

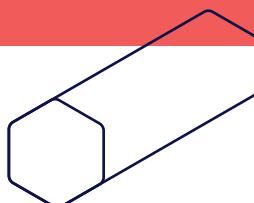
Internet & VSES/SMES

A catalyst for growth
and development
that still requires
firm support

**Results of the
Réussir avec le Web study**
(september 2020 - august 2021)

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Helping French businesses take the leap

As part of its management of the .fr, Afnic has set itself the task of helping VSEs/SMEs make the most of digital technology thanks to a simple, independent and controlled online presence.

The health crisis has accelerated the rate of realisation of the need for an online presence, encouraging businesses to invest in digital tools and new functionalities to best meet the needs of their clients.

Overview of the study

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

In August 2021, 4 years after its launch, more than 13,000 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.*

2,260
respondents
between
september 2020
and august 2021

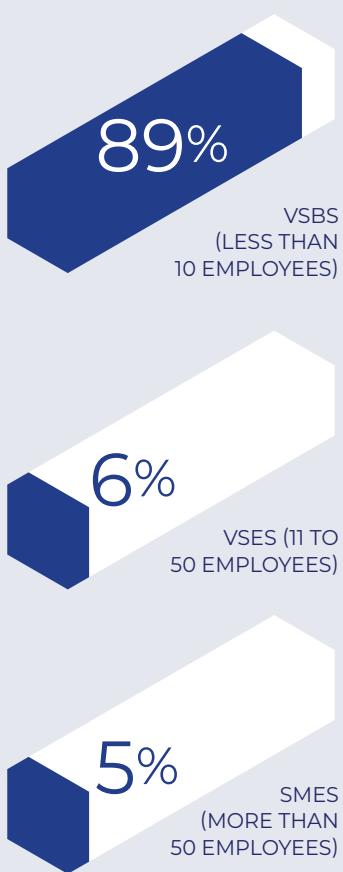
What was the methodology used, you ask?

This fourth edition was based on a wave of over 2,200 responses collected from a new sample over one year, from September 2020 to August 2021. As with the previous editions, 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 89% of respondents were VSBs and that 40% had launched their business in the last year. This has a clear impact on the data collected.

Profiles of responding companies

ACCORDING TO SIZE

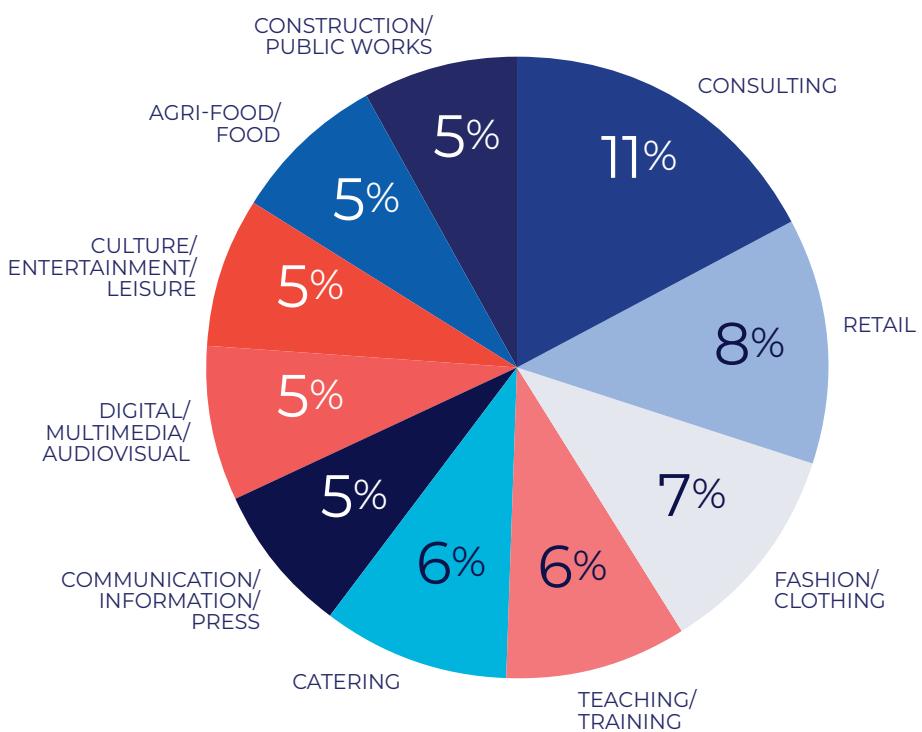
Among the respondents to the questionnaire:



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

ACCORDING TO SECTOR

Top 10 business sectors representing 62% of respondents:



Although, conversely, some sectors appear absent or under-represented, several interpretations are possible: they are not familiar with the Réussir avec le Web offer; the sectors in question are led by companies that fall outside of our target due to their size; these sectors depend little on the Internet, or, on the contrary, they already have an outstanding grasp of the network.

FOREWORD

ACCORDING TO SENIORITY

This year, there were almost as many young companies less than a year old as companies 3 years old or more.

