



PRESENTATION OF STUDY

Presentation of Study

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 regarding **consumers' relationship with internet** are 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 ecommerce is accurately represented in each market area.

Particularly, the present analysis is focused on the **potential of Switzerland in ecommerce**, providing a fundamental contribution to understand the attractivity and values that this country can convey to 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 extra-European selected markets: Shanghai, Guangzhou, New York and Los Angeles.

Switzerland has an high diffusion of ecommerce that grows steadily: today the 4.7m online shoppers 16-65 y.o. represent the 85% of national population 16-65 y.o.

Therefore, for a faster growth of Swiss it needs to expand it abroad, toward those market-areas where segments of **Swiss promoters** are identifiable.

The study identified 25% of promoters, on average across the different market areas, it means there are some millions of online shoppers could be strongly interested to buy products with a Swiss origin disclosure.

This is an huge opportunity could be grabbed by Swiss companies.

For giving a concrete support, this analysis offers a focus in each market area, to understand which are the **digital touchpoints to leverage** for setting up a specific digital marketing strategy.

* the ContactLab's Market Research department conducts yearly The European Digital Behaviour Study (EDBS) out by which oversaw this analysis for Netcomm Suisse. Since 2009, the EDBS offers a full and in-depth analysis of internet consumers.

Executive Summary

➤ The Crossborder Shopping: an opportunity for internationalization through ecommerce

Ecommerce is growing in all countries, faster in those market areas where the internet was penetrated late (Spain, Italy, new comers).

At the same time, also in the online mature countries (northern Europe and US), the digital behaviour is changing quickly, giving a further acceleration to the online shopping.

Particularly, today the **smartphone is the first device for pervasivity**, not yet an exclusive device, so the consumer's evolving in always connected and this impact on the relationship with the brands.

The **online channel is cross-border by definition**, mainly in order to the unlimited possibility to research information about products, brands and companies.

Nevertheless, for finalizing the online purchasing, the shoppers elect the **channel more effective to minimize any problems or doubts**: "afraid of not receiving the product", "costs of shipping and handling too high", "trust in online payment methods", etc.

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

- In Spain, the 66% of total online shoppers are crossborders; followed in Europe by Italy (58%), France (49%), Uk (37%) and Germany (32%)
- thanks to the bigger ecommerce market, the main segment by expenditure on foreign sites is in Uk (around \$ 10 bn) , followed by the other European countries (\$ 4 bn on average)
- also in China and in Us, crossborders is a big segment, where it's possible to estimate around \$ 4,3 bn only considering the areas of Shanghai/ Guangzhou for China and NY/LA for US

abroad, the online shopper doesn't shop only for a better price, but also because some products aren't available locally and for having better online services: selection of products, visiting/ shopping experience, reliability of payment methods, etc.

For a international ecommerce player there's the opportunity to **disclose own country origin** when this conveys attractivity and values satisfying the consumers' needs.

The following analysis refers properly to the **Swiss Factor for internationalization of ecommerce**.

Executive Summary

↪ Swiss Factor for internationalization of ecommerce

The Observatory Netcomm Suisse shows a steadily growth in the national ecommerce market: today the 4.7m online shoppers 16-65 y.o. (the 85% of national population in the range 16-65 y.o.) buy CHF 9 bn of products and services. A significant part of this, the 28% of total online expenditure (35% of crossborder online purchasing) goes abroad, an high ratio if compared with other countries.

Therefore, an ecommerce Swiss player has to serve better own internal market but for a faster growth, it needs to catch the opportunity of **internationalization of online sales**.

Switzerland is a country highly recommendable for online shopping, thanks to the recognizing of: **high quality of products, trustworthiness of online services/ websites, timeliness of delivery and payment security**.

Main values recognized by over 30% of international crossborders on average, even if there are specific **image perceptions**:

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

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

Across the different sampled market-areas, the 25% of online shoppers is "Swiss promoter", it means strongly attracted by an online Swiss offer.

Potentially, Swiss ecommerce could draw new shoppers within huge catchment areas:

- 12,8 millions in Germany
- 6,2 millions in Uk
- 5,5 millions in China (only considering Shanghai + Guangzhou)
- 4,6 mio in France, 4,2 mio in Italy, 3,1 mio in Spain, 2,3 mio in Us (only considering NY + LA)

Executive Summary

Swiss e-commerce factor: how to leverage it in Europe

Potentially, there are around 30 millions of European online shoppers strongly attracted by an online Swiss offer.

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

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

Considering the German online shoppers as benchmark to define a marketing strategy for ecommerce internationalization, a Swiss ecommerce player should:

- understand the digital behaviours of each category buyers (e.g. in technology arena, the internet users are typically email centric)
- concentrate the digital effort on digital direct activities and videos, more than on social, mainly for mobile users
- offer a wide range of products ready for sending
- set an online experience store-like, because this segment loves this channel
- offer more and different payment possibilities, surely paypal, but also bank transfer and invoice

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

- 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 ecommerce trend is very stable, the private sale is the preferred channel
- In UK, the internet users are “hyper-actives” so it’s necessary to cover many digital media and channels
- In Spain, where users are much involved in social networking, there’s the research of branded product at better price

Executive Summary

➤ Swiss e-commerce factor: how to leverage it for extra-European market – areas

Chinese online shoppers are very similar to Germans for propensity to Swiss ecommerce and for the values recognized to this country.

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

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

- the level of enthusiasm for digital is the highest, for example the **QR code is very appealing**; on the contrary, the fanpage seems a owned medium more difficult to manage
- all contents for pushing online shopping have to be **thought for smartphone**, because this is one of the main devices (as it's becoming in all the rest of the world)
- probably, this target is omnivore of any kind of products, with acritical approach at the first step; afterwards the relationship must be managed as in other markets
- **the competition is very intensive** on this market

In US, considering the big areas of NY and LA, a player faces with the most advanced in the world with regards to the use of internet/ ecommerce platform and multimedia exposure.

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

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

Knowing that, today, a large part of crossborder shoppers looks at uniqueness of products

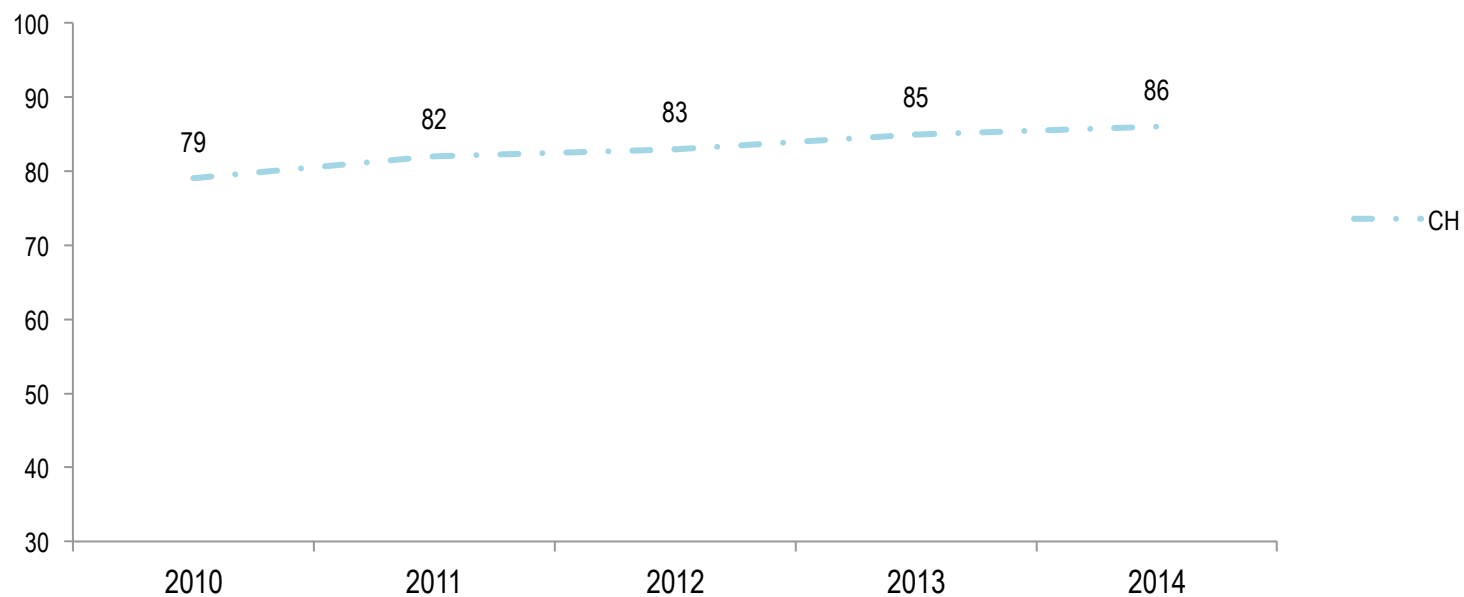
So it's confirmed, thanks to Us as top benchmark, the opportunity to disclosure the country origin / without hesitation.



INTERNET AND ECOMMERCE EVOLUTION

SPREAD OF THE INTERNET IN SWITZERLAND

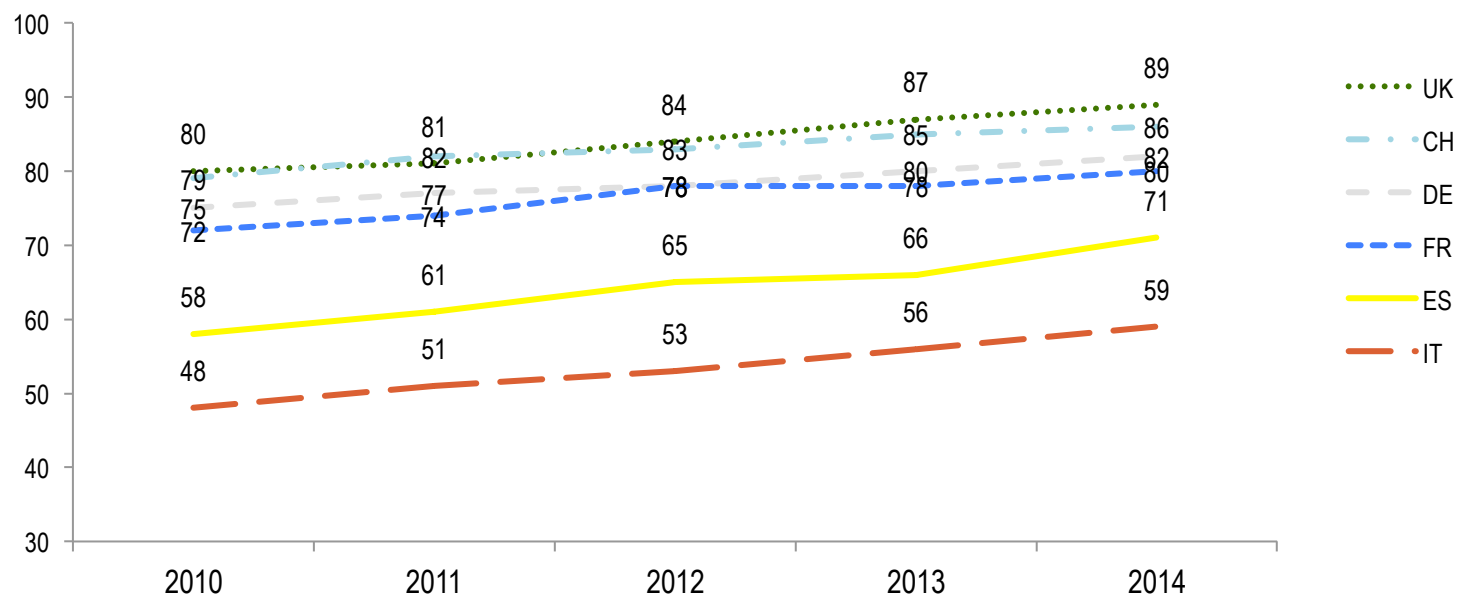
Source: EUROSTAT/ BFS data processed by Contactlab



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

REGULAR* INTERNET USERS AGED 16-74 IN EUROPE

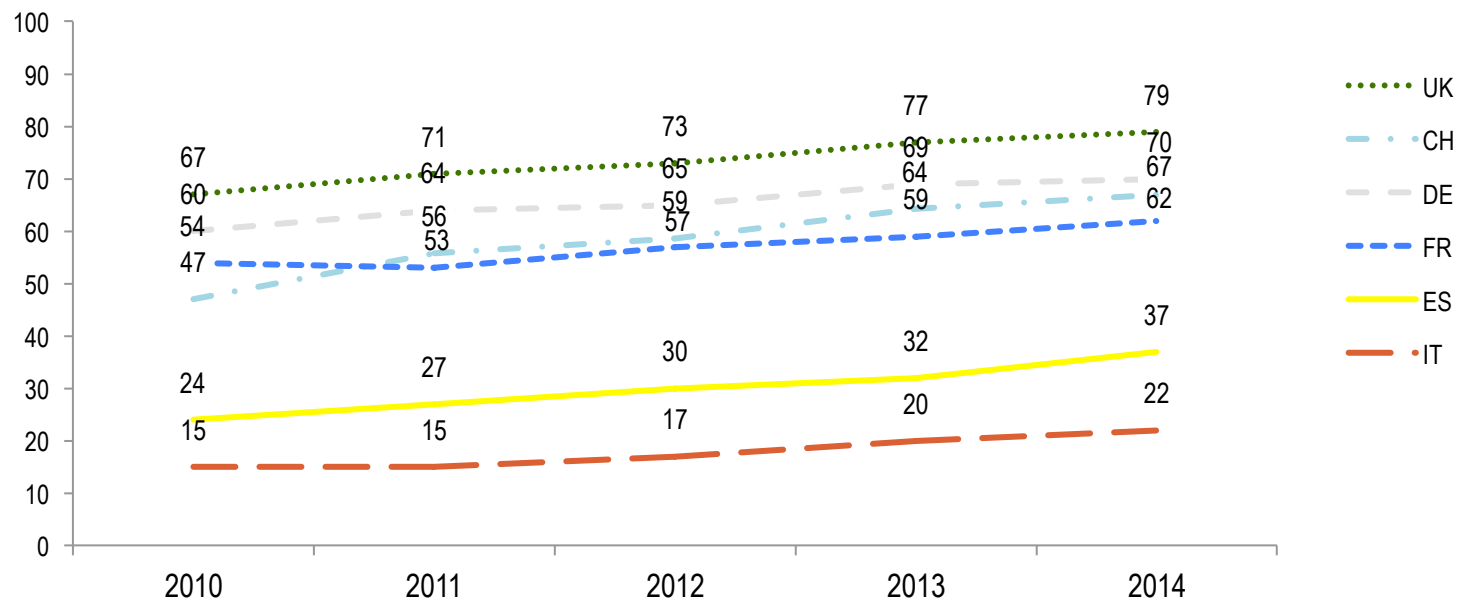
Source: EUROSTAT/ BFS data processed by ContactLab



* 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)

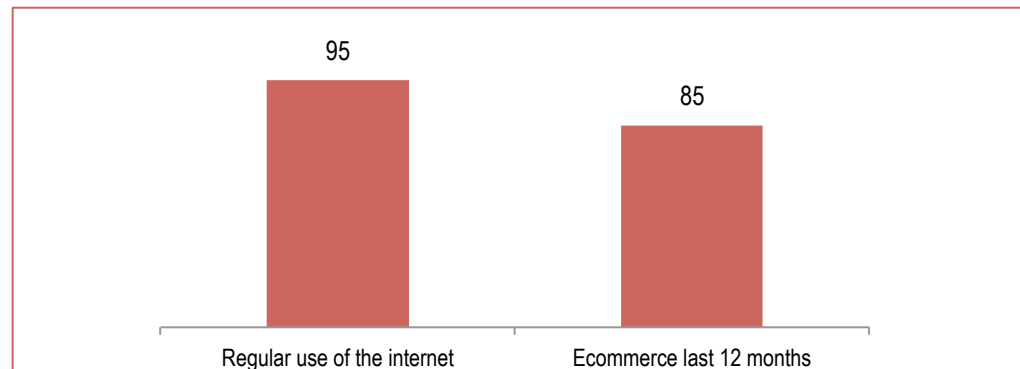
BFS – Use of the internet for purchases/ orders for goods and services (CH 2010)

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

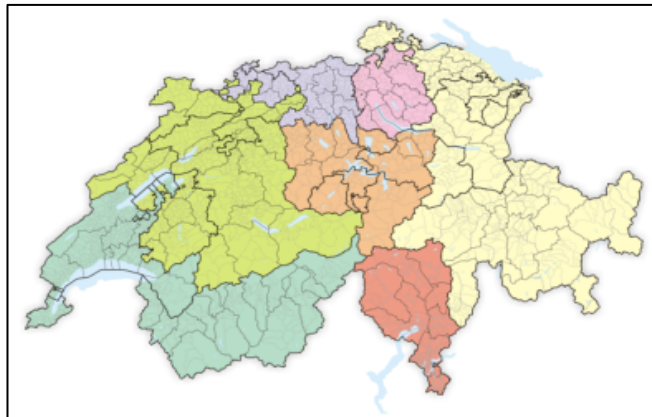
Source: EUROSTAT/ BFS data processed by ContactLab

	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**: 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 - 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)	IT	UK	DE	FR	ES	SHA+GUA	NY+LA
	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
EXPENDITURE ON FOREIGN E-SITES (% on total ecommerce expenditure)	25%	24%	16%	21%	34%	23%	36%
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., %

	 IT	 UK	 DE	 FR	 ES	 SHA+GUA	 NY+LA
CROSS BORDERS ONLINE SHOPPERS (.000)	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?

	 IT	 UK	 DE	 FR	 ES	 SHA+GUA	 NY+LA
CROSS BORDERS ONLINE SHOPPERS (.000)	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?

	 IT	 UK	 DE	 FR	 ES	 SHA+GUA	 NY+LA
CROSS BORDERS ONLINE SHOPPERS (.000)	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, %

	 IT	 UK	 DE	 FR	 ES	 SHA+GUA	 NY+LA
CROSS BORDERS ONLINE SHOPPERS (.000)	58%	37%	32%	49%	66%	41%	42%
	7.200	14.000	14.800	15.300	10.300	7.200	4.100
	n=3.734 %	n=303 %	n=286 %	n= 385 %	n=381 %	n=386 %	n=378 %
PREFERRED PAYMENT METHODS:							
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 FOR ECOMMERCE

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

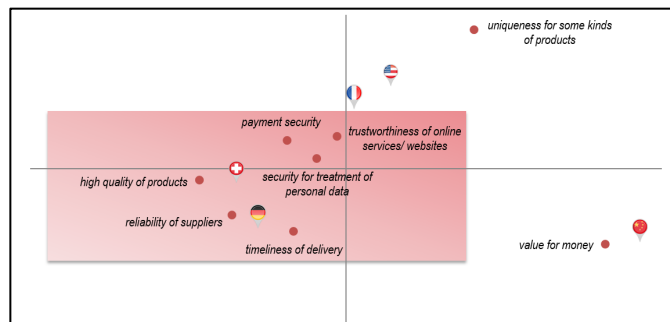
Thinking about online shopping, which of the following characteristics would you associate to Switzerland?

