



## 7<sup>th</sup> eCommerce Survey : September 2010

# MCA eCommerce Survey 7

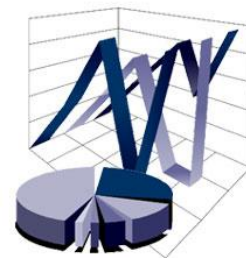
- ❑ MCA commissioned Informa to carry out its 7<sup>th</sup> e-Commerce survey.
- ❑ Previous surveys on Internet and eCommerce usage were held in Sept 06, April 07, Sept 07, Apr 08, Sept'08 and Sept'09.



## A i m

To obtain an indication of the level of eCommerce use across Malta and Gozo and its potential for growth.

To compare results across surveys so as to identify trends and changes in buying behaviour patterns.





Telephone interviews (CATI)  
26 close-ended questions



A stratified sample of 1600 respondents  
At least 400 e-Commerce users



Data classified according to:  
*Gender*  
*Age*  
*Education*  
*Occupation*  
*Area*

# Sample Structure

## Gender

|              |                    |
|--------------|--------------------|
| <b>Total</b> | <b>1600 (100%)</b> |
| Male         | 764 (47.8%)        |
| Female       | 836 (52.3%)        |

## Age

|              |                      |
|--------------|----------------------|
| <b>Total</b> | <b>1598 (100.0%)</b> |
| 18 – 29      | 334 (20.9%)          |
| 30 – 39      | 265 (16.6%)          |
| 40 – 49      | 274 (17.1%)          |
| 50 – 65      | 452 (28.3%)          |
| 66 +         | 273 (17.1%)          |

## Area

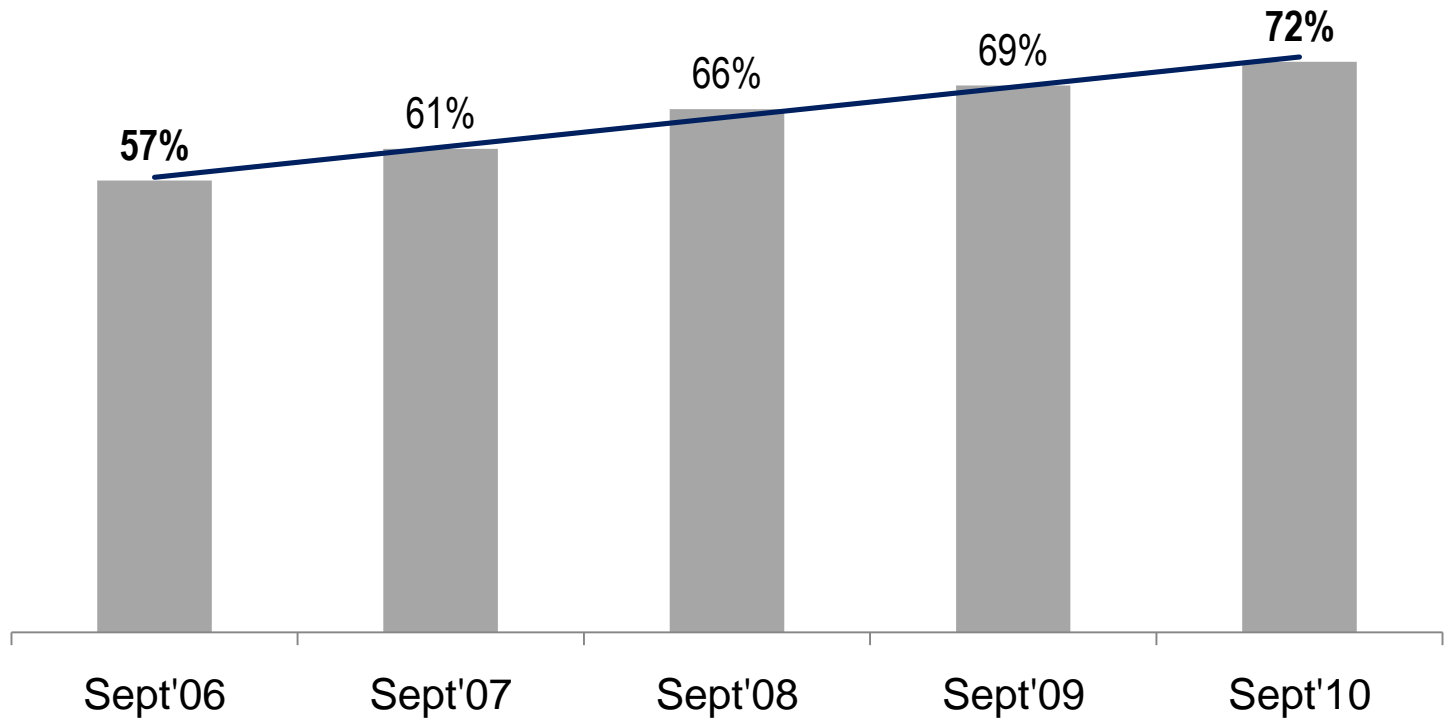
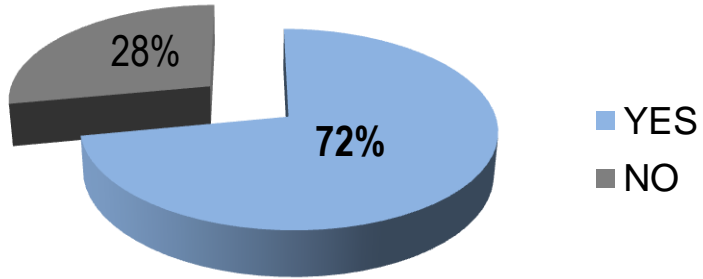
|              |                    |
|--------------|--------------------|
| <b>Total</b> | <b>1600 (100%)</b> |
| Centre       | 463 (28.9%)        |
| North        | 239 (14.9%)        |
| South        | 197 (12.3%)        |
| East         | 296 (18.5%)        |
| West         | 306 (19.1%)        |
| Gozo         | 99 (6.2%)          |

# Survey Results



# Internet Access

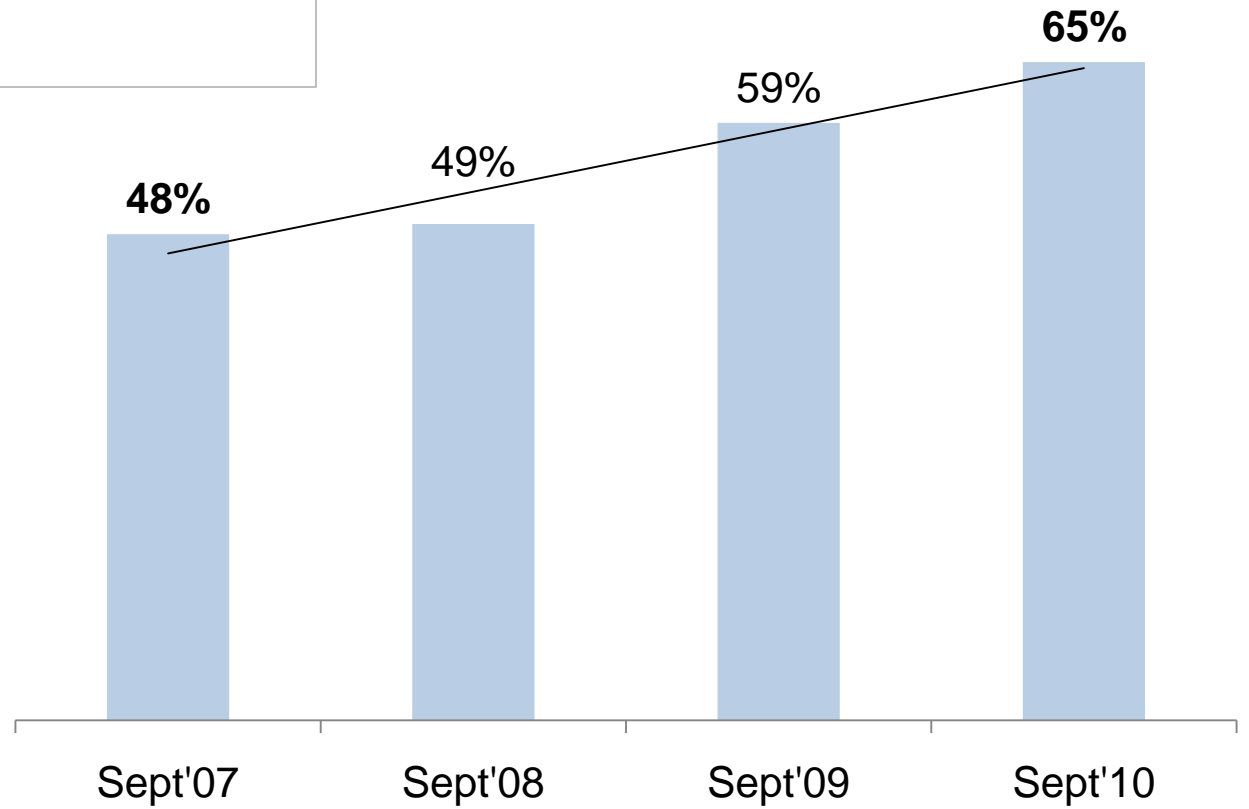
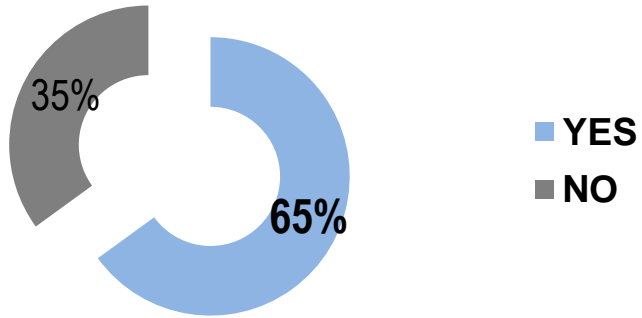
Sept'10