41%

OF COMPANIES
WERE LESS THAN
1 YEAR OLD

20%

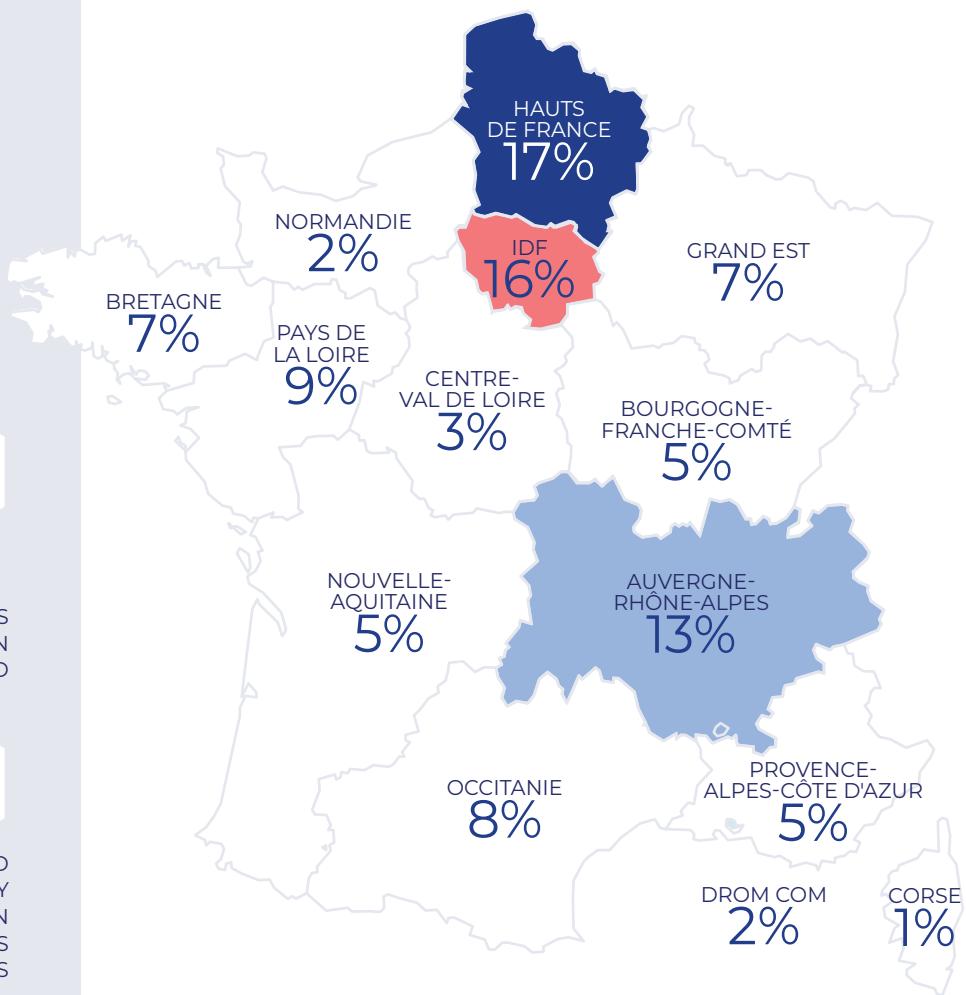
HAD
ALREADY
BEEN
IN BUSINESS
FOR 1 TO 3 YEARS

39%

3 YEARS OLD
OR MORE.

Quite logically,
these are the largest
structures in terms
of personnel (VSE / SME)

ACCORDING TO REGION



Almost half of respondents (46%) were spread across 3 regions: Hauts-de-France, l'Île-de-France and Auvergne-Rhône-Alpes. 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.

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In conclusion



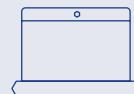
A period marked by the health crisis, 2020/2021 was particular in the sense that it saw many companies develop their online presence at forced march. We can therefore expect breaks in patterns, or at least more accentuated behaviour. But it is also due to this exceptional context that our study takes on meaning: after two years of “other things being equal” and two years impacted by COVID-19, what emerges?



Sharp growth in **e-commerce functions**



The notion of investment and **return on investment** showed a positive trend in 2021, particularly for SMEs



Motives for being online and **SEO** have progressed, moving into the category of priorities in the process of consolidation



Steady development of **social network presence**, yet with a still ambivalent perception of the profitability of time spent



SMEs placed the greatest emphasis on business **development operations**



The % of respondents using a .FR address showed significant growth
(53% compared to 49%)

The following table presents a simplified summary of the strengths, points to consolidate and points to develop based on company size:

	VSB	VSE	SME
Issues	3	3	3
Motives for being online	1	1	2
Types of presence	1	1	2
Investment and return on investment	1	1	2
Identity management	3	3	3
Content to inform and attract	2	3	3
Social networks and powerful partners	2	2	2
Business development	1	1	2
E-commerce functions	2	2	2
Visibility and e-reputation	1	1	2
SEO	1	2	2

3 - Strength (to be optimised)
2 - “Neutral” (to be consolidated)
1 - Weakness (to be developed)

Le « portrait-robot » présenté ici vise à mettre en exergue les faits saillants, les tendances et pratiques dominantes émergeant de l'analyse pour chaque segment de notre clé de lecture.

