECH: 65 FOOD&BEV: 42 AUTOMOTIVE: 42

DIGITAL STRATEGY

Digital ACTIVITIES (weekly freq index)		Digital OWNED MEDIA	
▪ EMAIL reading/ sending	144	▪ NEWSLETTER subscribers	91%
▪ SOCIAL NETWORKING	113	▪ FANPAGE followers	29%
▪ MULTIMEDIA entertainment	92	▪ VIDEOS viewers (last 4 weeks)	49%
▪ ONLINE INFO-COMMERCE	109	▪ QR CODE users (last 4 weeks)	16%
▪ NEWS	128	MOBILE DEVICES	
▪ HOME BANKING	69	▪ TOTAL USERS (smart OR tablet)	77%
▪ ONLINE GAMES	45	• SMARTPHONE users	71%
▪ e-learning, hobby/ sports, place online ad ..., e-gouvernement, etc.	...	• SHOPPERS via smartphone	49%

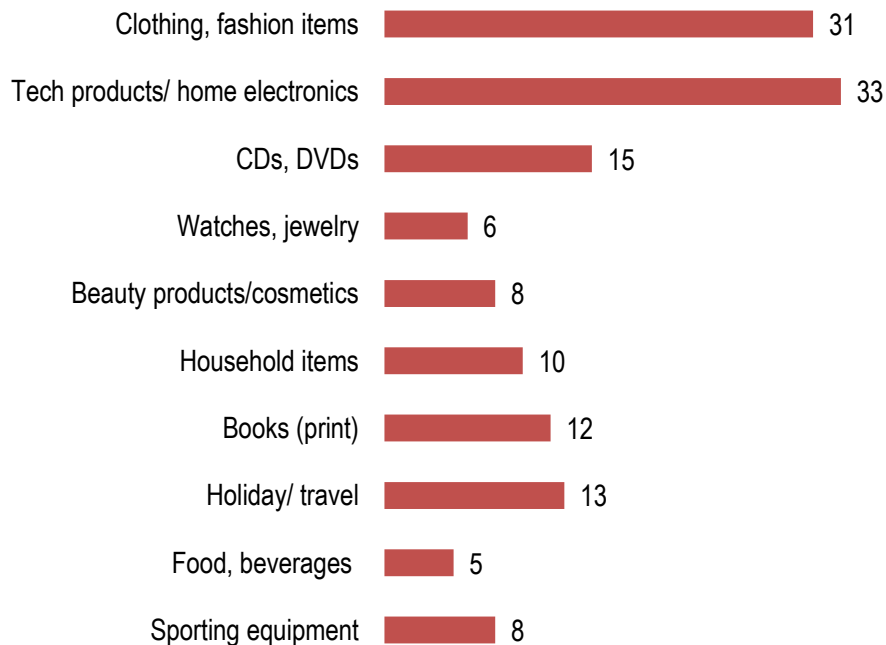
LEVEL OF INTERACTIVITY (0-100):

46



PROMOTERS OF SWITZERLAND: TOP 10 PRODUCT CATEGORIES PURCHASED ABROAD

Base: users aged 16-65 shopping crossborder Italy promoters of online shopping in Switzerland, n=1.381; %

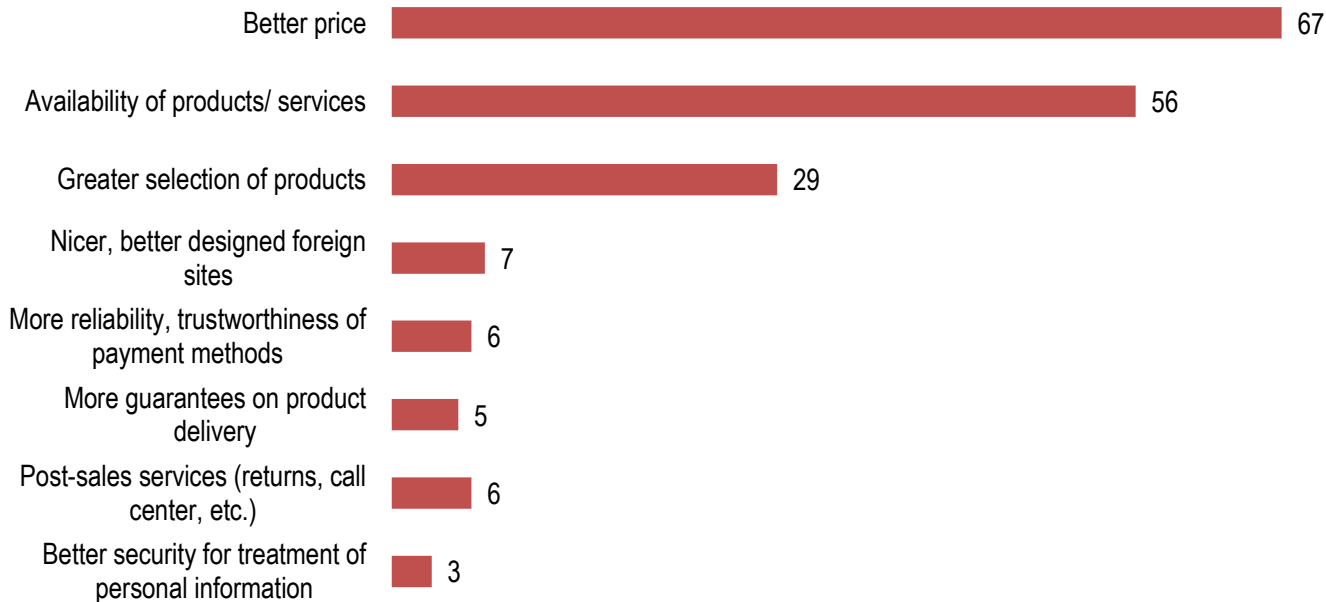


Total online category shopper (locally + abroad), % base: total Swiss prom. (n= 2.398)	Weighted ratio abroad/ total
50	0,36
38	0,50
22	0,40
10	0,35
18	0,26
23	0,25
31	0,22
22	0,34
15	0,19
16	0,29

PROMOTERS OF SWITZERLAND: REASONS FOR BUYING ABROAD

Base: users aged 16-65 shopping crossborder Italy promoters of online shopping in Switzerland, n=1.381; %

Why did you choose to buy online through foreign e-commerce sites rather than on national ones?

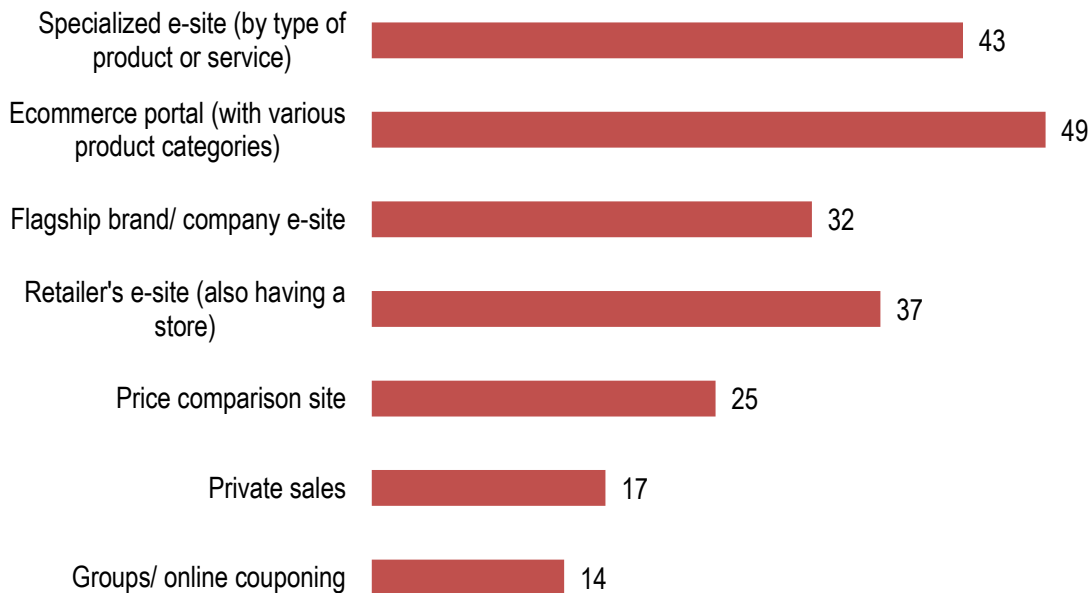




PROMOTERS OF SWITZERLAND: FAVOURITE ECOMMERCE CHANNELS

Base: users aged 16-65 shopping online Italy promoters of online shopping in Switzerland, n=2.398; %

Generally speaking as regards online shopping, which are your favourite ecommerce channels?

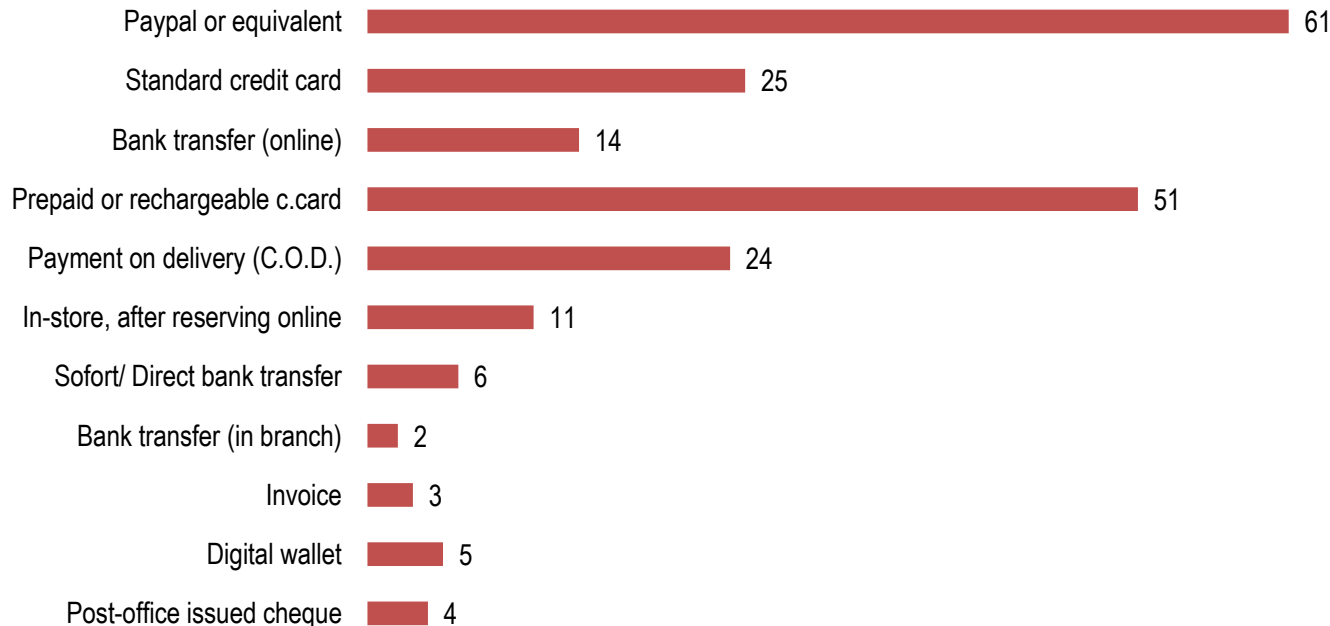




PROMOTERS OF SWITZERLAND: PREFERRED METHODS OF PAYMENT

Base: users aged 16-65 shopping online Italy promoters of online shopping in Switzerland, n=2.398; %

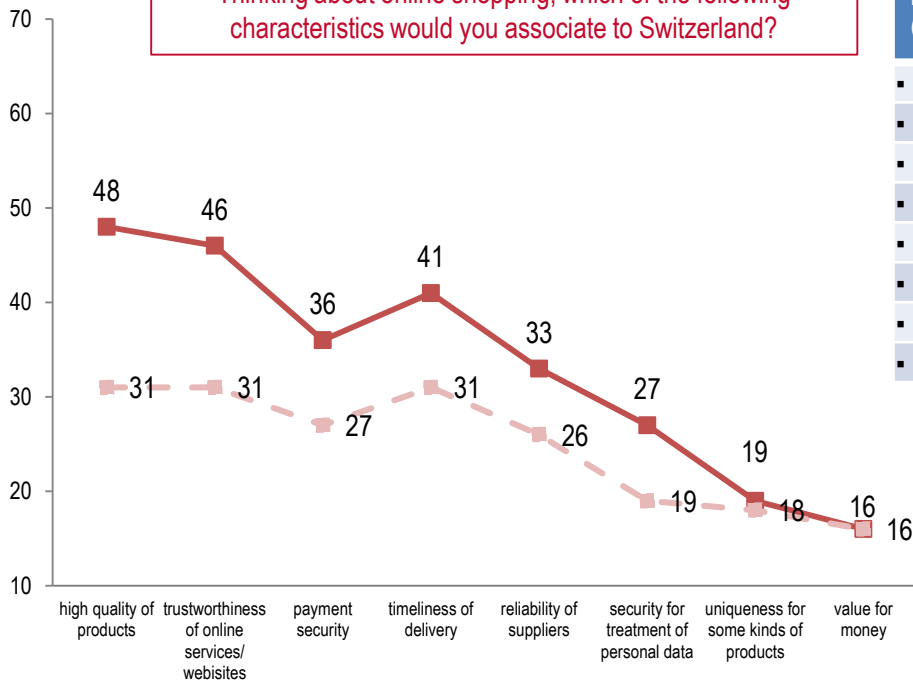
In the case of online purchases, what modes of payment do you prefer or would you prefer to use?



PROMOTERS OF SWITZERLAND: SWISS IMAGE FOR ECOMMERCE

Base: users aged 16-65 Italy, %

Thinking about online shopping, which of the following characteristics would you associate to Switzerland?



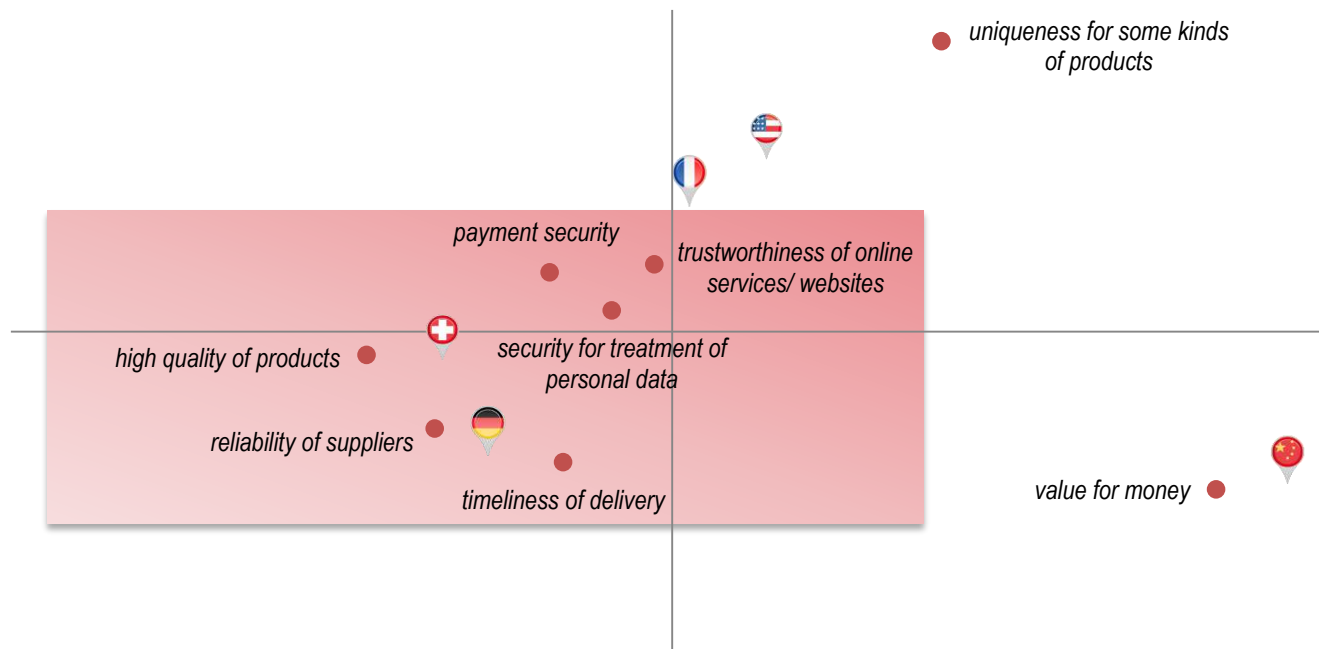
Benchmark values (excluded own country)	Country Image in Italy		International benchmarks			
	CH	Avg 5	Avg value	Top value	Top country	2nd
high quality of products	48	33	43	65	DE	CH
trustworthiness of online	46	44	47	58	DE	CH
payment security	36	28	35	43	CH	DE
timeliness of delivery	41	32	35	45	DE	CH
reliability of suppliers	33	22	22	32	DE	CH
security for treat. of personal data	27	21	23	30	CH	DE
uniqueness .. of products	19	24	33	40	US	ITA
value for money	16	32	36	56	CN	US

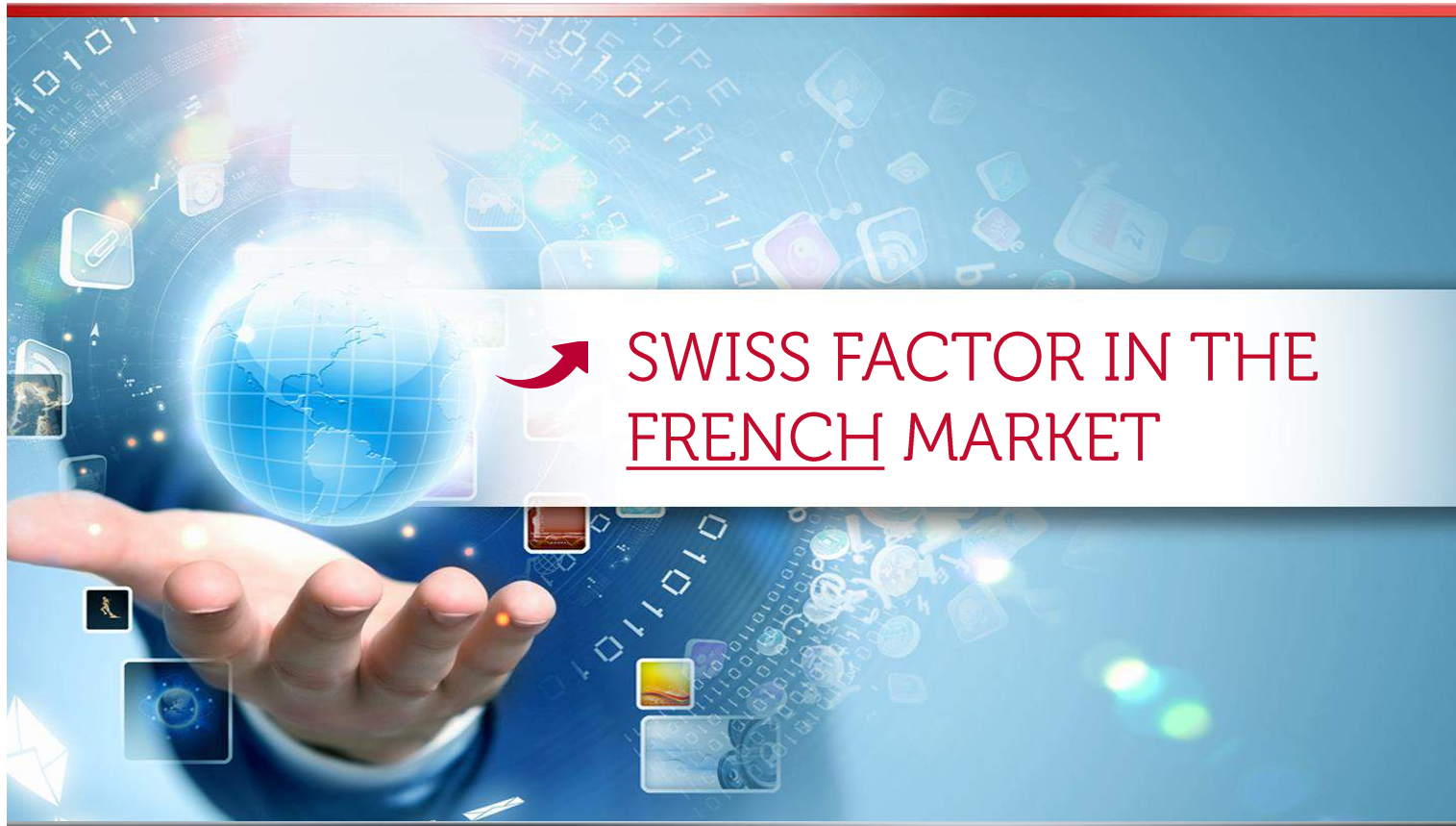
—■— online shoppers promoters of Switzerland n=2.398
 - - ■ - - crossborder online shoppers n=3.734



MAP OF ECOMMERCE COUNTRY IMAGE

Base: users aged 16-65 shopping online Italy promoters of online shopping in Switzerland, n=2.398; correspondence analysis





SWISS FACTOR IN THE FRENCH MARKET



CROSSBORDER SHOPPERS FROM THE FRENCH MARKET

Base: users aged 16-65 shopping online France, n=877, %



France

31.200.000 of online shoppers

\$ 31,5 bn spent online yearly

Individuals 16- 65 y.o.