	 IT	 UK	 DE	 FR	 ES	 SHA+GUA	 NY+LA
CROSS BORDERS ONLINE SHOPPERS (.000)	58% 7.200	37% 14.000	32% 14.800	49% 15.300	66% 10.300	41% 7.200	42% 4.100
	n=3.734 %	n=303 %	n=286 %	n= 385 %	n=381 %	n=386 %	n=378 %
SWISS IMAGE FOR ECOMMERCE:							
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

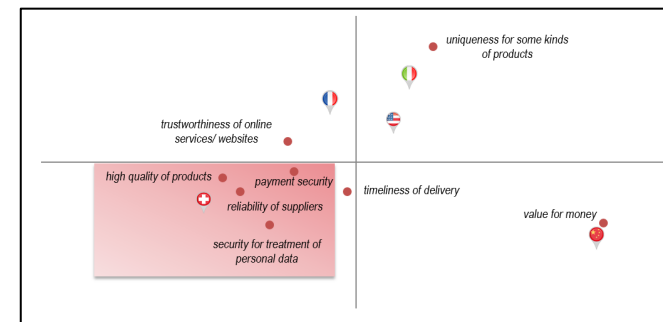
MAP OF ECOMMERCE COUNTRY IMAGE (1/ 2)

Base: users aged 16-65 shopping online; correspondence analysis

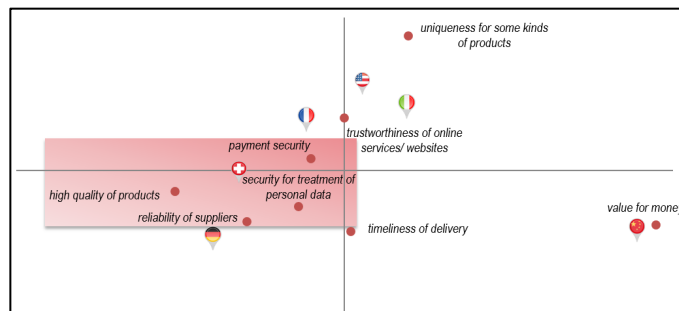
ITALIAN MARKET



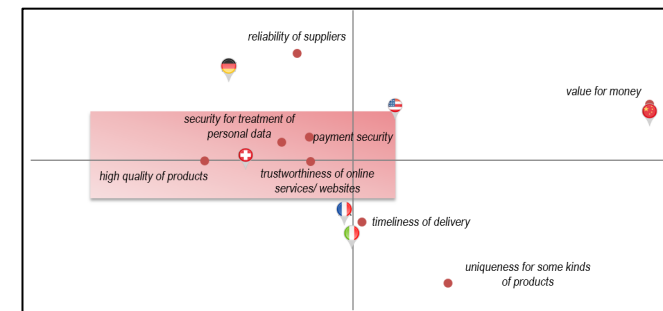
GERMAN MARKET



SPANISH MARKET



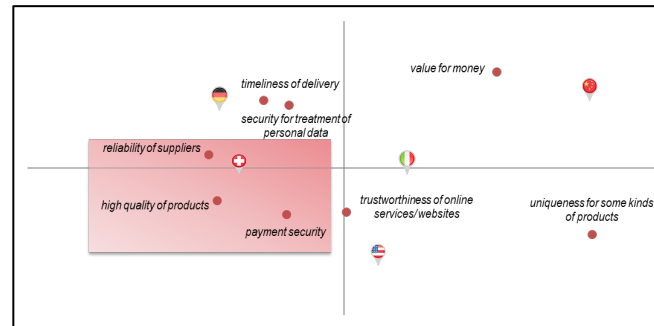
UK MARKET



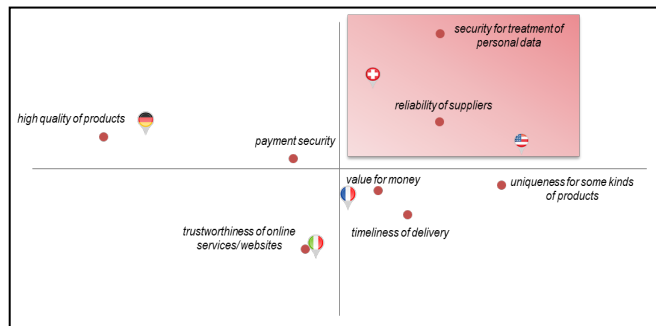
MAP OF ECOMMERCE COUNTRY IMAGE (2/ 2)

Base: users aged 16-65 shopping online; correspondence analysis

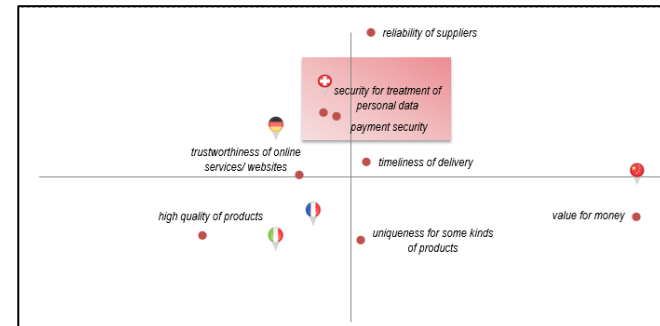
FRENCH MARKET



CHINESE MARKET



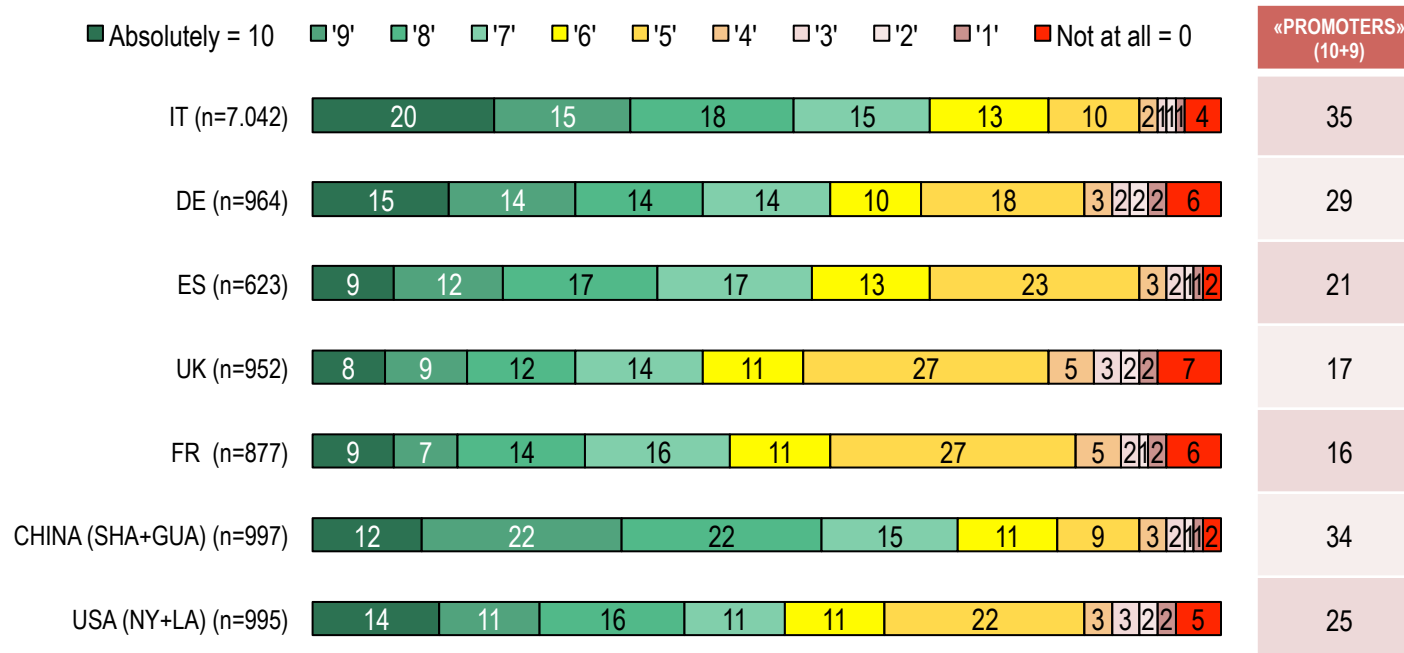
US MARKET



SWISS ECOMMERCE ATTRACTIVITY FOR FOREIGN ONLINE SHOPPERS

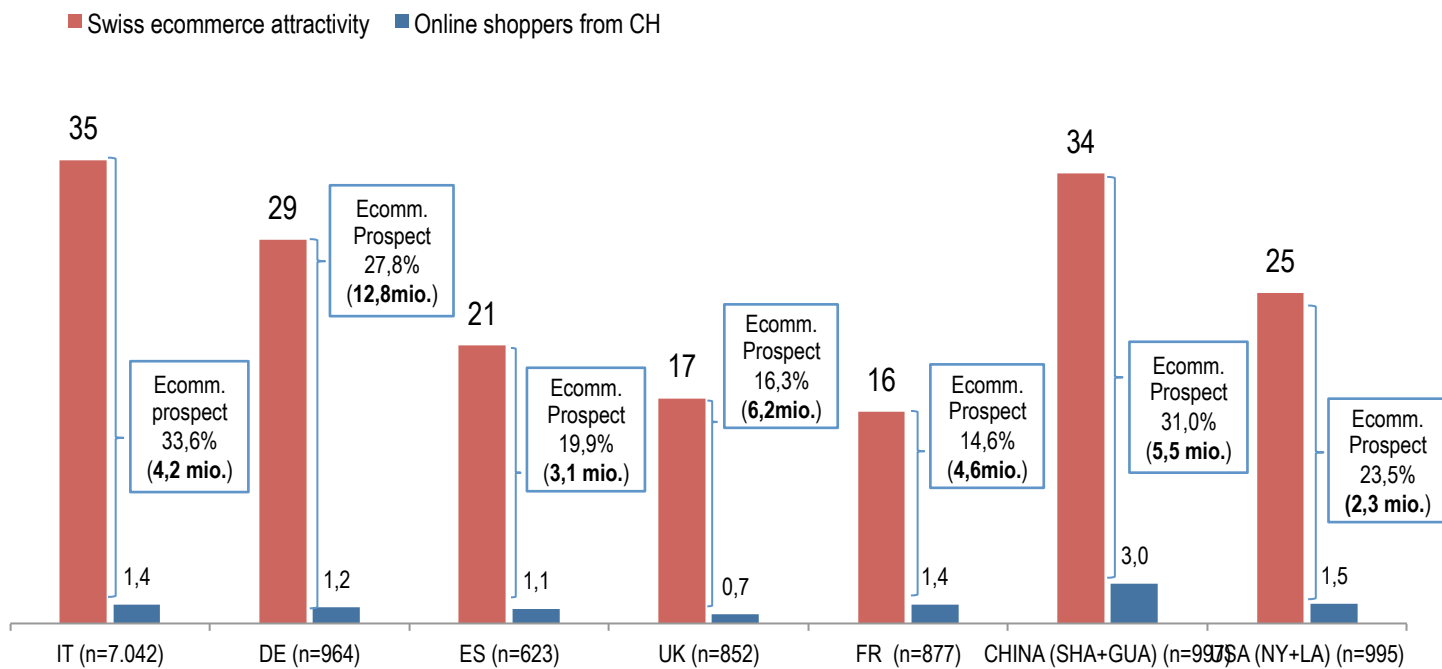
Base: users aged 16-65 shopping online in the last 12 months in each country, %

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










SWISS ECOMMERCE EXPORT POTENTIAL








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










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	UK	DE	FR	ES	SHA+GUA	NY+LA
	n=2.398 %	n=161 %	n=282 %	n=142 %	n=130 %	n=350 %	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





CROSSBORDER SHOPPERS FROM 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



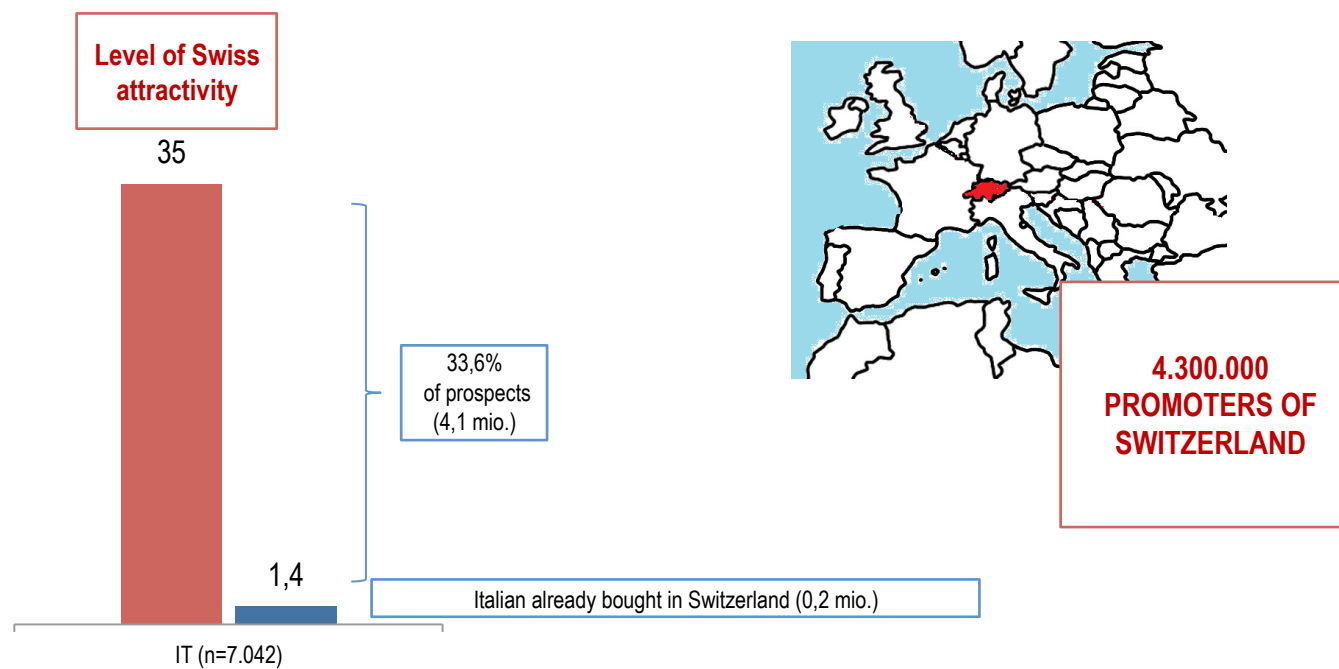
**PROMOTERS OF
SWITZERLAND 35%**

**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-governement, 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; %





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?

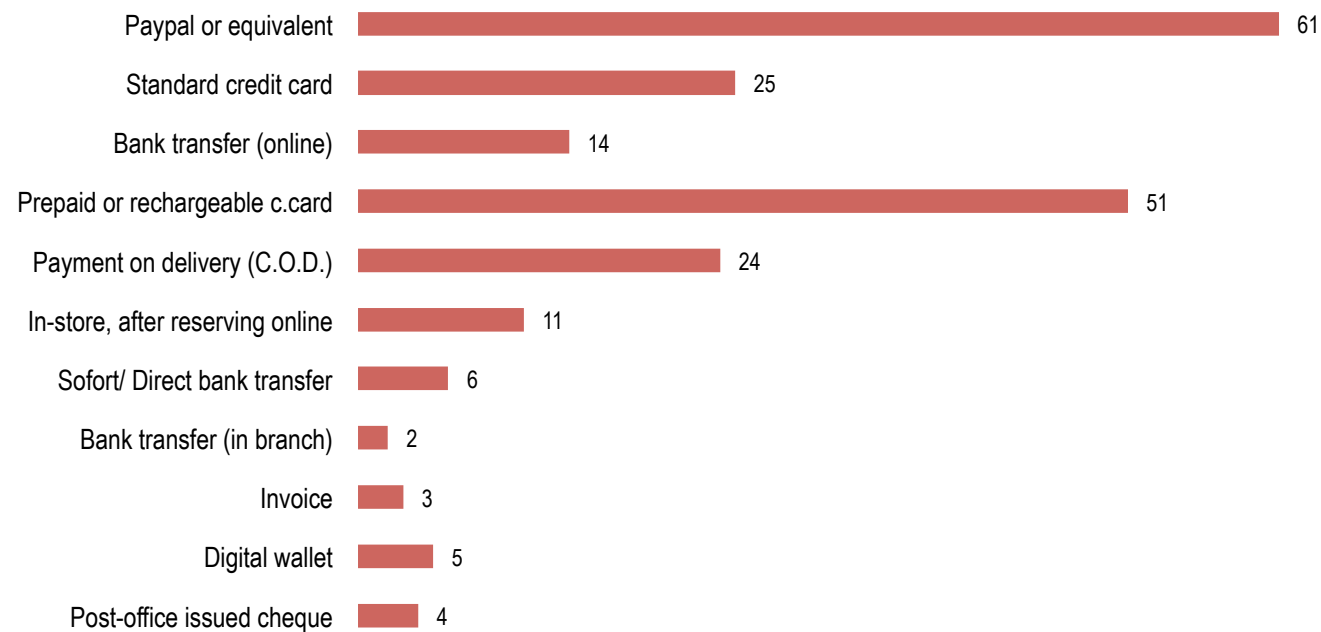




PROMOTERS OF SWITZERLAND: PREFERRED METHODS OF PAYMENT

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?

