

Diffusion and Adoption of Electronic Commerce - What is Switzerland's Position in the International Comparison ?

The International Research Project ECaTT Electronic Commerce and Telework Trends

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ECATT Electronic Commerce and Telework Trends -- Research Design

- 1. General Population Survey**
- 2. Decision Maker Survey**
- 3. Case Studies**

ECaTT General Population Survey Research Methodology -- EUROPE

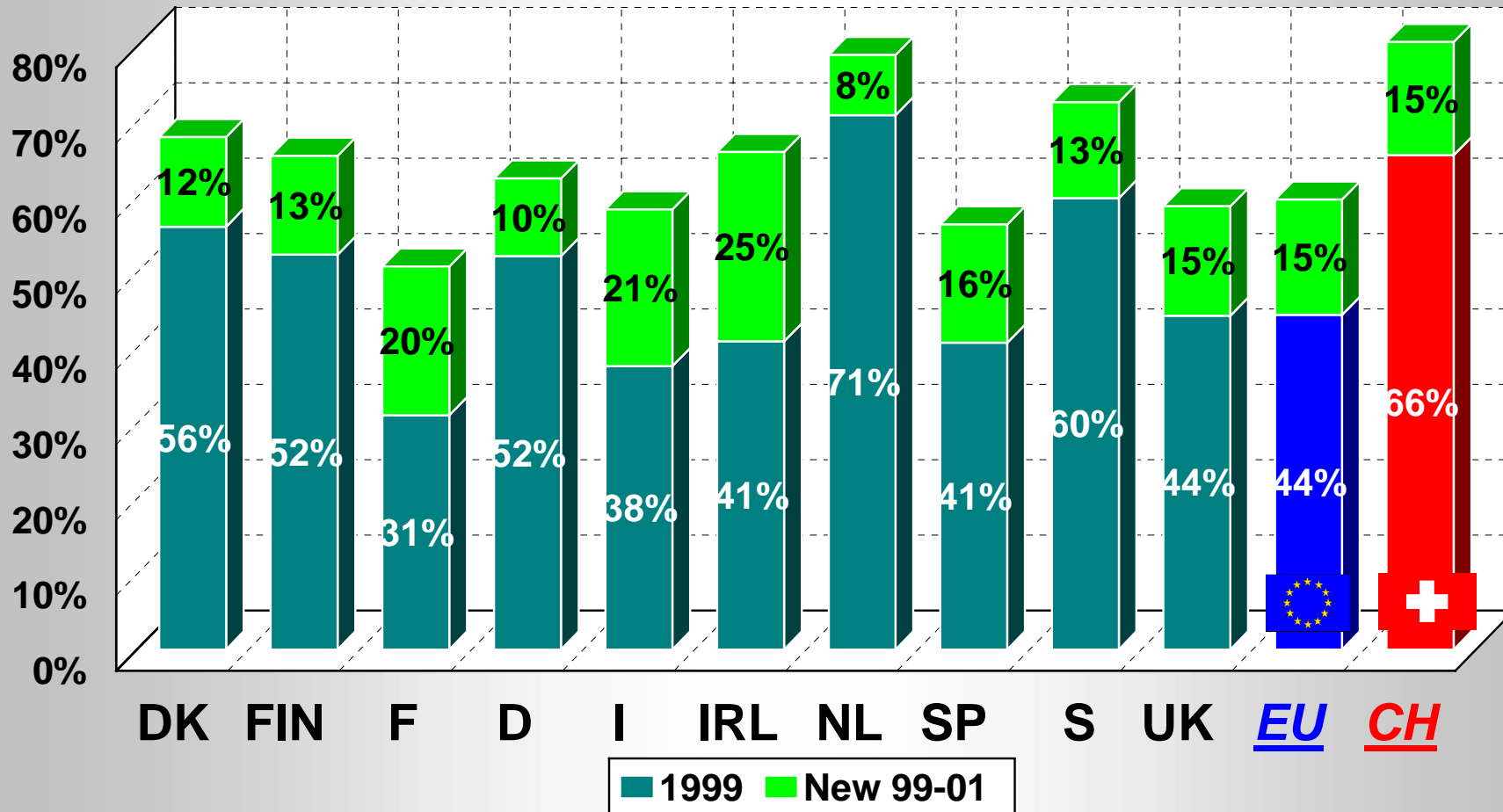
- Representative Cross Section
- Residential Population
- Male and Female
- 15 to 74 Years
- 10 EU Member Countries
- Computer Assisted Telephone Interviews CATI
- 500 or 1'000 in Each Country, *total 7,700*

