

e-Commerce Data

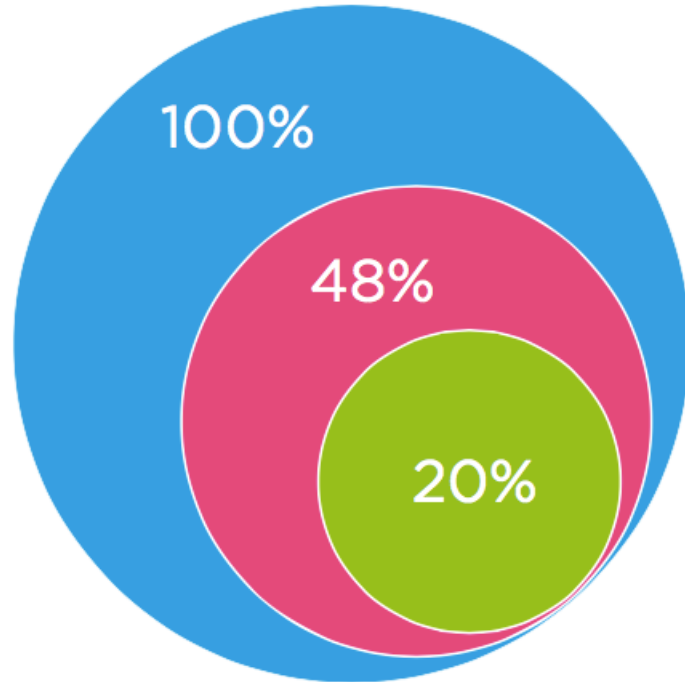
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1. The Global e-Commerce Opportunity

