



## e-Commerce Survey 5: September 2008

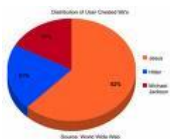
# MCA eCommerce Survey 5



MCA commissioned Ernst & Young to carry out its 5<sup>th</sup> e-Commerce survey.



Previous surveys on E-Commerce usage were held in Sept 06, April 07, Sept 07 and Apr 08.



Aim of MCA surveys is to obtain an **indication** of the level of E-Commerce **usage** across Malta and Gozo and its **potential for growth**.



Comparing results across surveys to identify trends and changes in buying behaviour patterns.

# Methodology



26 close-ended questions conducted by phone over a period of approx. 2 weeks.

✓



✓



✓



✓



Stratified Sample

1600 respondents

Target

At least 400 e-Commerce users

# Methodology

## Sample Quota (based on latest NSO demographic data)

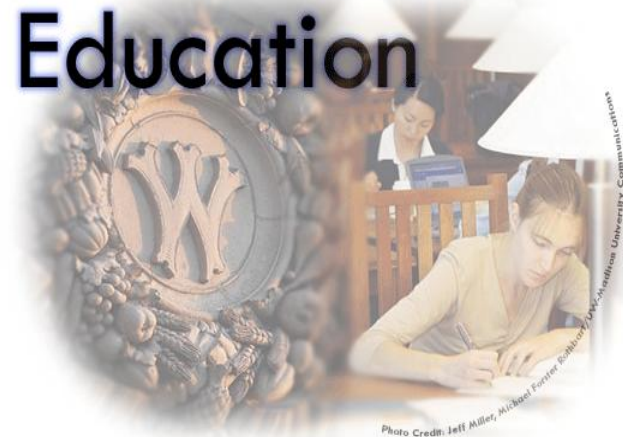
49% Male	51% Female
22% 18-29 yrs	16% 30-39 yrs
18% 40-49 yrs	27% 50-65 yrs
16% - 66+ yrs	



## Educational Level

Primary	22%
Secondary	<b>50%</b>
Tertiary	28%

# Education



## New in this survey...

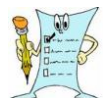


Respondents asked whether they did any of the following:

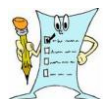
- ✓ Downloaded items against payment;
- ✓ Internet banking (*this was also asked in Sept'06*);
- ✓ Paid bills online;
- ✓ eGov services (*this was also asked in Sept'06*).



Educational background



Buying through auctions



Question re problems encountered online:

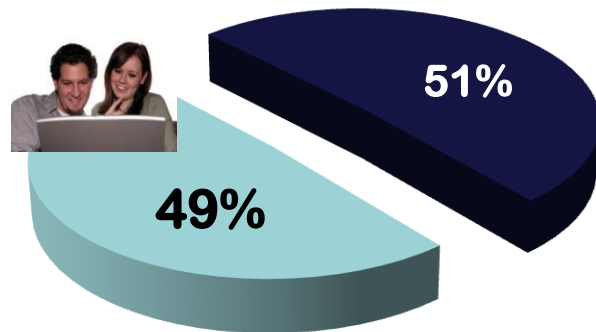
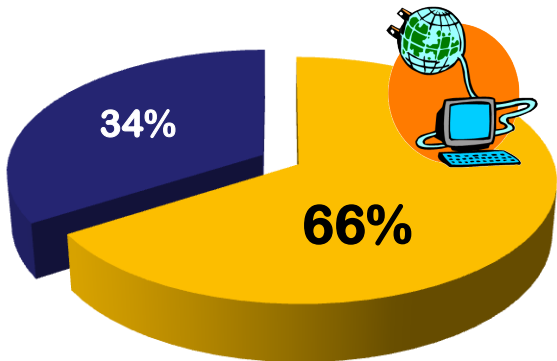
- ✓ Set pre-defined time
- ✓ Was problem solved in a satisfactory manner?
- ✓ Would you buy again?