THEME	VSB	VSE	SME
 Types of presence	Social networks (80%)	Website (81%)	Social networks (76%)
	Website (67%)	Social networks (79%)	Website (76%)
	Online sales (27%)	Online sales (28%)	Online sales (41%)
 Investment and ROI	Budget of less than €1,000 per year (89%)	Budget of less than €1,000 per year (67%)	Budget of less than €1,000 per year (44%)
	I spend at least one hour a day on the Internet (46%)	I spend at least one hour a day on the Internet (45%)	I spend at least one hour a day on the Internet (62%)
	I generate more than 30% of my turnover thanks to my online presence (29%)	I generate more than 30% of my turnover thanks to my online presence (19%)	I generate more than 30% of my turnover thanks to my online presence (32%)
 Identity management	I have my own domain name (89%)	I have my own domain name (92%)	I have my own domain name (91%)
	My address is in .FR (53%) and in .COM (41%)	My address is in .FR (51%) and in .COM (39%)	My address is in .FR (60%) and in .COM (36%)
	I use video content (39%)	I use video content (54%)	I use video content (61%)
 Nature of Web content	I update my website at least than once a week (40%)	I update my website at least than once a week (50%)	I update my website at least than once a week (61%)
	I mainly use Facebook (90%) and Instagram (62%)	I mainly use Facebook (90%) and Instagram (56%)	I mainly use Facebook (69%) and Instagram (87%)
	I cannot estimate the profitability of the time spent or I think they are not profitable (73%)	I cannot estimate the profitability of the time spent or I think they are not profitable (62%)	I cannot estimate the profitability of the time spent or I think they are not profitable (65%)
 Social networks	I don't have a schedule (69%)	I don't have a schedule (61%)	I don't have a schedule (57%)
	I prefer the contact form (49%)	I prefer emailing (52%)	I prefer emailing (69%)
	I check the effectiveness of my operations less than once a year* (56%)	I check the effectiveness of my operations less than once a year* (53%)	I check the effectiveness of my operations several times a year (64%)* (56%)
 E-Commerce functions	My priority is payment methods (69%) followed by contact channels (65%)	My priority is payment methods (80%) followed by contact channels (73%)	My priority is the customer area (81%) followed by contact channels (69%)
	My emails are linked to my domain name (48%)	My emails are linked to my domain name (74%)	My emails are linked to my domain name (78%)
	I do not advertise on the Internet (66%)	I do not advertise on the Internet (59%)	I do not advertise on the Internet (49%)
 Visibility and e-reputation	I systematically manage the comments and ratings for my business (62%)	I systematically manage the comments and ratings for my business (42%)	I systematically manage the comments and ratings for my business (52%)
	I never conduct customer satisfaction surveys (38%)	I never conduct customer satisfaction surveys (54%)	I never conduct customer satisfaction surveys (66%)
	I do not know if my site is well positioned or not (63%)	My site is well positioned on search engines (63%)	My site is well positioned on search engines (61%)
 SEO	I buy keywords (12%)	I buy keywords (20%)	I buy keywords (33%)



Results of the study

2020-2021

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.



Being online: useful and even essential

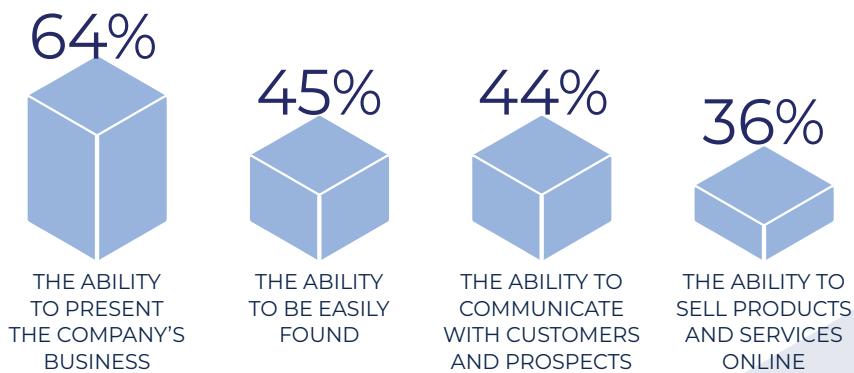
All of the respondents have understood the need to be present on the Internet.

68% of companies surveyed consider it essential to their activity, while the remaining 32% consider it useful, although 6% added that they do not have the time or the resources.



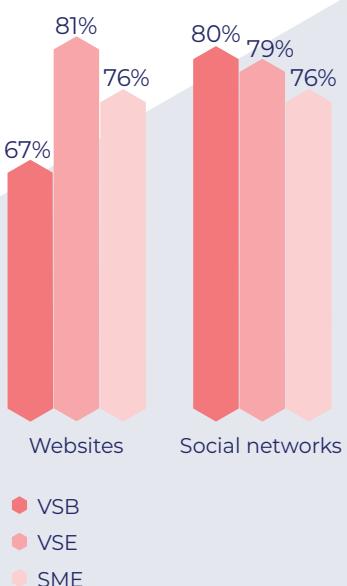
consider
their presence
on the Internet
essential to
their activity.

The top three expectations related to online presence include:



Note that among SMEs, the ability to communicate with customers and prospects comes in second place with 55%.

Websites, one of the most widely used tools by small companies



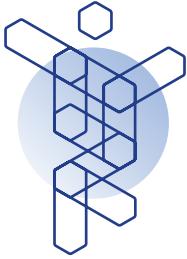
Presence on the Internet today equally involves websites (68%) and social networks (80%). But the figures vary according to the size of the company.

VSEs tend to acquire a website more frequently (81% compared to 67% for VSBs) and to use third-party sites for SEO purposes (37%).

SMEs use both their website and social networks to promote their business. They also tend to **sell online (41%) more** than VSBs (27%) and VSEs (28%).

More than half of VSEs and SMEs surveyed (54%) are indexed on specialist platforms or online directories compared to 37% for VSBs. Of these, almost 2/3 state that they never submitted a request.

