



Flint Studios and
A&L Goodbody

NI eCommerce Survey
May 2019

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Undertaken by Flint Studios and A&L Goodbody, the survey was completed by companies from various sectors including Wholesale and Retail, Construction, Computer & Electronics, Lifestyle & Home, and Fashion & Beauty in Northern Ireland:

- **262** full responses collated via the LucidTalk NI Business & Managers Panel and Flint Studios marketing
- **206** responses qualified as an established NI eCommerce business or a NI business with an eCommerce strategy underway
- The following findings are based on the responses of the **206** eCommerce qualified businesses only
- All results are analysed by the main **project demographics**: Gender, Age-Group, Occupation Role, Education Level, Residence Area etc..

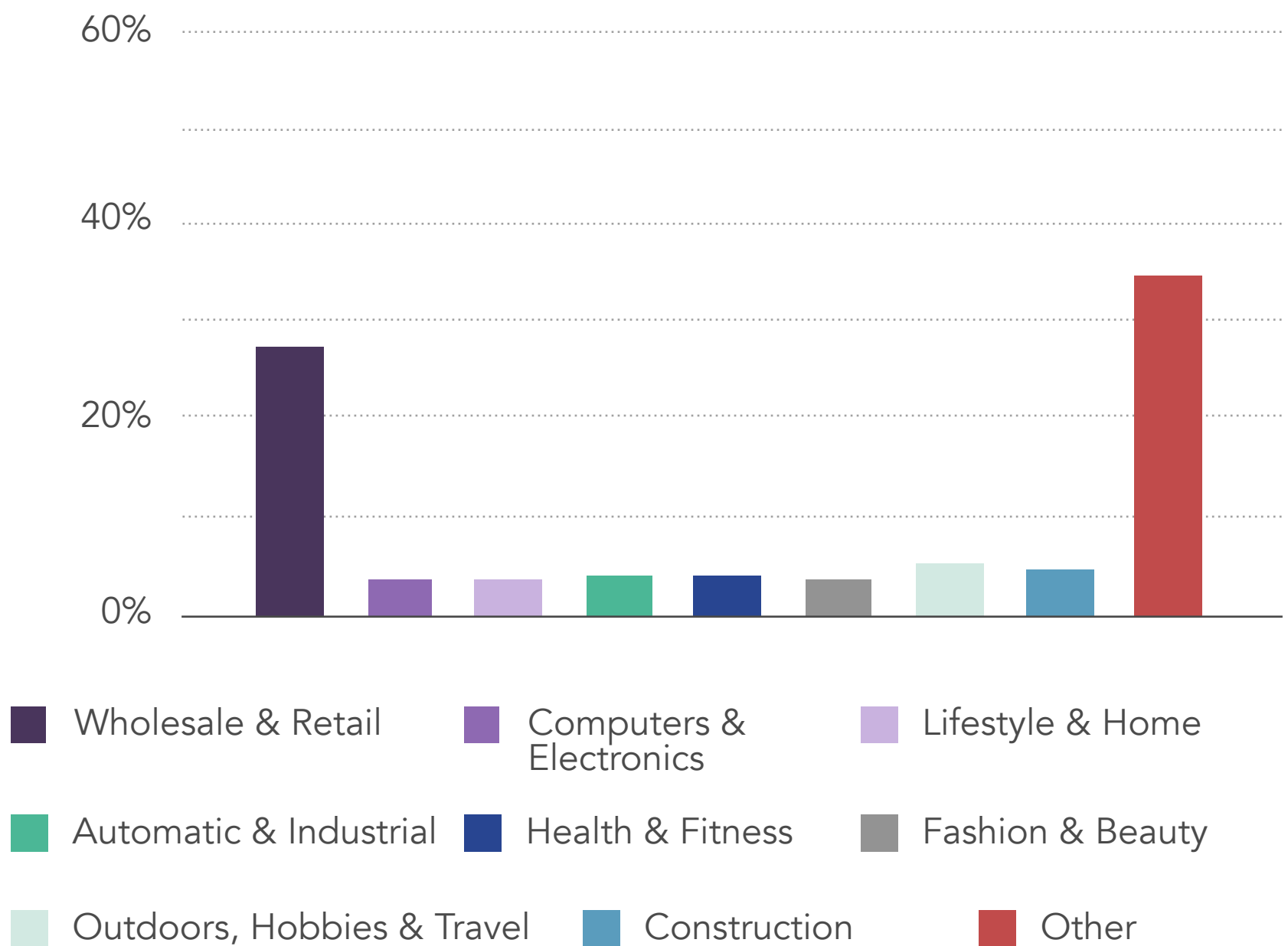
Key Findings

The key findings from this research demonstrate the scale of eCommerce in Northern Ireland, providing a more thorough understanding of how Northern Irish companies are utilising eCommerce platforms, the markets that these companies are reaching, the challenges that they face and their perceived threats to operations.

Key Finding 1a

Companies in Northern Ireland are committed to new investment in eCommerce

Q. What industry does the organisation operate in?



Key Finding 1a

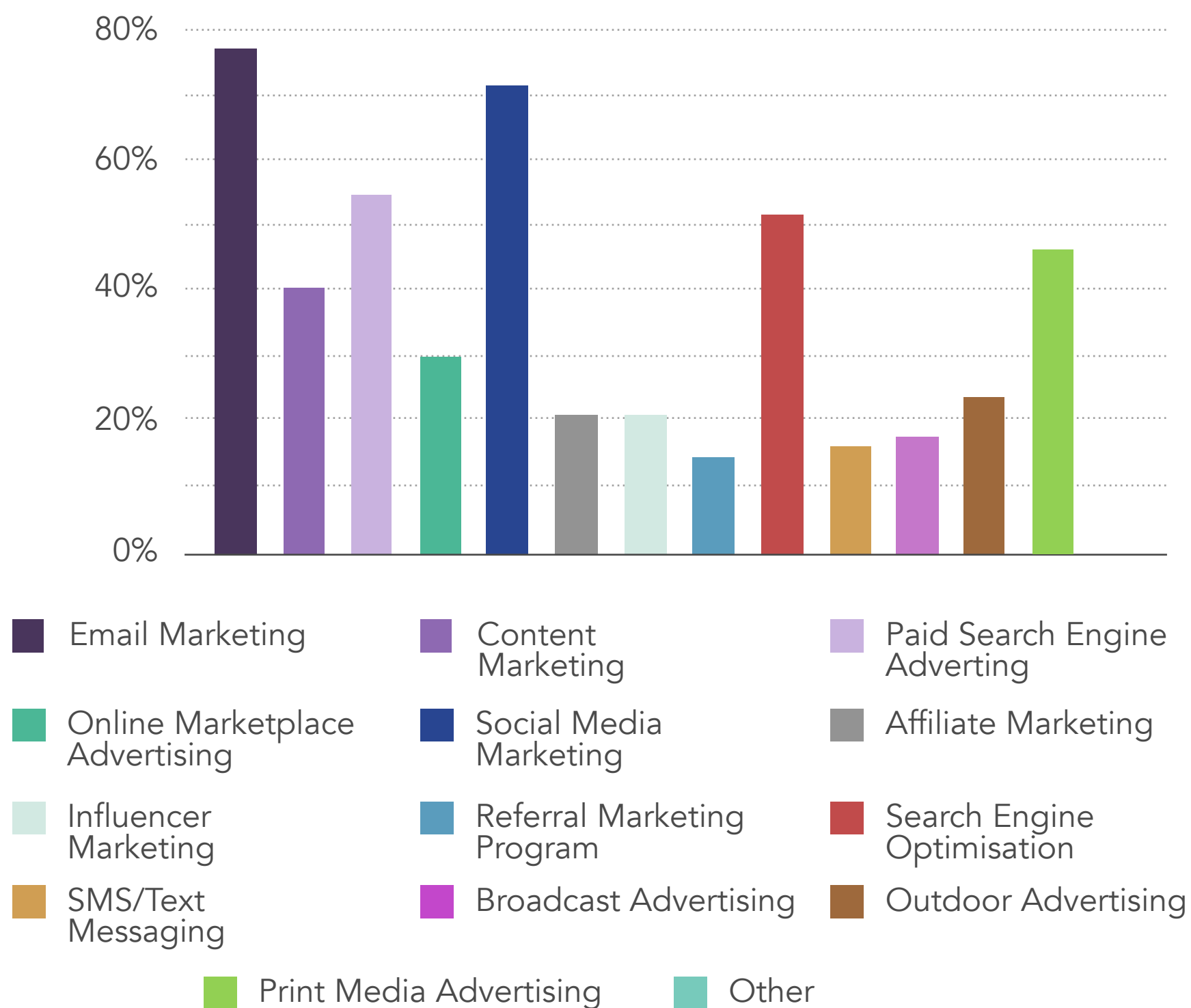
Q. What is your online strategy?