# Preliminary Results

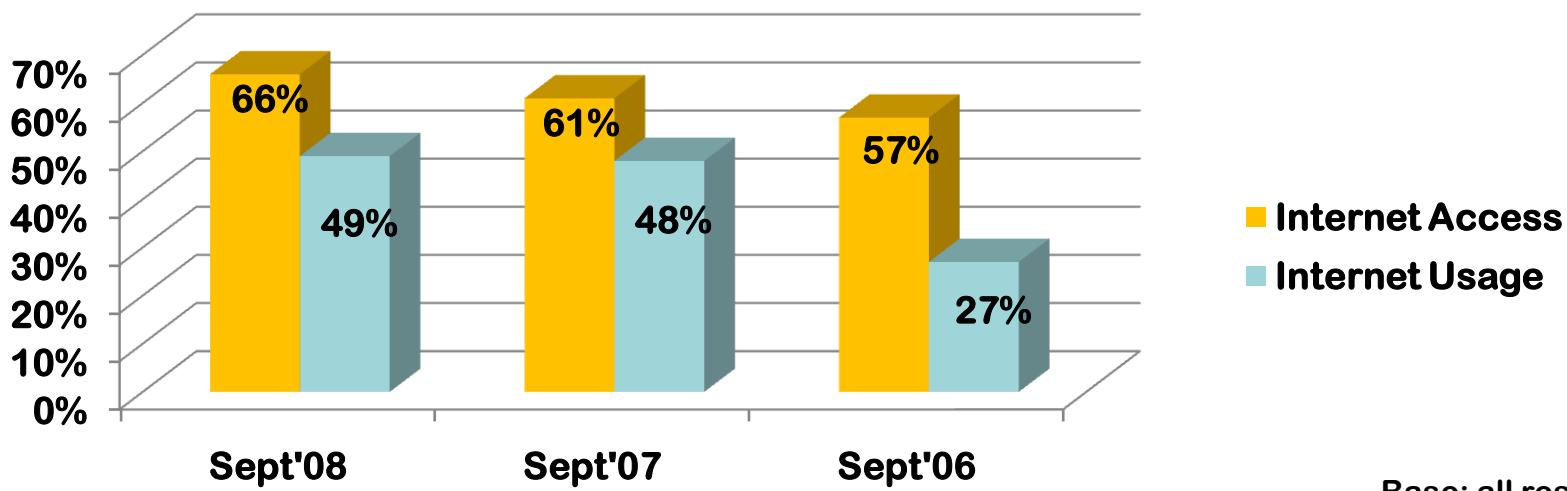
web

# Internet Access vs Internet Usage



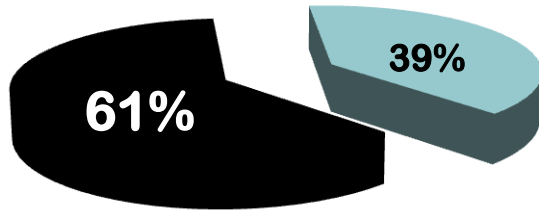
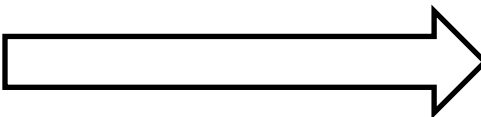
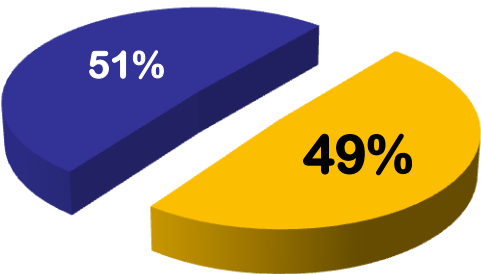
■ Internet Access ■ No Internet Access

■ Internet Usage ■ No Internet Usage



Base: all respondents

# Internet Usage vs e-Commerce Usage

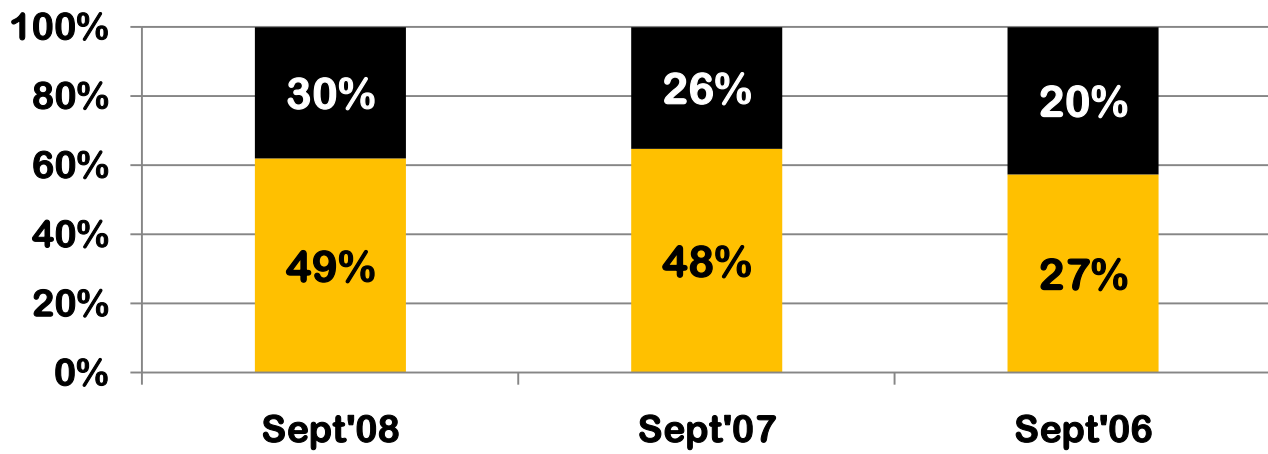


■ Internet Usage ■ No Internet Usage

■ eCommerce Usage ■ No eCommerce Usage

Base: all respondents

Base: Internet users



■ eCommerce Usage ■ Internet Usage

Base: all respondents



## Reasons for using the Internet

	Sept'08
For Information Purposes	81%
Purchases Online	61%
Communication (e-mail, chatting)	35%
Browse Products	11%
Work	7%
Other Reasons	6%