Base: All respondents

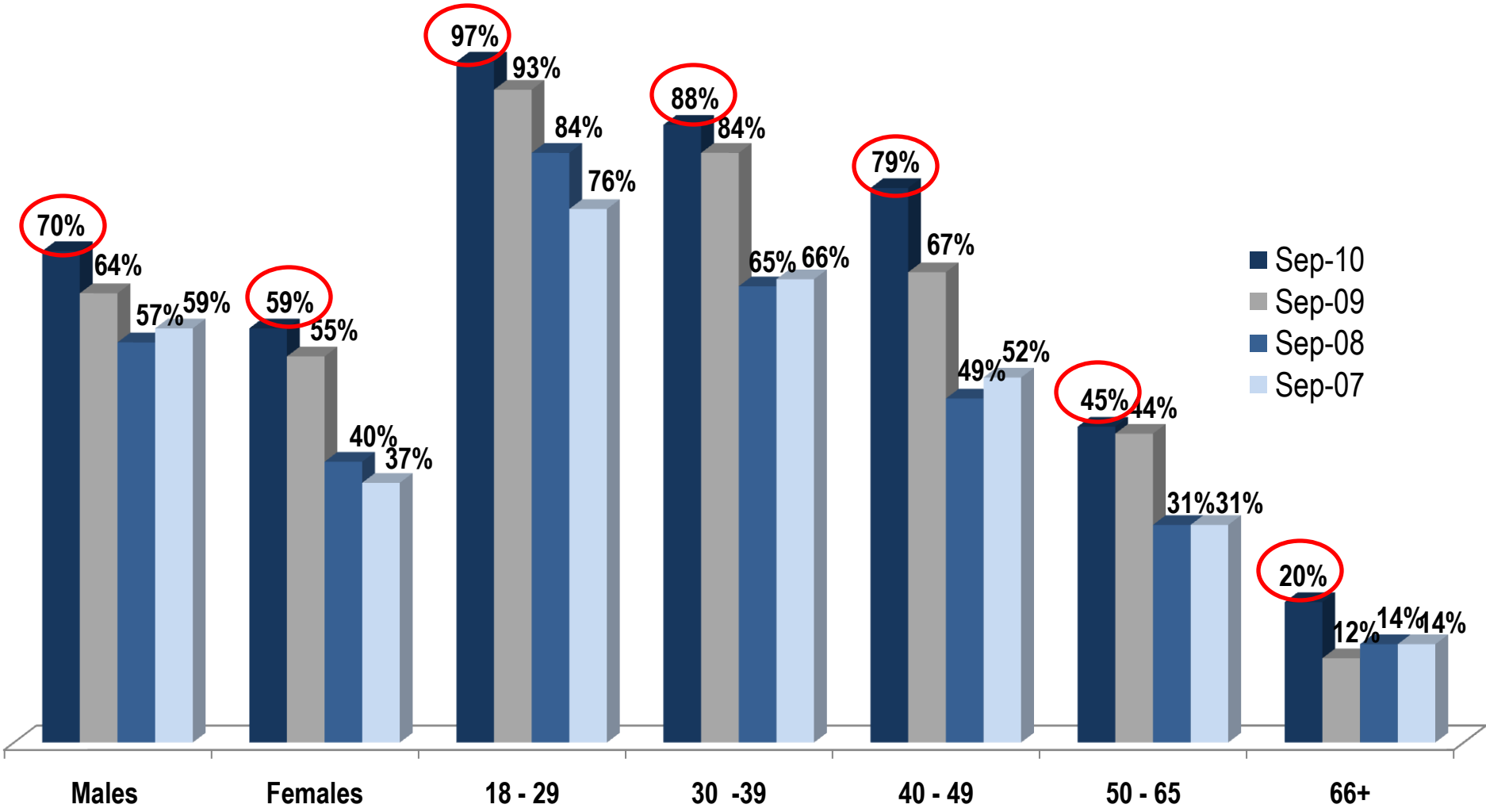
# Internet Usage

## Sept'10



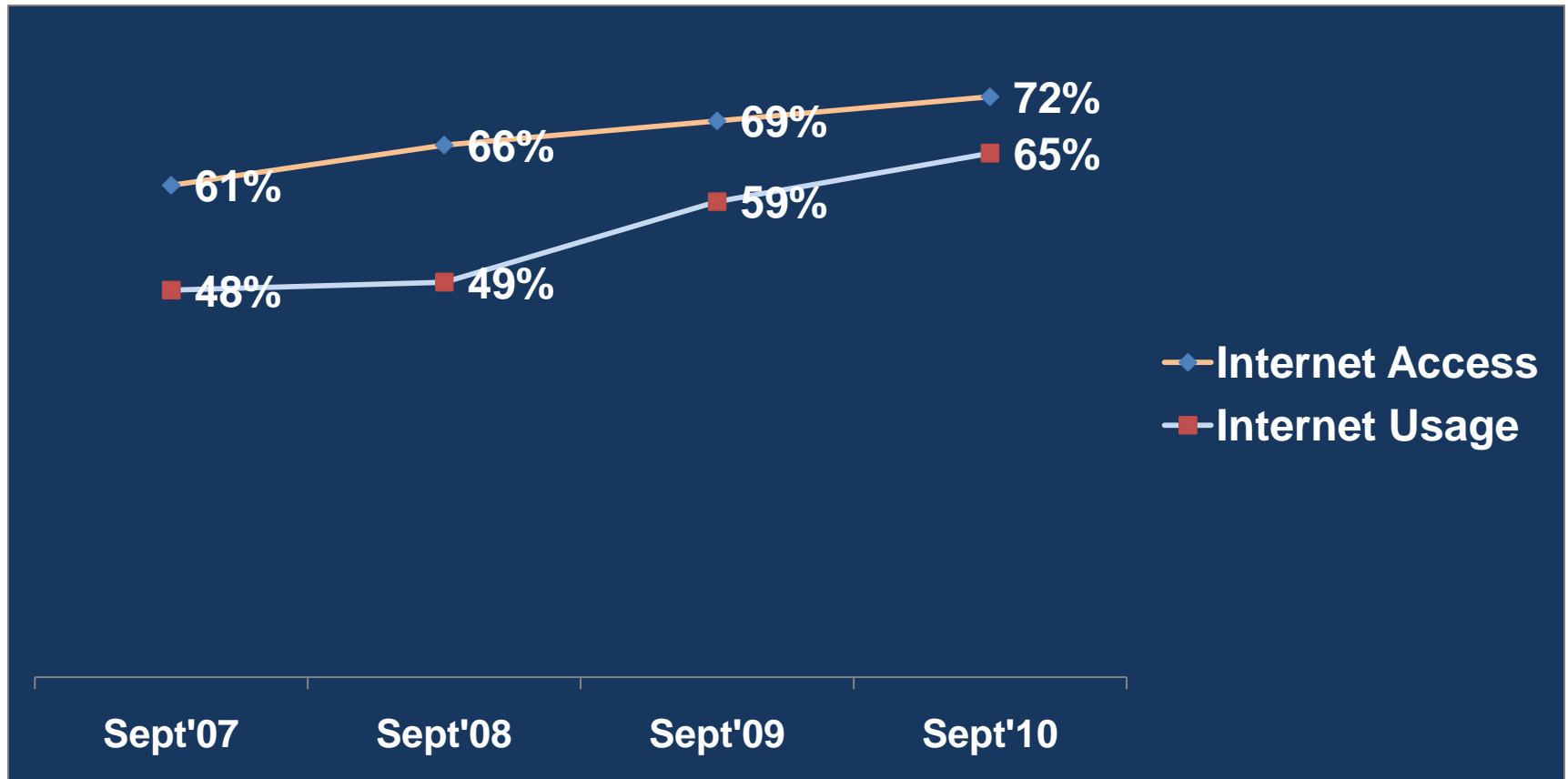
Base: All respondents

# Internet Usage by Demographic Variables



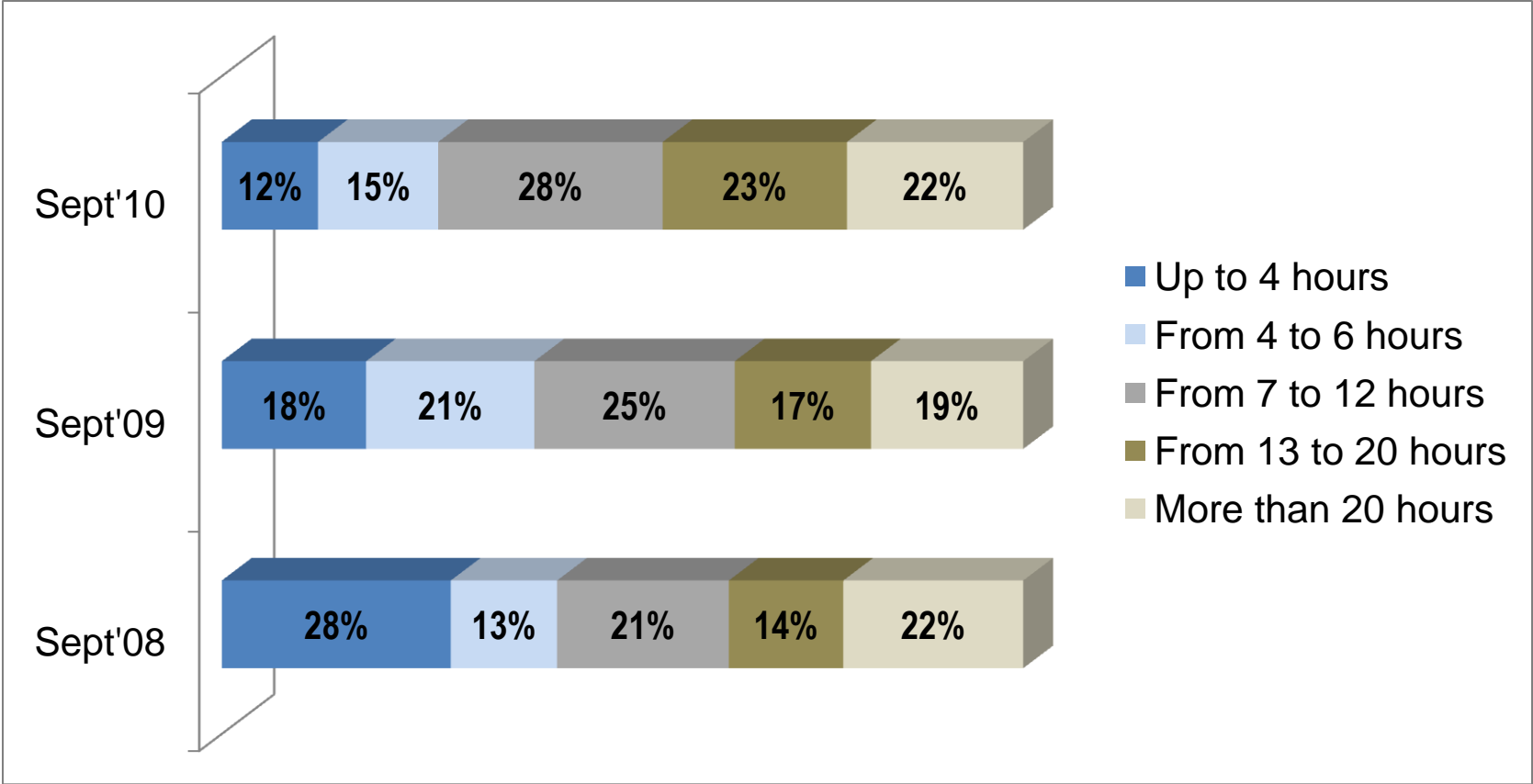
Base - All respondents

# Internet Access vs. Internet Usage

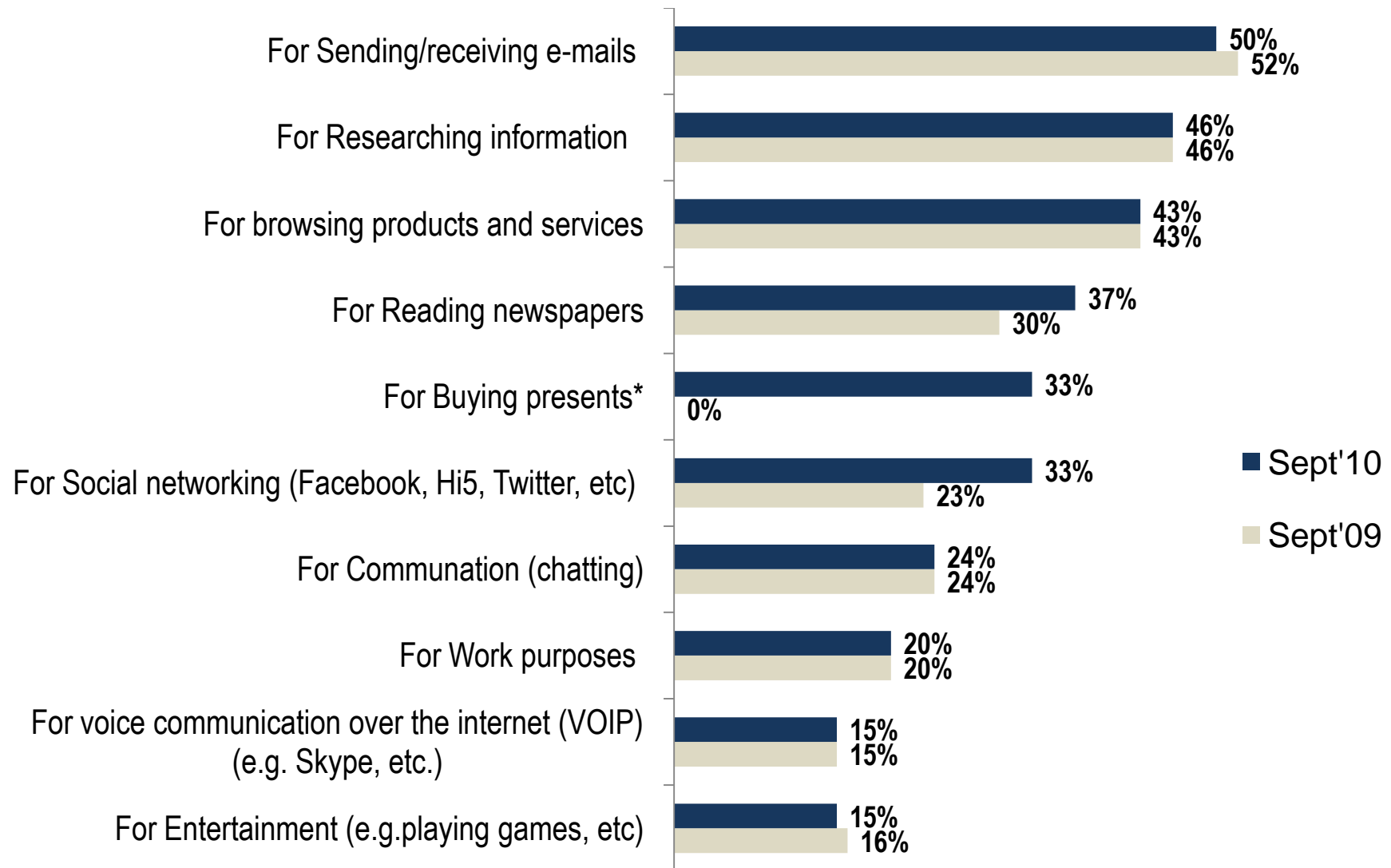


Base: All respondents

# Time Spent Using the Internet/Week



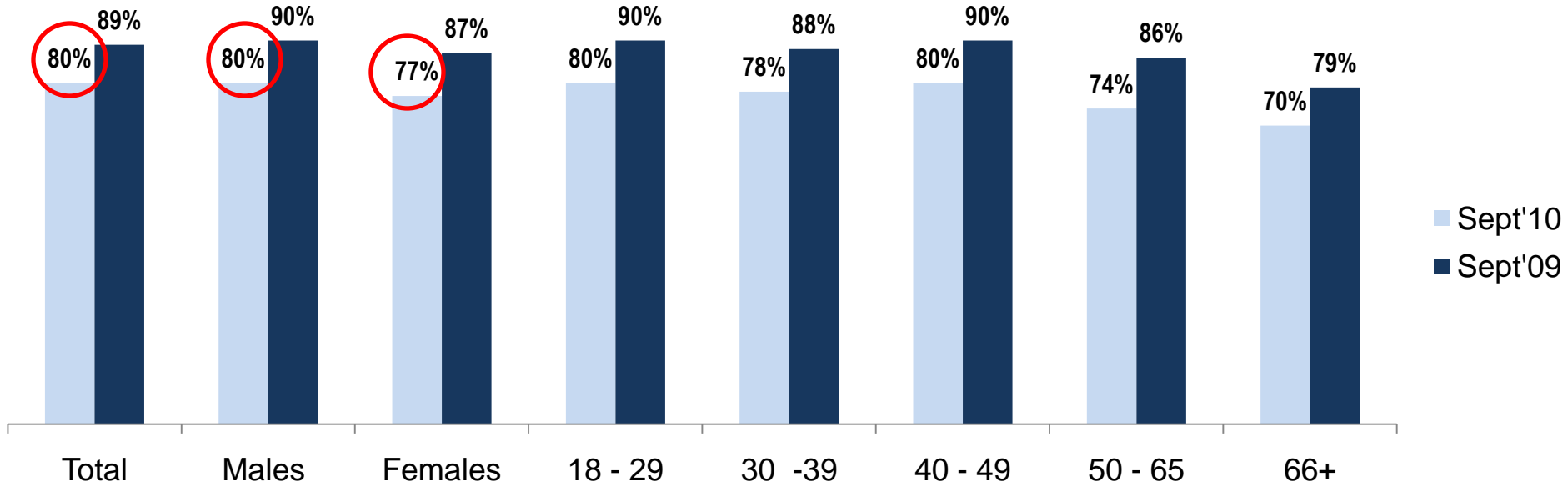
# Reasons For Using the Internet



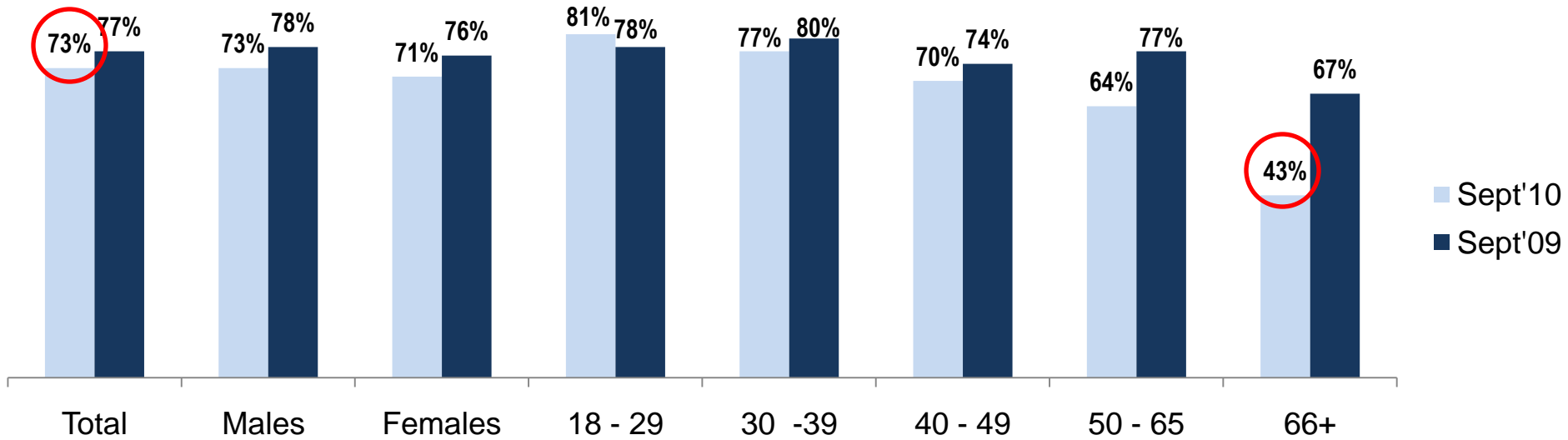
\*added this year

Base: All respondents

## Sending/Receiving eMails

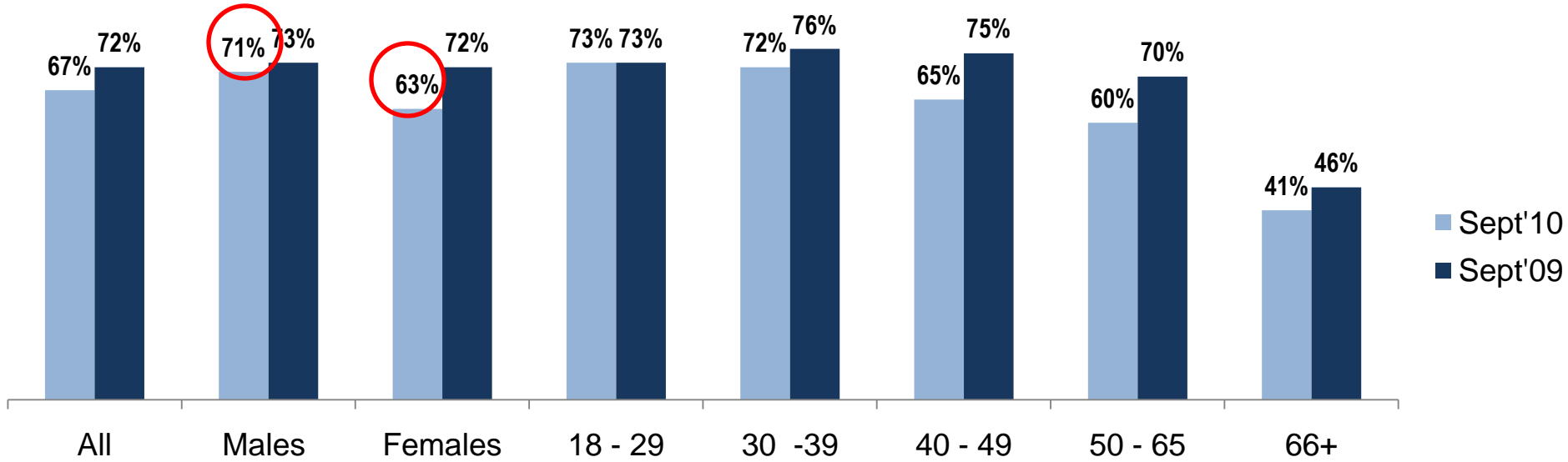


## Researching Information

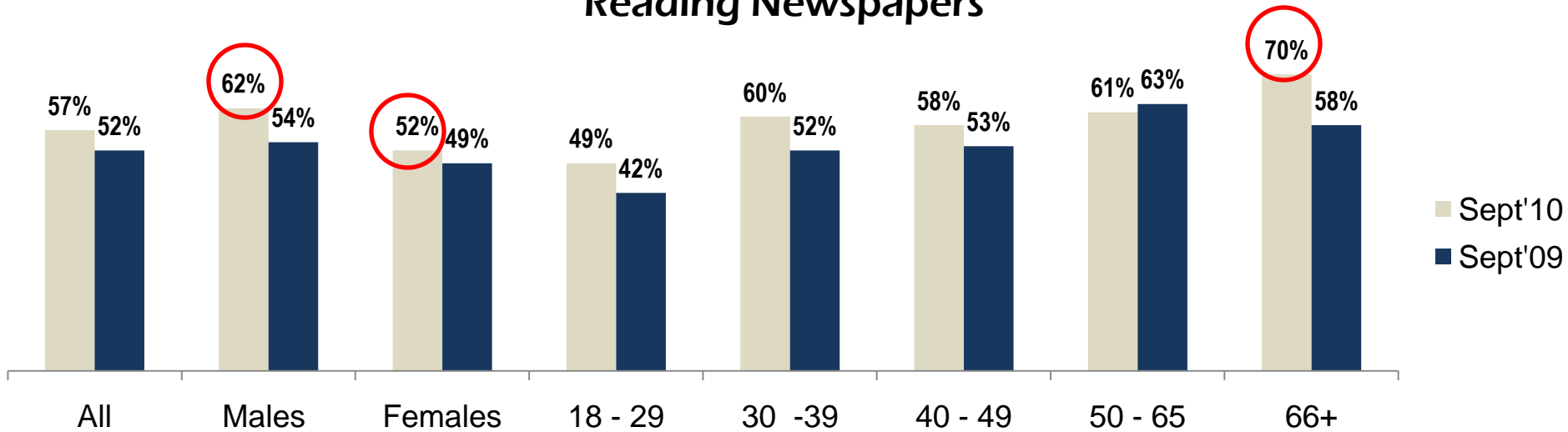


