INTERNET & VSEs/SMEs

Understanding the benefits to trigger the necessary actions

Results of the Réussir avec le Web study

(Sept 2018 - Aug 2019)

afnic

contents

FOREWORD

Supporting the digital transition of businesses in France

As part of its management of .fr, Afnic has set itself the task of helping businesses develop their online presence.

Quite a challenge given that France is lagging behind when it comes to the digital transformation of its VSEs/SMEs, coming in at 15th out of 28*, below the European average.

Overview of the study

In September 2017, Afnic launched a wide-scale study based on self-assessment via its website Réussir avec le Web [Succeed with the Web] aimed at VSBs, VSEs and SMEs.

In August 2019, 2 years after its launch, 6,255 companies had responded to this online questionnaire.

AIM OF THE STUDY: to assess the level of online maturity of VSEs/ SMEs. This was the first study to examine the assimilation of the various dimensions of online presence by companies in France.

3,006 RESPONDENTS BETWEEN SEPTEMBER 2018 AND AUGUST 2019

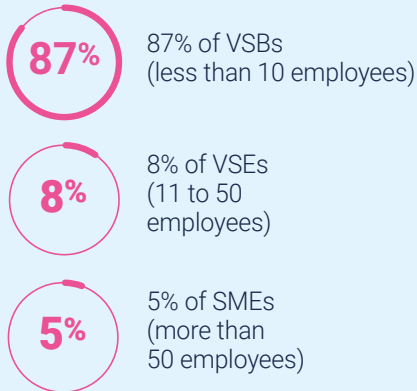### What was the methodology used, you ask?

This second edition was based on a wave of over 3,000 responses collected from a new sample over one year, from September 2018 to August 2019. As with the previous edition, the results were analysed according to the size of the company.

Before going into the details of the results, it is interesting to note that almost half of respondents were start-ups that had launched their business in the last year. This has a clear impact on the data collected.

* 2019 Digital Economy and Society Index (DESI) by the European Commission.

Profiles of responding companies

Among the respondents to the questionnaire:

87% 87% of VSBs (less than 10 employees)

8% 8% of VSEs (11 to 50 employees)

5% 5% of SMEs (more than 50 employees)

These figures correspond to the target audience of the Réussir avec le Web offer.

While the breakdown by sector should be taken with caution, we found that these companies are **essentially related to the Consulting, Communication, Digital, Fashion, culture, entertainment and leisure.**

Conversely, few responses to the questionnaire were received from the Banking - Finance - Insurance, animals and humanitarian. Three interpretations are possible: the Réussir avec le Web offer is of no interest to them; the sectors in question depend little on the internet; or, on the contrary, they already have an outstanding grasp of the network. Whatever the case, these sectoral data will be the subject of further studies or publications.

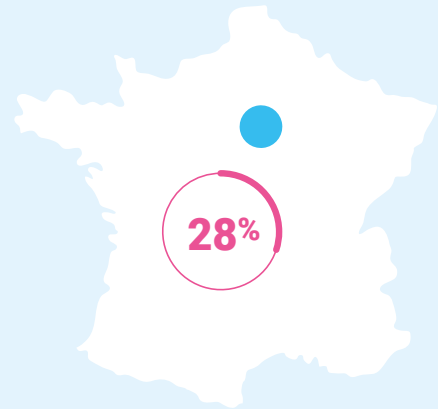### ACCORDING TO SECTOR

ACCORDING TO SIZE

39% of the businesses were **three years old** or more at the time of answering the questionnaire. Quite logically, these are the largest structures in terms of personnel (VSE / SME)

20% of the companies had already been in business for **one to three years**

41% were less than **a year old**

ACCORDING TO SENIORITY

28%

A large proportion of the respondents (more than 28%) were **logically located in Ile-de-France,** the main employment area in France.

For the rest, the results depended on the initiatives taken to raise awareness about the *Réussir avec le Web* system in the other regions of France.

For this reason, the results cannot be interpreted because they do not correspond to the real weight in terms of the economy or the number of companies in these regions.

ACCORDING TO REGION

FOR THOSE IN A HURRY...

...here is what to remember from the study.

Being present on the internet has become essential for businesses today.

.FR is the undisputed leader whatever the size of the company.

The human and financial resources devoted to the internet remain globally modest. The return on investment is poorly perceived.
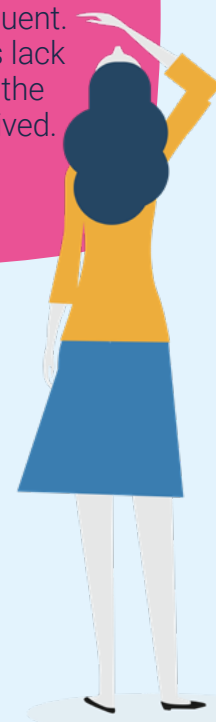
The three main reasons put forward by companies for their online presence are: **to introduce themselves, to be found, to communicate.**

If a majority of **respondents have their domain names**, a significant proportion seem relatively unaware of how to manage their identity on the internet.

Once they have a website and/or pages on social networks, **respondents tend to wait passively for prospects to come forward**. "Active measures" are too infrequent. Either because the respondents lack knowledge, time or means, or the benefits are often poorly perceived.

Almost all of the respondents are present on social networks, Facebook, LinkedIn and Twitter in particular. On the other hand most consider that the time invested is wasted. Two thirds of companies display their social networks on their websites.

The content published on websites **mainly concerns presentations** of the respondents and their offers, as well as their contact details. A minority uses contents such as blogs, testimonials, etc.