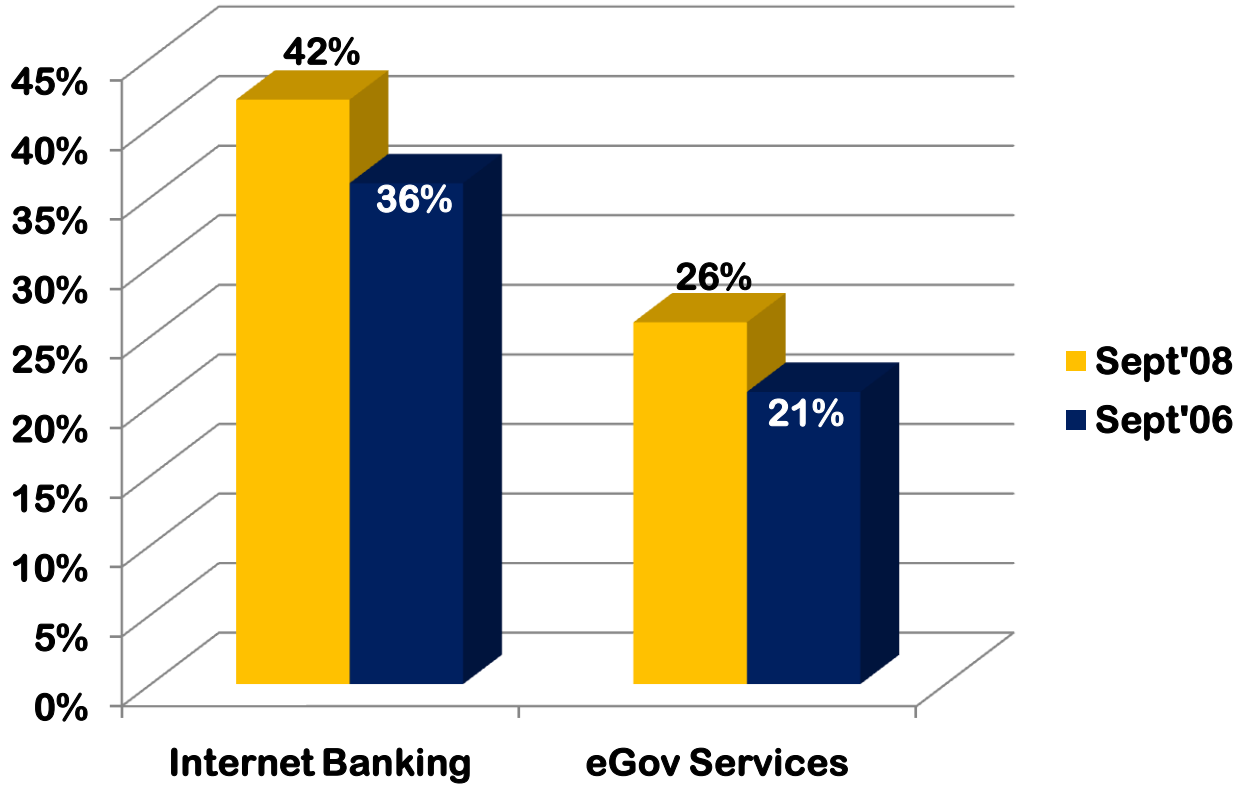
Base: Internet users

## Reasons for NOT using the Internet

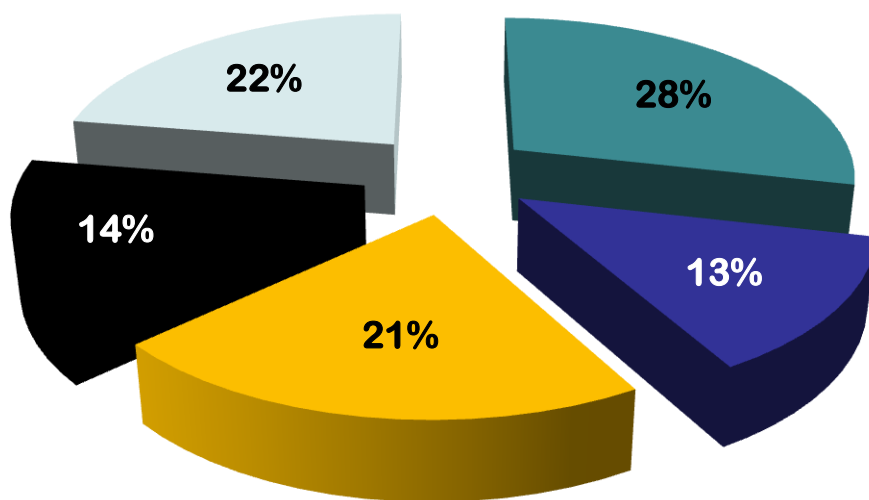
	Sept'08
Do not know how to use PC and/or internet	53%
Do not need/not interested in the internet	27%
Do not have time	20%