Base: Internet Users

## Browsing for Products and Services

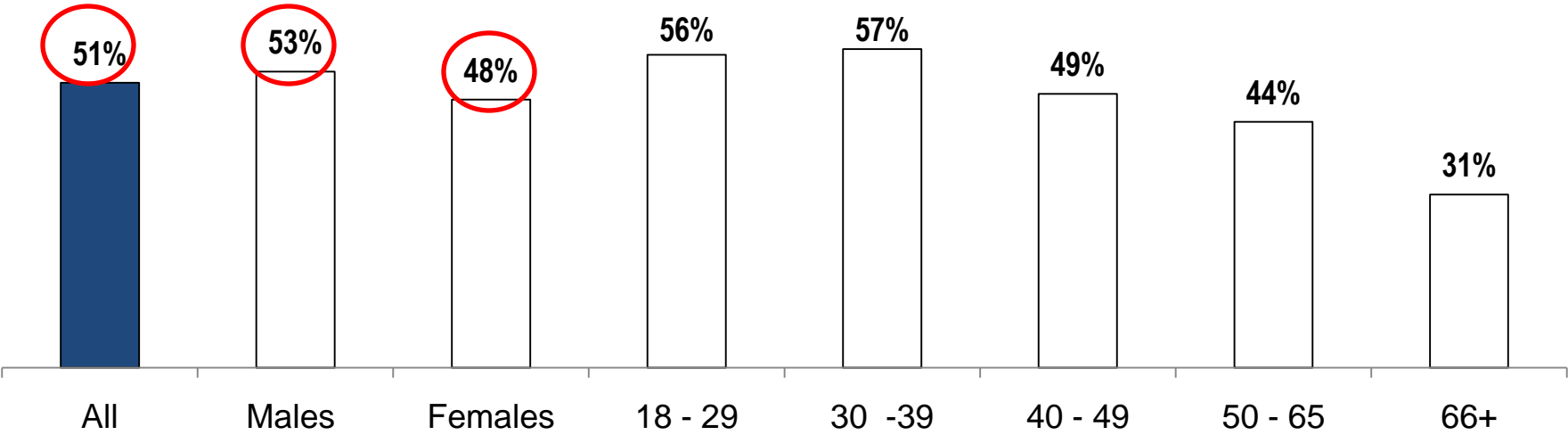


## Reading Newspapers

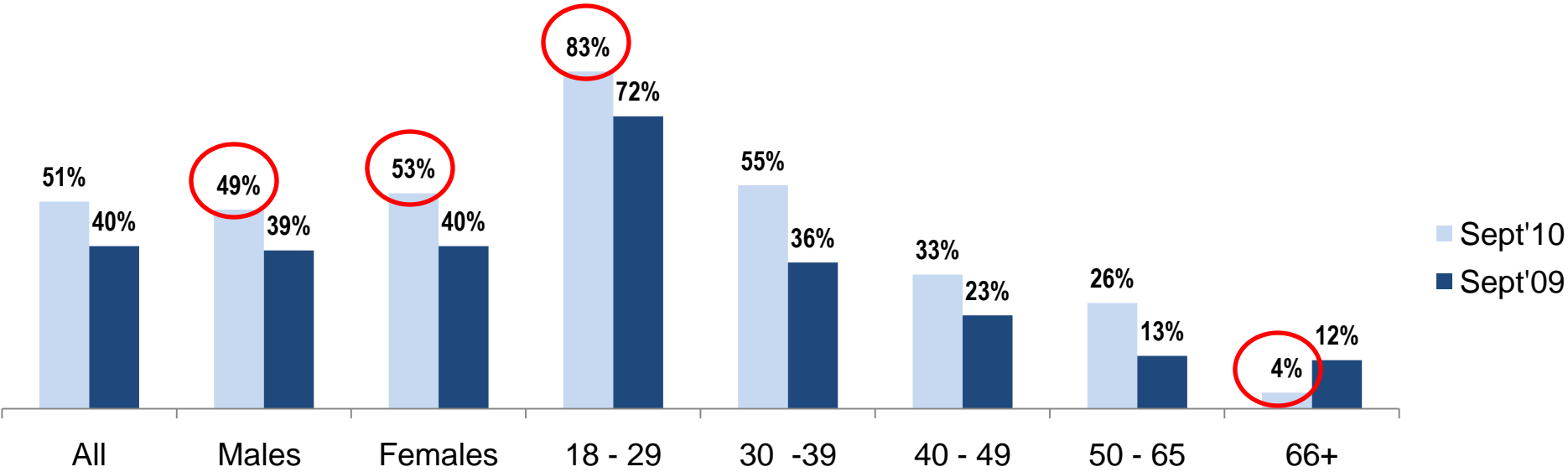


Base: Internet Users

# Buying Presents

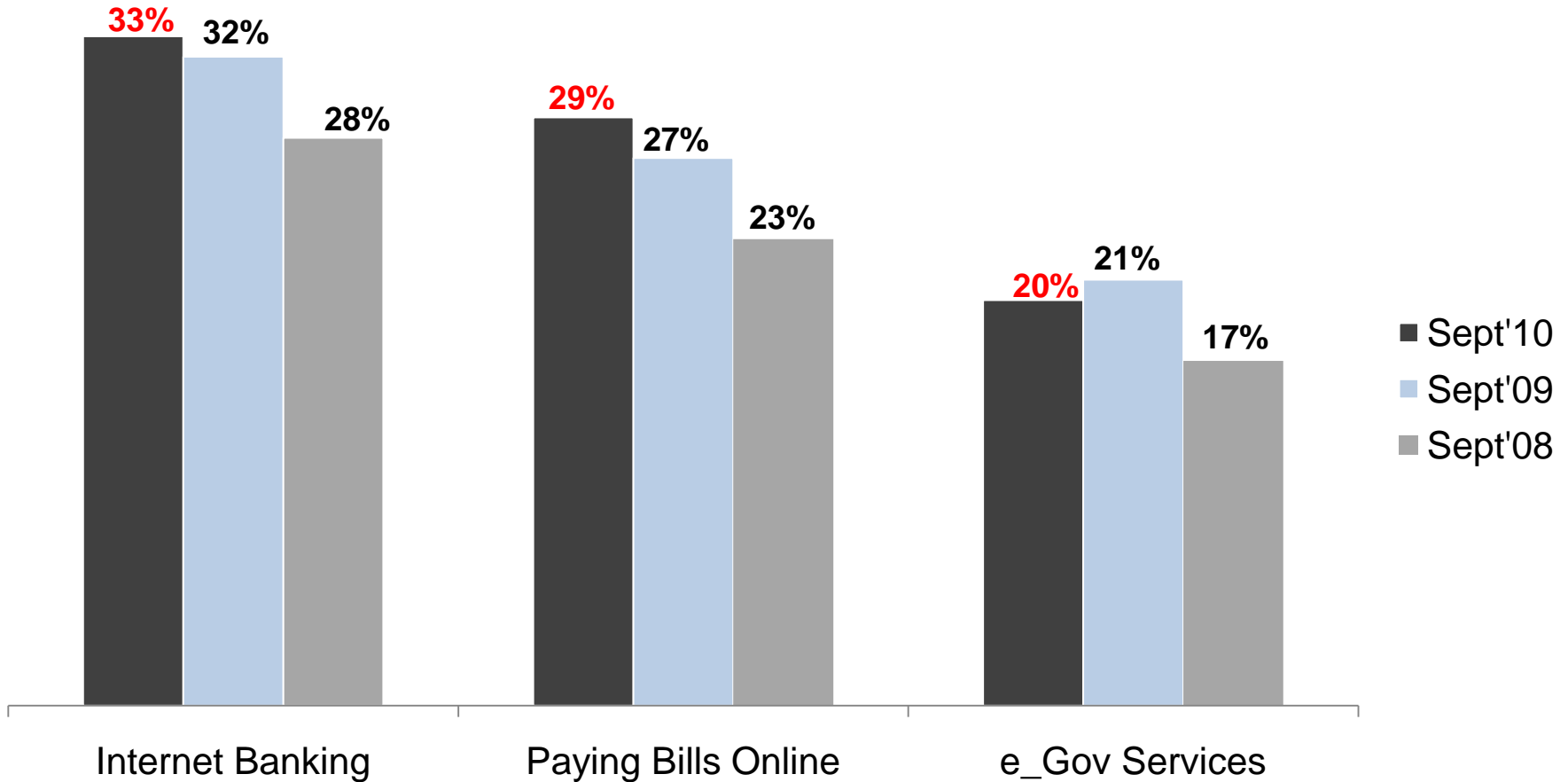


# Social Networking (Facebook, Hi5, Twitter)



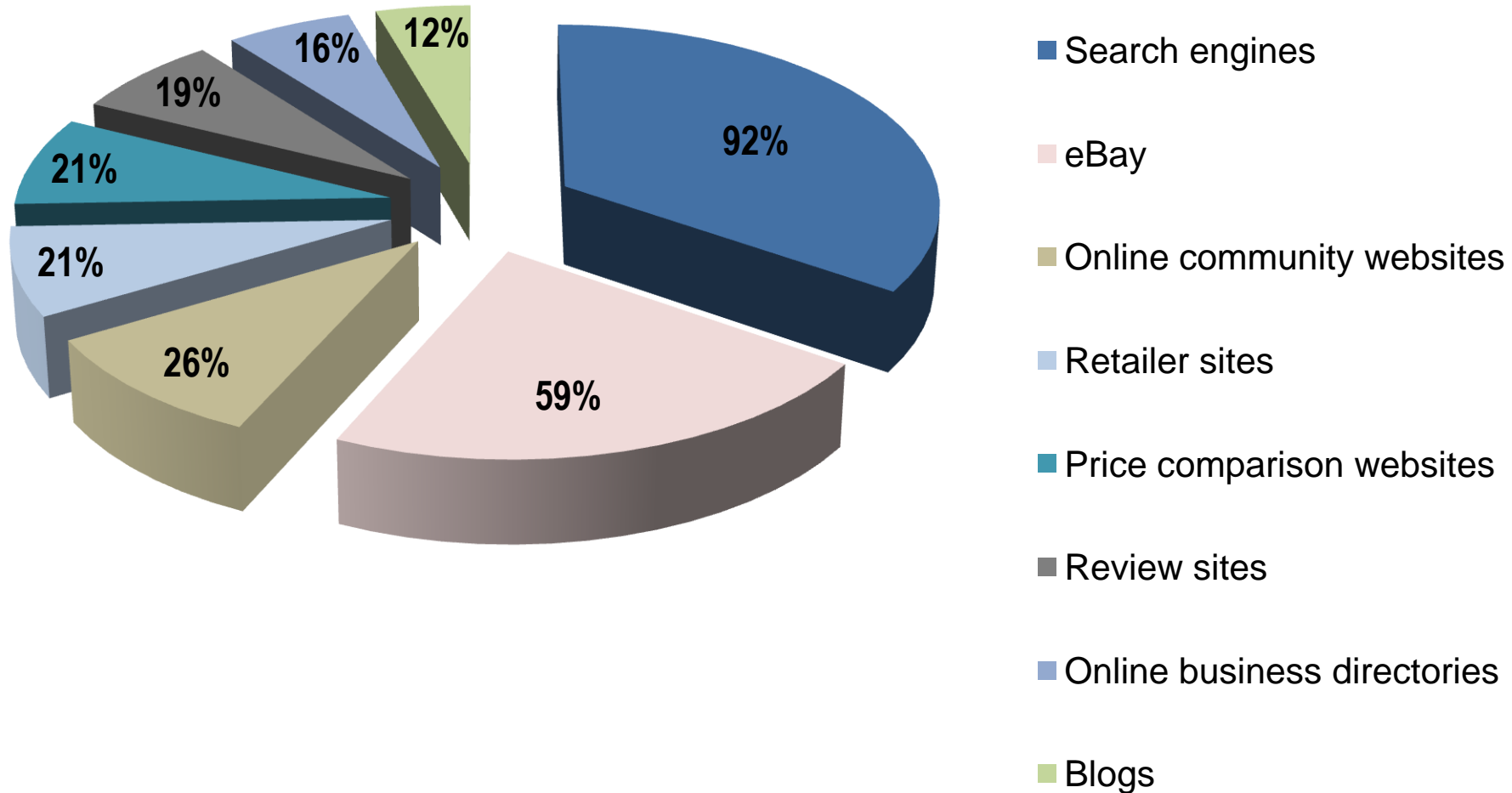
Base: Internet Users

# Internet Banking, Online Payments & e- Gov Services



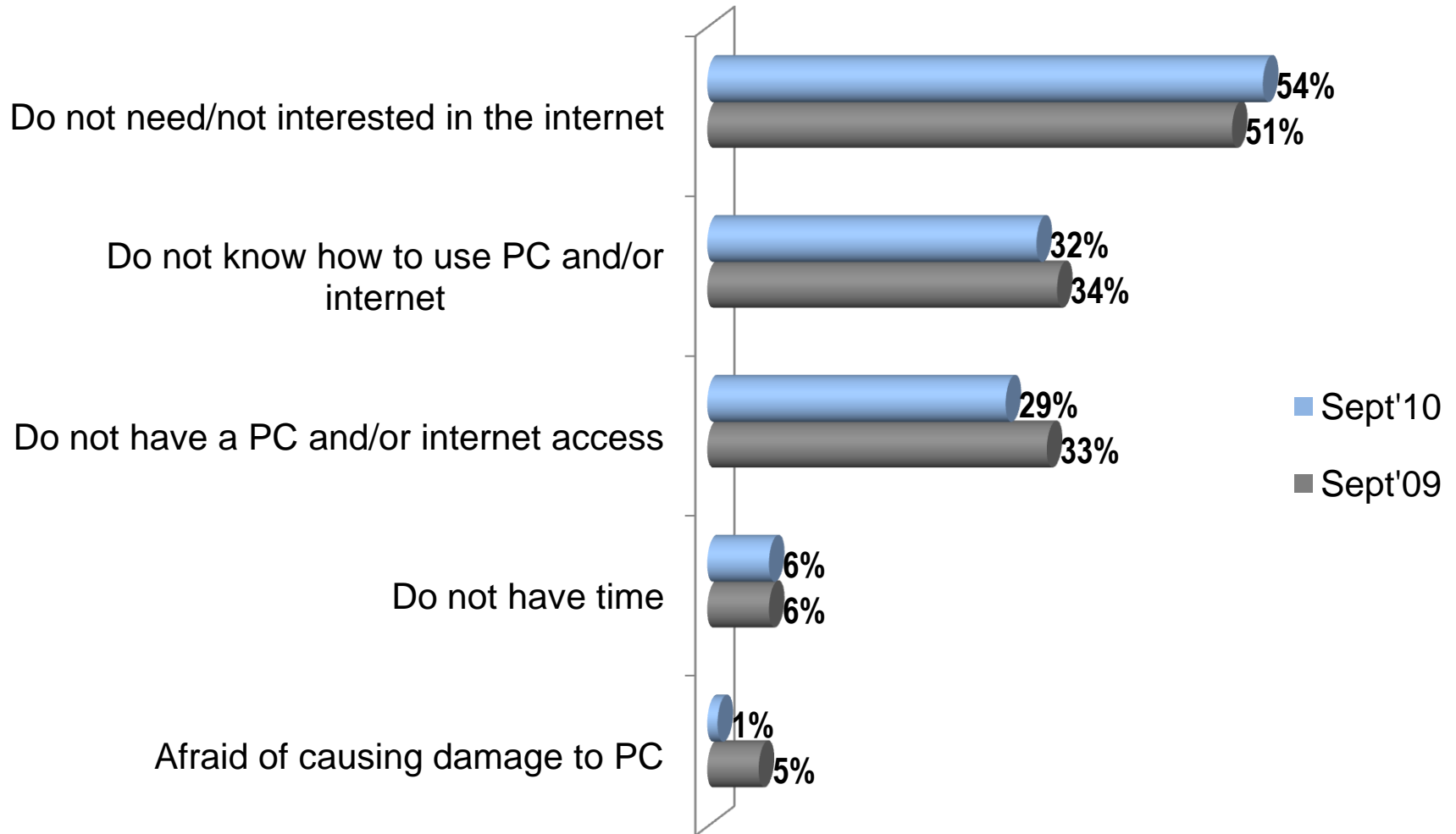
Base: All respondents

# Looking for Information on the Internet

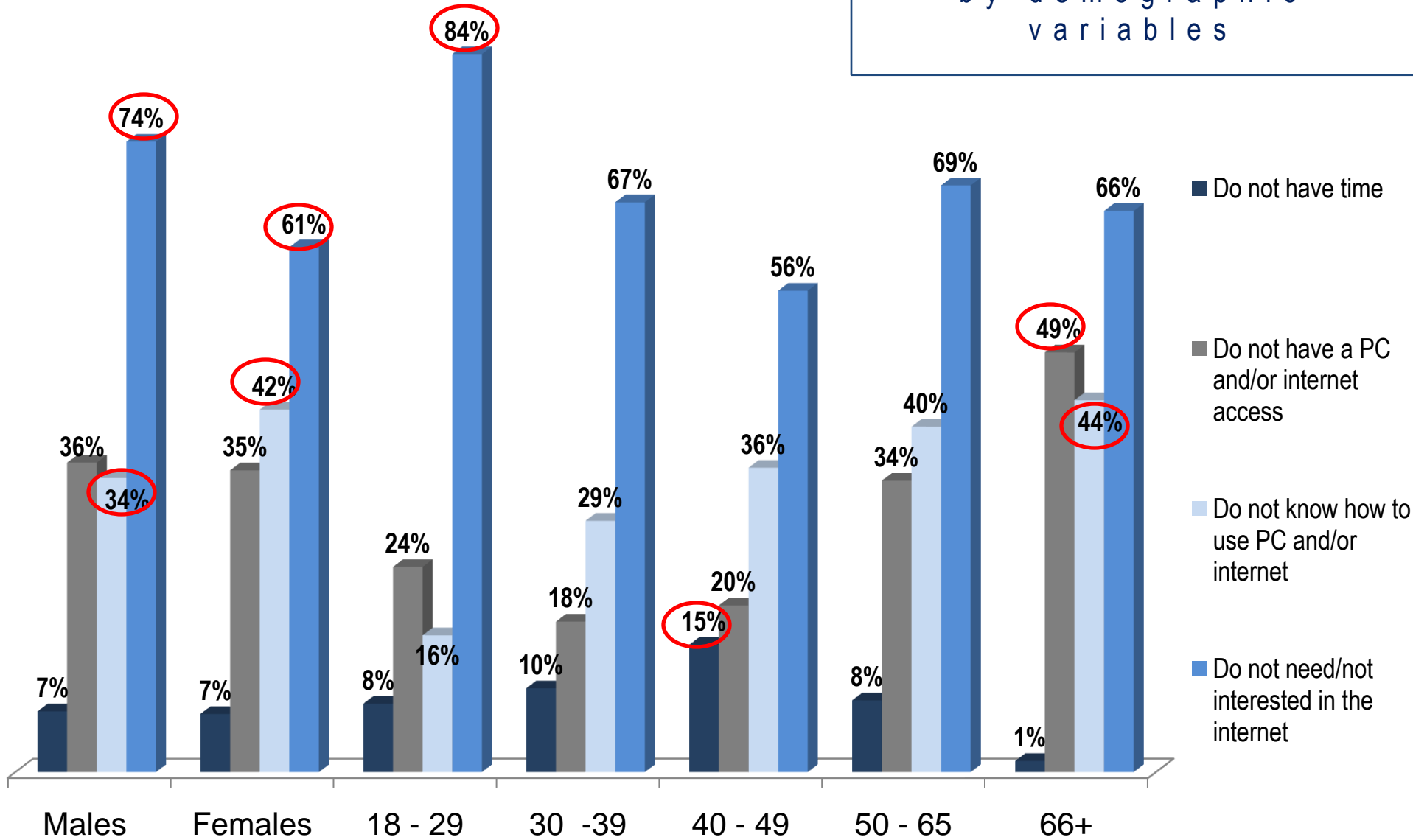


Base: Internet Users

# Reasons For Not Using the Internet

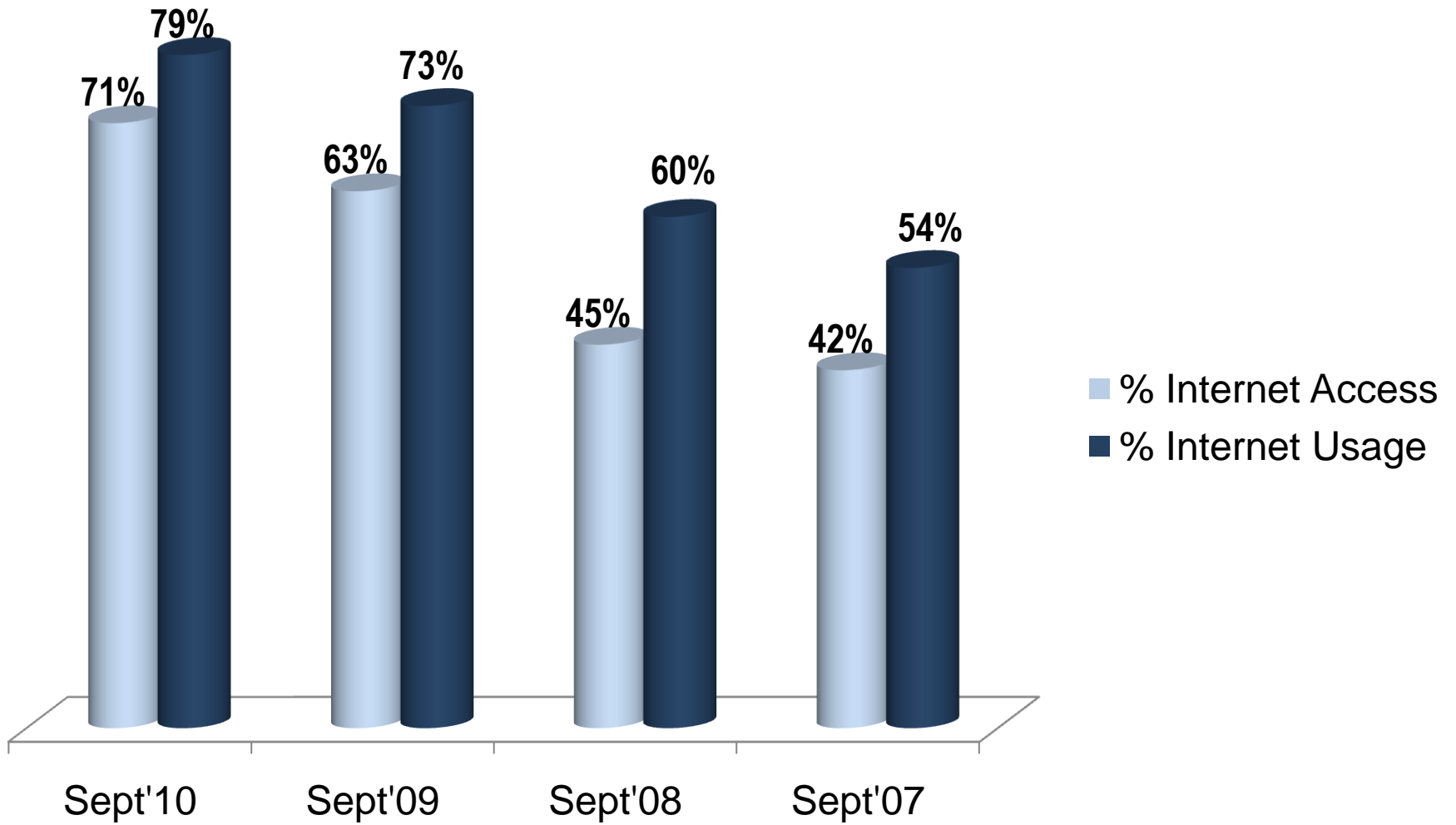