Key Finding 1b

Social media and email marketing are the dominant methods of promoting e-capability

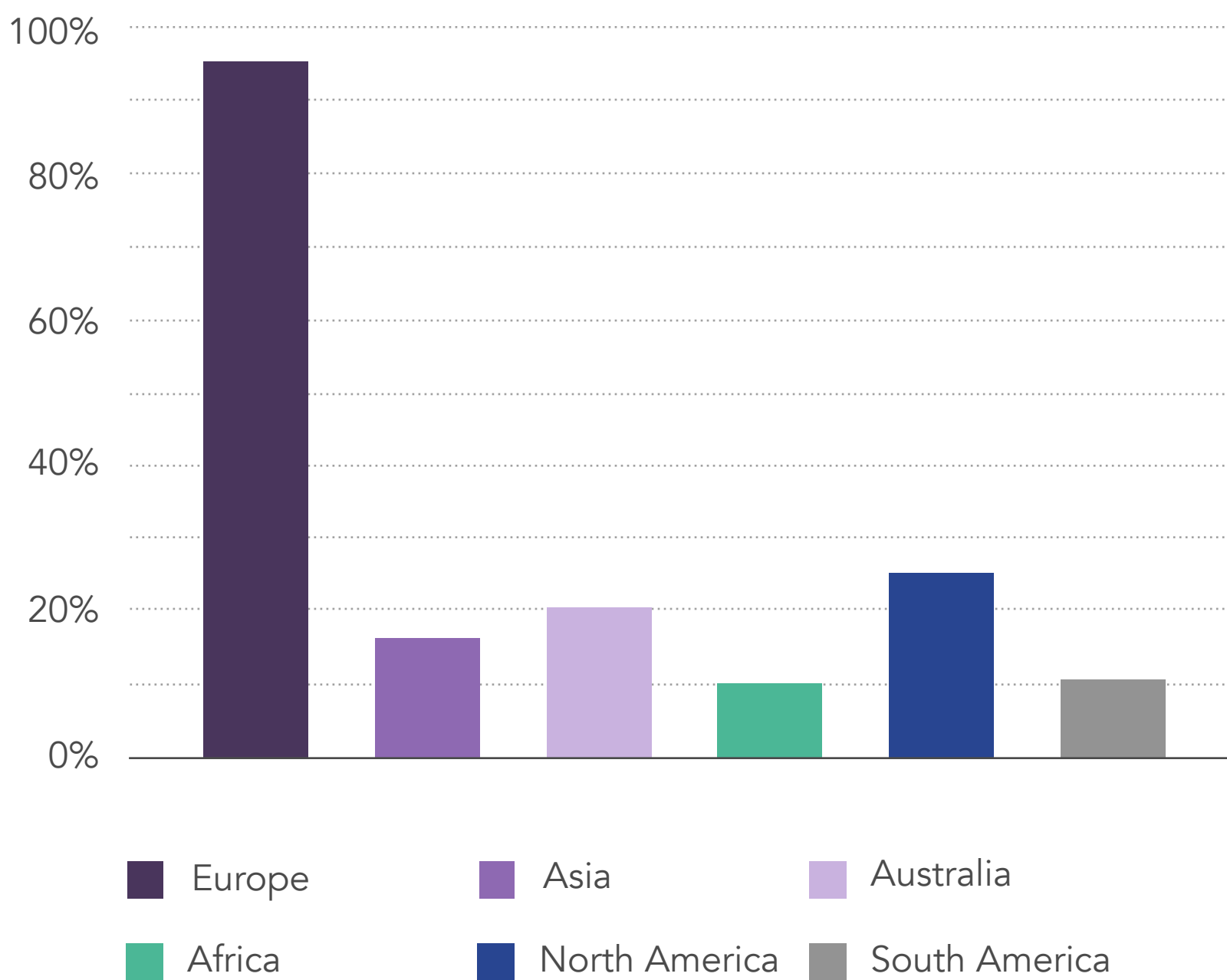
Q. What tactics are used to promote the e-capability?



