Universität Zürich[UZH]

Thesis

To obtain the degree of

Master of Advanced Studies in Real Estate

E-commerce in the retail sector

The impact of e-commerce on retail in Swiss High Streets from the retailers` perspective

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List of Abbreviations

BFS	Bundesamt für Statistik
CBRE	Coldwell Banker Richard Ellis
CS	Credit Suisse
FSO	The Swiss Federal Statistical Office
GfK	Gesellschaft für Konsumforschung
HDE	Handelsverband Deutschland
VSK	Verband Schweizerischer Konsumvereine
USA	United States of America
ZHAW	Zürcher Hochschule für angewandte Wissenschaften

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Executive summary

The e-commerce is a current phenomenon which has a disruptive impact on retail sector. New technologies have influenced not only the way we work and live but also the way we shop. Online retail provides an easier alternative to traditional physical stores. It constitutes over 9 % of total retail market worldwide. The contemporary online platforms such as Amazon and Zalando are reporting an impressive revenue growth. The retailers have to adjust their business models and strategies in order to follow the on-going transformation.

This thesis focuses on the impact of e-commerce on retail in the centres of the most populated cities in the German-speaking part of Switzerland. Additionally, it analyses the differences across groups of retailers regarding to the perceived pressure of online shopping.

The survey methodology has been applied. A sample consists of retailers from various groups who target different consumers and sell goods in low to high price segment.

First of all, the impact of e-commerce on retailers in Switzerland has been confirmed. However, its extent differs across the groups. Retailers from jewellery sector who position their goods in high price segment and target senior consumers perceive smaller pressure of e-commerce than retailers selling cloths in low to middle price segment to younger consumers.

Additionally, the results show that depending on the extent of the perceived pressure, retailers generally have other preferences and business models. Retailers who declared low impact of e-commerce focused on high quality services and synergy effects with gastronomy, whereas the ones who declared the high impact offer theme events, experience-oriented shopping and training programmes as well as they show interest in a network of pick-up points. The low impact group is less interested in technologies than high and middle impact group. However, in the field of real estate there are similarities across the groups on issues such as a new store´s location, synergy effects with different uses and needed surface.

1. Introduction

Traditional retail is in decline and big companies are reporting loses. The phenomenon worries both the retailers and property owners. Retail faces new challenges in the world of e-commerce, where online shopping and huge marketplaces like Amazon, Zalando and Alibaba are defining the new shopping landscape. Thanks to the ability of providing small vendors with cheap ways of reaching a great amount of consumers online marketplaces are becoming important players in the sector. More and more people use mobile devices, which make the way people live, work and shop unrecognisable to previous standard. Since sales in traditional brick-and-portage stores decline, retailers need to develop new shop formats and online channels. This has also an influence on the development of logistics which now ought to be closer to customers in order to shorten the delivery time. The whole transformation requires new business models and digitalisation strategies.

1.1. Definitions

omni-channel firms - firms that sell products through a variety of channels and integrate their physical stores with their websites and mobile platforms[1]

bricks-and-clicks - companies that have a network of physical stores as their primary retail channel, but also introduced online offerings[2]

virtual merchants- single-channel e-commerce firms that generate almost all of their revenue from online sales [3]

big data - refers to the deluge of digital data that is being produced by the billions of people using the Internet around the world, as well as an explosion of data from the Internet of Things[4]

B2B service provider - sells business services to other firms [5]

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[1] Laudon, 2017, p. 744

[2] Laundon, 2018, p 621

[3] Laudon, 2018, p. 612

[4] Laudon, 2018, p. 628

[5] Laundon, 2018, p. 84

B2C service provider - sells business services to customers [6]

Low impact group - in this thesis the term is used for retailers who declare a low impact of e-commerce

Middle impact group - in this thesis the term is used for retailers who declare a middle impact of e-commerce

High impact group - in this thesis the term is used for retailers who declare a high impact of e-commerce

1.2. Research objective

This paper addresses an ongoing transformation in the retail sector in the German-speaking part of Switzerland. The goal of this research it to confirm or verify the following hypothesis: The development of e-commerce in Switzerland has a big impact on traditional retail from the retailers perspective.

The expected impact of e-commerce include the following aspects:

- retailers` preferences
- new store formats
- logistic and storage surface
- customer experience strategies
- new business models and digitalisation strategies

1.3. Research limitations

The paper has limitations in the aspect of retailers perspective, geography, timeline and methodology. The limitations also define the guidelines for future research.

Retailers` perspective

Firstly, this research investigates the perspective of retailers. This group was selected due to the fact that it usually has long-term business plans which give significant information on the future of the sector. Analysing the impact of e-commerce from the consumer`s point of view would give an additional value.

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[6] Laundon, 2018, p. 84

Geography

The research looks at the business strategies of retailers in the German-speaking part of Switzerland. Verifying possible differences in the French and Italian-speaking regions would give a better understanding as an influence of eventual cultural biases would be investigated.

Timeline

The research was conducted during spring and summer time. It would be interesting to investigate retailers strategies over a longer period of time as it could show additionally huge dynamics of the e-commerce.

Questionnaire

The thesis is based on date, acquired via a questionnaire. Gaining a greater depth of date would be possible through structured interviews with retail managers provided they are not subject to business confidentiality.

1.4. Research design

Data was acquired through a survey among the retailers in the German-speaking part of Switzerland.

Data analysis techniques involved simple comparisons and graphic representations. Next, a T-test was run in order to verify if there were statistically significant differences among the groups which declared low versus middle or high impact of e-commerce on their business.

2. Literature review

2.1. E-commerce

E-commerce is the activity of selling and buying of products and services on the Internet. It is strongly dependent on the use of IT and functions such as electronic money transfer, supply chain management, online marketing, inventory management systems, electronic data interchange and automated data collection systems. Its history started over 40 years ago and still continues to grow. One can distinguish the following milestones in the history of e-commerce: the development of the Electronic Date Interchange (EDI) in 1960-80, the development of the Internet in 1982-1990, creation of the first web server and browser in 1991, the development of security protocol - the Secure Sockey Layer (SSL) in 1994 and the development of online payment services like PayPal in 1998. It is important to note that initially, the use of IT in companies started as automation of manual tasks. Finance, inventory, order processing, invoicing, and payroll were among the first functions. Next step was to use IT to support company-wide business processes with focus on improving cost- efficiency. Then IT use has focused on enabling business growth and improving competitive position in the organisations' marketplace.

Nowadays, companies are shifting the focus of IT from cost savings into revenue generation, into development of new products and services, which also involve new innovative business models and improve the value created to the customer (Colin & Hiekanen. Korhonen, 2015, p. 50-56).

Online retailing constitutes today about 9% of the whole retail market worldwide and is growing quicker than offline market. Figure 1 illustrates the growth of the online retail revenue worldwide, excl. services such as travel, job-hunting. It is expected to increase to 892 billion by 2022, almost doubling since 2017 (Laudon, 2018, p. 597-609).

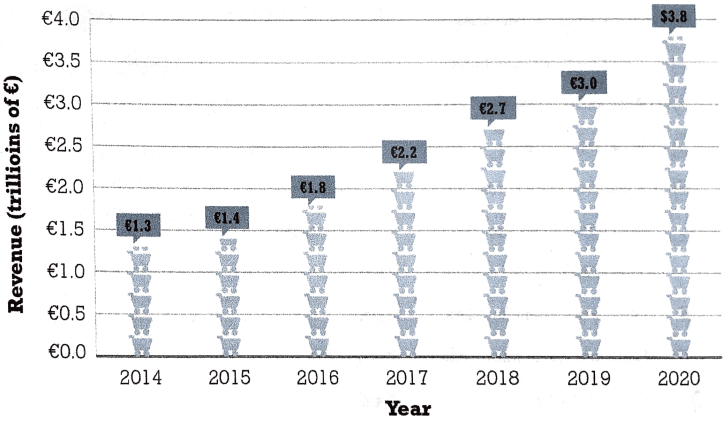


Figure 1: The growth of online retail worldwide (Laudon, 2018, p. 597)

The biggest player in e-commerce worldwide is Amazon. The Seattle based company is has been one of the most well-known virtual merchant around the globe. Initially, it was started by Jeff Bezon as an online bookstore. Then, Amazon started selling physical and digital products, which it purchased and then resold to consumers. It has been acting as an online shopping mall when it comes to collecting fees from other producers for managing its online services. Amazon´s success was possible to three factors: the lowest price, the best selection and convenience. Presently, it is trying to win new consumers over its competitors with delivery speed. It has already invested in drone delivery, cargo jets and self driving vehicles. Additionally, it is enquiring new brands with existing stores to develop its physical presence (Berg, Knights, 2019, p.6-20). Its dominance of the market is presented in figure 2, which illustrates the growth of the main online platforms worldwide.

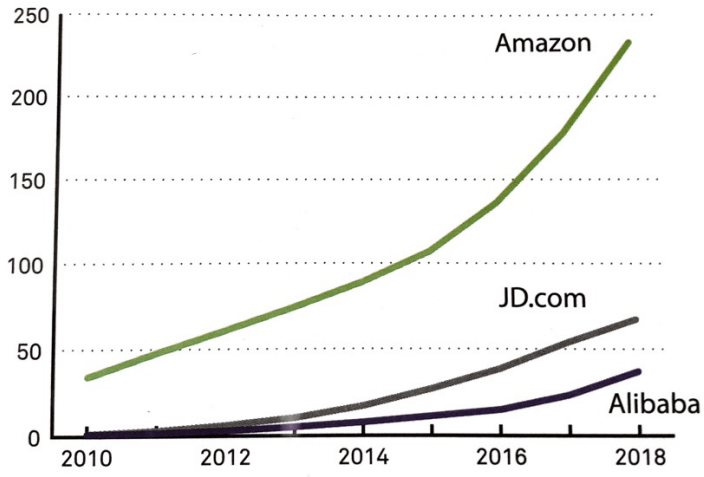


Figure 2: Revenue of Alibaba, JD, Amazon worldwide in 2010-2018 in milliard dollars (Alibaba Group 2018; amazon.com 2019, Jd 2018; in Schleicher, 2019, p. 73)

2.2. Trends

2.2.1. Megatrends

Retail is a dynamic sector and is undergoing constant changes, which are rooted in Megatrends observed in our society. The most significant trends are New Work, Neo-Ecology, Urbanisation, Mobility, Individualisation and Connectivity. Firstly, in the working environment, the New Work Trend, at times when machines are able to perform certain tasks more efficiently than human beings, indicates that the creativity at work is going to be more priced. Secondly, due to the global warming Neo-Ecology Trend is said to influence our decisions from personal purchases to social and corporate values. This will largely increase the demand for sustainable and regional products (Stadt Zürich, 2017). Next, the growing Urbanisation Trend is considered to stimulate new forms of networking and shared mobility in our lives. One should not forget the Individualisation Trend which affects the system of values and consumption patterns, giving importance to the freedom of choices. Finally, the development of digitalisation is transforming consumer`s behaviour owing to the digital communication technologies, evaluation website and mobile applications, which shape the Connectivity Trend (Schleicher, 2019, p.11-14).

2.2.2. Trends in retail sector

The Megatrends are reflected in the retail trends (Schleicher,2019, p.18-23).

Instant Shopping

First of all, the Instant Shopping has widely dominated the sector. A contemporary consumer is impatient and is not willing to waste time on shopping. Consequently, it has to be possible to place an order quickly, pay without typing the credit card number and a product has to be delivered fast. To be successful, a business model must offer a convenient customer experience, which among others, include a convenient delivery such as a “flying delivery” by a drone or a currier. If the business fail to offer it, the customer, especially young people, who are brought up in mobile and digital environment, will purchase at a competitor. Surveys find that organisations with advanced digital customer experience have 7,8% higher revenue than their competitors. (Weill& Woerner, 2013, p 71-72).

Playful Stores

Another visible trend is a new format of stores, so called Playful Stores such as pop-up stores and showrooms. Nowadays, retailers sell not only products but also experience. A consumer has to be excited when entering a store. The characteristics of a pop-up are ephemeral, experiential, allowing brand oriented experiences, flexible in location and conditions. The format has been used by both new brands, trying to establish their business, and already existing brands, extending their activities. The key goals of introducing a pop-up store are increasing brand awareness, promoting collections and testing market concepts (Warnaby&Shi, 2018, p. 11-23). Contrary to a pop-up, a showroom store is larger and mostly designed to enable customers to test and get to know new products better. It has to impress its visitor either by new technology, design or services (Tripathi, 2016, p. 40-45). In general, this store serves product´s exposition to a consumer who will eventually purchase it online (Berg&Knights, 2019, p. 174)

Event-Shopping

Supplementary to an attractive design, contemporary shop formats must offer customers an additional programme, which is called an Event-Shopping. The programme might include a meeting with an expert, a workshop, a party or an additional service of pick up and return, repair or advisory. Another way of attracting more consumers are special sale days such as Black Friday. Retailers introduce new actions, when the seasons change and before special holidays. It is important to note that discounts alone are not enough to attract new customers (Schleicher, 2019, p 40).

Hybrid usage

Another significant trend is mixing retail with other uses. The time of big shopping malls is coming to the end. Retail is going to be combined with different services and various form of gastronomy as well as it will be located closer to consumers. Consequently, shops are believed to use less surface in the future and also to be located more frequently in cities (Schleicher, 2019, p 50).

Cash-fee retail

Finally, a cash-fee retail is becoming more present in customers life. The pioneer here is again Amazon with its Amazon Go function. In its stores a client is recognised by the entry and purchased products are registered by sensors and cameras. Afterwards, the money is automatically taken from client´s amazon accounts (Berg, Knights, 2019, 142-147). Presently, companies are trying to make payments easy thanks to smartwatch, fingerprints or face recognition as it improves the customer experience (Weill& Woerner, 2013, p. 75-76)

2.3. Business models and digitalisation strategies

Online retail is the fastest developing channel in commerce, it has the fastest growing consumer base and the biggest penetration across many categories of goods. Whereas in the past consumers looked online for really cheap prices, presently they require also convenience and time saving. They are willing to accept slightly higher prices in return for avoiding the inconvenience of shopping at malls (Laudon, 2018, 626). That is why new business models with digitalisation strategies help both retailers and suppliers meet the high expectations of their customers.