# Reasons For Not Using the Internet - by demographic variables

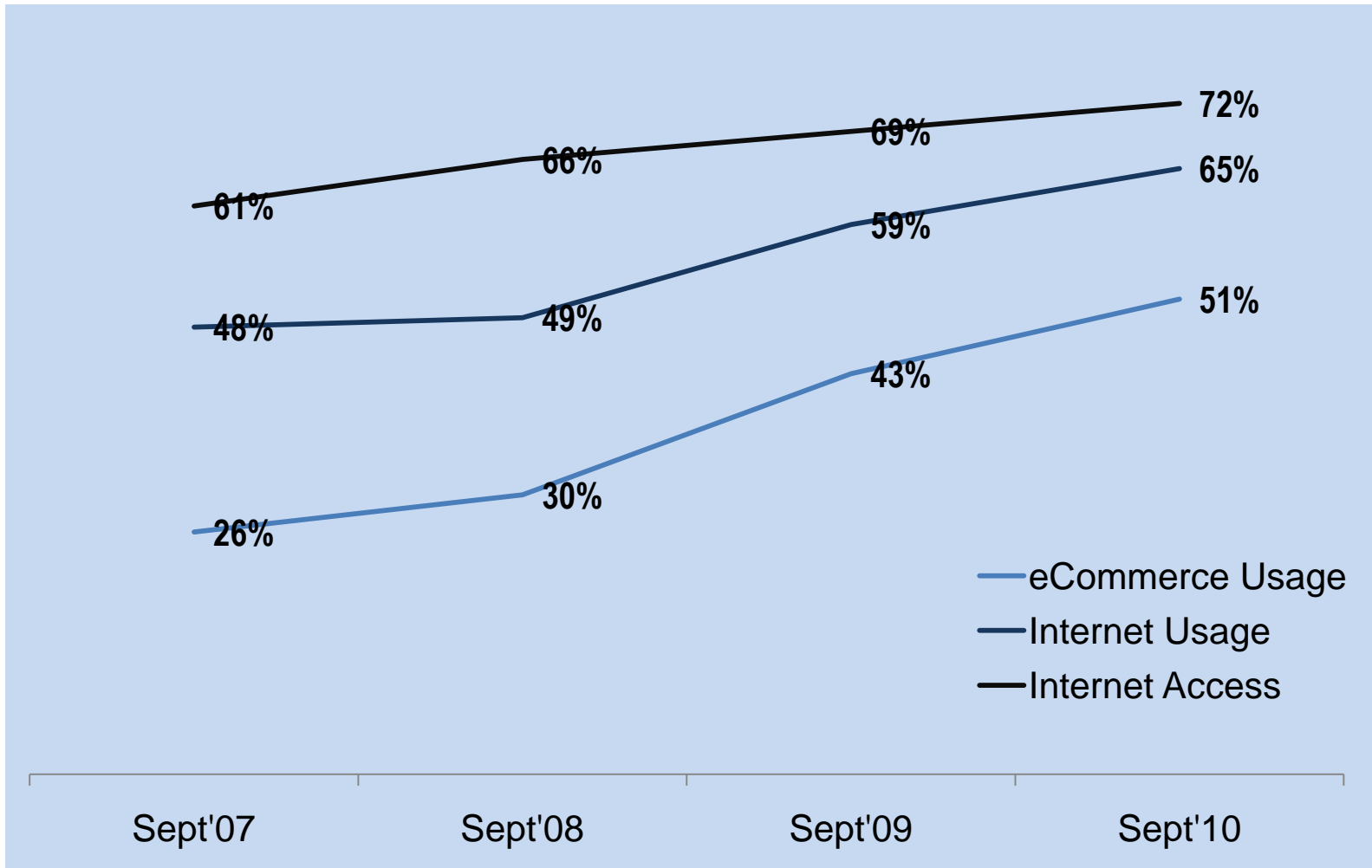


Base: Non- Internet Users

# eCommerce Usage

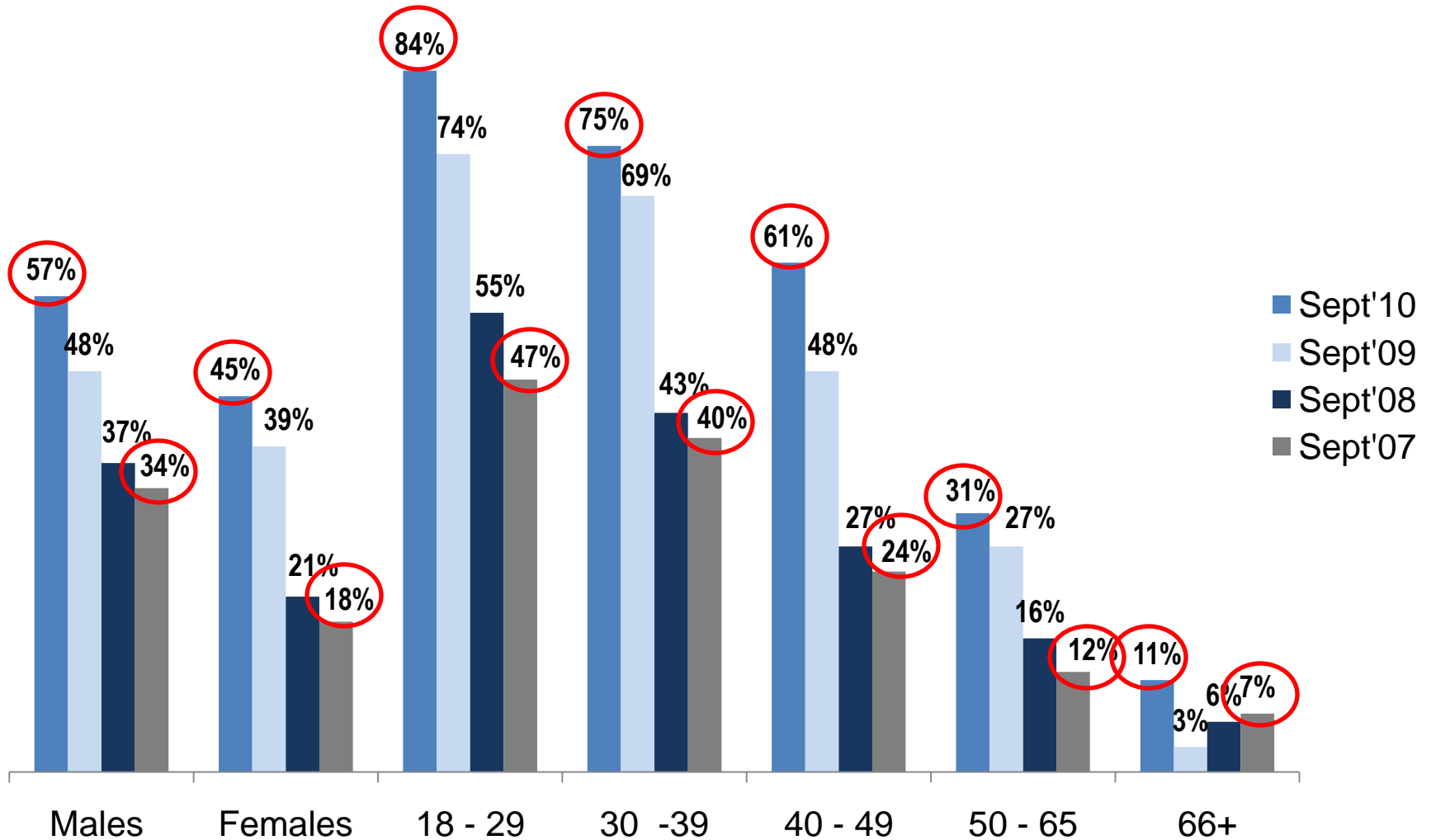


Internet Access  
Internet Usage  
eCommerce Usage



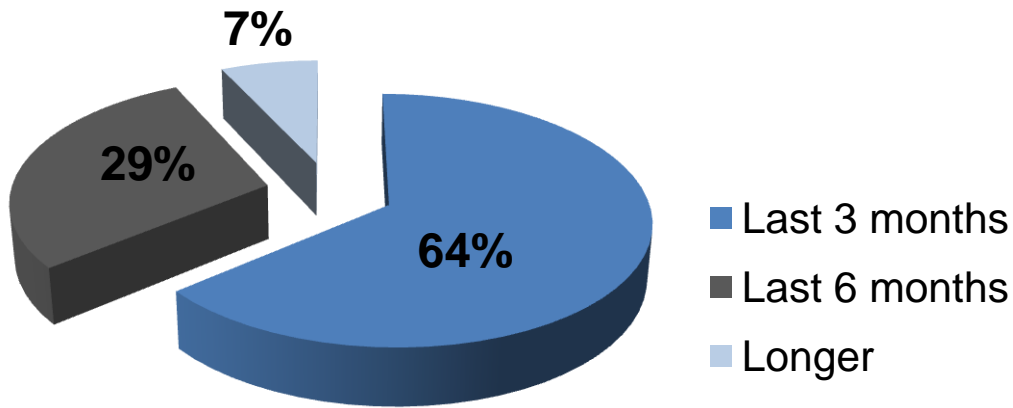
Base - All respondents

# eCommerce Usage by Demographic Variables

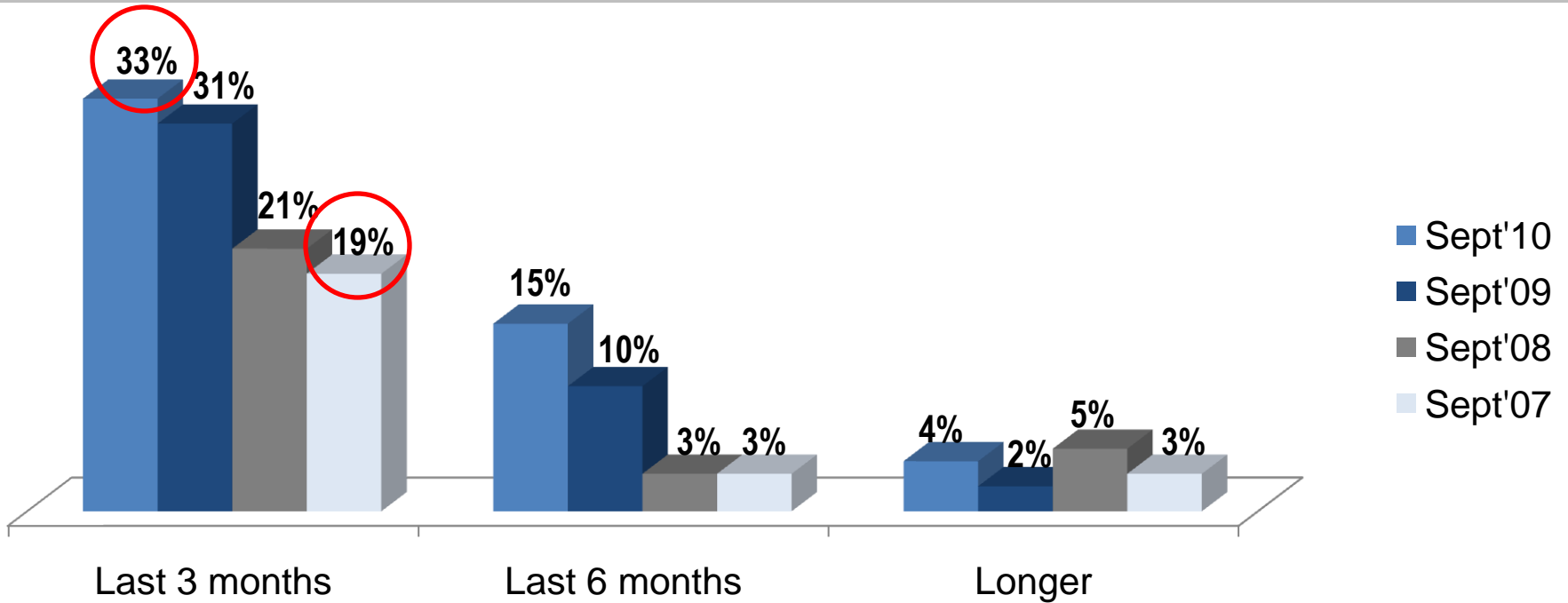


Base: All respondents

# Frequency of Purchases (last 6 months)

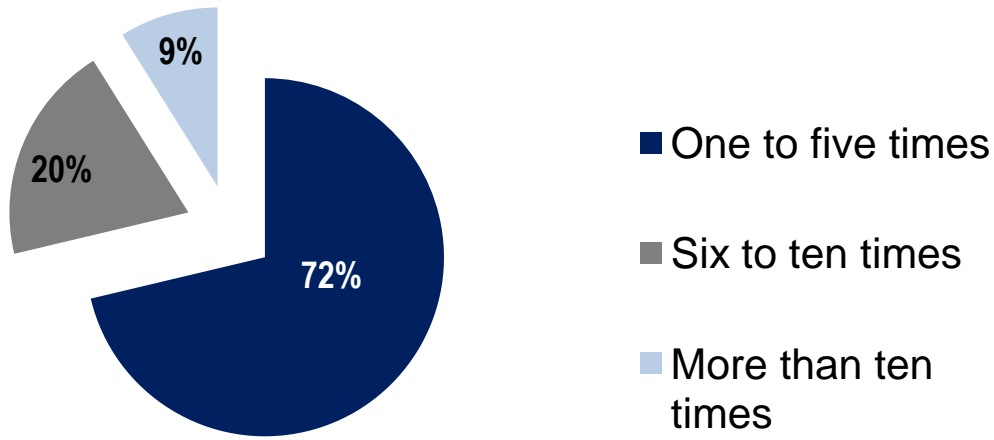


Base – eCommerce Users

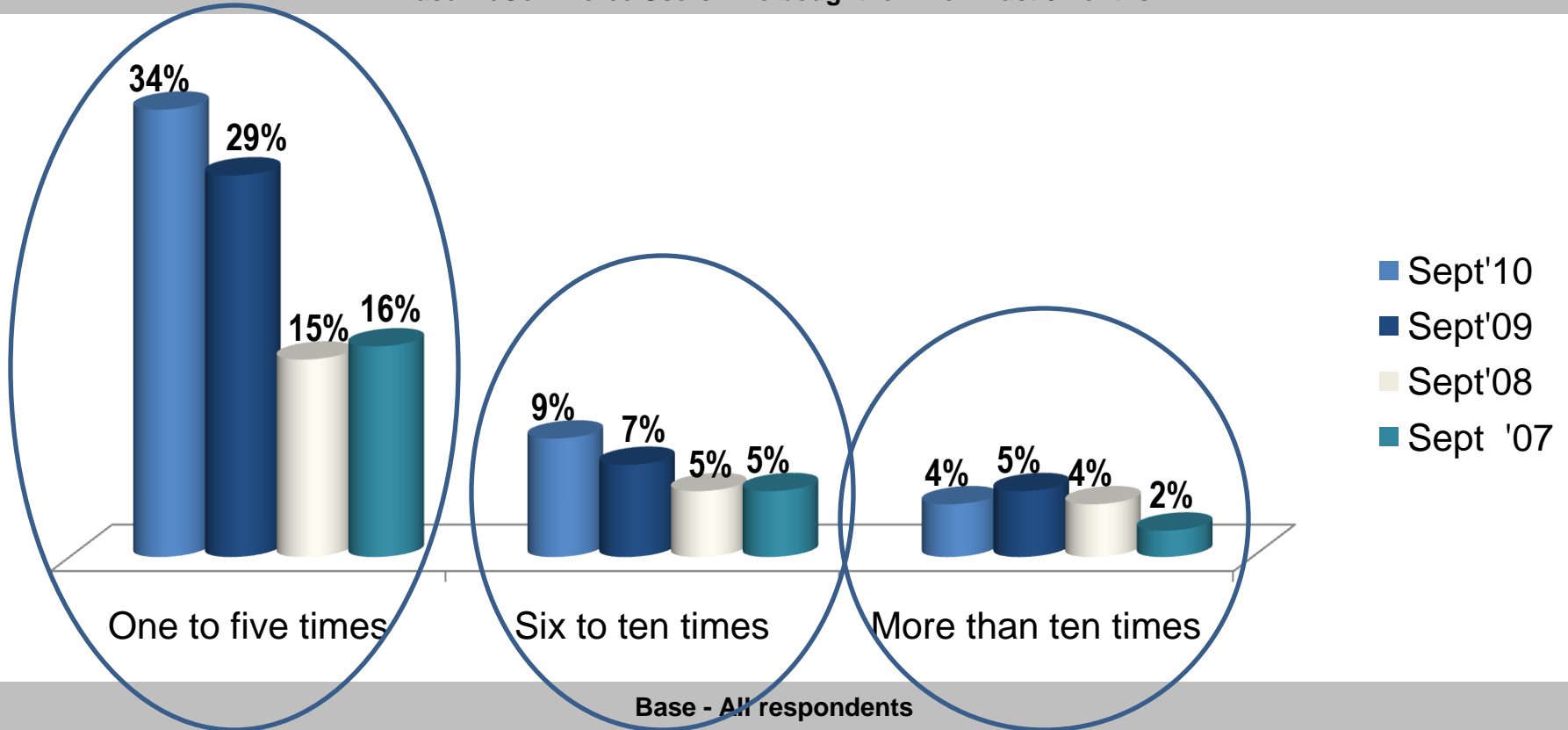


Base - All respondents

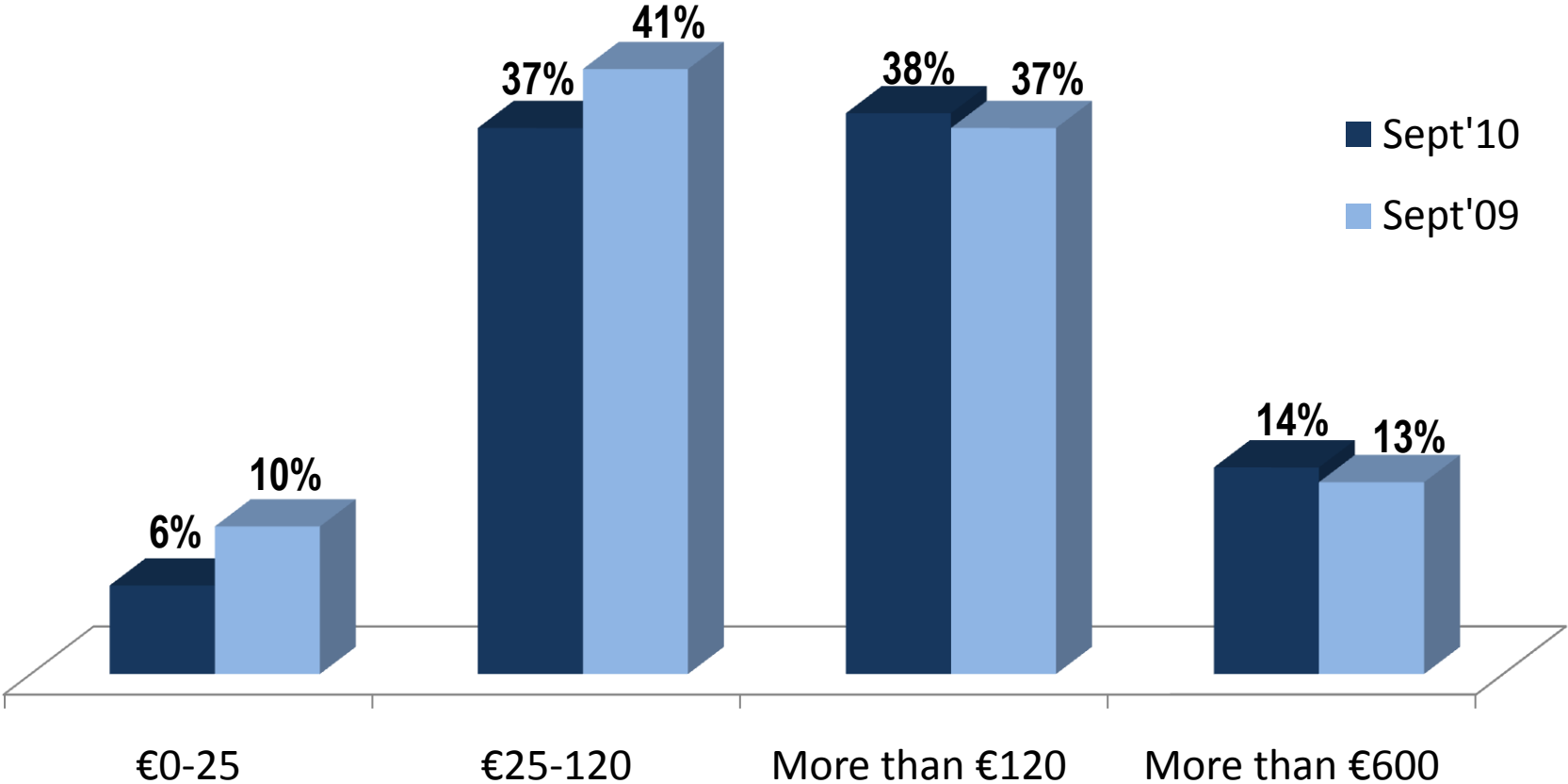
# Frequency of Purchases (last 6 months)