An Incredible potential outside Switzerland



7,223 million

people live in the world

2,737 million*

people use the Internet

1,139 million*

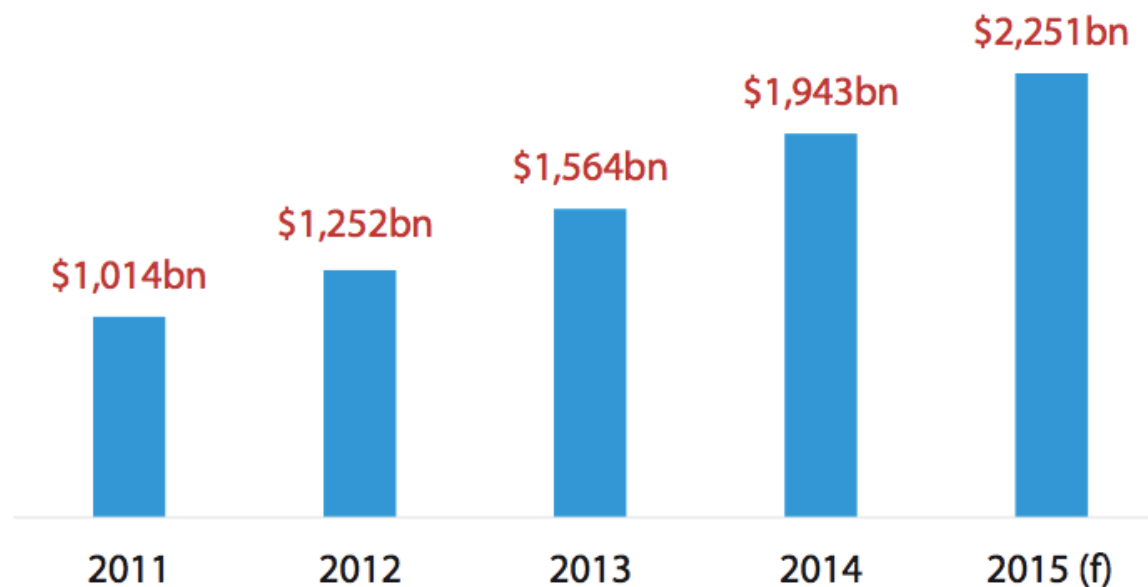
people are e-shoppers

*excluding people aged 0-14

Source Emarketer, Ecommerce Foundation, 2015

Global B2C e-Commerce Sales

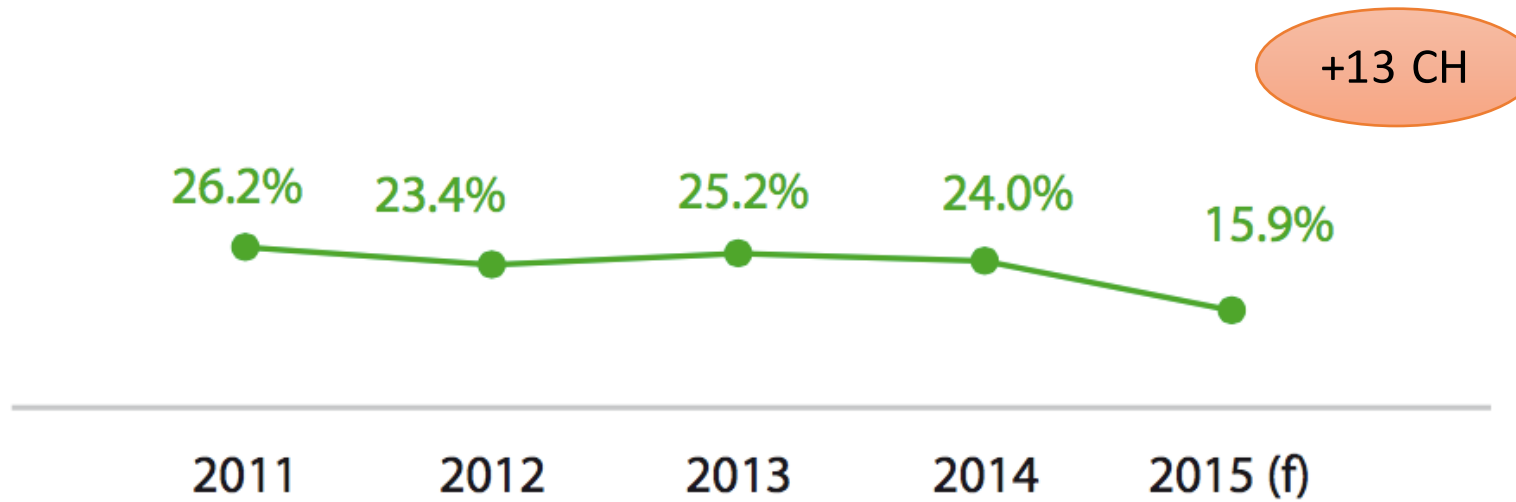
Total online sales of goods and services*
2011 - 2015