Base: those that do NOT use the Internet

# Internet services



# Time spent using the Internet / Week

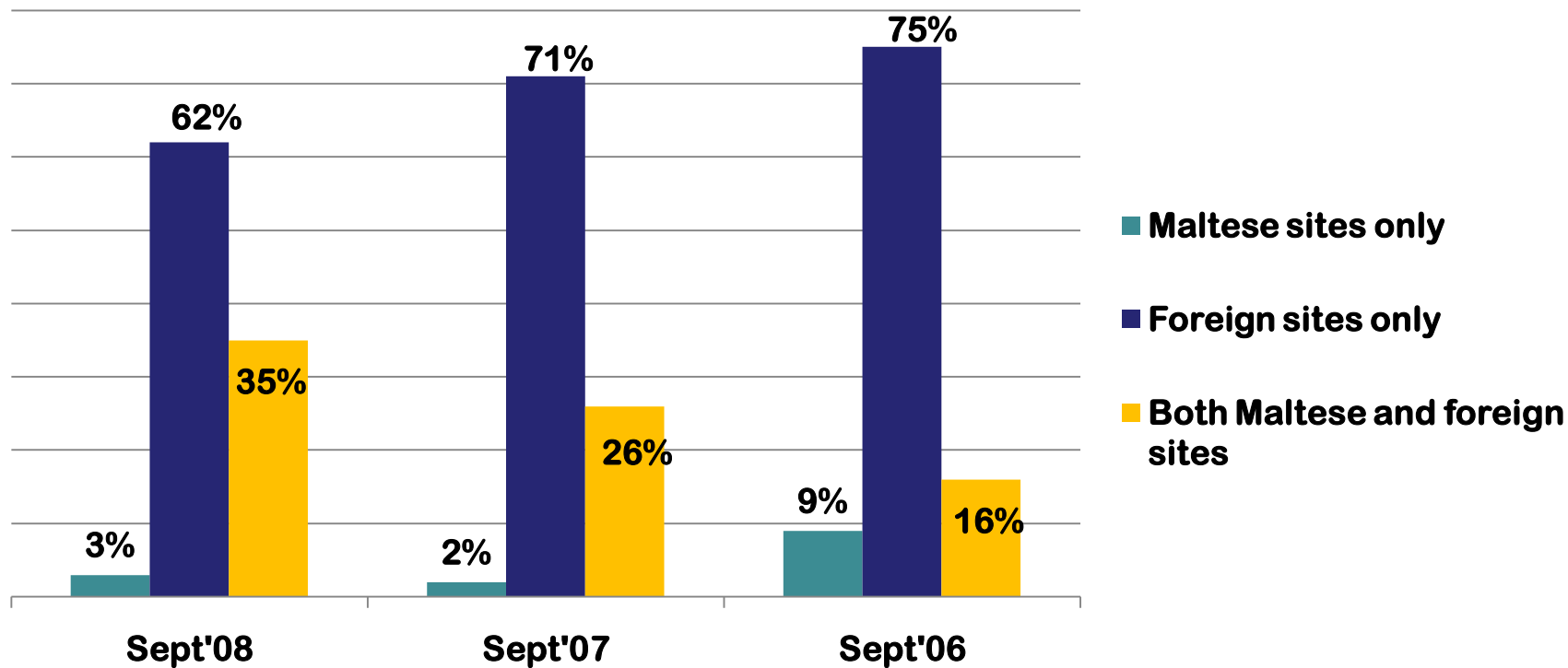


- Up to 4 hours
- From 4 to 6 hours
- From 7 to 12 hours
- From 13 to 20 hours
- More than 20 hours