ECaTT General Population Survey Research Methodology -- SWITZERLAND

- Representative Cross Section
- Residential Population
- Male and Female
- 15 to 74 Years
- German and French Switzerland
- Computer Assisted Telephone Interviews CATI
- *n* = 400, *s* = max. +/- 5 %

Access to PC at Home by 2001 - EUROPE

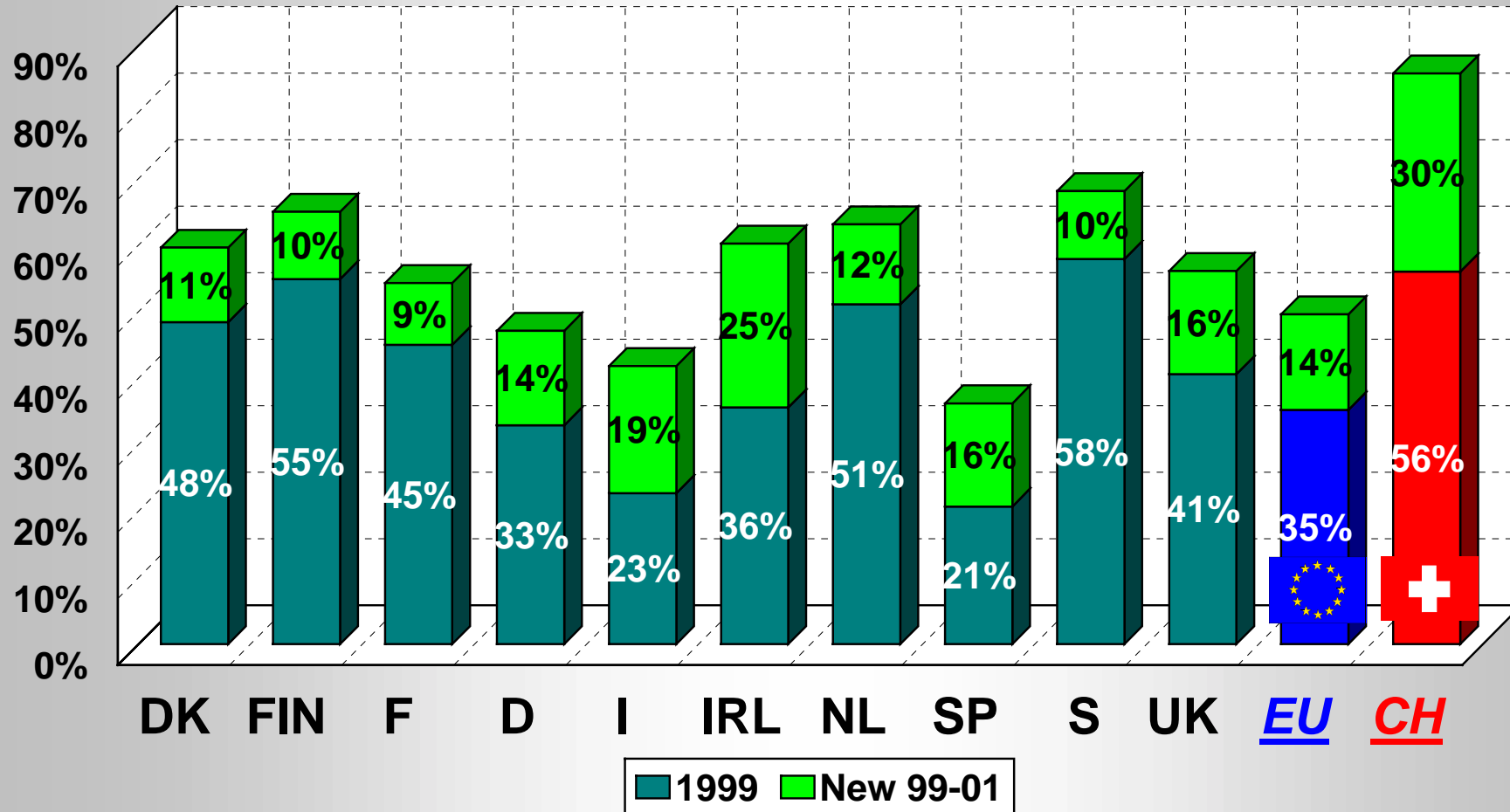
"Is there a PC or other Computer in Your Home ?"