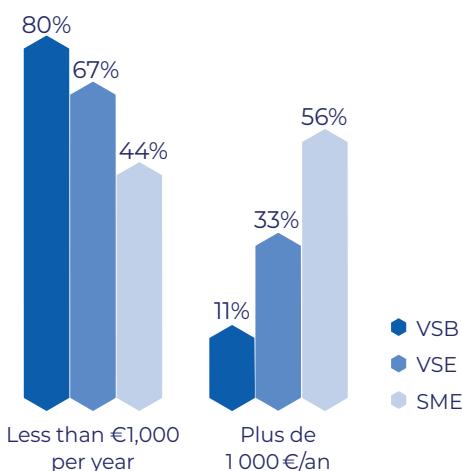
84%
have a responsive
website for
mobile viewing.



A modest budget offset by man-hours

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

More than half of respondents, 59%, spend less than €300 a year on their online presence. 27% invest between €300 and €1,000. Only 15% spend more than €1,000 on their Internet presence system. Here again, the size of the company is a major factor. Although only 2% of VSBs invest more than €5,000 per year, this figure increases to 41% for SMEs.

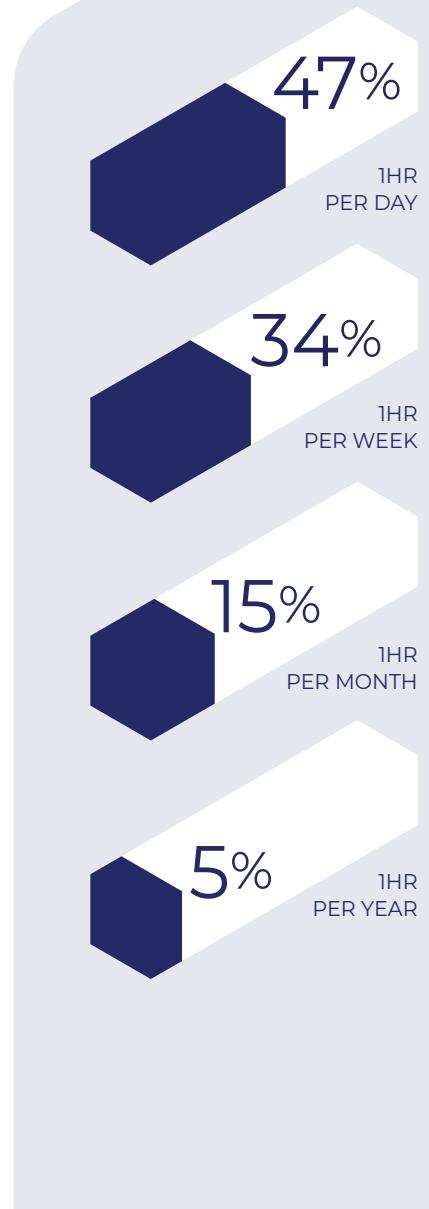


Time spent on Internet presence

Regarding the time spent managing online presence, almost half of respondents say they spend less than one hour a day.

20% spend less than one hour per month.

These figures increase to 62% and 17% for SMEs. Once again, size is a factor, especially when it comes to daily online activity.



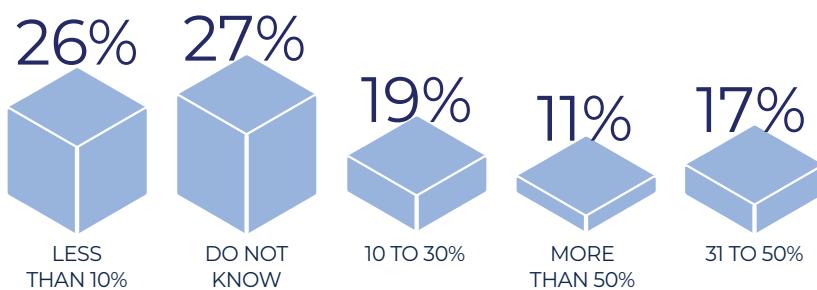
A return on investment difficult to quantify

More than half 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 (less than 10%).

However, almost one-third of respondents estimate that they generate more than 30% of their turnover thanks to their online presence.

This result varies only slightly depending on the size of the company.