Base – eCommerce Users who bought online in last 6months

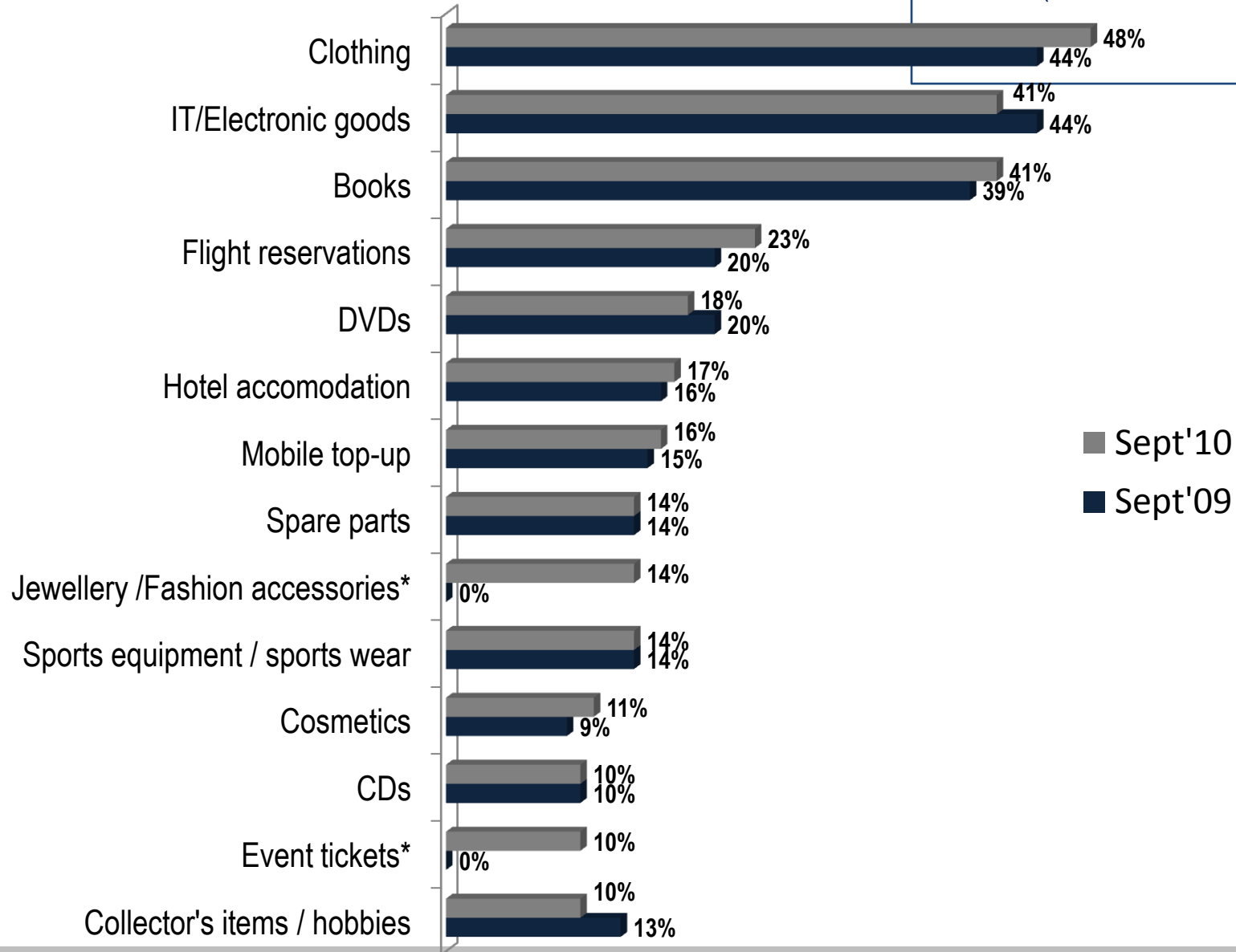


# Amount Spent (last 6 months)



# Items Purchased Online

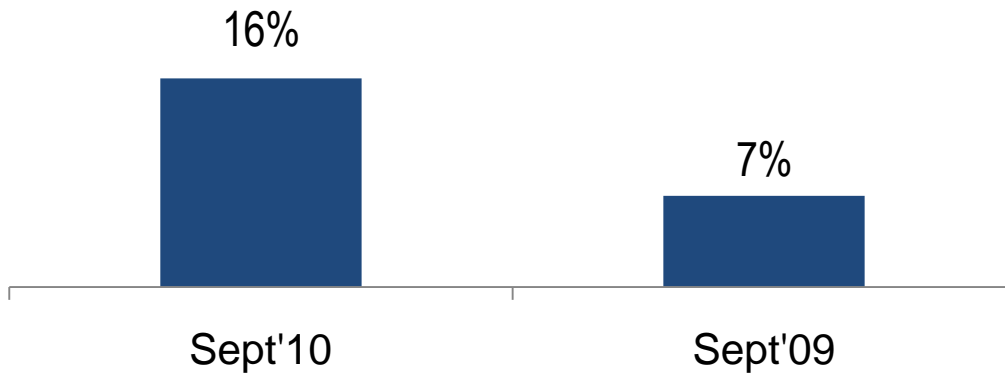
(last 6 months)



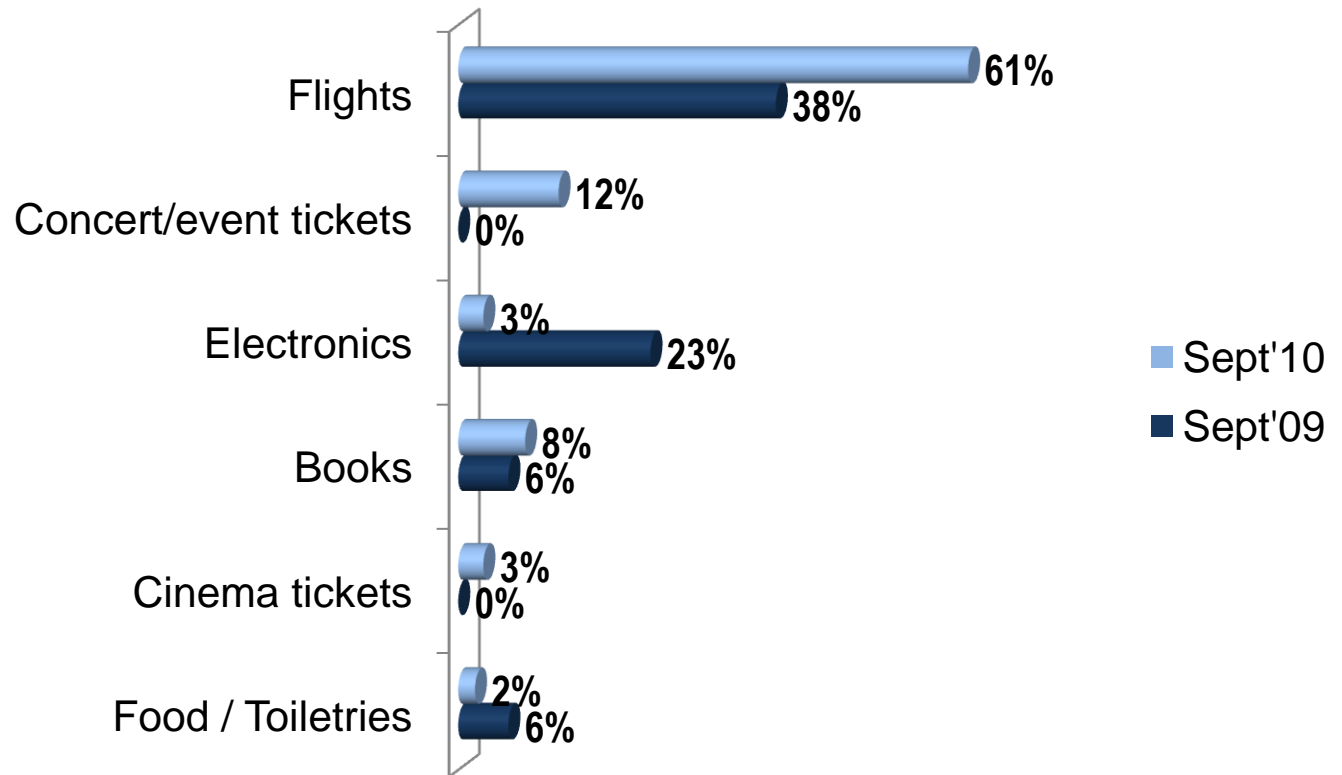
\*added in 2010

Base – eCommerce Users who bought in last 6months

# Online Purchases from Maltese Websites

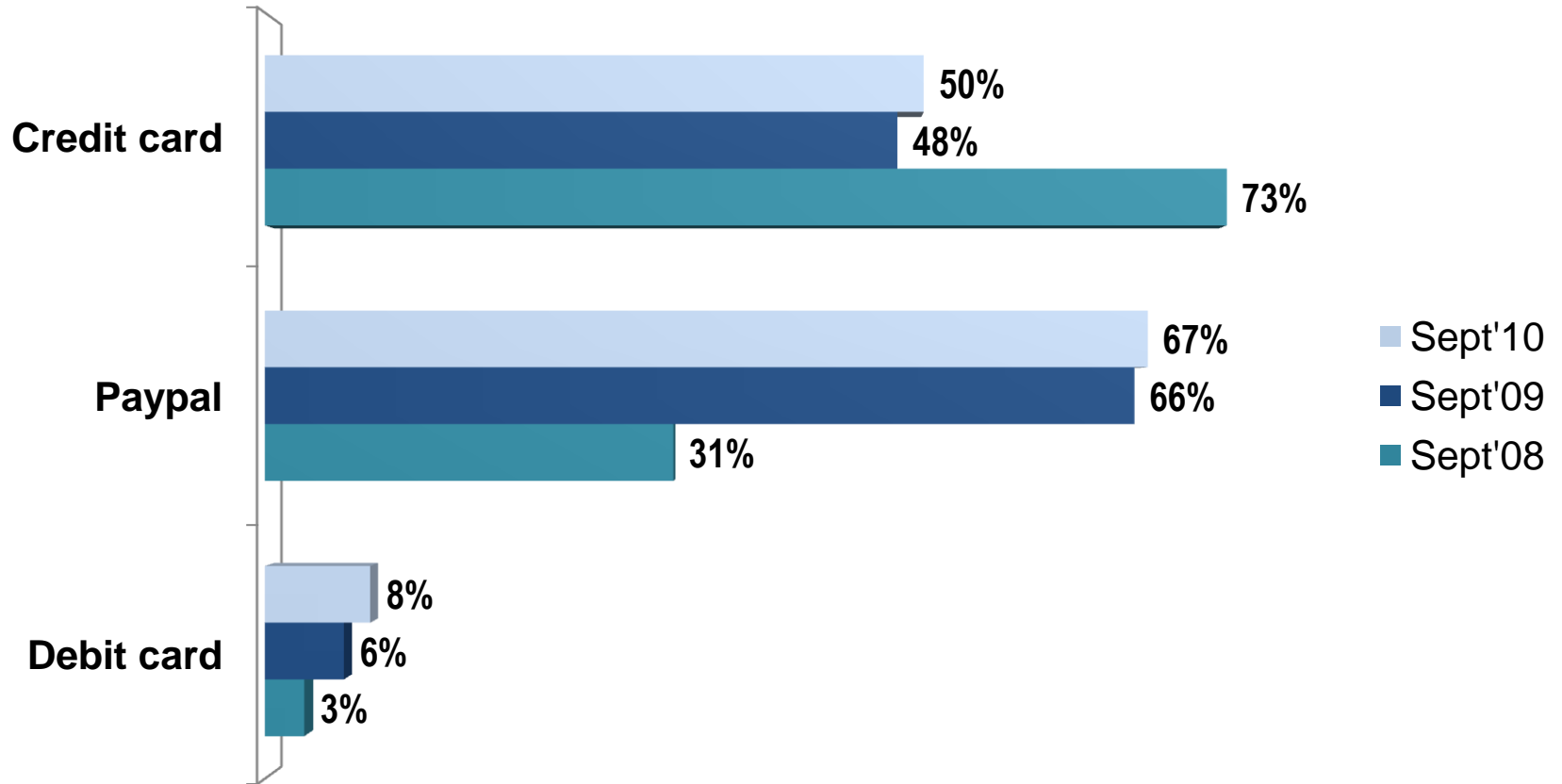


Base – eCommerce Users who bought online in last 6months



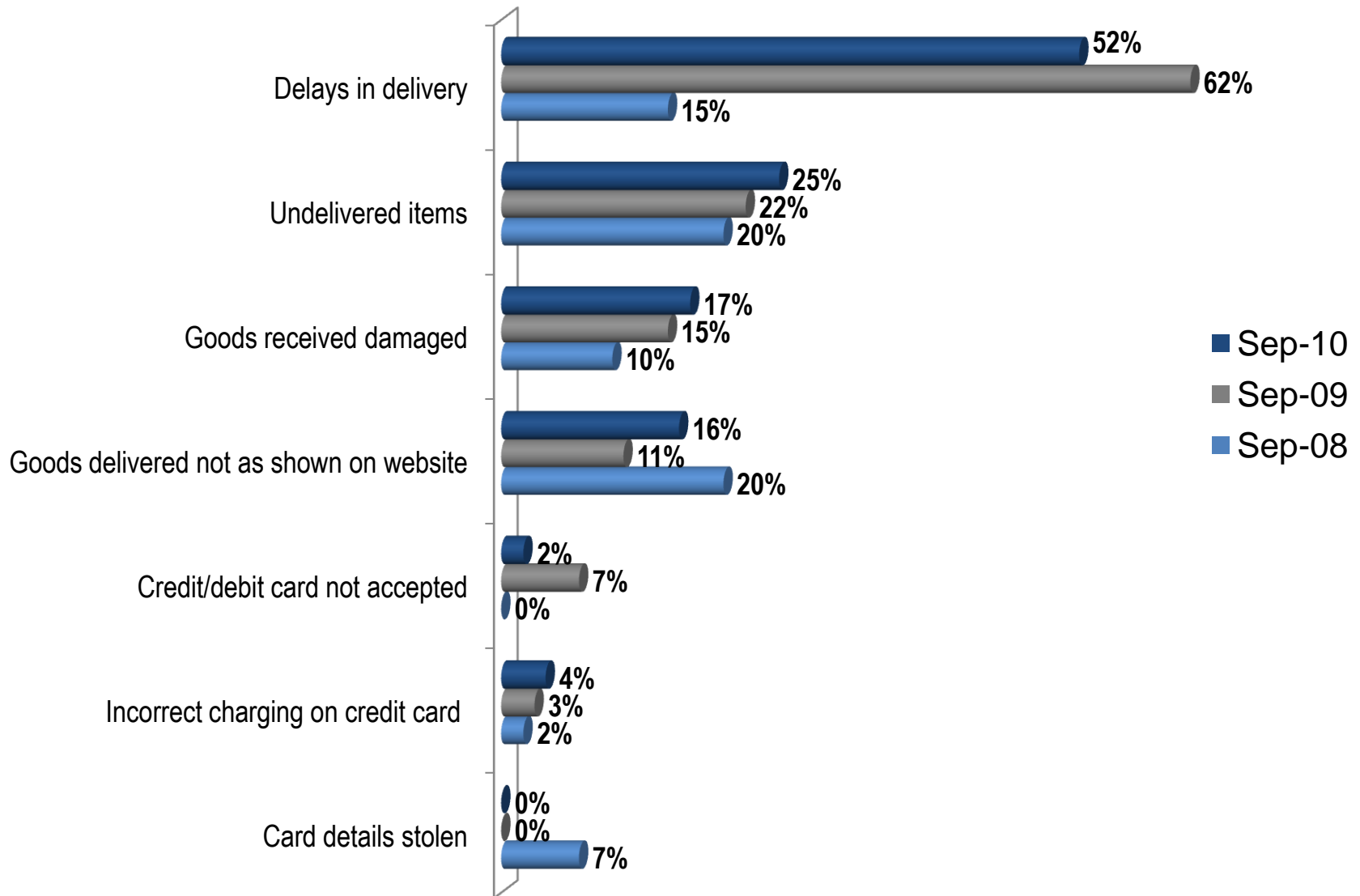
Base – those who bought online from Maltese sites in last 6 months

# Method of Payment Used



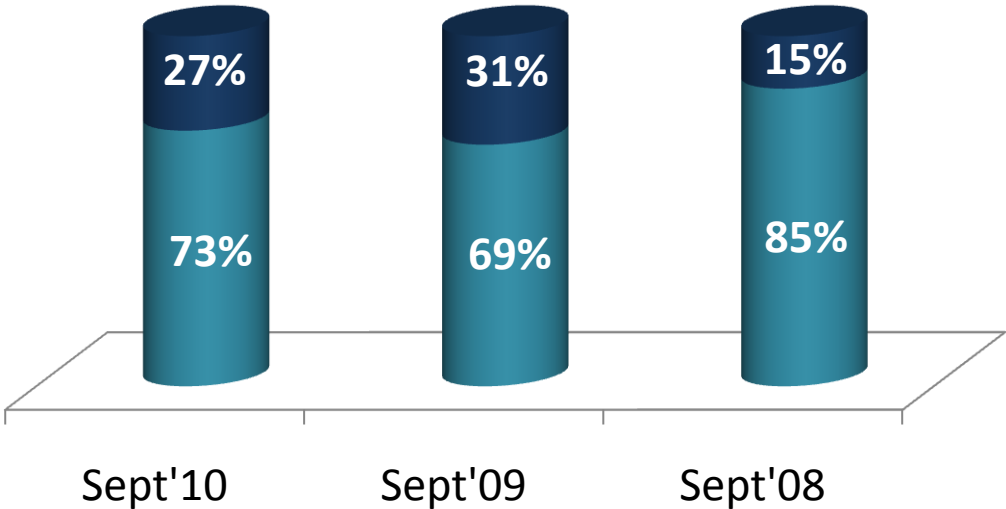
Base – eCommerce Users who bought in last 6months

# Type of Problems Encountered

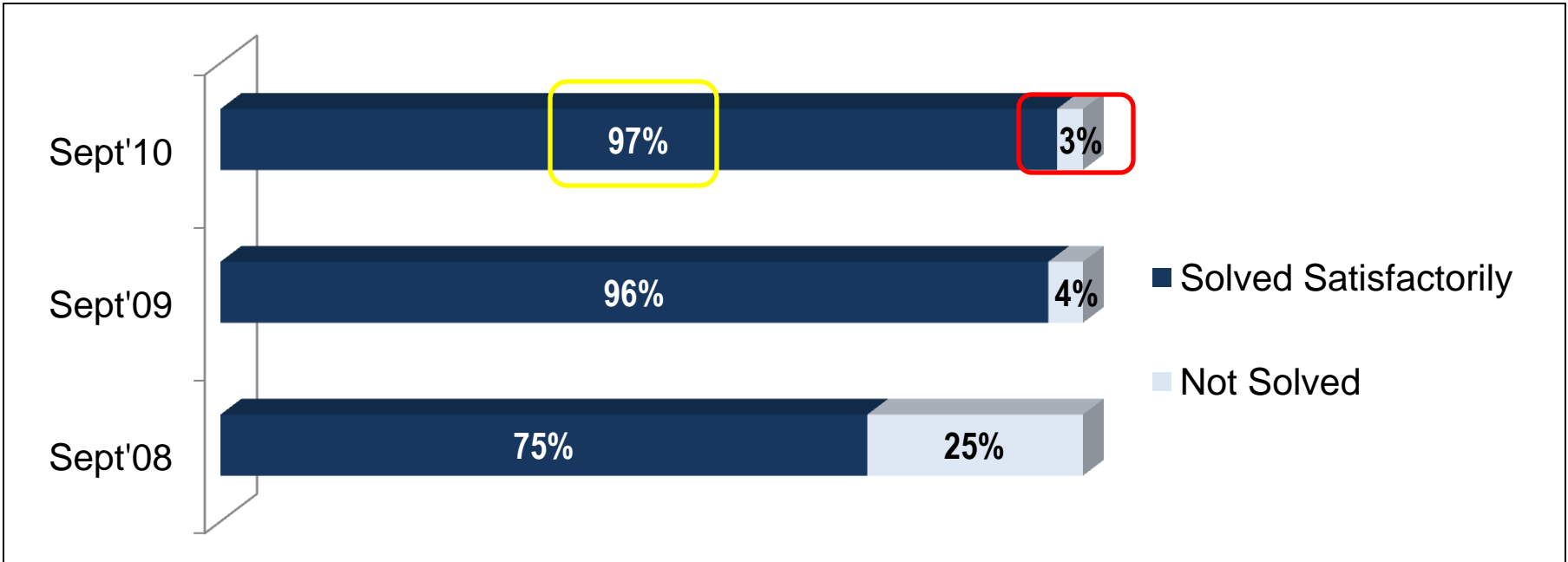


Base – eCommerce Users who encountered problems in last 6months

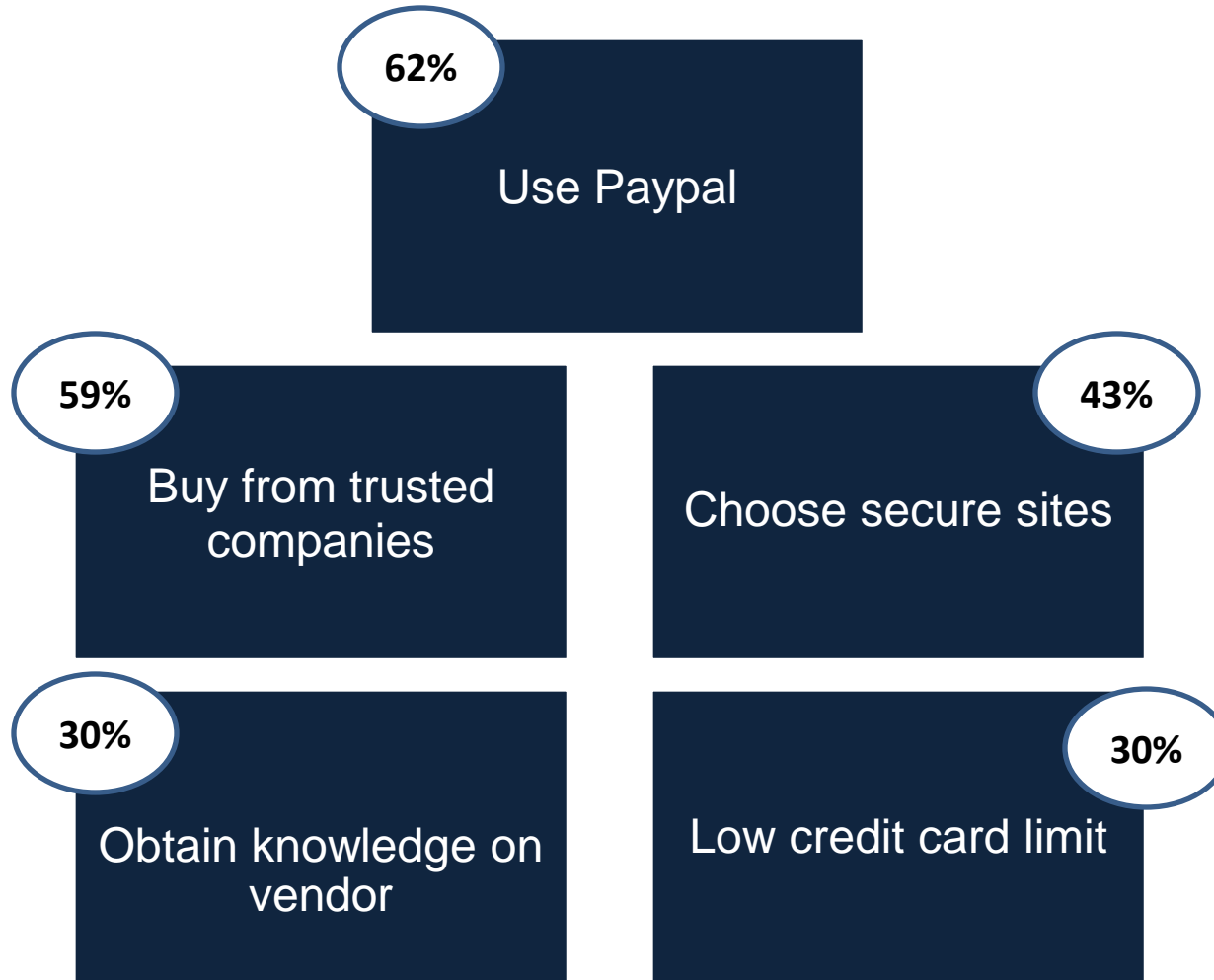
# Problems Encountered (last 6 months)