ECATT99/Empirica & WISO Telephone Survey, General Populations Survey,
Base: all, n=7'700/400. EU = weighted mean 10 EU Countries

Internet Users by 2001 - EUROPE

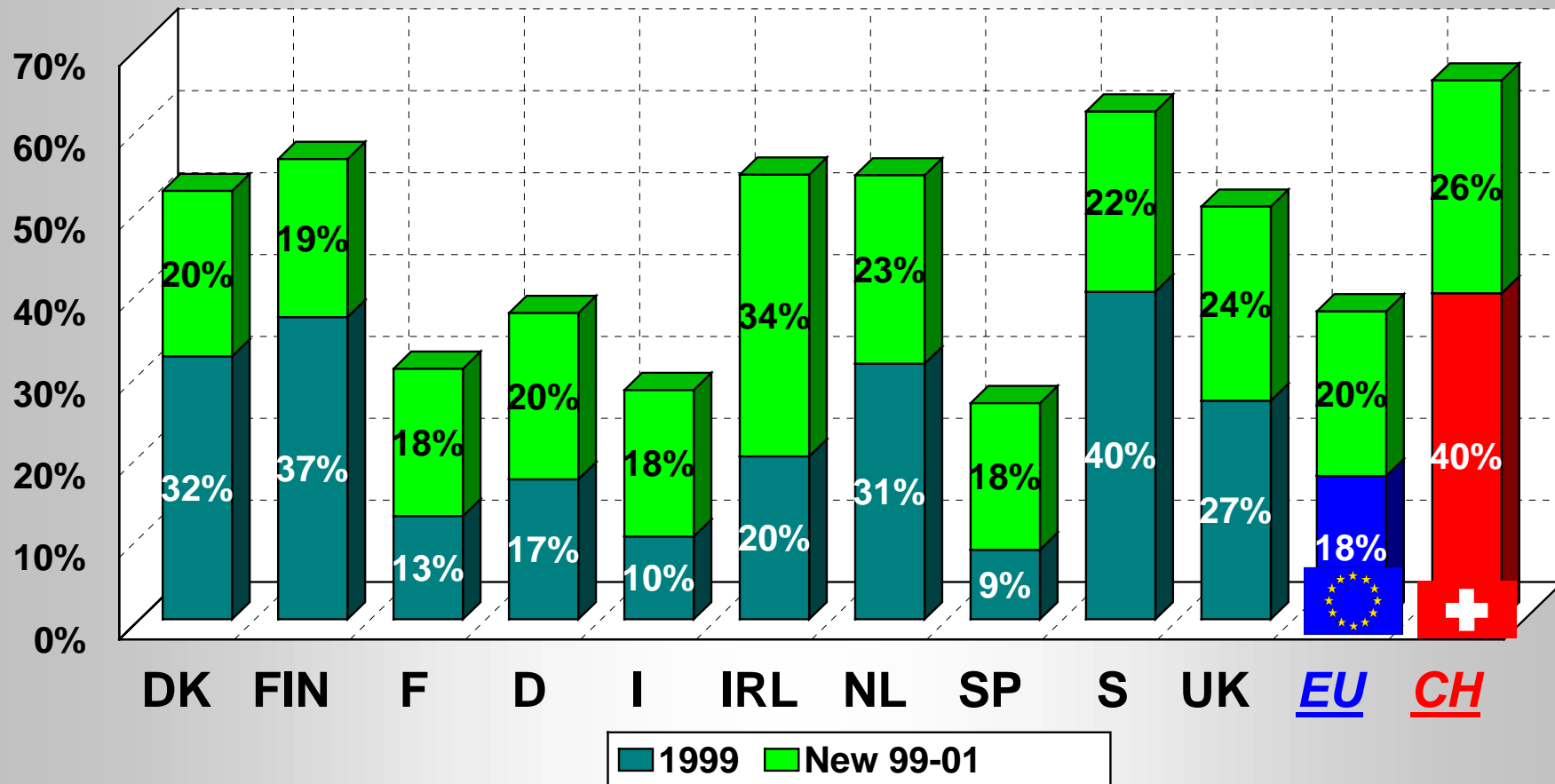
"Did You Ever Use the Internet or Another Online Service ?"



ECATT99/Empirica & WISO Telephone Survey Switzerland, General Population Survey, Base: all, n=7'700/400. EU = weighted mean 10 EU Countries