Like visibility and e-reputation, **SEO is neglected or managed in a low-tech way**. The priority is "free" organic SEO.

Most of the respondents do not have a publication schedule for the social networks. Either because there is no value-added content to publish, or because there are no resources available, news, inspiration, etc.

Visibility and e-reputation issues seem to have major potential for improvement. For example, advertising to create site traffic or online customer satisfaction ratings are well identified among the arsenal of tools available. But they remain relatively little used.

Companies equally use websites and social networks for their internet presence.

Almost three out of four respondents do not update their sites more than once a week.

The content remains equally as simple as their formats: **texts and images in almost all cases.** Videos are rarer because more costly and time-consuming.

Significant proportions of the respondents indicate that they **do not build customer databases through the internet,** nor do they check the effectiveness of their loyalty initiatives.

Contact forms and emailing (especially for SMEs) are the two main business development tools used on the internet.

RESULTS OF THE STUDY
2018/2019

The results are presented here according to the different steps addressed in the questionnaire

They cover all the essential items of a "good" online presence.
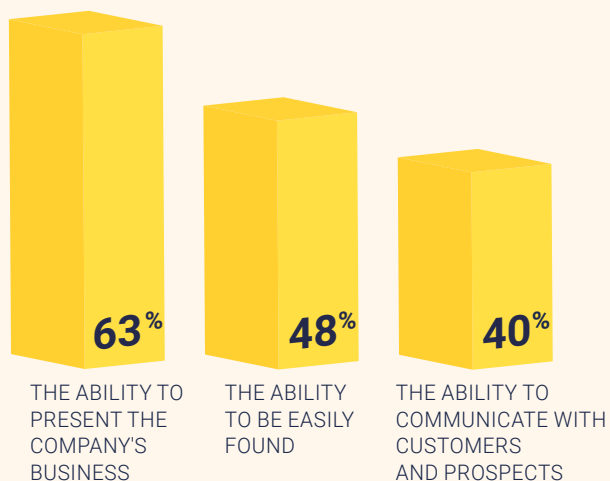
1- Online presence

Presenting the company's business on the Web: a necessity well understood

The vast majority of respondents (92%) have understood the need to be present on the internet. If they do not all consider it to be indispensable, they at least consider it to be useful for their business.

92%
CONSIDER THEIR PRESENCE ON THE INTERNET ESSENTIAL OR USEFUL TO THEIR ACTIVITY

The **top three expectations** related to online presence include:

63%
THE ABILITY TO PRESENT THE COMPANY'S BUSINESS

48%
THE ABILITY TO BE EASILY FOUND

40%
THE ABILITY TO COMMUNICATE WITH CUSTOMERS AND PROSPECTS

Note that among SMEs, the ability to communicate with customers and prospects comes in second place with 52%.
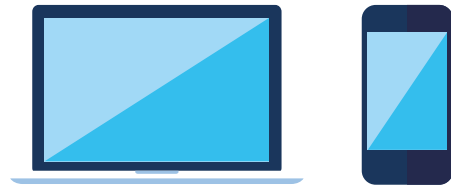
The possibility of selling online, is also cited by 36% of the respondents but it depends on the company's activity.

Social networks slightly more used than websites in 2019

69%
WEBSITES

76%
SOCIAL NETWORKS

Presence on the internet today equally involves websites (69%) and social networks (76%). But the figures vary according to the size of the company.

SMEs tend to acquire a website more frequently (84%) and to use third-party sites for SEO purposes (28%).

On the other hand, the presence on social networks does not **vary according to the size** of the company, any more than the wish to sell online.

26% of the companies report selling products and services via their websites.

2- Investments and gains

Modest investments

For company managers, the problem often lies in finding a compromise between the financial (or human) resources to be allocated to their online presence and the expected benefits.

The majority of respondents, 63%, spend less than €300 a year on their online presence. 24% invest between €300 and €1000. Only 9% spend more than €1,000 on their internet presence system. Here again, the size of the company is a major factor. If only 5% of VSBs invest more than €5,000 per year, the figure increases to 34% for SMEs.
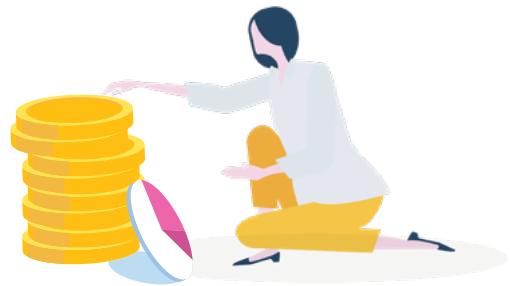
Time spent on internet presence

45% 1hr PER DAY

17% 1hr PER MONTH

32% 1hr PER WEEK

7% 1hr PER YEAR
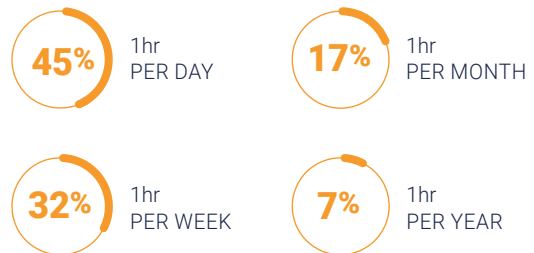
Regarding the time spent managing online presence, 55% of respondents say they spend less than one hour a day. 24% spend less than one hour per month.

These percentages reach respectively 61% and 27% for VSBs and 51% and 23% for SMEs.