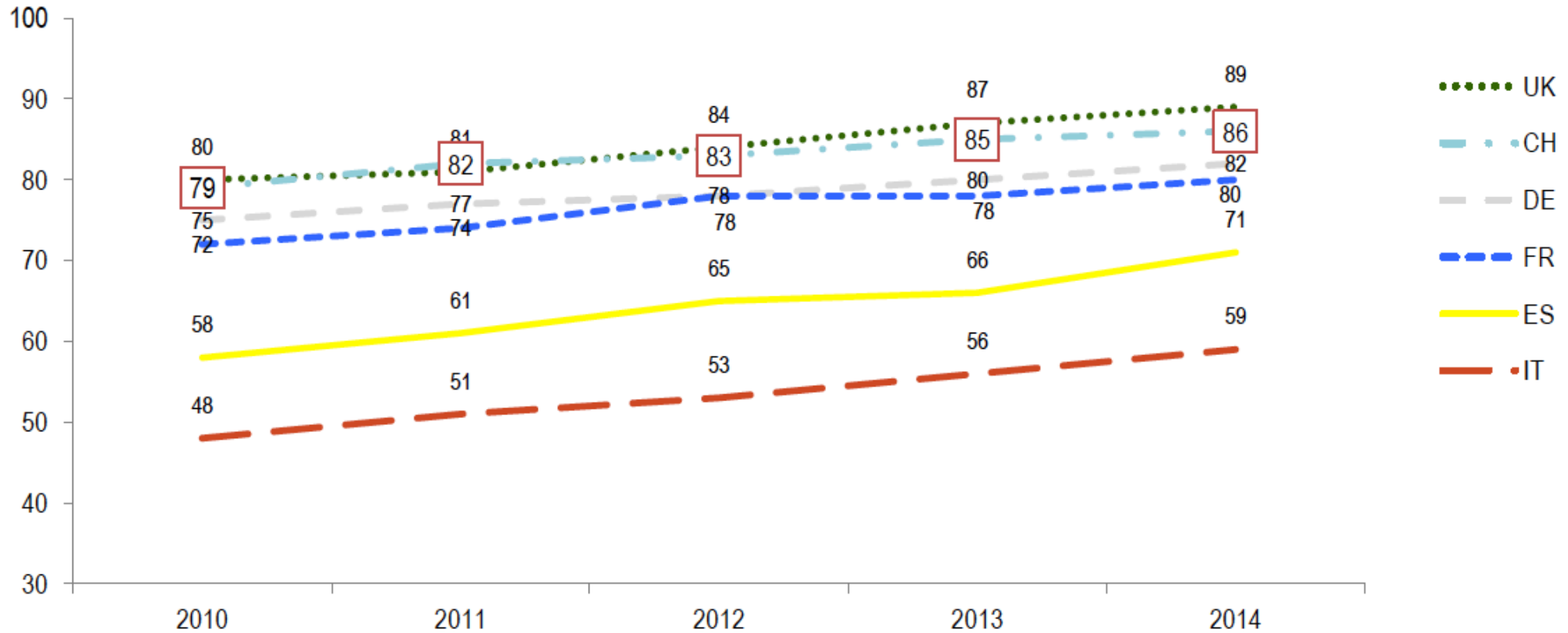
Source Emarketer, Ecommerce Foundation, 2015 (*countries covered by the study)

