

Oliver Wyman and digitalswitzerland are taking the pulse of the Swiss digital readiness for the third year. In June 2019 we asked 2'000 Swiss residents online about digitalization. The respondents are from all age groups, 50% women, 50% men, 25% French & 75% German speaking. We looked at the following 9 different themes: Work, Education, Health, My Data, Media/ News, eDemocracy, Lifestyle, Mobility and Smart Cities.



## Work

The Swiss are very confident about their work outlook

**82%** "I'M TRAINED ENOUGH TO CONTINUE MY JOB IN 5 YEARS"

**74%** "DIGITALIZATION WILL SIMPLIFY MY WORK"

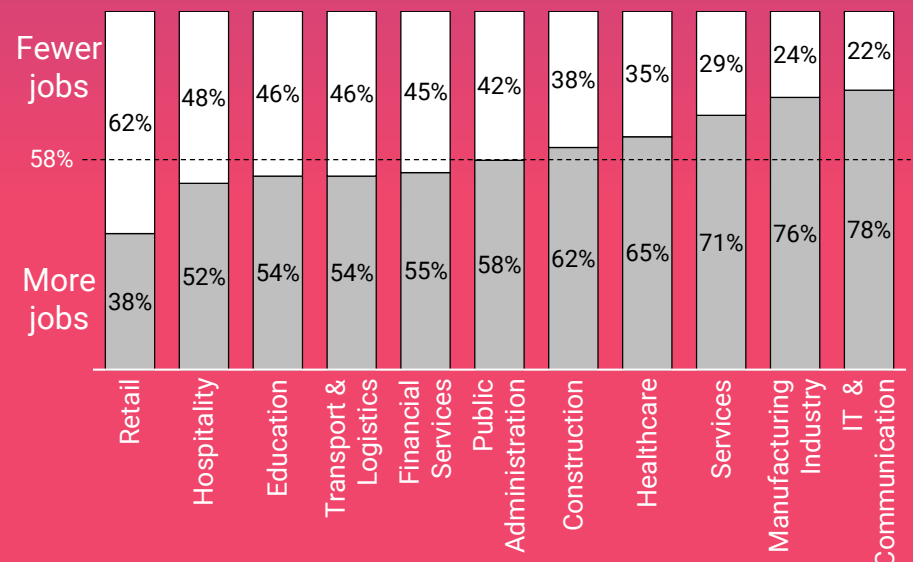
**58%** "DIGITALIZATION WILL CREATE JOBS IN SWITZERLAND FOR PEOPLE LIKE ME"

**20%** "I FEEL LEFT BEHIND AND UNABLE TO KEEP UP WITH THE SPEED OF TECHNOLOGICAL PROGRESS"



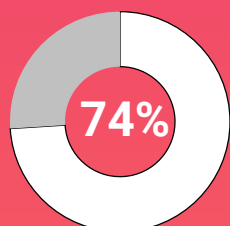
Still a minority feels left behind, the share is higher in the Romandie (28%) than in the German-speaking part (18%)

However, confidence strongly depends on the industry



## Education

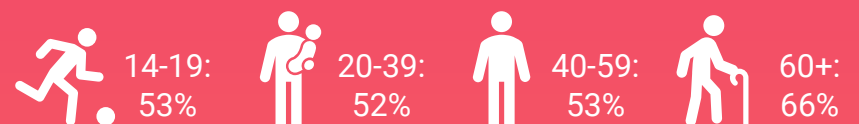
The impact of digitalization on education is seen positively



"DIGITALIZATION SIMPLIFIES LIFELONG LEARNING AND IMPROVES THE LEARNING PROCESS"

People holding a university degree (77%) more positive than people who finished mandatory school (60%)

**55%** "INTERNET AND TECHNOLOGY MAKE YOUNG GENERATIONS MORE CURIOUS AND ACTIVE"

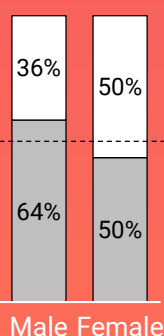


Older generations are more optimistic whether digitalization encourages curiosity and activity