Framework for improving digital product and service

In order to provide a customer with a convenient experience, retail needs digital innovation strategies. Introducing such strategies require a carefully considered framework for diagnosing and improving digital product and service innovation. The framework consists of 5 elements: user experience, environment, digital evolution scanning, skills and improvisation (Nylen & Homström, 2015, p.57). The user experience shall be measured not only on its levels of usability but also on aesthetic and engagement. Whereas value proposition can be assessed on the level of funding their services and products. Digital evolution scanning involves gathering intelligence on new devices to identify opportunities for innovation across different context. Finally, implementation of every new strategy requires acquiring new skills and improvisation in a learning by doing model. In order to manage digital product and service innovation, companies must be able to continuously adapt and develop (Nylen & Homström, 2015, p. 58-67).

Multi-sided digital platforms

Users experience and organisation processes can be improved with multi-sided digital platforms as consumers can access all the services through one digital channel. Four digital multi-sided platforms such as Alibaba Group, Amazon.com, eBay and Rakuten Group affected the retail sector. They intermediate transactions between buyers and suppliers rather than handle the whole supply chain. In the platform logic, the consumers are the main assets, as the platform generally does not have any physical capital such as real estate or inventory. For consumers, the main benefits of multi-sided digital platforms are convenience and a great selection. With the platform as a mediator, consumers can access millions of suppliers. Platform-based business models are less capital intensive, easier to scale and more profitable in the long-term. Their earnings model is based on selling services to their user. If the development of the big platforms continues, it is likely that in the future consumers will be loyal to only a few digital provides, whose ecosystems will offer a broad spectrum of services (Hänninen, Smedlund& Mitronen, 2018, p. 153-163). At the same time, multi-sided digital platforms aim to engage with their users even more also in the physical realm, which poses a threat to retailers with a brick-and-mortar presence. (Berg& Knights, 2019, p. 165-176). The other way round, for small retailers such as brick-and-mortar retailers with an online presence, there is little choice but to be present on big platforms (Hänninen, Smedlund& Mitronen, 2018, p.164).

Omni-channel strategy

With the emergence of the internet during the late 1990s, new companies focused on e-commerce. Soon, many retail chains established e-commerce sites, while many e-commerce firms simultaneously established fixed stores. Consequently, there was an emergence of so-called multi-channel retailing, which implies a separation between online and offline channel. In recent years, the notion of multi-channel retailing has gradually shifted to a focus on omni-channels, which means on seamlessly moving between the channels during one integrated purchasing process (Mason&Knight, 2019, p.45-55). Further researches prove that digitalisation transforms the retailing exchanges, blurs distinctions between products and services, retail setting and increases mixing of

human and digital technologies on both retailer and consumer side. Therefore, the dualistic separations between online and offline, digital and analogue, and material and virtual should be resisted in favour of more hybrid solutions which integrate these aspects in various ways (Hagberg, Sundstrom& Egels-Zanden, 2016, p. 698-705).

Physical store as a hub

In retail digital strategies physical shops should be perceived as hubs linking online and offline channels (Cao, 2014, p. 70). They are expected to become the source of value creation. Customers enjoy shopping online, but also love to touch products offline. If they are unable to get a consistent shopping experience within different channels, they are likely to move to competitors. Among the elements defying the consistency in shopping experience are alignment of prices, buying products online but returning offline in store. Some of the aspects that generate the value creation ares:

- efficiency, defined by free access to WiFi in-store, quick response code of the products

- novelty, meaning a new retail format to improve the shopping experience

- complementary services such as buy online and return offline, click and pick up

- lock-in, alignment of online and offline prices (Cao, 2014, p. 70-76).

The potential of the physical stores has also been also notices in studies of Laudon. He notices, that the ability of offline traditional firms to integrate their web and mobile operations with their physical store operations is of a high importance as it provides consumers with an integrated shopping experience and consequently leverages the value of physical stores (Laudon, 2018, p. 597-609).

Predictive shopping

Undoubtedly, the great opportunity for retail is predictive shopping owing to Big Data and powerful analytics programs. They have given marketers the ability to send personalised messages to consumers recommending products before they ask for them. Over time, the software keeps track of what customers purchased and learns to make better predictions based on what customers actually keep (Laudon, 2018, p. 626). Predictive shopping is already being broadly tested by Amazon. Thanks to the massive

date on our behaviours, machine learning and data analytics, it has developed a system called ‘anticipatory shipping’ where products are packed and shipped before actually being bought. This is believed to significantly reduce the delivery and to position stocks much closer to the customers (The Economist, 2019).

2.4. E-commerce in Switzerland

2.4.1. Influence on stationary retail

The influence of e-commerce on stationary retail is also visible in Switzerland, where the shift from stationary to online shopping progresses. According to the research of Gesellschaft für Konsumforschung GfK, which is presented in figure 3, Swiss consumers bought goods and merchandise online for CHF 9.5 billion in 2018, which means an increase of 10 % over 2017. It is also important to notice that the volume of small parcels from Asia continued to increase of 35% over 2017 (GfK, February 2019).

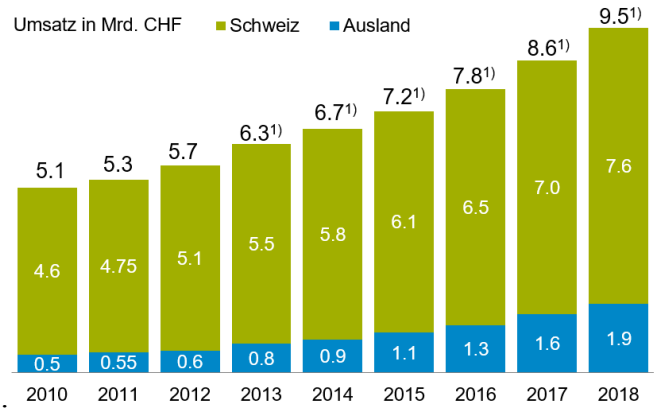


Figure 3: Development of retail revenue in Mrd CHF (Gesellschaft für Konsumforschung GfK, 2019)

Figure 4 represents the data on online shopping developing faster than traditional shopping in Switzerland (Gesellschaft für Konsumforschung GfK, February 2019).

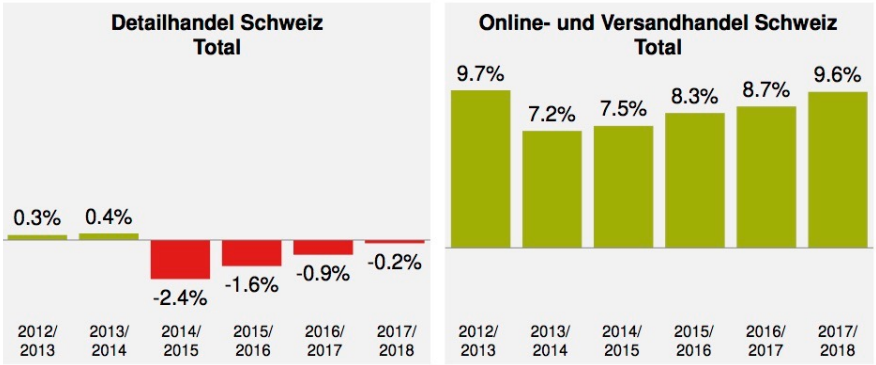


Figure 4: Online retail vs traditional retail (Gesellschaft für Konsumforschung GfK, 2019)

According to Bundesamt für Statistik BfS, private online purchases are the most visible consequences of e-commerce in Switzerland. As illustrated in figure 5, in 2017, almost 5 million people bought a product or service online per year which is 50 % more than in 2010. In the age group of 25 to 34 already 91% of respondents ordered goods or services online. In the most senior group the amount is less than 20% (Bundesamt für Statistik BfS, 2019).

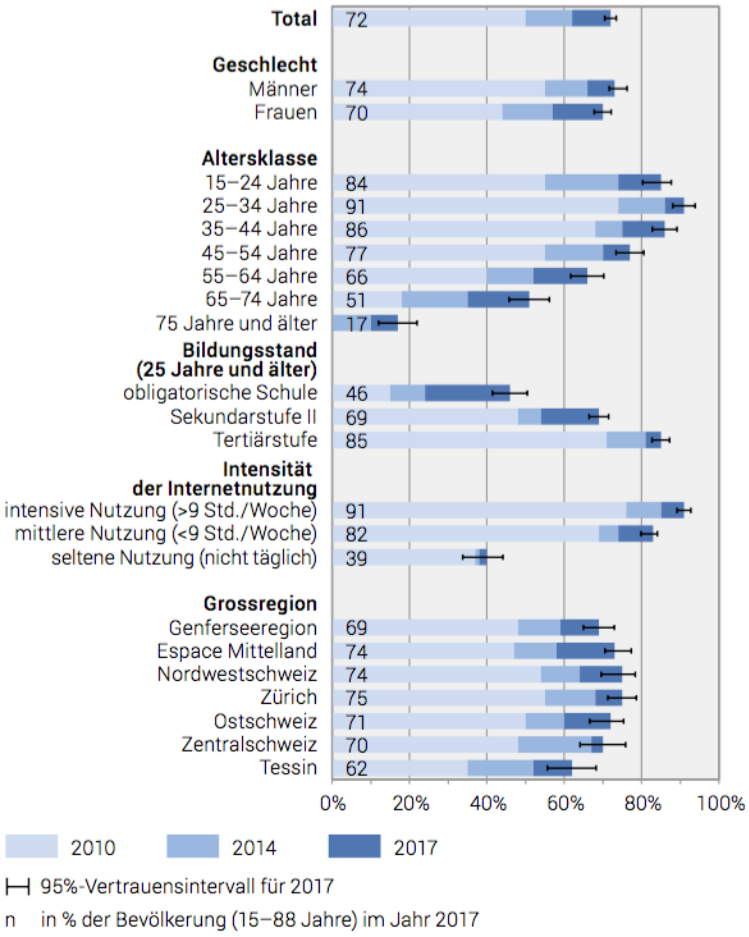


Figure 5: Online Shopping in 2010, 2014 and 2017 (Bundesamt für Statistik BfS, 2018, p.1)

The survey provides also data on types of goods and services purchase online. The biggest demand was registered for online plane tickets around 3.3 million people, then clothing (including shoes) around 3 million people and overnight stays in hotels. The young generation participates in e-commerce directly, whereas the senior generation has to change its behaviour. Therefore, there is still a growth potential in numbers of

participants in e-commerce. Further growth is also expected in the frequency and in the verity of online purchases (Bundesamt für Statistik BfS, 2019, p.2).

The market research conducted by Gesellschaft für Konsumforschung GfK also confirms that one of the best selling products were electronics with CHF 2.1 billion and items form fashion and shoes sector with CHF 1.8 billion. (Gesellschaft für Konsumforschung GfK, February 2019). This is illustrated in figure 6.

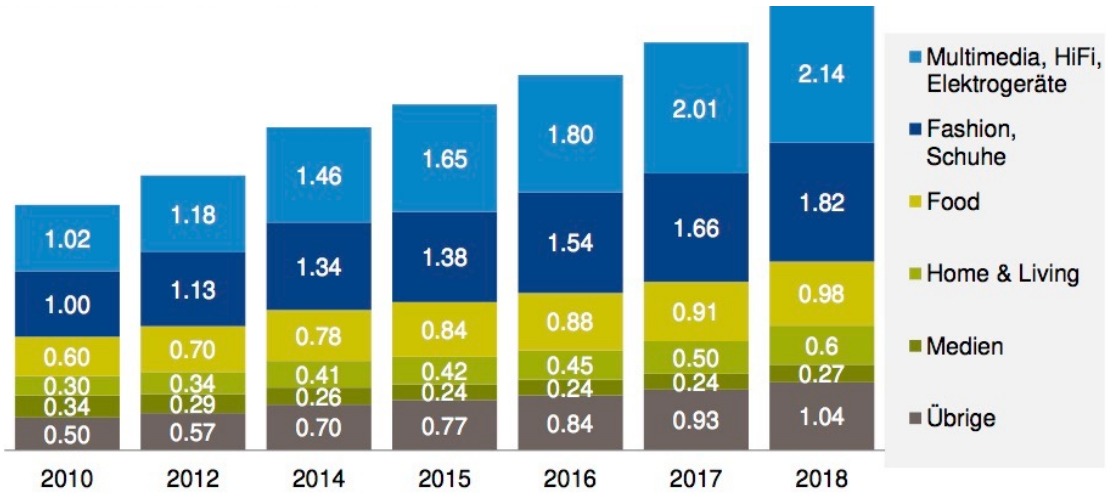


Figure 6: Sectors in Swiss Online retail (Gesellschaft für Konsumforschung GfK, 2019)

Despite the fact of being centrally located in Europe and easily accessible by all means of transportation, Switzerland managed to protect its economy for many years. Its online market was dominated by notional providers for a long time. The change started in 2011, at the time when Euro collapsed for the first time and the Swiss Frank got stronger. It was also the time when Zalando entered the country. Presently, the national providers fear not only Zalando owing to its huge online market share but also Amazon due to its ability of dominating the market and Chinese suppliers because of their unbeatably low price (Wölfe &Leimstoll, 2019, p.2-3).

Futhermore, the development of online shopping has an impact on stationary shopping. Large players like fashion house Schild will soon disappear as its owner Migros sold the brand in 2018 and its stores have already been let or are being advertised for lease. Contrary to the trend of large format stores, some luxury brands are opening smaller stores in swiss main cities. The reasoning is probably the increasing number of tourists. The dominant Swiss players Coop and Migros are developing new store formats and

online channels, opening new locations and restructuring existing brands (CBRE, 2018, p. 8-12). According to the research conducted by the Swiss Retail Federation, as illustrated in figure 7, the most important factors of choosing a location among non-food retailers are frequency of passers by and rental prices (Swiss Retail Federation, 2019).