63% LESS THAN €300 A YEAR

24% BETWEEN €300 AND €1000 A YEAR

9% BETWEEN €1000 AND €5000 A YEAR

5% MORE THAN €5000 A YEAR

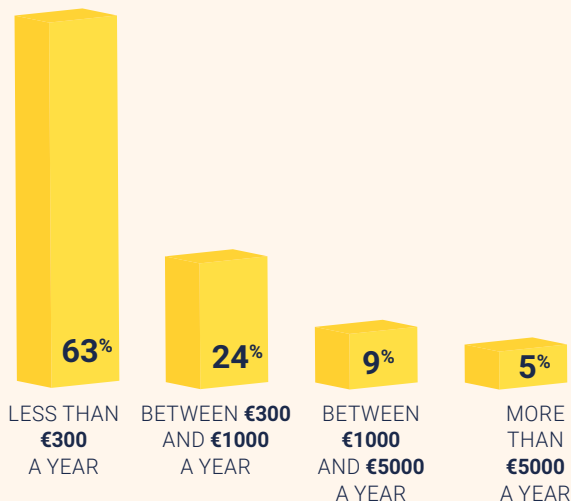## A return on investment difficult to quantify

60% of respondents do not know how much of their turnover is generated via the internet or think that it only contributes to a marginal degree.

These proportions are respectively 56% for VBSs and 68% for SMEs. Why the discrepancy?

It may be that SMEs are much less dependent on the internet in realizing their turnover. Only 14% of them make more than 30% of their turnover on the internet. Which is the case for 27% of VBSs.

Percentage of turnover achieved through the internet

29%	29%	17%	17%	9%
LESS THAN 10%	DO NOT KNOW	10 TO 30 %	MORE THAN 50 %	31 TO 50 %
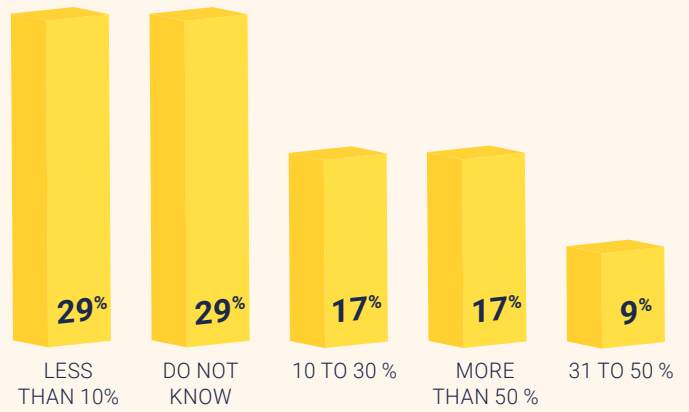
3- Identity management

A majority of custom domain names

88% of respondents say they have their own domain name.

12% of companies use their provider's domain name for their website (i.e: www.mycompany.myprovider.fr)

These proportions are 94% and 6% for SMEs and 86% and 14% for VBSs.

Among the Top Level Domains chosen for their websites, **the .FR (51%) and the .COM (42%) are the two undisputed leaders.** The other TLDs (.net, .org, etc.) are highly marginal.

.FR is the undisputed leader whatever the size of the company.
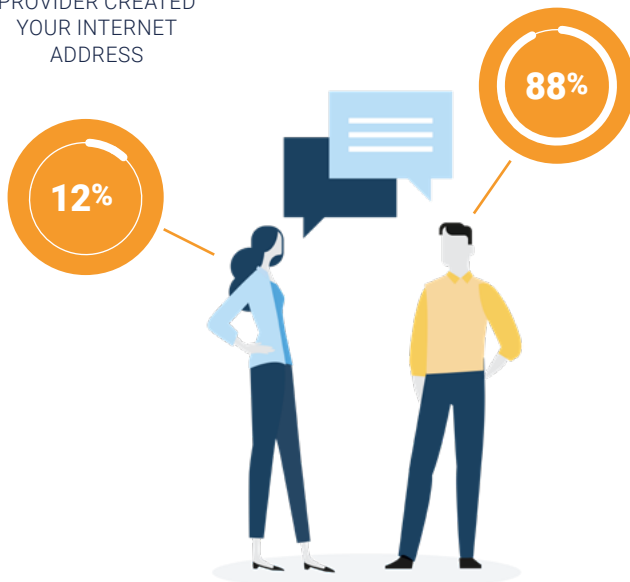
TYPES OF INTERNET ADDRESS