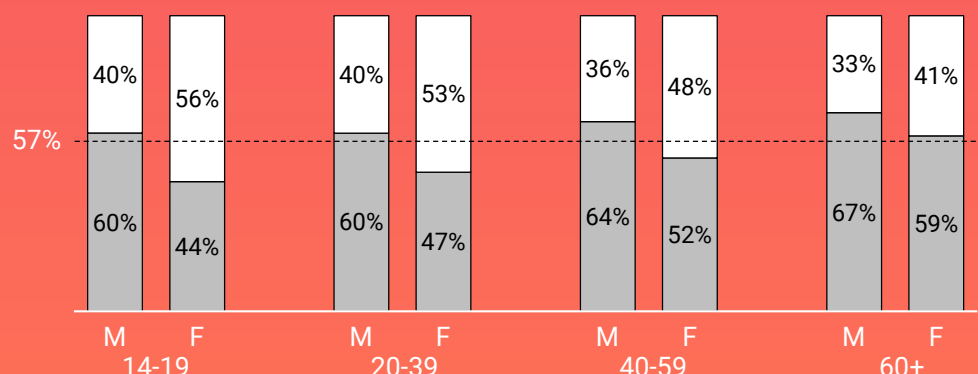
## Health

The topic of health with regards to digitalization is more controversial: Women and younger generations are more sceptical, especially younger women see more disadvantages



**43%** "INTERNET & TECHNOLOGY MAKE ME SICK"

**57%** "INTERNET & TECHNOLOGY HELP ME TO LEAD A HEALTHIER LIFE"





## My Data

Swiss are cautious regarding data in an online context

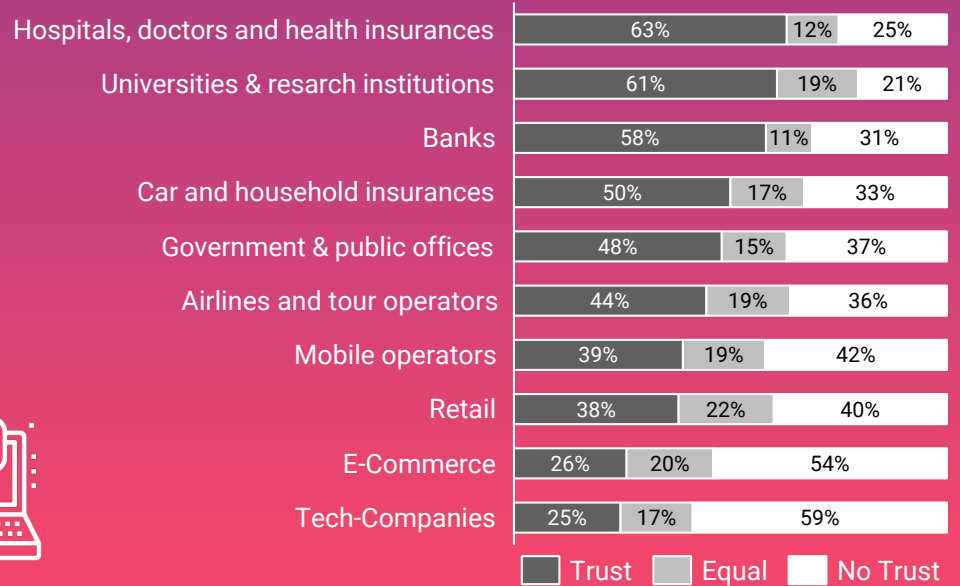
The trust in disclosing personal data in return for personalized services strongly depends on the industry