Percentage of turnover achieved through the Internet

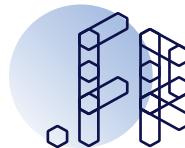


A majority of custom domain names



Types of internet address

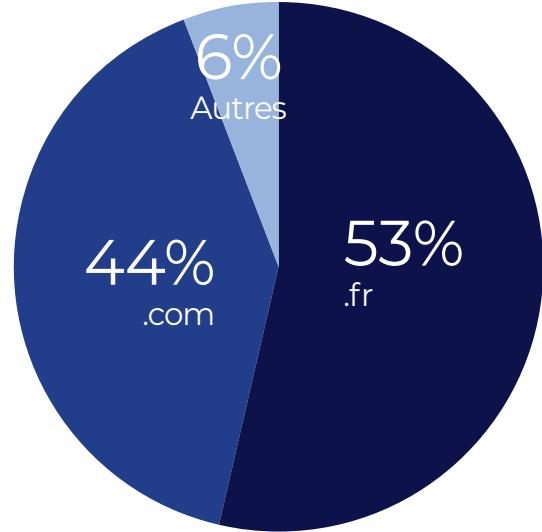
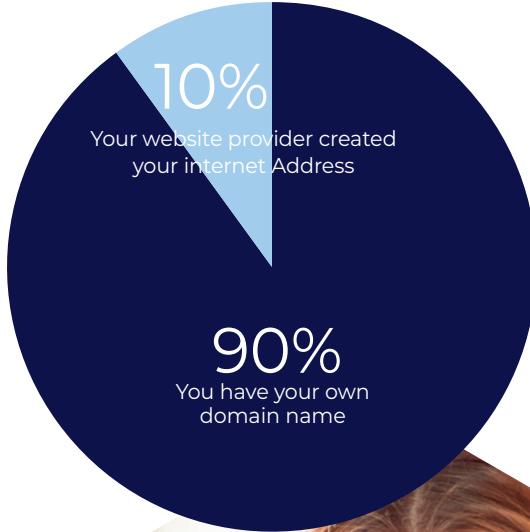
90% of respondents say they have their own domain name, while 10% use their provider's domain name for their website (i.e.: www.mycompany.myprovider.fr) These practices vary only slightly depending on the size of the company.



Types of top-level domains

Among the Top-Level Domains chosen for their websites, the .FR (53%) and the .COM (44%) are the two undisputed leaders.

The other TLDs (.net, .org, etc.) are highly marginal. The .FR is the most popular TLD, notably with SMEs (60% for the .fr vs. 36% for the .com).



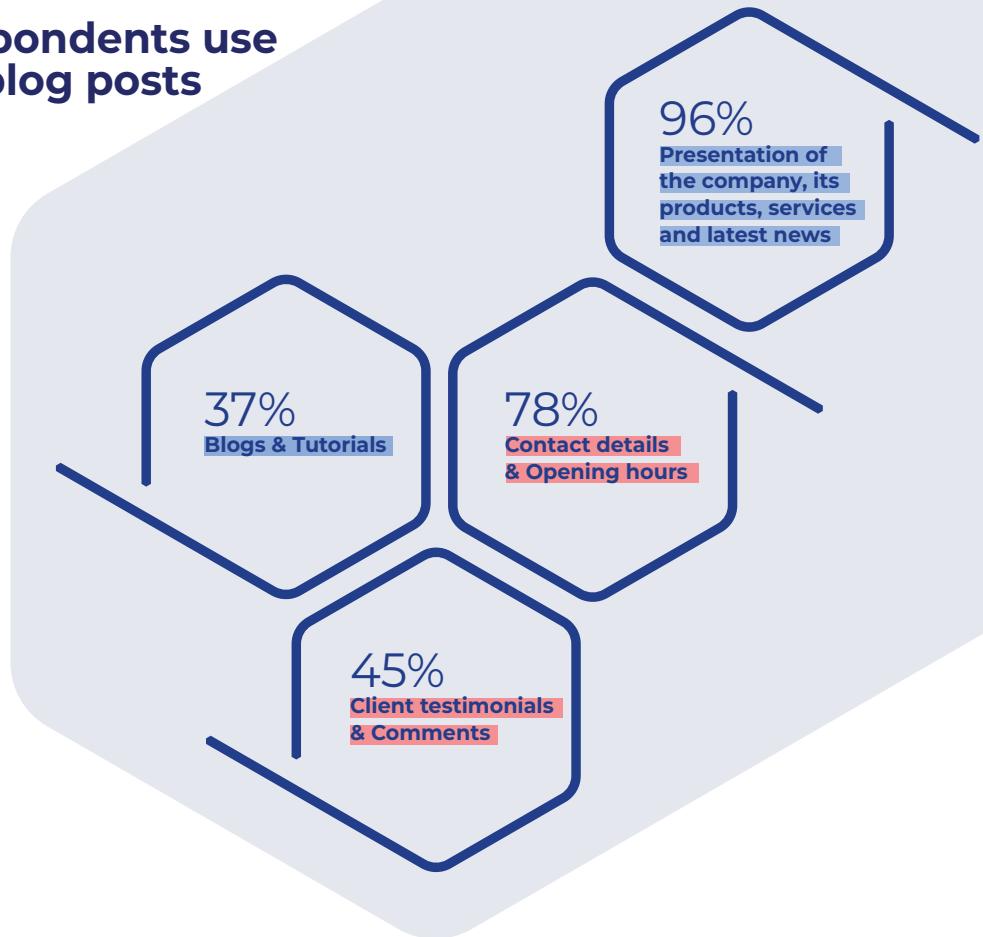
Almost half of respondents use testimonials and blog posts

Types de contenus

Almost all (96%) of the respondents provide a presentation of their company on their website, its products, latest news, etc. Next are contact details and/or opening times (78%). Almost half (41%) use "value-added" content such as blog posts (37%) or testimonials (45%).

Regarding formats, the contents remain simple. Text (97%) and images (96%) are commonplace, but video is more rarely used (41%).

Which likely remains a question of means: 61% of SMEs say they publish videos, but only 39% of VSBs do so.