Base: Internet users



# Maltese Sites vs Foreign Sites



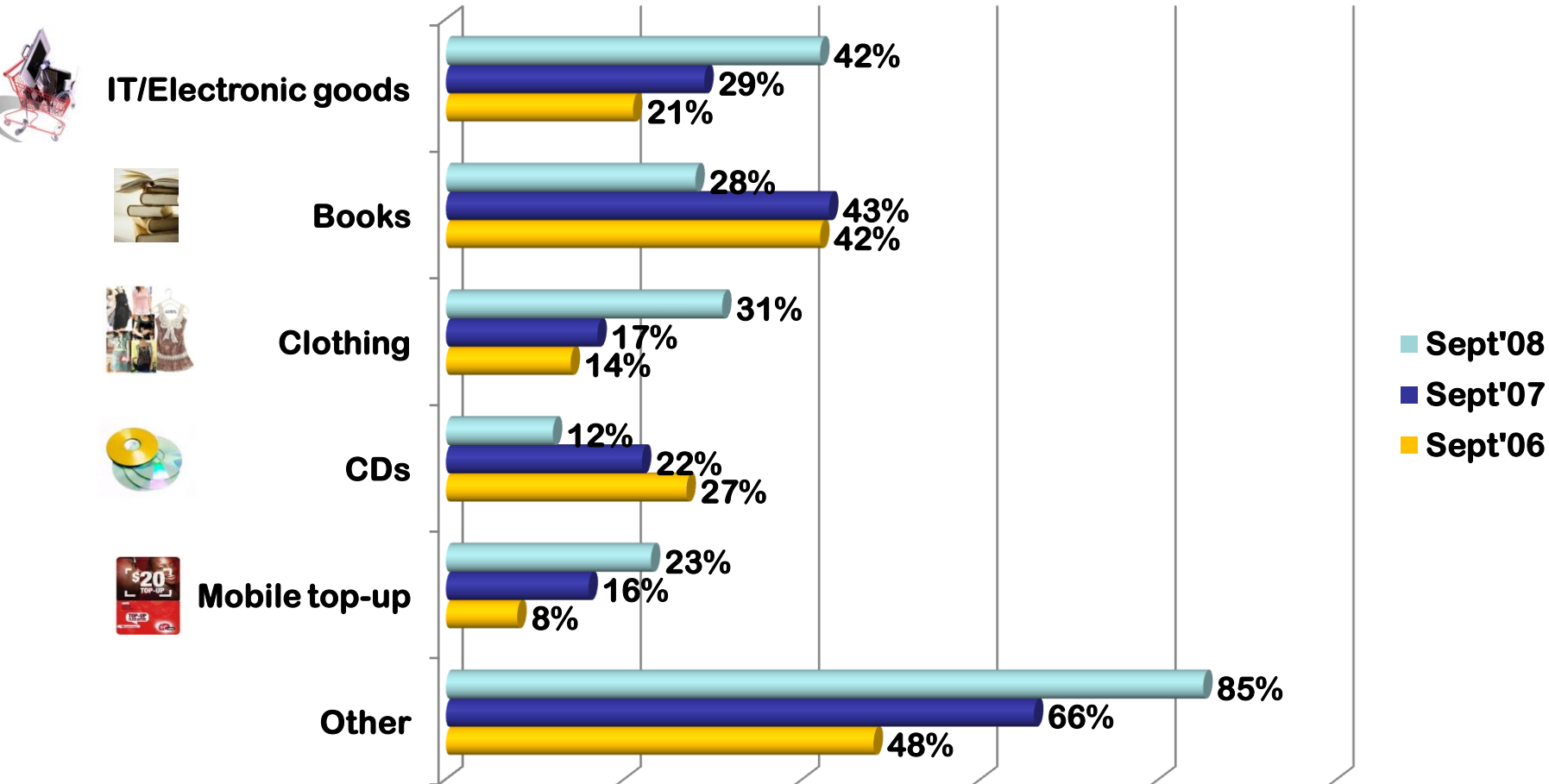
Base: eCommerce users



# Reasons for Buying Online

	Sept'08	Sept'07	Sept'06
Better prices	59%	56%	46%
Convenience	35%	39%	43%
Not available in Malta	22%	24%	15%
Better choice	8%	1%	0%
Faster service / No queues	7%	9%	2%
No time to go shopping / No need to go out	1%	10%	13%