Estimated expenditure
on foreign ecommerce

CROSSBORDER :

15.300.000

(49% of total online shoppers)

\$ 4,3 bn

(21% of total expenditure)



430.000 buyers on Swiss sites

(3% of total crossborders)

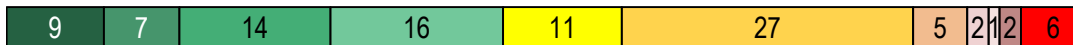


SWISS PROMOTERS IN FRANCE

Base: users aged 16-65 shopping online France, n=877; %

How strongly would you recommend buying a product online from a site based in Switzerland?

■ Absolutely = 10 ■ '9' ■ '8' ■ '7' ■ '6' ■ '5' ■ '4' ■ '3' ■ '2' ■ '1' ■ Not at all = 0



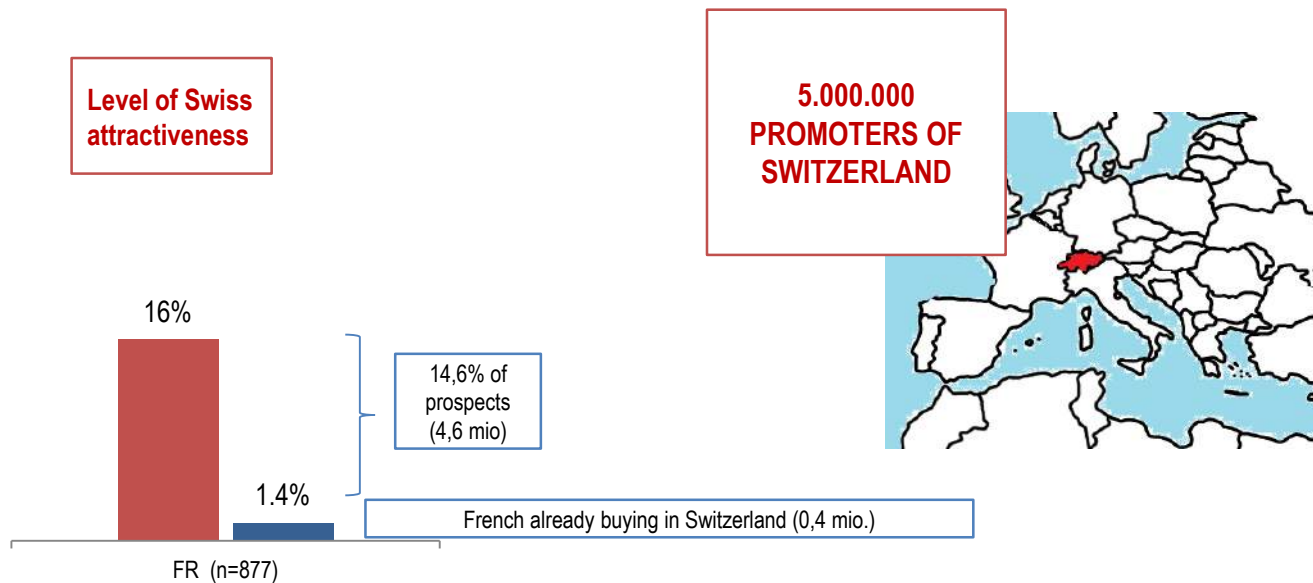
**PROMOTERS OF
SWITZERLAND 16%**

**REJECTORS OF
SWITZERLAND 54%**



SWISS ECOMMERCE EXPORT POTENTIAL IN FRANCE

Base: users aged 16-65 shopping online France, n=997, %





PROMOTERS OF SWITZERLAND: PROFILE AND DIGITAL STRATEGY

Base: users aged 16-65 shopping online France promoters of online shopping in Switzerland, n=142;%



France:
31.200.000 of online shoppers
\$ 31,5 bn spent online yearly

16% of total online shoppers

**5.000.000
PROMOTERS OF
SWITZERLAND**

SOCIODEMO/ PURCHASING RESP. %

Male 59/ Female 41; Avg age = 36

Decision makers:

TECH: 70 FOOD&BEV: 72 AUTOMOTIVE: 63

DIGITAL STRATEGY

Digital ACTIVITIES (weekly freq index)		Digital OWNED MEDIA	
▪ EMAIL reading/ sending	144	▪ NEWSLETTER subscribers	87%
▪ SOCIAL NETWORKING	120	▪ FANPAGE followers	49%
▪ MULTIMEDIA entertainment	97	▪ VIDEOS viewers (last 4 weeks)	53%
▪ ONLINE INFO-COMMERCE	87	▪ QR CODE users (last 4 weeks)	26%
▪ NEWS	112	MOBILE DEVICES	
▪ HOME BANKING	70	▪ TOTAL USERS (smart OR tablet)	71%
▪ ONLINE GAMES	69	• SMARTPHONE users	63%
▪ e-learning, hobby/ sports, place online ad ..., e-gouvernement, etc.	...	• SHOPPERS via smartphone	41%

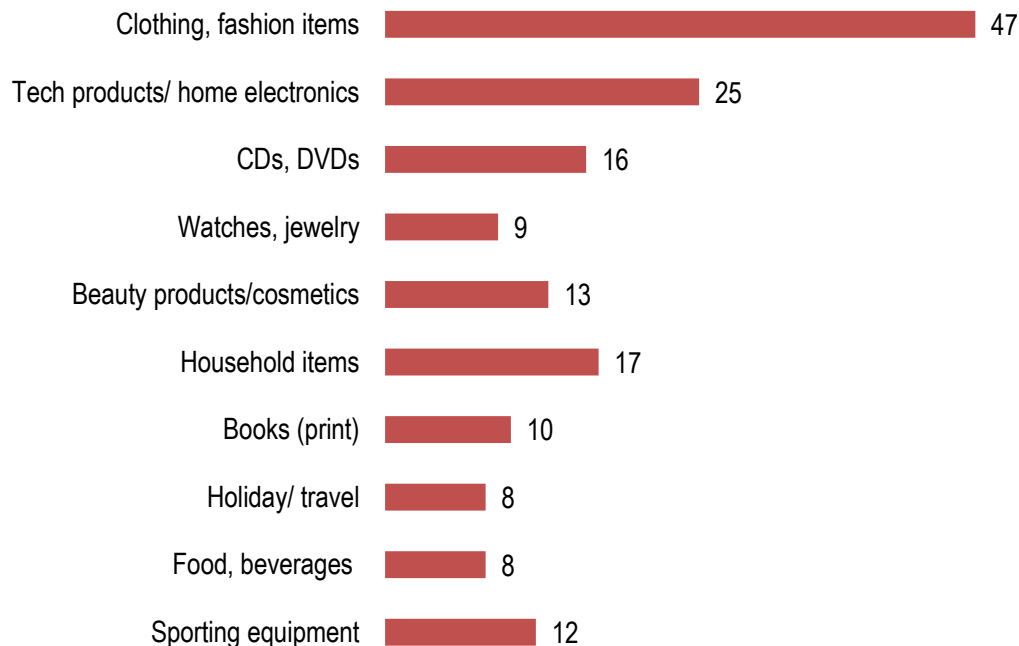
LEVEL OF INTERACTIVITY (0-100):

51



PROMOTERS OF SWITZERLAND: TOP 10 PRODUCT CATEGORIES PURCHASED ABROAD

Base: users aged 16-65 shopping crossborder France promoters of online shopping in Switzerland, n=88; %



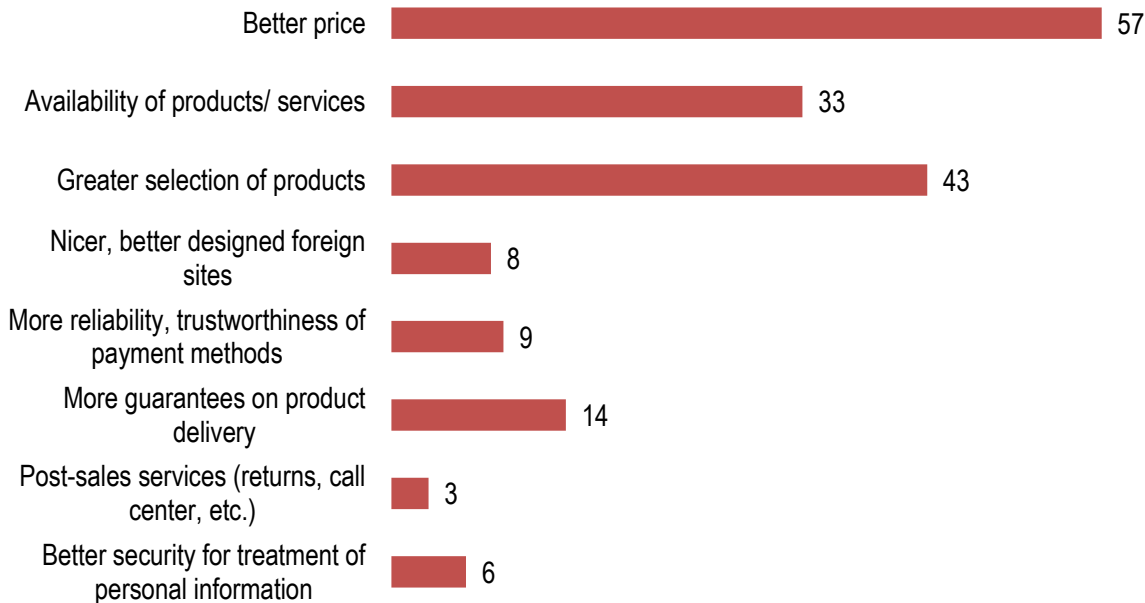
Total online category shopper (locally + abroad), % base: total Swiss prom. (n=142)	Weighted ratio abroad/ total
67	0,34
29	0,42
23	0,34
24	0,18
37	0,17
23	0,36
27	0,18
20	0,20
25	0,16
21	0,28



PROMOTERS OF SWITZERLAND: REASONS FOR BUYING ABROAD

Base: users aged 16-65 shopping crossborder France promoters of online shopping in Switzerland, n=88; %

Why did you choose to buy online through foreign e-commerce sites rather than on national ones?

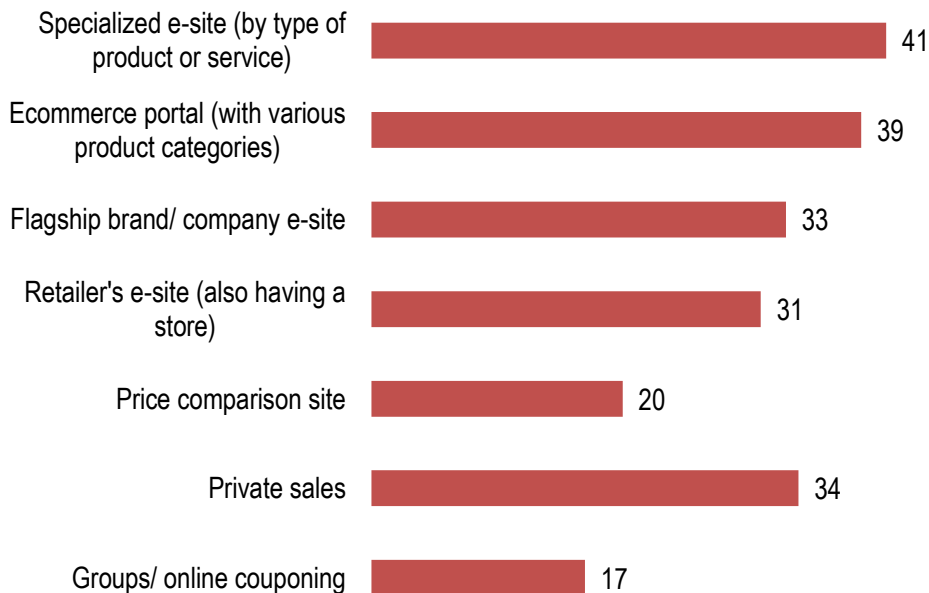




PROMOTERS OF SWITZERLAND: FAVOURITE ECOMMERCE CHANNELS

Base: users aged 16-65 shopping online France promoters of online shopping in Switzerland, n=142; %

Generally speaking as regards online shopping, which are your favourite ecommerce channels?

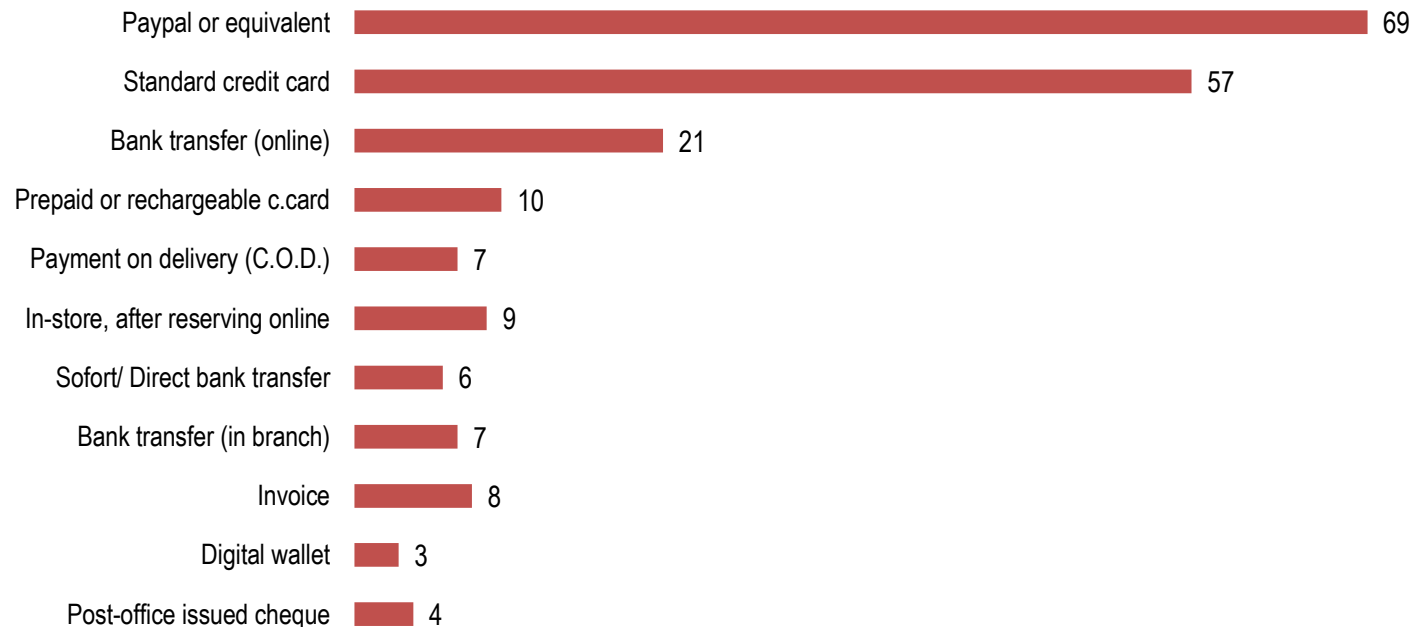




PROMOTERS OF SWITZERLAND: PREFERRED METHODS OF PAYMENT

Base: users aged 16-65 shopping online France promoters of online shopping in Switzerland, n=142; %

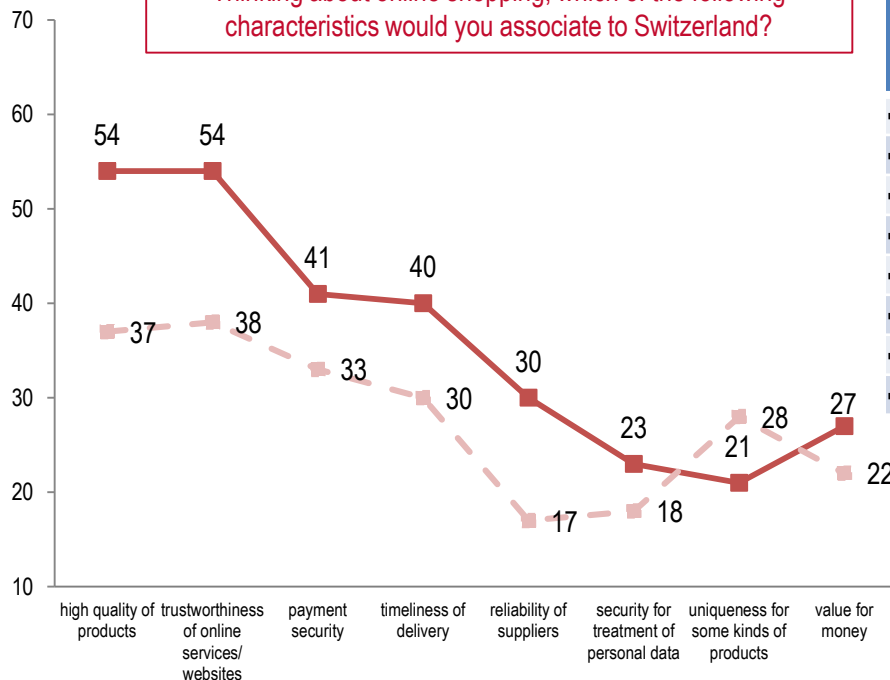
In the case of online purchases, what modes of payment do you prefer or would you prefer to use?