YOU HAVE YOUR OWN DOMAIN NAME

YOUR WEBSITE SITE PROVIDER CREATED YOUR INTERNET ADDRESS

88%

12%

TYPES OF TOP LEVEL DOMAINS

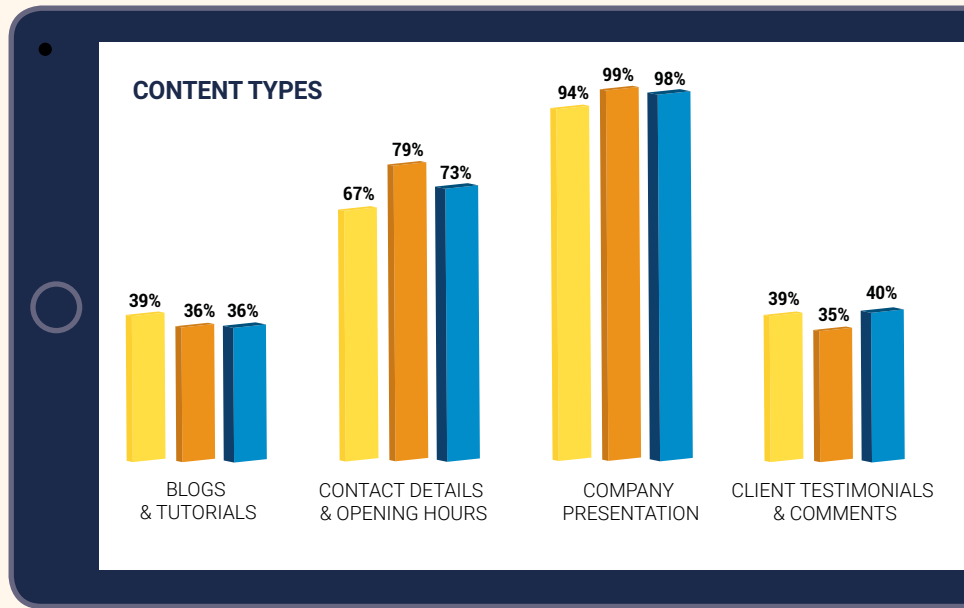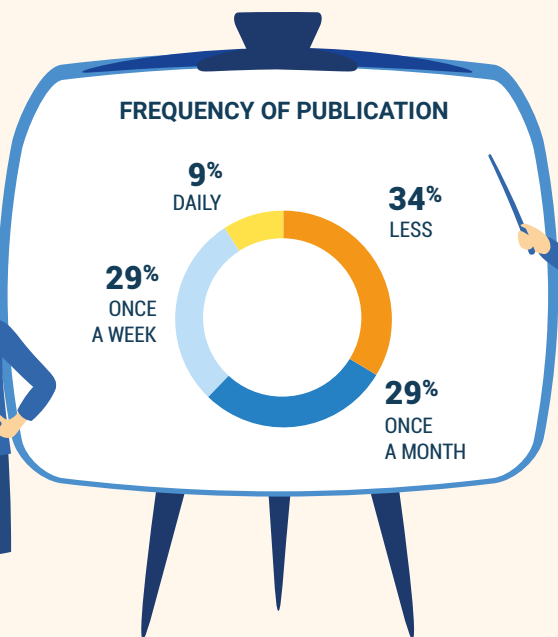| .FR	51%
.COM	42%
Others	7%

4- Original content

A minority use testimonials and blog posts

Almost all (95%) of the respondents provide a presentation of their company on their website, with products, services, etc. Next are contact details and opening times (68%). Only a minority (39%) use "value-added" content such as blog posts or testimonials.

Regarding the formats, here again the contents remain simple. Text (97%) and images (95%) are commonplace but video is more rarely used (38%). Which probably remains a question of means: 58% of SMEs say they publish videos, but only 36% of VSBs do so.

CONTENT TYPES

	BLOGS & TUTORIALS	CONTACT DETAILS & OPENING HOURS	COMPANY PRESENTATION	CLIENT TESTIMONIALS & COMMENTS
VSB	39%	67%	94%	39%
VSE	36%	79%	99%	35%
SME	36%	73%	98%	40%

- ● VSB
- ● VSE
- ● SME

Publication regularity according to human and financial resources

FREQUENCY OF PUBLICATION

- 9% DAILY
- 34% LESS
- 29% ONCE A WEEK
- 29% ONCE A MONTH

62% of the respondents update their websites less than once a week and 9% do so every day.

These proportions are 63% and 9% for VSBs and 45% and 19% for SMEs. Here again there is the effect of size and therefore of human and financial resources.

A majority of respondents (82%) said that their sites were mobile-friendly but 13% said they did not know.

These results can be summarized as follows: publishing original content on a regular basis requires having something to say ... and someone to say it. Which does not always correspond to the means or the culture of the companies.

5- Social networks

An investment considered inevitable but unprofitable

As previously stated, social networks are close to websites as the preferred media for businesses on the internet. Yet 77% of respondents do not consider the time invested on social networks as "profitable" for their business.

71% say they have connected their websites to their pages on social networks.

Facebook unbeatable

The social networks most used by companies are Facebook (90%) and LinkedIn (48%). Practices, however, are related to size: 90% of VSBs are on Facebook against 85% of SMEs, and 46% of VSBs are on LinkedIn against 76% of SMEs.

These contrasts are also found on Twitter (respectively 25% and 61%) and YouTube (19% and 48%). Notably, VSBs use Instagram more than SMEs (49% vs. 34%).

73% of the companies surveyed said they have not set up a publication schedule (74% of VSBs and 52% of SMEs) when 27% have one (26% of VSBs and 48% of SMEs).