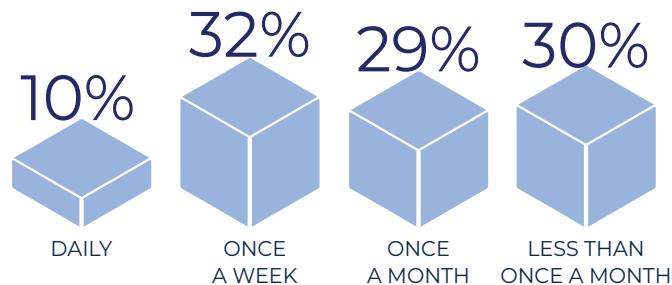


Infrequent content publication on websites

58% of respondents update their websites less than once a week and 10% do so every day. These proportions are respectively 60% and 9% for VSBs and 39% and 23% for SMEs. Here again size - and therefore human and financial resources - is a factor.

These results can be summarised 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 surveyed, due to their size or business sector.

Frequency of publication



A presence deemed inevitable but the profitability of which is difficult to quantify

Although 80% of the companies surveyed state that they are present on social networks, 72% do not consider the time invested on social these platforms as "profitable" for their business or do not know how to evaluate it. Only 7% of VSBs deem this presence entirely profitable, compared to 14% of SMEs.

75%
have connected
their website
to their social
network pages.

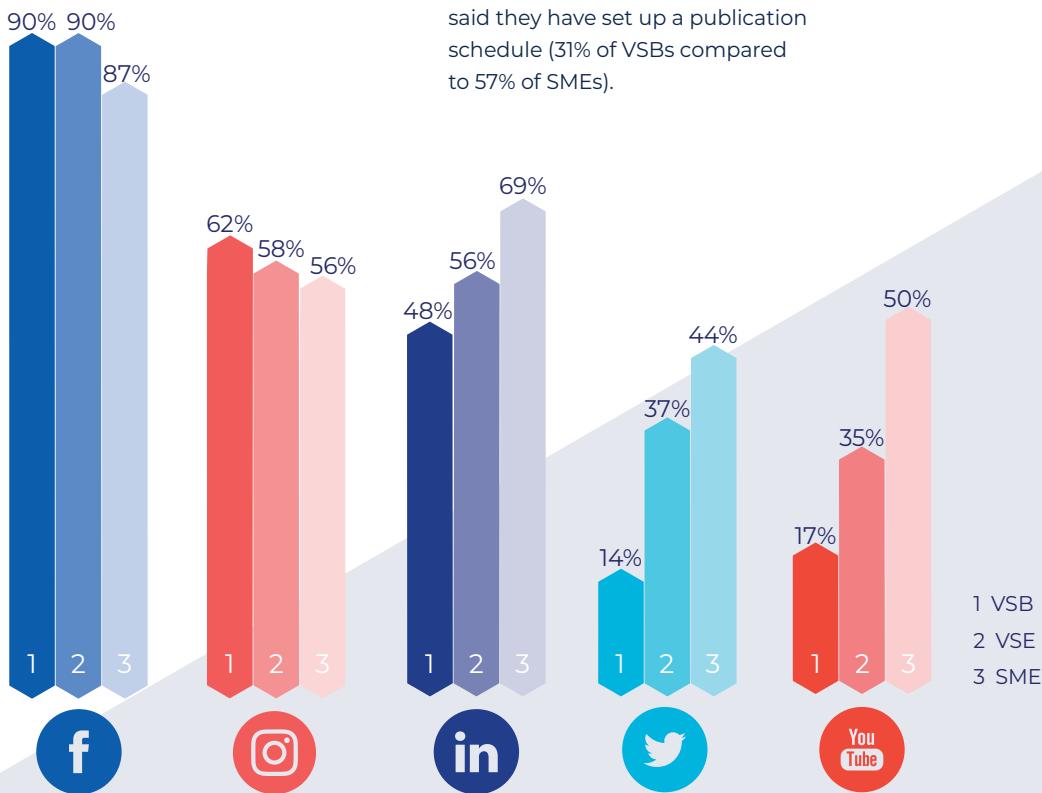
Facebook unbeatable

The social networks most used by companies are Facebook (89%), Instagram (55%) and LinkedIn (49%).

Practices, however, are related to size: 62% of VSBs are on Instagram compared to 56% of SMEs, and 48% of VSBs are on LinkedIn compared to 69% of SMEs.

These contrasts are also found on Twitter (respectively 14% and 44%) and YouTube (17% and 50%). Only 33% of the companies surveyed said they have set up a publication schedule (31% of VSBs compared to 57% of SMEs).

Facebook and Instagram are the most commonly used social networks.



1/3 of respondents use online tools

The contact form is the most popular sales development tool, used by 49% of respondents.