PROMOTERS OF SWITZERLAND: SWISS IMAGE FOR ECOMMERCE

Base: users aged 16-65 France; %

Thinking about online shopping, which of the following characteristics would you associate to Switzerland?



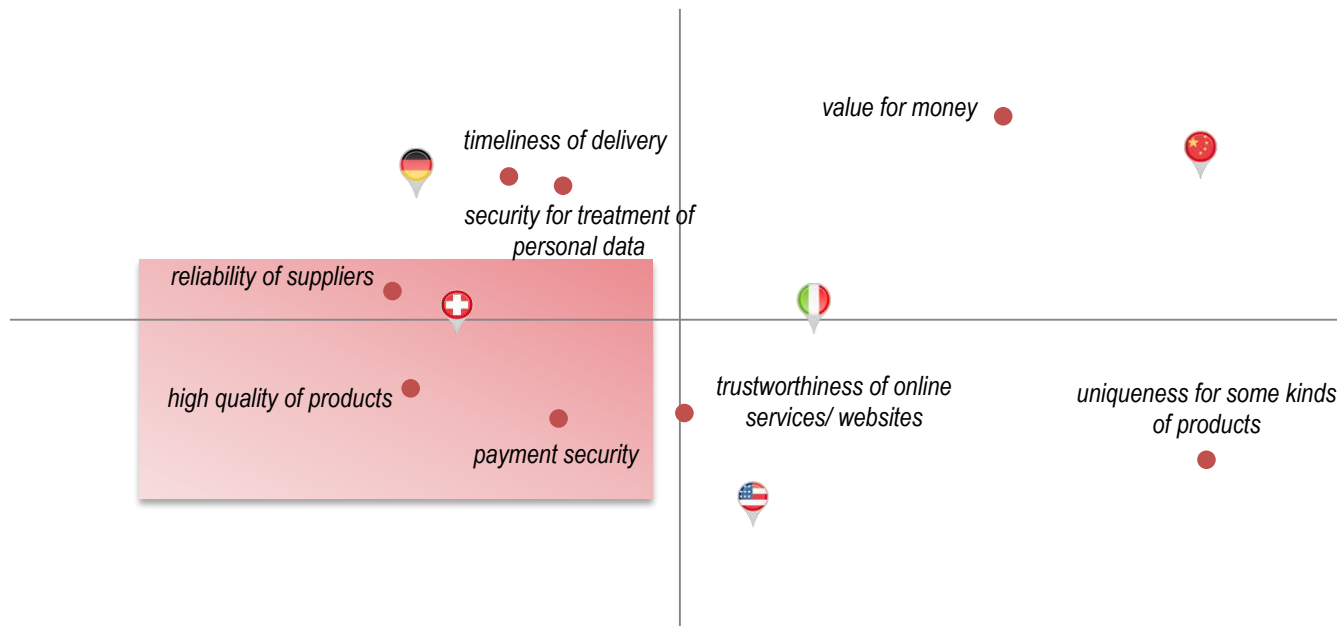
Benchmark values (excluded own country)	Country Image in France		International benchmarks			
	CH	Avg 5	Avg value	Top value	Top country	2nd
high quality of products	54	40	43	65	DE	CH
trustworthiness of online	54	51	47	58	DE	CH
payment security	41	33	35	43	CH	DE
timeliness of delivery	40	31	35	45	DE	CH
reliability of suppliers	30	22	22	32	DE	CH
security for treat. of personal data	23	18	23	30	CH	DE
uniqueness .. of products	21	31	33	40	US	ITA
value for money	27	37	36	56	CN	US

—■— online shoppers promoters of Switzerland n=142
 - - ■ - - crossborder online shoppers n=385



MAP OF ECOMMERCE COUNTRY IMAGE

Base: users aged 16-65 shopping online France promoters of online shopping in Switzerland, n=142; correspondence analysis





SWISS FACTOR IN THE SPANISH MARKET



CROSSBORDER SHOPPERS FROM THE SPANISH MARKET

Base: users aged 16-65 shopping online Spain, n=623; %



Spain

15.500.000 of online shoppers

\$ 18,0 bn spent online yearly

Individuals 16- 65 y.o.

Estimated expenditure
on foreign ecommerce

CROSSBORDER :

10.300.000

(66% of total online shoppers)

\$ 4,8 bn

(34% of total expenditure)



170.000 buyers on Swiss sites

(2% of total crossborders)



SWISS PROMOTERS IN SPAIN

Base: users aged 16-65 shopping online Spain, n=623;%

How strongly would you recommend buying a product online from a site based in Switzerland?

■ Absolutely = 10 ■ '9' ■ '8' ■ '7' ■ '6' ■ '5' ■ '4' ■ '3' ■ '2' ■ '1' ■ Not at all = 0



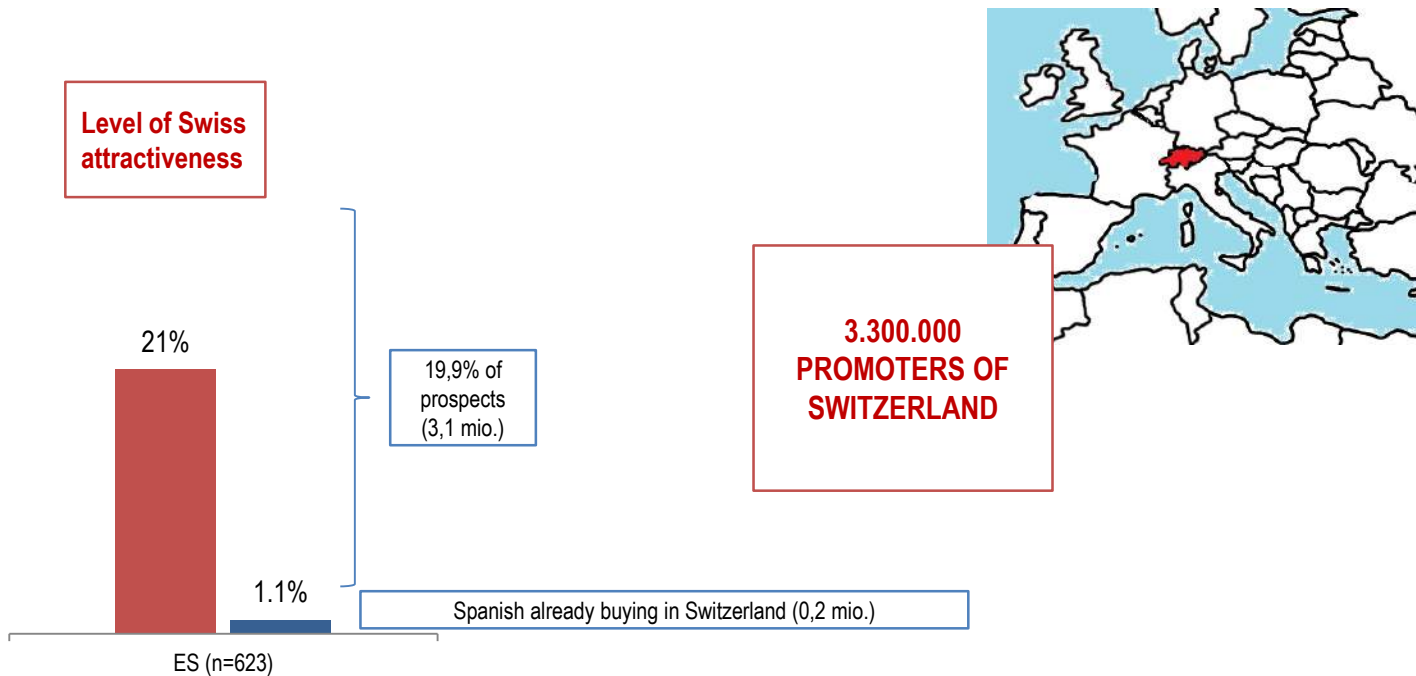
**PROMOTERS OF
SWITZERLAND 21%**

**REJECTORS OF
SWITZERLAND 45%**



SWISS ECOMMERCE EXPORT POTENTIAL IN SPAIN

Base: users aged 16-65 shopping online Spain, n=623



PROMOTERS OF SWITZERLAND: PROFILE AND DIGITAL STRATEGY

Base: users aged 16-65 shopping online Spain promoters of online shopping in Switzerland, n=130;%



Spain:
15.500.000 of online shoppers
\$ 18,0 bn spent online yearly

21% of total online shoppers

**3.300.000
PROMOTERS OF
SWITZERLAND**

SOCIODEMO/ PURCHASING RESP. %

Male 53/ Female 47; Avg age = 37

Decision makers:

TECH: 71 FOOD&BEV: 69 AUTOMOTIVE: 60

DIGITAL STRATEGY

Digital ACTIVITIES (weekly freq index)		Digital OWNED MEDIA	
▪ EMAIL reading/ sending	136	▪ NEWSLETTER subscribers	76%
▪ SOCIAL NETWORKING	123	▪ FANPAGE followers	55%
▪ MULTIMEDIA entertainment	94	▪ VIDEOS viewers (last 4 weeks)	62%
▪ ONLINE INFO-COMMERCE	83	▪ QR CODE users (last 4 weeks)	24%
▪ NEWS	111	MOBILE DEVICES	
▪ HOME BANKING	78	▪ TOTAL USERS (smart OR tablet)	77%
▪ ONLINE GAMES	76	• SMARTPHONE users	75%
▪ e-learning, hobby/ sports, place online ad ..., e-gouvernement, etc.	...	• SHOPPERS via smartphone	55%

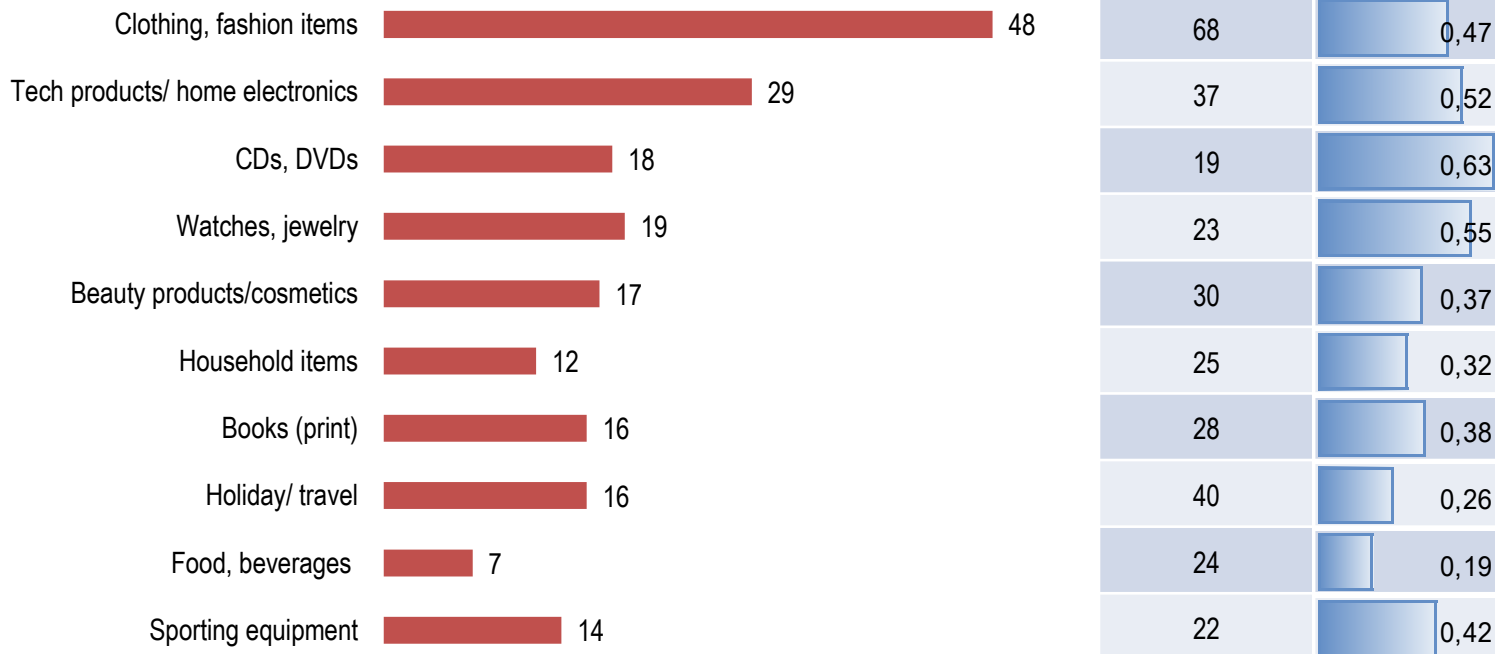
LEVEL OF INTERACTIVITY (0-100):

57



PROMOTERS OF SWITZERLAND: TOP 10 PRODUCT CATEGORIES PURCHASED ABROAD

Base: users aged 16-65 shopping crossborder Spain promoters of online shopping in Switzerland, n=98;%

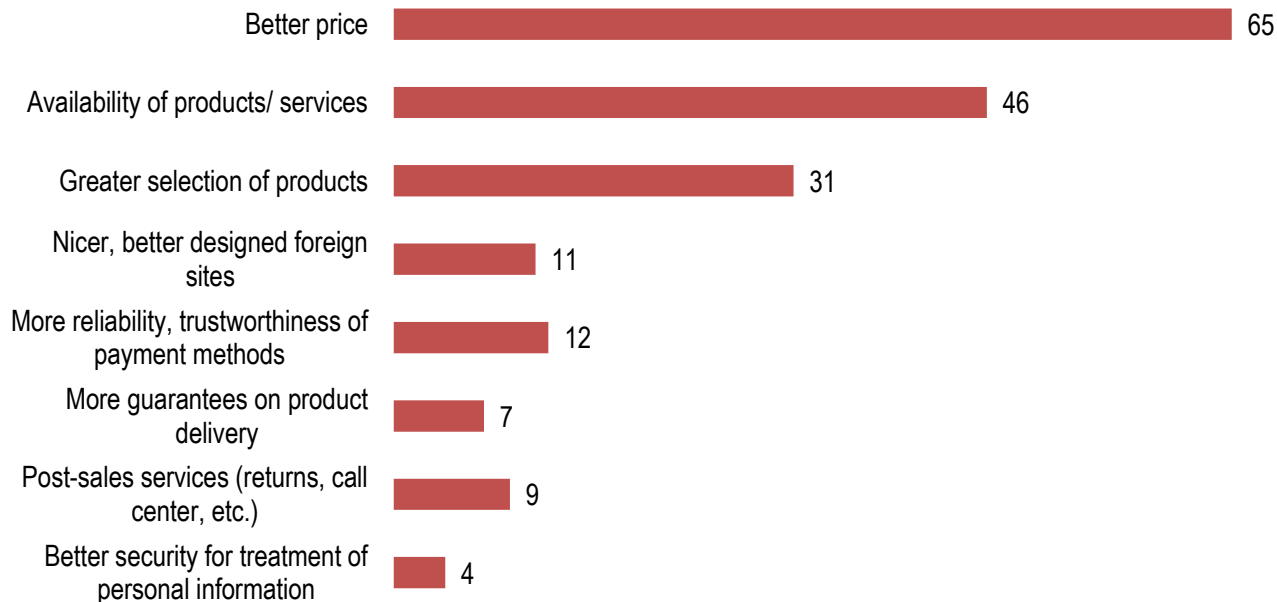




PROMOTERS OF SWITZERLAND: REASONS FOR BUYING ABROAD

Base: users aged 16-65 shopping crossborder Spain promoters of online shopping in Switzerland, n=98;%

Why did you choose to buy online through foreign e-commerce sites rather than on national ones?

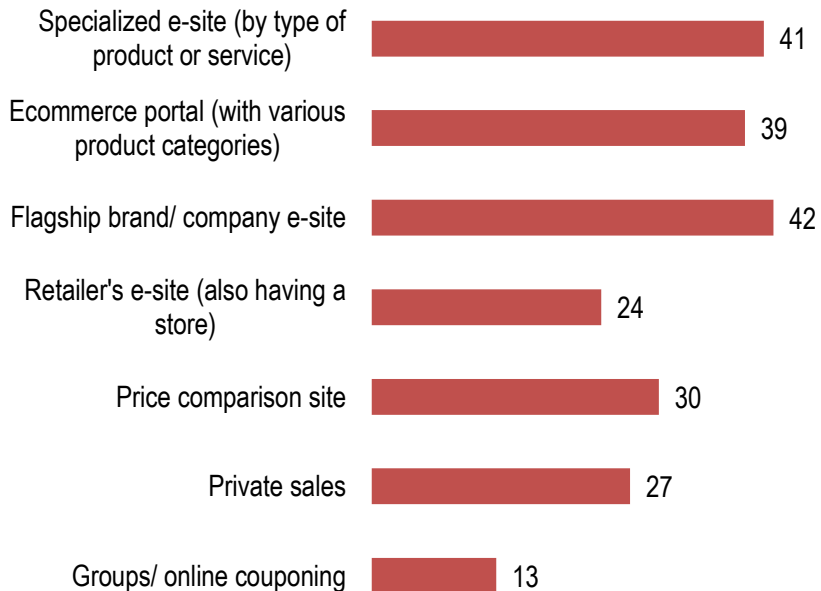




PROMOTERS OF SWITZERLAND: FAVOURITE ECOMMERCE CHANNELS

Base: users aged 16-65 shopping online Spain promoters of online shopping in Switzerland, n=130; %

Generally speaking as regards online shopping, which are your favourite ecommerce channels?