Global B2C e-Commerce Growth Rate

Percentage growth in B2C e-commerce turnover of countries covered, 2011 - 2015



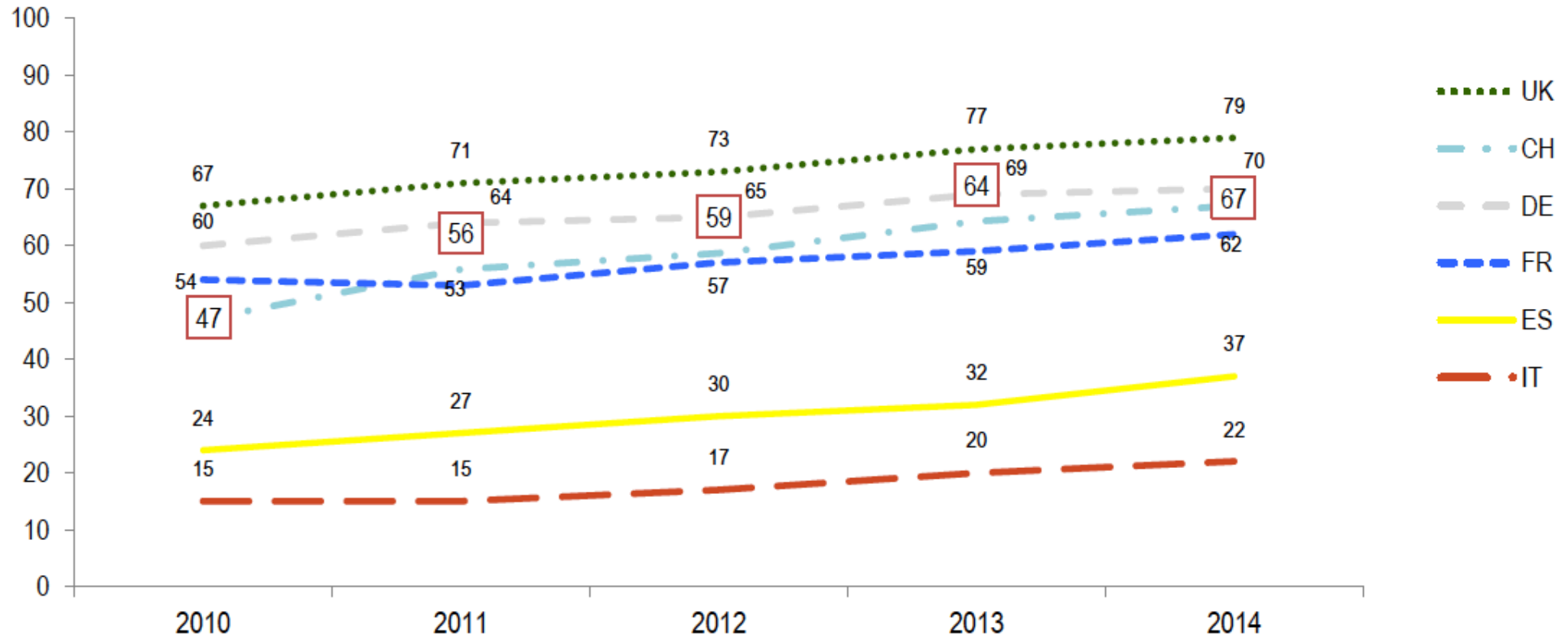
Internet Users in Europe



Base: 16-74 y.o. in Europe

Source: EUROSTAT/BFS data processed by ContactLab