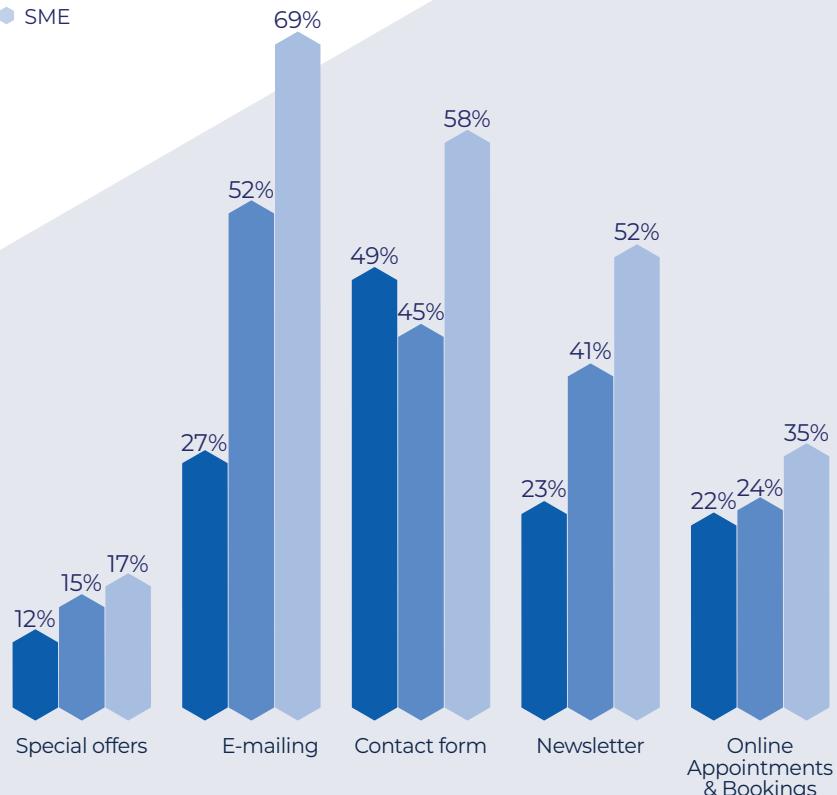
Then comes emailing with 30%. But it is less used by VSBs (27%), while SMEs use email a great deal (63%, ahead of contact forms and newsletters).

Newsletters follow the same trend: on average, 24% of respondents issue one. But this figure falls to 22% for VSBs while it jumps to 44% for SMEs.

Booking modules, online appointments (20%) and promo codes (12%) remain marginal whatever the size of the company.

Sales development tools

- VSB
- VSE
- SME



33 % of respondents do not carry out actions to develop their customer databases

54% of companies prefer to use a contact form to build customer databases.

Furthermore, 21% give customers the option to create an account on a first purchase, and 16% offer free content in exchange for an email address (white paper, top tips, etc.).

29% of respondents
check the effectiveness of their online loyalty initiatives and development at least once a month, while 36% never do so.

E-commerce websites add a variety of functions

Most respondents that operate e-commerce use solutions proposed by service platforms.

These solutions determine payment methods, contact options and delivery terms, for example.

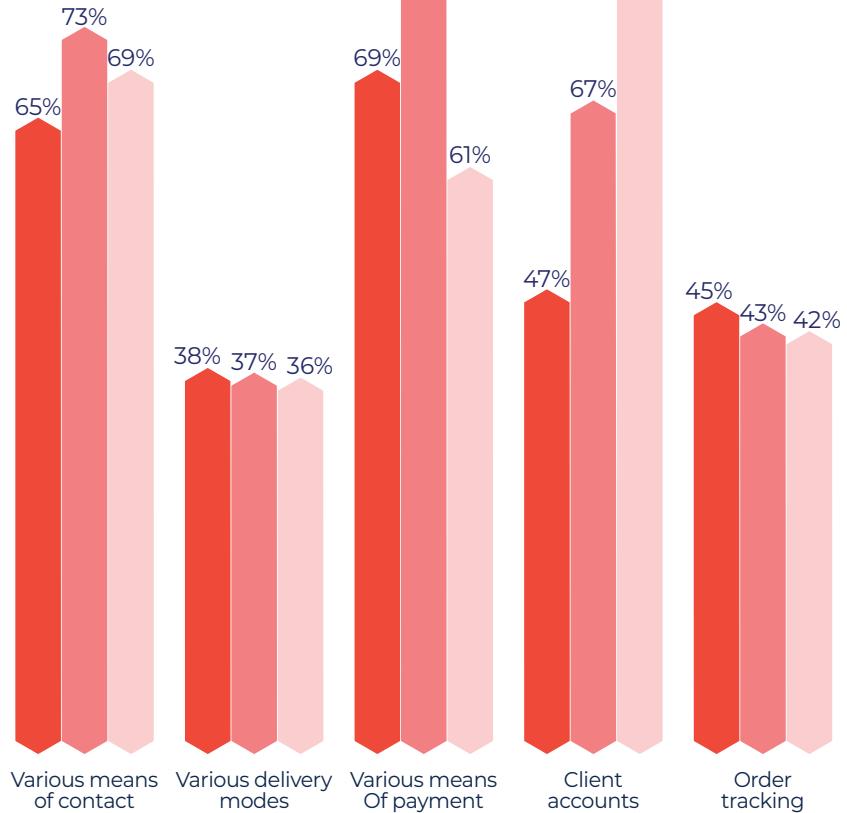
69% of respondents place particular importance on the diversity of means of payment, while 65% place particular importance on the means of contact.

Half of respondents proposes a customer account (47% for VSBs and 81% for SMEs) while 45% propose order tracking.

However, only 38% of companies offer several delivery methods, regardless of their size.

E-commerce website functions

- VSB
- ◆ VSE
- SME



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. **Having domain name and email address is the basis for controlling one's reputation.** 51% of respondents use an email address linked to their domain name even though 90% have registered one. The proportion is lower among VSBs (48%) than among SMEs (78%). One-third of respondents use a gmail.com address for their company.

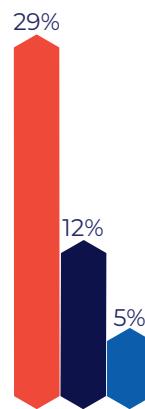
48%

of respondents declare that they seek influential partners to relay news on their activity on the internet.