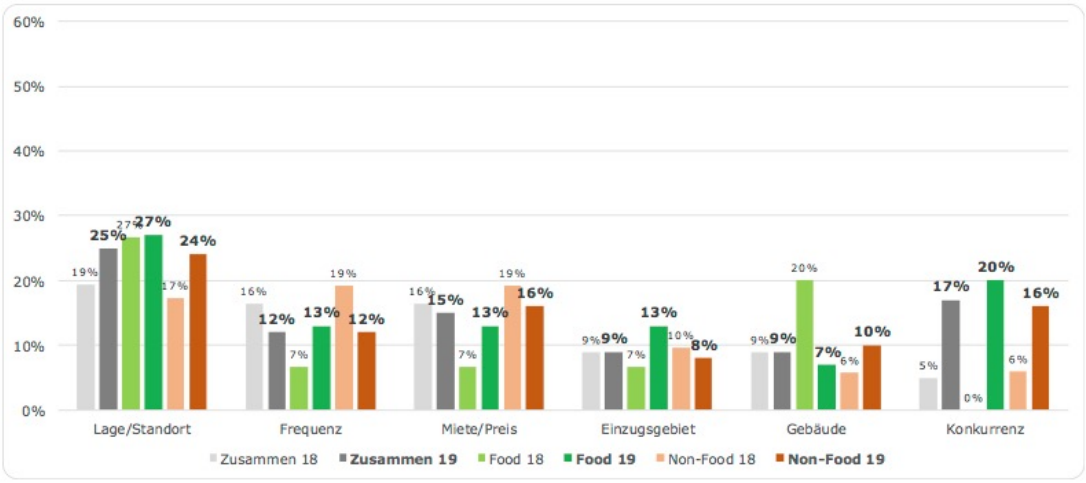


Figure 7: Factor considered when choosing a location (Swiss Retail Federation, 2019)

Moreover, according to Gesellschaft für Konsumforschung GfK, the Swiss consumers have one of the highest purchasing power in Europe (Gesellschaft für Konsumforschung GfK, 2018). Not surprisingly, many international and local retailers would wish to benefit from both local purchasing power and shopping willingness of rich tourists in the country. This is reflected in level of occupancy of retail premises at the best central locations. For instance in Zürich there are hardly any empty stores in the centre. Local non-chain retailers are often not able to afford the high rents and left, making space to international brands. The number of overseas tourists is believed to rise and a shortage of possible locations for exclusive stores in the old town is expected to remain. There is a big demand for stores up to 300 sq m. However, there is a sinking demand for very large, multi-storey retail spaces. (CBRE, 2018, p. 22).

Demand for smaller retail surface is also visible in the market research of Wüest und Partner. The following tendency has been shown: the smaller the surface, the shorter the advertising time. This is illustrated in figure 8 (Wüest und Partner, 2019, p.71).

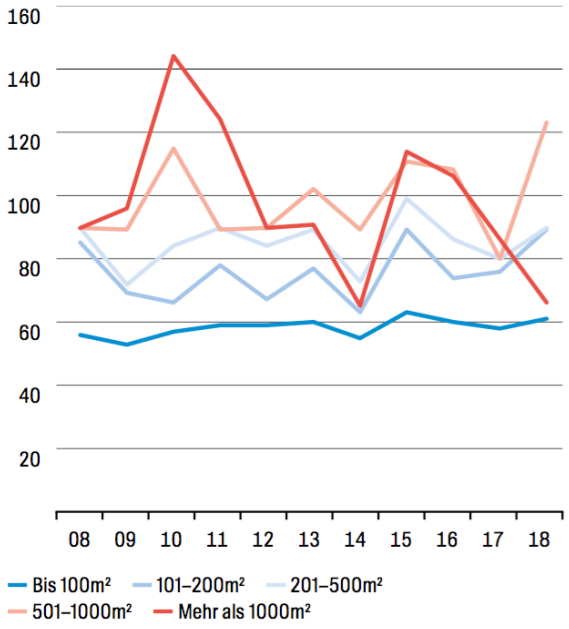


Figure 8: Advertising time according to the amount of square meters (Wüest und Partner, 2019, p.71)

2.4.2. Influence on logistics

One of the main objectives of retailers in order to compete with e- retailers is to reduce the high costs of transportation and to decrease the delivery time. First of all, instead of owing and holding every item, retailers must develop a responsible supply chain with efficient and fast logistic processes. Goods ought to be delivered directly from the manufacturers warehouses to consumers. Secondly, goods have to be stored closer to consumers. (Mercier, Jacobsen& Veitch, 2018, p. 6).

In Switzerland retailers continue to invest in their own logistic infrastructure including warehouses, for instance inter discount and microspot opened their new logistic centre in Jegensdorf last year. The aim of the measures is to provide Next Day Delivery for the largest possible assortment. In lower margin sectors, B-Post is the standard, which extends the delivery time to two days. The Same Day Delivery is available from some providers only and almost always at extra costs. The research of Wölfe & Leimstoll shows that consumers presently do not necessarily expect the delivery on the same day, when being charged extra. The largest retailers are expected to expand their own service

in logistics. In this way, they want both to further improve the consumer experience and reduce costs. Reduction of delivery time can happen thanks to decentralised warehouses and deliveries in the local environment for instance with bicycle couriers or small vehicles. STEG Electronics already uses its 15 branches to deliver orders within a few hours on the same day. Other companies are also working on improving their services in this field. Ship from Store can be a solution if goods are to be shipped very quickly in the regional environment. All this needs a very advanced digitalisation of the whole supply chain (Wölfe &Leimstoll, 2019, p.41-42).

2.4.3. Main provides

The main online players in Swiss e-commerce are international providers Zalando, Amazon, and Chinese Suppliers. They all threaten the manager of the big physical stores. Additionally, there are local players such as Galaxus and siroop, which try to compete with the international big brands. The compression between big shopping centres and online platforms is presented in figure 9 (Wüest und Partner, 2019, p.67)

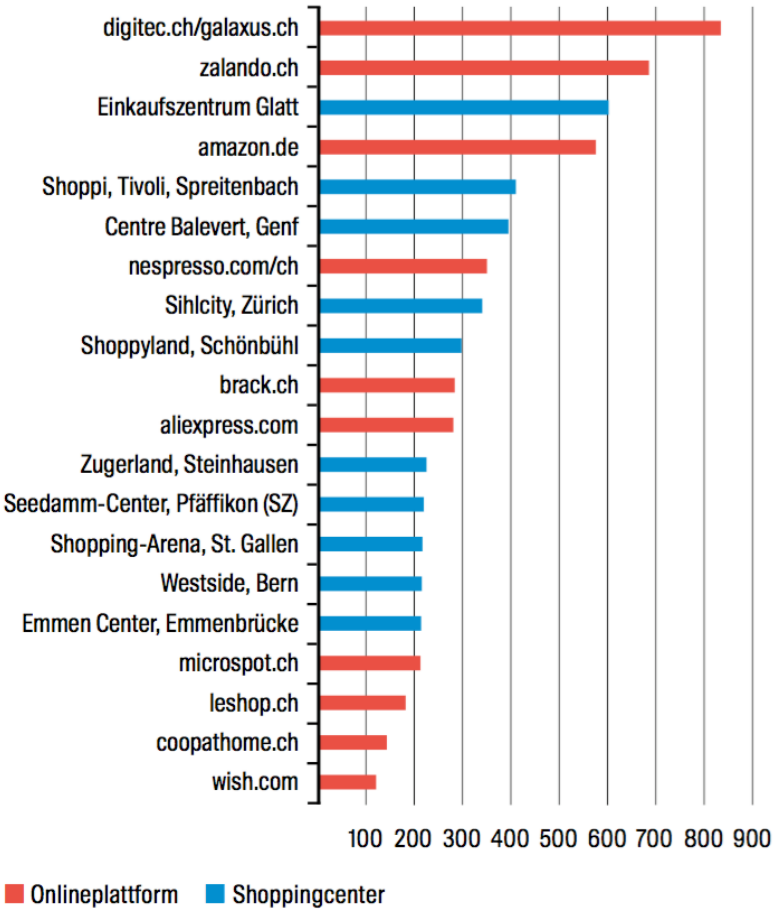


Figure 9: Revenue of the biggest online platforms and shopping centres in Switzerland (Wüest und Partner, 2019, p.67)

Amazon

Entering of Swiss Market by Amazon is feared among local suppliers. the reason for that is that it proved its ability of dominating a market at a very fast pace. It can been perceived in the Online Monitor 2019 published by the German Retail Association HDE, showing the biggest winners of e-commerce growth. Over 46 Percent of revenue of e-commerce belongs to Amazon in 2018. (German Retail Association HDE, 2019). Its exceptional ability of attracting consumers is both admired and feared.

Zalando

Another big international player is Zalando, whose entry in Swiss market after 2011 was immediately noticed. The economists at Credit Suisse report that the German retailer's sales in Switzerland almost reached 800 million Swiss francs in 2018 (figure 10), which is one-tenth of the total sales of the clothing and footwear retail sector in the country. According to the analysis in Credit Suisse Outlook 2019, it is estimated that the Swiss spend three times more per capita on Zalando as consumers in Austria or Germany. Zalando´s unbroken development and consumer friendly services such as free delivery and return are astonishing. Additionally, it already offers a next day delivery service, which despite the additional fee has been positively received by Swiss consumers. Moreover, Zalando continuously manages to enlarge its international bunch of brands (Credit Suisse, 2019, p. 17).

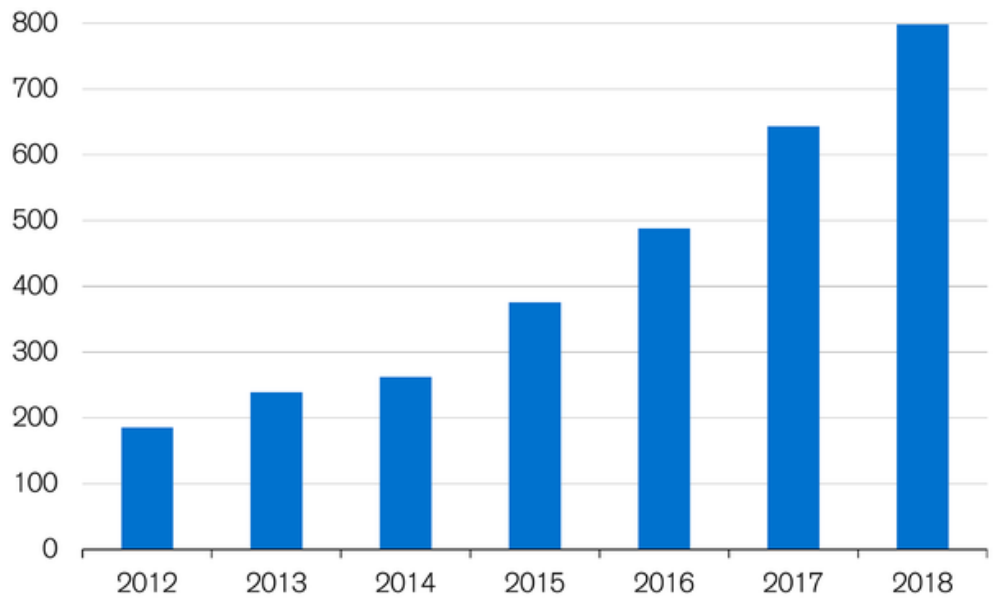


Figure 10: Zalando`s growth in Switzerland in millions (Credit Suisse, 2019, p. 17)

Chinese suppliers

Another competitor for the local retailers can be seen in Chinese suppliers. Over 14 million of small parcels were registered in Switzerland in 2017, which constitute a 50 % increase to previous year. The Asian providers can compete with cheap prices. This is possible thanks to low production costs in China and due to exemption from import tax and custom duties for small amounts. Furthermore, there are subsidies for parcels from China according to the regulation of the World Postal Union. The preferential conditions will not last forever but are surely advantageous in the first phase of entering the European Market. Chinese supplies plan to establish their logistic infrastructure in Europe, mostly in France and Bulgaria to shorten the delivery time to european customers (Wölfe & Leimstoll, 2019, p.34-38).

Social platforms

Finally, the growing importance of the social media platforms has to be considered. Google and Facebook already function as search engines and marketing. They are easily able to integrate a buy option within their platforms and become important players in e-commerce.

Swiss providers

Swiss local providers are also developing. Here the attention should be drawn to Galaxus, siroop and microshop. All of them have invested significant funds in brand development in 2017 and increased their profits in e-commerce (Wölfe & Leimstoll, 2019, p.6).

2.4.4. Challenges and problems of online shopping

Challenges

The man challenges of Swiss e-commerce is that today´s customer expects best value, best service or best experience. If retailers are unable to provide customers with any of the three, customers in a world of transparency, are very likely to move to other providers. Retailers with the best service should excel for instance at efficient and convenient delivery services. Those with best value ought to provide with high quality products. Finally, those boosting with the best experience need to offer great support,

selection and payment services as well as experience-oriented shopping (Mercier, Jacobsen& Veitch, 2019, p. 6).

Swissness which became a synonym for high quality and innovation is a challenge for all retailers operating in Switzerland. Those values should be transfigured to products and services in the country. Local consumers also expect high level of service and high quality of products (Stadt Zurich, 2017).

Due to the fast pace of life and and new ways of working people also tend to do shopping on a go. Consequently, transportation hubs - airports and railway stations- are being used as new marketplaces. For instance, Zurich main station registers up to 500 000 passers-by per day, which makes it the most frequently visited place in the country. In addition to it, being open all year round thanks to liberal opening hours regulations for train stations makes it a very attractive spot for retail. The challenge here is the quality of customer experience. The dense flow of people does not encourage any relaxation or leisure. Consequently, people tend to spend there less time and purchase only products which they really need. (Stadt Zurich, 2017).