Key Finding 2

Northern Ireland eCommerce is over-reliant on Europe with sales at 96%

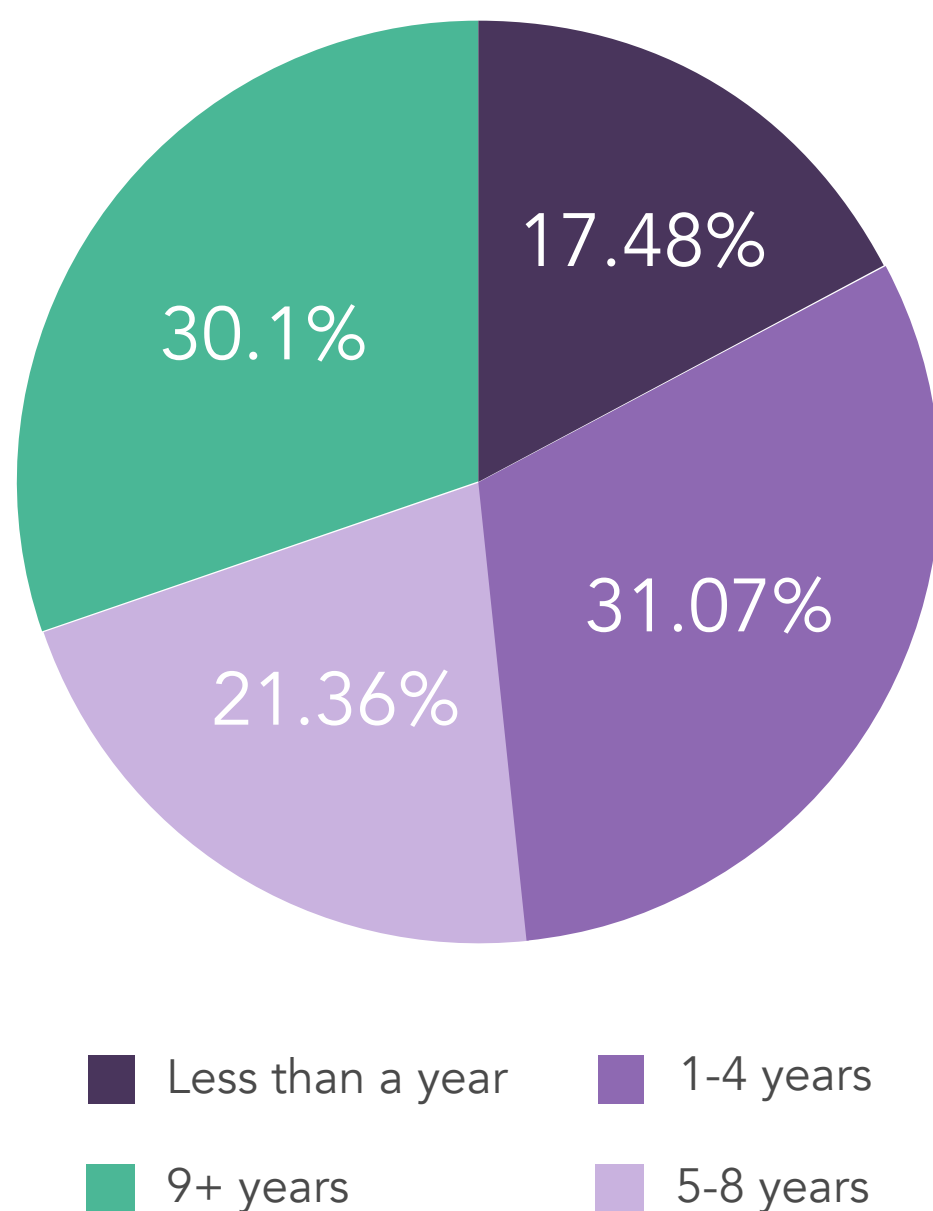
Q. Which market/s do you currently operate in?



Key Finding 3

A growing eCommerce sector with many established NI players

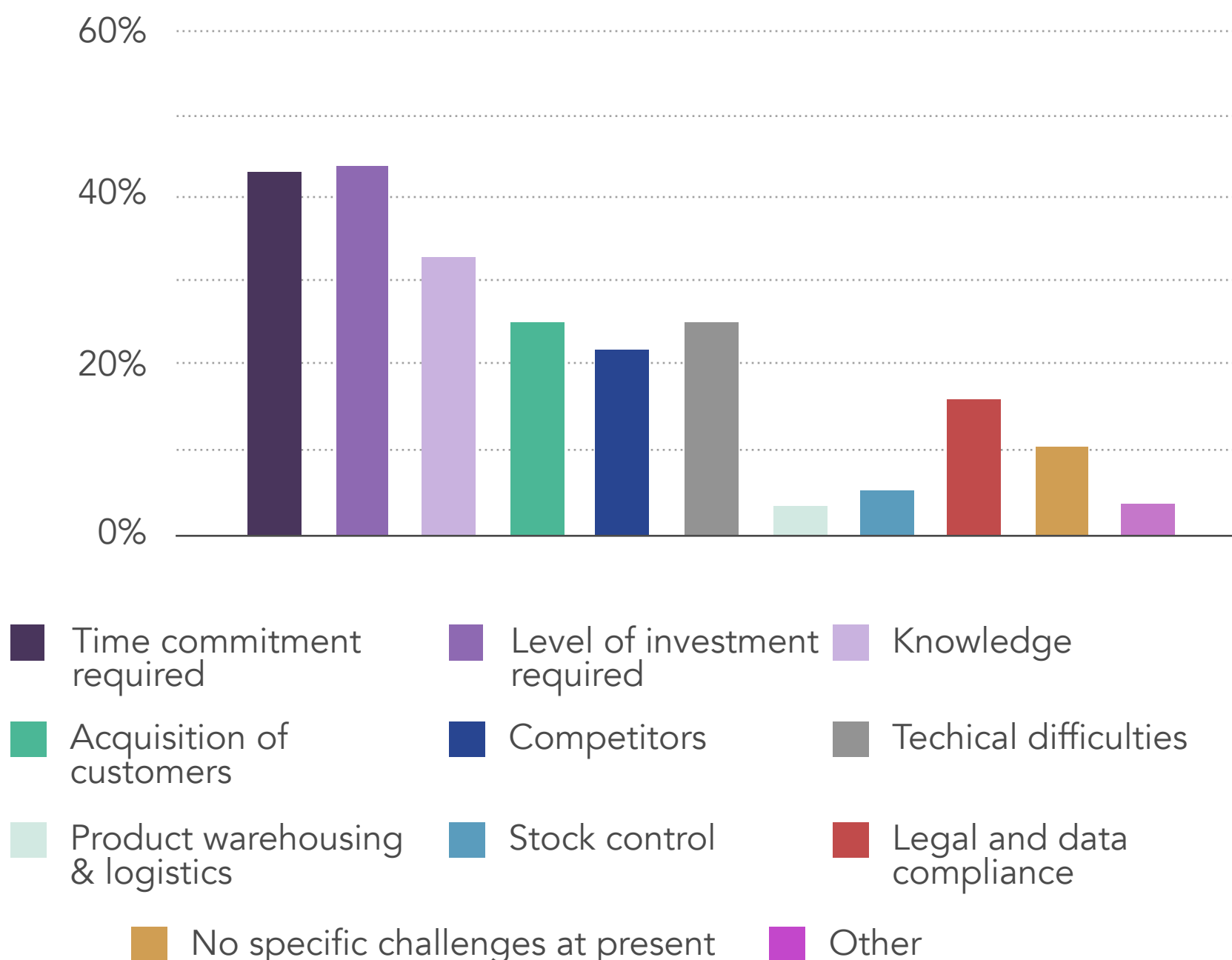
Q. How long has the organisation been operating with eCommerce?



The top 3 challenges to economic growth in Northern Ireland are...