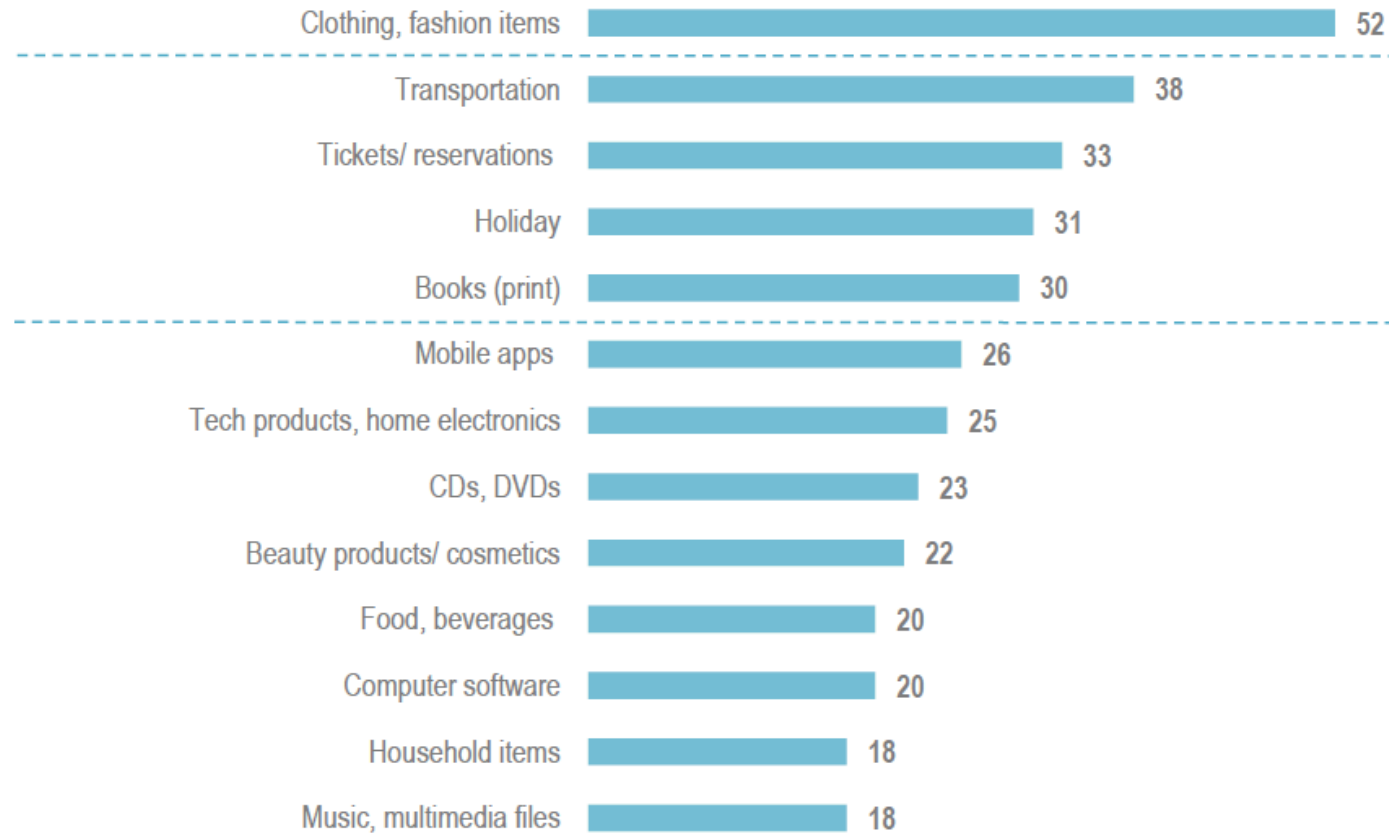
Online Shoppers in the Last 12 Months



Base: 16-74 y.o. in Europe

Source: EUROSTAT/BFS data processed by ContactLab

Product Categories Purchased Online in the Last 12 Months



Swiss Online Shoppers: 90% on internet regular users/ 4,7 M of ind.