Problems

Finally, an erosion of foot traffic in less central locations constitutes a problem for retail. Consumers buying online, visit some traditional brick-and-mortar stores less frequently. They tend to go out more for leisure and gastronomy than for pure shopping. This changing traffic patterns requires new ways of attracting consumers to the stores, new services such as in-store pick-up or advisory and hybrid shop formats. For instance a Swiss brand, Swatch, uses pop-up store to efficiently use the store footprint and thanks to an additional program such as concerts or festivals attracts consumers (Mercier, Jacobsen &Veitch, 2019, p. 12).

According to the research of Bundesamt für Statistik BfS, the biggest problem reported by consumers was a longer than expected delivery time. The second biggest problem were of a technical nature, website not working properly (Bundesamt für Statistik BfS, 2019, p. 4).

3. Methodology

Data was acquired through a questionnaire distributed among retailers. Selected answers were visualised in summarising graphics. Data analysis techniques involving simple comparisons and T-Test were conducted in order to investigate the statistical differences between different groups.

3.1. Questionnaire

A questionnaire (Appendix 1) was sent out electronically[7] among various retailers, being members of Swiss Retail Federation, business partners of KPMG and others. It was opened for over 25 days. The questionnaire was structured according to the conditional question: `How do you consider the impact of e-commerce on your retail.?` Over 35 retailers participated in the survey. The sample consists of 29 % retailers in clothing sector, 23% in sportswear sector, 16% shoes and bags sector, 16% underwear and 13% in watch sector. The mostly represented group 67% sells goods to adults. Due to the confidentiality requirement of participants, the collected data had to be fully anonymised.

3.2. Potential bias

It is possible that there are potential biases in the collected data regarding the level of digitalisation of retailers. First of all, the digital fluent retailers are said to be more likely to answer the online survey. It is assumed that many of the less digital fluent retailers did not participate, thus giving huge variable difference between retailers who declared low over high impact of e-commerce.

3.3. Data preparation

The outcome of the survey as raw data is presented in Appendix 2.

In order to enable the difference between means test the text values were converted to numeric values.

[7] The questionnaire was prepared in an online survey cloud-based software SurveyMonkey

Converting text to number values

For questions regarding preferences the following rule presented in Table 1 has been applied:

text value	numeric value
ja	1
eher ja	1
eher nein	2
nein	2

Table 1: Converting variables from text values to numeric values for T-Test.

For questions regarding subgroups the above conversion presented in Table 2 has been applied.

text value	numeric value
Kids	1
Teenager	2
Erwachsene	3
Seniors	4

Table 2: Converting subgroups from text values to numeric values for T-Test.

The answered prepared for the analysis have been presented in Appendix 3.

Missing values

Some of the respondents did not answer all the questions, leaving a field empty. In this case the respondents were ignored.

3.4. Data analysis

The following data analysis have been used:

Basic aggregations

In order to estimate the relevance of e-commerce, simple comparisons were applied using Excel basic functions and graphic representations. This gave the possibility of making conclusions on topics such as differences in business models.

T-Test

The T-Test was carried in order to verify the difference between means of two separate groups of retailers. The sample sizes, means and variances are presented below in Appendix 3.

The following formulas unequal variances have been applied:

$$d = \frac{\bar{x}_1 - \bar{x}_2}{\sqrt{\frac{s_1^2}{n_1} + \frac{s_2^2}{n_2}}}$$

$$df = \frac{\left[\frac{s_1^2}{n_1} + \frac{s_2^2}{n_2}\right]^2}{\frac{(s_1^2/n_1)^2}{n_1 - 1} + \frac{(s_2^2/n_2)^2}{n_2 - 1}}$$

$$s_1^2 = \frac{\sum_{i=1}^{n_1} (x_i - \bar{x}_1)^2}{n_1 - 1}$$

$$s_2^2 = \frac{\sum_{j=1}^{n_2} (x_j - \bar{x}_2)^2}{n_2 - 1}$$

4. Discussion and summary of results

The objective of this thesis is to verify if and how retailers in the German-speaking part of Switzerland are affected by the e-commerce in regard to the declared low, middle or high pressure. The following terms have been used :

Low impact group - in this thesis the term is used for retailers who declare a low impact of e-commerce

Middle impact group - in this thesis the term is used for retailers who declare a middle impact of e-commerce

High impact group - in this thesis the term is used for retailers who declare a high impact of e-commerce

The most interesting findings are in the fields of real estate, customer experience as well as new business models and digitalisation strategies.

4.1. Impact of e-commerce on retailers

The impact of e-commerce on traditional retail has been confirmed. 21 out of 37 participants in the survey declared the high impact, 10 declared the middle impact, whereas only 6 evaluated it as low. This equals 57 % for *High*, 27% for *Middle* and 16% for *Low,* which is illustrated in Figure11.

Impact of e-commerce on retail

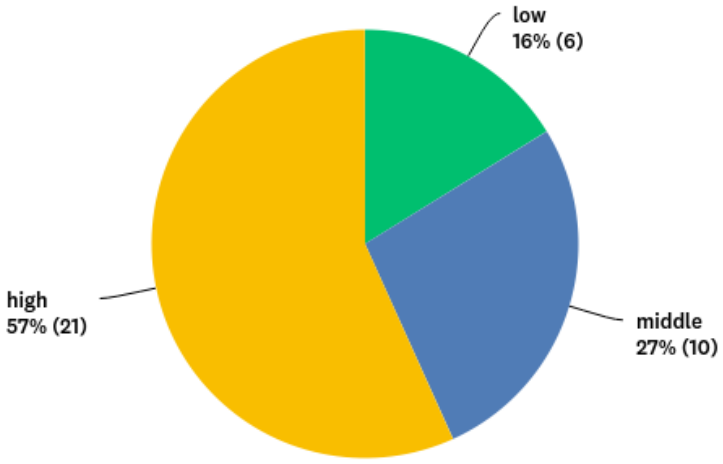


Figure 11: The impact of online shopping on retail business

The majority of retailers who participated in the survey represent a clothing sector (29%), then sportswear (23%), shoes and bags (16%), underwear (16%), jewellery (13%) and other (3%). There are interesting characteristics between the low, middle and high groups, shown in figure 12. First of all, the most significant is that representatives from jewellery and watches sector do not perceive a big pressure of e-commerce. 100% of respondents from this group noticed the low impact. In contrary, the retailers from clothing sector (67%) and sportswear sector (71%) notice significant effects of e-commerce on their business. This finding can be confirmed by the market research conducted by Gesellschaft für Konsumforschung GfK, which states that one of the best selling products in Switzerland were electronics with CHF 2.1 billion and items then form fashion and shoes sector with CHF 1.8 billion (Gesellschaft für Konsumforschung GfK, 2019). Since there were no participants from the electronics sector in this survey, it is impossible to compare the findings of this particular group.

Retailer´s primary sectors

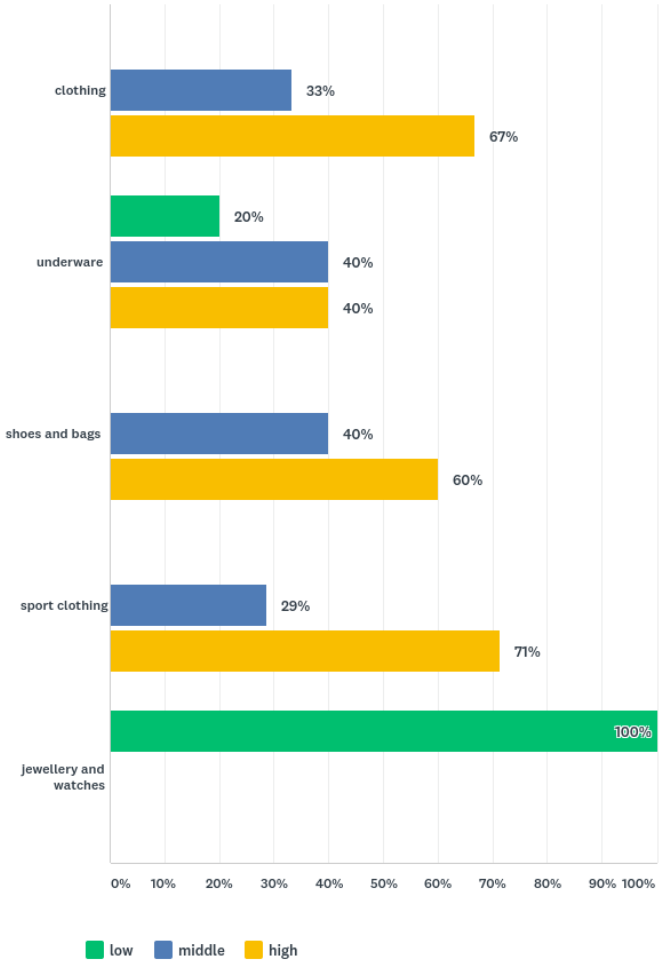


Figure 12: Main sectors

Furthermore, most of the participants of the survey have stores in city centres (54%), then shopping malls (39%) and at train stations and airports (7%). Figure 13 shows differences between the low, middle and high impact group. Retailers having stores in shopping malls (60%) perceive a higher pressure of e-commerce than those with stores at train stations and airports (50%). Retailers who perceive a low pressure are present in central locations. It can be confirmed by the finding of CBRE that some luxury brands are opening stores in swiss main cities, despite of the e-commerce pressure (CBRE, 2018, p. 8-12). In terms of the online presence the High impact group declared Zalando and Amazon as their main digital platforms. The Middle group uses their own platform, while none of the retailers selected Galaxus. The popularity of Zalando can be confirmed in the local market research of the economists of Credit Suisse (Credit Suisse, 2019, p. 17). Additionally, the researchers Hänninen, Smedlund & Mitronen state that due to high costs for small retailers the solution is to be present on big international platforms (Hänninen, Smedlund, Mitronen, 2018, p.164).

Location of stores

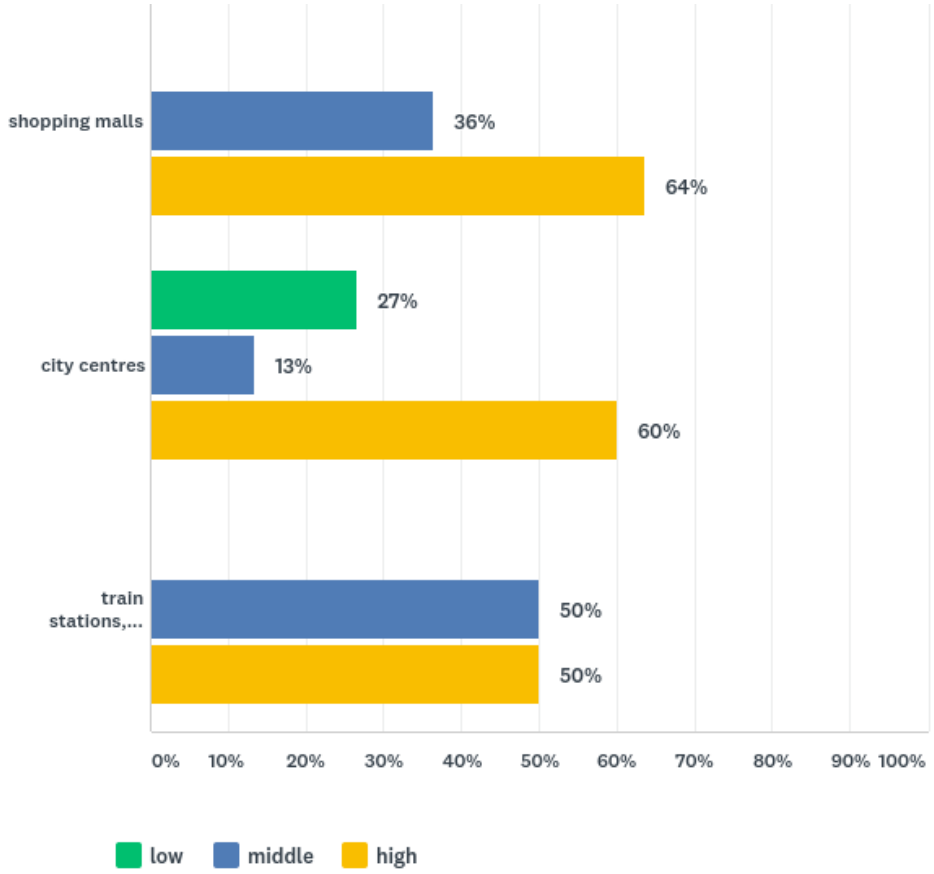


Figure 13: Location of stores

Most participants of the survey sell goods to adults (67%), then retired people (22%), teenagers (7%) and finally kids (4%). There are significant differences within the groups of low, middle and high impact. Retailers who declared low impact rather sell goods to retired people (67%), whereas the high impact group targets adults (78%) and teenagers (100%), which is presented in figure 14. Here, it is important to notice that if a person who actually purchases a product were considered, then the percentage of the adult group would be even higher. The findings on target groups were additionally verified by T-Test (Appendix 3). Firstly, the text values of adults, seniors and teenagers have been converted to numeric values. Secondly, in order to verify the difference between means of low and high groups, a t-test with unequal variances has been applied. It has confirmed that there is a statistically significant difference between the groups. Then, the same T-test on middle and high group has been applied, showing that there is a statistically significant difference between the groups.