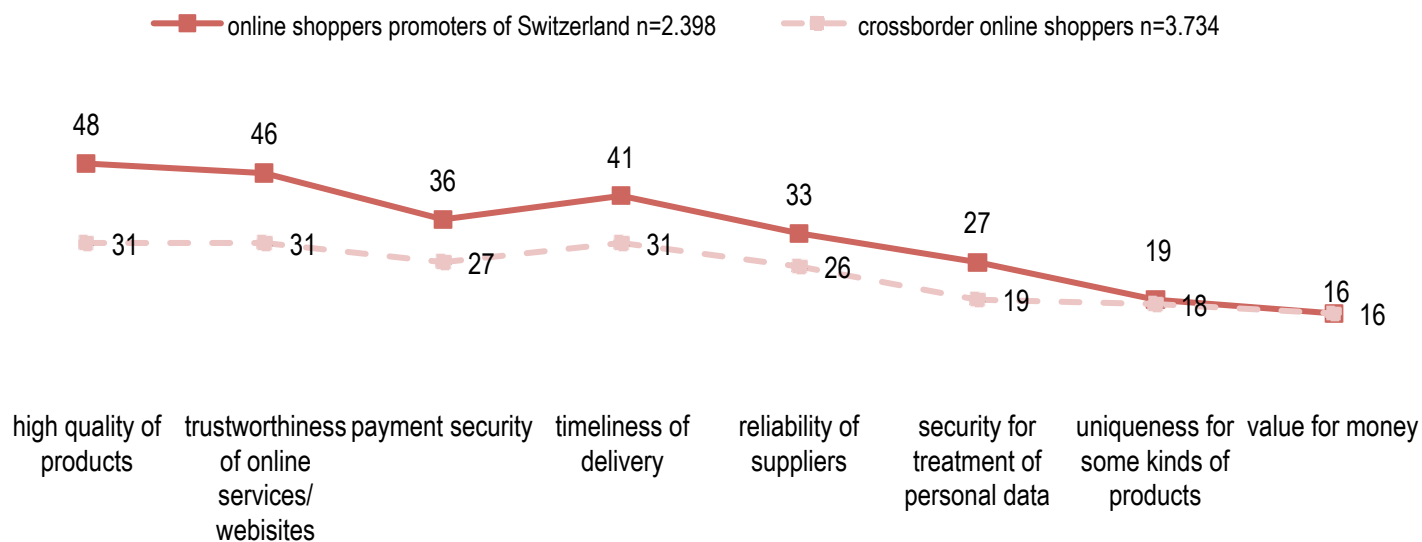




PROMOTERS OF SWITZERLAND: SWISS IMAGE FOR ECOMMERCE

Base: users aged 16-65 Italy; %

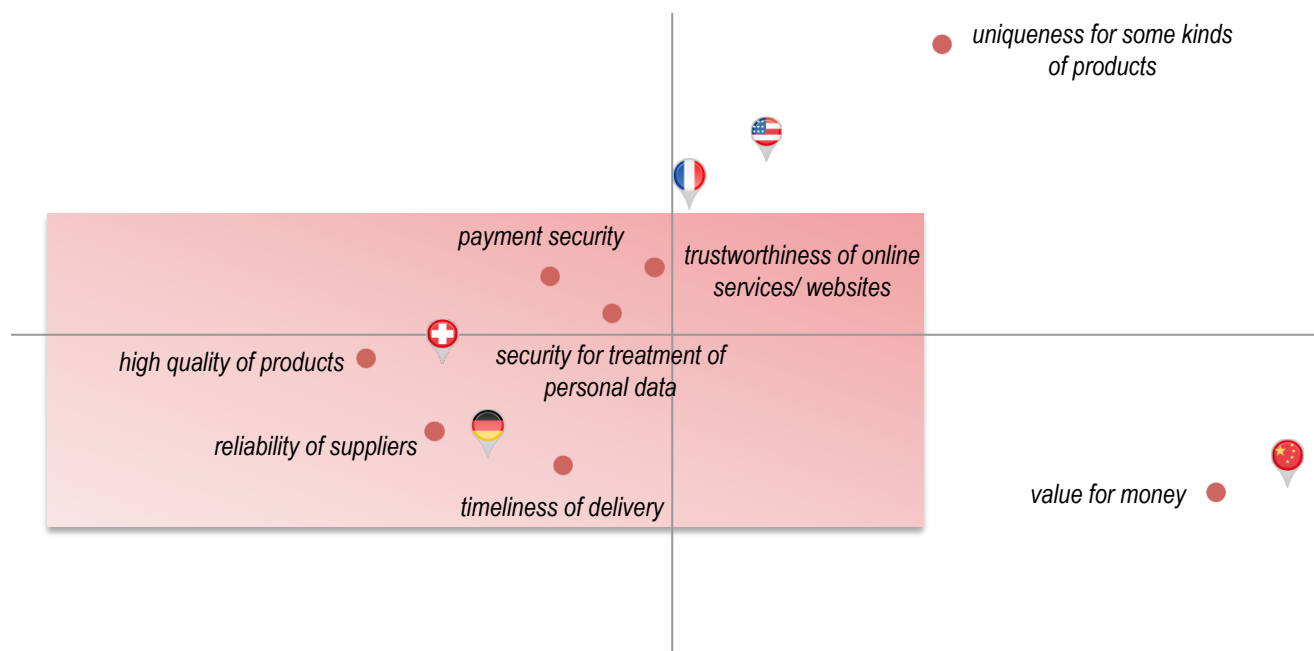
Thinking about online shopping, which of the following characteristics would you associate to Switzerland?





MAP OF ECOMMERCE COUNTRY IMAGE

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



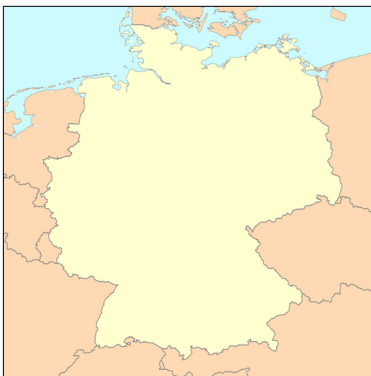


SWISS FACTOR IN GERMAN MARKET



CROSSBORDER SHOPPERS FROM 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)

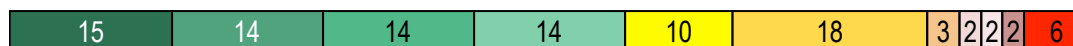


SWISS PROMOTERS IN GERMANY

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



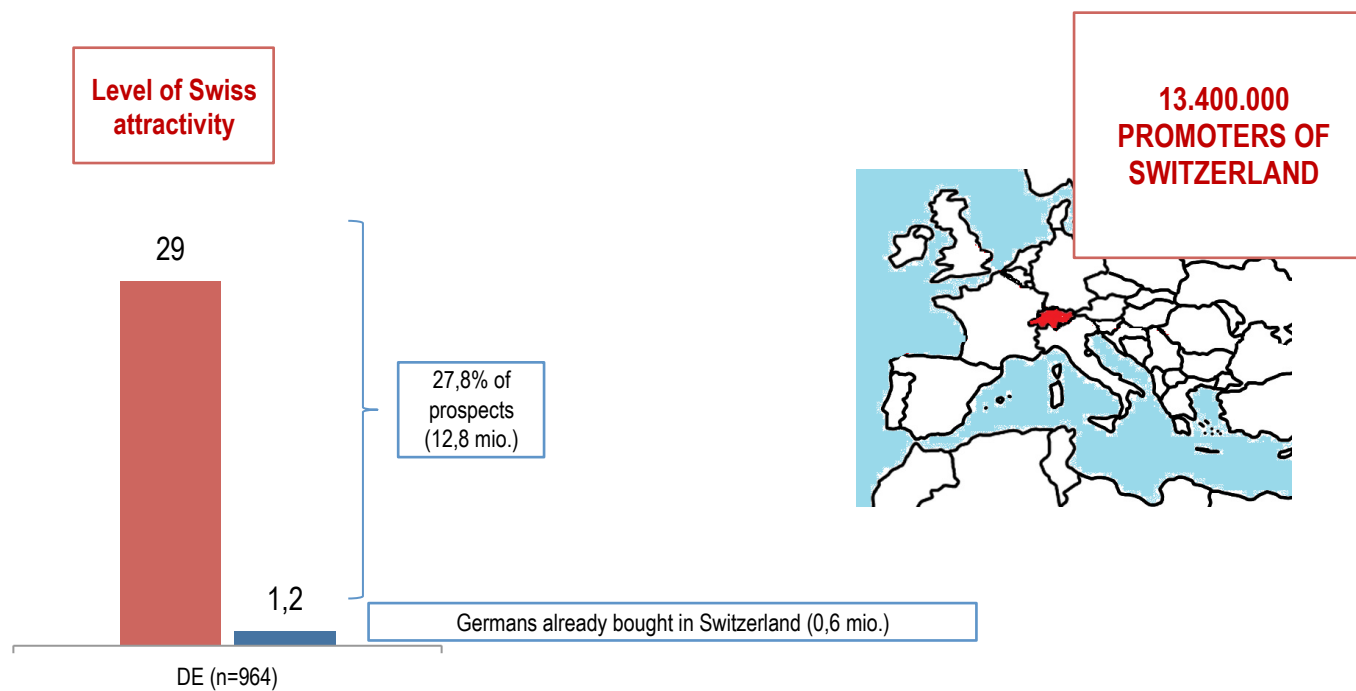
**PROMOTERS OF
SWITZERLAND 29%**

**REJECTORS OF
SWITZERLAND 43%**



SWISS ECOMMERCE EXPORT POTENTIAL IN GERMANY

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



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; %





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?

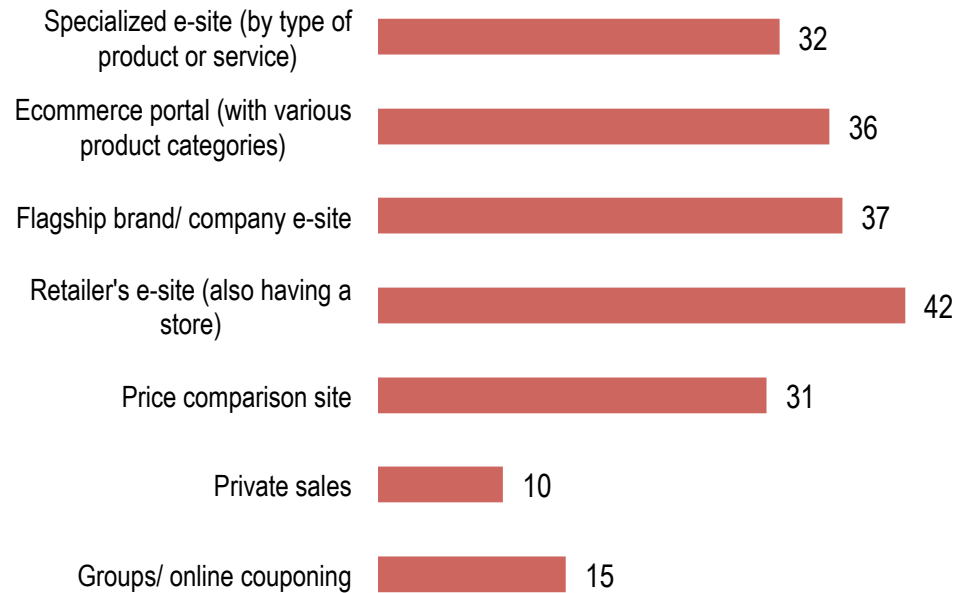




PROMOTERS OF SWITZERLAND: FAVOURITE ECOMMERCE CHANNELS

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?

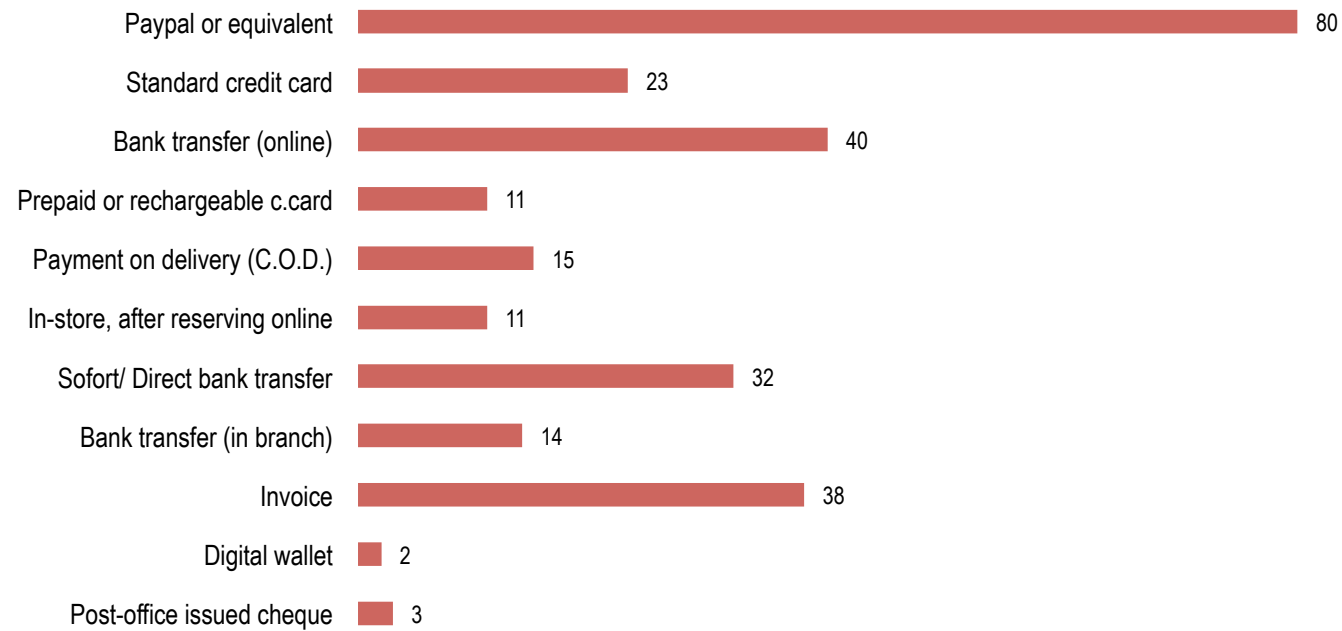




PROMOTERS OF SWITZERLAND: PREFERRED METHODS OF PAYMENT

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?

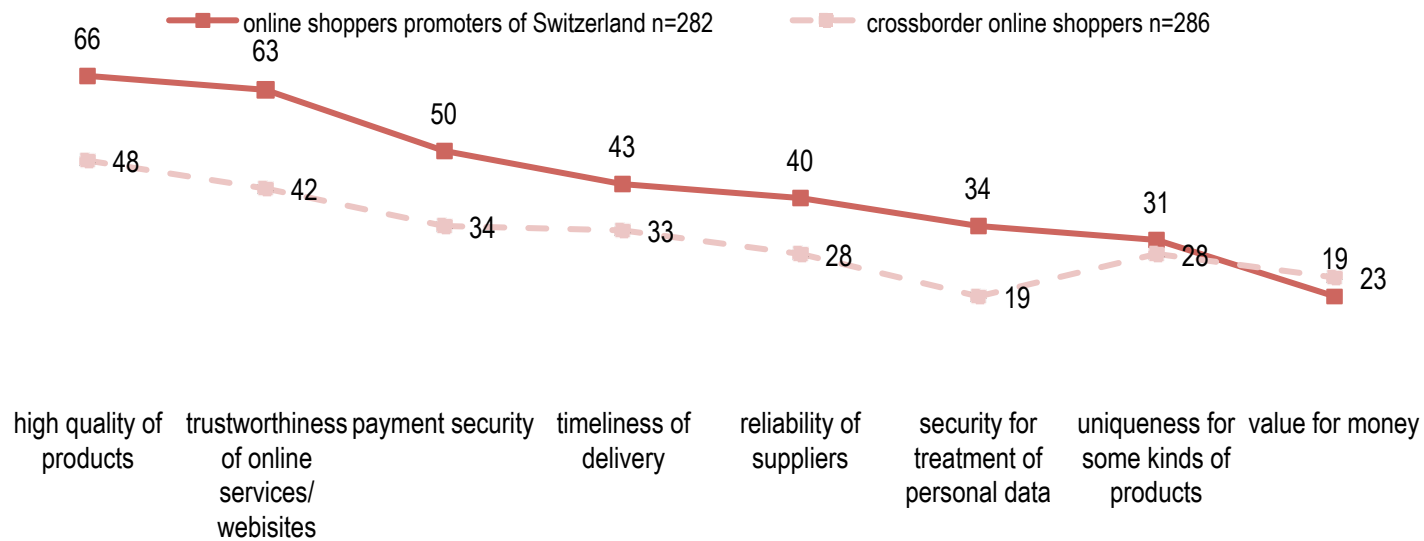




PROMOTERS OF SWITZERLAND: SWISS IMAGE FOR ECOMMERCE

Base: users aged 16-65 Germany; %

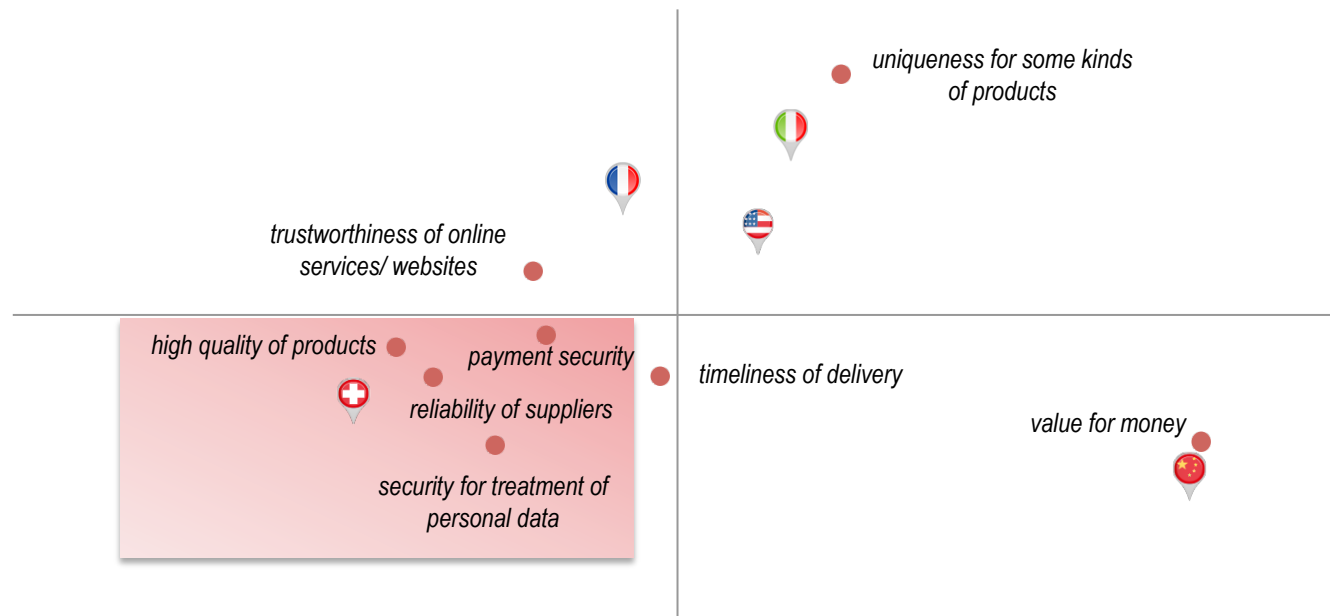
Thinking about online shopping, which of the following characteristics would you associate to Switzerland?