**67%** "I AM RELUCTANT TO PASS ON PERSONAL DATA TO THIRD PARTIES"

**31%** "I LIKE TO SHARE MY PERSONAL INFORMATION IN EXCHANGE FOR FREE SERVICES"

Swiss are afraid of cybercrime

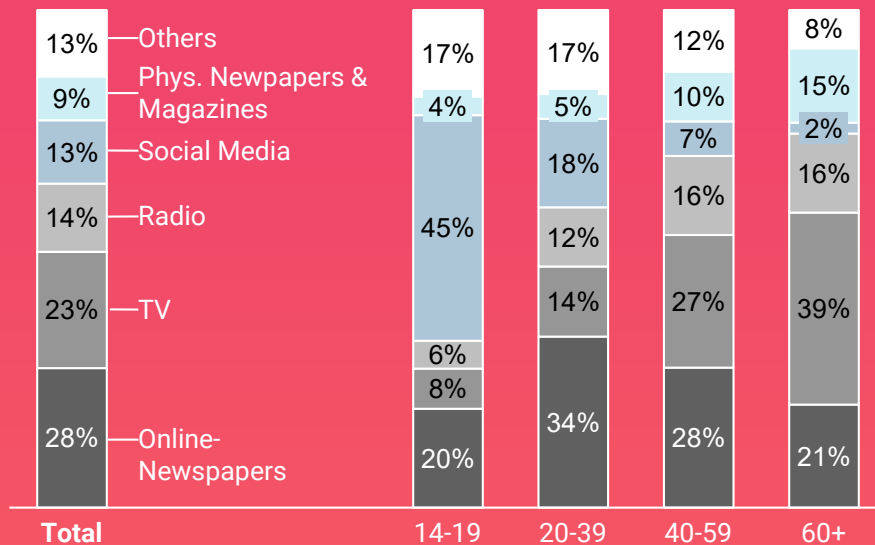
**73%** "INTERNET AND TECHNOLOGY WILL LEAD TO AN INCREASE IN CYBERCRIME"



## Media / News

Type of media consumption highly depends on age

Majority feels that Internet affects news quality



**60%** "INTERNET LOWERS THE CREDIBILITY OF NEWS"



Credibility concerns are smaller for those paying for online-news (49%) than for those who don't (63%)



## eDemocracy

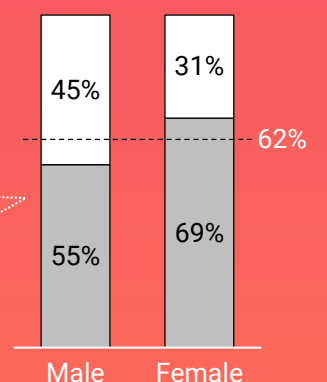
Digitalization has a positive impact on Swiss democracy

At the same time there's a desire for more regulations, women are more in favour of regulations than men

**66%** "DIGITALIZATION IMPROVES CO-DETERMINATION OPPORTUNITIES"



**62%** "MORE REGULATION NEEDED TO CONTROL INTERNET AND TECHNOLOGY"



## DIGITALIZATION: WHAT ARE YOUR HOPES & FEARS?

Find more details of the study on [www.oliverwyman.com](http://www.oliverwyman.com)



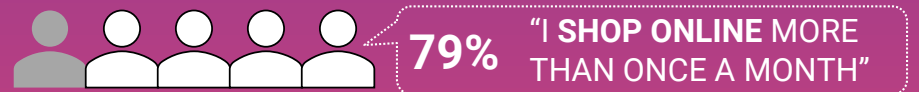
## Lifestyle

Swiss residents are optimistic about the impacts of digitalization, still there are some drawbacks

DIGITALIZATION ...



Shopping behavior is also changing dramatically



**58%** "ONLINE GIANTS WILL DOMINATE THE SWISS RETAIL MARKET"



**82%** "DIGITALIZATION LEADS TO LOWER PRODUCT PRICES"



While sharing economy is still for a minority

**70%** "I DO NOT FEEL COMFORTABLE SHARING MY PROPERTY WITH OTHERS (E.G. CARS, APARTMENTS)"



## Mobility

Digitalization makes mobility easier

**78%** "INTERNET AND TECHNOLOGY SIMPLIFY MY PERSONAL MOBILITY PLANNING"

**67%** "DIGITALIZATION IMPROVES TRADITIONAL SERVICES"



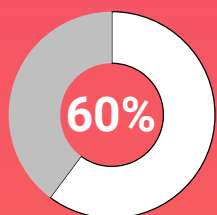
Digitalization connects people not only virtually but also physically



## Smart Cities

Swiss residents are not yet fully convinced of smart city offerings

More than half of the respondents desire more free connectivity



"THROUGH SMART CITY OFFERS, THE OFFER OF **DIGITAL SERVICES** THAT I AM WILLING TO USE INCREASES"

**54%** "THERE SHOULD BE MORE PUBLIC AREAS WITH **FREE INTERNET CONNECTION**"



Urban areas (65%) are more convinced of smart city offerings than other areas (59%), but are more demanding regarding free wifi (57%) than others (53%)

## Contact

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