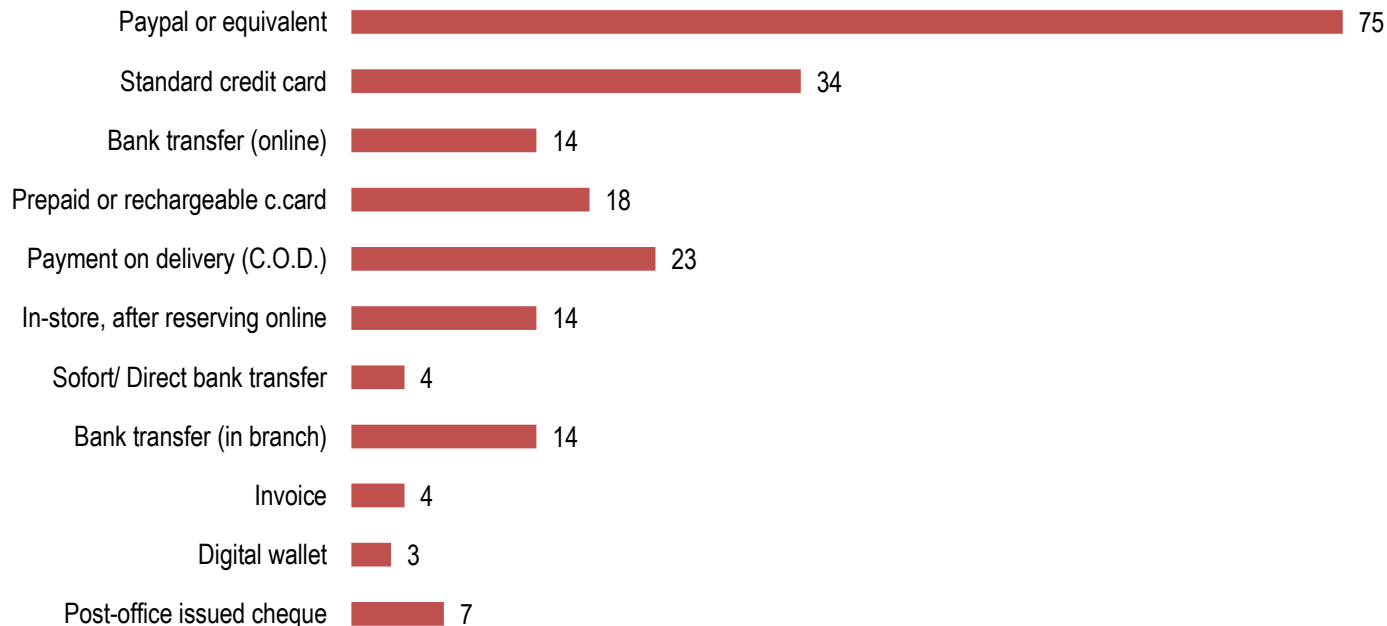




PROMOTERS OF SWITZERLAND: PREFERRED METHODS OF PAYMENT

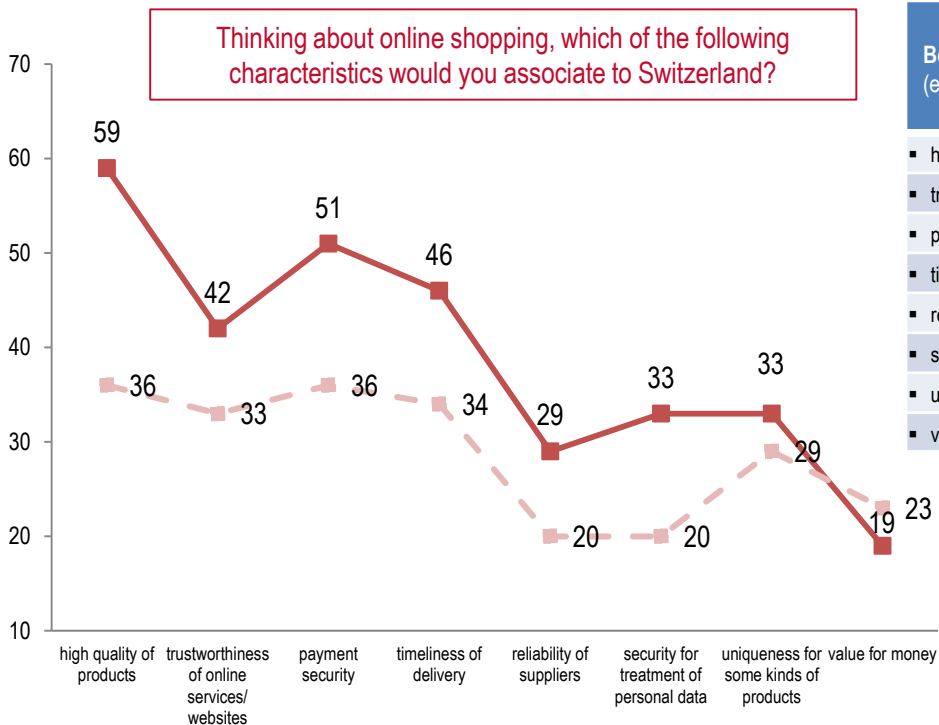
Base: users aged 16-65 shopping online Spain promoters of online shopping in Switzerland, n=130; %

In the case of online purchases, what modes of payment do you prefer or would you prefer to use?



PROMOTERS OF SWITZERLAND: SWISS IMAGE FOR ECOMMERCE

Base: users aged 16-65 Spain; %



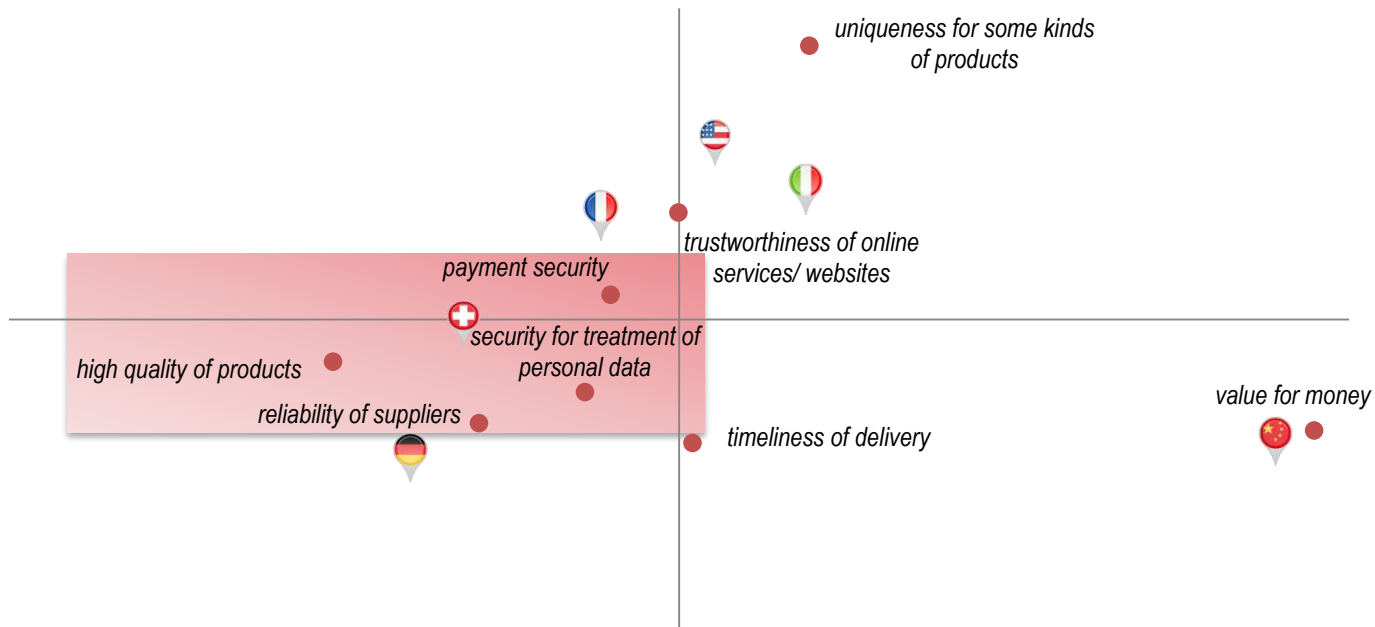
Benchmark values (excluded own country)	Country Image in Spain		International benchmarks			
	CH	Avg 6	Avg value	Top value	Top country	2nd
▪ high quality of products	59	44	43	65	DE	CH
▪ trustworthiness of online	42	44	47	58	DE	CH
▪ payment security	51	41	35	43	CH	DE
▪ timeliness of delivery	46	41	35	45	DE	CH
▪ reliability of suppliers	29	21	22	32	DE	CH
▪ security for treat. of personal data	33	25	23	30	CH	DE
▪ uniqueness .. of products	33	33	33	40	US	ITA
▪ value for money	19	33	36	56	CN	US

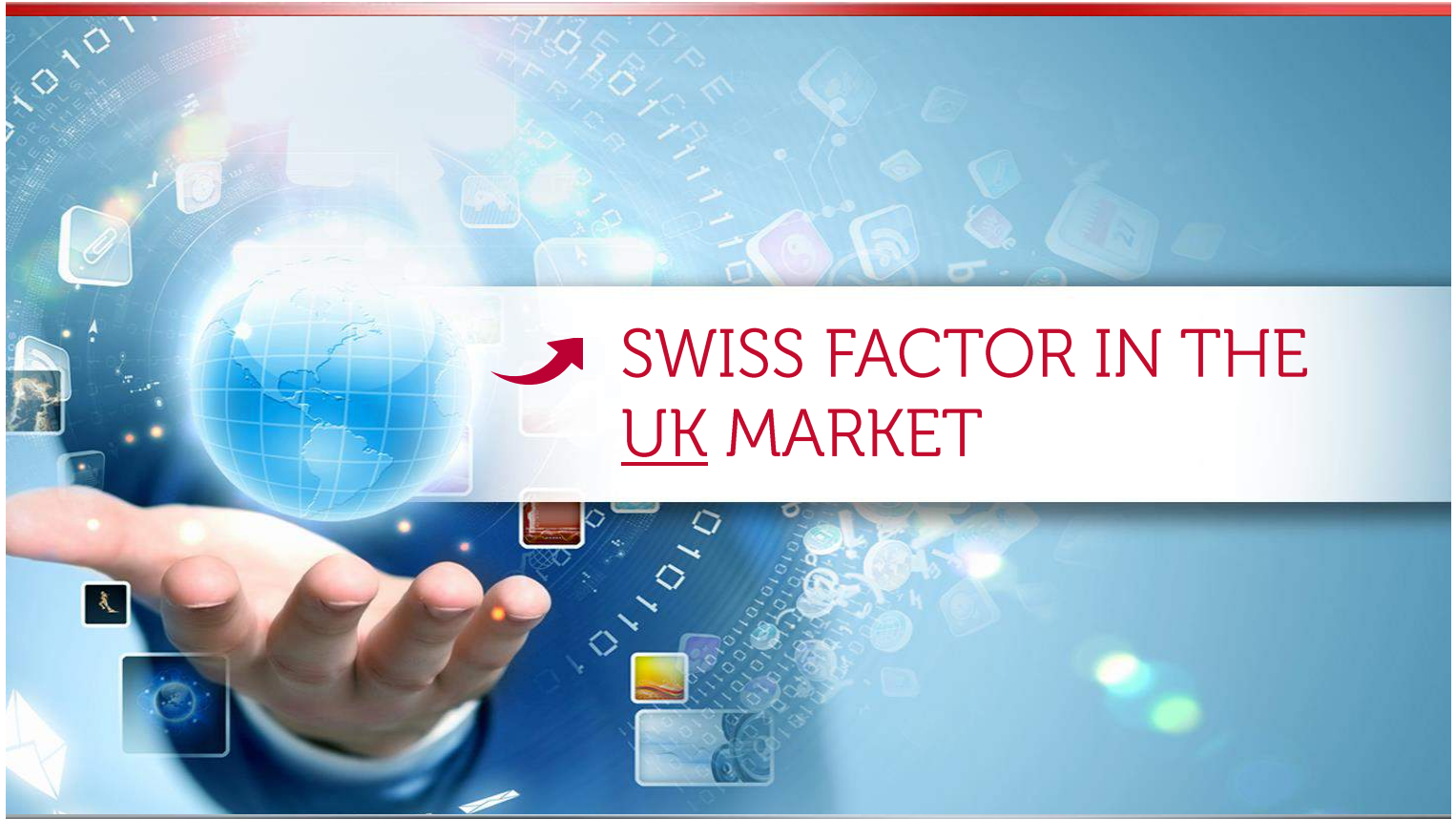
—■— online shoppers promoters of Switzerland n=130
 - - ■ - - crossborder online shoppers n=381



MAP OF ECOMMERCE COUNTRY IMAGE

Base: users aged 16-65 shopping online Spain promoters of online shopping in Switzerland, n=130; correspondence analysis





SWISS FACTOR IN THE UK MARKET




CROSSBORDER SHOPPERS FROM THE UK MARKET

Base: users aged 16-65 shopping online UK, n=952; %



United Kingdom
38.000.000 of online shoppers
\$ 82,9 bn spent online yearly

	Individuals 16- 65 y.o.	Estimated expenditure on foreign ecommerce
CROSSBORDER :	14.000.000 (37% of total online shoppers)	\$ 10,3 bn (24% of total expenditure)
	 280.000 buyers on Swiss sites (2% of total crossborders)	

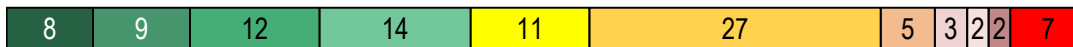


SWISS PROMOTERS IN UK

Base: users aged 16-65 shopping online UK, n=952; %

How strongly would you recommend buying a product online from a site based in Switzerland?

■ Absolutely = 10 ■ '9' ■ '8' ■ '7' ■ '6' ■ '5' ■ '4' ■ '3' ■ '2' ■ '1' ■ Not at all = 0



**PROMOTERS OF
SWITZERLAND 17%**

**REJECTORS OF
SWITZERLAND 57%**

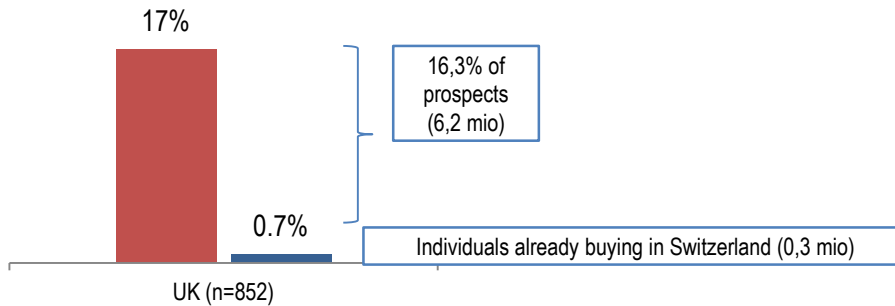


SWISS ECOMMERCE EXPORT POTENTIAL IN UK

Base: users aged 16-65 shopping online UK, n=952; %

Level of Swiss attractiveness

**6.500.000
PROMOTERS OF
SWITZERLAND**



PROMOTERS OF SWITZERLAND: PROFILE AND DIGITAL STRATEGY

Base: users aged 16-65 shopping online UK promoters of online shopping in Switzerland, n=161;%



United Kingdom:
38.000.000 of online shoppers.
\$ 82,9 bn spent online yearly

17% of total online shoppers

**6.500.000
PROMOTERS OF
SWITZERLAND**

SOCIODEMO/ PURCHASING RESP. %

Male 59/ Female 41; Avg age = 41

Decision makers:

TECH: 76 FOOD&BEV: 80 AUTOMOTIVE: 67

DIGITAL STRATEGY

Digital ACTIVITIES (weekly freq index)		Digital OWNED MEDIA	
▪ EMAIL reading/ sending	131	▪ NEWSLETTER subscribers	77%
▪ SOCIAL NETWORKING	108	▪ FANPAGE followers	46%
▪ MULTIMEDIA entertainment	98	▪ VIDEOS viewers (last 4 weeks)	65%
▪ ONLINE INFO-COMMERCE	91	▪ QR CODE users (last 4 weeks)	20%
▪ NEWS	109	MOBILE DEVICES	
▪ HOME BANKING	94	▪ TOTAL USERS (smart OR tablet)	75%
▪ ONLINE GAMES	68	• SMARTPHONE users	65%
▪ e-learning, hobby/ sports, place online ad ..., e-gouvernement, etc.	...	• SHOPPERS via smartphone	53%

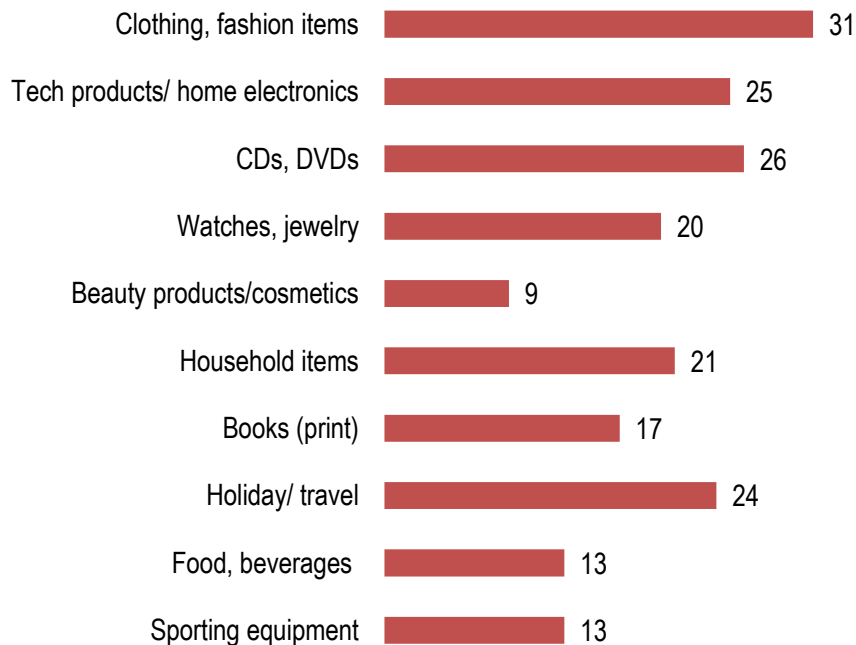
LEVEL OF INTERACTIVITY (0-100):

58



PROMOTERS OF SWITZERLAND: TOP 10 PRODUCT CATEGORIES PURCHASED ABROAD

Base: users aged 16-65 shopping crossborder UK promoters of online shopping in Switzerland, n=78;%



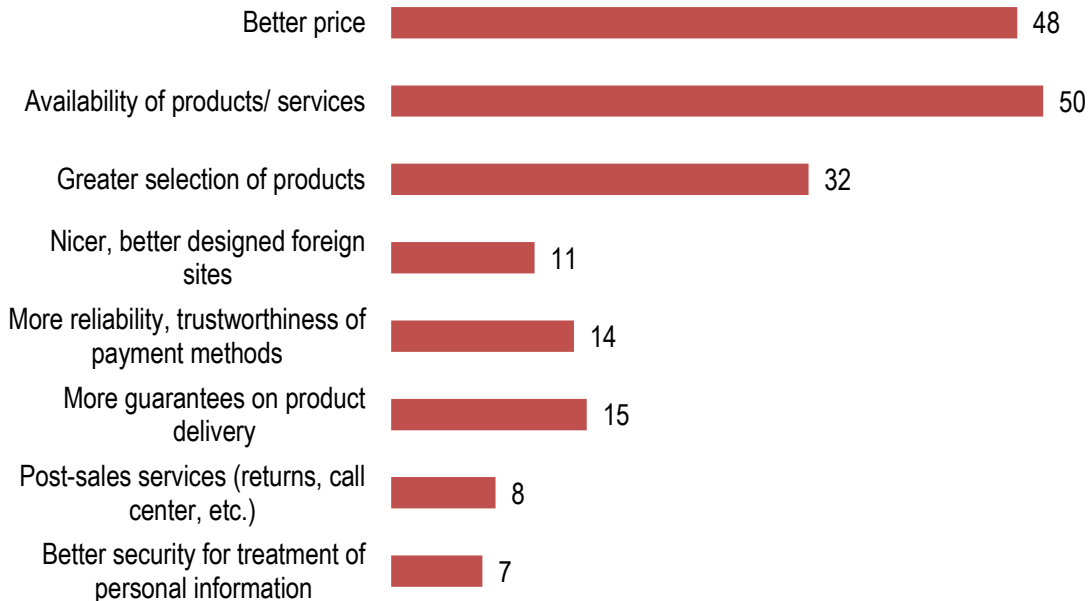
Total online category shopper (locally + abroad), % base: total Swiss prom. (n=161)	Weighted ratio abroad/ total
80	0,14
25	0,37
40	0,24
19	0,39
31	0,11
32	0,24
54	0,12
35	0,25
42	0,11
19	0,25



PROMOTERS OF SWITZERLAND: REASONS FOR BUYING CROSSBORDER

Base: users aged 16-65 shopping crossborder UK promoters of online shopping in Switzerland, n=78;%

Why did you choose to buy online through foreign e-commerce sites rather than on national ones?