Retailer´s main target groups

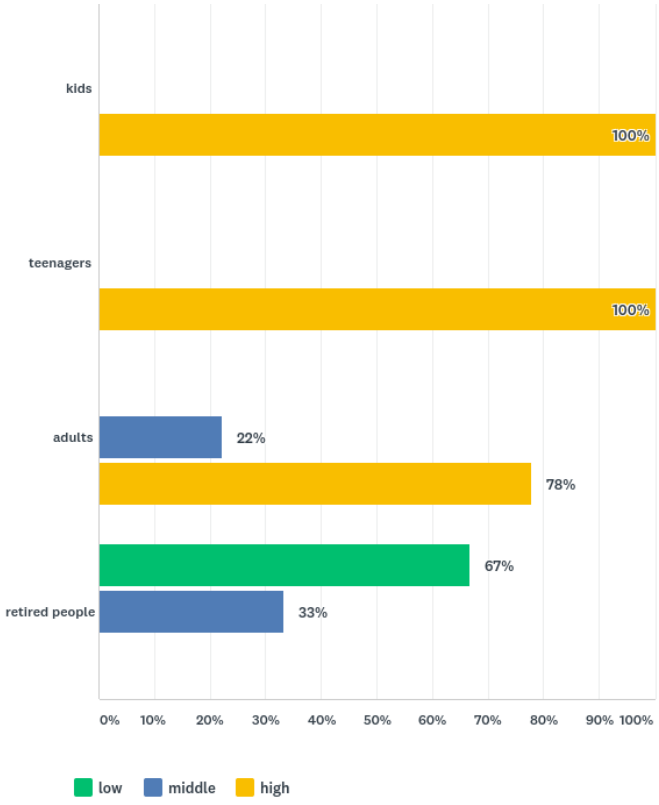


Figure 14: Target groups

The questionnaire was answered by 43% retailers positioned in middle price segment, 36% in high price segment and 21% in low price segment. Findings in terms of positioning of goods in different price segments for all three groups are shown in figure 15. The High impact group belongs to the low price segment (100%), whereas low impact group rather sells its products in high price segment (50%). Retailers who declared the middle impact are position in both middle price segment (25%) and high price segment (40%).

Retailer´s price segments

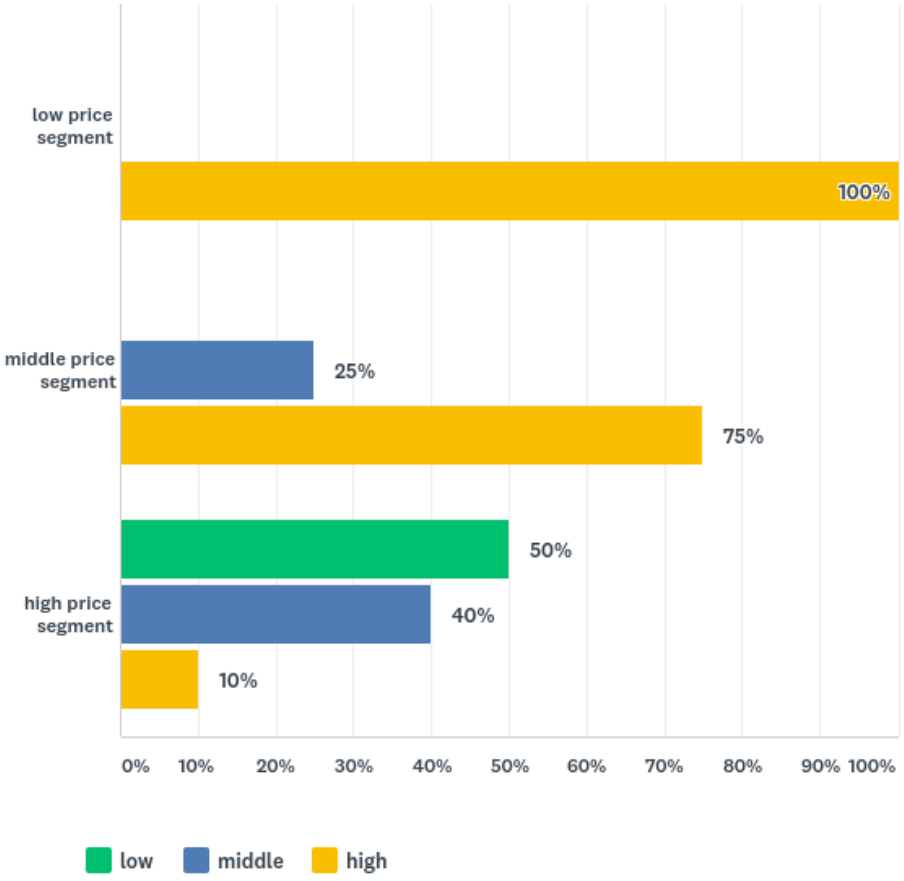


Figure 15: Price segments

4.2. Preferences in real estate

Regarding the real estate preferences of retailers two types of properties were distinguished: stores and logistic surfaces.

4.2.1. Stores

Surprisingly, the aggregated results on weather to open a new store do not show any strong tendencies. 57% of all retailers chose for `rather yes` answer and 43% chose `rather no` answer. The difference on deciding whether to open a new store between the low, middle and high impact group is also little. Figure 16 illustrates that 38 % of `rather yes` replies belong to the middle impact group and 44% to high impact group. It can be explained by the necessity of introducing new shop formats. Furthermore, figure 16 illustrates that 25% of `rather no` replies belong to the low impact and also 25% to the middle impact group, 50 % to the high impact group. The results have been additionally verified by T-test. (Appendix 3). It has confirmed that there is no statistically significant difference between the low and high impact groups and that there is no significant difference between the middle and high impact groups.

Willingness of opening a new store

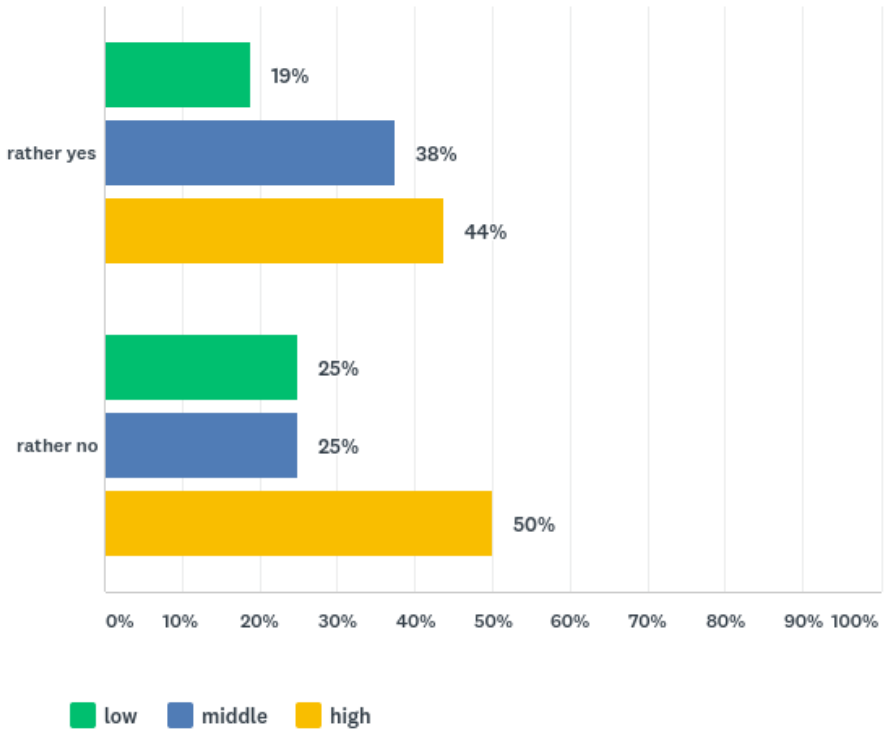


Figure 16: Willingness of opening a new store in the coming 2 years

Regarding store formats, the aggregated results are in favour of pop-up stores with 44%, then showrooms 31% and the last popular ones are traditional stores with 25%. The low impact group is the most likely one to open a traditional store (50%) whereas a pop-up store is the most preferable by the high impact group (57%), which shows figure 17. A pop-up store was not selected by the low impact group at all. The popularity of a pop-up format among the high impact group can be explained by the innovative business approach and marketing of this group. Retailers perceiving high pressure of e-commerce look for new store formats which help to increase brand awareness, promote collections and test market concepts (Warnaby, Shi, 2018, p. 11-23).

Types of store formats

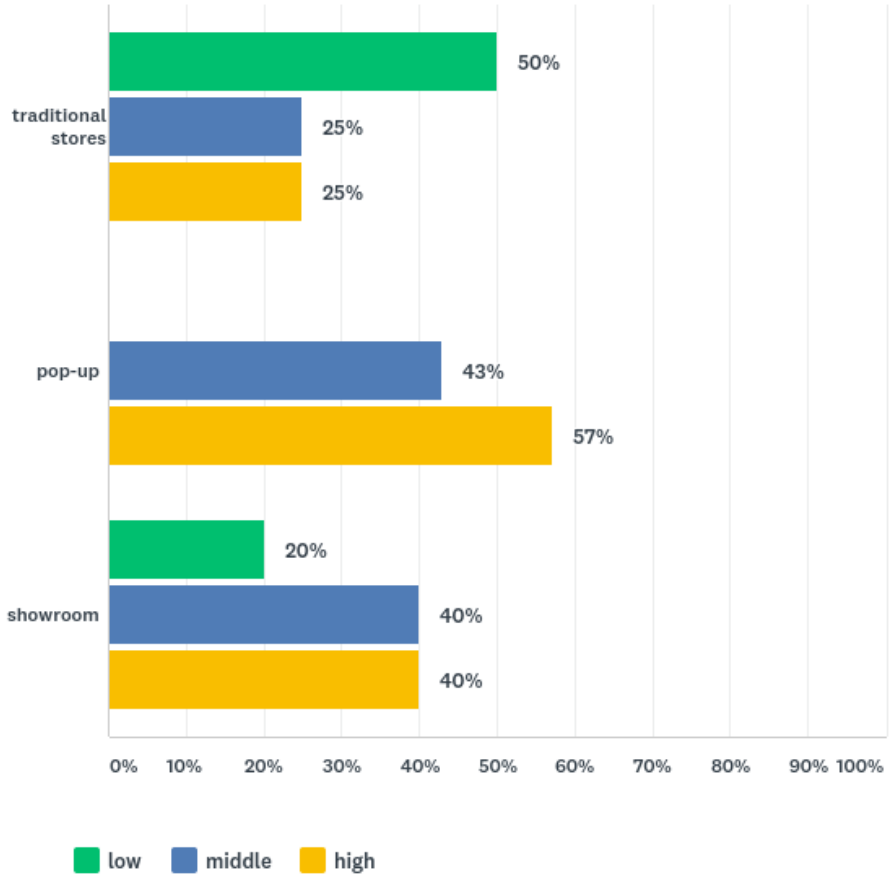
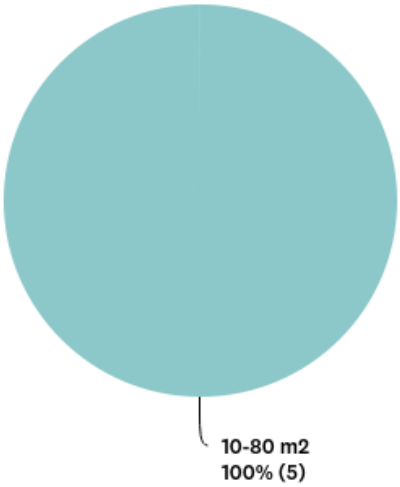


Figure 17: Store formats

Figure 18 illustrates the size preferences of new shop formats. The aggregated results of the groups show that retailers who selected a pop-up store require a square meter area of between 10 and 80 sq m. The most preferred size of a showroom is between 100 and 300 sq m. This is also reflected in the studies of CBRE, which report a big demand for stores up to 300 sq m and a sinking demand for large, multi-storey retail spaces. (CBRE, 2018, p. 22). Also Wüest & Partner state that there is a greater demand for smaller store formats (Wüest und Partner, 2019, p. 71).

Pop-up store



Showroom

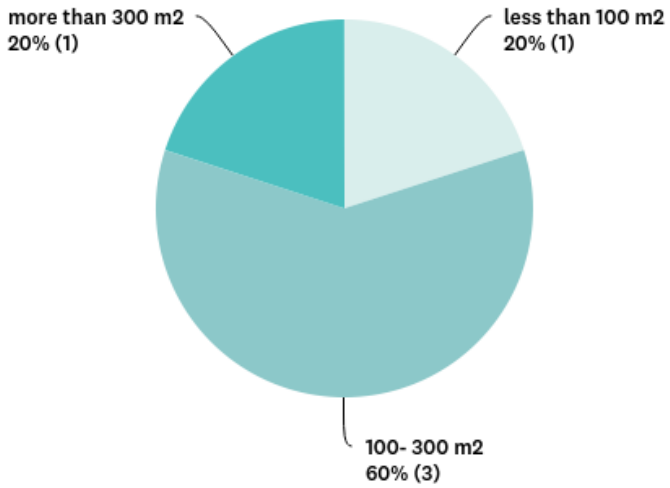


Figure 18: Sizes of new store formats

The research also investigated factors influencing a location for a new store. The aggregated results shown in figure 19 present that the most relevant is the frequency of passers-by, which was declared by 78%. On the second position is accessibility by public transportation with 63%. The last important ones are customer pool (3%), flexibility of space (16%) and store size (16%). According to the research conducted by the Swiss Retail Federation, also one of the most important factors influencing a choice of a new location among non-food retailers was the frequency of passers-by (Swiss Retail Federation, 2019).