MAP OF ECOMMERCE COUNTRY IMAGE

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



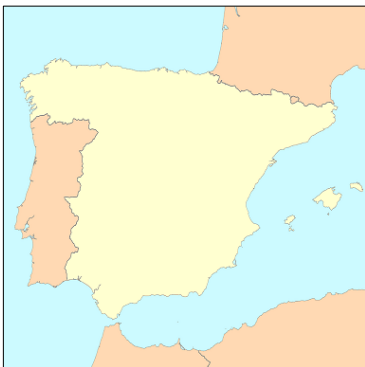


SWISS FACTOR IN SPANISH MARKET



CROSSBORDER SHOPPERS FROM SPANISH MARKET

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



Spain

15.500 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)

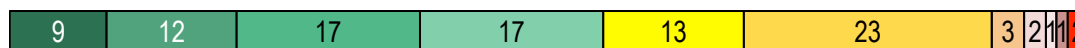


SWISS PROMOTERS IN SPAIN

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



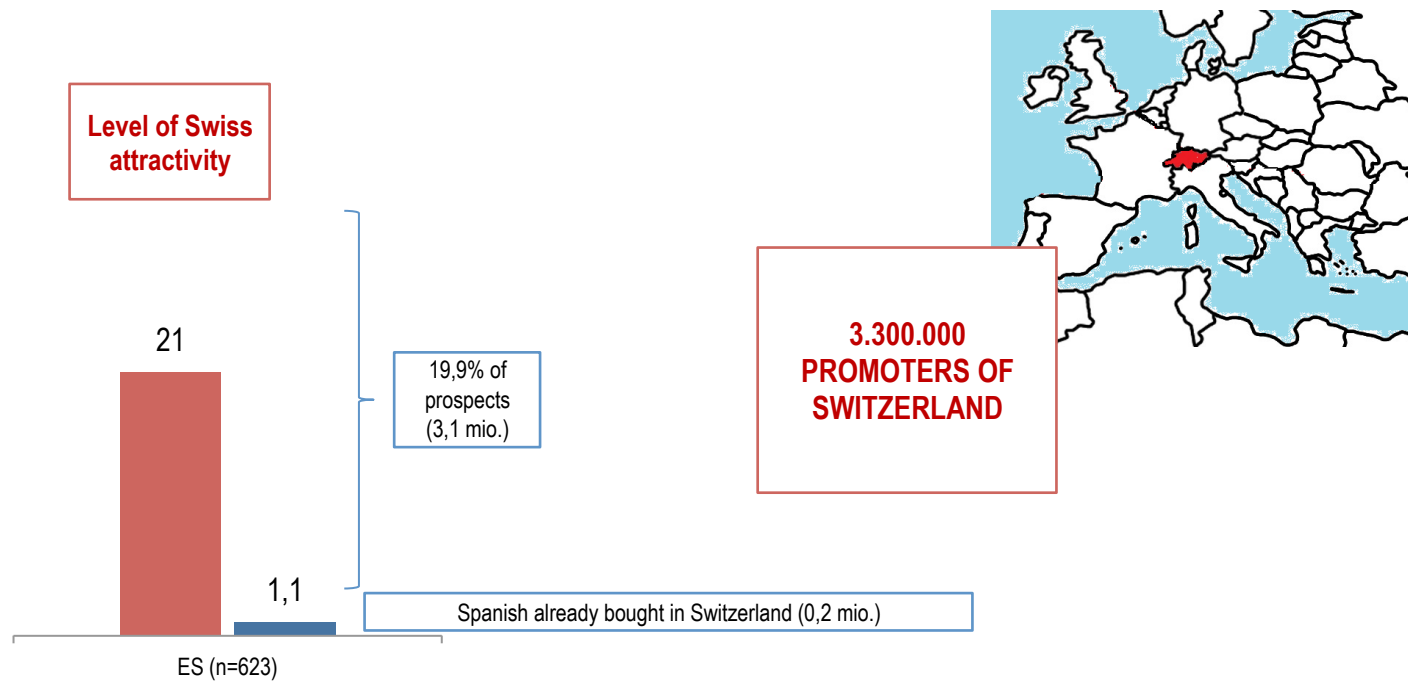
**PROMOTERS OF
SWITZERLAND 21%**

**REJECTORS OF
SWITZERLAND 45%**



SWISS ECOMMERCE EXPORT POTENTIAL IN SPAIN

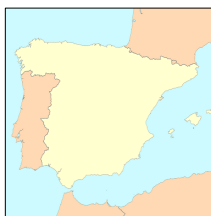
Base: users aged 16-65 shopping online Spain, n=623; %





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 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%

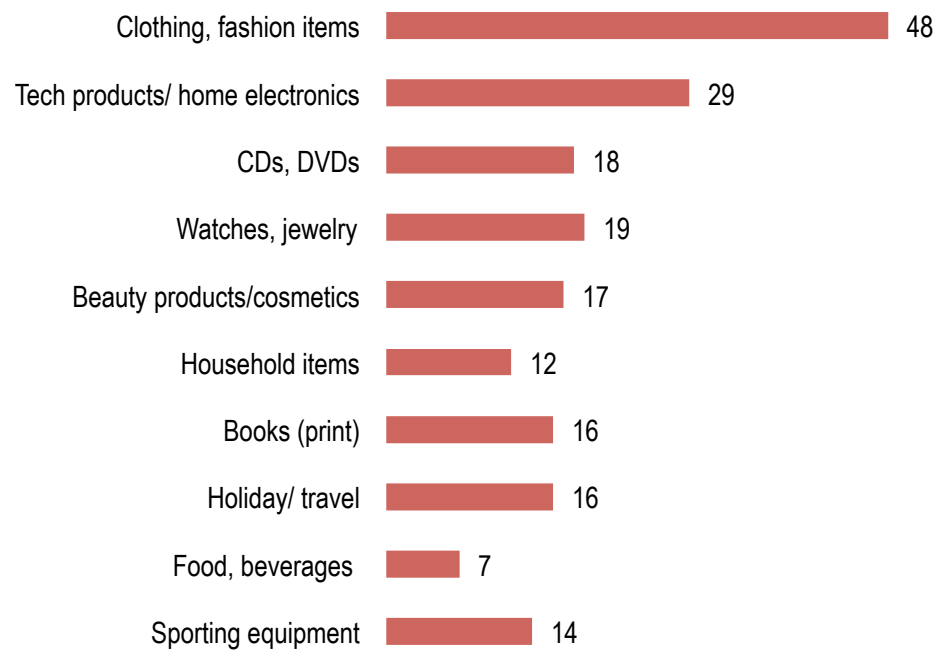
LEVEL OF INTERACTIVITY (0-100):

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?

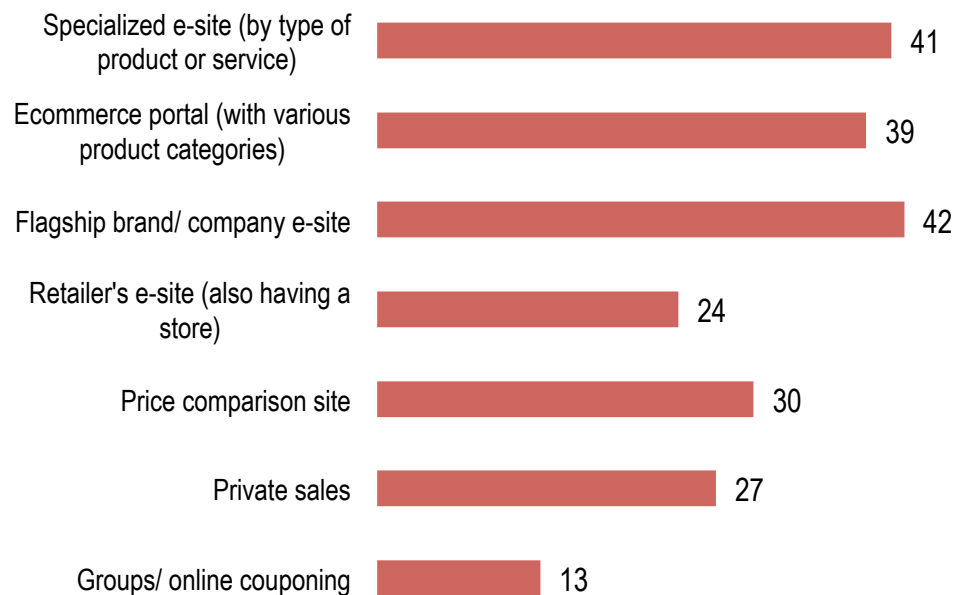




PROMOTERS OF SWITZERLAND: FAVOURITE ECOMMERCE CHANNELS

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?

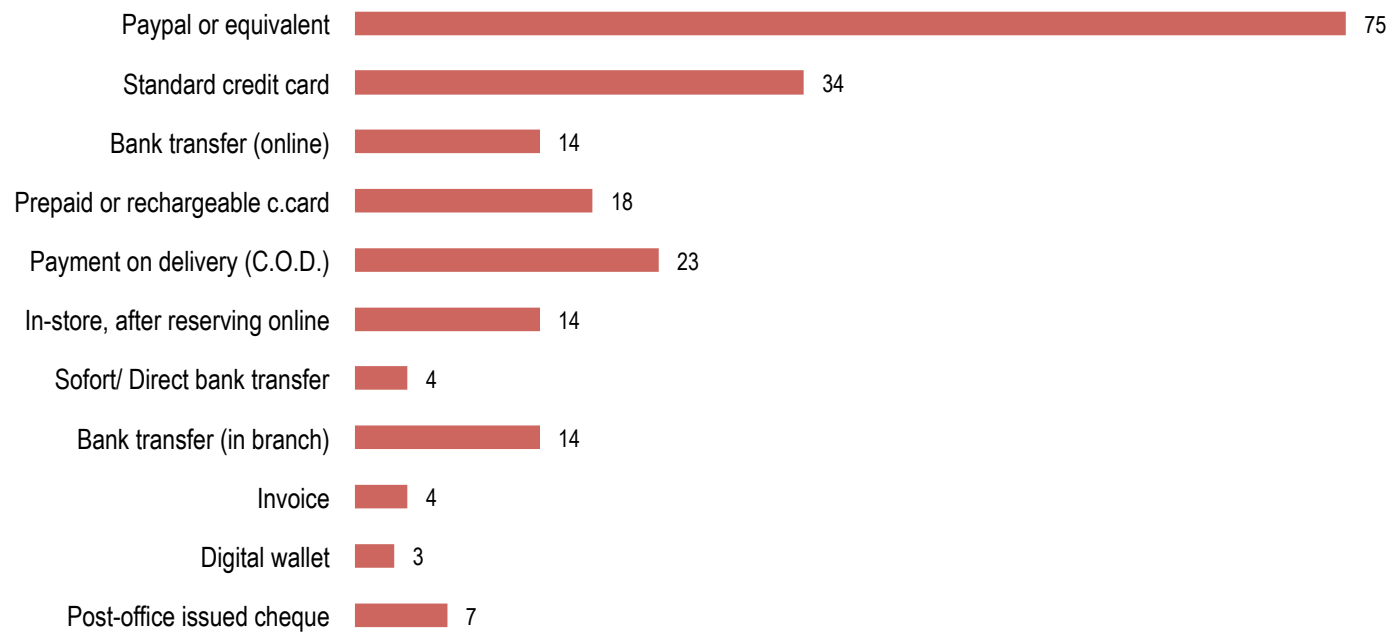




PROMOTERS OF SWITZERLAND: PREFERRED METHODS OF PAYMENT

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?

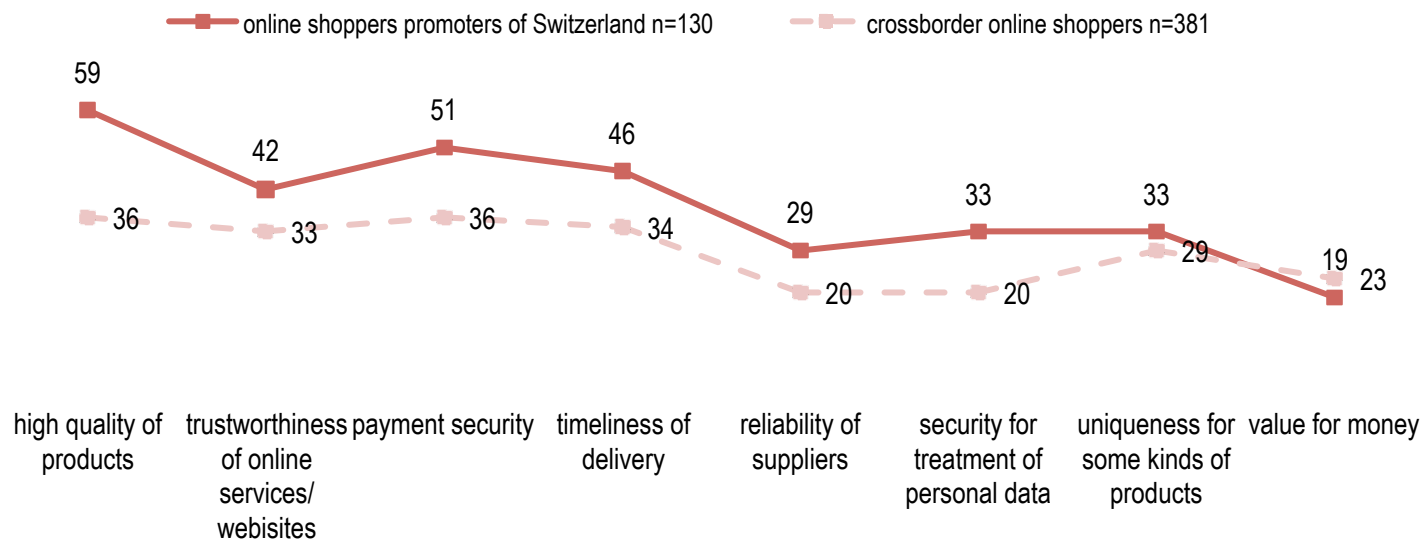




PROMOTERS OF SWITZERLAND: SWISS IMAGE FOR ECOMMERCE

Base: users aged 16-65 Spain; %

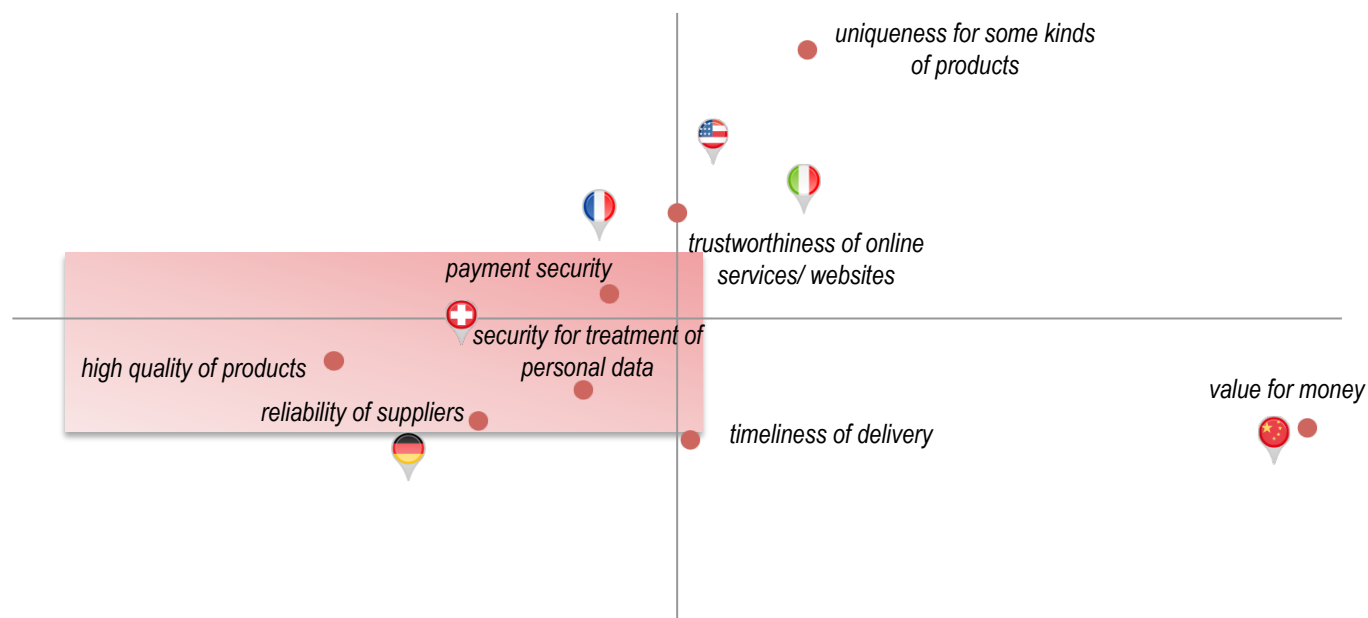
Thinking about online shopping, which of the following characteristics would you associate to Switzerland?