Online reviews and ratings little taken into account

More than half of respondents (60%) systematically reply to comments and ratings concerning their businesses, 26% occasionally and 13% not at all. 41% conduct online customer satisfaction surveys, of which 16% do so systematically. This figure reaches 30% for SMEs. 59% of respondents never do so, and this proportion falls to 34% for SMEs.

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:

- PURCHASE ADVERTISING SPACE ON SOCIAL NETWORKS
- PURCHASE SEARCH ENGINE KEYWORDS (11% OF VSBS VS. 34% OF SMES)
- PURCHASE BANNERS ON WEBSITES WITH HIGH TRAFFIC (3% OF VSBS VS. 32% OF SMES)

Paper widely used to make oneself known online

81% of respondents massively use their business cards and other paper documents to publicise their Internet address. All other offline mediums (goodies, car stickers, shop windows, etc.) suggested in the questionnaire are more marginally used. It should be noted, however, that 47% of SMEs include their Internet address on their packaging or advertising objects.

81%



Business cards and other paper documents

21%



Packaging or advertising objects

20%



Storefront, window, signs, etc.

17%



Vehicle branding

The long task of making the first search page

Just like visibility and e-reputation, SEO is an avenue for improvement for the companies surveyed.

They focus primarily on “free” organic SEO, but this requires long-term efforts on the part of the company.

40%

LESS THAN HALF OF
RESPONDENTS SAY THEY ARE
WELL POSITIONED ON SEARCH
ENGINES.
A proportion that reaches
61% for SMEs but caps
at 37% for VSBs.

65%

TWO-THIRDS OF RESPONDENTS
TAKE ACTION TO IMPROVE
THEIR ORGANIC SEO.
On the other hand, purchases of paid
keywords are rarer: 12% for VSBs
and 33% for SMEs.



EXECUTIVE SUMMARY

2021: the “Big Bang” year in the digital transformation of French businesses?

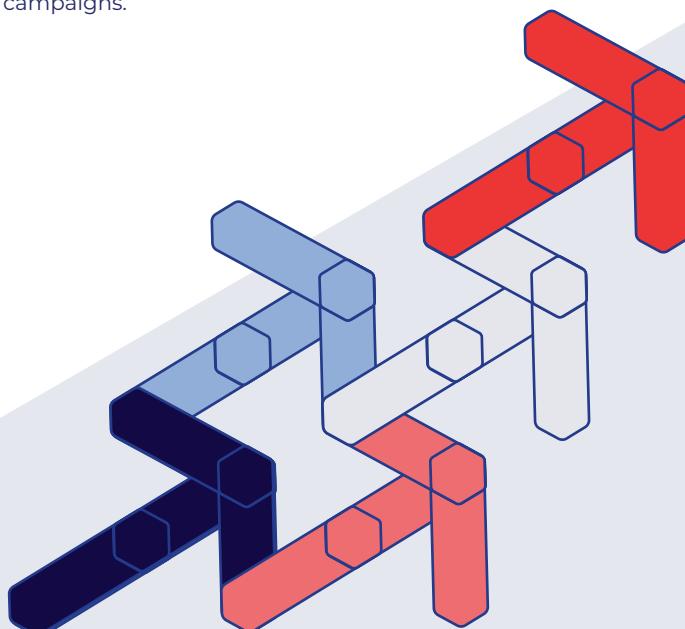
The picture that forms from the figures highlighted by the study is one of transition rather than rupture. The term ‘acceleration’ is more appropriate than ‘revolution’. Restricted by the conditions brought about by the successive lockdowns, companies have accentuated their online presence, investing more time and money and using channels they had not previously explored. But question marks remain surrounding the profitability of some media, particularly social networks. This context presents immense opportunities for website publishing platforms which offer simple access and use services and incorporate e-commerce functions.

The development of SEO also demonstrates increasing maturity: companies are realising that being present on the Internet is not an end in itself and that specific actions need to be carried out to create traffic in order to promote their online presence. Horizons are gradually broadening, making way for real strategies, even if these remain at an SME level.

The different segments are not on equal footing in the face of this transformation. Larger companies have a greater advantage, as they have greater human resources and investment capacity. Their retail “coverage” also holds the promise of greater return on investment from their online actions than smaller structures, which find it harder to reach a satisfactory break-even point. For example, they have invested in their website without offering attracting content and without regular updates. Their means have not stretched to an SEO specialist or online advertising, and they have not put in place emailing campaigns.

The Internet “economy” as seen through the eyes of the respondents in our study remains one dominated by a low level of financial investment partly dictated by persistent questions regarding return on investment. This is without doubt an area with significant scope for further development, enabling business leaders to accurately assess the ROI of their digital actions. Beyond the development of turnover, there are many benefits of an online presence (time savings, enhanced profile, etc.) that are sometimes two-pronged.

What these companies now need in order to continue to expand online is easy and low-cost access to functionalities that generate new opportunities and attract new clients, as well as support to simplify their uptake of these new tools. The acceleration over the last few months, through the removal of certain obstacles, the creation of new needs and the sudden spike in awareness, make a return to a pre-pandemic situation highly unlikely. The challenge is therefore to consolidate these changes and accelerations in digital uses by enabling VSEs/SMEs to become increasingly autonomous in managing and developing their online presence. This provides ample opportunities for players in the value chain (registrars, hosters, website solution publishers, etc.) and, more generally, for players involved in the digital transformation of small companies, to continue to develop services and assistance tailored to this challenge.



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