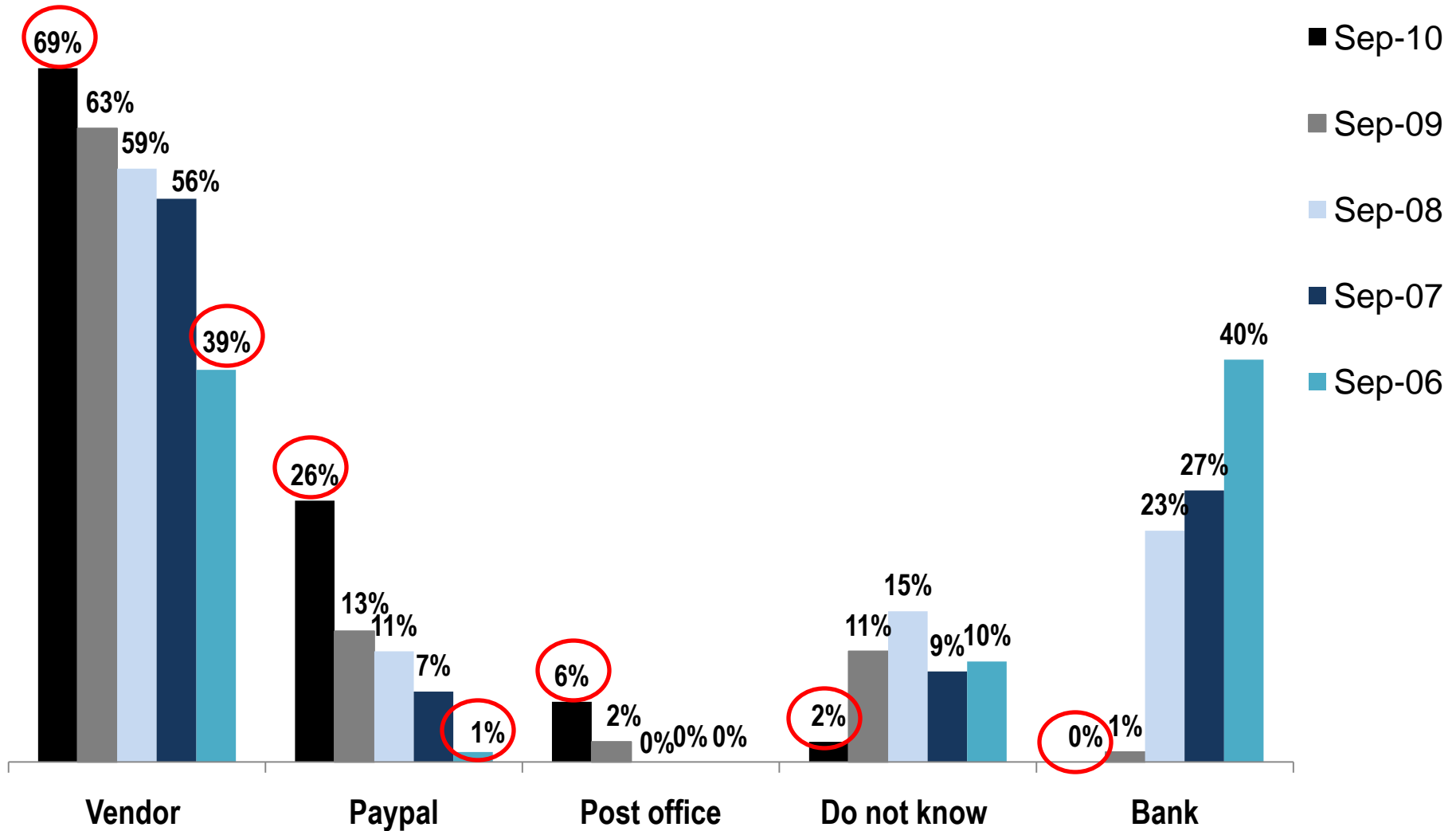
- At least one problem
- No problem



# Precautions when Buying Online

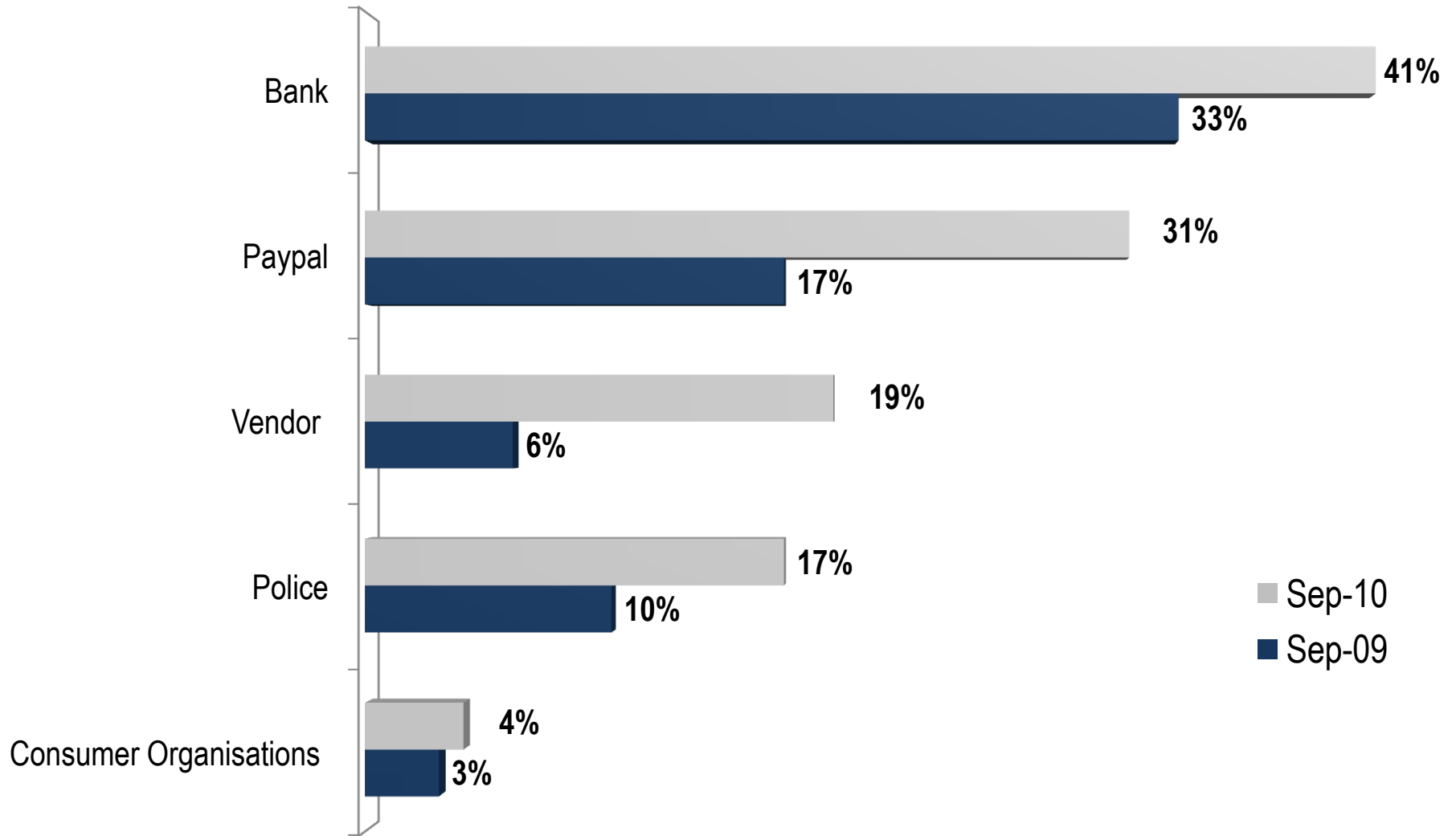


# Contact Person in case of eCommerce Difficulty



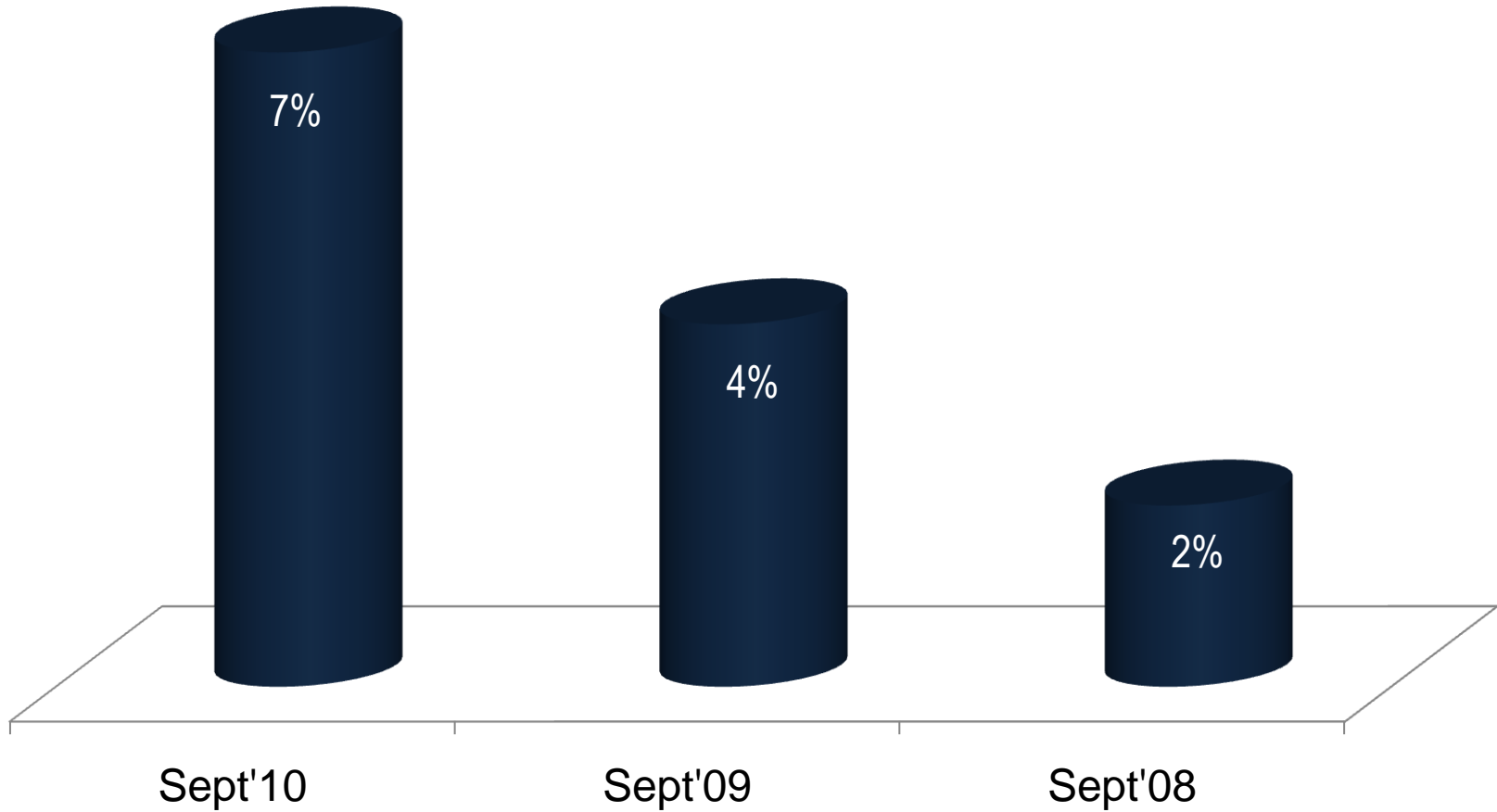
Base – eCommerce Users

# Contact Person in case of Scam or Fraud



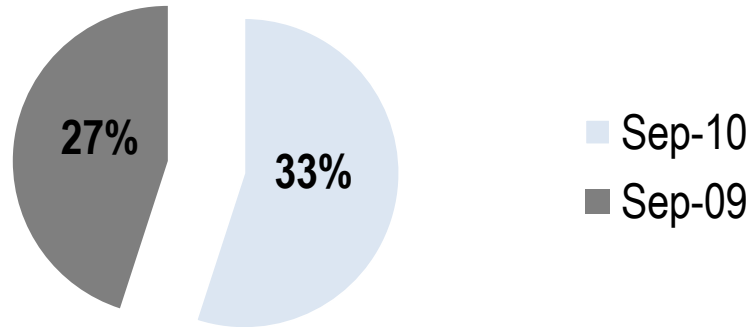
Base – eCommerce Users who bought in last 6months