MAP OF ECOMMERCE COUNTRY IMAGE

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







CROSSBORDER SHOPPERS FROM 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)

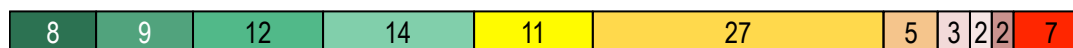


SWISS PROMOTERS IN UK

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



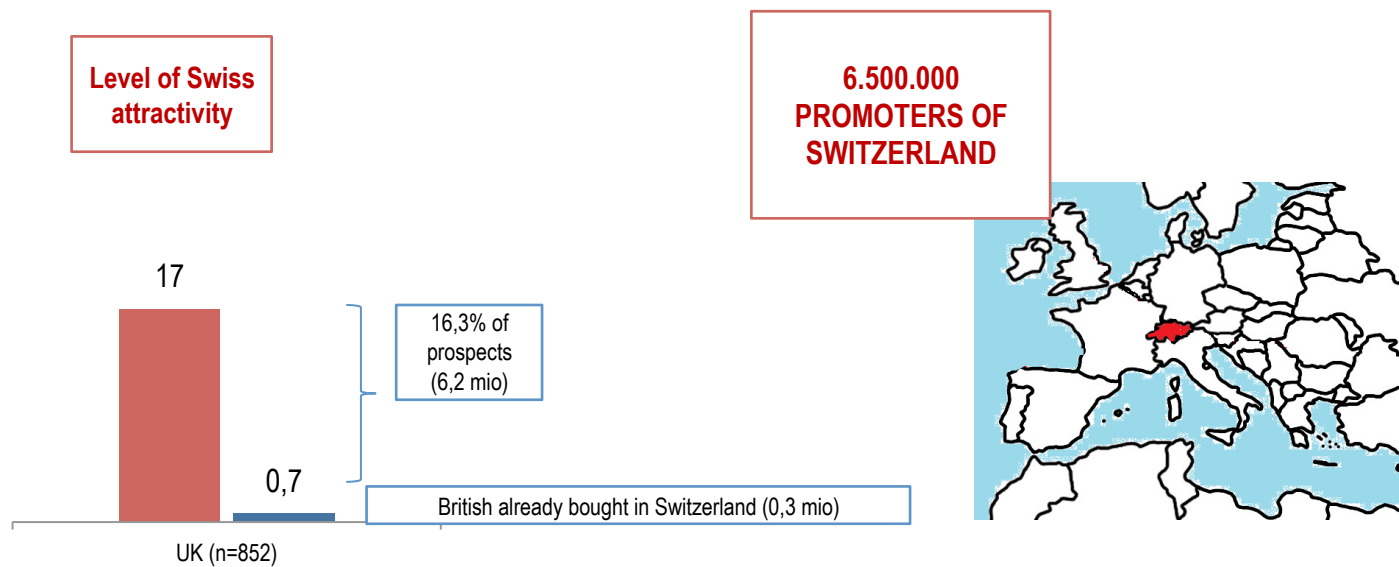
**PROMOTERS OF
SWITZERLAND 17%**

**REJECTORS OF
SWITZERLAND 57%**



SWISS ECOMMERCE EXPORT POTENTIAL IN UK

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





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%

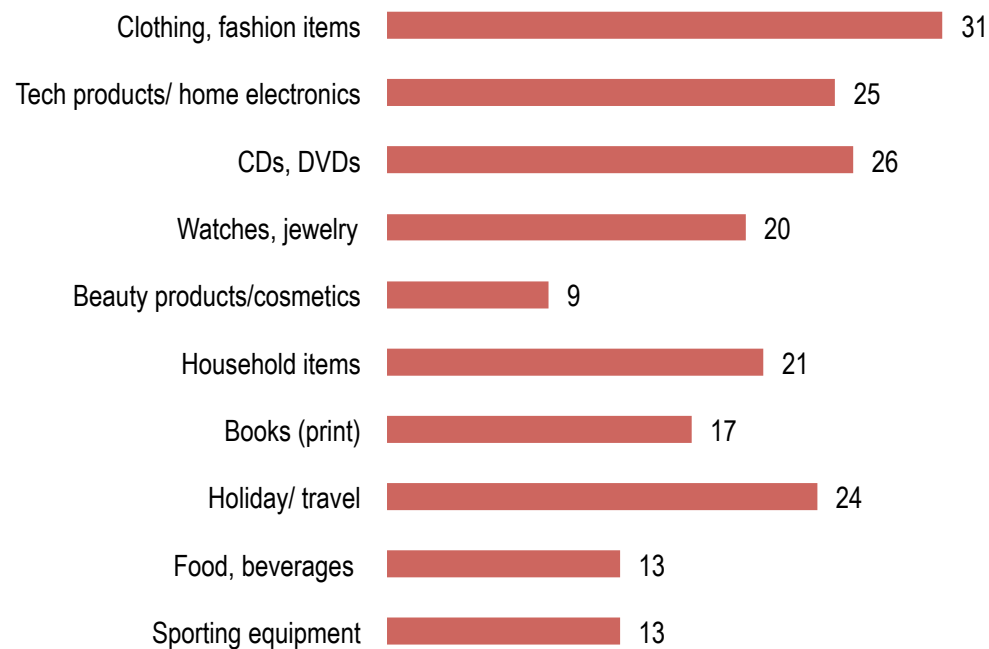
LEVEL OF INTERACTIVITY (0-100):

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; %





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?

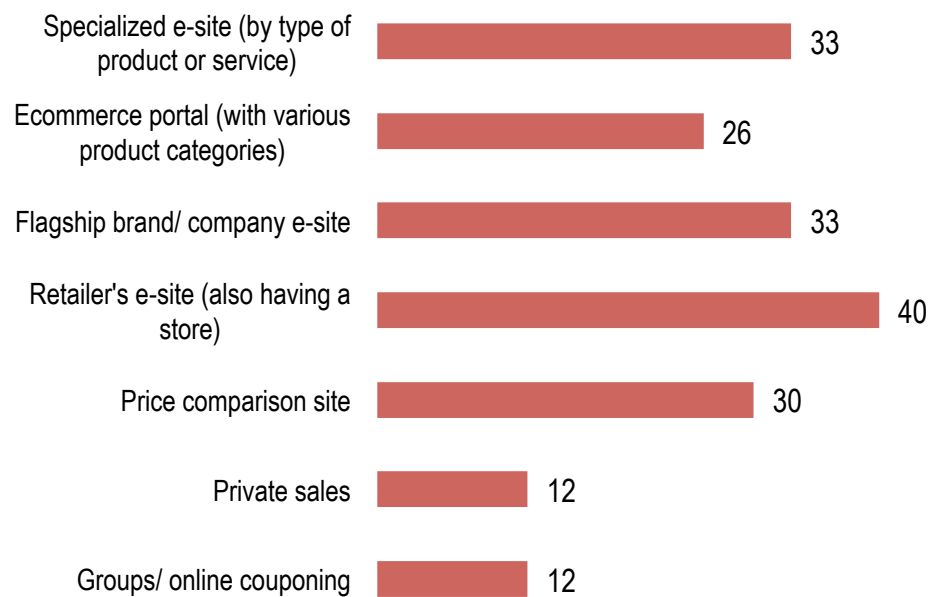




PROMOTERS OF SWITZERLAND: FAVOURITE ECOMMERCE CHANNELS

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?

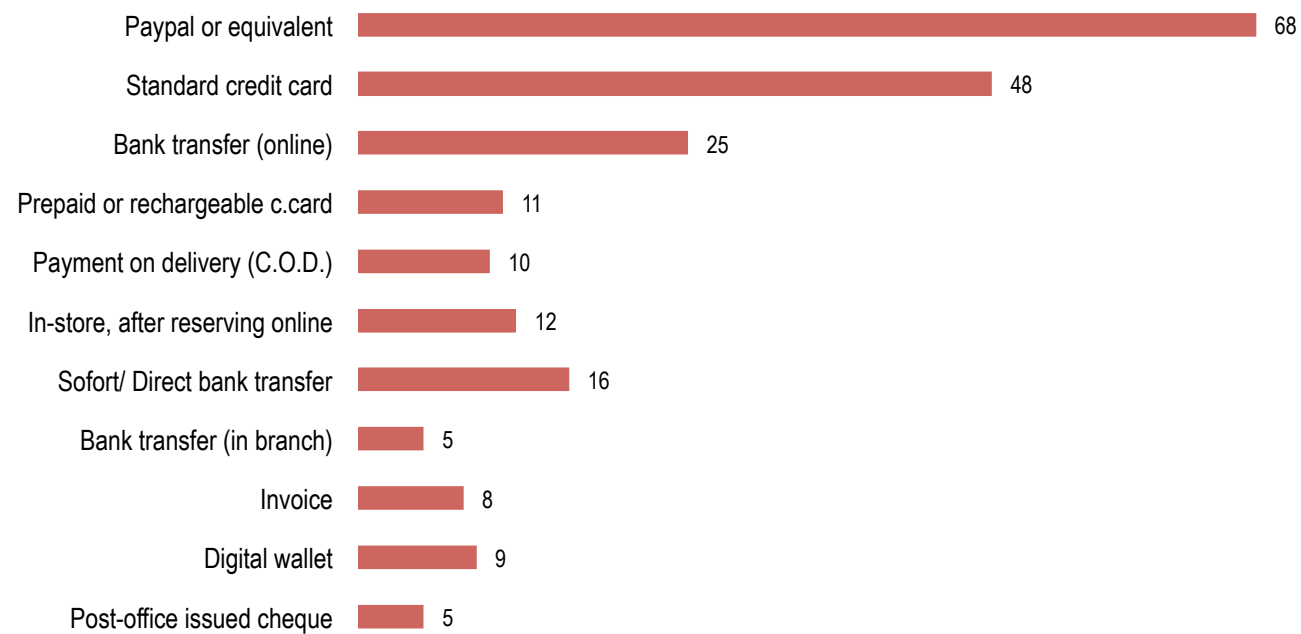




PROMOTERS OF SWITZERLAND: PREFERRED METHODS OF PAYMENT

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?

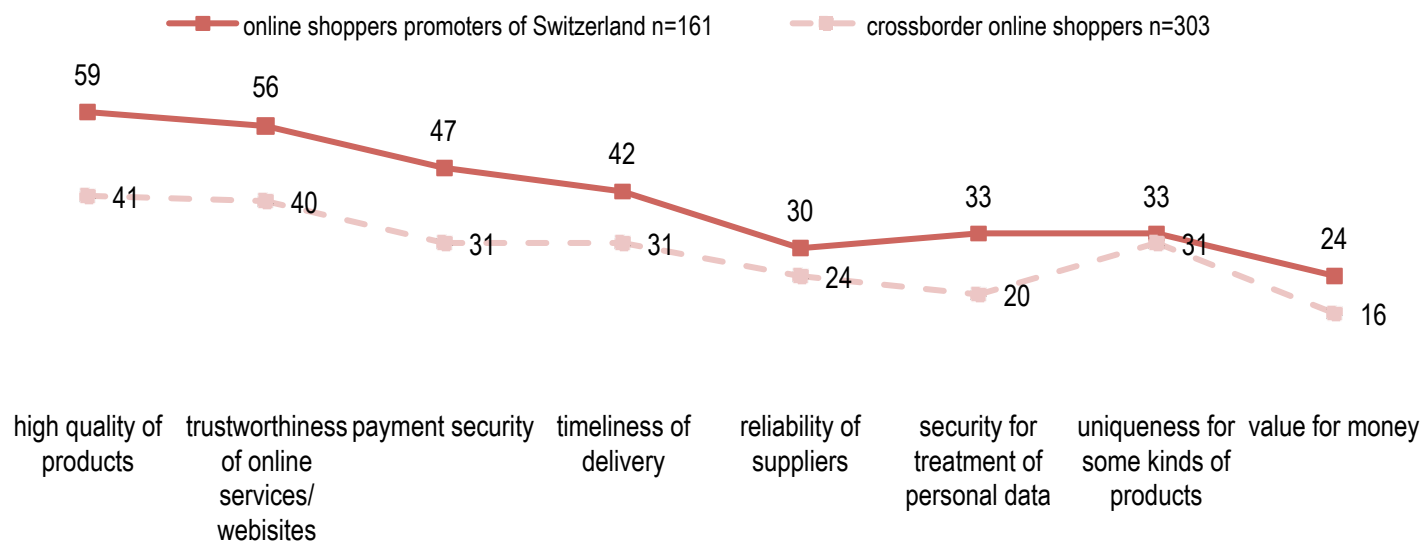




PROMOTERS OF SWITZERLAND: SWISS IMAGE FOR ECOMMERCE

Base: users aged 16-65 UK; %

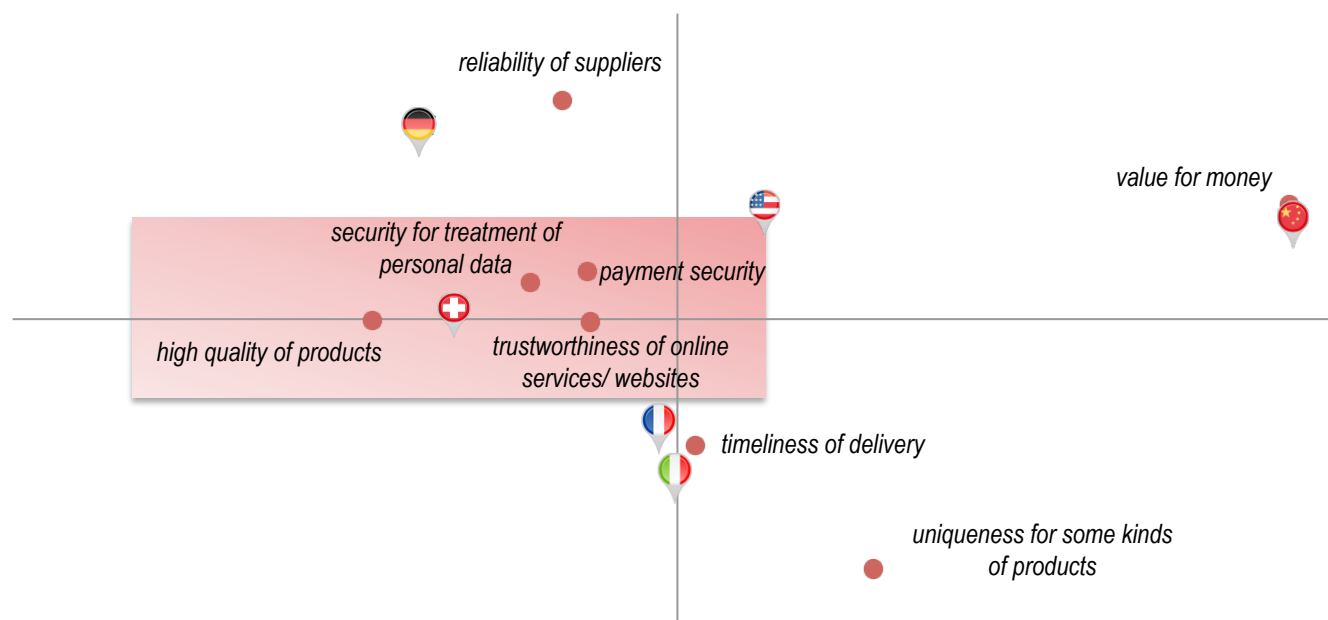
Thinking about online shopping, which of the following characteristics would you associate to Switzerland?

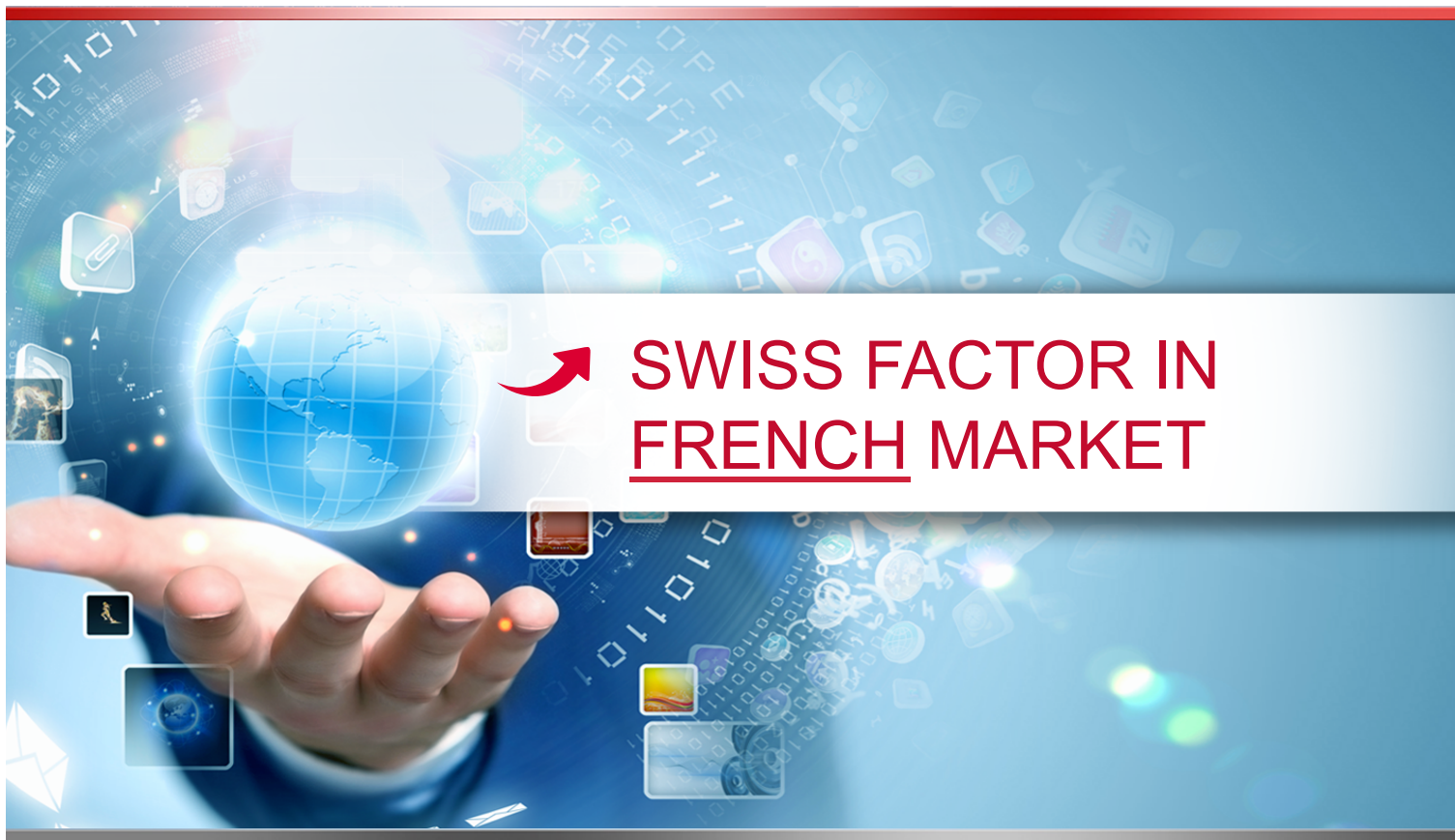




MAP OF ECOMMERCE COUNTRY IMAGE

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

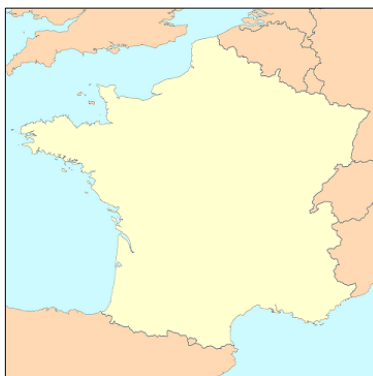






CROSSBORDER SHOPPERS FROM FRENCH MARKET

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)