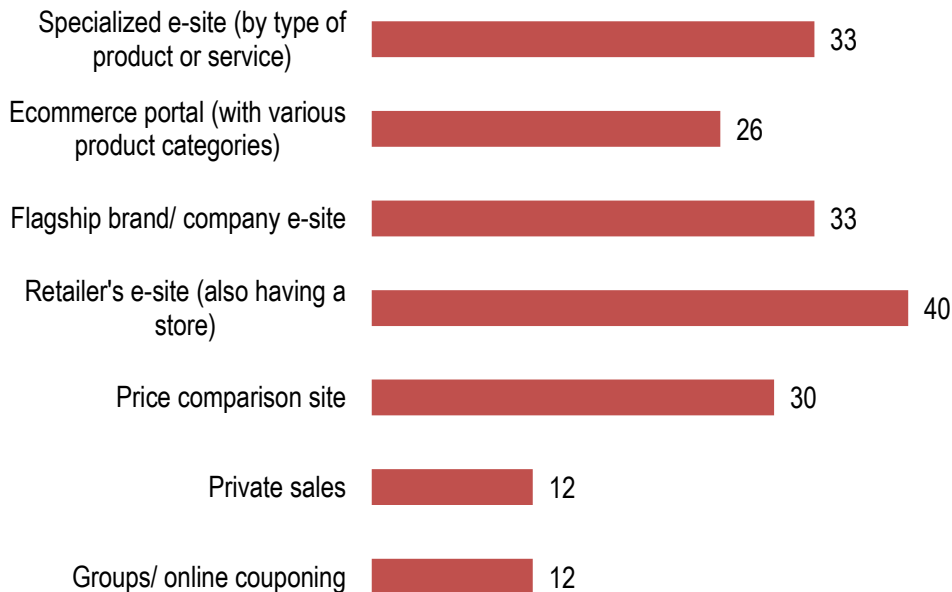




PROMOTERS OF SWITZERLAND: FAVOURITE ECOMMERCE CHANNELS

Base: users aged 16-65 shopping online UK promoters of online shopping in Switzerland, n=161; %

Generally speaking as regards online shopping, which are your favourite ecommerce channels?

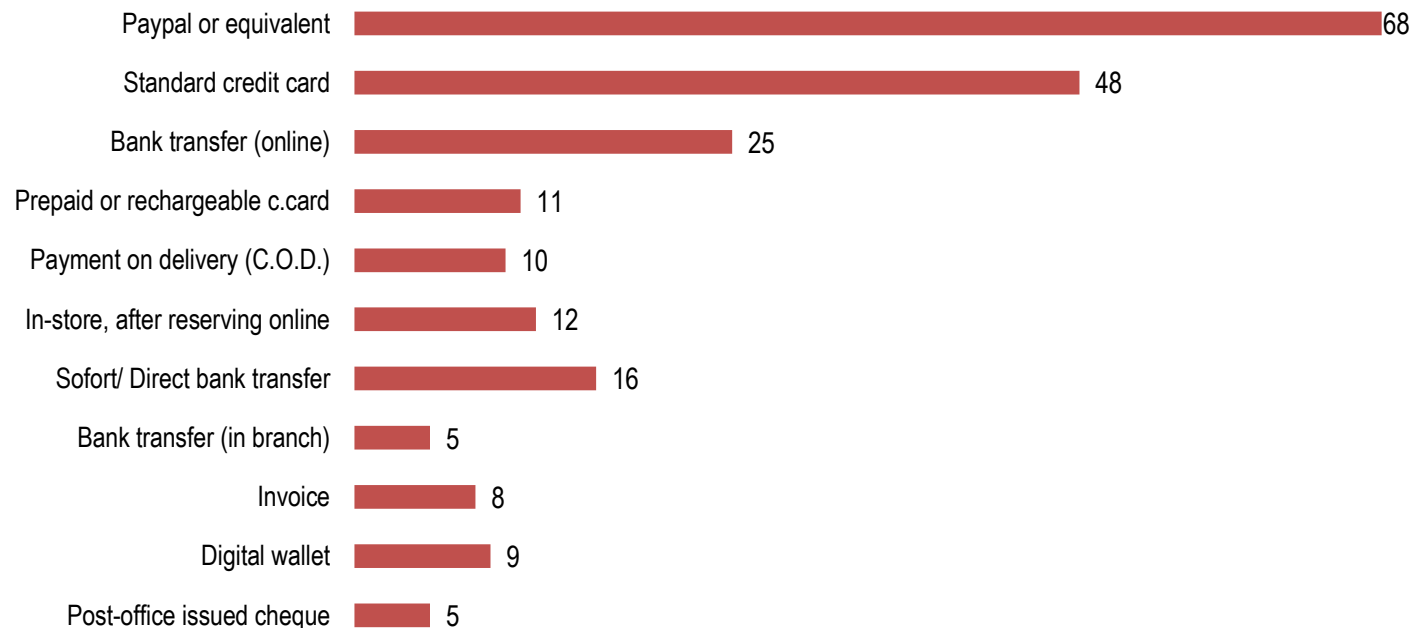




PROMOTERS OF SWITZERLAND: PREFERRED METHODS OF PAYMENT

Base: users aged 16-65 shopping online UK promoters of online shopping in Switzerland, n=161; %

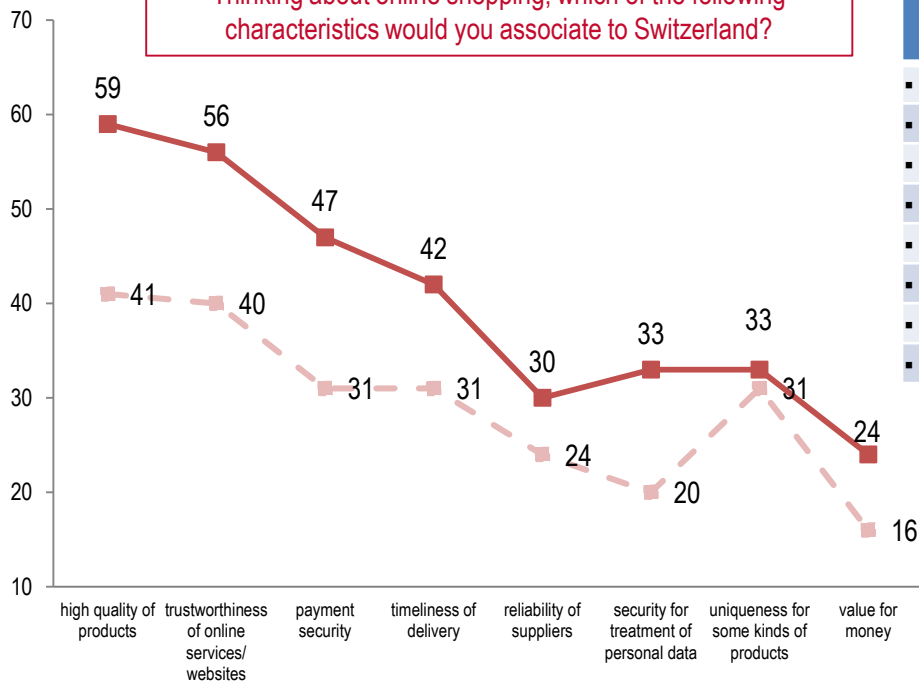
In the case of online purchases, what modes of payment do you prefer or would you prefer to use?



PROMOTERS OF SWITZERLAND: SWISS IMAGE FOR ECOMMERCE

Base: users aged 16-65 UK; %

Thinking about online shopping, which of the following characteristics would you associate to Switzerland?



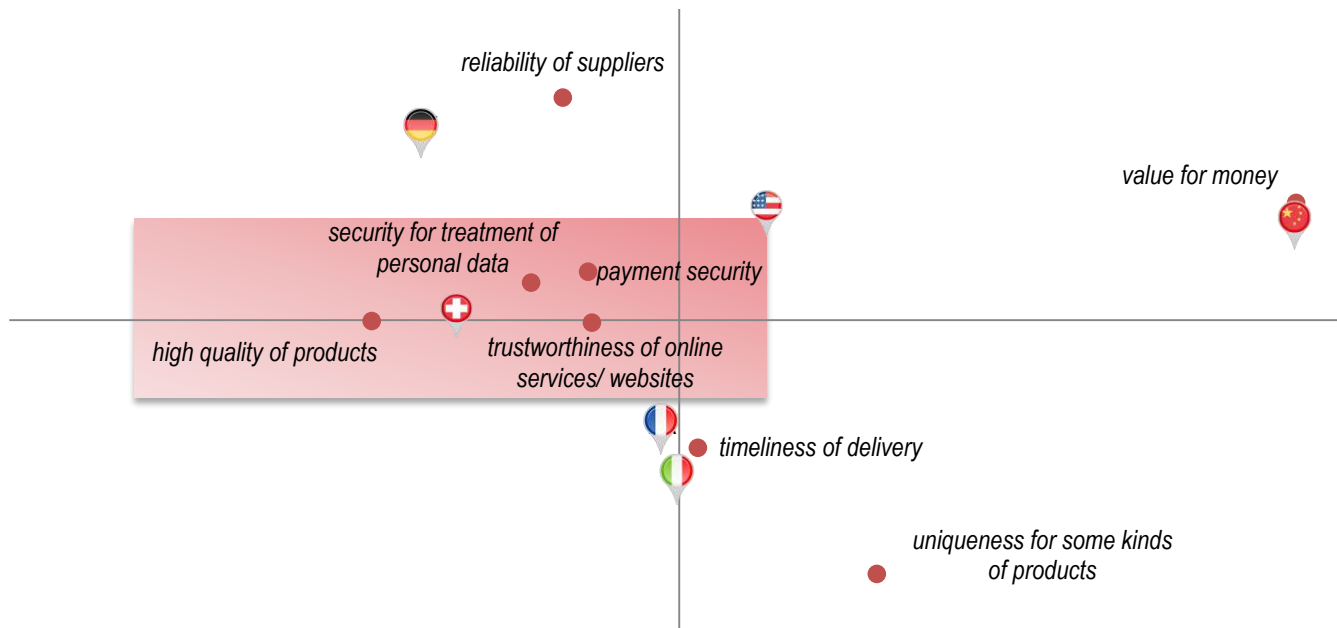
Benchmark values (excluded own country)	Country Image in UK		International benchmarks			
	CH	Avg 6	Avg value	Top value	Top country	2nd
high quality of products	59	47	43	65	DE	CH
trustworthiness of online	56	51	47	58	DE	CH
payment security	47	40	35	43	CH	DE
timeliness of delivery	42	39	35	45	DE	CH
reliability of suppliers	30	26	22	32	DE	CH
security for treat. of personal data	33	27	23	30	CH	DE
uniqueness .. of products	33	34	33	40	US	ITA
value for money	24	36	36	56	CN	US

—■— online shoppers promoters of Switzerland n=161
 - - ■ - - crossborder online shoppers n=303



MAP OF ECOMMERCE COUNTRY IMAGE

Base: users aged 16-65 shopping UK promoters of online shopping in Switzerland, n=161; correspondence analysis





SWISS FACTOR IN THE CHINESE MARKET

CROSSBORDER SHOPPERS FROM THE CHINESE MARKET

Base: users aged 16-65 shopping online Shanghai+Guangzhou, n=997, %




Shanghai:

11.300.000 of online shoppers
\$ 21,3 bn spent online yearly

Guangzhou:

6.400.000 mio. of online shoppers
\$ 11,7 bn spent online yearly

	Individuals 16- 65 y.o.	Estimated expenditure on foreign ecommerce
CROSSBORDER :	7.200.000 (41% of total online shoppers)	\$ 4,5 bn (23% of total expenditure)
	 530.000 buyers on Swiss sites (8% of total crossborders)	



SWISS PROMOTERS IN CHINA

Base: users aged 16-65 shopping online Shanghai+Guangzhou, n=997;%

How strongly would you recommend buying a product online from a site based in Switzerland?

■ Absolutely = 10 ■ '9' ■ '8' ■ '7' ■ '6' ■ '5' ■ '4' ■ '3' ■ '2' ■ '1' ■ Not at all = 0



**PROMOTERS OF
SWITZERLAND 34%**

(Shanghai 35%;
Guangzhou 33%)

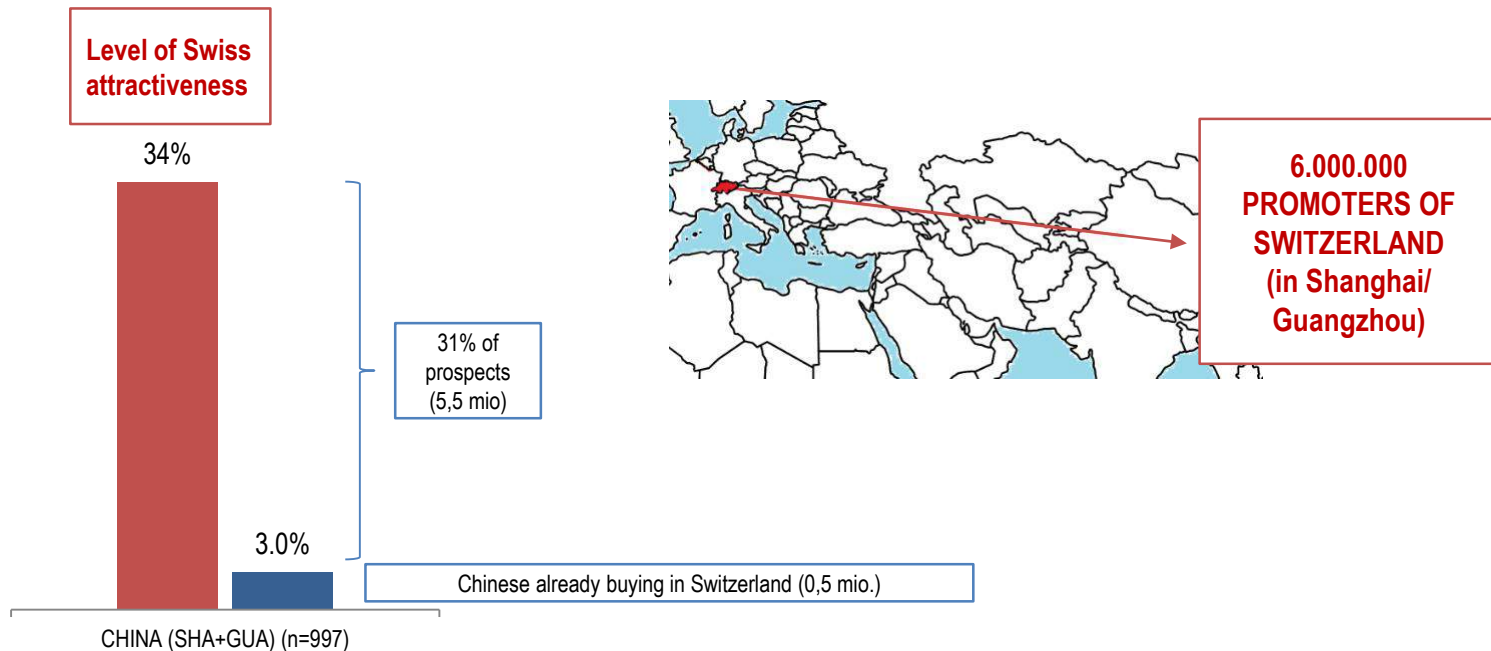
**REJECTORS OF
SWITZERLAND 29%**

(Shanghai 26%;
Guangzhou 31%)



SWISS ECOMMERCE EXPORT POTENTIAL IN CHINA

Base: users aged 16-65 shopping online Shanghai+Guangzhou, n=997; %



PROMOTERS OF SWITZERLAND: PROFILE AND DIGITAL STRATEGY

Base: users aged 16-65 shopping online Shanghai+Guangzhou promoters of online shopping in Switzerland, n=350;%



Shanghai:
11.300.000 of online shoppers.
\$ 21,3 bn spent online yearly
Guangzhou:
6.400.000 of online shoppers
\$ 11,7 bn spent online yearly

34% of total online shoppers

**6.000.000
PROMOTERS OF
SWITZERLAND**

SOCIODEMO/ PURCHASING RESP. %

Male 52/ Female 48; Avg age = 34

Decision makers:

TECH: 87 FOOD&BEV: 84 AUTOMOTIVE: 77

DIGITAL STRATEGY

Digital ACTIVITIES (weekly freq index)		Digital OWNED MEDIA	
▪ EMAIL reading/ sending	113	▪ NEWSLETTER subscribers	72%
▪ SOCIAL NETWORKING	112	▪ FANPAGE followers	39%
▪ MULTIMEDIA entertainment	104	▪ VIDEOS viewers (last 4 weeks)	80%
▪ ONLINE INFO-COMMERCE	97	▪ QR CODE users (last 4 weeks)	60%
▪ NEWS	111	MOBILE DEVICES	
▪ HOME BANKING	75	▪ TOTAL USERS (smart OR tablet)	79%
▪ ONLINE GAMES	88	• SMARTPHONE users	77%
▪ e-learning, hobby/ sports, place online ad ..., e-gouvernement, etc.	...	• SHOPPERS via smartphone	76%

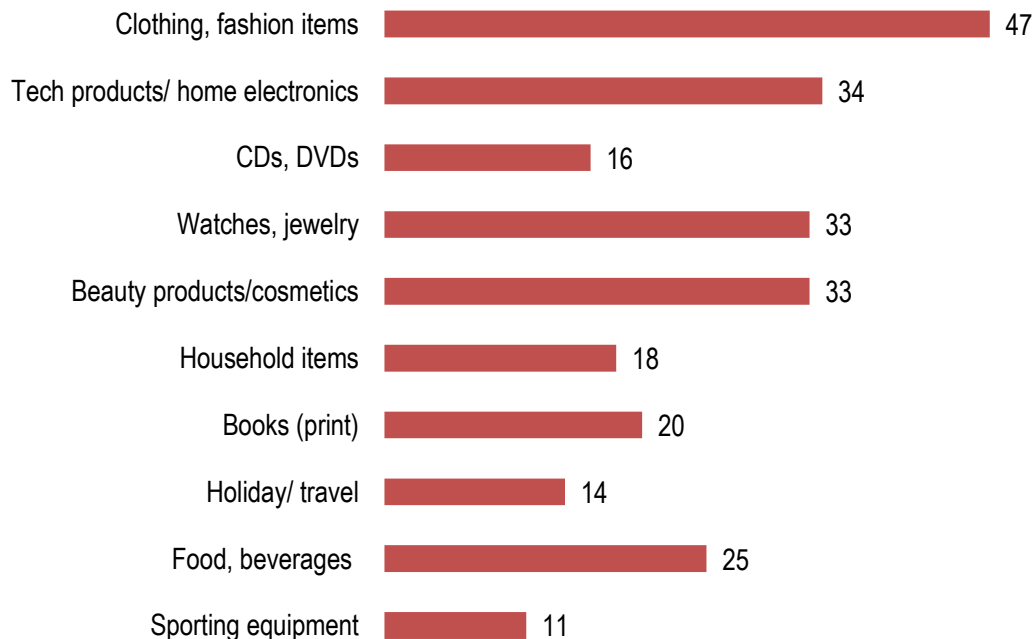
LEVEL OF INTERACTIVITY (0-100):

67



PROMOTERS OF SWITZERLAND: TOP 10 PRODUCT CATEGORIES PURCHASED ABROAD

Base: users aged 16-65 shopping crossborder Shanghai+Guangzhou promoters of online shopping in Switzerland, n=149; %

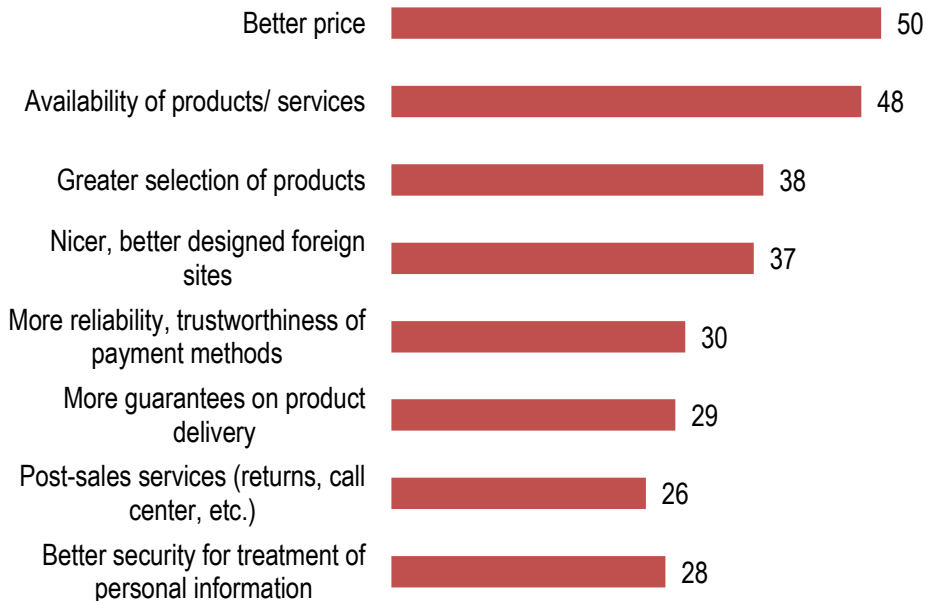


Total online category shopper (locally + abroad), % base: total Swiss prom. (n=350)	Weighted ratio abroad/ total
62	0,31
36	0,39
13	0,50
20	0,68
33	0,41
32	0,23
37	0,22
24	0,24
45	0,23
19	0,24

PROMOTERS OF SWITZERLAND: REASONS FOR BUYING ABROAD

Base: users aged 16-65 shopping crossborder Shanghai+Guangzhou promoters of online shopping in Switzerland, n=149; %

Why did you choose to buy online through foreign e-commerce sites rather than on national ones?

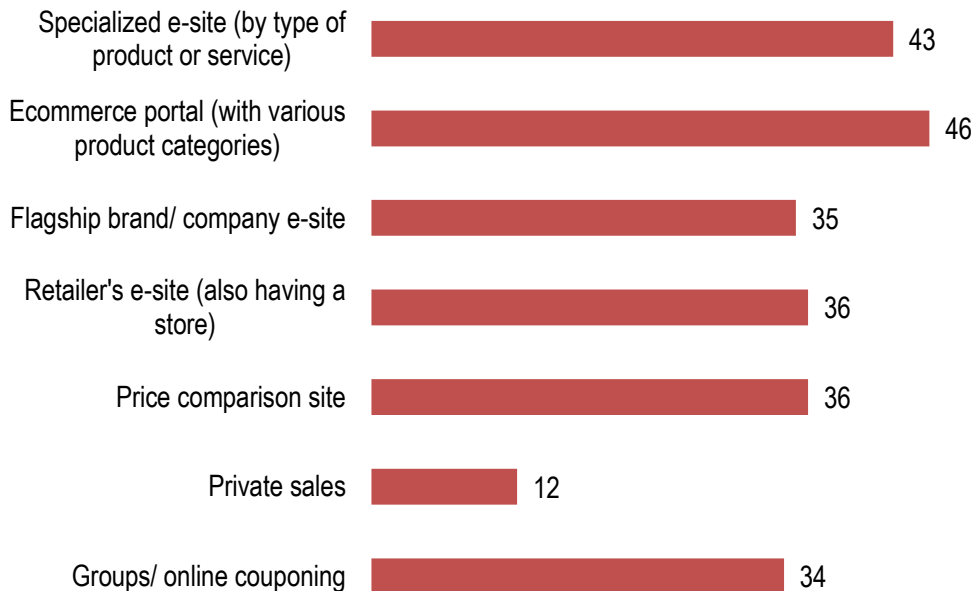




PROMOTERS OF SWITZERLAND: FAVOURITE ECOMMERCE CHANNELS

Base: users aged 16-65 shopping online Shanghai+Guangzhou promoters of online shopping in Switzerland, n=350; %

Generally speaking as regards online shopping, which are your favourite ecommerce channels?

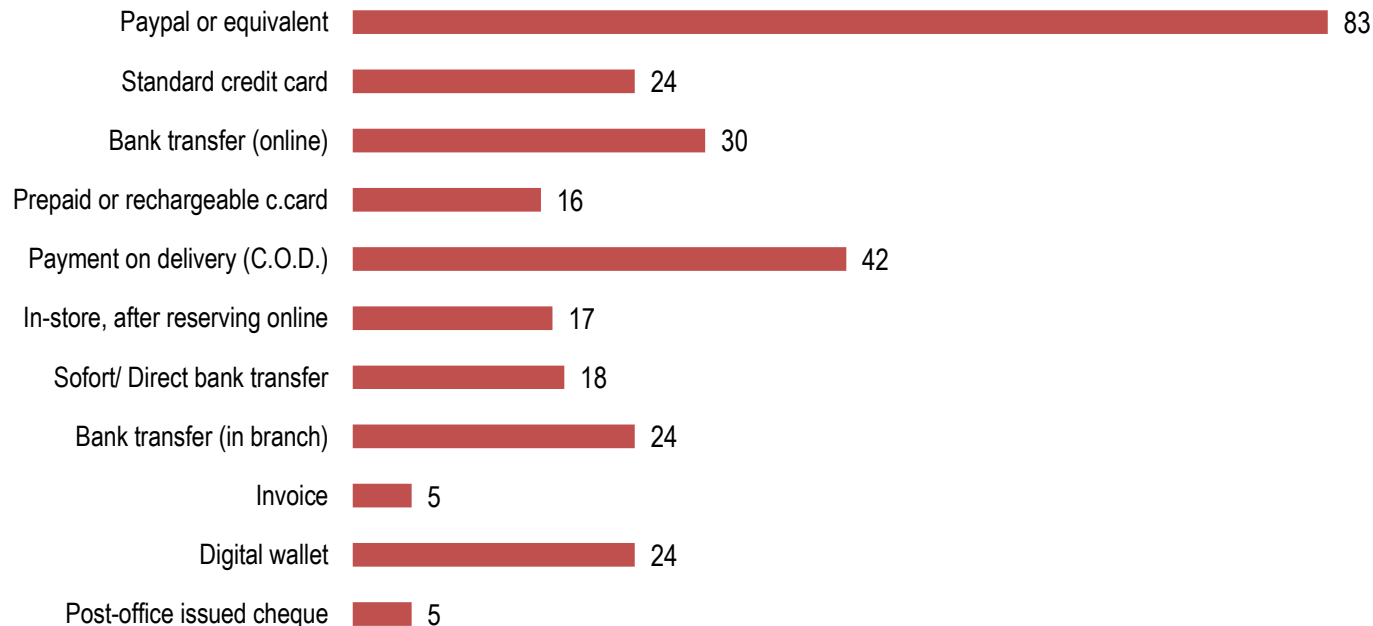




PROMOTERS OF SWITZERLAND: PREFERRED METHODS OF PAYMENT

Base: users aged 16-65 shopping online Shanghai+Guangzhou promoters of online shopping in Switzerland, n=350; %

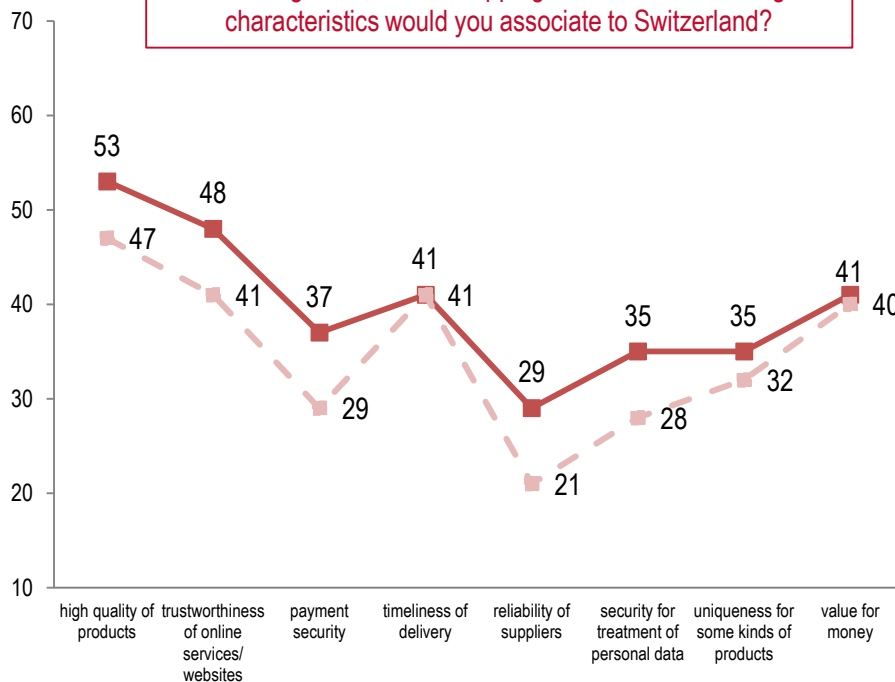
In the case of online purchases, what modes of payment do you prefer or would you prefer to use?



PROMOTERS OF SWITZERLAND: SWISS IMAGE FOR ECOMMERCE

Base: users aged 16-65 shopping online Shanghai+Guangzhou; %

Thinking about online shopping, which of the following characteristics would you associate to Switzerland?



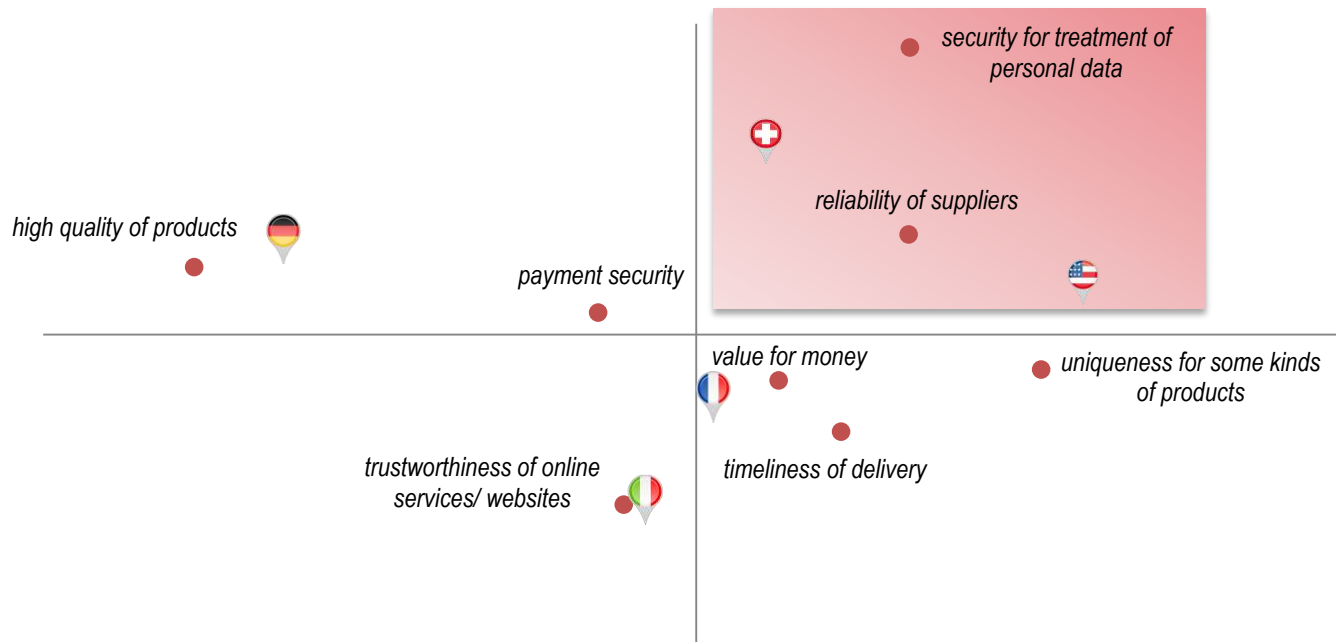
Benchmark values (excluded own country)	Country Image in Sha+Gua		International benchmarks			
	CH	Avg 5	Avg value	Top value	Top country	2nd
high quality of products	53	52	43	65	DE	CH
trustworthiness of online	48	49	47	58	DE	CH
payment security	37	39	35	43	CH	DE
timeliness of delivery	41	41	35	45	DE	CH
reliability of suppliers	29	28	22	32	DE	CH
security for treat. of personal data	35	29	23	30	CH	DE
uniqueness .. of products	35	34	33	40	US	ITA
value for money	41	42	36	56	CN	US

—■— online shoppers promoters of Switzerland n=350
 - - - ■ - - - crossborder online shoppers n=386



MAP OF ECOMMERCE COUNTRY IMAGE

Base: users aged 16-65 shopping online Shanghai + Guangzhou promoters of online shopping in Switzerland, n=350; correspondence analysis



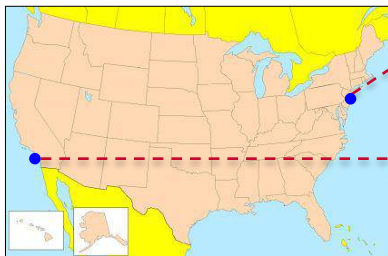


SWISS FACTOR IN THE US MARKET



CROSSBORDER SHOPPERS FROM THE US MARKET

Base: users aged 16-65 shopping online New York+ Los Angeles, n=995; %



New York:

6.600.000 of online shoppers

\$ 15,0 bn spent online yearly

Los Angeles:

3.100.000 mio. of online shoppers

\$ 5,8 bn spent online yearly

Individuals 16- 65 y.o.

Estimated expenditure
on foreign ecommerce

CROSSBORDER :

4.100.000

(42% of total online shoppers)

\$ 4,2 bn

(36% of total expenditure)



150.000 buyers on Swiss sites

(4% of total crossborders)

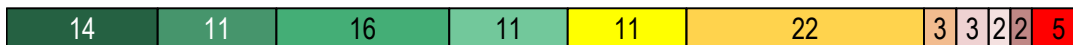


SWISS PROMOTERS IN US

Base: users aged 16-65 shopping online New York+ Los Angeles, n=995; %

How strongly would you recommend buying a product online from a site based in Switzerland?