- 1. Time Commitment
- 2. Level of Investment
- 3. Knowledge Deficit

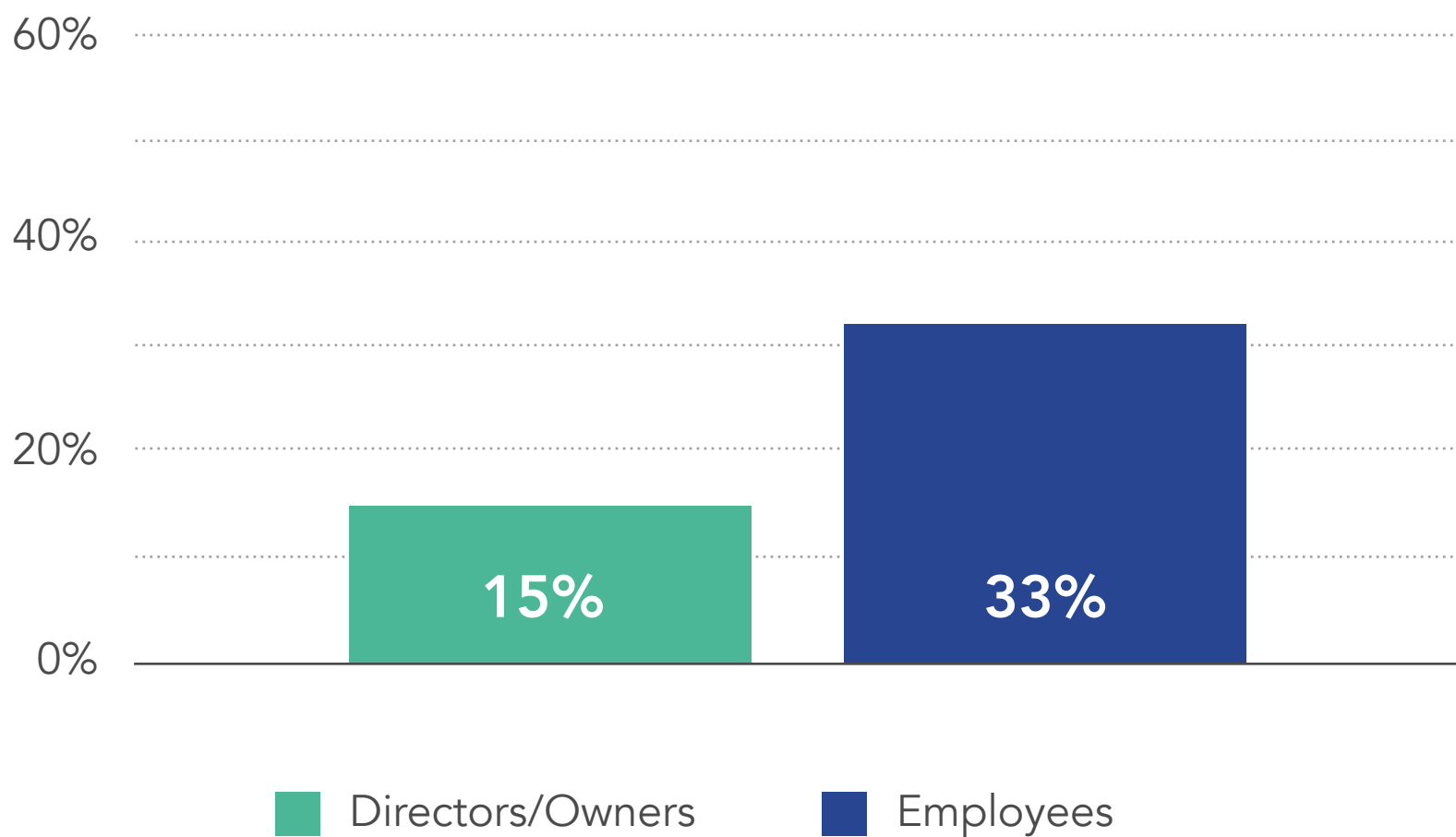
Q. Which of the following do you see as the most significant challenges to the organisation's eCommerce growth?



Key Finding 4b

'Acquisition of New Customers' is perceived to be more of an issue by employees than directors/owners

Directors and managers are not aware (or perhaps not as aware as they should be) of the difficulties of acquiring new customers when compared to their employees i.e. the 'workers on the front-line' as it were

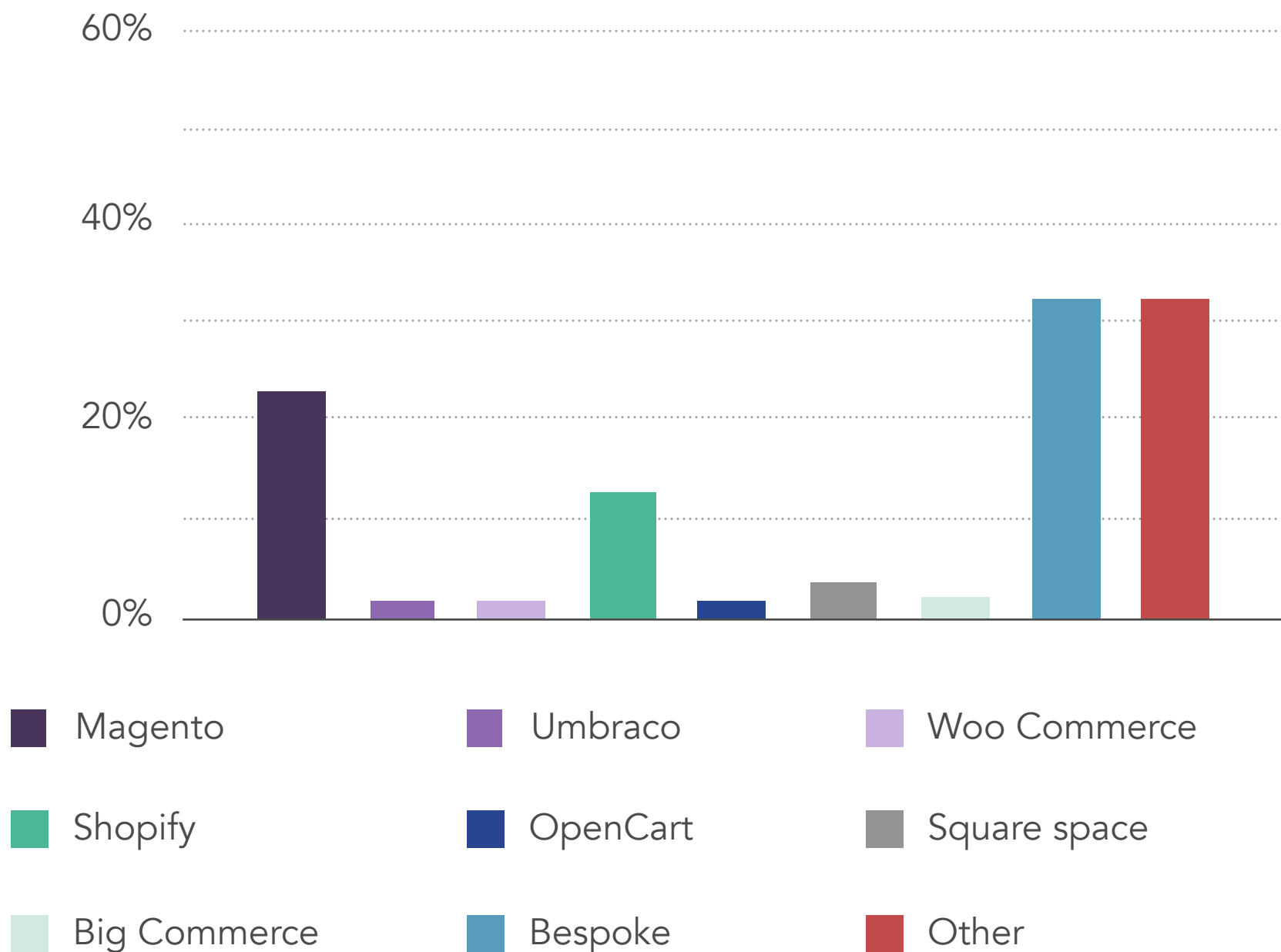


Acquisition of New Customers

Key Finding 5

NI is dominated by in-house or bespoke eCommerce solutions as opposed to established software platforms