Base: online shoppers 16-65 y.o. n=911 (90%), in Switzerland, %




Source: EUROSTAT/BFS data processed by ContactLab

Average Online Shopping Expenditure in the Last 12 Months

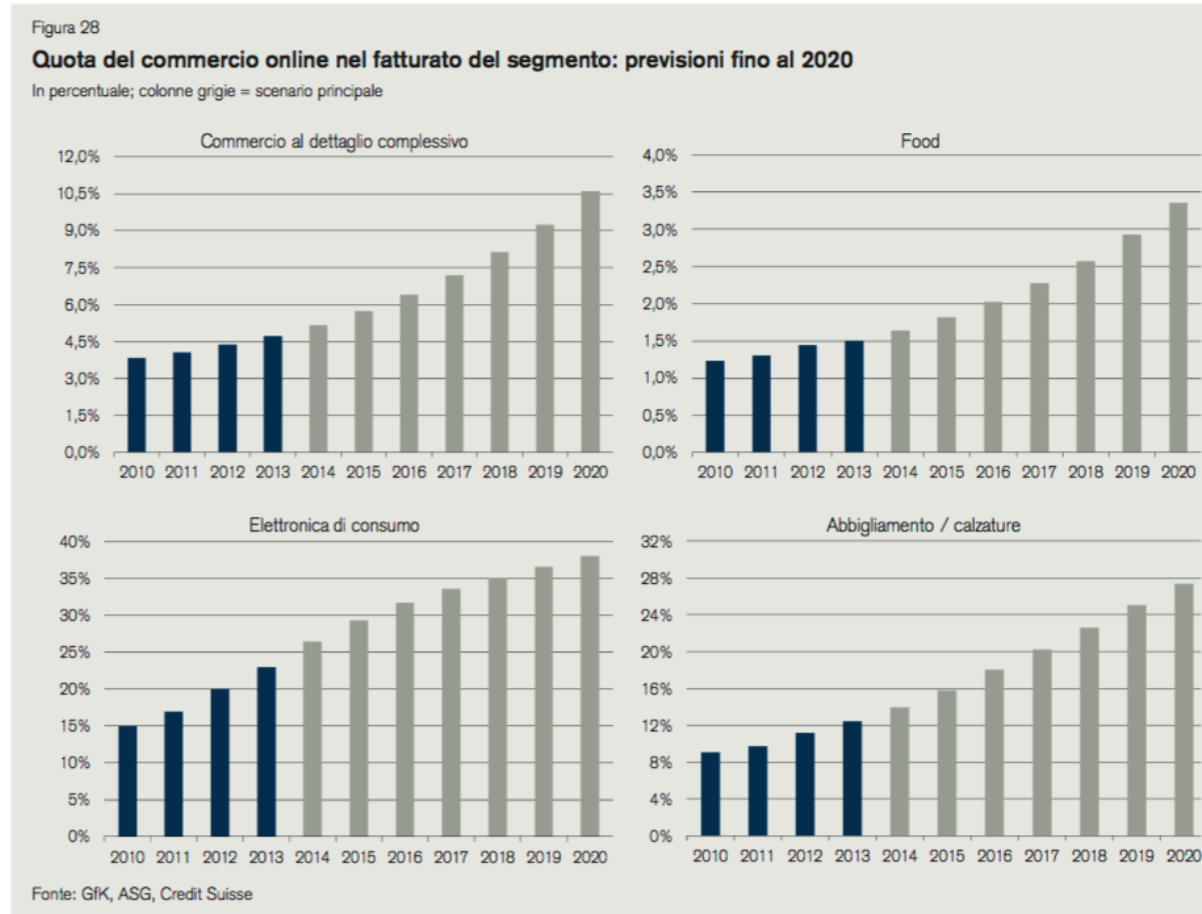
CATEGORIES	% PENETRATION	UNIVERSE (.000)	AVG ONLINE EXP. 12M (CHF)
Clothing, fashion items	52	2.704	535
Transportation*	38	1.976	886
Tickets/ reservations	33	1.716	332
Holiday*	31	1.612	1.241
Books (print)	30	1.560	146
Mobile apps	26	1.352	166
Tech products, home electronics	25	1.300	538
CDs, DVDs	23	1.196	198
Beauty products/ cosmetics	22	1.144	254
Food, beverages	20	1.040	480
Computer software	20	1.040	213
Household items	18	936	517
Music, multimedia files	18	936	102
E-books	16	832	143
Games of chance/ bets	16	832	317
Prints of photos, posters, etc.	15	780	124
Watches, jewelry	12	624	319
Sporting equipment	11	572	393
...
*Holiday / transportation (NET)	47	2.209	1.534

Switzerland: average annual online shopping: **1.946 CHF** / value of e-Commerce purchases: **9.1 B CHF** (values estimated on 27 inquired categories)

Average annual online shopping:

- IT : 1.200 € 
- UK: 1.962 € 
- DE: 1.299 € 
- FR: 908 € 
- ES: 1.046 € 

Source: EUROSTAT/BFS data processed by ContactLab



Source: Retail Outlook 2015 - Crédit Suisse, January 2015








2. Cross-Border Online Shopping

Why do you think people do **NOT** shop online?



Cross-Border Online Shopping: International View

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

	 IT	 UK	 DE	 FR	 ES	 SHA+GUA	 NY+LA
ONLINE SHOPPERS LAST 12 MONTHS (.000)	12.400	38.000	46.200	31.200	15.500	17.700	9.700
	n=7.042	n=952	n=964	n=877	n=623	n=997	n=995
CROSSBORDER 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

Source: EUROSTAT/BFS data processed by ContactLab

Top 10 Products Categories Purchased Cross-border

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

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

Source: EUROSTAT/BFS data processed by ContactLab

Cross-Border e-Commerce: General Reasons for Buying 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