Facebook (90%) and LinkedIn (48%) are the most used social networks

in 48 %   **f** 90 %   **Instagram** 28 %

	FACEBOOK	LINKEDIN	INSTAGRAM	TWITTER	YOUTUBE
VSB	90%	46%	49%	25%	19%
VSE	75%	50%	28%	41%	30%
SME	85%	76%	34%	61%	48%

● VSB   ● VSE   ● SME
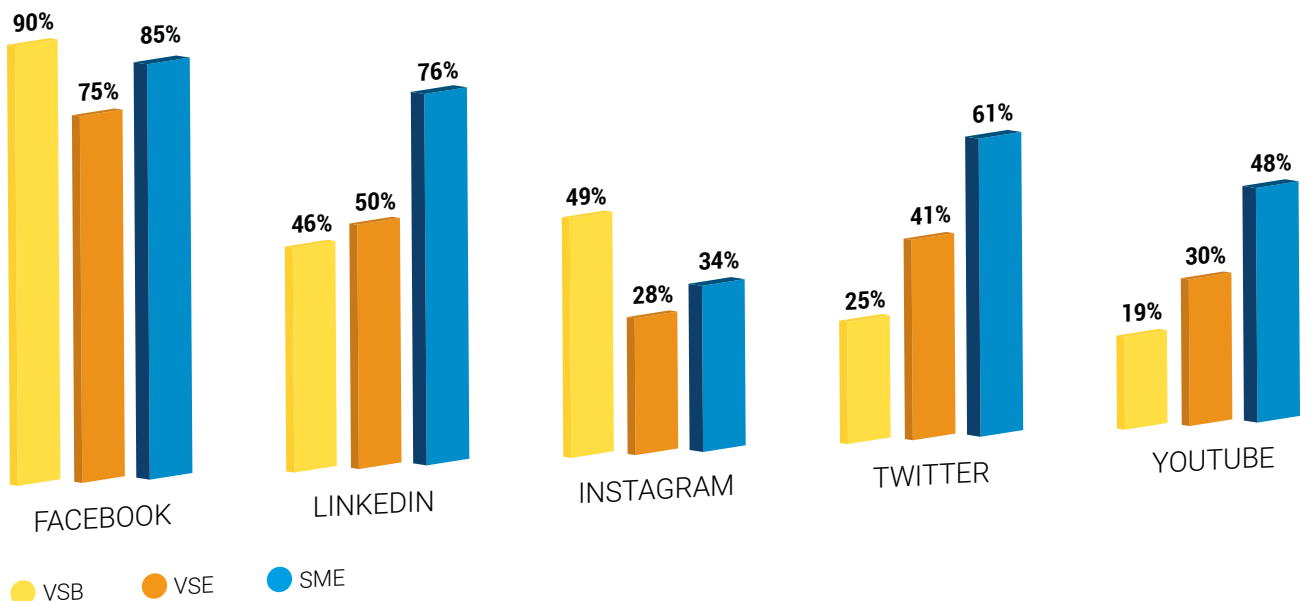
6- Business Development

30% of respondents do not take any sales development action

Some companies have developed specific tools to create, maintain and enhance a customer base via the internet.The contact form is the most popular sales development tool, used by 48% of the respondents. Then comes the emailing with 31%. But it is less used by VSBs (30%) while SMEs use email a great deal (55%, in front of contact forms).
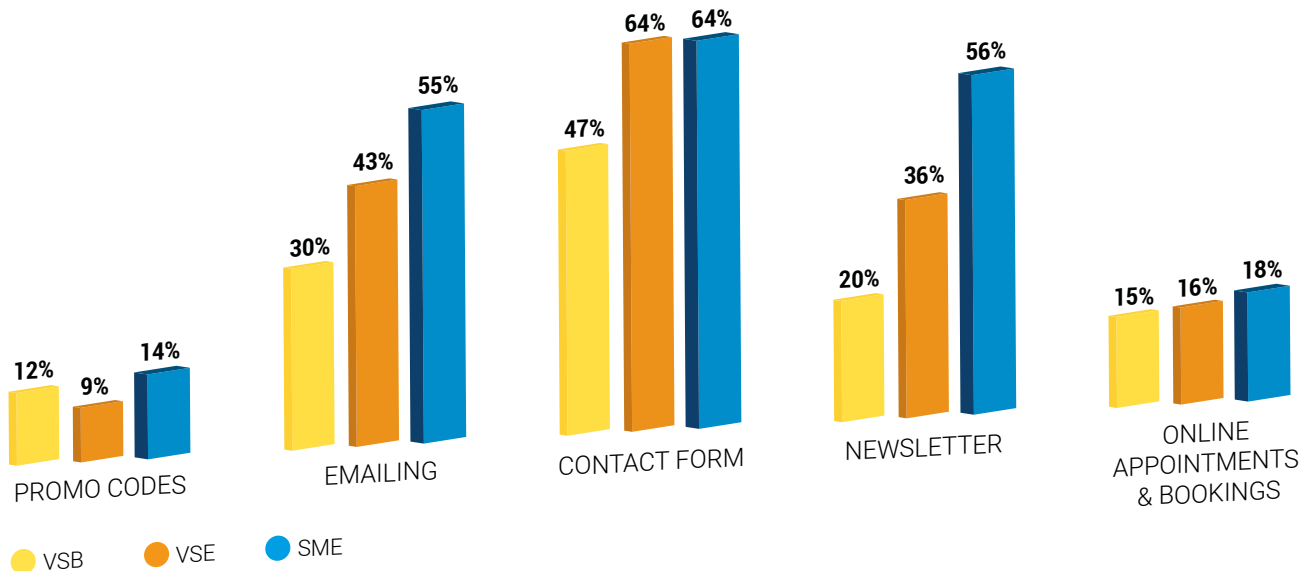
Newsletters follow the same trend: on average, 23% of respondents issue one. But this figure falls to 20% for VSBs while it jumps to 56% for SMEs. Booking modules, making online appointments (15%) and promo codes (12%) remain marginal whatever the size of the company.

SALES DEVELOPMENT TOOLS

Chart: Sales development tools by company size (VSB, VSE, SME)

- **PROMO CODES**: VSB 12%, VSE 9%, SME 14%
- **EMAILING**: VSB 30%, VSE 43%, SME 55%
- **CONTACT FORM**: VSB 47%, VSE 64%, SME 64%
- **NEWSLETTER**: VSB 20%, VSE 36%, SME 56%
- **ONLINE APPOINTMENTS & BOOKINGS**: VSB 15%, VSE 16%, SME 18%

Legend: ● VSB ● VSE ● SME

More than a quarter of respondents do not carry actions to develop their customer databases

52% of the companies prefer to use the contact form to build customer databases.

However, 37% of respondents admitted that they are not doing anything in this respect.