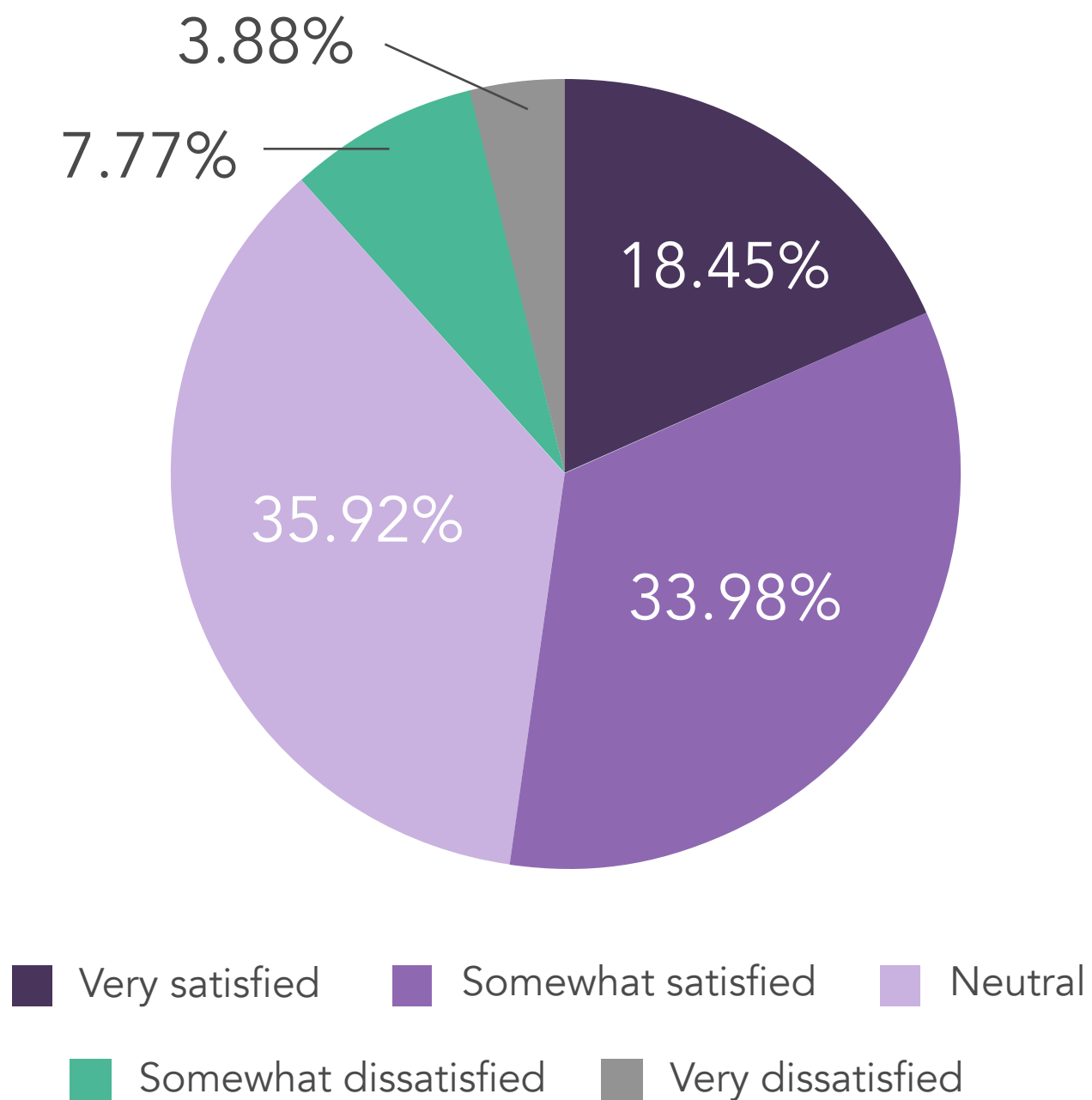
Q. What eCommerce platform/s does the organisation use?



Key Finding 6

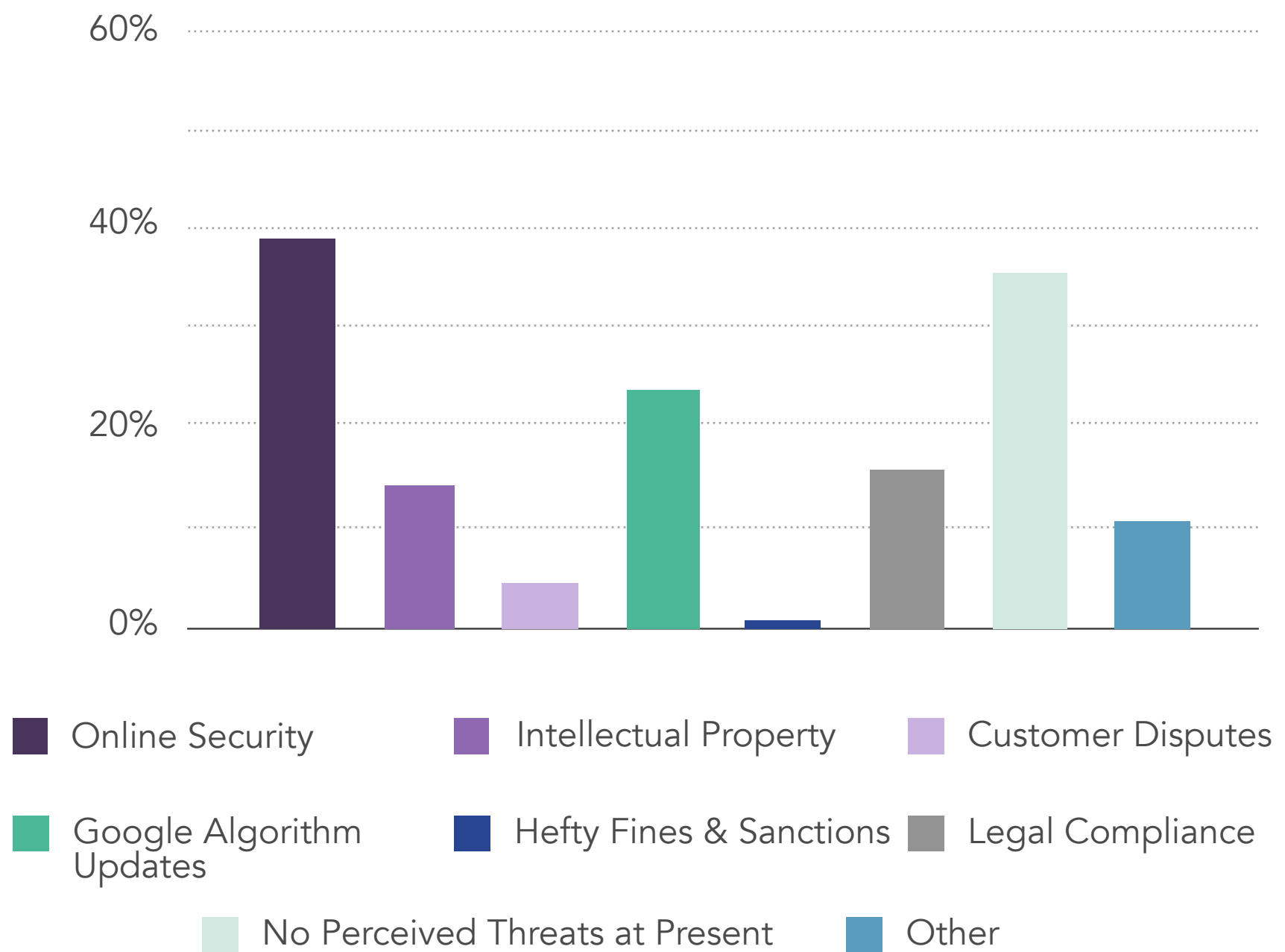
More than 50% of NI companies are satisfied with their eCommerce platform