■ Absolutely = 10 ■ '9' ■ '8' ■ '7' ■ '6' ■ '5' ■ '4' ■ '3' ■ '2' ■ '1' ■ Not at all = 0



**PROMOTERS OF
SWITZERLAND 25%**

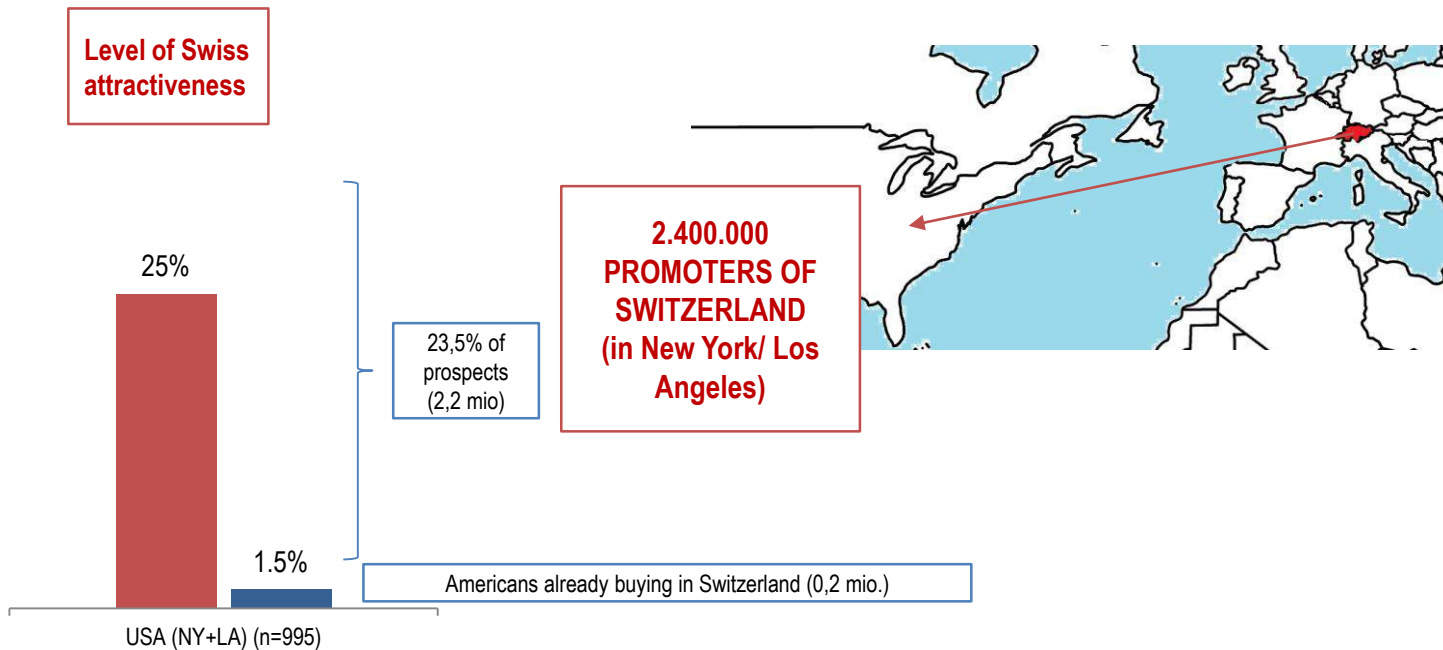
**REJECTORS OF
SWITZERLAND 48%**



SWISS ECOMMERCE EXPORT POTENTIAL IN US

Base: users aged 16-65 shopping online New York + Los Angeles, n=995; %

Level of Swiss attractiveness



PROMOTERS OF SWITZERLAND: PROFILE AND DIGITAL STRATEGY

Base: users aged 16-65 shopping online New York + Los Angeles promoters of online shopping in Switzerland, n=254; %



New York:
6.600.000 of online shoppers
\$ 15,0 bn spent online yearly

Los Angeles:
3.100.000 mio. of online shoppers
\$ 5,8 bn spent online yearly

25% of total online shoppers

**2.400.000
PROMOTERS OF
SWITZERLAND**

SOCIODEMO/ PURCHASING RESP. %

Male 57/ Female 43; Avg age = 38

Decision makers:

TECH: 82

FOOD&BEV: 85

AUTOMOTIVE: 76

DIGITAL STRATEGY

Digital ACTIVITIES (weekly freq index)		Digital OWNED MEDIA	
▪ EMAIL reading/ sending	124	▪ NEWSLETTER subscribers	76%
▪ SOCIAL NETWORKING	108	▪ FANPAGE followers	60%
▪ MULTIMEDIA entertainment	94	▪ VIDEOS viewers (last 4 weeks)	65%
▪ ONLINE INFO-COMMERCE	92	▪ QR CODE users (last 4 weeks)	38%
▪ NEWS	107	MOBILE DEVICES	
▪ HOME BANKING	90	▪ TOTAL USERS (smart OR tablet)	81%
▪ ONLINE GAMES	85	• SMARTPHONE users	73%
▪ e-learning, hobby/ sports, place online ad ..., e-gouvernement, etc.	...	• SHOPPERS via smartphone	66%

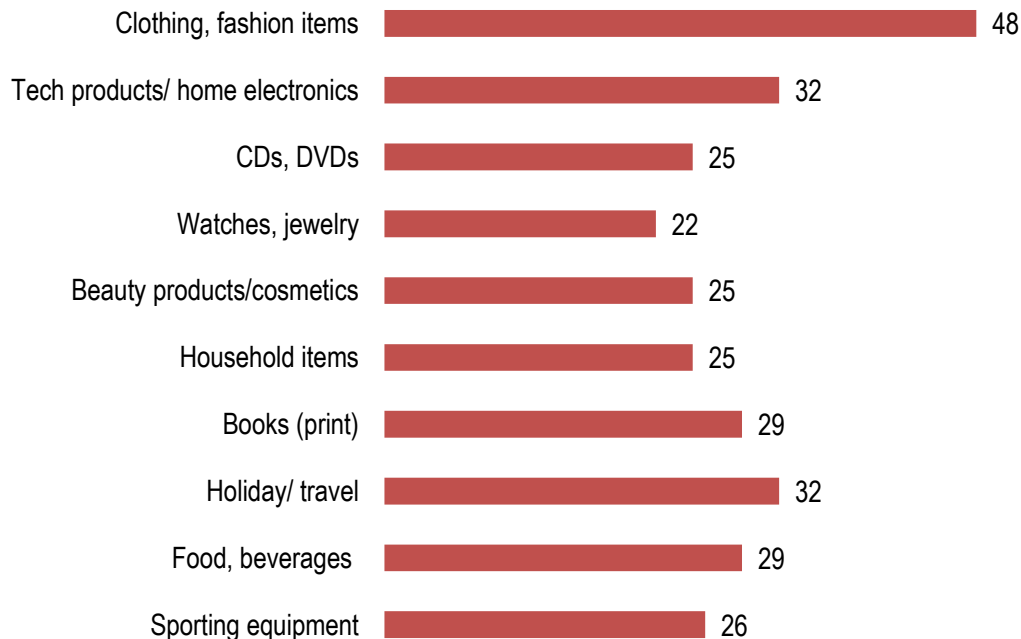
LEVEL OF INTERACTIVITY (0-100):

64



PROMOTERS OF SWITZERLAND: TOP 10 PRODUCT CATEGORIES PURCHASED ABROAD

Base: users aged 16-65 shopping crossborder NY+LA promoters of online shopping in Switzerland, n=136; %

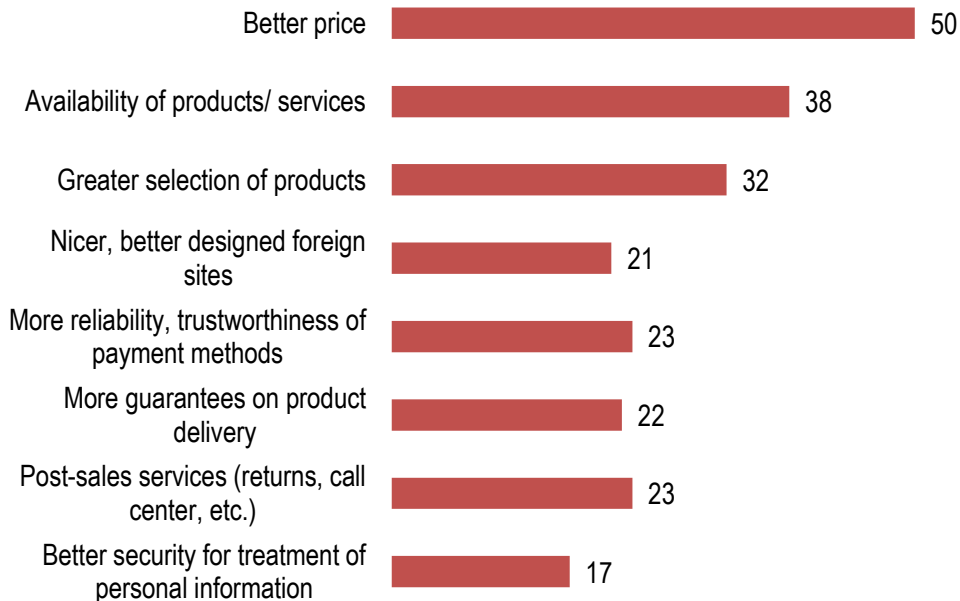


Total online category shopper (locally + abroad), % base: total Swiss prom. (n=254)	Weighted ratio abroad/ total
58	0,35
28	0,48
30	0,35
25	0,37
34	0,31
31	0,34
33	0,37
25	0,54
33	0,37
22	0,50

PROMOTERS OF SWITZERLAND: REASONS FOR BUYING ABROAD

Base: users aged 16-65 shopping crossborder New York + Los Angeles promoters of online shopping in Switzerland, n=136; %

Why did you choose to buy online through foreign e-commerce sites rather than on national ones?

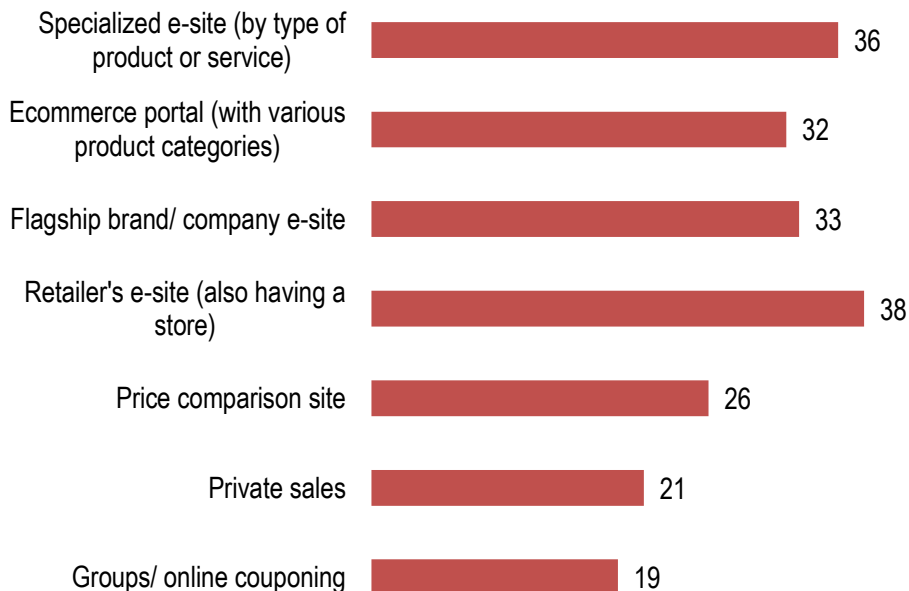




PROMOTERS OF SWITZERLAND: FAVOURITE ECOMMERCE CHANNELS

Base: users aged 16-65 shopping online New York + Los Angeles promoters of online shopping in Switzerland, n=254; %

Generally speaking as regards online shopping, which are your favourite ecommerce channels?

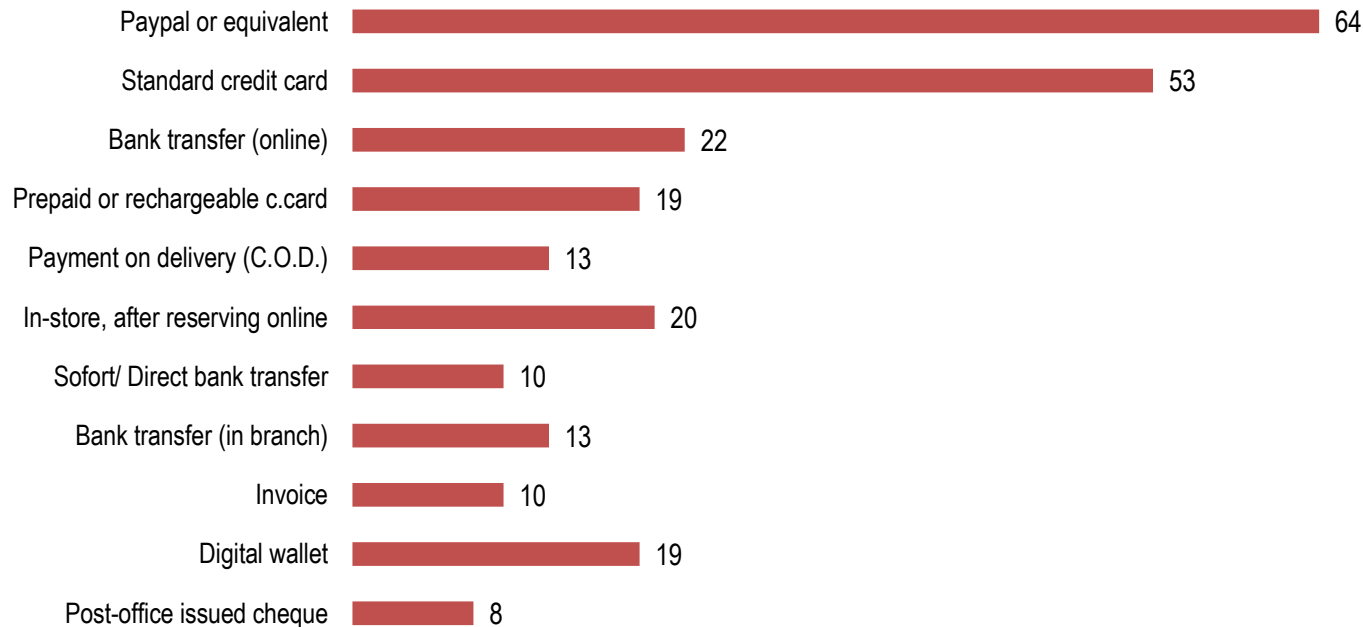




PROMOTERS OF SWITZERLAND: PREFERRED METHODS OF PAYMENT

Base: users aged 16-65 shopping online New York + Los Angeles promoters of online shopping in Switzerland, n=254; %

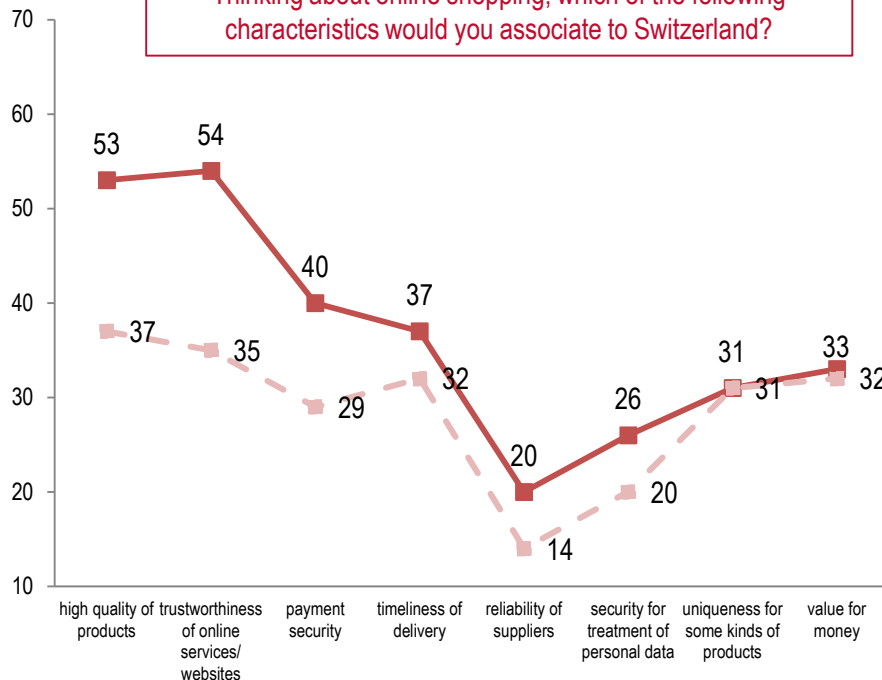
In the case of online purchases, what modes of payment do you prefer or would you prefer to use?



PROMOTERS OF SWITZERLAND: SWISS IMAGE FOR ECOMMERCE

Base: users aged 16-65 online shoppers New York + Los Angeles; %

Thinking about online shopping, which of the following characteristics would you associate to Switzerland?