Use of Electronic Mail by 2001 - EUROPE

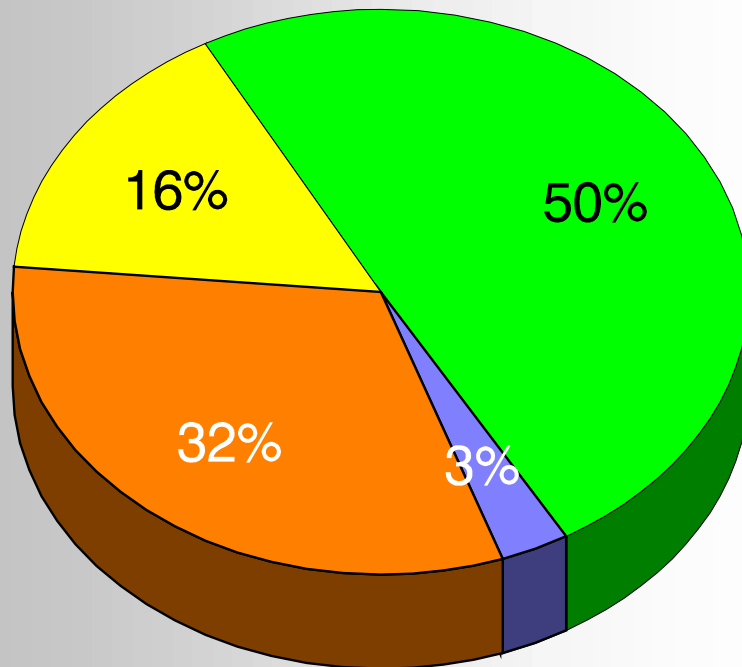
"Received or Sent at Least 1 E-mail During Last Month ?"



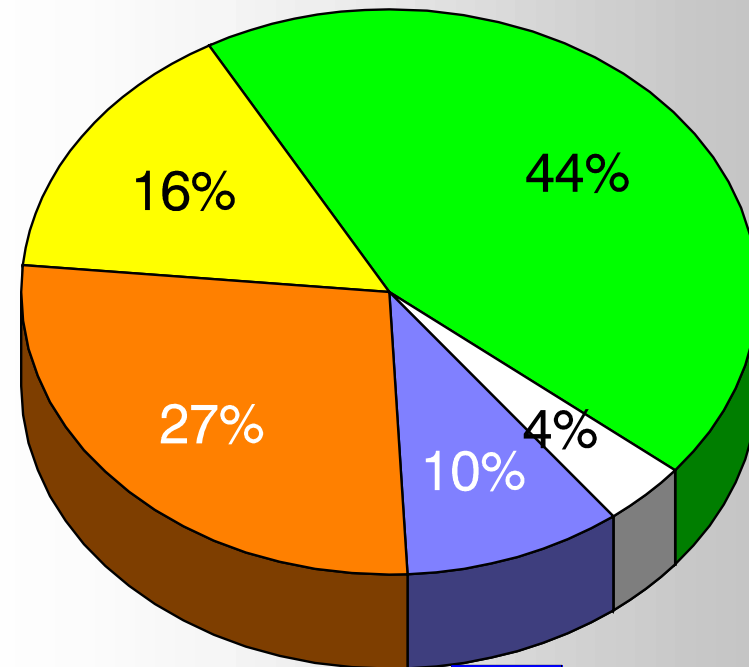
ECATT99/Empirica & WISO Telephone Survey Switzerland, General Population Survey, Base: all, n=7'700/400. EU = weighted mean 10 EU Countries

Payment for Internet Usage 1999 -- EUROPE

"Who is Paying for this Opportunity ?"



CH 



EU 

 Pay Myself  Family  Employer/Other  Free Service  n.a.

ECATT99/Empirica & WISO Telephone Survey Switzerland, General Population Survey, Base: regular users of Internet or other OL-Service (n=1'378/125)

Online Shopping 1999 - EUROPE

"What Domestic Use Have You Ever Made of Online Services ?"

a) Requested Information on:

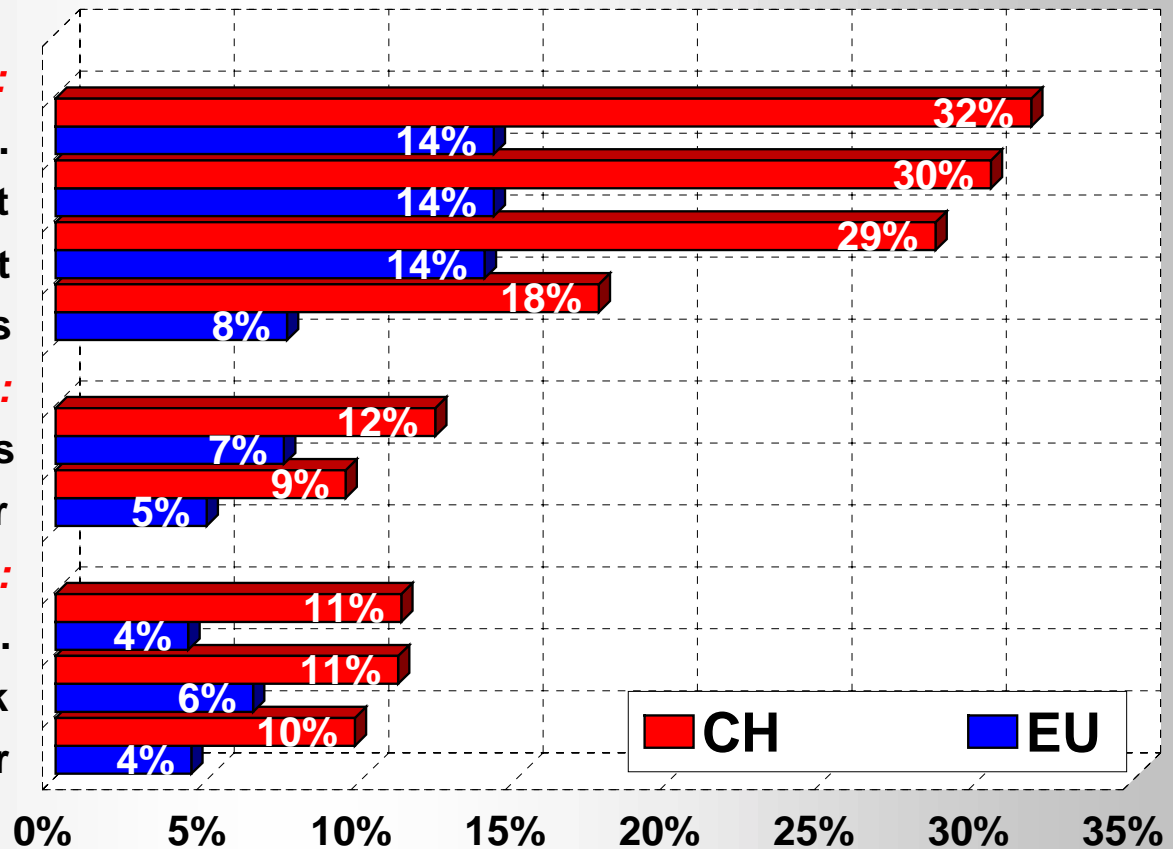
- Travel/Hotel Accomod.
- Supplier of a Product
- Price of a Product
- Availability of Tickets

b) Free of Charge:

- Play Games
- Register Website User

c) Internet Banking:

- Pay w. Acc./Card No.
- Request Info from Bank
- Credit Transfer Order

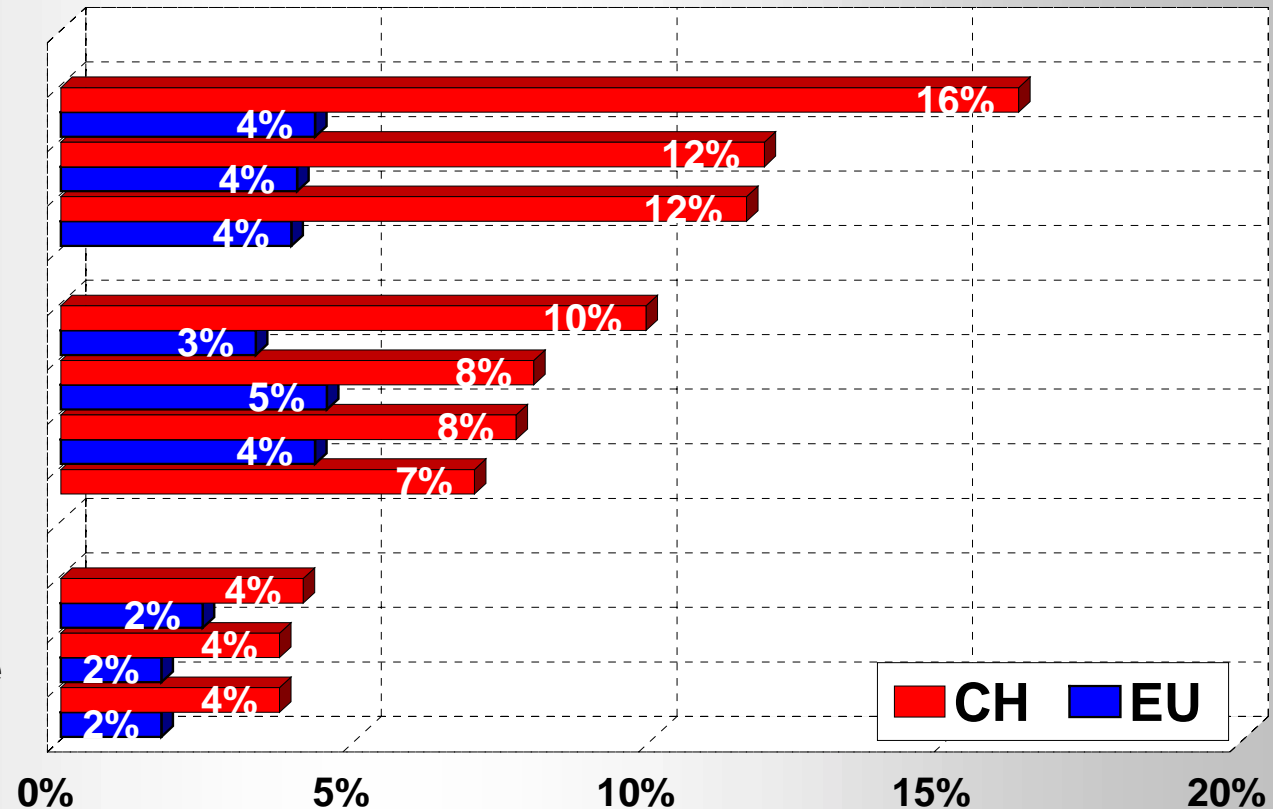


ECATT99/Empirica & WISO Telephone Survey Switzerland, General Population
 Survey, Base: all, n=7'700/400. EU = weighted mean 10 EU Countries

Online Shopping 1999 - EUROPE

"What Domestic Use Have You Ever Made of Online Services ?" (Cont.)

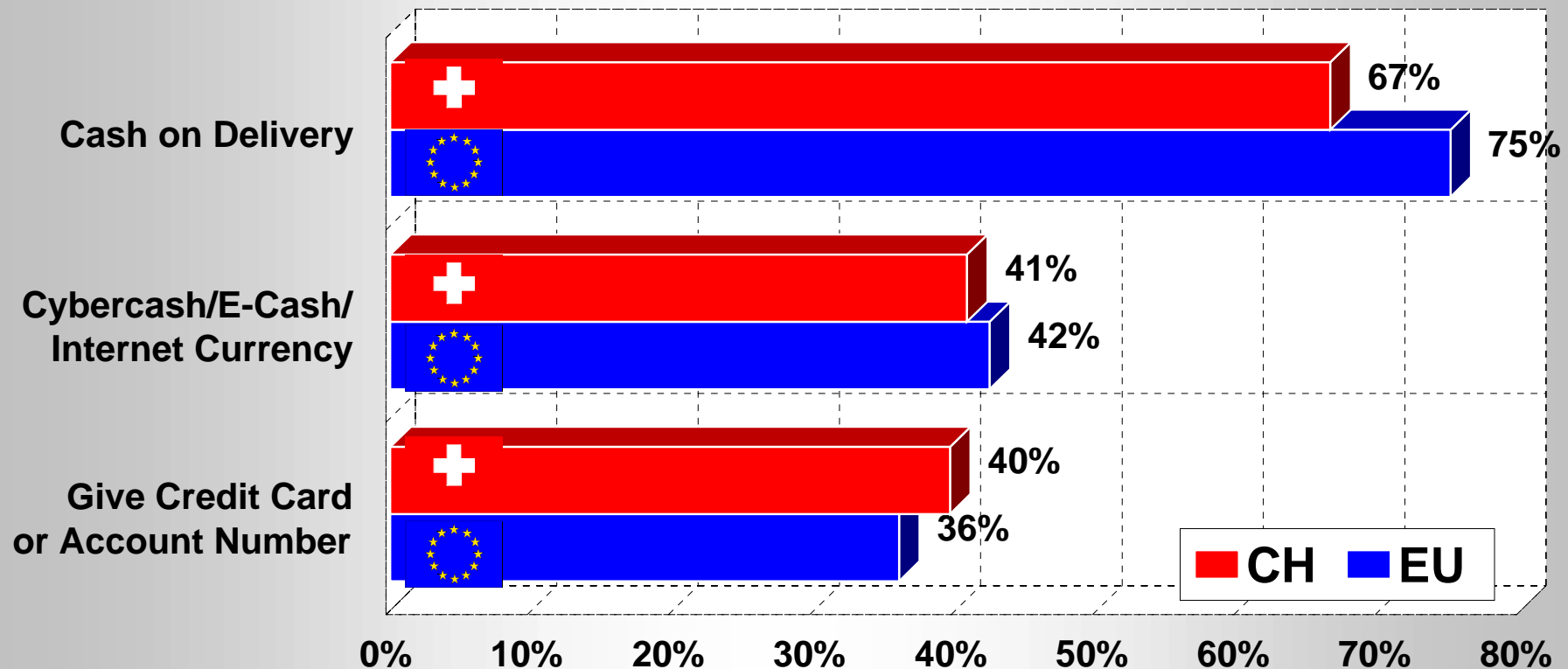
- d) Order With Costs:**
- Book/Brochure/Review
 - Booking Travel/Hotel Acc.
 - PC/Software/CD ROM
 - Booking Cinema/Sports
 - Download Information
 - Music/CD/Video
 - Electric/Electronic Appl.
 - Online Review/News
 - Food/Wine
 - Clothes/Shoes/Textiles