MCA as the  
eCommerce  
Regulator

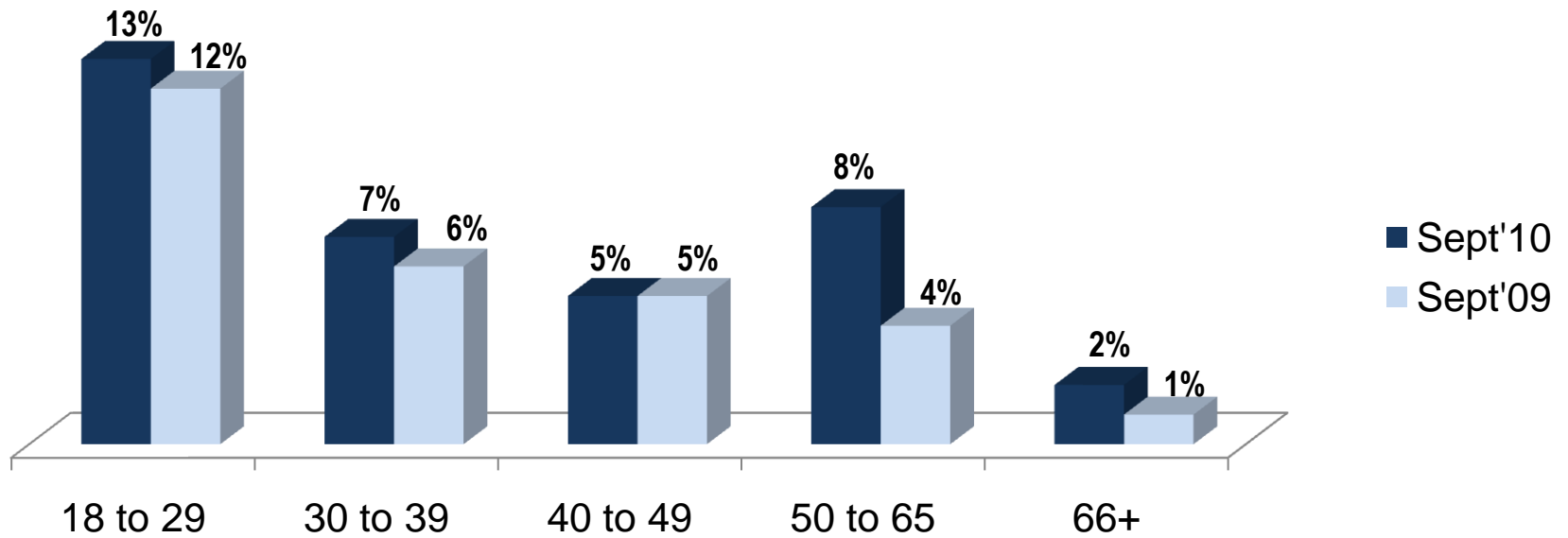


Base – eCommerce Users who bought in last 6months

# Buying on Behalf of Others

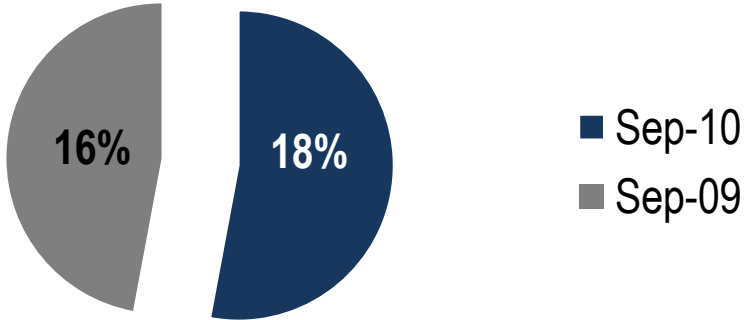


Base – eCommerce Users who bought in last 6months

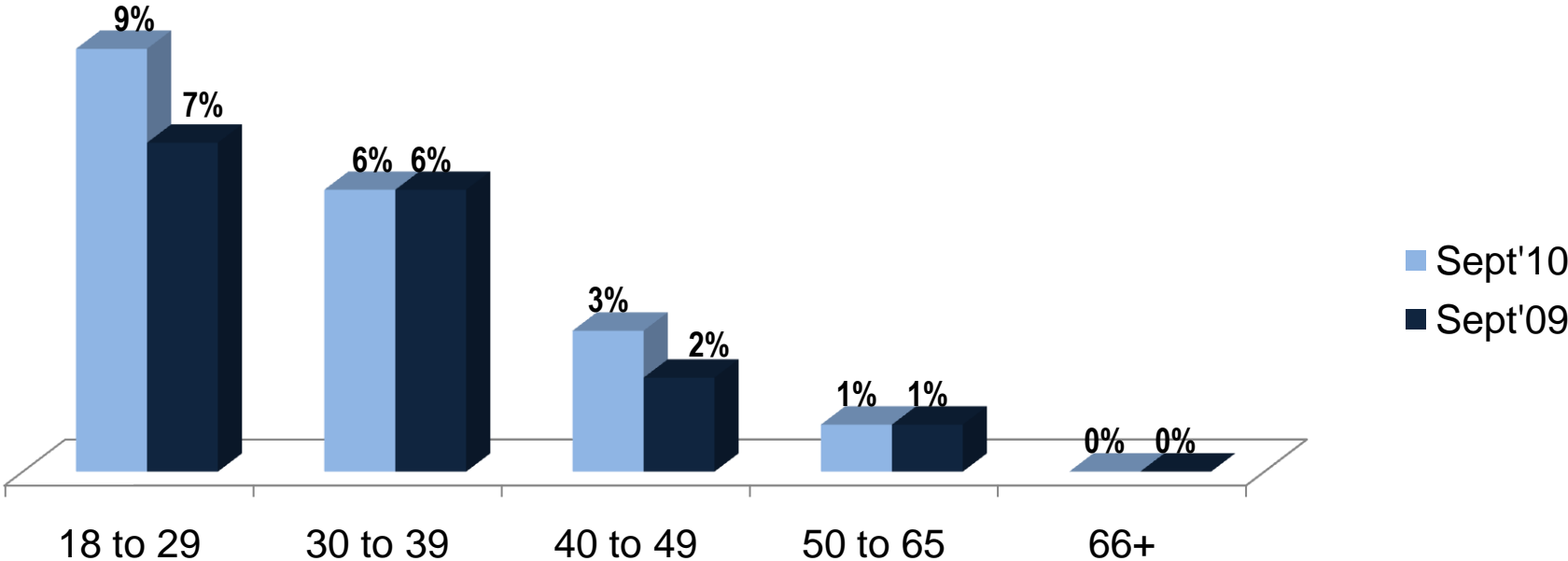


Base – eCommerce Users who bought for others in last 6months

Commissioned  
others to buy for  
them

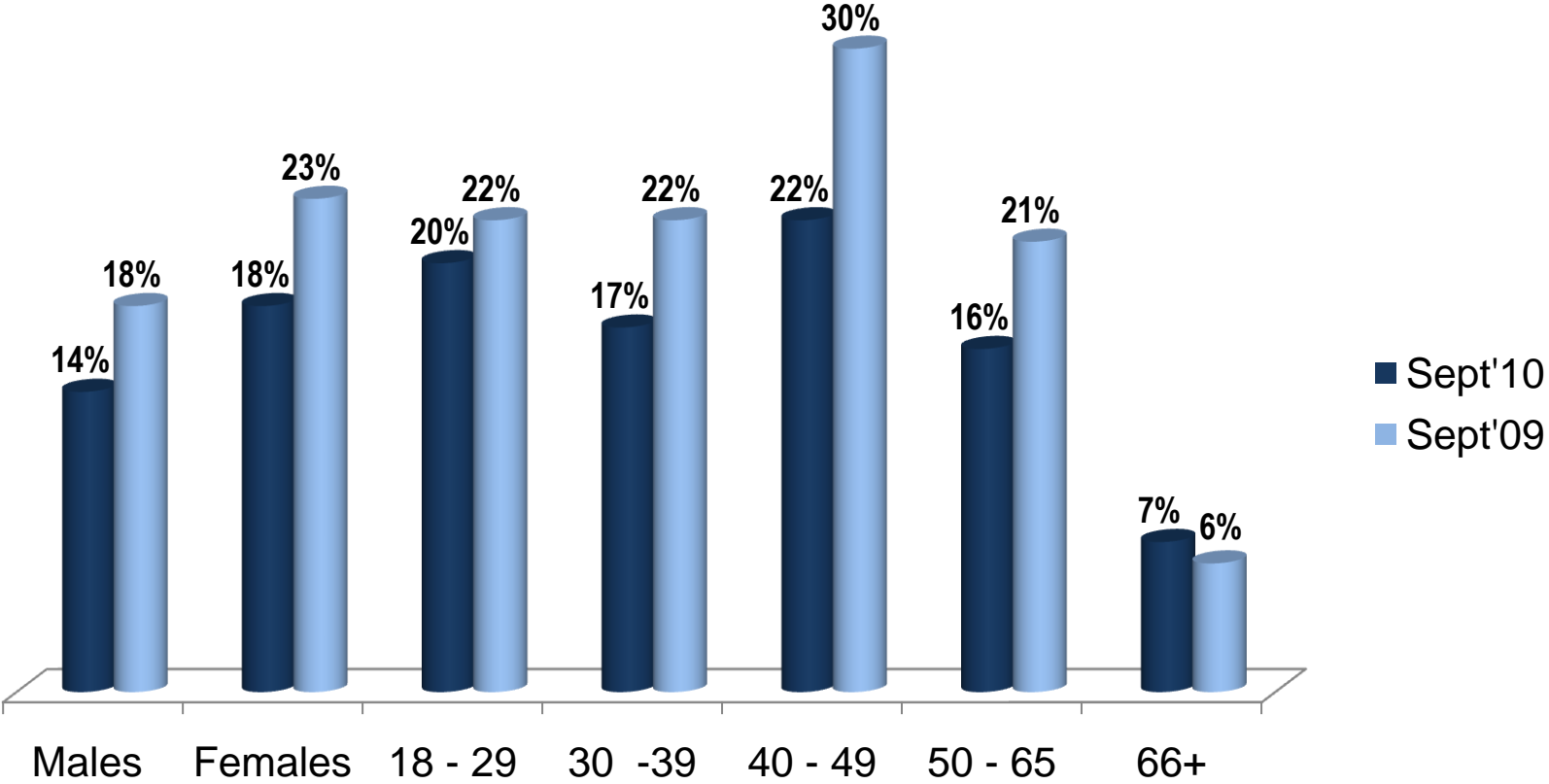
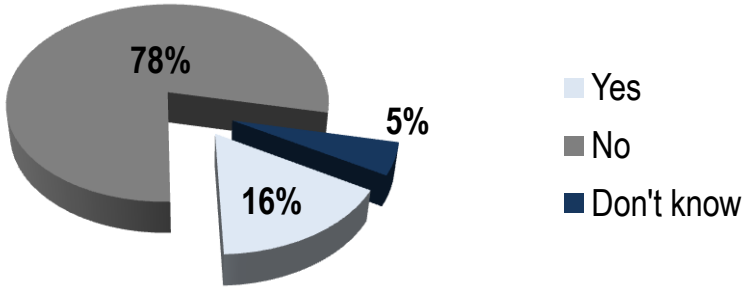


Base – as a % of non-Internet or non-eCommerce users

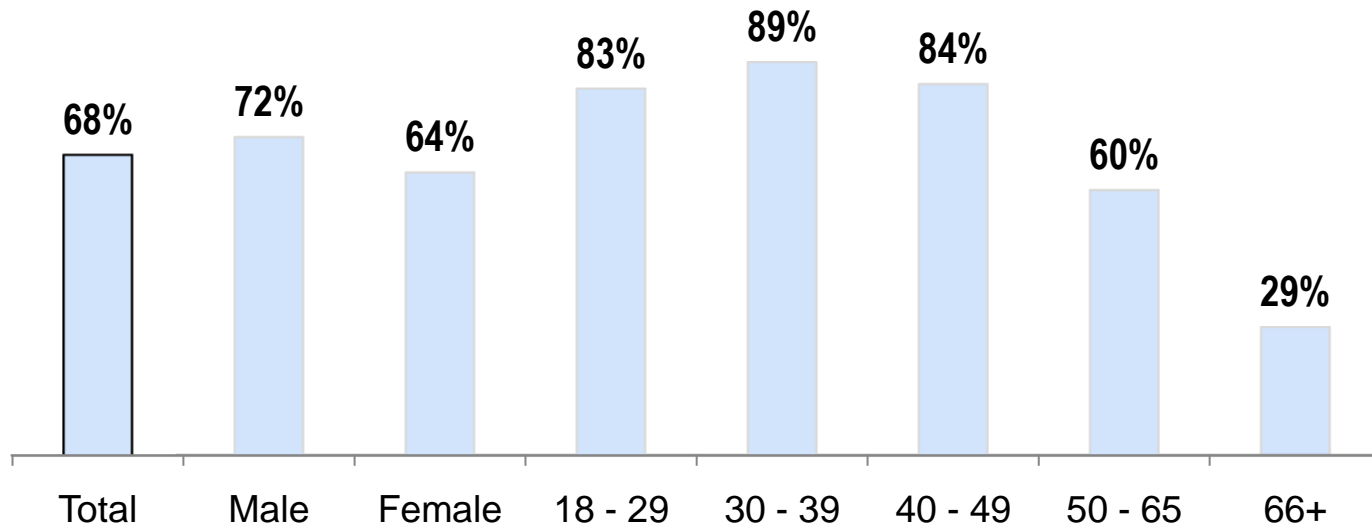


Base – as a % of those who commissioned others to buy for them

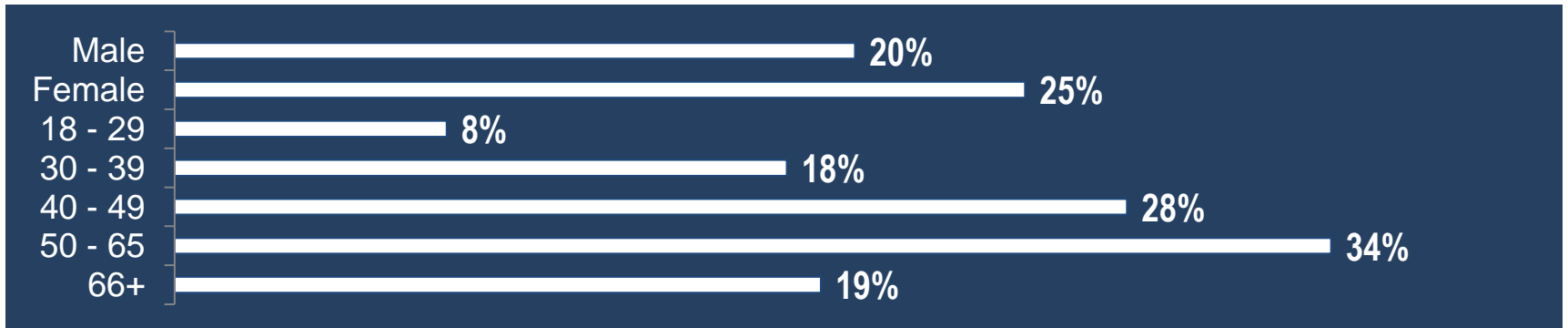
# Attending a Short Course about Online Buying



# Owens a Credit/Debit Card



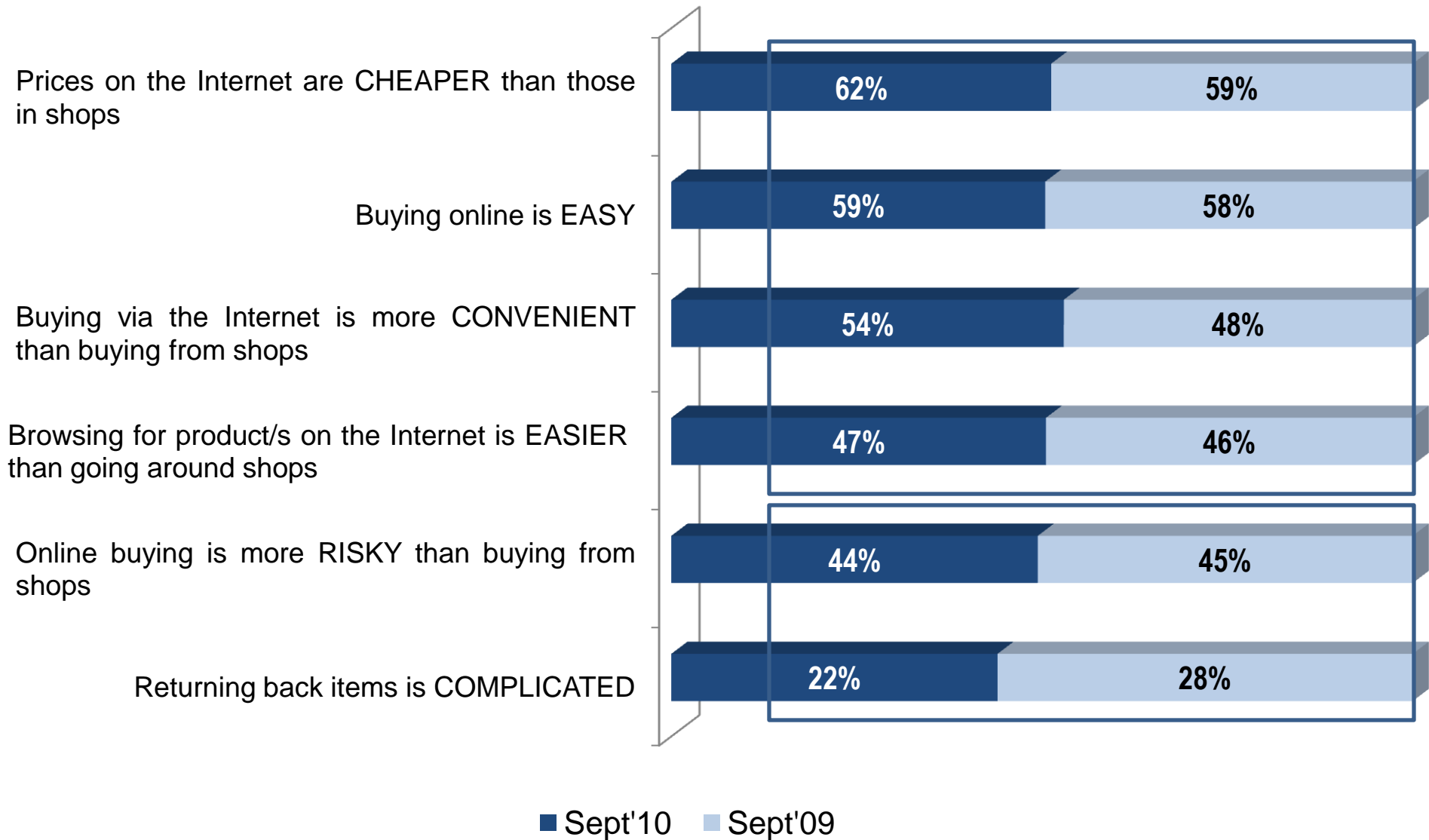
Base - All respondents



Base - as a % of non-Internet or non-eCommerce users

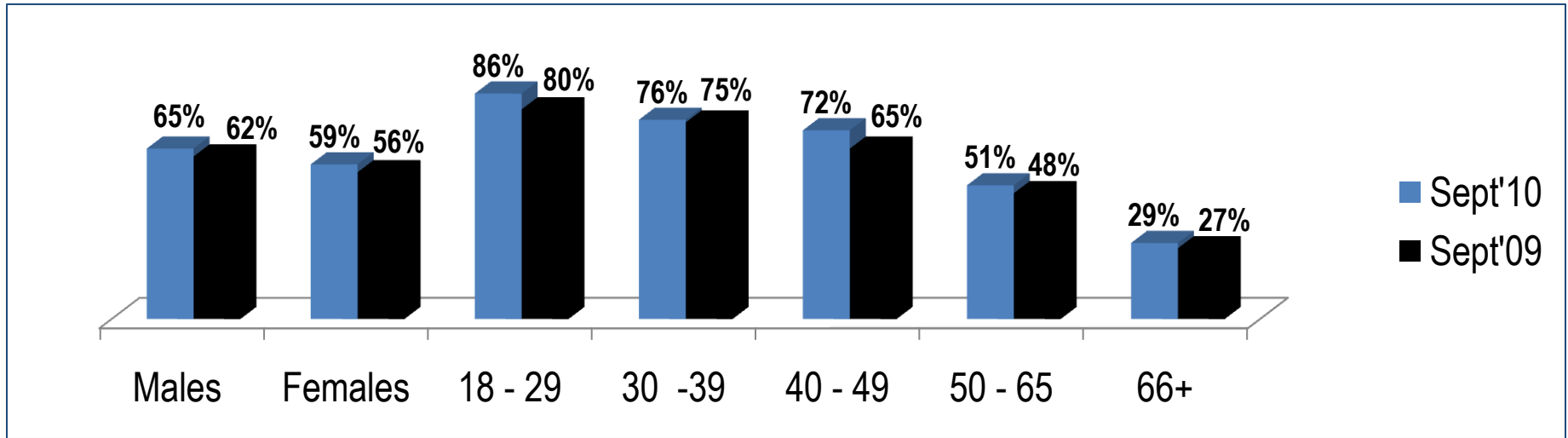
# PERCEPTIONS

## Online Buying

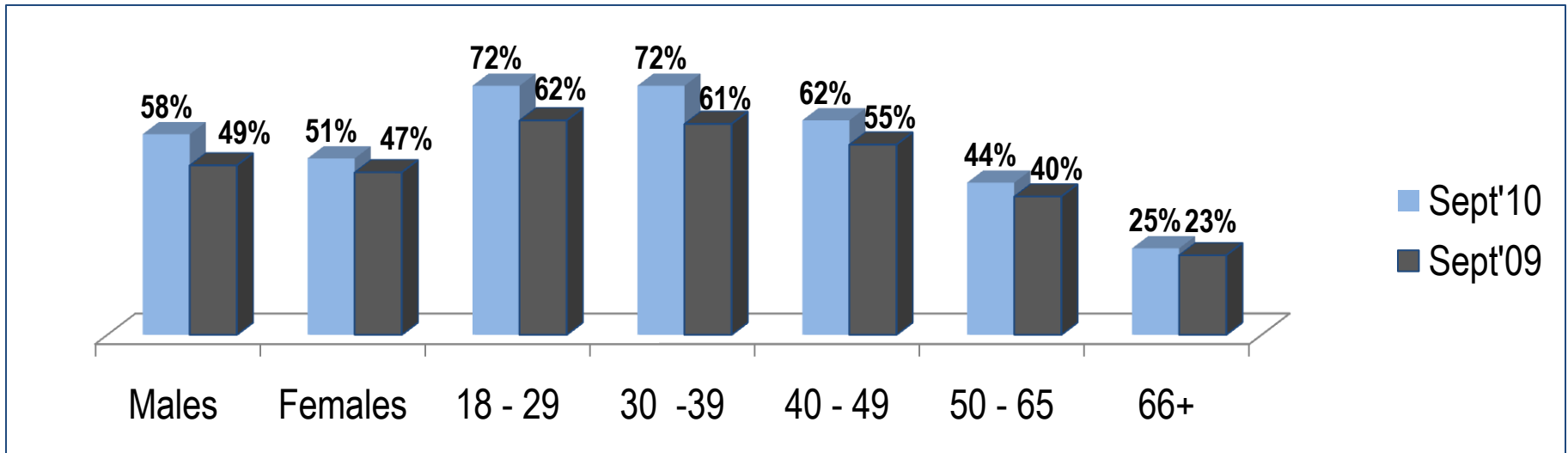


Base - All respondents

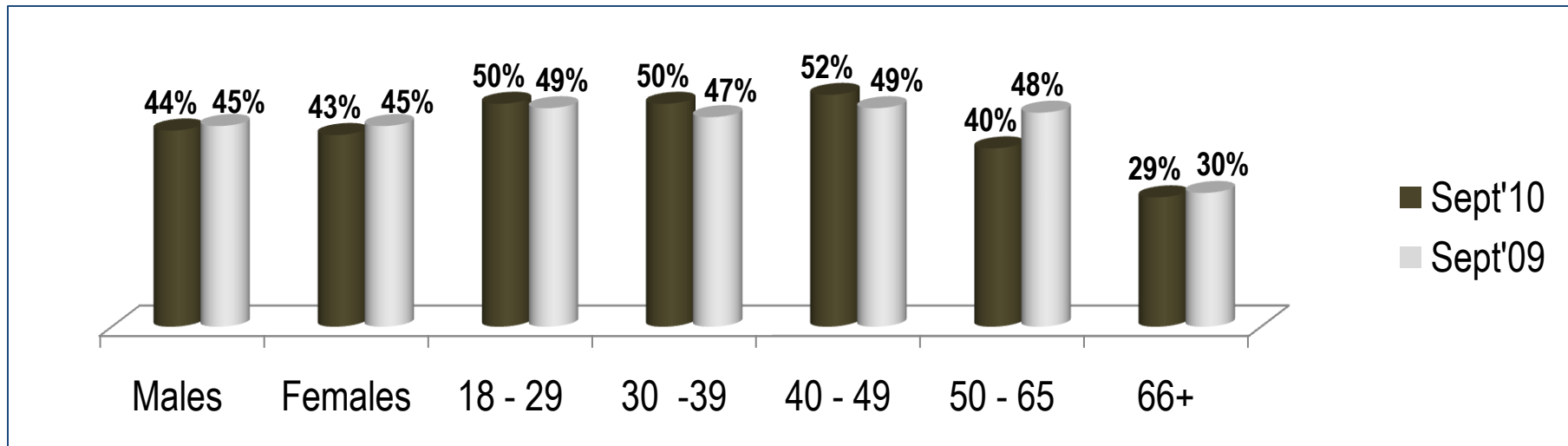
## Prices on the Internet are CHEAPER than those in shops