Q. Which of the following best describes how satisfied you are personally with this eCommerce platform?



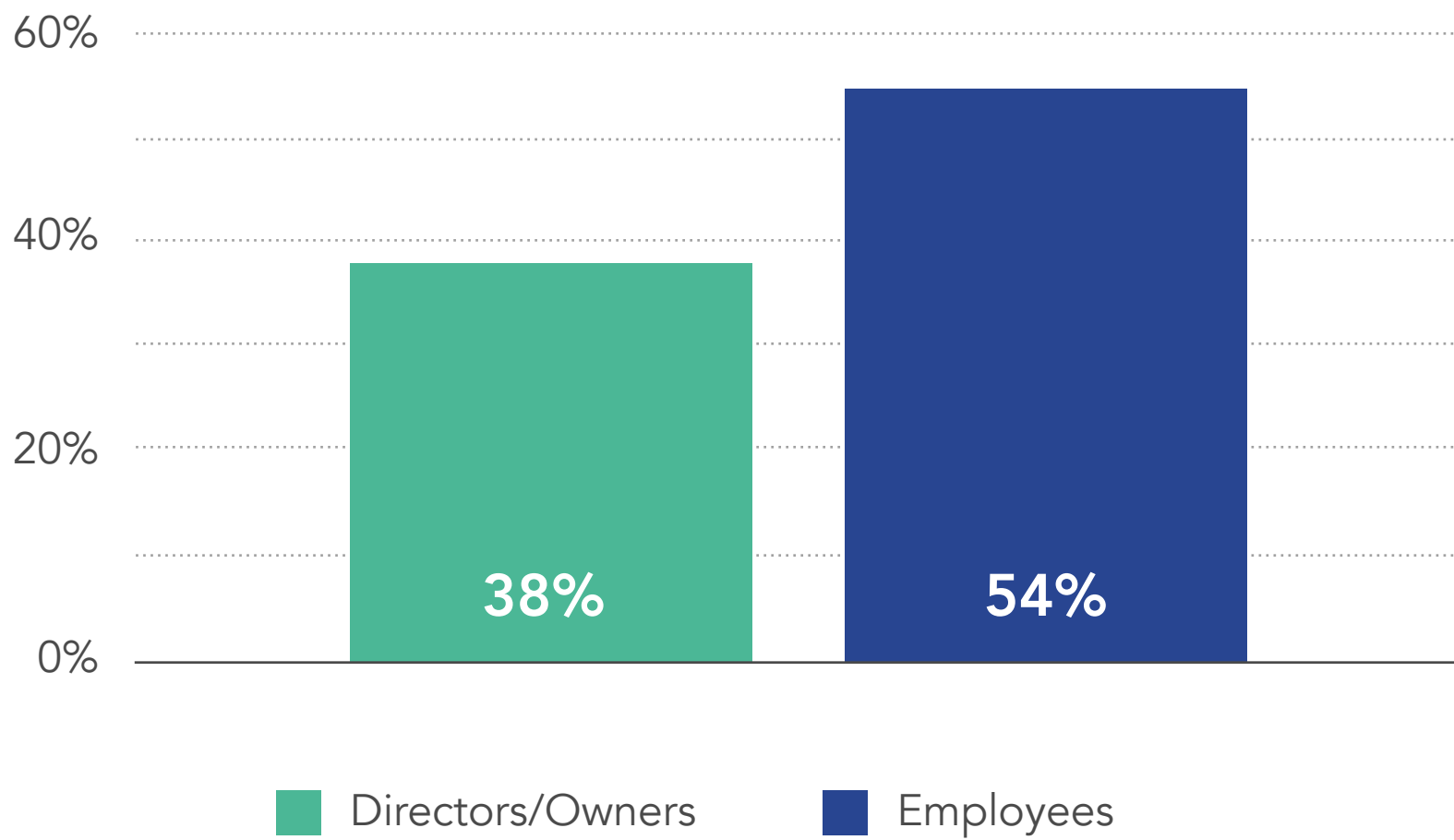
Online security is perceived as the most significant threat to eCommerce

Q. What is the biggest threat to the organisation's eCommerce operation?



Key Finding 7b

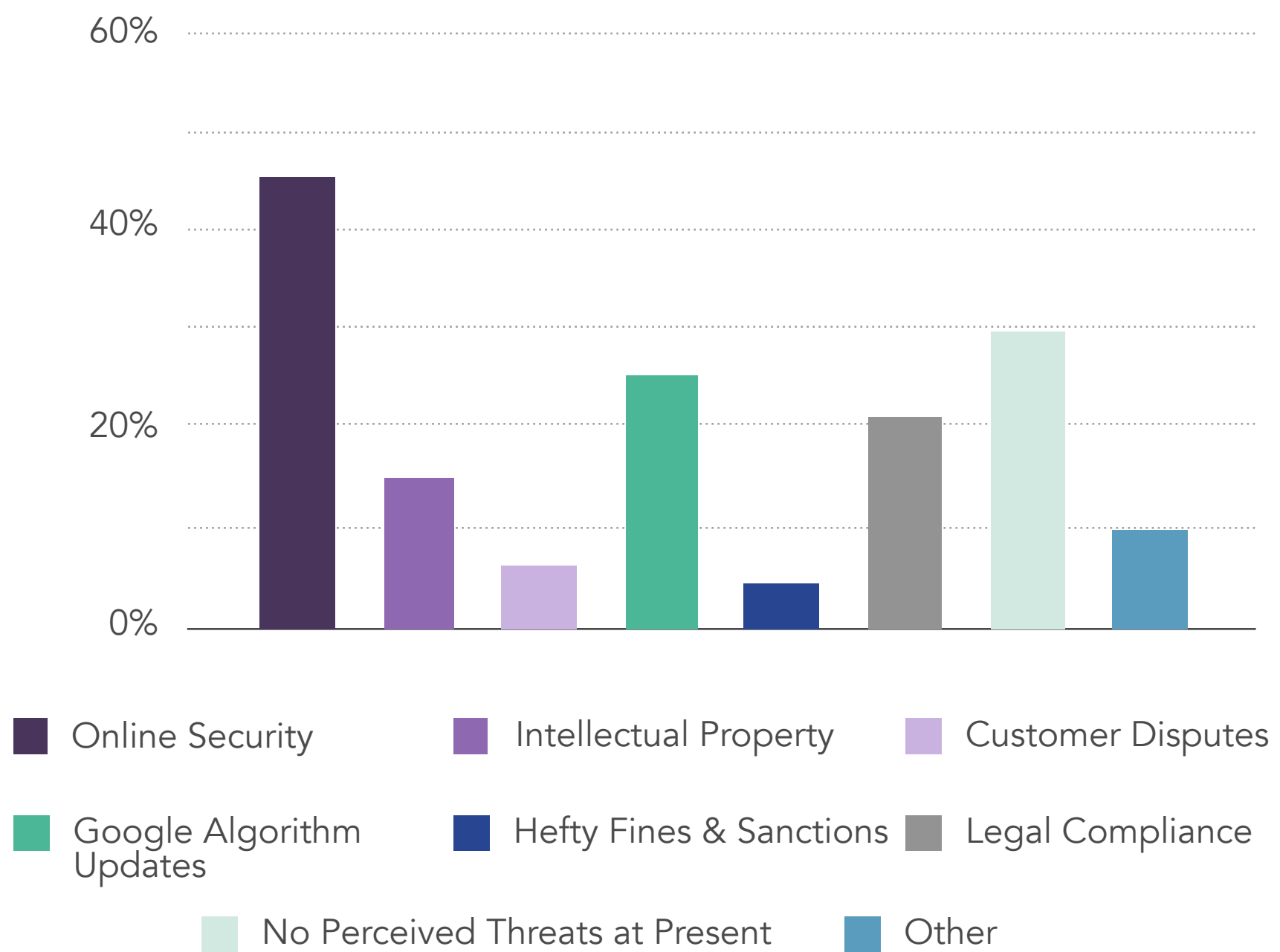
The employees perceive there is a bigger threat to online security than directors/owners.