# Items bought online



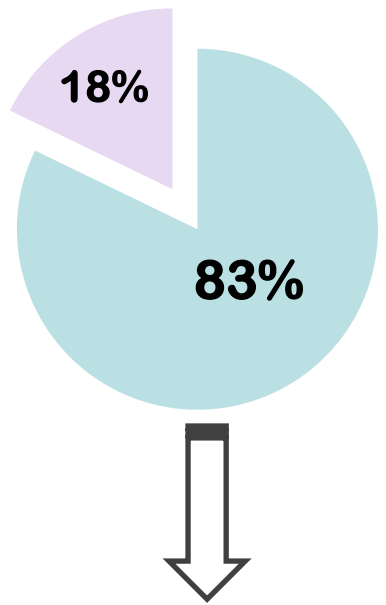
Base: eCommerce users



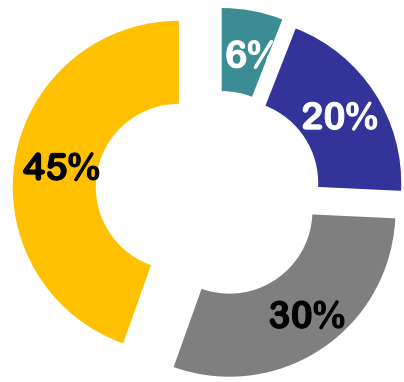
# Purchasing Frequency & Amount Spent



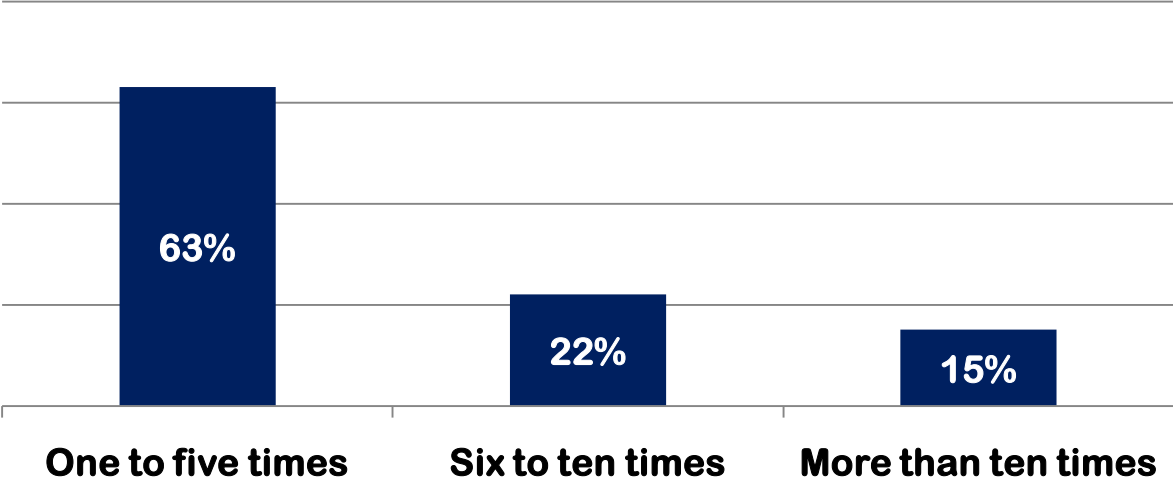
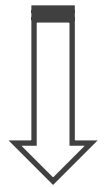
Base: eCommerce users