26% OF RESPONDENTS CHECK AT LEAST ONCE A MONTH, THE EFFECTIVENESS OF THEIR LOYALTY AND INTERNET DEVELOPMENT

7- E-commerce

Overall, respondents depend on the e-commerce solutions they use such as Wix or Shopify. For example, these solutions determine the variety of payment, contact or delivery terms.

64% of respondents place particular importance on the diversity of means of payment. 55% place particular importance on the means of contact. A little less than one out of two respondents proposes a client account (46% for VSBs and 62% for SMEs).

E-COMMERCE WEBSITE FEATURES

	VSB	VSE	SME
VARIOUS MEANS OF CONTACT	55%	59%	62%
VARIOUS DELIVERY MODES	31%	28%	38%
VARIOUS MEANS OF PAYMENT	65%	52%	62%
CLIENT ACCOUNTS	46%	52%	62%
ORDER TRACKING	42%	41%	43%

● VSB   ● VSE   ● SME
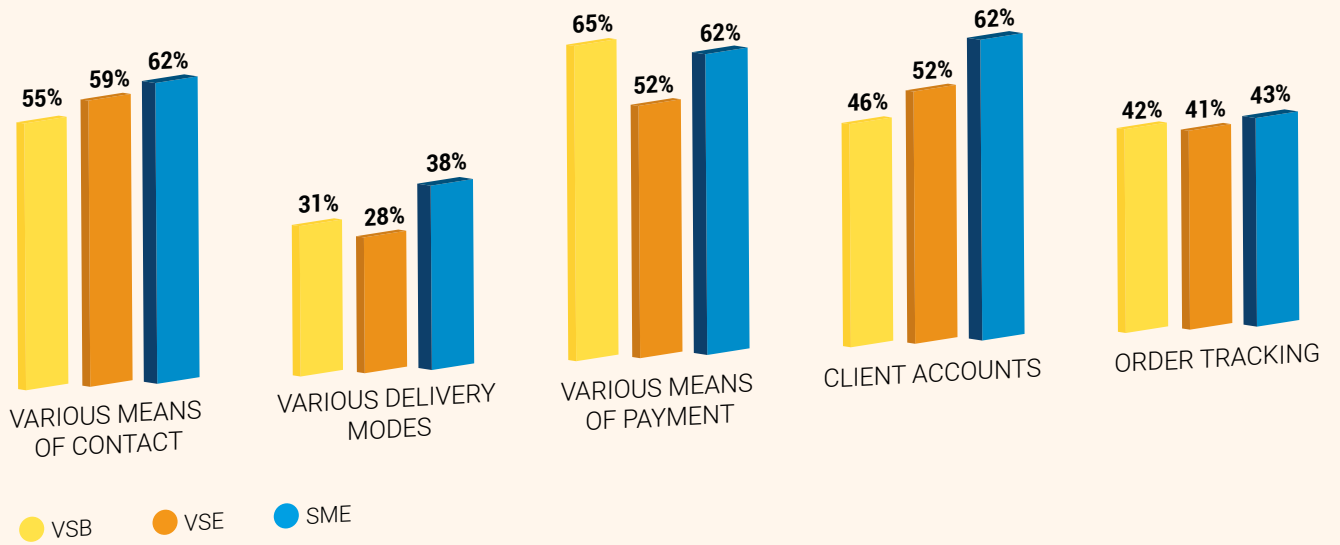
Order tracking is widespread without being used by most (42%) and 31% of companies offer several delivery methods.

8- Visibility and e-reputation

Visibility is a real expectation but efforts are random

Visibility and e-reputation are central to a successful online presence. The two factors also correspond to the main expectations of companies as mentioned above. **Having one's own domain name and email address is the basis for controlling one's reputation.**

54% of the respondents use an email address linked to their domain name (as a reminder, 88% stated they have their own domain name). The proportion is lower among VSBs (51%) than among SMEs (81%). For the rest, 27% of the respondents use an address under gmail.com.

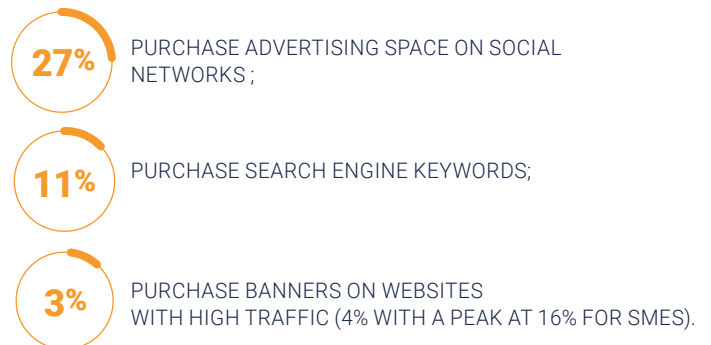### *Online reviews and ratings little taken into account*

More than half of the respondents systematically manage the comments and ratings concerning their businesses (57%). 18% do not care at all, the proportion falling to 14% among SMEs.

Only 12% systematically perform online assessments of customer satisfaction. This figure reaches 20% for SMEs. 68% of respondents never do so, this proportion "falls" to 48% for SMEs (but still remains considerable).

1/2

HALF OF RESPONDENTS DECLARE SEEKING INFLUENTIAL PARTNERS TO RELAY NEWS ON THEIR ACTIVITY ON THE INTERNET

2/3 of respondents do not advertise online

67% of respondents (regardless of the company's size) said they do not do any online advertising. When they do advertise, it is to:

27% PURCHASE ADVERTISING SPACE ON SOCIAL NETWORKS ;

11% PURCHASE SEARCH ENGINE KEYWORDS;

3% PURCHASE BANNERS ON WEBSITES WITH HIGH TRAFFIC (4% WITH A PEAK AT 16% FOR SMES).