Online Security

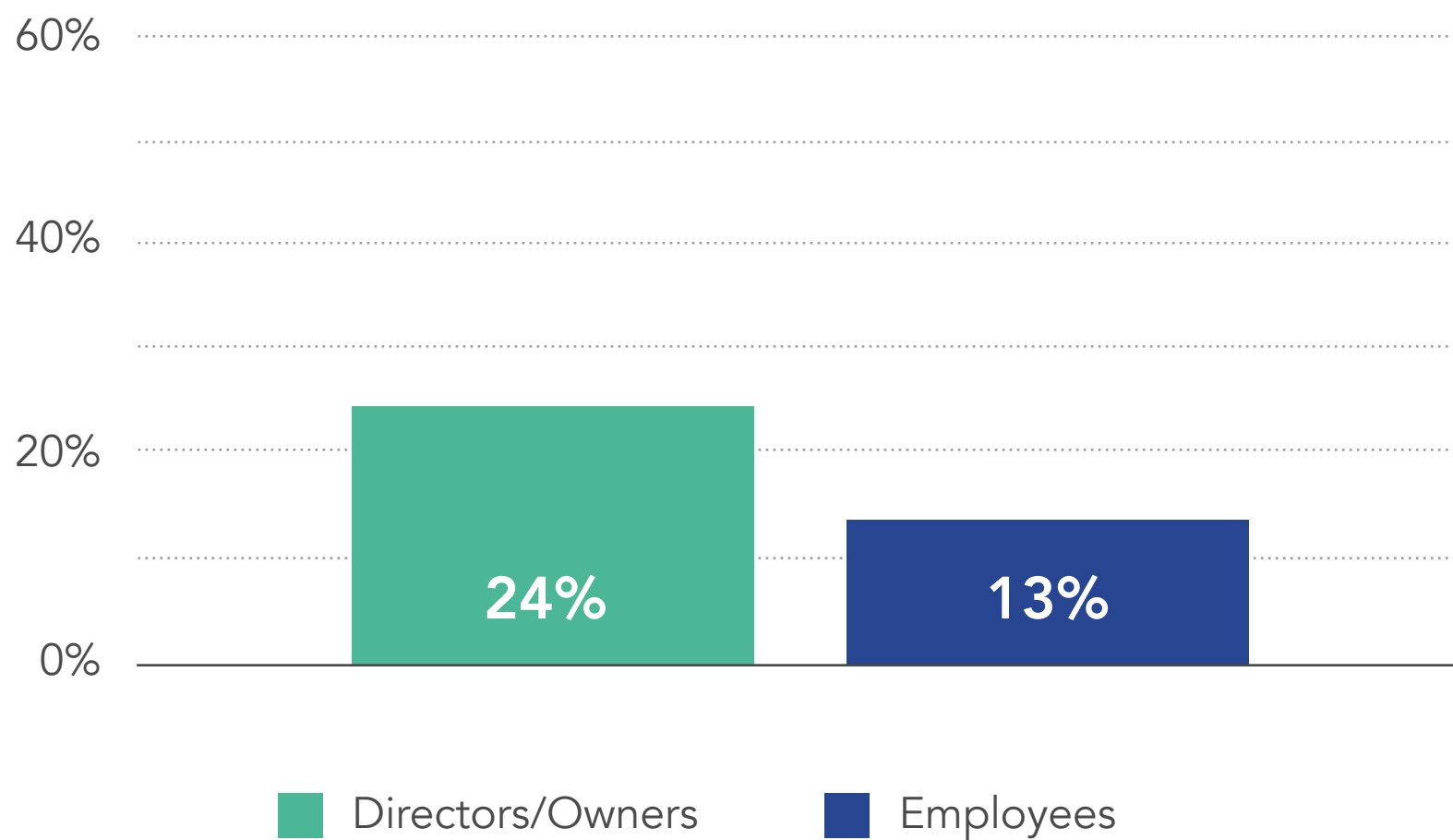
Other than online security, Google Algorithm Updates remain the biggest threat to an organisation's eCommerce operation

Q. What do you believe to be the biggest threat to the organisation's eCommerce operations?



Key Finding 7d

The directors perceive that Google Algorithm Updates are a bigger threat to e-Commerce than employees.