Important factors considered by selecting a new store location

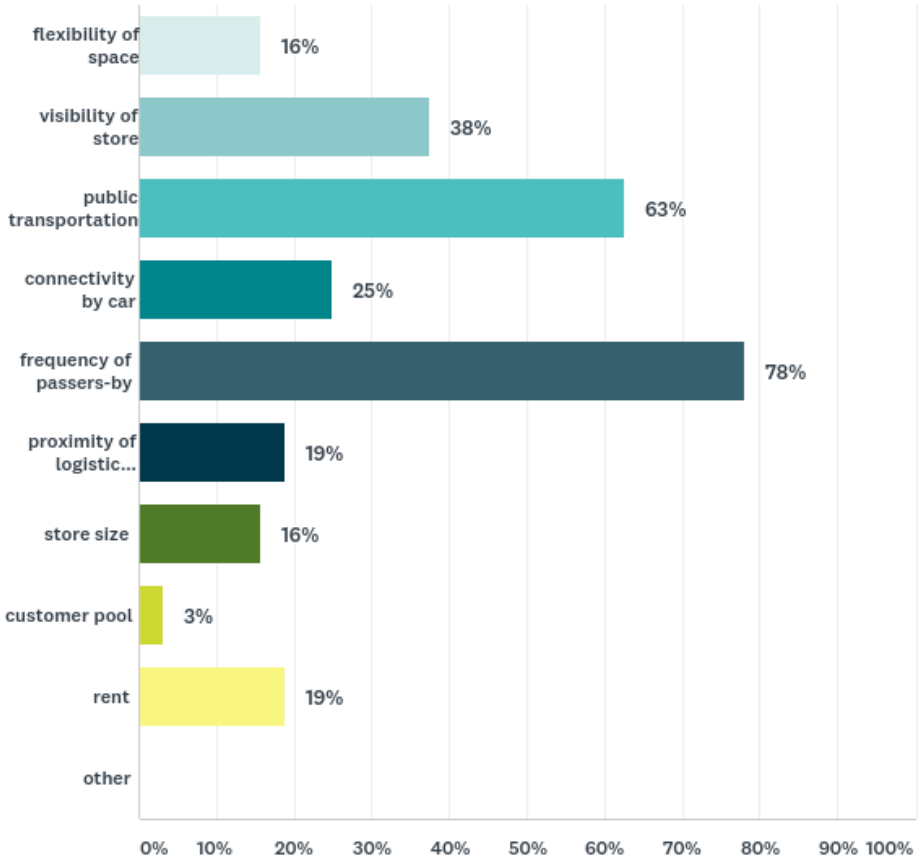


Figure 19: Factors taken into consideration when looking for a new store location

The most popular synergy effect among all retailers have been presented in figure 20. According to the aggregated results of the three groups, when looking for a store locations the most popular one is gastronomy. 81% of participants consider different forms of restaurants, cafeterias and snack bars as the best mixed-use partner. The last

important were wellness (3%) and education (13%). Surprisingly, bars were selected only by 16% of respondents. This is most likely related to the opening hours. Shopping takes place during the day time, whereas people go to bars in the late evenings. It would be interesting to analyse the preferred synergy effects on special days like Black Monday or Christmas Sale Days. Most likely the outcome of a survey would differ as the opening time would also change. Due to the fact that it is a special case which occurs only a few times per year, it has not been investigated in this peper.

Preferred synergy effects

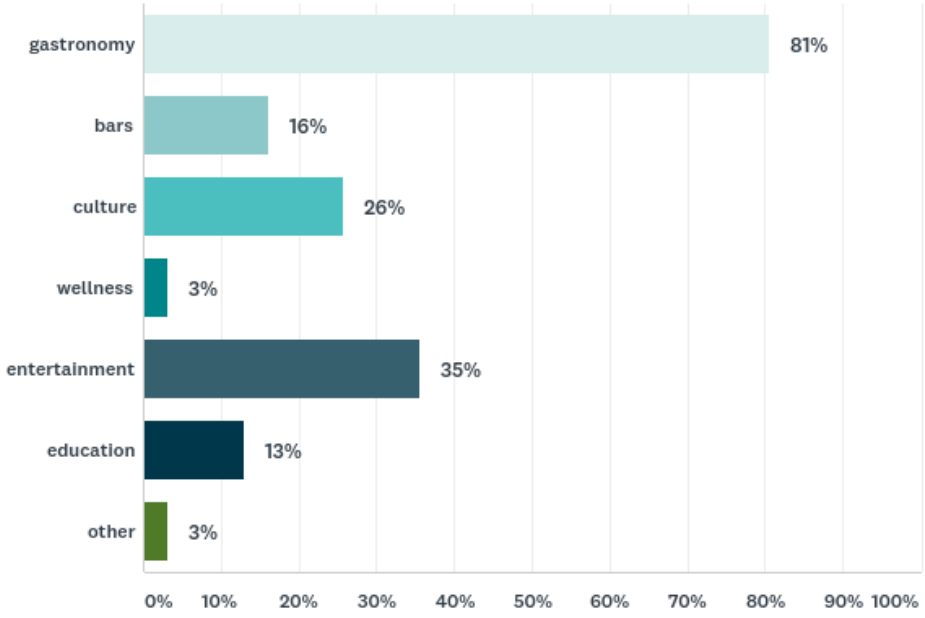


Figure 20: Synergy effects when looking for a store location

4.2.2. Logistic and storage surface

When analysing the pressure of e-commerce on retail, one also has to consider logistic and storage surfaces. The aggregated results of answers of all three groups show that retailers do not have any specific requirements for minimal surface for storage. 33% of participants chose for a surface between 2-50 sq m, 37% for 50-100 sq m and 30% for more than 100 sq m. This can be explained by different storage surface preferences on various locations within regional and local logistic centres. A further specification on location would be recommended when researching on logistics in detail. In this research it has been excluded due a limited number of questions allowed in the survey.

Furthermore, in regard to managing logistic surface, most of the respondents from all three groups declared that they outsource those services (70%). Only the minority of retailers manage their logistic surfaces on their own. This can be explained by the fact that most of the retailers uses die Post and other professional delivery companies. Additionally, most participants chose two day delivery (50%), than one day delivery (33%) and no delivery (20%). The two hours delivery can be offered only by 3% of retailers. This can be explained by the fact that B-Post is the today´s standard (Wölfe & Leimstoll, 2019, p.41-42). Figure 21 shows that there are retailers, the low and middle impact group, who do not offer home delivery at all. Additionally, one can see the following tendency: the higher the impact of e-commerce on retail, the shorter the delivery time.

Delivery time

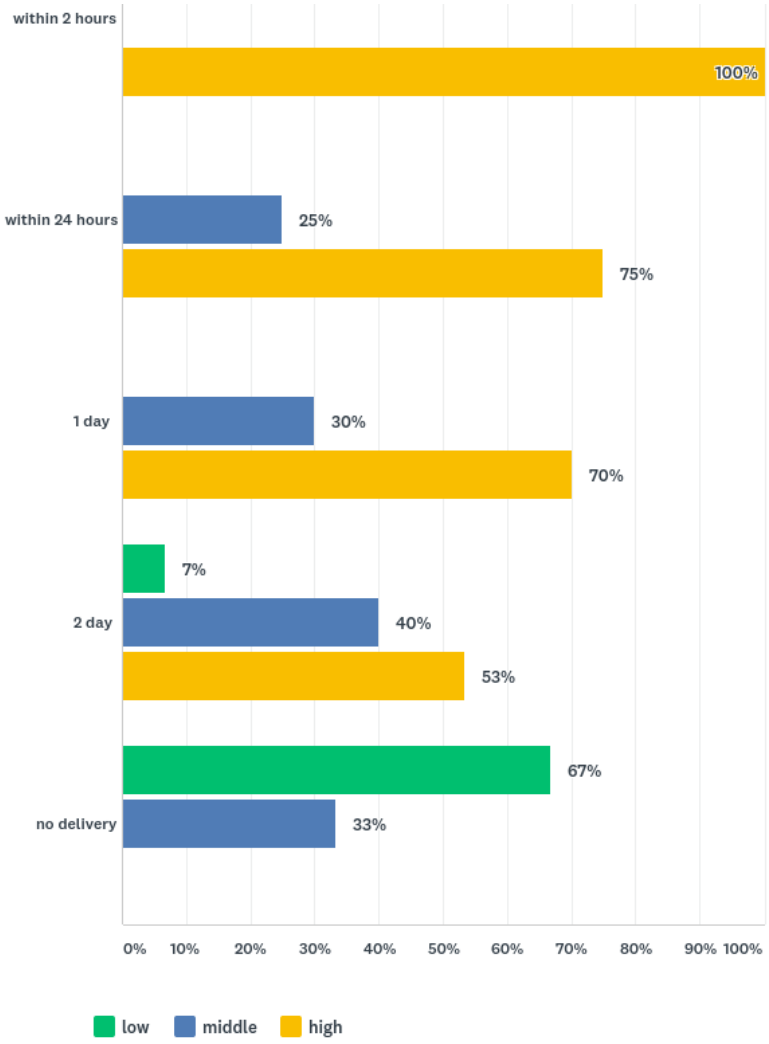


Figure 21: Delivery time

4.3. Customer experience

Customer experience is of a great importance in contemporary retail. Retailers declared various models in order to attract customers. Choosing more replies was allowed.

The aggregated results show that the most preferred business model are personal advisory with 57%, than high quality service with 50% and experience-oriented shopping with 40%. Figure 22 presents that the low impact group pays attention to high quality of service, whereas high impact one develops theme events (83%), experience-oriented shopping (92%) and personal consulting and training (76%).

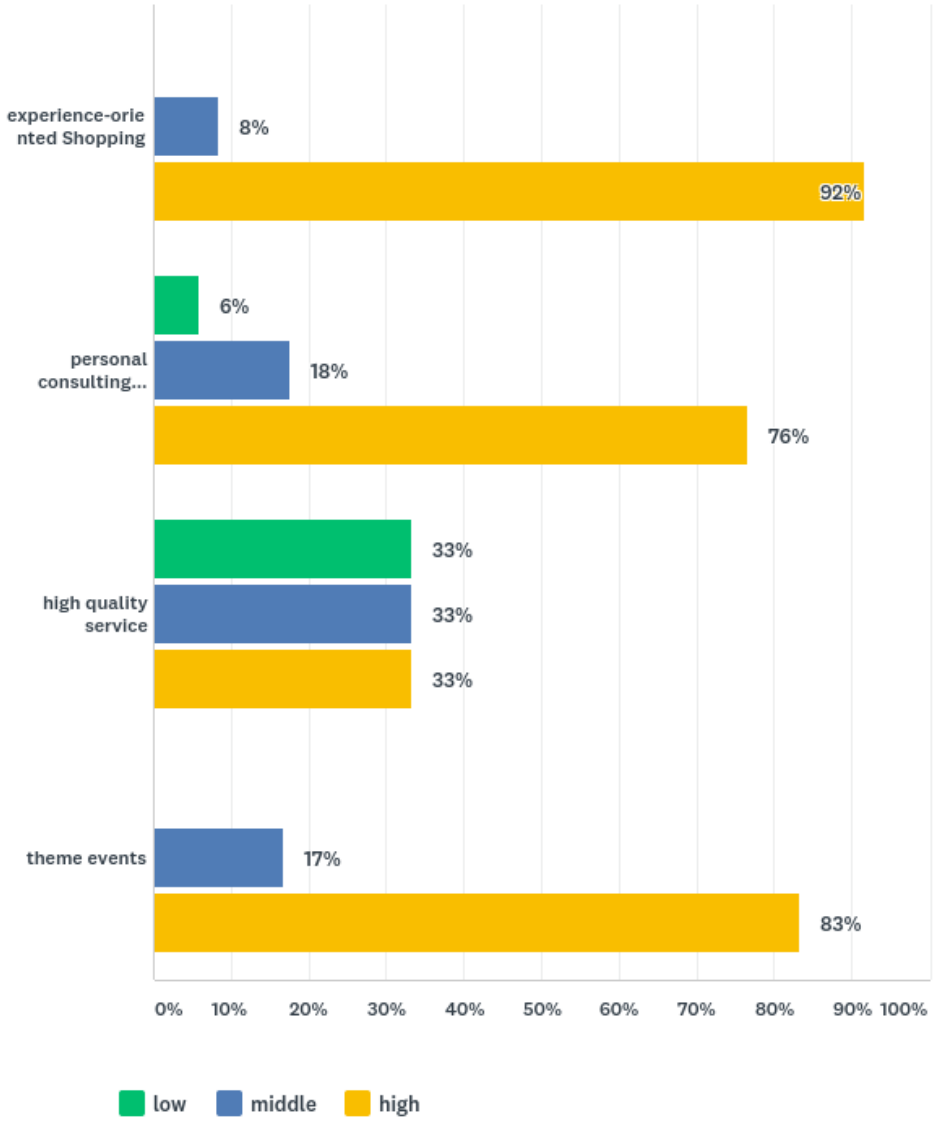


Figure 22: Business models

Further explanation on how to attract consumers to stores provide results of the question on additional services. The aggregated results show the importance of events (47%), consulting and training (43%) and pick-up points (40%). Figure 23 illustrates that the low impact group selected gastronomy and consulting, whereas the high impact group plans to develop pick-up point and organise events such as workshops, trainings and meeting with experts. The explanation of the bigger amount of models within the more affected groups is that those groups are forced to strongly react to the on-going transformation.