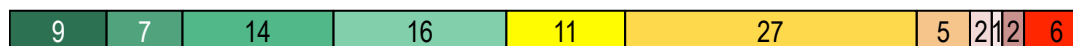


SWISS PROMOTERS IN FRANCE

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



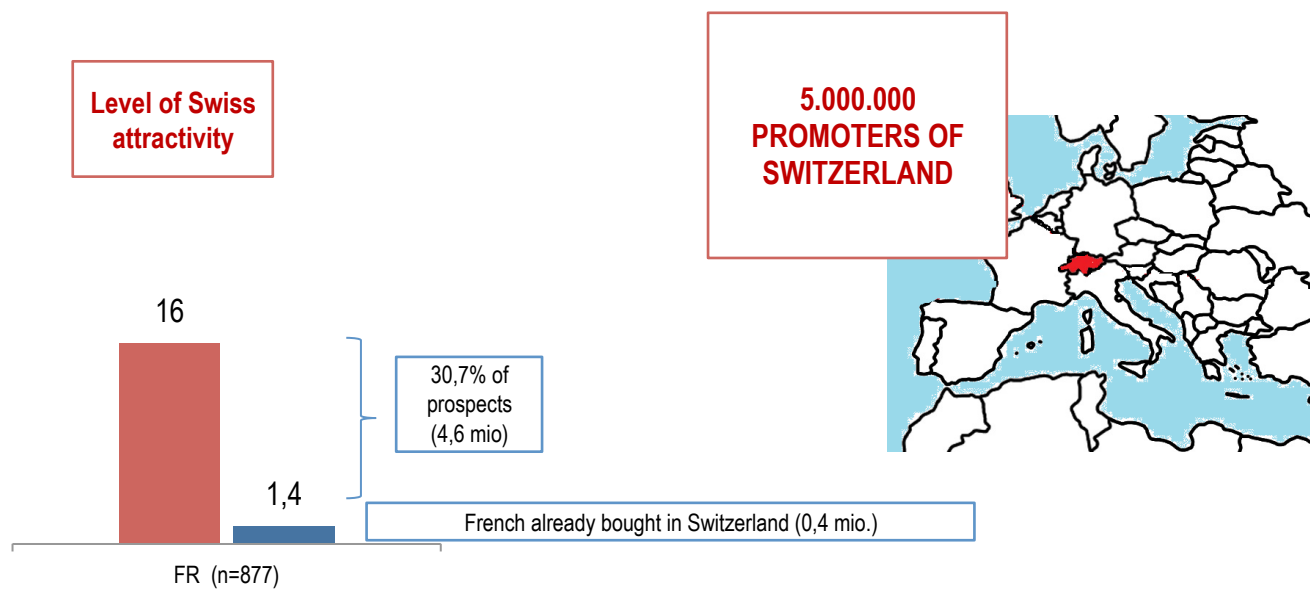
**PROMOTERS OF
SWITZERLAND 16%**

**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; %

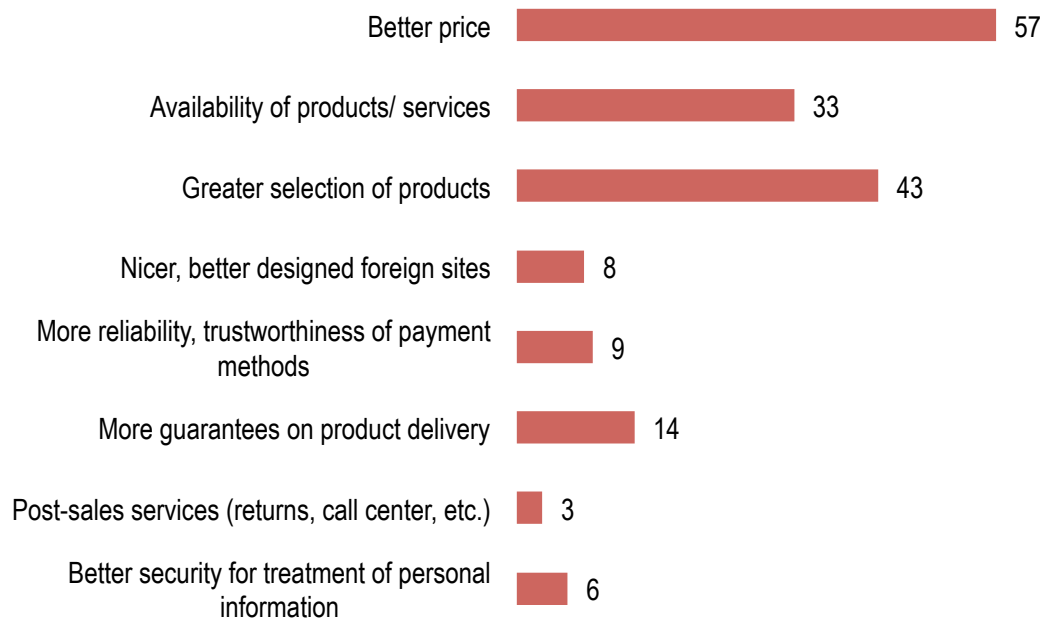




PROMOTERS OF SWITZERLAND: REASONS FOR BUYING ABROAD

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?

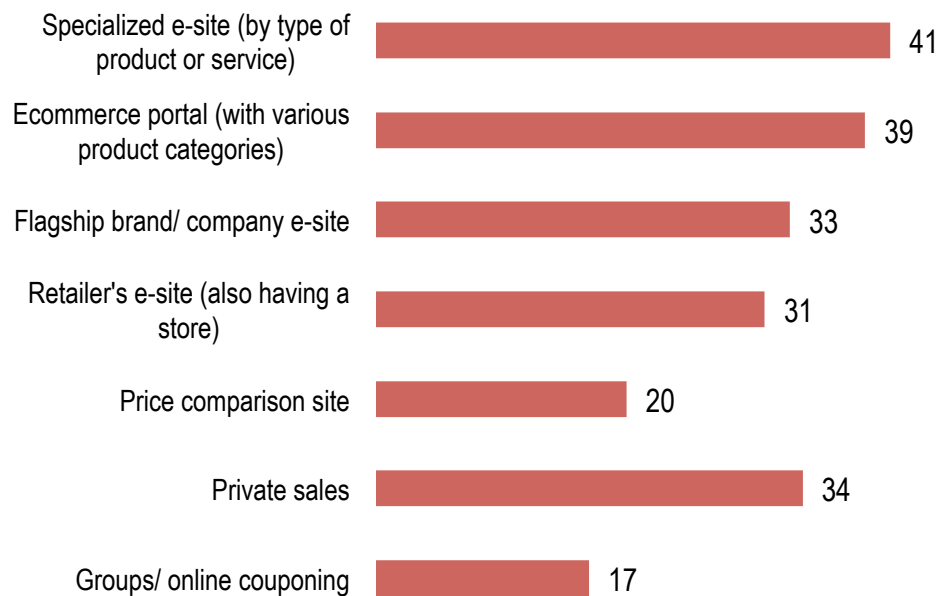




PROMOTERS OF SWITZERLAND: FAVOURITE ECOMMERCE CHANNELS

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?

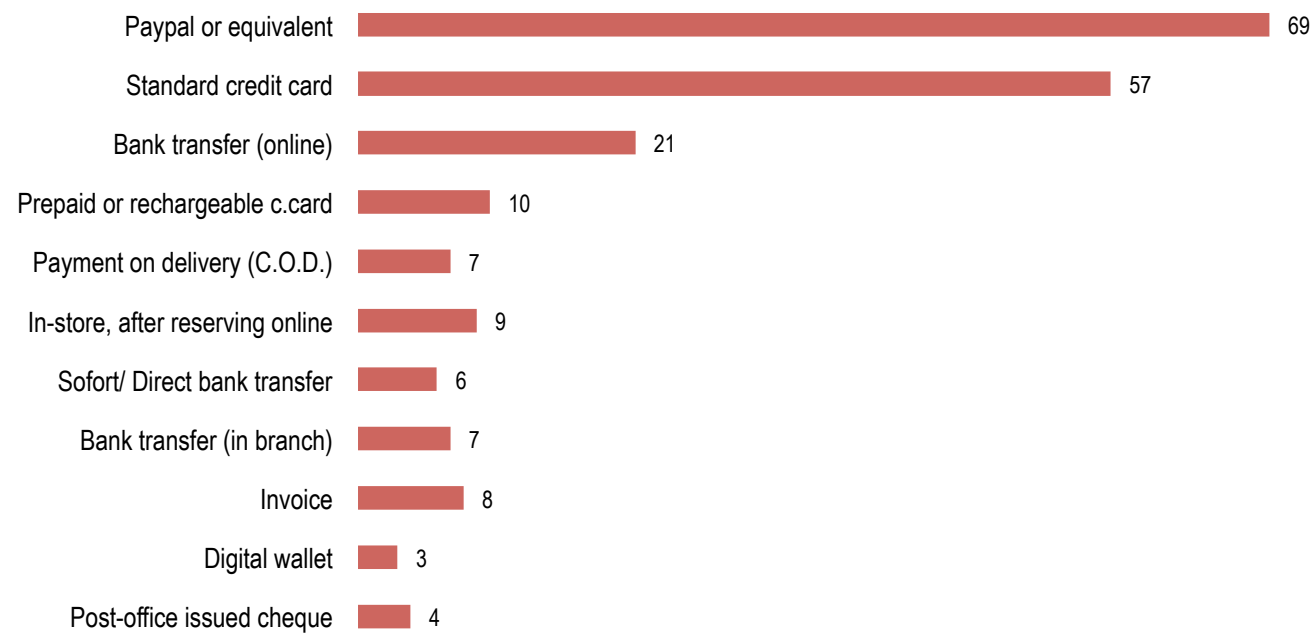




PROMOTERS OF SWITZERLAND: PREFERRED METHODS OF PAYMENT

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?

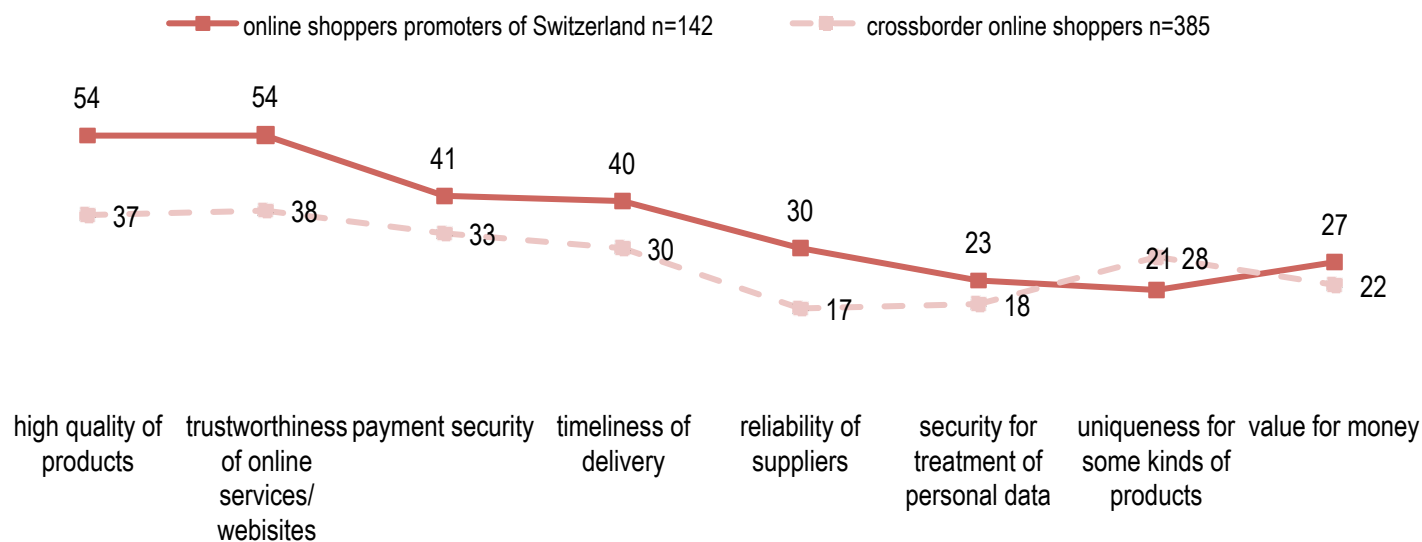




PROMOTERS OF SWITZERLAND: SWISS IMAGE FOR ECOMMERCE

Base: users aged 16-65 France; %

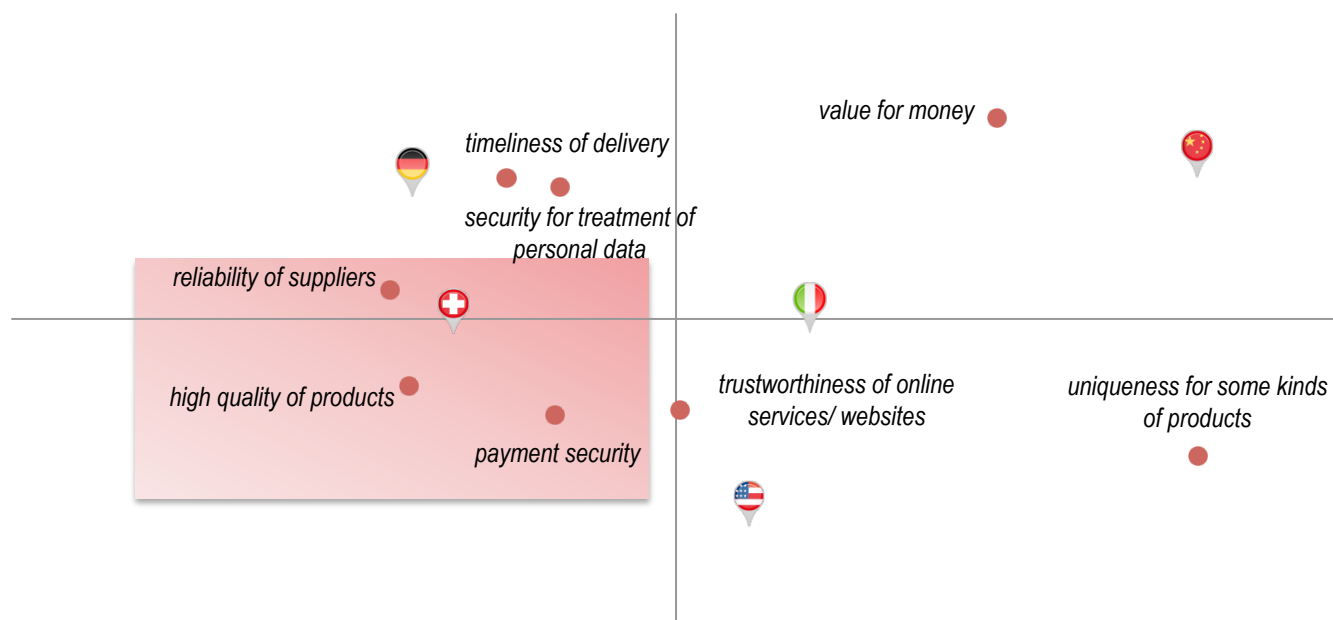
Thinking about online shopping, which of the following characteristics would you associate to Switzerland?





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 CHINESE MARKET



CROSSBORDER SHOPPERS FROM 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%)

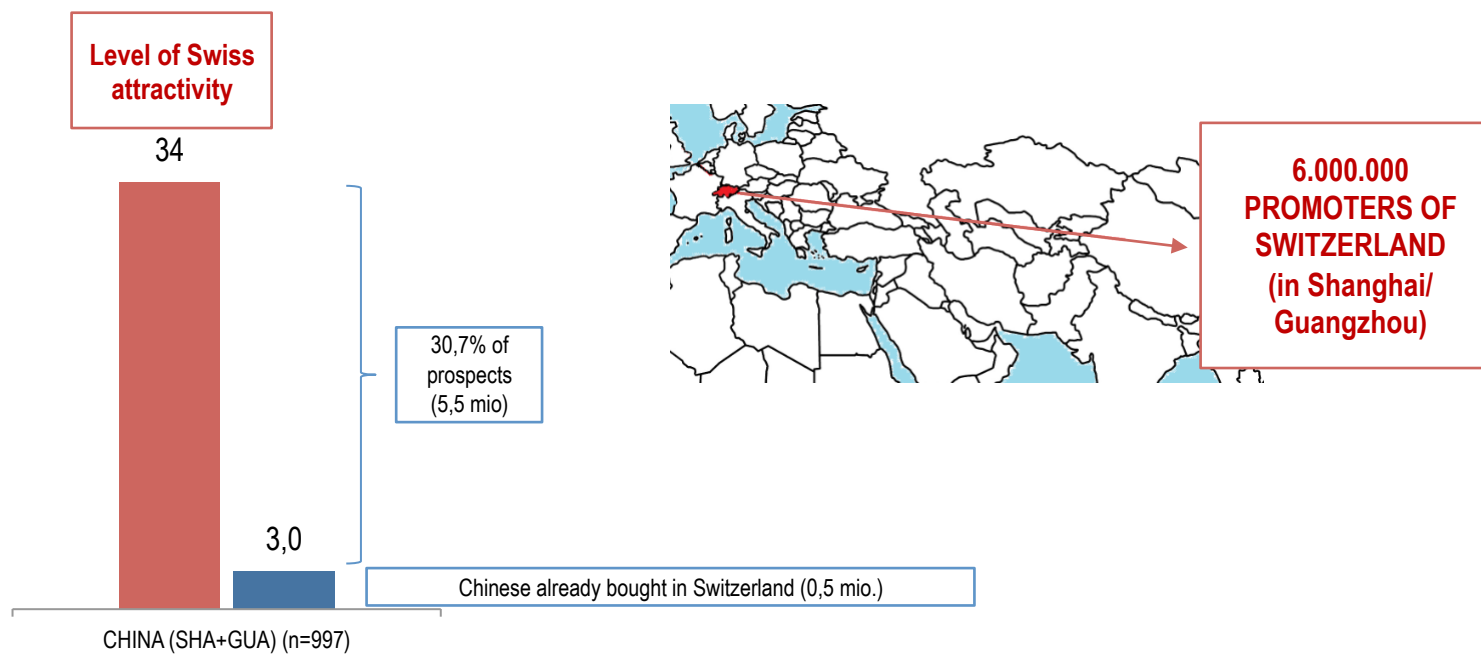
REJECTORS OF SWITZERLAND 29%

(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

**6.200.000
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%

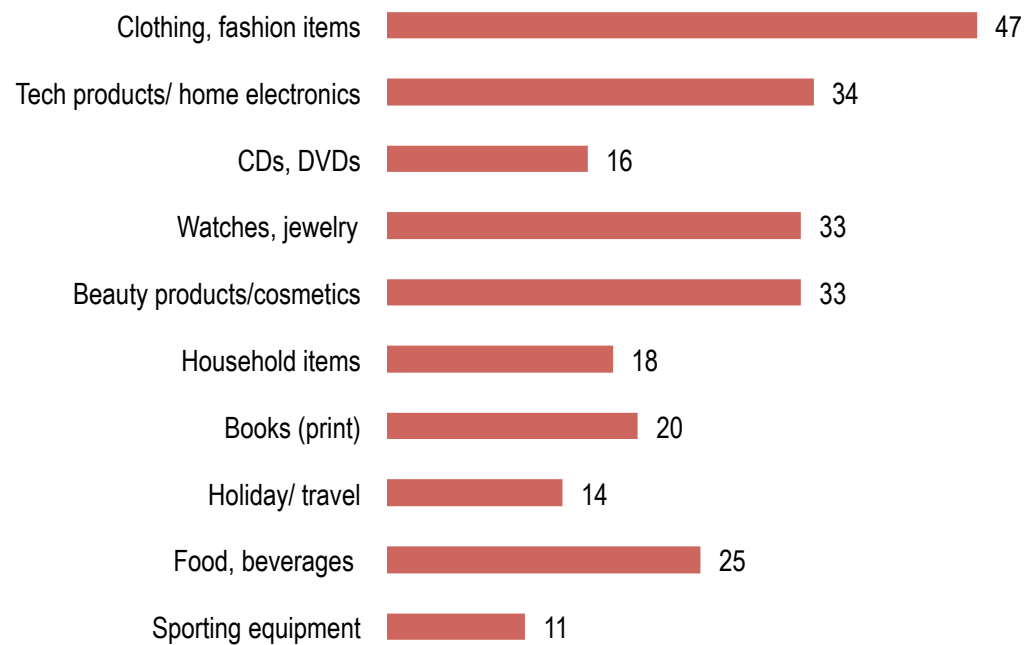
LEVEL OF INTERACTIVITY (0-100):

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; %





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?