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

Source: EUROSTAT/BFS data processed by ContactLab

3. Swiss e-Commerce Factor

Cross-Border Shoppers: Swiss Image of e-Commerce

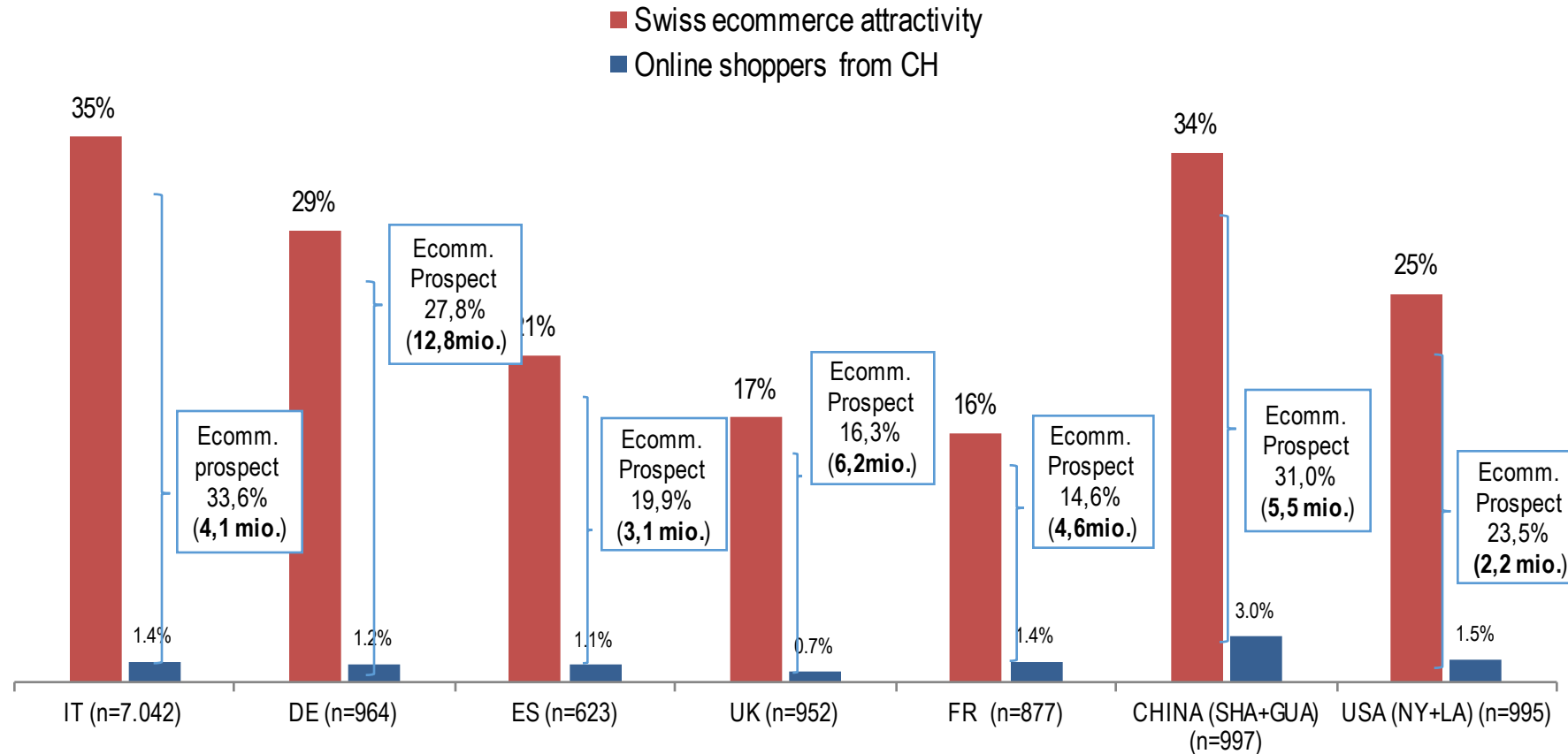
Thinking about online shopping, which of the following characteristics would you associate to Switzerland?