Additional services

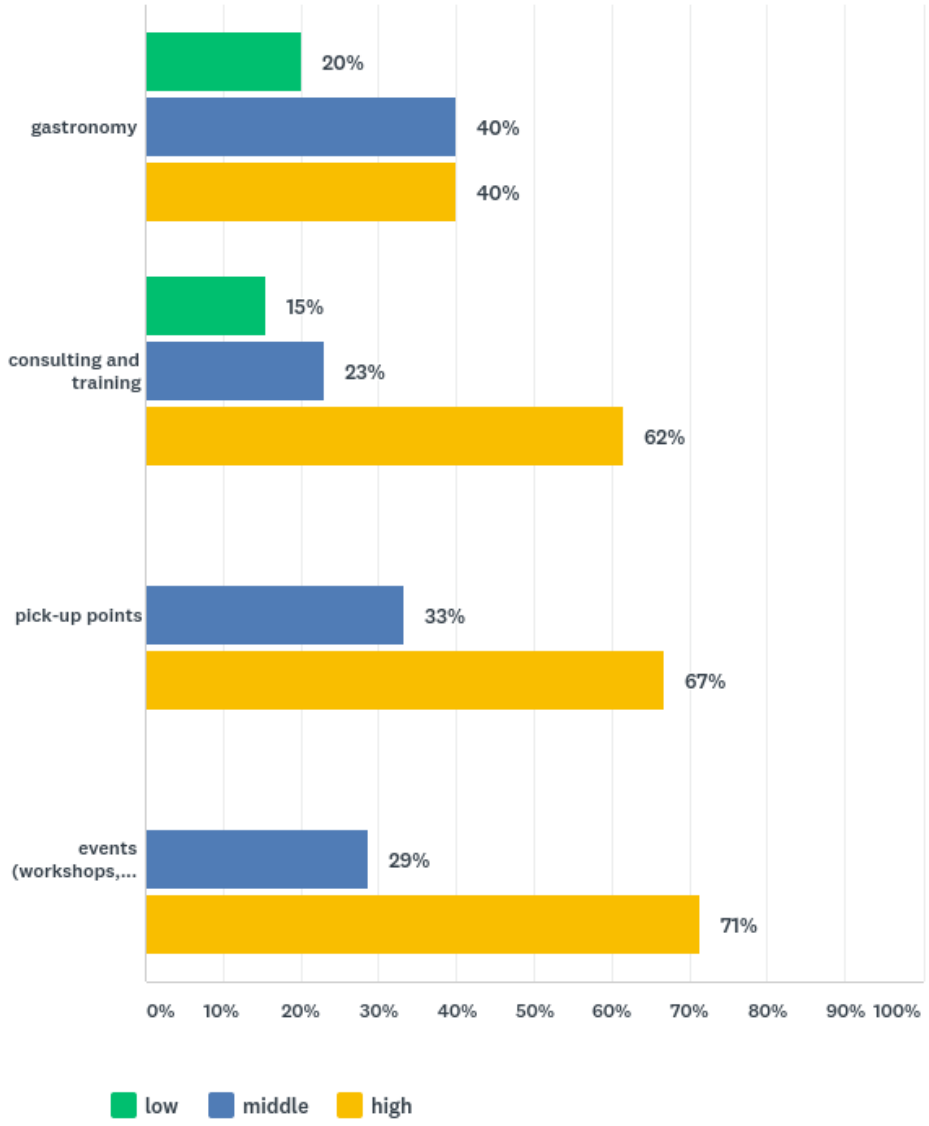


Figure 23: Supplementary services

4.4. Business strategies and digitalisation

The majority of all respondents are rather satisfied with their level of digitalisation (68%). As shown in figure 24, the satisfaction differ mostly between the low and high impact group. The findings of on digitalisation were verified by T-Test (Appendix 3). Firstly, the text values have been converted to numeric values. Secondly, in order to verify the difference between means of two separate groups of retailers, low and high, a t-test with unequal variances has been applied. It has confirmed that there is a statistically significant difference between the two groups. Then, the same test on middle and high group has been applied, showing that there is no statistically significant difference between the groups.

Satisfaction with digitalisation

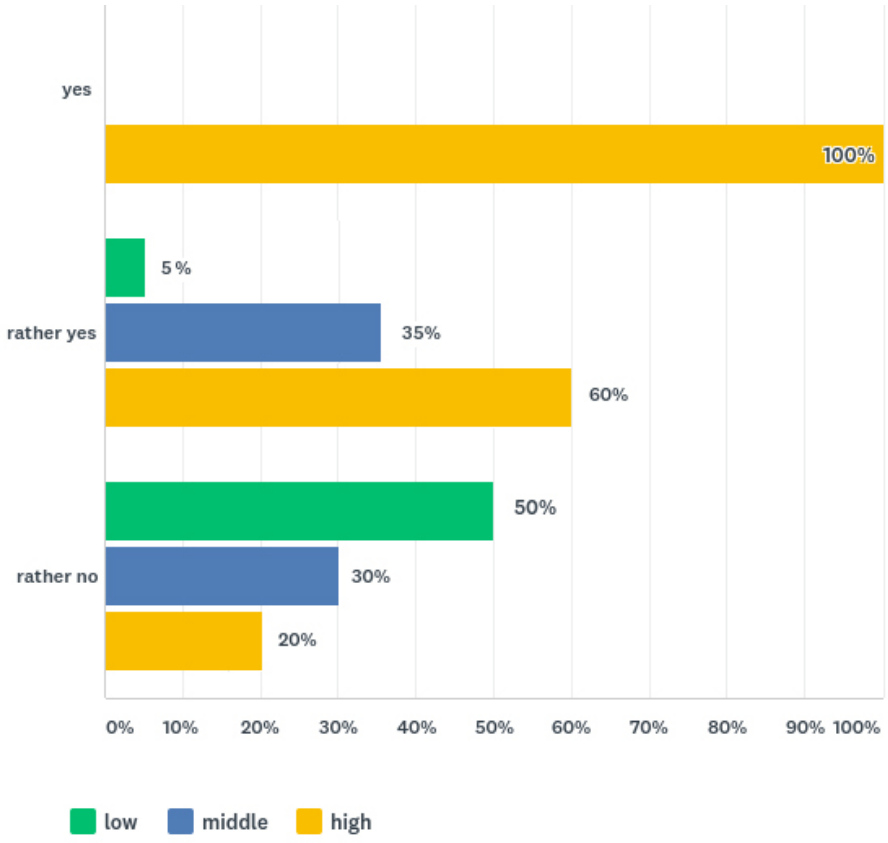


Figure 24: Level of satisfaction with digitalisation in retailers`business

Further questions referred to the advanced payment methods such as facial recognition, finger print or mobile payment. The results show that the majority of all retailers plan to introduce the methods. There is a positive correlation between the perceived level of digitalisation and plans on introducing progressive payment methods. The results have

been additionally verified by T-test (Appendix 3). It has confirmed that there is a statistically significant difference between the group low impact and high impact on their innovative payment methods and that there is no statistically significant difference between the middle and high groups. The relevance of this finding is widely discussed in literature, where a phenomenon of an impatient client is noticed. A contemporary costumer wishes to pay fast without typing his credit card details (Schleicher, p.18-23). Weill & Werner clearly state that easy payments with a smartwatch or fingerprints improve the customer experience (Weill, Woerner, 2013, p. 75-76).

Regarding new business strategies the finding from aggregated answer is that the majority of retailers plan to implement the omni-channel-strategy (88%). Also researchers Hagberg, Sandstorm & Egels-Zanden confirm that this strategy is of the biggest importance as focusing on seamlessly moving between the channels improves the consumer experience (Hagberg, Sundstrom& Egels-Zanden, 2016, p.6 98). Additionally, combined delivery with food (15%) and buy online and pick up offline (15%) were selected. Figure 25 illustrates that the low impact group recognises only try offline and buy online model. It can be explained by the fact that this group strongly relays on its physical stores. The high impact group prefers combined delivery with food (75%) and buy online and pick up offline model (75%). The first finding on the combined delivery can be linked to the importance of fast delivery, which is offered in food sector. The second finding on pick up offline was also discussed in literature by Cao. He notices that physical shops should be perceived as hubs linking online and offline channels. (Cao, 2014, p. 70). Laudon also argues that the ability of offline traditional firms of integration their web and mobile operations with their physical store operations is of a high importance as it leverages the value of physical stores. (Laudon, 2018, p. 597-609)

Strategies

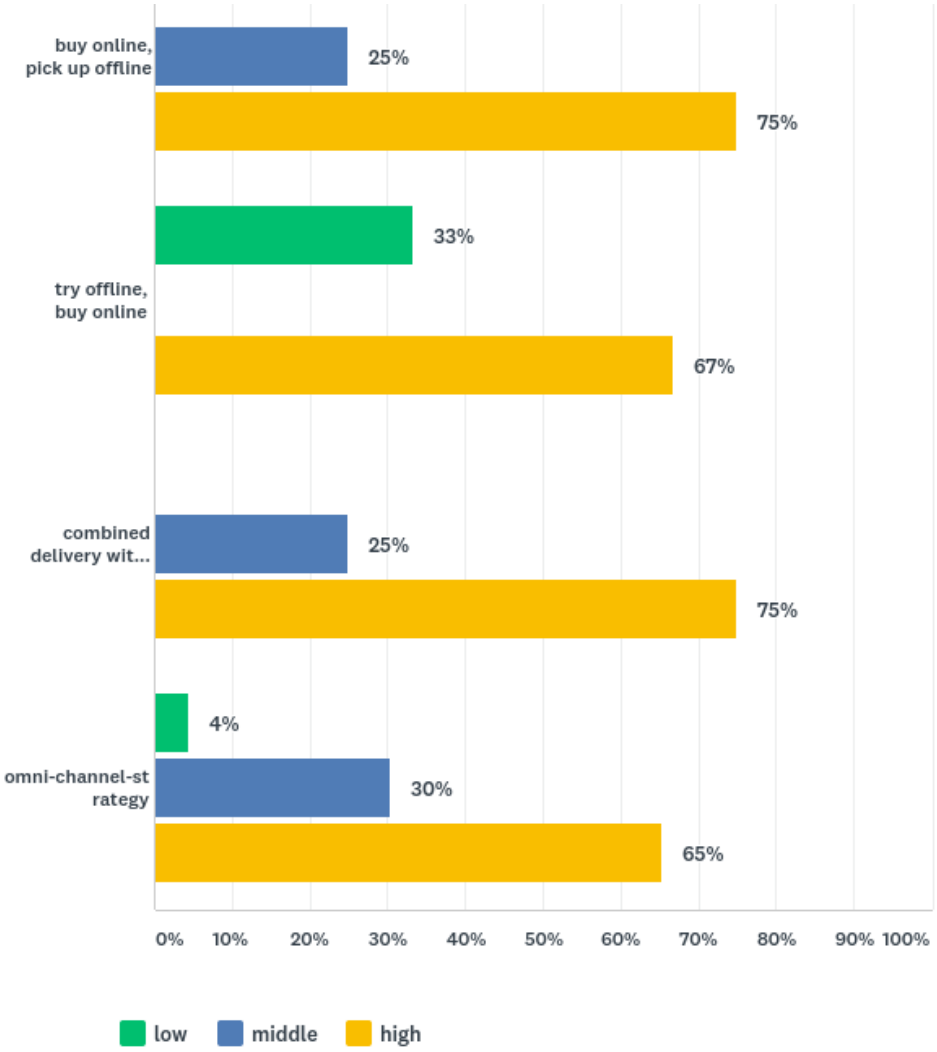


Figure 25: New business strategies

Finally, the implementation of new retail technologies has been analysed. The most popular one on aggregated results of all groups are chat-bot (61%) and the most unpopular one is voice commerce (30%). It is probably due to low level of advancement of voice technologies. Supposingly, the parameters might significantly change in two years owing to the dynamic development in this field. When investigating the answers within groups, one notices that chat-bot is the only technology which was selected by low impact group (7%). The most popular technology among the high impact group is argument reality (88%) and smart materials (80%). The results of the middle impact group do not show any major differences between mentioned technologies.

New retail technologies

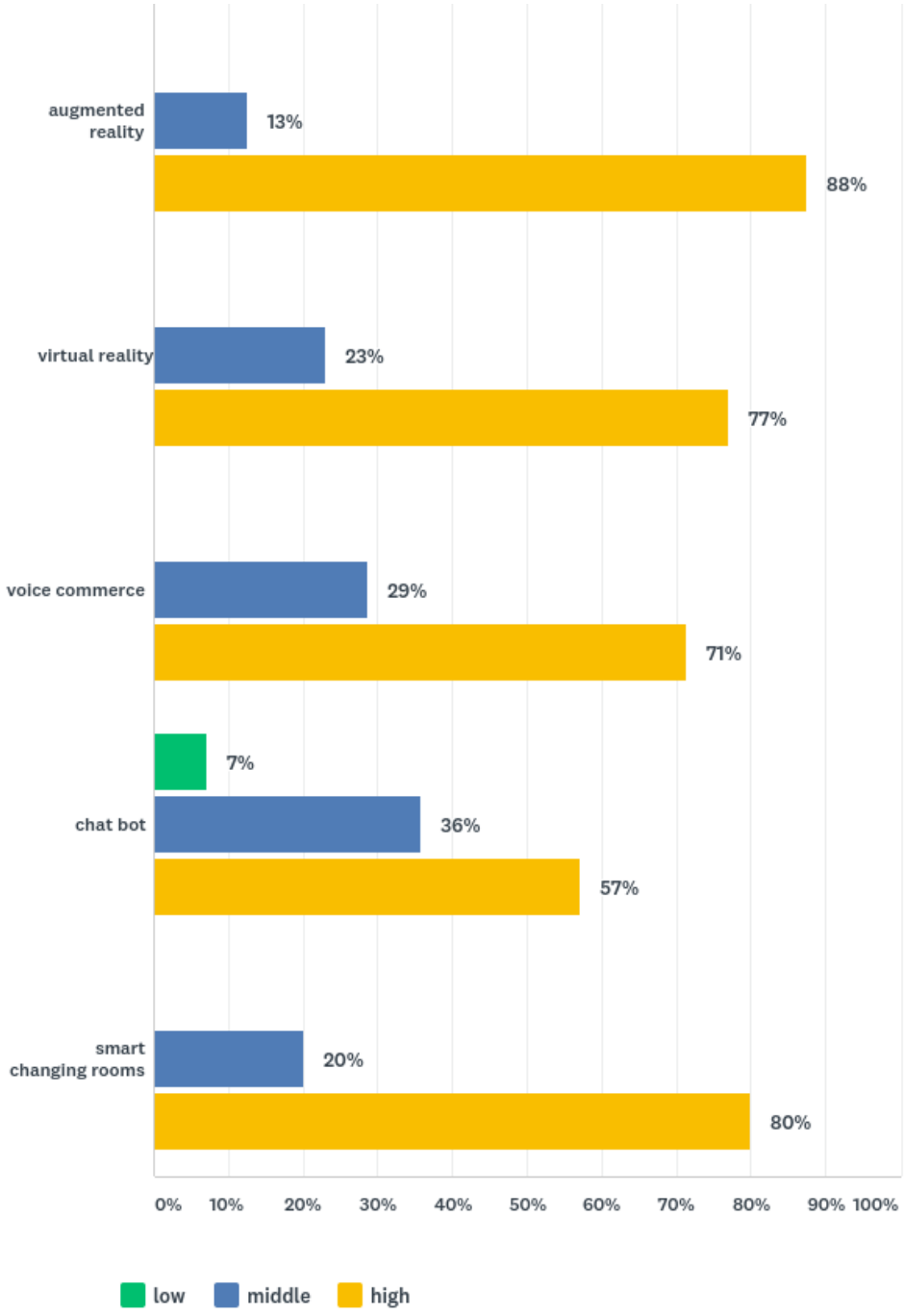


Figure 26: New retail technologies

5. Closing remarks

The results of this paper highlight the fast growth of e-commerce in the major German-speaking cities in Switzerland, in accordance with the global trends. The retailers are developing additional services , transforming store formats and redefining their business models in order to attract customers.