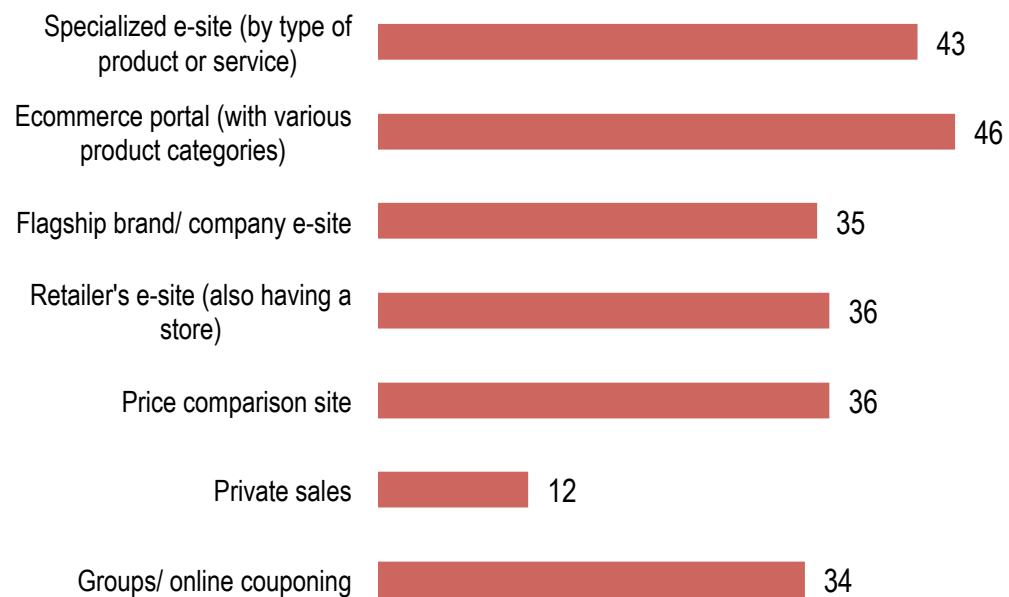




PROMOTERS OF SWITZERLAND: FAVOURITE ECOMMERCE CHANNELS

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?

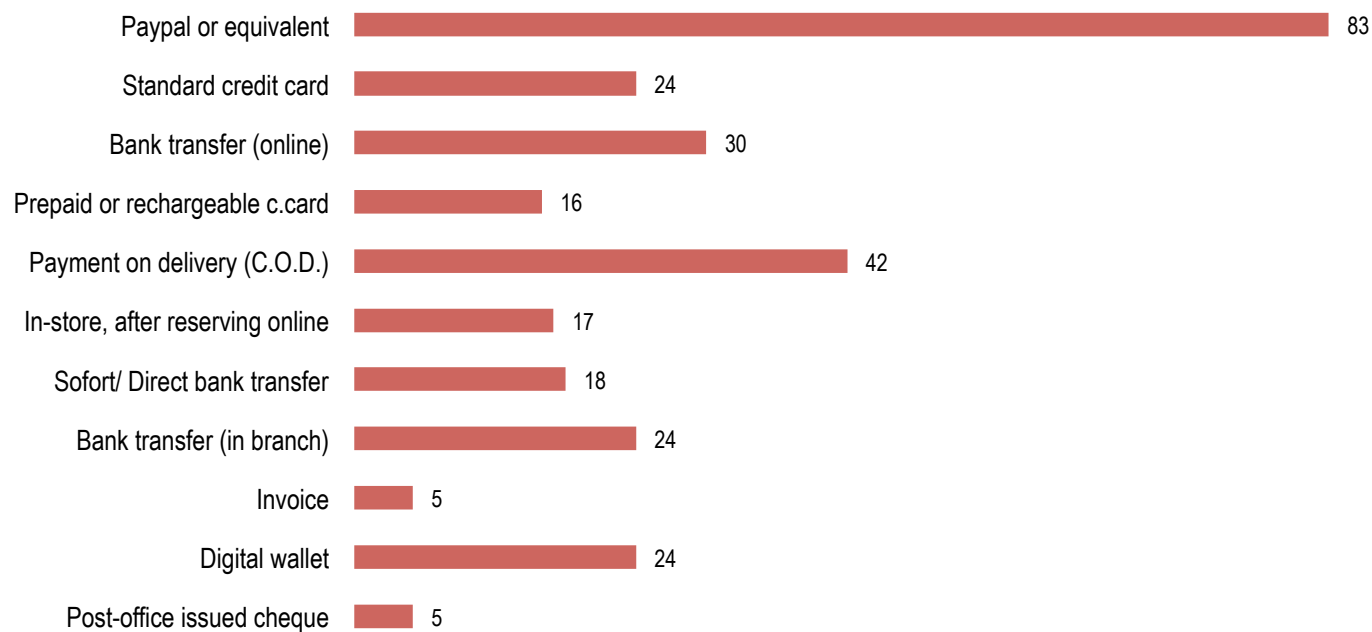




PROMOTERS OF SWITZERLAND: PREFERRED METHODS OF PAYMENT

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?

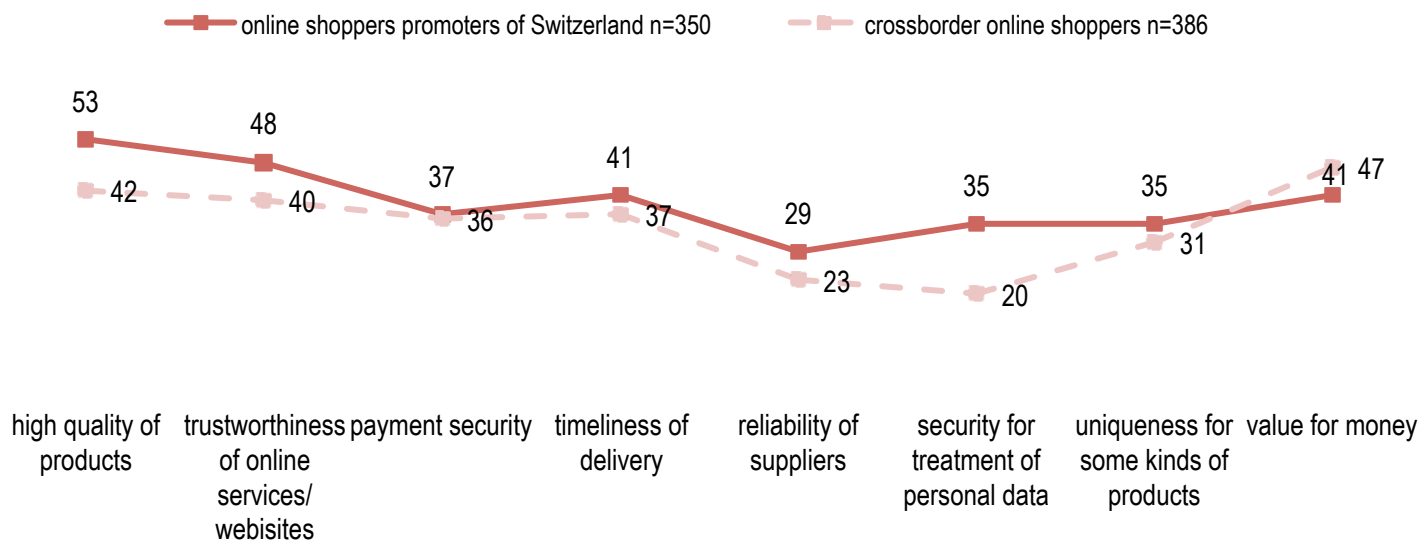




PROMOTERS OF SWITZERLAND: SWISS IMAGE FOR ECOMMERCE

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

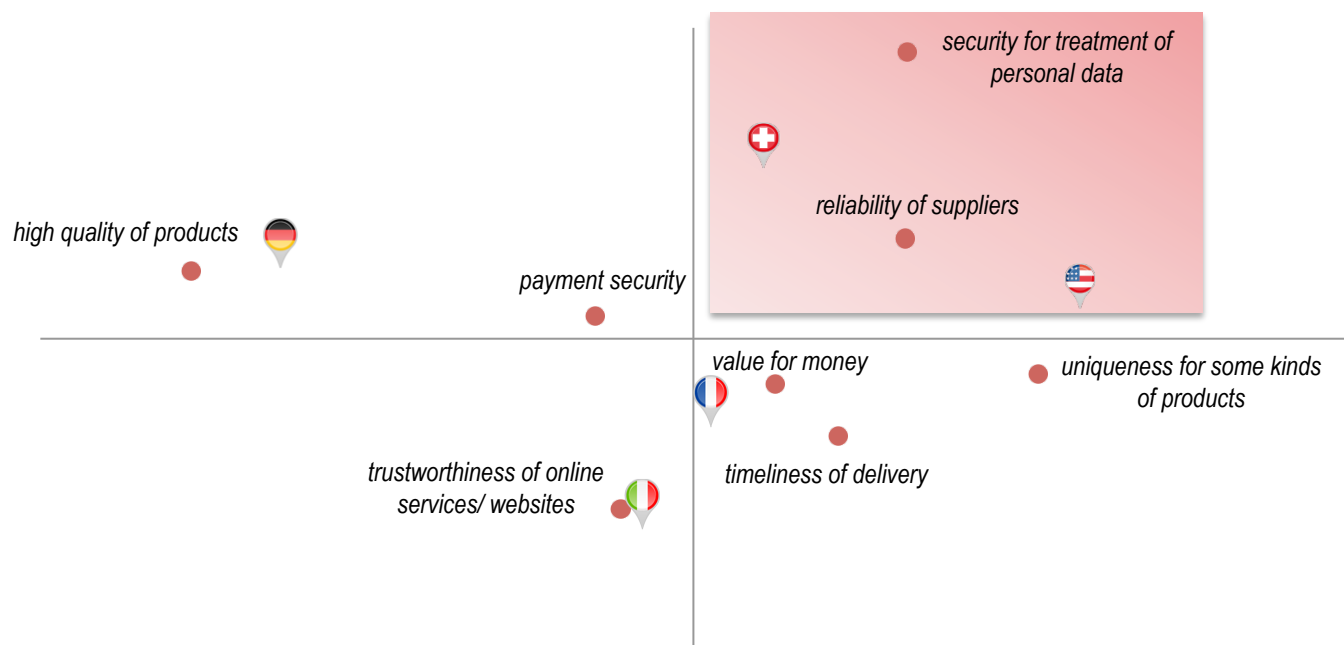
Thinking about online shopping, which of the following characteristics would you associate to Switzerland?





MAP OF ECOMMERCE COUNTRY IMAGE

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

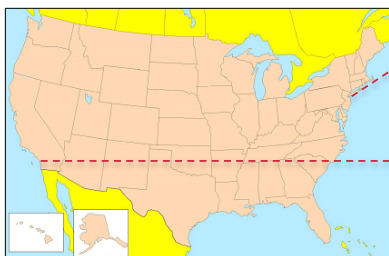






CROSSBORDER SHOPPERS FROM US MARKET

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)	

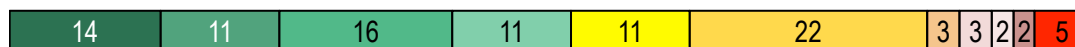


SWISS PROMOTERS IN US

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



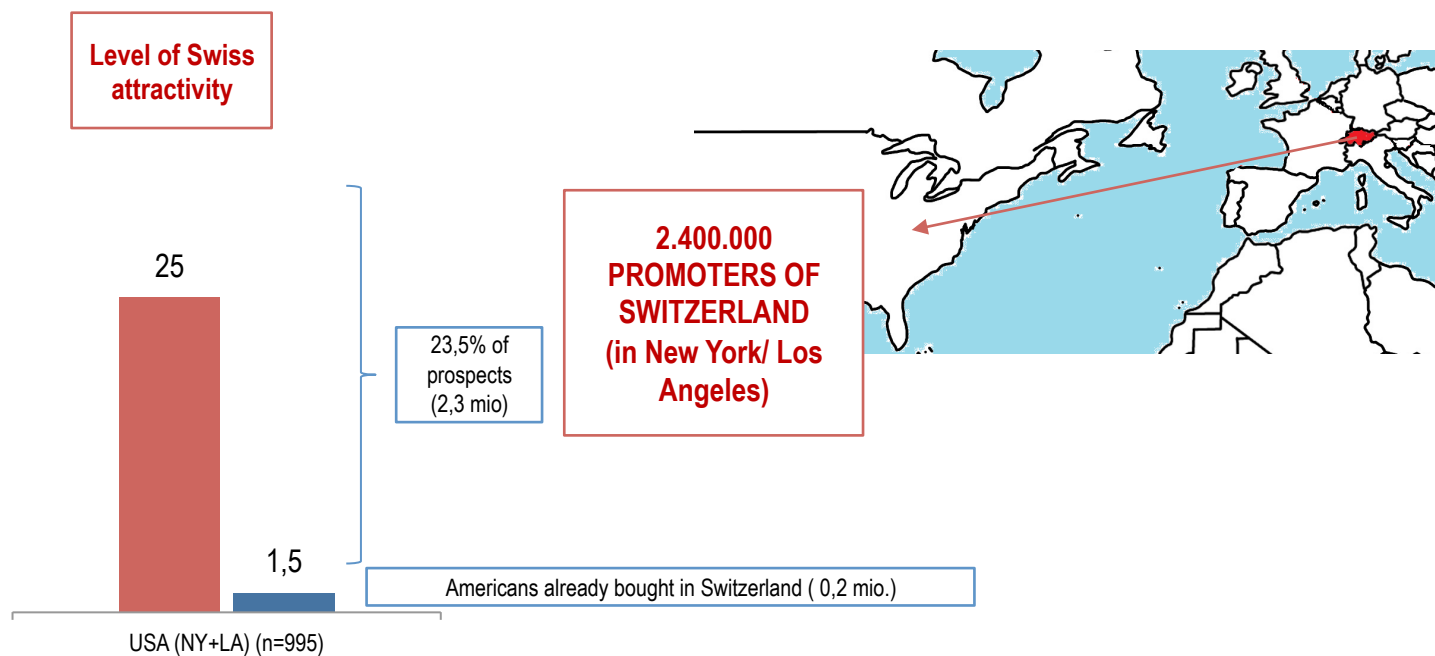
**PROMOTERS OF
SWITZERLAND 25%**

**REJECTORS OF
SWITZERLAND 48%**



SWISS ECOMMERCE EXPORT POTENTIAL IN US

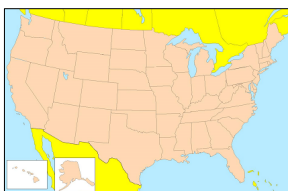
Base: users aged 16-65 shopping online New York + Los Angeles, n=995; %





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)	38%
▪ ONLINE INFO-COMMERCE	92	▪ QR CODE users (last 4 weeks)	65%
▪ 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-governement, etc.	...	• SHOPPERS via smartphone	66%

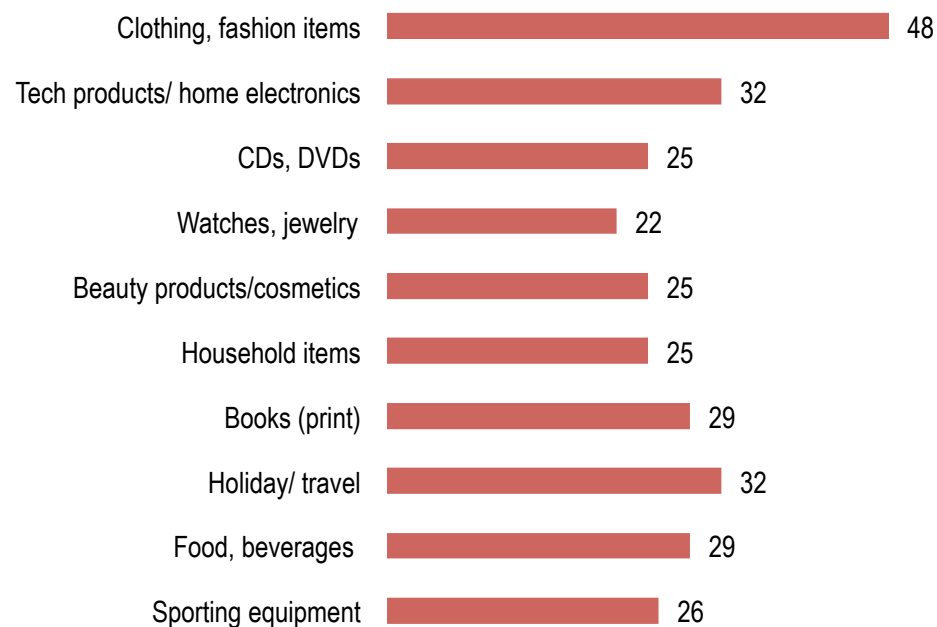
LEVEL OF INTERACTIVITY (0-100):

64



PROMOTERS OF SWITZERLAND: TOP 10 PRODUCT CATEGORIES PURCHASED ABROAD

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





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?