Paper widely used to make oneself known online

84% of respondents massively use their business cards and other paper documents to publicize their internet address. All the other offline mediums (goodies, car stickers, shop windows, etc.) suggested in the questionnaire are only marginally used. Note, however, that 38% of SMEs include their internet address on their packaging or advertising objects.

| **Business cards and other paper documents**	**Packaging or advertising objects**	**Storefront, window, signs, etc.**	**Vehicles branding**
84%	**18%**	**15%**	**14%**

Difficulties in obtaining good positioning on search engines

Just like visibility and e-reputation, companies neglect or manage SEO in a way that is too low-tech.

These focus primarily on "free" organic SEO, but that is not something which can be improvised. The proof: the acquisition of key words remains a marginal factor whereas it should be an essential point.

37% Only 37% of respondents **say they are well positioned** in search engines. A proportion that reaches 56% for SMEs but caps at 34% for VSBs.

65% 65% of respondents take action to improve their organic SEO. On the other hand, purchases of paid keywords are rarer: 11% for VSBs and 26% for SMEs.
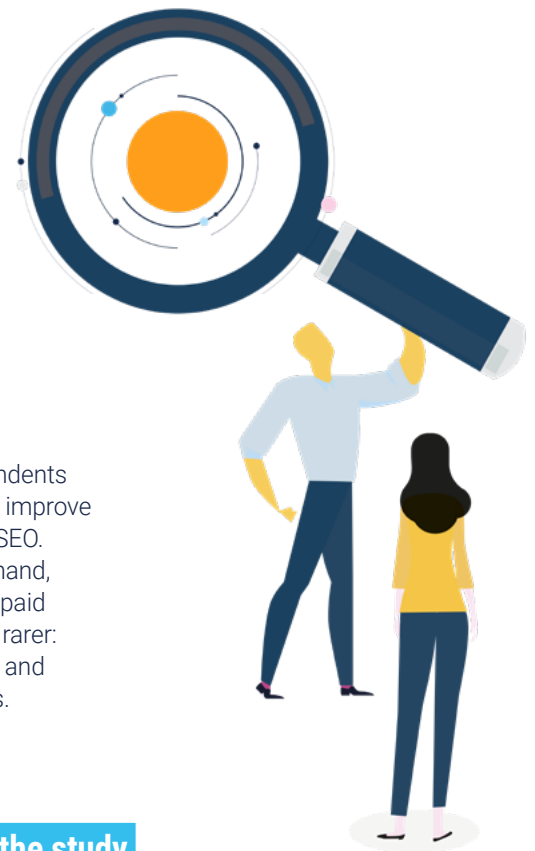
"Photofit" of the internet presence for each segment in the study

The "Photofit" presented here is designed to highlight the predominant features, trends and practices based on our analysis of each segment in our study.

THEME		VSB	VSE	SME
1	**Issues**	internet is useful or indispensable *(92%)*	internet is useful or indispensable *(91%)*	internet is useful or indispensable *(95%)*
2	**Motivations**	To present my business *(62%)*	To present my business *(71%)*	To present my business *(67%)*
3	**Types of presence**	Social networks *(76%)*	Website *(85%)*	Website *(84%)*
		Website *(67 %)*	Social networks *(80 %)*	Social networks *(78 %)*
4	**Investment and ROI**	Budget of less than €1,000 per year *(89%)*	Budget of less than €1,000 per year *(68%)*	Budget of less than €1,000 per year *(52%)*
		I spend less than one hour a day on the internet *(55%)*	I spend less than one hour a day on the internet *(61%)*	I spend more than one hour a day on the internet *(49%)*
		I earn less than 10% of my turnover thanks to the internet or I do not know how to estimate it *(55%)*	I earn less than 10% of my turnover thanks to the internet or I do not know how to estimate it *(70%)*	I earn less than 10% of my turnover thanks to the internet or I do not know how to estimate it *(77%)*
5	**Identity management**	I have my own domain name *(86%)*	I have my own domain name *(96%)*	I have my own domain name *(94%)*
		My address is in .FR *(51%)* and in .com *(42%)*	My address is in .FR *(55%)* and in .com *(37%)*	My address is in .FR *(58%)* and in .com *(35%)*