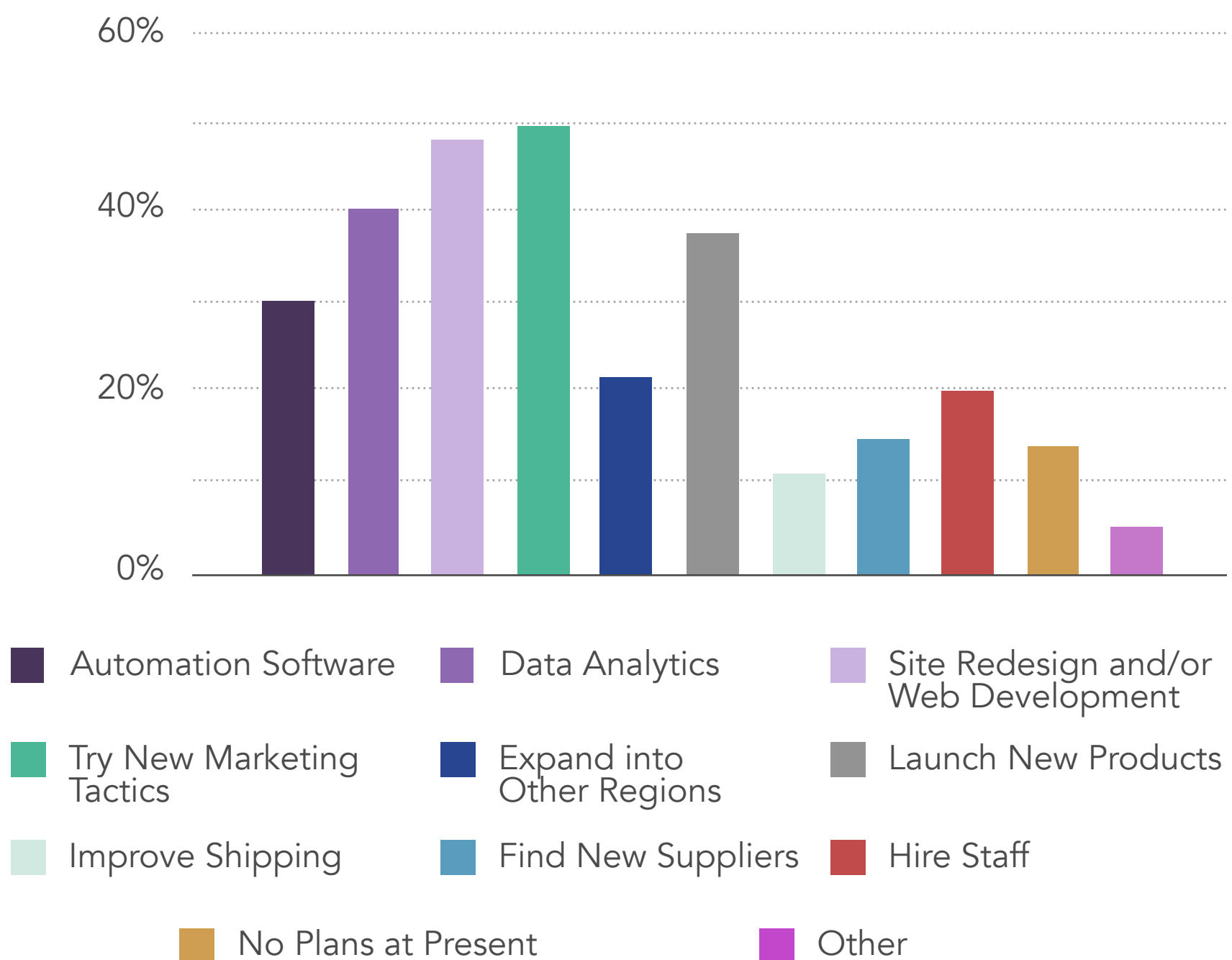


Google Algorithm Updates

Future plans for investment in eCommerce are:

1. New marketing tactics
2. Web design and development
3. Data analytics

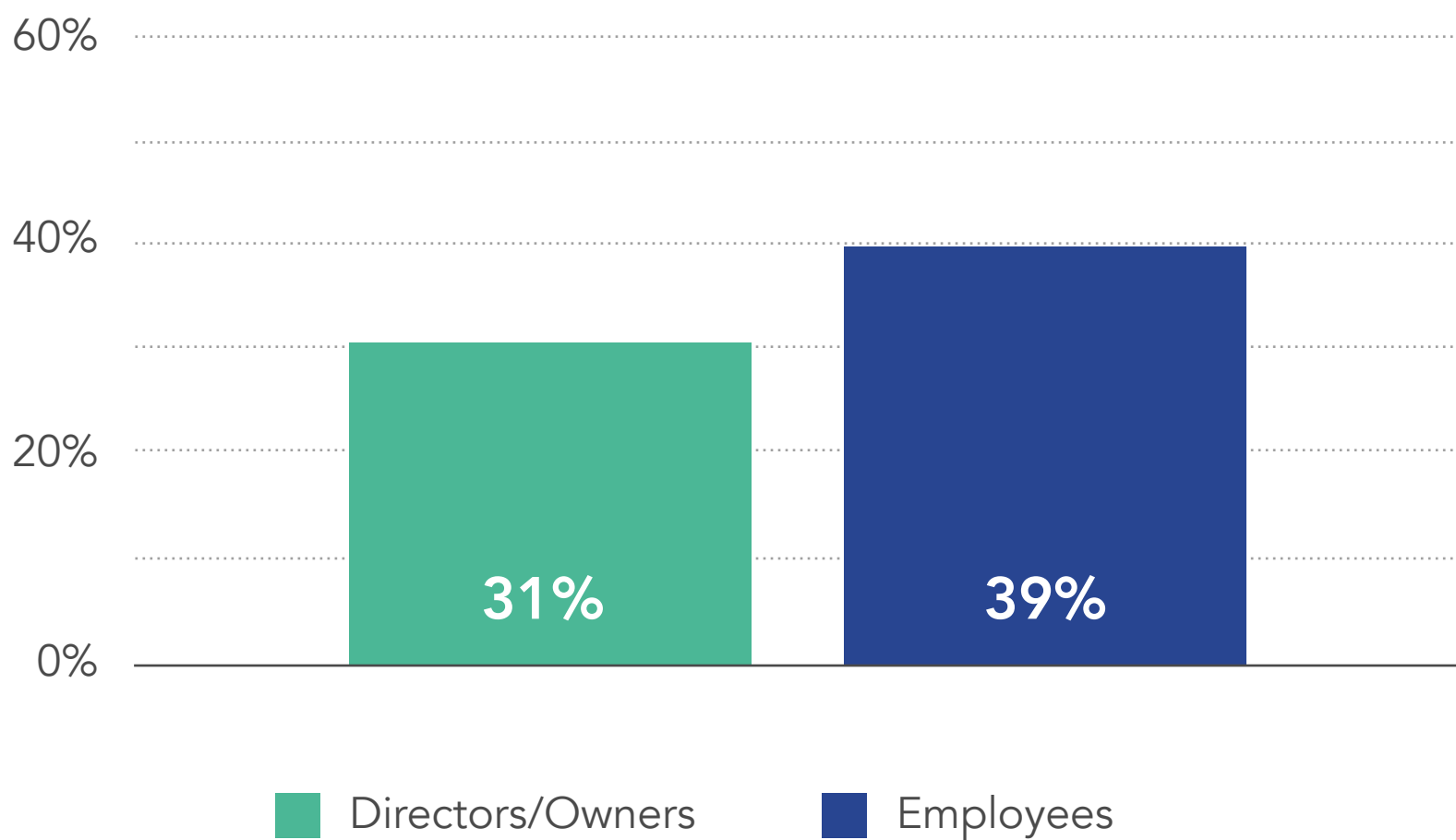
Q. How does the organisation plan to invest and advance in eCommerce?



Key Finding 8b

The need to launch new products is another key part of the companies plans to invest in eCommerce

Directors and managers rate this at 31% importance, whereas employees rate it at 39% importance. This could be based on direct interface i.e. employees with direct customer liaison every day sometimes get a better perspective on the way the market is moving and see the need for 'new products' earlier perhaps than the directors and managers of the company.



Launch New Products

Conclusion

This eCommerce survey is the first of its kind to examine the current state of the **eCommerce industry in Northern Ireland**. The findings will hopefully be of use to those already working within the sector but also to those wishing to incorporate online selling within their business in the near future.

The findings show a **highly active eCommerce sector** within Northern Ireland for years to come with many opportunities to operate on a truly global scale. Whilst there are a number of established players operating within eCommerce in Northern Ireland, it is still a growing sector - **17%** of businesses have been facilitating eCommerce for just less than one year.

With phishing cases, data breaches, fraud and even hacking becoming a common occurrence, it's not surprising that online security is a serious concern with over **47%** of respondents believing this was a potential threat to their eCommerce organisations.

Interestingly, the demographics analysed identified a **difference in opinion** between directors/managers and employees. Employees have expressed greater online security concerns and a need to invest in new products in order to advance.

Overall, the findings of this survey have been beneficial in terms of understanding the **local dynamics** of what is an increasingly competitive online landscape which is expected to thrive in 2019/20 and beyond.

Main Results Report

To view the complete version of the NI eCommerce Survey main results report please email or telephone the team:

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