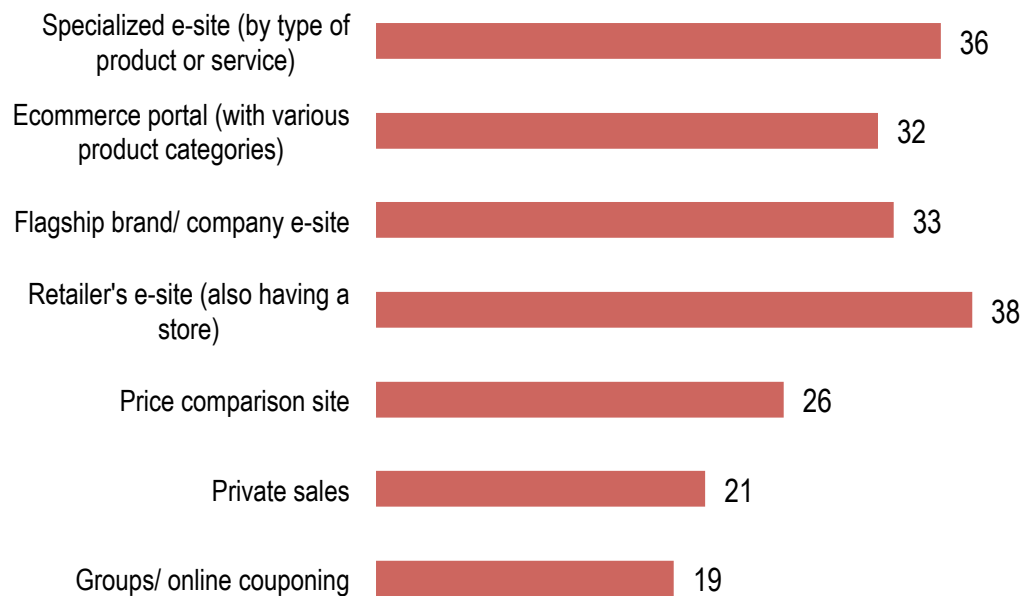




PROMOTERS OF SWITZERLAND: FAVOURITE ECOMMERCE CHANNELS

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?

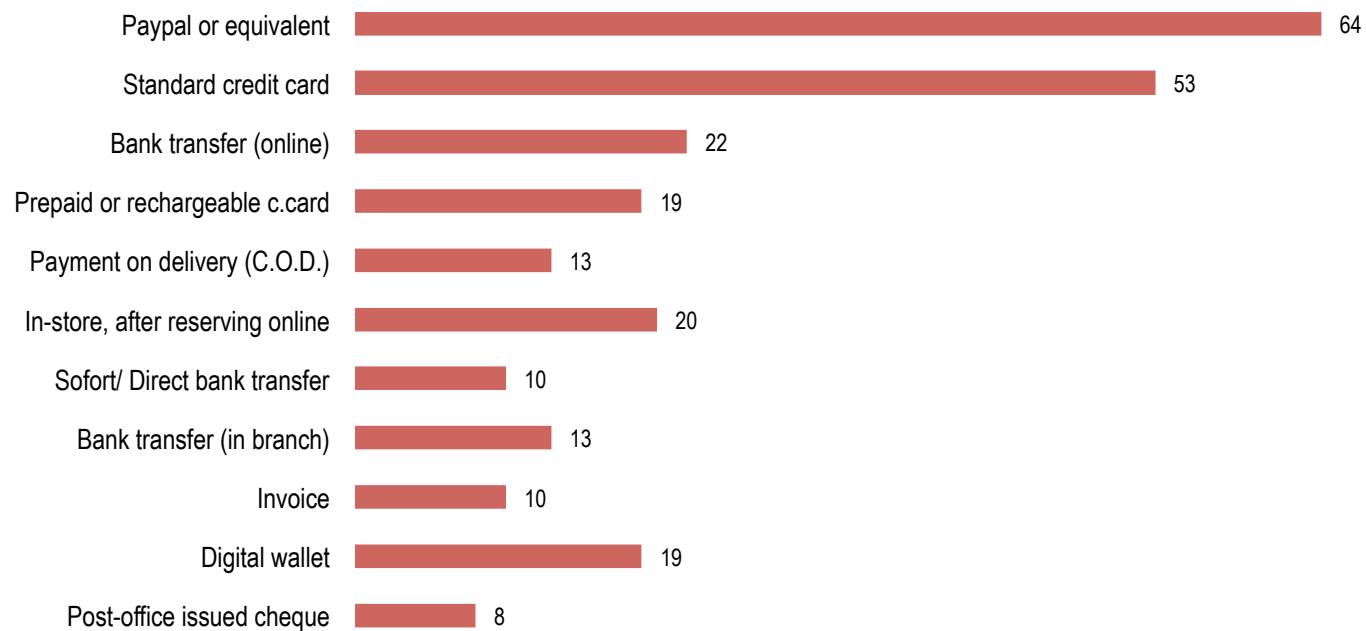




PROMOTERS OF SWITZERLAND: PREFERRED METHODS OF PAYMENT

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?

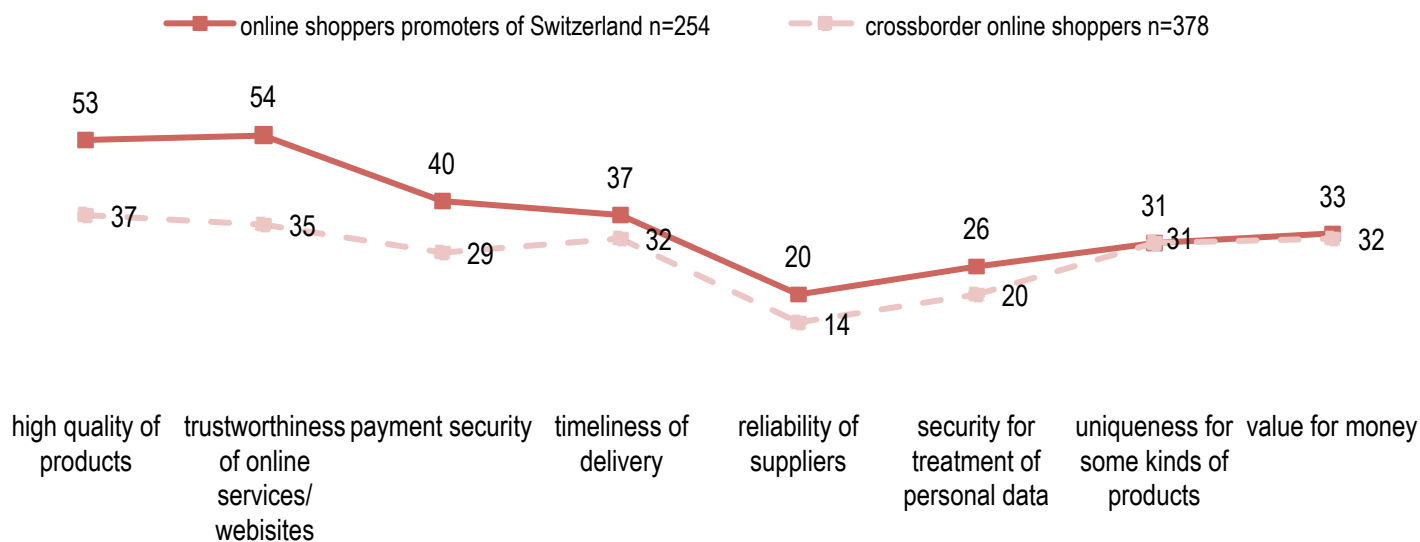




PROMOTERS OF SWITZERLAND: SWISS IMAGE FOR ECOMMERCE

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

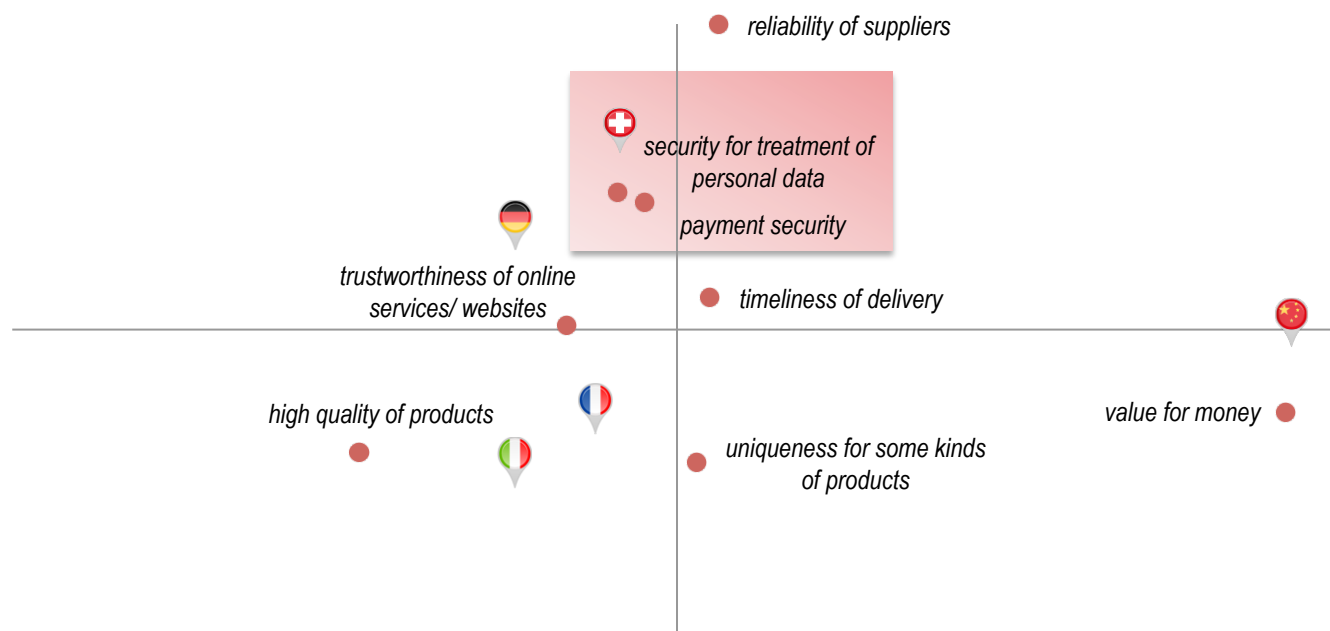
Thinking about online shopping, which of the following characteristics would you associate to Switzerland?





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



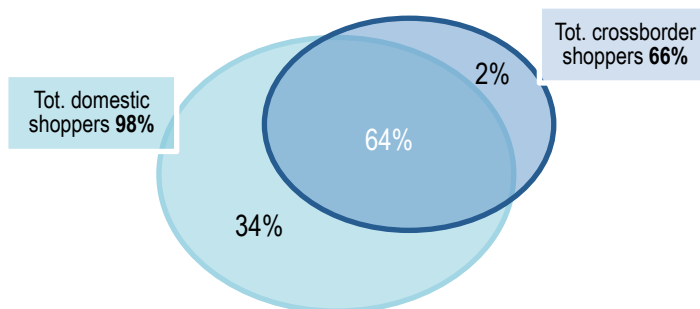


CROSSBORDER SHOPPERS FROM SWITZERLAND



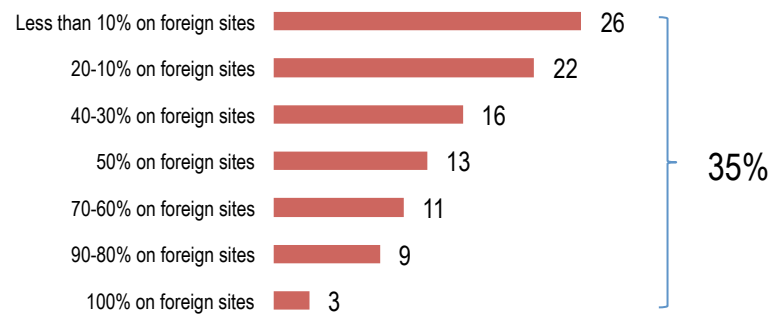
CROSS BORDER ONLINE SHOPPING – FOCUS ON SWITZERLAND

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



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

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











	2015	2014
Online shoppers,	90%	90%
Tot. cross border online shoppers	66%	62%
Only cross border shoppers	2%	4%
Cross border share of tot. online expenditure	35%	23%

CROSS BORDER ONLINE SHOPPING - INTERNATIONAL VIEW

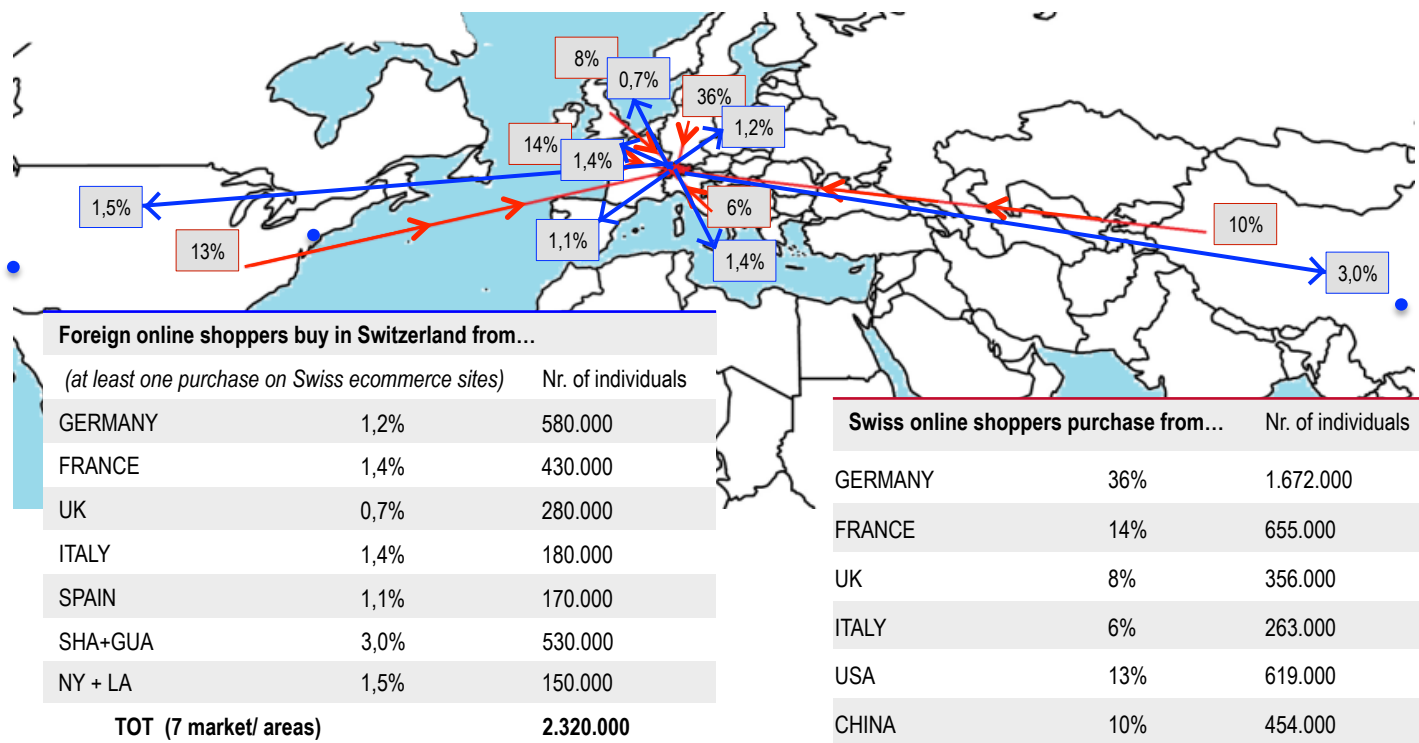
Base: users aged 16-65, %

(...) 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 +GUA	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.,

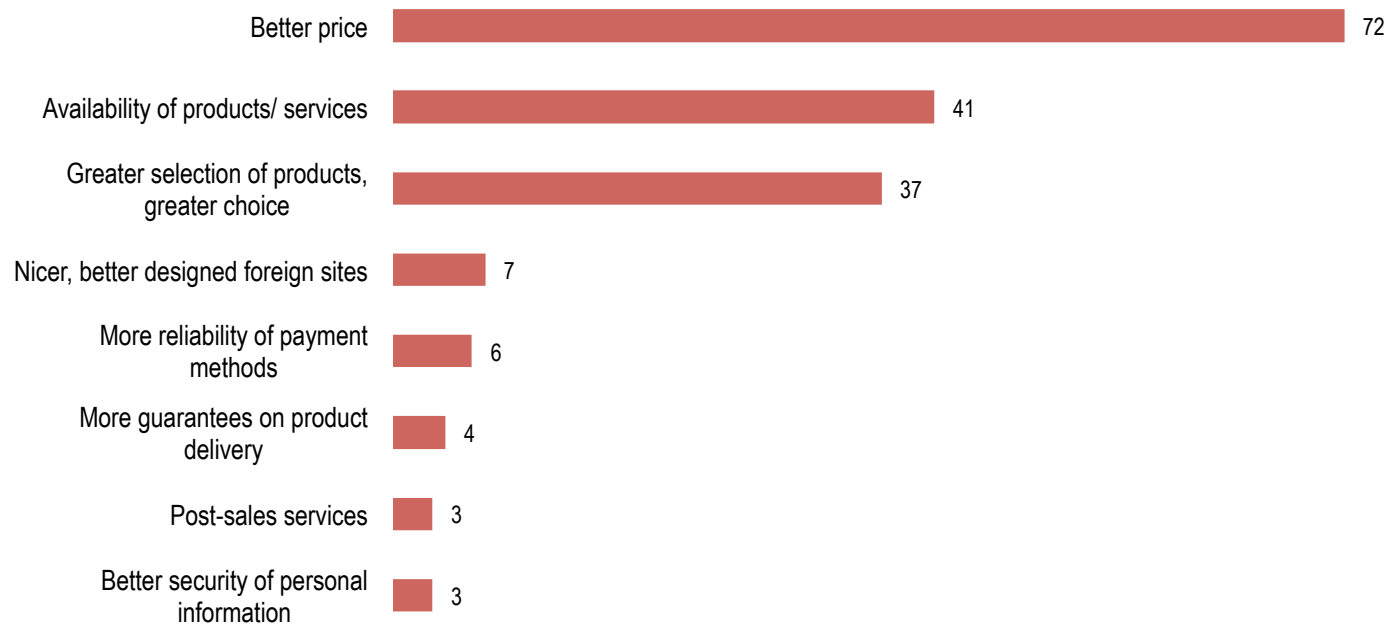




CROSS BORDER ECOMMERCE: GENERAL REASONS FOR BUYING ON FOREIGN SITES

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?





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			Méditerranée	13		
				Wales	5						
				Scotland	8						
				Northern Ireland	3						

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