THEME		VSB	VSE	SME
6	**Nature of Web content**	I mainly use it to present my business (94%).	I mainly use it to present my business (99%).	I mainly use it to present my business (98%).
		I use texts and pictures (96%), videos much less (36%)	I use texts and pictures (96%), videos much less (45%)	I use texts and pictures (97%), videos a little less (58%)
		I update my website less than once a week (63%)	I update my website less than once a week (62%)	I update my website less than once a week (45%)
		My content is mobile-friendly (83%)	My content is mobile-friendly (70%)	My content is mobile-friendly (78%)
7	**Social networks**	I mainly use Facebook (90%) and LinkedIn (49%)	I mainly use Facebook (75%) and LinkedIn (50%)	I mainly use Facebook (85%) and LinkedIn (76%)
		I cannot estimate the profitability (46%)	I cannot estimate the profitability (48%)	I cannot estimate the profitability (53%)
		I have connected my website and my social networks (72%)	I have connected my website and my social networks (64%)	I have connected my website and my social networks (68%)
		I don't have a planning (74%)	I don't have a planning (72%)	I don't have a planning (52%)
8	**Business development** * Or never	Tools: I prefer the contact form (47%)	Tools: I prefer the contact form (64%)	Tools: I prefer the contact form (64%)
		Customer base: I prefer the contact form (51%)	Customer base: I prefer the contact form (66%)	Customer base: I prefer the contact form (64%)
		I check the effectiveness of my operations less than once a month (74%)	I check the effectiveness of my operations less than once a month (78%)	I check the effectiveness of my operations less than once a month (64%)
9	**E-Commerce features**	My priority is the means of payment (65%)	My priority is the customer area (59%)	3 priorities: contact channel, means of payment and customer page (62%)
10	**Visibility and e-reputation**	My emails are linked to my domain name (51%)	My emails are linked to my domain name (84%)	My emails are linked to my domain name (81%)
		I do not advertise on the internet (68%)	I do not advertise on the internet (72%)	I do not advertise on the internet (56%)
		I systematically manage the comments and ratings for my business (57%)	I systematically manage the comments and ratings for my business (51%)	I systematically manage the comments and ratings for my business (50%)
		I never do an online survey on customer satisfaction (69%)	I never do an online survey on customer satisfaction (66%)	I never do an online survey on customer satisfaction (48%)
		I search for influential partners (52%)	I do not search for influential partners (58%)	I do not search for influential partners (52%)
		I make my internet address known by my business cards etc. (83%)	I make my internet address known by my business cards etc. (89%)	I make my internet address known by my business cards etc. (84%)
11	**SEO**	My site is not well positioned in search engines (41%)	My site is well positioned in search engines (50%)	My site is well positioned in search engines (56%)
		I focus on organic SEO (65%)	I focus on organic SEO (61%)	I focus on organic SEO (74%)

IN CONCLUSION

By aggregating all of the data collected in order to identify areas that have been mastered and areas for improvement in companies' approaches to their online presence, the following cases emerge:

STRENGTHS

These dimensions of online presence have been well mastered with actions to be implemented with regard to **optimisation.**

• Respondents are well aware **of the stakes involved in an online presence**, which they consider both inevitable and as a source of benefits for their company (even if they are unable to quantify these benefits or specifically identify them).

• They are also highly vigilant regarding the problems of **managing their online identity**, preferring to use their own domain name to enhance their online visibility and improve communication.

POINTS TO CONSOLIDATE

These dimensions require actions to consolidate the efforts already made. They include:

• **Regular publication of diverse content,** piquing visitors' interest in the company and/or encouraging them to use its services or buy its products. Publishing blog articles more frequently, offering interactive formats such as videos or using testimonials from satisfied customers are all avenues to explore for businesses wanting to stand out from the crowd online.

• **Use of e-commerce functions** to allow companies to generate turnover via their online presence. The emergence of 'all-in-one' platforms has enabled businesses to access this type of service more easily and at a reasonable cost. Not all companies need an e-shop, depending on their activity, but offering an online reservation or appointment system is the first step towards e-commerce.

• **Presence on social networks,** deemed to be essential in order to effectively reach intended targets. However, respondents sometimes encounter difficulties in evaluating the profitability of time spent on this point. A low proportion of them buy advertising space on social media, for example, giving them a means to tangibly measure the benefits of actions put in place on these networks.

POINTS TO DEVELOP

These areas remain poorly mastered by respondents who still need **to get to grips** with them:

• **Motives for being online:** many respondents are online "because you have to be", limiting themselves to the most basic levels of presence (presentation of their activity, making themselves easy to find) without having developed a strategy for their company or having understood the tangible benefits they can reap.

• **Online visibility:** consistent with the previous point, most respondents have created a website and/or pages on social networks, but are not looking to make themselves known through referencing on other websites or platforms, or by using online advertising, for example.

• **The notion of investment and return on investment:** although financial resources remain low overall, respondents are investing time in the management of their online presence. But the general feeling is that these investments are only marginally profitable. Three-quarters of respondents consider that the internet generates less than 10% of their turnover, or are unable to evaluate this figure.

• **Commercial development:** the relatively passive approach adopted by respondents, which consists of waiting for new customers to appear rather than putting in place actions to win them over, is consistent with the lack of commercial development observed: contact forms are the prevailing option, rarely supplemented by other more 'active' initiatives like a newsletter, promotional codes, free content in exchange for a contact email address, etc. This area is the weakest of the points explored here.

• **Search Engine Optimisation (SEO):** a logical consequence of the points already mentioned, SEO is most often 'natural', meaning that only a minority of respondents consider that they appear on the first search engine results pages.

These levels of acquisition also differ depending on the size of the company, as demonstrated in the table below:

	Total	VSB	VSE	SME
Challenge	🟢	🟢	🟢	🟢
Motives for being online	🔴	🔴	🔴	🔴
Types of presence	🔴	🔴	🔴	🔴
Investment and Return On Investment	🔴	🔴	🔴	🟠
Identity management	🟢	🟢	🟢	🟢
Content to inform and attract	🟠	🟠	🟠	🟢
Social networks	🔴	🔴	🔴	🟠
Commercial development	🔴	🔴	🔴	🔴
E-commerce functions	🟠	🟠	🟠	🟠
Visibility and e-reputation	🔴	🔴	🟠	🟠
SEO	🔴	🔴	🟠	🟠

🟢 Strength (to be optimised)

🟠 To consolidate

🔴 To develop

In conclusion, we can see that business culture is still very anchored in the real world.

As such, despite the certainty that you "have to be online", financial and human investment remains low (reluctance to pump resources into something that is not fully understood, concerns over ROI, lack of skills in digital tools). These obstacles for the most part prevent the initiation of a virtuous circle, which, once a certain level of investment has been made in line with the business strategy, will result in tangible benefits. Beyond increasing turnover via the Internet, the benefits can vary vastly and are not necessarily quantifiable on the face of it: time savings or enhanced image, for example.

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