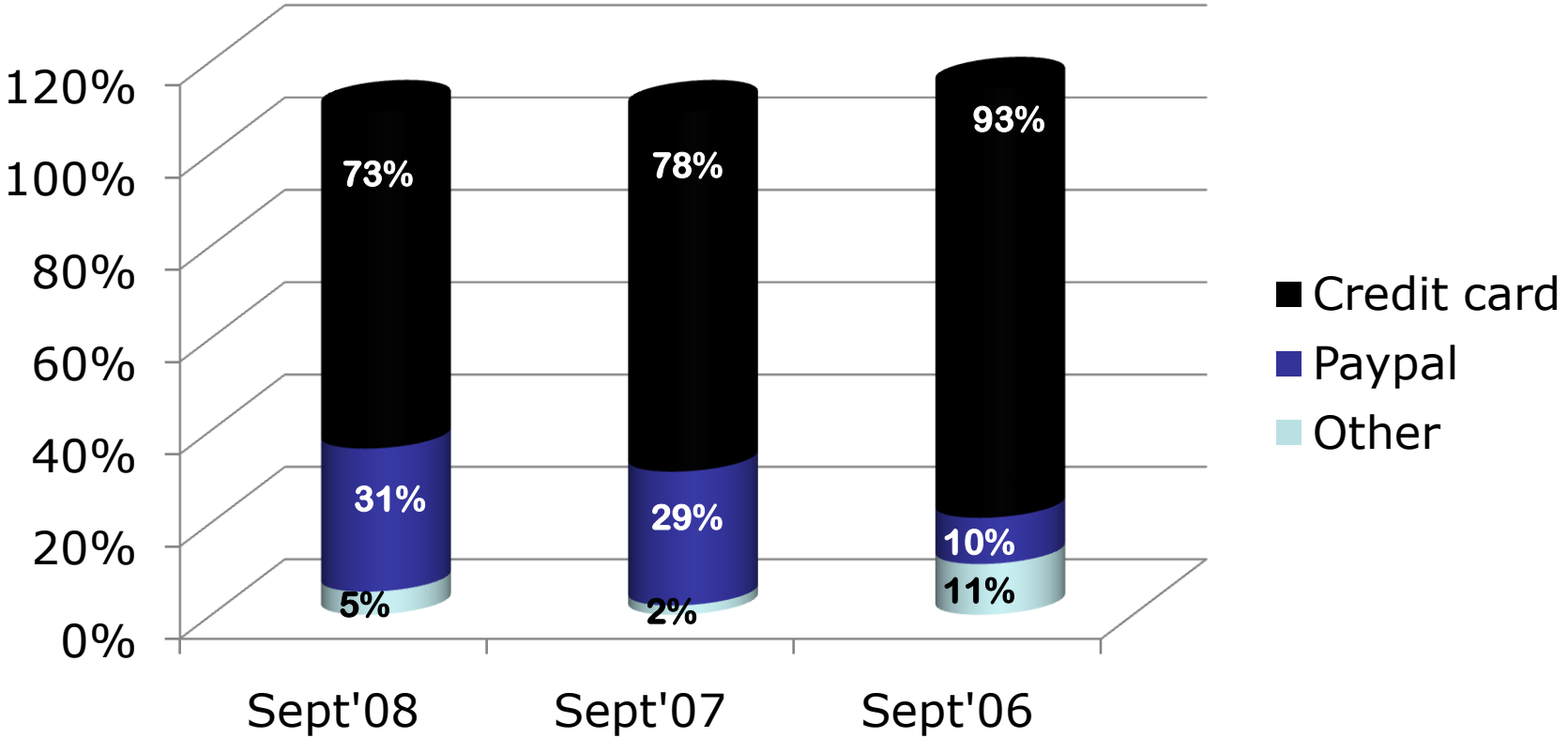
■ Last 6 months  
■ Longer



■ €0-25  
■ €25-60  
■ €60-120  
■ More than €120



# Preferred method of payment

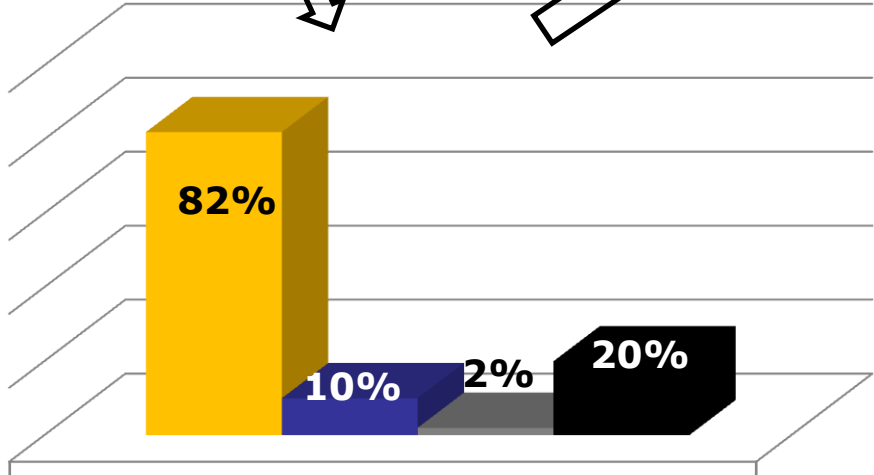
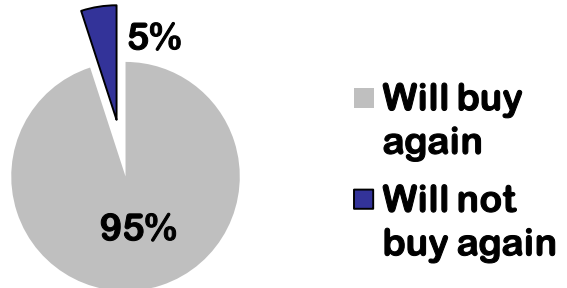
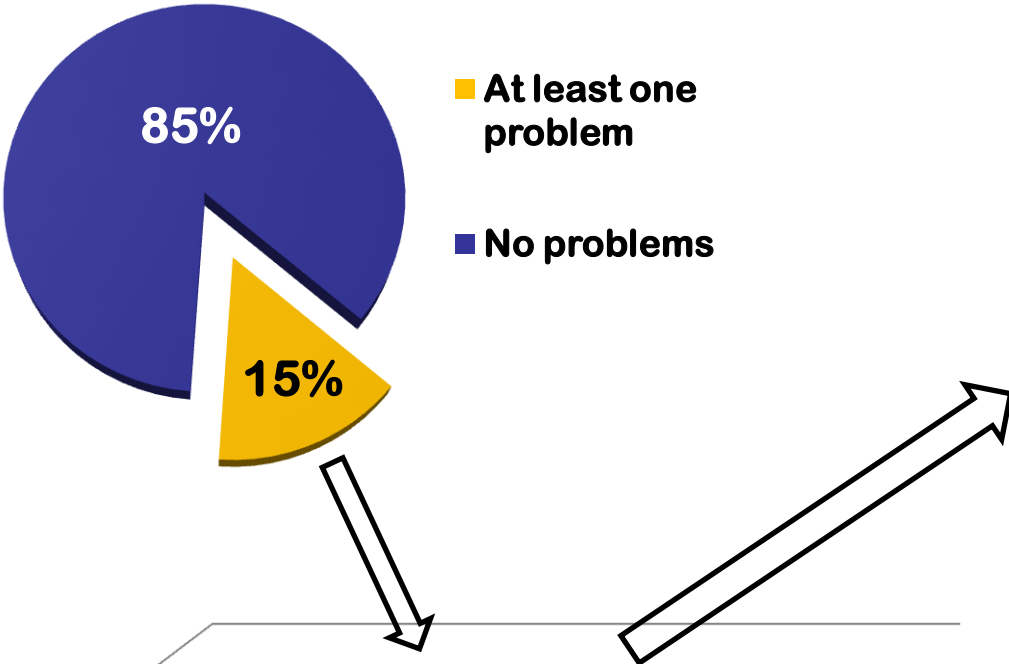