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

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

Source: EUROSTAT/BFS data processed by ContactLab

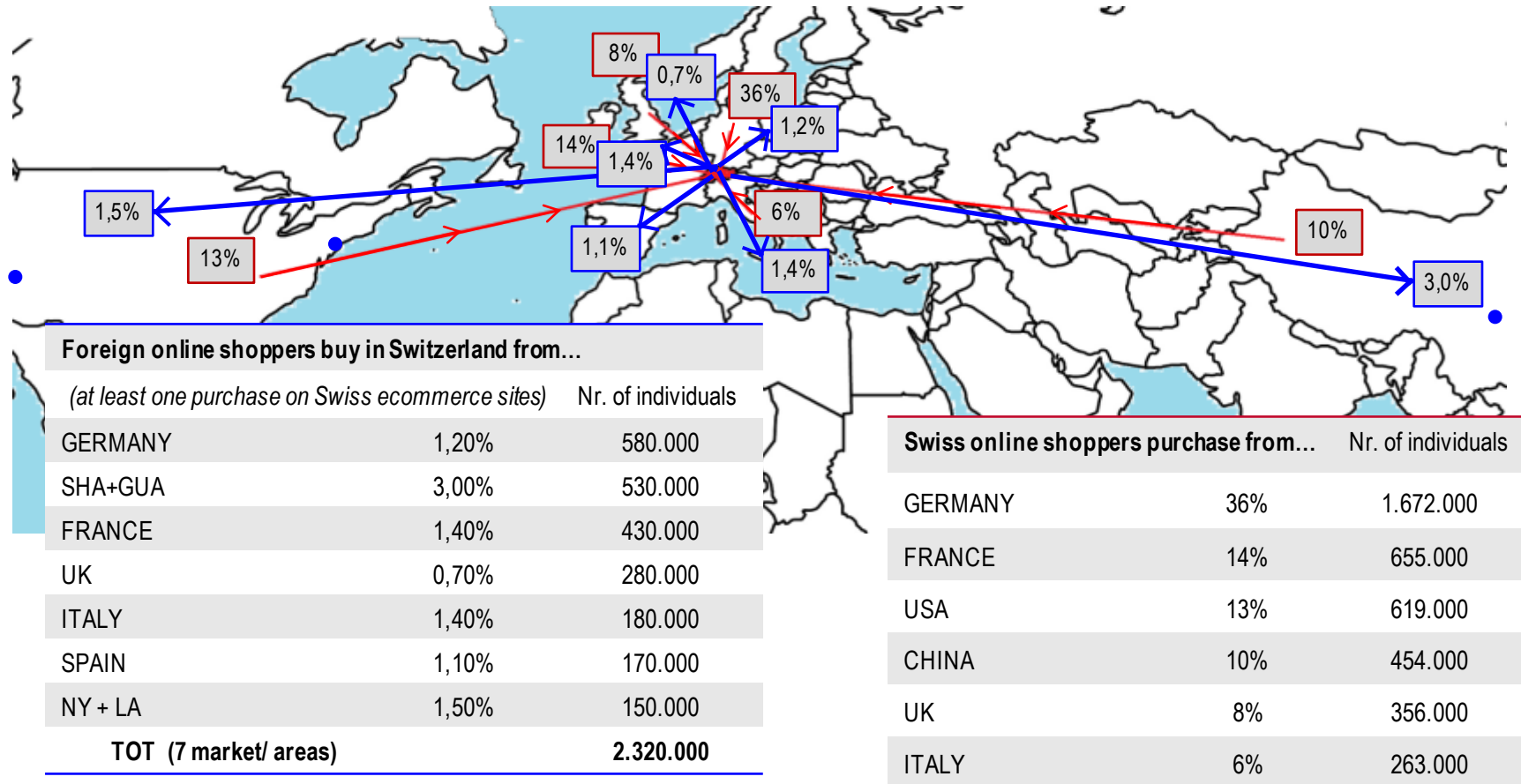
Swiss e-Commerce Export Potential



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

Source: EUROSTAT/BFS data processed by ContactLab














































































Cross Border e-Commerce: Export / Import Analysis



Base: online shoppers 16-65 y.o.

Source: EUROSTAT/BFS data processed by ContactLab

Promoters of Switzerland: 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

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

Source: EUROSTAT/BFS data processed by ContactLab

Data Sources



How to set up an e-Commerce platform?



Business Plan / KPIs



Fiscal / Legal /
Insurance



ICT/ Service Providers



Logistics



Marketing /
Communication