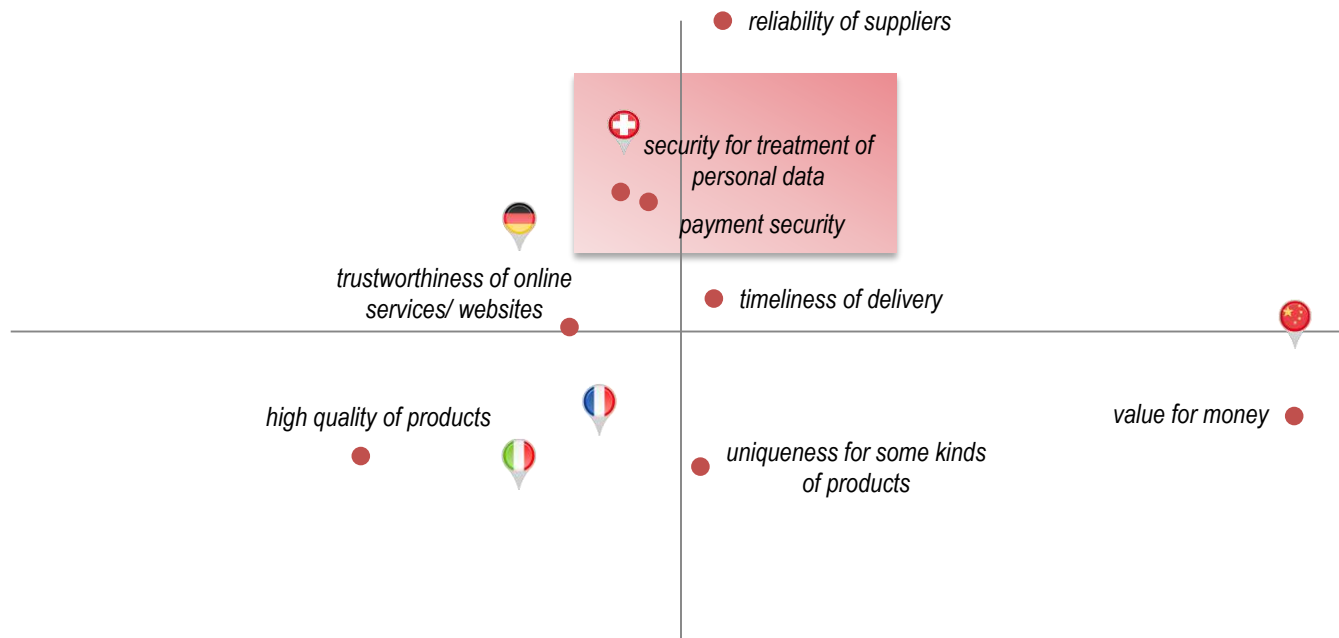
Benchmark values (excluded own country)	Country Image in NY+LA		International benchmarks			
	CH	Avg 5	Avg value	Top value	Top country	2nd
high quality of products	53	50	43	65	DE	CH
trustworthiness of online	54	50	47	58	DE	CH
payment security	40	30	35	43	CH	DE
timeliness of delivery	37	33	35	45	DE	CH
reliability of suppliers	20	16	22	32	DE	CH
security for treat. of personal data	26	22	23	30	CH	DE
uniqueness .. of products	31	31	33	40	US	ITA
value for money	33	35	36	56	CN	US

—■— online shoppers promoters of Switzerland n=254
 - - - ■ - - - crossborder online shoppers n=378



MAP OF ECOMMERCE COUNTRY IMAGE

Base: users aged 16-65 shopping online New York + Los Angeles, promoters of online shopping in Switzerland, n=254; correspondence analysis



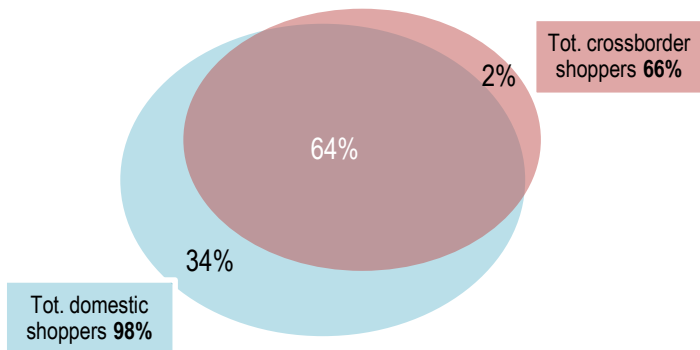


CROSS-BORDER SHOPPERS FROM SWITZERLAND



CROSS BORDER ONLINE SHOPPING: FOCUS ON SWITZERLAND

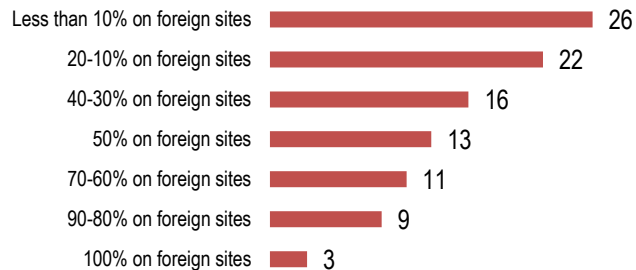
Base: users aged 16-65 online shopping in the last 12 months net «not indicated», n=850; %



	2015	2014
Online shoppers,	90%	90%
Tot. cross border online shoppers	66%	62%
Only cross border shoppers	2%	4%

...approximately how much do you spend on foreign sites?

Base: crossborder online shoppers 16-65 y.o., CH, n=558; %











Crossborder share of total online expenditure: 35%

CROSS BORDER ONLINE SHOPPING: INTERNATIONAL VIEW

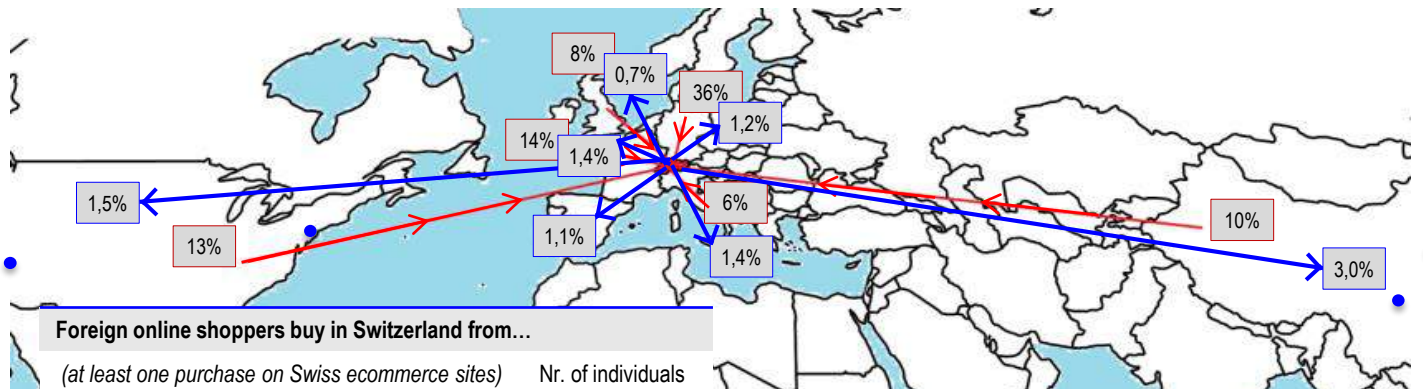
Base: users aged 16-65, %

(...) over the last 12 months, have you ever completed an online purchase through a foreign e-commerce site (...)?

								
ONLINE SHOPPERS LAST 12 MONTHS (.000)	CH	IT	UK	DE	FR	ES	SHA+GU A	NY+LA
	4.700	12.400	38.000	46.200	31.200	15.500	17.700	9.700
	n= 911	n=7.042	n=952	n=964	n=877	n=623	n=997	n=995
CROSBORDER SHOPPERS (penetration)	66%	58%	37%	32%	49%	66%	41%	42%
ESTIMATED UNIVERSE OF IND. (.000)	3.000	7.200	14.000	14.800	15.300	10.300	7.200	4.100
EXPENDITURE ON FOREIGN E-SITES (% on total ecommerce expenditure)	35%	25%	24%	16%	21%	34%	23%	36%
ESTIMATED EXPENDITURE ON FOREIGN E-SITES	\$ 2,7 bn	\$ 3,1 bn	\$ 10,3bn	\$ 4,8bn	\$ 4,3bn	\$ 4,8bn	\$ 4,5bn	\$ 4,2bn

CROSS BORDER ECOMMERCE: EXPORT/ IMPORT ANALYSIS

Base: online shoppers 16-65 y.o.,



Foreign online shoppers buy in Switzerland from...

(at least one purchase on Swiss ecommerce sites)

Nr. of individuals

GERMANY	1,20%	580.000
SHA+GUA	3,00%	530.000
FRANCE	1,40%	430.000
UK	0,70%	280.000
ITALY	1,40%	180.000
SPAIN	1,10%	170.000
NY + LA	1,50%	150.000
TOT (7 market/ areas)		2.320.000

Swiss online shoppers purchase from...

Nr. of individuals

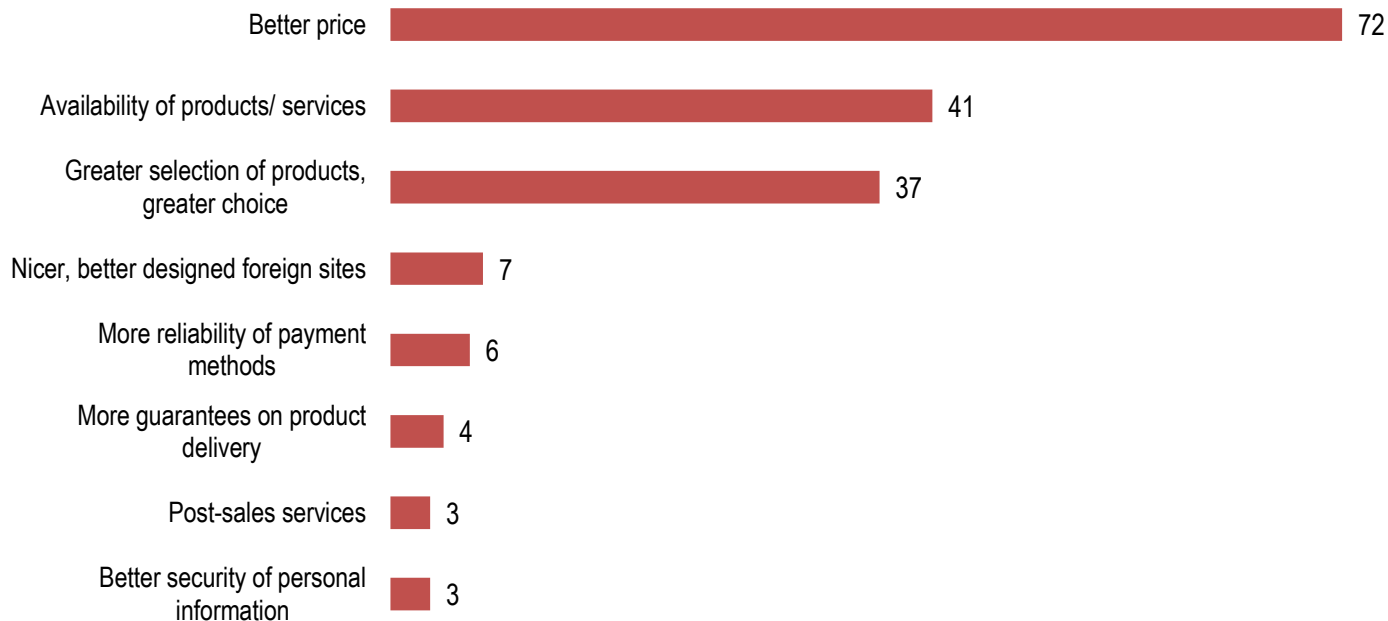
GERMANY	36%	1.672.000
FRANCE	14%	655.000
USA	13%	619.000
CHINA	10%	454.000
UK	8%	356.000
ITALY	6%	263.000

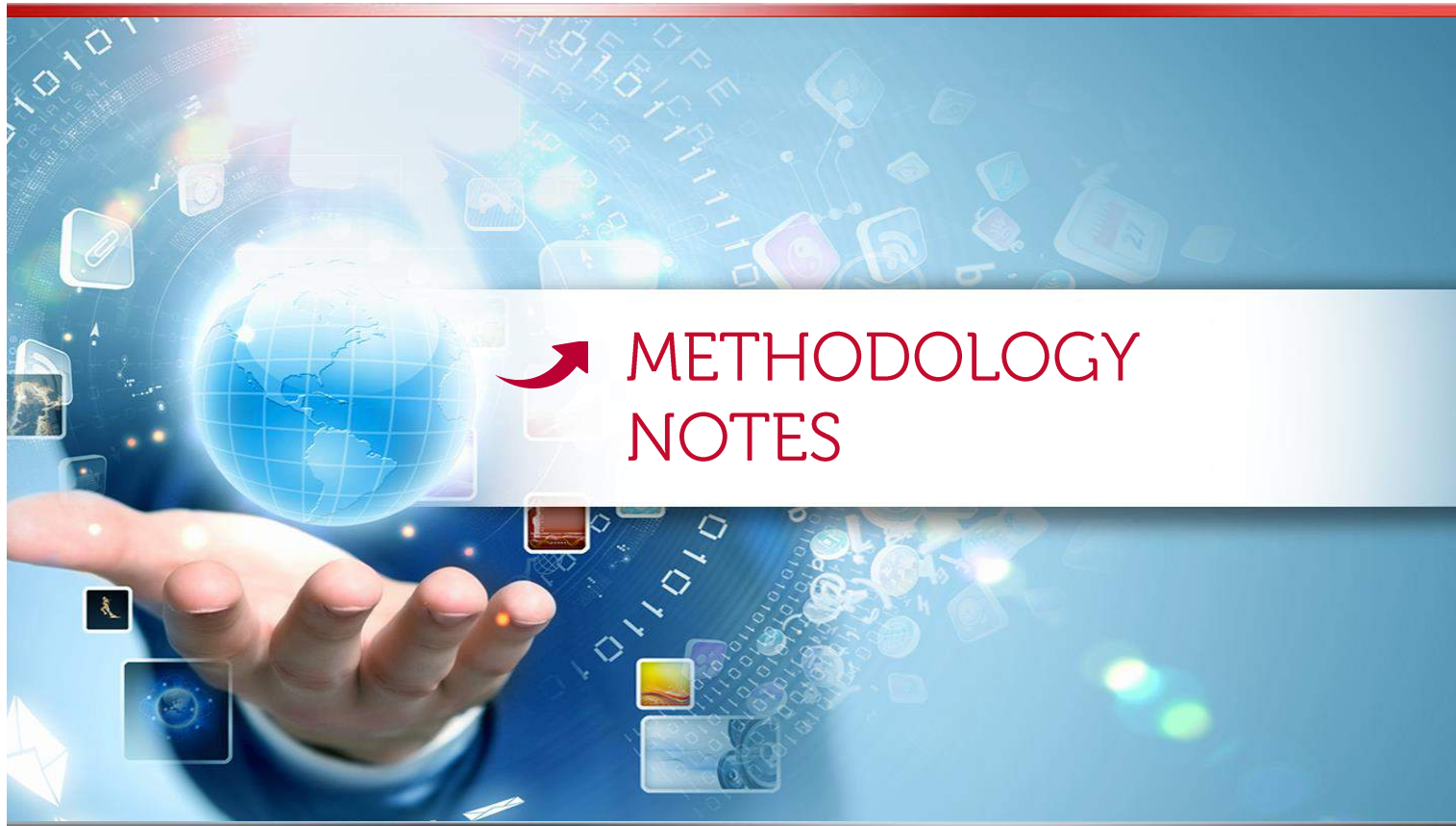


CROSS BORDER ECOMMERCE: GENERAL REASONS FOR BUYING ON FOREIGN SITES

Base: Swiss online shoppers 16-65 y.o. on foreign sites, %

Why did you choose to buy online through foreign e-commerce sites rather than on national ones?





METHODOLOGY NOTES

Interview method (by EDBS ContactLab model)

European countries: CAWI survey on 'regular' internet users aged 16 – 65, or individuals who connect at least on a weekly basis, regardless of the device and reason.







New York/ Los Angeles and Shanghai/ Guangzhou: CAWI survey on 'online shoppers' 16 -65, or individuals who purchased/ordered online goods/services in the last year.

Sample design

In the European countries, a representative sample has been carried out based on the latest data provided by the Eurostat – Information Society and by national bureaus of statistics. As regard New York/ Los Angeles and Shanghai/ Guangzhou, the US Census and CNNIC (China Internet Network Information Center) data have been respectively used.

Interviewed between 7 – 30 of April 2015

REPRESENTED UNIVERSE AND SOCIO-DEMOGRAPHIC PROFILE (1/3)

						
REGULAR INTERNET USERS 16-65 Y.O.	n=1.012	n=1.020	n=1.022	n=1.045	n=1.029	n=1.046
MERCHANT OVERSAMPLING		n=15.324				
ESTIMATED UNIVERSES (.000)	5.200	28.700	40.800	50.300	36.600	26.000

	CH	IT	UK	DE	FR	ES
Gender:						
Male	52	52	51	53	51	51
Female	48	48	49	47	49	49
Age groups:						
16-24	17	18	19	16	19	19
25-34	22	20	22	21	21	21
35-44	22	27	21	20	22	22
45-54	23	21	22	25	20	20
55-65	16	14	17	18	18	18
Average age	40	39	40	41	40	40

REPRESENTED UNIVERSE AND SOCIO-DEMOGRAPHIC PROFILE (2/3)

	 SHANGHAI	 GUANGZHOU	 NEW YORK	 LOS ANGELES
ONLINE SHOPPERS 16-65 Y.O.	n=561	n=436	n=506	n=489
ESTIMATED UNIVERSES (.000)	11.300	6.400	6.608	3.109

	SHANGHAI	GUANGZHOU	NEW YORK	LOS ANGELES
Gender:				
Male	56	56	48	51
Female	44	44	52	49
Age groups:				
16-24	30	30	19	20
25-34	33	33	24	24
35-44	21	21	21	22
45-54	10	10	19	19
55-65	6	6	17	15
Average age	33	33	39	39

SOCIO-DEMOGRAPHIC PROFILE (3/3)

Base: total users 16 -65 y.o.

Profile by geographical areas

CH (n=1.012; %)		IT (n=16.344; %)		UK (n=1.022; %)		DE (n=1.045; %)		FR (n=1.029; %)		ES (n=1.046; %)	
Région lémanique	19	Nord Ovest	29	North East	4	Nielsen I	17	Paris	19	Región I + Amb	24
Espace Mittelland	21	Nord Est	20	North West	11	Nielsen II	22	Nord	8	Región II	14
Nordwestschweiz	14	Centro	21	Yorkshire & the H.	8	Nielsen III	27	Est	9	Región III	18
Zürich	18	Sud e Isole	30	East Midlands	7	Nielsen IV	15	Bassin Par. Est	6	Región IV + Amm	23
Ostschweiz	14			West Midlands	9	Nielsen V+VI	12	Bassin Par. Ouest	8	Región V	9
Zentralschweiz	10			East of England	9	Nielsen VII	7	Ouest	14	Región VI	8
Ticino	4			London	13			Sud-Ouest	11	Canarias	4
				South East	14			Sud-Est	12		
				South West	9			Mediterranée	13		
				Wales	5						
				Scotland	8						
				Northern Ireland	3						

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Application demand

Application demand / Registration form

A - member ☐ B - member ☐ C - member ☐

Note: Please check below for the summarizing table about fees

Having read and accepted the Statute, the directives and the by-laws of the Association in all their parts, the Company:

requires to be admitted as a member of NetComm Suisse, the Swiss association of electronic commerce and digital communication.

As stated in the Statute, this application demand will be examined by the Association Managing Board and the applicant will receive an acceptance confirmation within 15 days from the date of this document.

Please fill in the following form with the applicant company's data in all its parts, since it is an integral part of your application for membership.

Applicant data

Company / Institution: _____

Activity / Industry: _____

Address: _____

Telephone number: _____ Fax: _____

E-Mail: _____

Website: _____



Online shop website: _____

Company foundation year: _____

Registered in the Retail trade and commercial register on (date): _____ (Please enclose certificate)

Name of the contact person within the Company: _____

Role: _____

Telephone number: _____ Mobile: _____

Fax: _____ E-Mail: _____

Name of the owner / managing director: _____

Please note that, in order to confirm your membership in the Association, we need to receive your certificate of registration in the Retail trade and commercial register and to acknowledge receipt of the association fee within 30 days from the signature of the contract.

Place and date _____

Applicant Company
Stamp and signature of the legal representative

Summarizing table about Association Fees (VAT not included)

Category	Turnover	Association Fee
A	Annual turnover below 5 Mio	CHF. 1'500.- year
B	Annual turnover from 5 Mio to 10 Mio	CHF. 2'500.- year
C	Annual turnover over 10 Mio	CHF. 3'500.- year

Fill in and send to NetComm Suisse – Via Cantonale 18 – 6928 Manno (CH) or by email to info@netcommsuisse.ch





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tel. (+49) 89 41 11 23 444

Association main supporters



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