ECATT99/Empirica & WISO Telephone Survey Switzerland, General Population Survey, Base: all, n=7'700/400. EU = weighted mean 10 EU Countries

Payment for Online Shopping 1999 - EUROPE

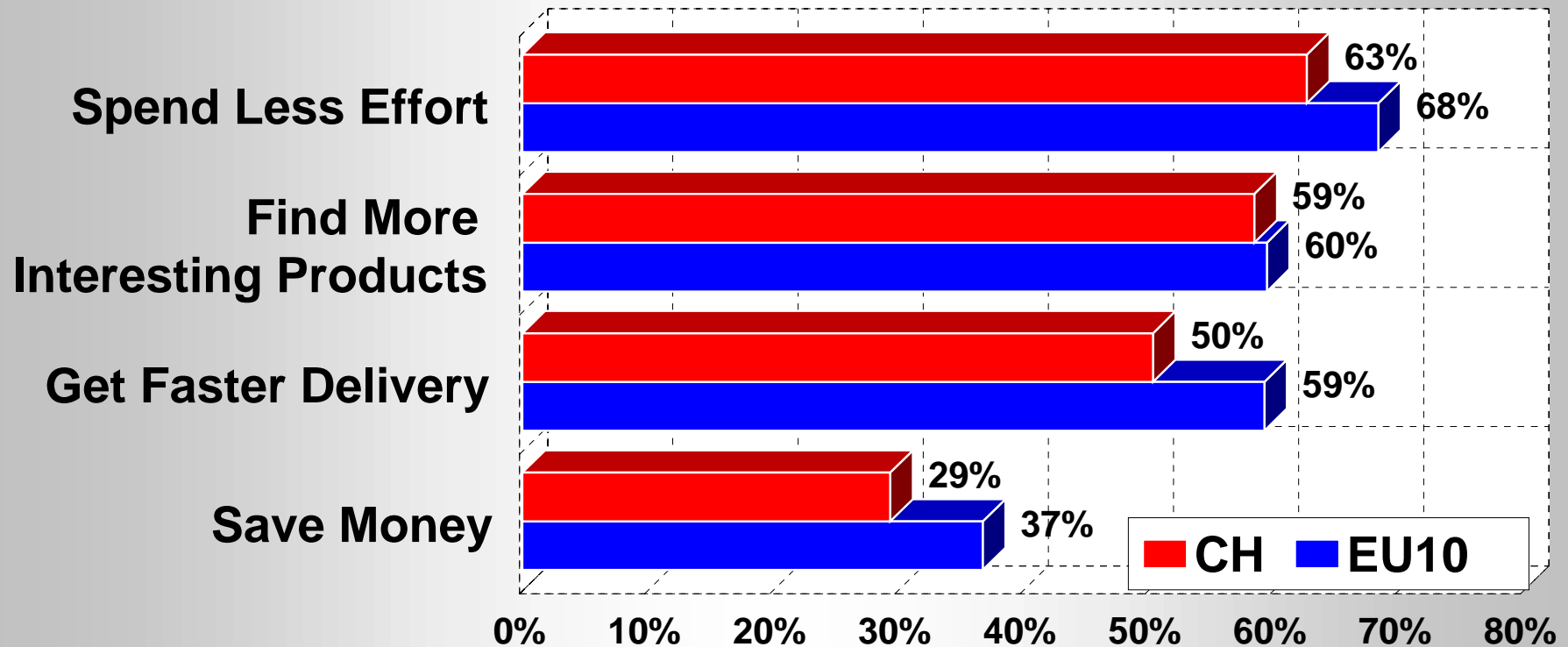
"Would You Accept This Means of Payment for Online Orders ?"



ECATT99/Empirica & WISO Telephone Survey Switzerland, General Population Survey, Base: Used Internet or Interested (n=3'655/245)

