GEOPOST

SWITZERLAND REPORT

E-SHOPPER BAROMETER 2023

Extract: Out-of-Home delivery

METHODOLOGY

Sample

18+ y.o. European e-shoppers who have ordered physical goods online since January and then, received at least one parcel, identified within a sample representative of the national population in age, gender, and SEC.

For the consolidated results at European level, a weight was applied to each country in order to reflect the right proportion of e-shoppers between the European countries.

Key targets

- **Regular e-shoppers:**

E-shoppers aged 18 to 70 years old, who buy at least one product category every month online.

- **Aficionados:**

15% of the total e-shoppers with the highest number of annual online purchases.

METHODOLOGY

Data collection

- Online data collection (blind: interviewees do not know who requested the study)
- 24,233 interviews across 22 European countries (unweighted)
- Number of interviews per country (unweighted):

Austria:	1,005
Belgium:	1,003
Bulgaria:	1,014
Croatia:	808
Czech Republic:	1,035
Estonia:	801
France:	1,501
Germany:	1,506
Hungary:	1,014
Ireland:	1,003
Italy:	1,504
Latvia:	806
Lithuania:	804
Netherlands:	1,007
Poland:	1,570
Portugal:	1,006
Romania:	1,015
Slovakia:	1,009
Slovenia:	809
Spain:	1,502
Switzerland:	**1,009**
UK:	1,502

Fieldwork

Fieldwork conducted from May 31st to July 19th, 2023

LEGEND FOR EVOLUTIONS

Significant differences

between 2023 and 2022 / 2021 scores are shown as follows (at 95% confidence rate)

when **positive**:	+XX ▲	vs 2022	+XX ▲	vs 2021
when **negative**:	-XX ▼	vs 2022	-XX ▼	vs 2021

with +/- xx the number of points difference vs. 2023.

No arrows if no significant difference.

REGULAR E-SHOPPERS

TOP DELIVERY PREFERENCES

Being informed on delivery in real time becomes Swiss regular e-shoppers' top expectation, being offered several delivery options has gone up 2 ranks, reaching the top 3 delivery preferences in Switzerland.

Delivery preferences (importance index – average interest = 100)

	139	133	132	125	118	118	102
	Real time info on delivery	Select day and one-hour window delivery in advance	Several delivery options	Next day delivery	Possibility to reschedule delivery	To receive advanced notifications with a 1 hour time window	To be delivered in a selectable 2-hour window in the afternoon
	152	134	143	125	126	118	94
RANKING IN 2022	#2 +1	#1 -1	#5 +2	#4	#3 -2	#6	#8 +1

C16new – What delivery options are important to you when choosing an online retailer?
Please select one option that is THE MOST IMPORTANT, and another one that is the LEAST IMPORTANT to you.
Rq: Maxdiff module – the items are displayed 4 at a time on 8 different screens, each time the respondent selects the most and least important

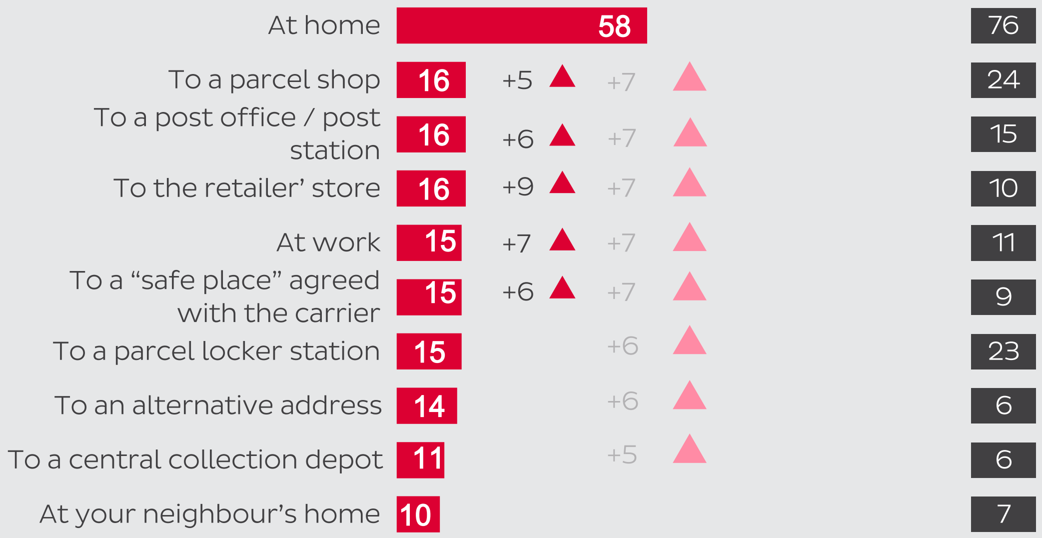
XX European average

REGULAR E-SHOPPERS

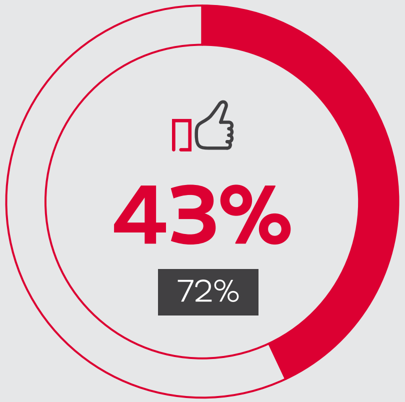
DELIVERY PREFERENCES

Swiss regular e-shoppers are using more delivery places than in 2022, far and foremost at home delivery but they are more to use OOH options. However, most of them perceive the delivery as requiring effort.