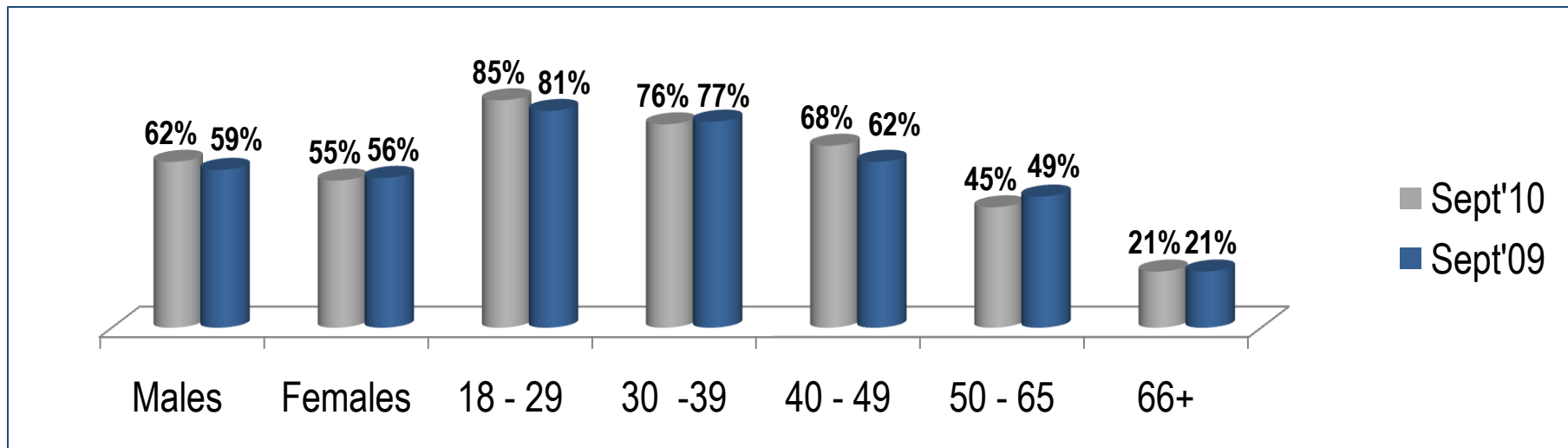
## Buying via the Internet is more CONVENIENT than buying from shops



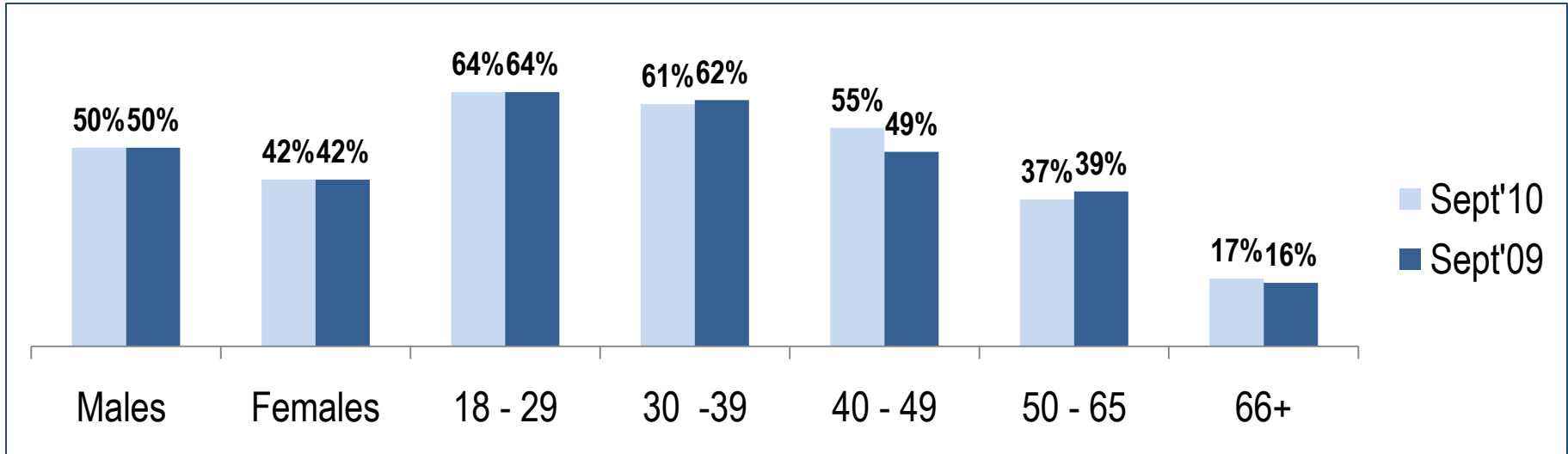
## Online buying is more RISKY than buying from shops



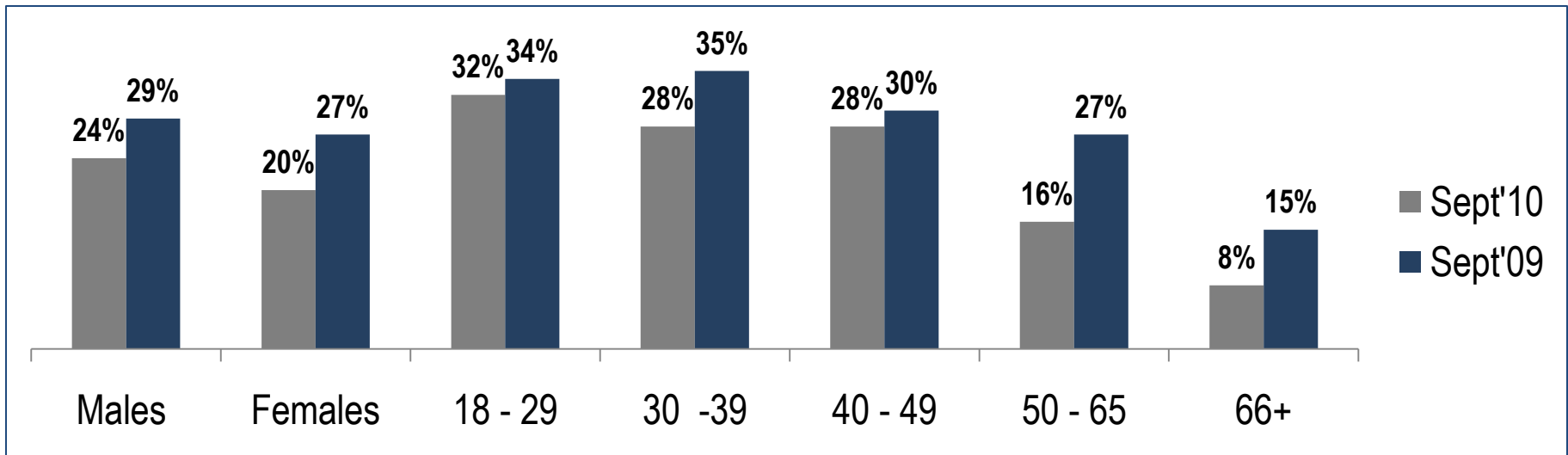
## Buying online is EASY



## Browsing for product/s on the Internet is EASIER than going around shops



## Returning back items is COMPLICATED

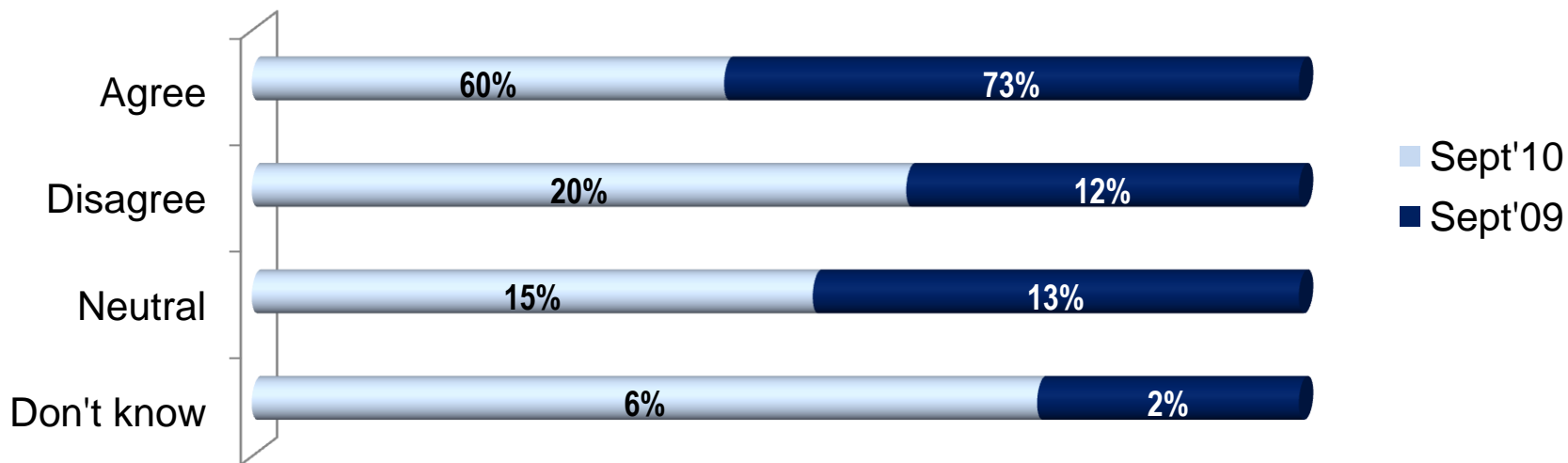


# Reasons For Not Buying Online

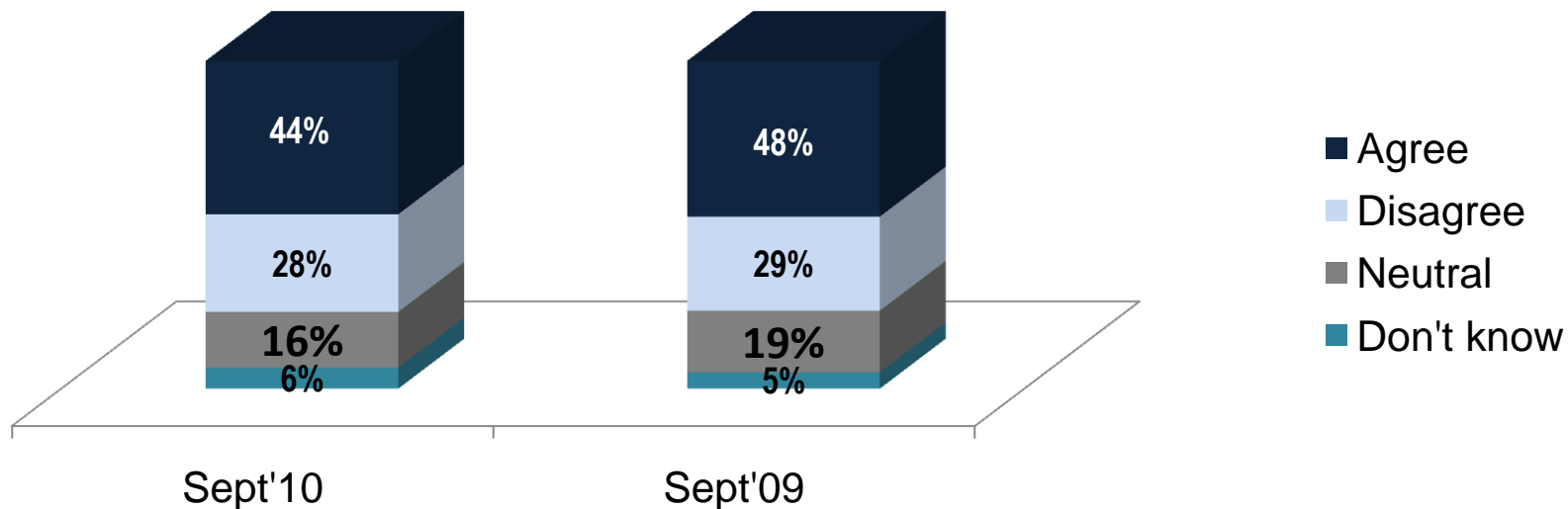


Base - As a % of those who NEVER bought online and those who bought online more than 6 months ago

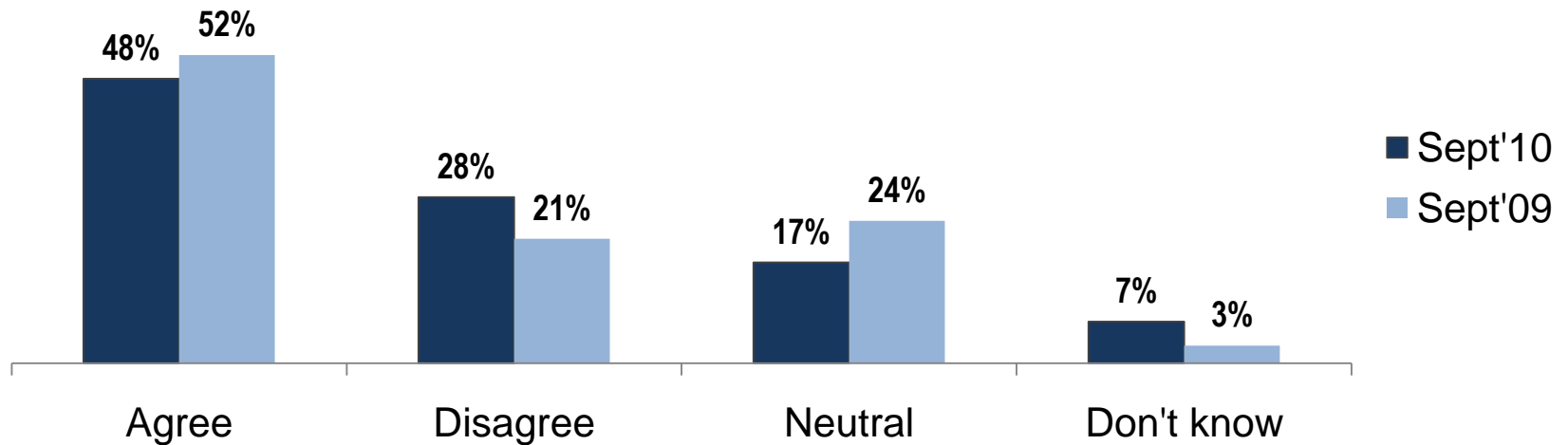
You don't buy online because you prefer to see and/ or try on items before buying



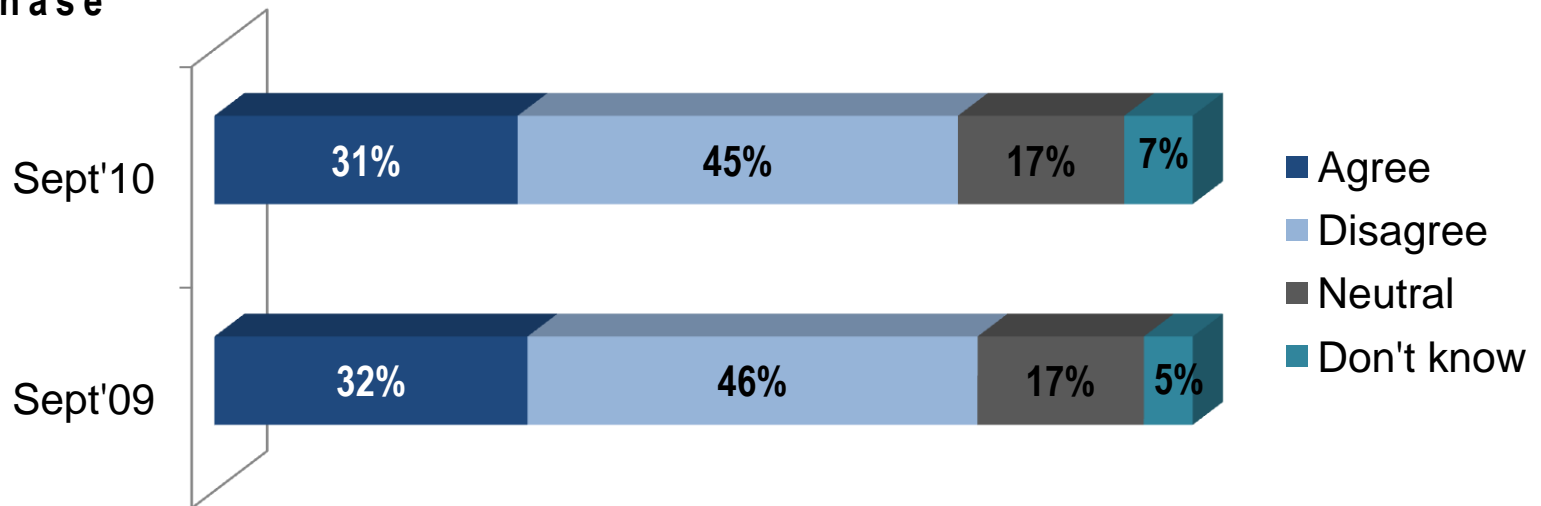
You don't buy online because you're concerned about security



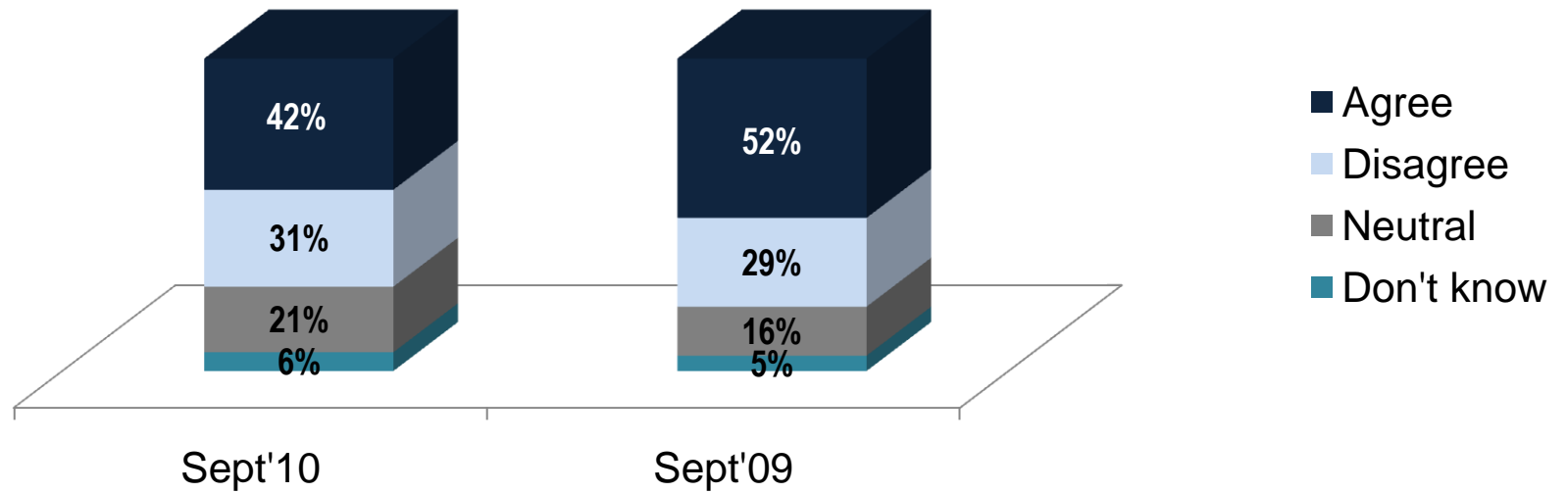
You don't buy online because you're afraid that item/s will not be delivered or damaged or different from what you ordered



You don't buy online because you don't know how to make an online purchase



You don't buy online because **you're not interested or do not need to**



**Thank you for your attention**