5.1. Summary

The impact of e-commerce on traditional retail has been confirmed. It is perceived however differently among various retailers regarding of their sectors, preferred location of stores, price segments as well as target groups. Firstly, retailers from jewellery and watches sector do not perceive big pressure of e-commerce, whereas clothing and sportswear sectors do. Secondly, the pressure has been noticed in all locations from shopping malls, train stations to city centres, but it has been declared weaker in city centres. Thirdly, it is perceived by the biggest number of retailers whose target group are adults and hardly perceived by those who sell goods to retired people. Finally, the high impact was declared by retailers positioned in low and middle price segment, while low impact was declared by the ones in high price segment.

According to the pressure of e-commerce retailers have different preferences and develop various business model in terms of real estate, customer experience and digitalisation strategies. However, in the aspect of real estate there are many similarities across all tree groups. They are all rather hesitant on weather to open a new store in the coming years. The type of a preferred store differs across the groups. Retailers perceiving low impact favour traditional store formats, while the high and middle impact group prefer pop-up stores and showrooms. The desired size of a pop-up store is between 10 and 80 sq m, and the preferred size of a showroom is 100-300 sq m. The factors taken into consideration by all groups when searching for a new location are mostly frequency of passers-by and connectivity by public transportation. The most important synergy effects with other uses are to be found in gastronomy.

In terms of logistic and storage surface there are no big differences between the groups. Most of the retailers outsource management of those surfaces. The interesting finding was that the stronger the impact of e-commerce, the shorter the delivery time.

Retailers declared different models in the field of customer experience depending on the pressure of e-commerce. The low impact group cares about high quality of service, like customising a product, whereas high impact group focuses on theme events, experience-oriented shopping and training programmes. Also in the aspect of supplementary services differences across the three groups were perceived. The low impact group mostly looks for synergy with gastronomy, when the high impact group shows interest also in pick-up points.

Finally, in terms of digitalisation strategies further differences across the groups were found. The overall satisfaction with digitalisation was mostly declared by the high impact group. There is a positive correlation between the level of satisfaction with digitalisation and willingness of introduction advanced cash-free payments. Not surprisingly, the high impact group also plans to offer finger print or mobile payments. In terms of new business strategies the majority of participants plans to develop the omni-channel-strategy. The low impact group chose for try offline, buy online, whereas high and middle impact group chose combined delivery with food and buy online, pickup offline strategy. In the field of new retail technologies the low impact shows less interest in technologies than the high and middle impact group.

5.2. Discussion

The goal of this paper was to evaluate the impact of e-commerce on retailers in the German-speaking swiss high streets. The main finding is that the pressure is perceived in Switzerland. However there are differences regarding the location of stores, price sectors and target groups.

Currently, retail in Switzerland can enjoy a very preferential conditions which are associated with following factors:

- forecasted population growth from 8.48 million people at the end of 2017 to 10.2 million people by the year 2045 (Bundesamt für Statistik BfS, 2018)
- low unemployment rate 2.55% (Bundesamt für Statistik BfS, 2018)

- high purchasing power of 40,456 euros per capita for Switzerland (Gesellschaft für Konsumforschung GfK, 2018)
- Switzerland being a popular destination for rich international tourists (CBRE, 2018)

The main concern is how retail is going to profit from those convenient conditions. Combining the stationary retail with online shopping should be considered in order to stimulate development. When analysing stationary retail, it is important to take into account that online sales which were purchased thanks to offline marketing and the physical activities. A new approach to stationary retail is recommended as it is a dynamic organism strongly connected with the online world. Finally, online sales should also be reflected in rent prices.

5.3. Prospect on further research

The limitations of this research are to be seen as guidelines for further studies.

Firstly, it would be interesting to investigate the impact of e-commerce from the consumers point of view as it would give a better understanding of customer experience.

Secondly, developing the research analysis with investigations in the French and Italian-speaking part of Switzerland would help verify if there are cultural biases in the retail sector.

Thirdly, due to the fact of being a very dynamic sector, retail should be perceived over a longer timeline. Different answers on new technologies are to be expected.

Finally, implementing structural interviews with retail manager in the country would help gather additional data on business strategies.

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Appendices

Appendix 1. Questionnaire

Strukturwandel im Detailhandel in Schweizer High Streets, Abschlussarbeit, Lehrgang 2018/2019, Universität Zürich CUREM

1. Wie schätzen Sie den Einfluss von Onlinehandel auf Ihrem Detailhandel?

   A. Niedrig

   B. Mittelmässig

   C. Hoch

ECKDATEN:

2. Ihr primärer Sektor (nur 1 Antwort):

   A. Kleidung

   B. Unterwäsche

   C. Schuhe und Taschen

   D. Sportbekleidung

   E. Schmuck und Uhren

   F. Brillen

   G. Elektronik

   H. Kosmetika

   I. Sonstiges (bitte angeben)

3. An welchen Standorten haben Sie mehrheitlich Ihre Shops?

   A. Shopping Malls

   B. Zentrale Lagen (Innenstädte)

   C. Bahnhöfe, Flughafen

   D. andere (Bitte schreiben Sie welche?)

nur bei 1b, 1c

4. Welche Plattform verwenden Sie für den Online Handel?

A. Zalando
B. Amazon
C. Galaxus
D. eigene
E. andere (Bitte schreiben Sie welche?)

5. Was ist Ihre primäre Alterskundengruppe? (nur 1 Antwort)

A. Kinder
B. Teenager
C. Erwachsene
D. Senioren

6. Was ist Ihre primäre Zielgruppe? (nur 1 Antwort)

A. nur Frauen
B. vor allem Frauen
C. nur Männer
D. vor allem Männer
E. beide Frauen und Männer

7. In welchem Preissegment sind Ihre Produkte mehrheitlich positioniert? (nur 1 Antwort)

A. tiefes Segment
B. mittleres Segment
C. hohes Segment

nur bei 1b, 1c

8. In welchem Bereich beeinflusst der Onlinehendel Ihr Geschäft?

A. Umsatzvolumen
B. Preis- und Margendruck
C. Sonstiges (Bitte schreiben Sie welche?)

PRÄFERENZEN HANDEL:

9. Planen Sie in den nächsten 2 Jahren mögliche stationäre Läden neu zu eröffnen?

   A. eher nein

   B. eher nein

nur bei 9c, 9d

10. Weshalb planen Sie in den nächsten 2 Jahren keine neuen stationären Läden zu eröffnen?

   A. steigende Miete

   B. sinkende Umsätze

   C. Wir möchten die Branche wechseln

   D. andere (Bitte schreiben Sie welche?)

nur bei 9a, 9b

10. Was für eine Fläche für Ihre neuen Standorte würden Sie suchen?

   A. Wir bleiben bei traditionellen stationären Shops

   B. Pop-up-Store (ein kurzfristiges und provisorisches Einzelhandelsgeschäft, das vorübergehend in leerstehenden

   C. Showroom (ein langfristiges und großräumiges Einzelhandelsgeschäft, wo man Produkte ausstellen kann)

   D. andere (Bitte schreiben Sie welche?)

nur bei 11b

11. Was für minimale Anforderungen an Fläche von Pop-up-Stores haben Sie ?

   A. weniger als 10 m2

   B. 10-80 m2

   C. mehr als 80 m2

nur bei 11c

11. Was für minimale Anforderungen an Fläche von Showrooms haben Sie ?

   A. weniger als 100 m2

   B. 100- 300 m2

   C. mehr als 300 m2

12. Welche Faktoren spielen für Sie eine wichtige Rolle bei der Standortauswahl?

   A. Flexibilität der Nutzung

B. Sichtbarkeit eines Shops
C. Erreichbarkeit mit ÖV
D. Erreichbarkeit mit dem Auto oder anderen individuellen Verkehrsmitteln
E. Passantenfrequenz
F. Nähe der Logistikzentren
G. Grösse des Ladenlokals
H. Grosses Einzugsgebiet
I. Bodenpreis/Mietpreis
J. andere (Bitte schreiben Sie welche?)

13. Welche Mischnutzungskonzepte im gleichen Gebäude bevorzugen Sie ?

A. Kindertagesstätten
B. Hotels
C. Büros / Co-Working
D. Gastronomie
E. keine (z.B. für Flagship Stores)
F. andere (Bitte schreiben Sie welche?)

14. Welche Synergieeffekte mit anderen Dienstleistungen in der Nähe bevorzugen Sie?

A. Verpflegung/Restaurants
B. Bars
C. Kulturdestinationen
D. Wellnessdestinationen
E. Entertainment (Kino, Theater)
F. Aus- und Weiterbildung
G. andere (Bitte schreiben Sie welche?)

PRÄFERENZEN LAGER- UND LIEFERFLÄCHEN:

15. Welche (neuen) Lieferleistungen möchten Sie anbieten?

    A. 24-Std.-Abholstationen
    B. “at your spot” Kurier-Service am Bahnhof, Flughafen
    C. Drohnen zu Paketauslieferung
    D. keine
    E. andere (Bitte schreiben Sie welche?)

16. Was für minimale Anforderungen an Lager- und Lieferflächen haben Sie?

    A. 2-50 m2
    B. 50-100 m2
    C. mehr als 100m2

17. Wie bewirtschaften Sie Ihre Logistikfläche?

    A. selbst
    B. `shared economy` (mit anderen Einzelhändlern)
    C. mit Hilfe professioneller Unternehmen (out sourced)
    D. andere (Bitte schreiben Sie welche?)

KUNDENERLEBNIS:

18. Welche Lieferzeiten nach Hause können Sie Ihren Kunden anbieten?

    A. innerhalb 2 Stunden
    B. am gleichen Tag (innerhalb 24 Stunden)
    C. am nächsten Tag (1 Tag)
    D. am übernächsten Tag (2 Tage)
    E. keine Liefeung nach Hause
    F. andere (Bitte schreiben Sie welche?)

19. Welche Geschäftsmodelle verfolgen Sie am meisten?

    A. erlebnisorientiertes Shopping
    B. persönliche Beratung (Styling – Beratung, Fitness – Beratung)
    C. hohe Servicequalität (z.B. Anpassung gekaufter Produkte vor Ort)
    D. Marken unter einem Motto verkaufen

20. Welche ergänzenden Dienstleistungen möchten Sie integrieren ?

A. Verpflegung

B. Beratung und Training

C. Abholstationen

D. Events (Workshops, Treffen mit einem Experten, Ausstellungen)

E. keine

F. andere (Bitte schreiben Sie welche?)

DIGITALISIERUNGSTRATEGIEN:

21. Sind sie mit der Digitalisierung (Kauf, Lager, Logistik, Zwischenlager, Display, Verkauf, Lieferung, Zahlung) von Ihrem Geschäft zufrieden?

A. ja

B. eher ja

C. eher nein

D. nein

22. Haben Sie vor (bzw. haben Sie bereits), Cashfree-Zahlungen mit Mobiltelefon/Tablet/Smartwatch, Fingerabdruck, Gesichtsscan in den nächsten 2 Jahren einzubeziehen?

A. ja

B. eher ja

C. eher nein

D. nein

23. Welche Strategien planen Sie in der Zukunft zu verfolgen?

A. `buy online, pick up offline`

B. `try online, buy offline`

C. gemeinsamen Lieferdienst mit Nahrungsmittellieferungen anbieten

D. an den Betrieb angepasste Omni-Channel-Strategie

E. andere (Bitte schreiben Sie welche?)

24. Welche Retail Technologien planen Sie einzusetzen ?

A. Augmented Reality

B. Virtual Reality: ein Virtuelles 360 Grad Shopping Erlebnis, wo Kunden sich virtuell im Geschäft bewegen und Modekollektion einkaufen können

C. Smarte Umkleidekabine mit interaktivem Spiegel (Der intuitiv bedienbare Spiegel begleitet die Kunden in der Umkleidekabine durch ihren Customer Journey)

D. Voice Commerce

E. Chat Bot

Dankeschön!

Appendix 2. Raw data from the questionnaire

https://drive.google.com/file/d/1yvtg-cbhwG4BXyLY9OV8GZwJ8rd-u-d-/view?usp=drive_web

Appendix 3. Conversion text values to numeric values and T-test

https://drive.google.com/file/d/1Sy7lJoU2KeFbMxgw3u-3MrvsG_5snRkU/view?usp=drive_web

Declaration of Authorship

I hereby confirm that I have written the presented thesis on the Topic `E-commerce in the retail sector. The impact of e-commerce on retail sector in Swiss High Streets from the retailers perspective` without any further auxiliary means than the ones cited in this thesis. Every part of this thesis has been cited literally or analogously and has been clearly indicated in every single case through the indication of its source (including secondary literature).

This thesis has not been presented in this or any similar form to other examination committee and has not been published yet.

Zurich, 31.08.2019

Ania Walewska