Usual delivery places-%



1.9 1.9 Delivery places on average +0.28▲ +0.3▲



... found delivery easy/effortless

+14▲ +20▲

51% 51%

Usually use more than one delivery place

+14▲

38% 44%

Are delivered out of home (parcel locker, parcel shop or retailer store)

XX European average

D14. How much effort did you have to put into the delivery (e.g. tracking, picking up, receiving, etc...) of your last online purchase?
C14. Where do you usually have your parcels delivered to?

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REGULAR E-SHOPPERS – FOCUS ON OOH USERS

OUT OF HOME USERS PROFILE

Male

66% **44%**

Income

71% **42%**

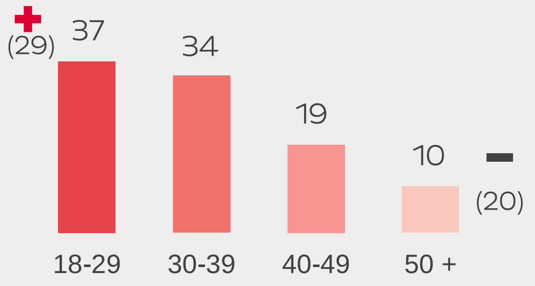
+17 ▲

Upper

Age

▬ (38.7)

35.5 y.o **41.2**



Marital status

✚ (48) 57% +22▲	Married	**45%**
30%	Single	**31%**
11% -10▼	Cohabitation	**16%**
1%	Divorced	**6%**

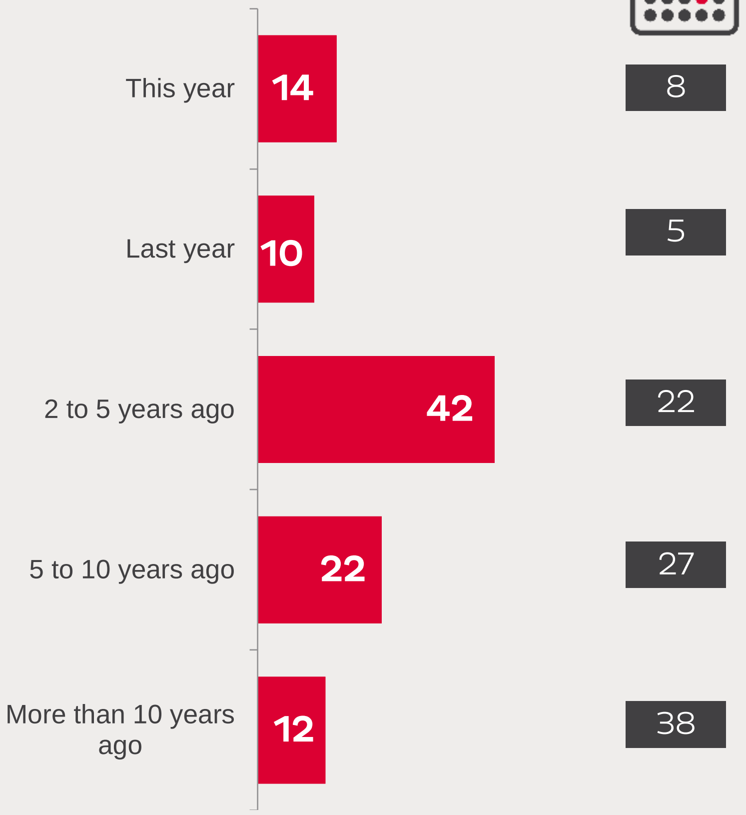
City size

✚ (89)

95% **88%**

Urban

Started purchasing online ...



XX European average

✚ ▬ vs. regular e-shoppers (xx) at 95% confidence rate

Significance test vs. 2022 only

N=201
RS1; RS2; RS2RECAP; RSX; S2; C1

REGULAR E-SHOPPERS – FOCUS ON OOH USERS

ONLINE PURCHASE HABITS & ATTITUDES

OOH users buy as much product categories as the regular e-buyers overall. They are more connected, trend seekers and informed than regulars.

6.2 6.4

Different types of goods bought since January on average

Top 7 Categories

1. Shoes **42%**	53%
2. Grocery **41%**	32%
3. Beauty & Health care **40%**	51%
4. Leisure **38%**	38%
5. White goods **36%**	26%
6. High Tech **35%**	30%
7. Accessories and jewellery **35%**	30%

Attitudes specificities vs. regular e-shoppers

(biggest significant gaps vs. regular e-shoppers on % agree & strongly agree)

Positive ✚

56% I am now less loyal to any offline or online retailer, because I like to shop around more to find the best offers (45)	46%
57% Relative to other people I have more passion about e-shopping (44)	45%
45% I am almost always among the first to try new ways of shopping or new shopping experiences (37)	37%
59% I prefer to buy well-known brands (49)	55%
57% I prefer to shop on websites/apps that also have physical stores (47)	47%
49% It is very important for me to buy trendy brands (39%)	31%
61% I actively look for reviews and ask for recommendations online (50%)	61%

+19 vs. regular e-shoppers

-14 vs 2022

71 44

Annual number of purchases

/!\ No significance test on median

14.7% 15.9%

Average share of online shopping

(on total shopping – average of all categories)

XX European average

✚ ━ vs. regular e-shoppers (xx) at 95% confidence rate

N=201
A1;A5;SC2;G11