Advantages of Online Shopping 1999 - EUROPE

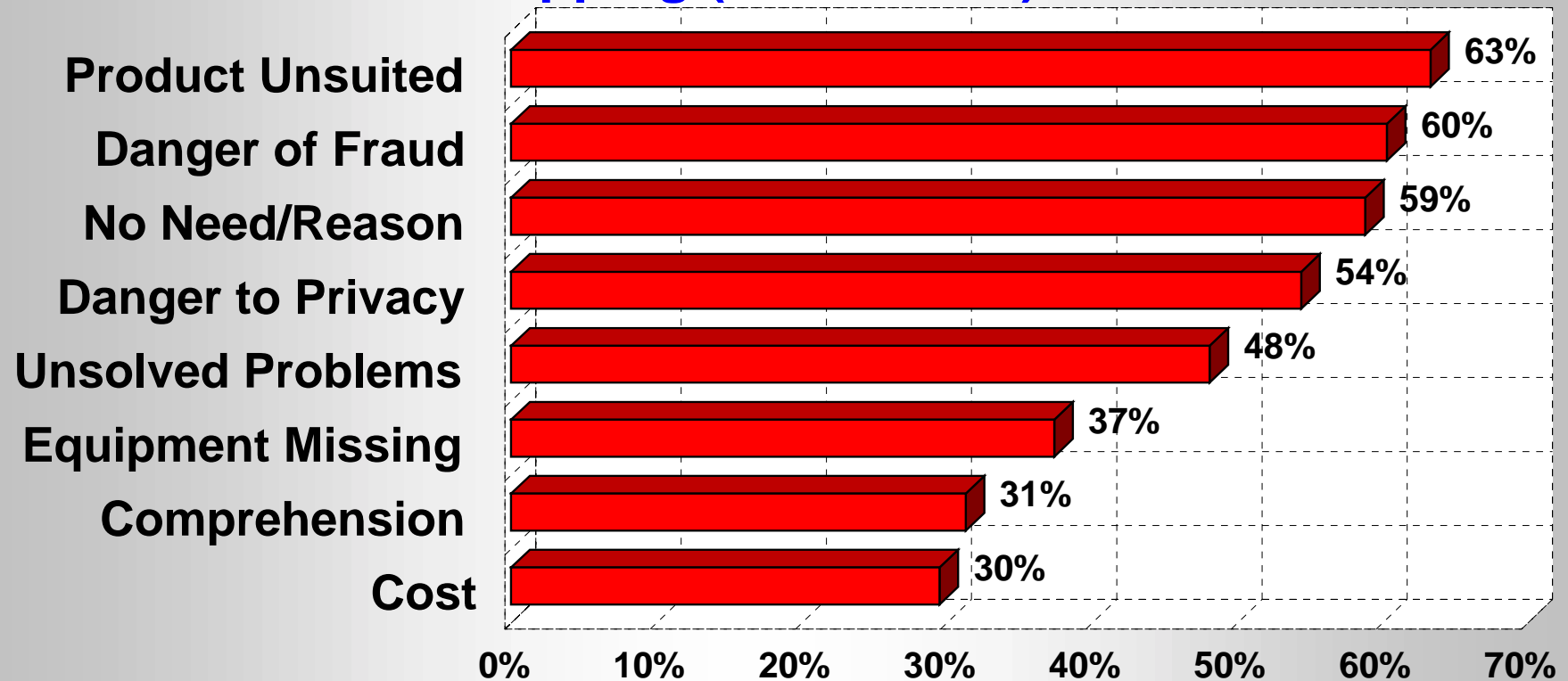
"Using Online Shopping, How Likely Do You Think It Is That You...?"



ECATT99/Empirica & WISO Telephone Survey Switzerland, General Population Survey, Base: Used Internet or Interested (n=3'655/245)

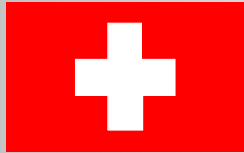
Disadvantages of (Barriers Against) E-Commerce 1999 -- SWITZERLAND

"What Are the Main Reasons for Not Using Online Shopping (More Often) ?"



WISO Telefonumfrage ECATT99 Schweiz, General Population Survey,
Basis: alle, n = 400. Antwort "wichtig"

Disadvantages of (Barriers Against) E-Commerce 1999 - Frequency of Arguments, SWITZERLAND vs. EU10



1. Product Unsuitable
2. Dangers of Fraud
3. Danger to Privacy
4. Equipment Missing
5. Comprehension
6. Cost
7. Other Reasons



- 3.
- 5.
- 7.
- 1.
- 4.
- 6.
- 2.

SUMMARY & CONCLUSIONS

1. *Technical Requirements for the Diffusion of Electronic Commerce Within the Swiss Population Are Well Fulfilled*

Ownership & use of ICT-infrastructure in households, knowledge about and access to PC, Internet and email are widespread. Switzerland is among first ranking countries in Europe.

SUMMARY & CONCLUSIONS

2. Latent "Market Potential" for Electronic Commerce Is, However, Not Yet Fully Exploited.

Further diffusion is hindered and delayed by unsolved problems concerning security, perceived risk and utility of e-commerce in consumers.

SUMMARY & CONCLUSIONS

3. *On Balance: Favorable starting conditions and market potential should be exploited more actively.*

Prerequisites: consumer confidence should be (re-)established; perceived risk and uncertainty of consumers (main concerns: privacy, fraud, data protection) reduced; advantages of virtual shopping and banking more persuasively argued and demonstrated.