Base: eCommerce users



# Problems encountered

Base: eCommerce users



- Problems related with delivery of goods
- Problems related with payment process
- Internet connection problems
- Other problems



# Security – Precautions & Perceptions



**Secure & Trusted Sites**



**Site Reputation**



**Paypal**



**Security Lock Icon**

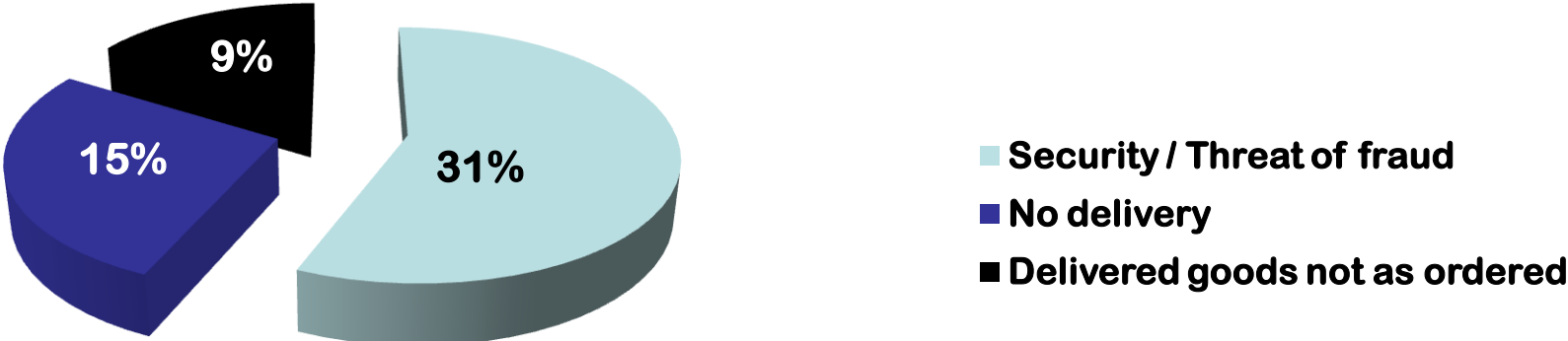


**Low Credit Card Limit**

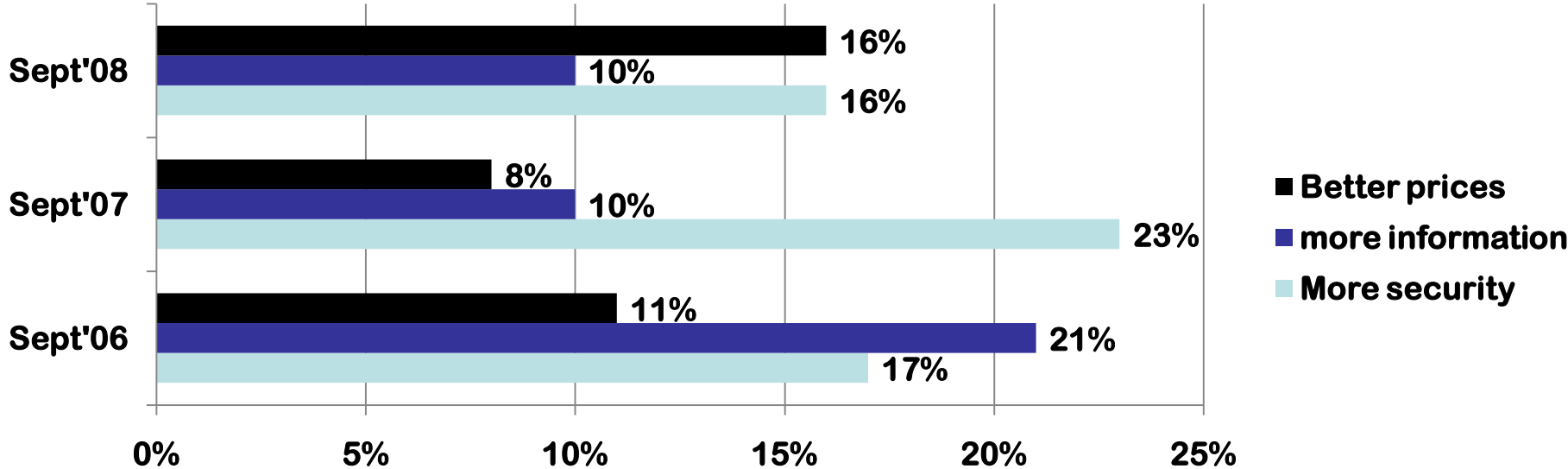


**Reviews**

# Concerns when buying online



# Main motives for buying online



**Thank you for your attention**