



Singapore E-Commerce Survey

2009-2010

Report (Phase 1)

Simplified Version

> Survey URL :
http://ecommerce.org.sg/singapore_ecommerce_survey_2009_2010/

Table of Contents

1. About E-Commerce Association of Singapore	3
2. Report Summary	4
3. What's in the Full Report	8
4. Further Action	9

*If you haven't taken this survey, please participate now at:
http://ecommerce.org.sg/singapore_ecommerce_survey_2009_2010/ to
get future reports, as well as other exclusive offers.*

Partners:



Singapore E-Commerce Survey 2009-2010 (Phase 1)

1. About E-Commerce Association of Singapore

E-Commerce Association of Singapore (ECAS) is a non-profit organization registered in Singapore (Registration No. T09SS0255G). Its mission is to:

- 1) Improve Singapore companies' E-Commerce capability
- 2) Promote Singapore as a regional hub for E-Commerce transactions.

We offer 3 types of memberships:

Bronze Membership – Free to join. Suitable for individuals.

Sliver Membership - S\$199/Year. Suitable for SMEs.

Gold Memberships – S\$999/Year. Suitable for Vendors and Service Providers.

ECAS provides exclusive benefits to its members together with our partners.

**All members enjoy 20% discount for below two events.
Email to marketing@ecommerce.org.sg to get your tickets.**

Event Name: [The Internet Show 2010 – Asia's only internet business event](#)

Time & Venue: 21-22 April, 2010, Suntec Singapore

The Internet Show is a series of seminars and a showcase. It is the only event that brings together Big, Medium and Small business, all eager to find new ways of doing internet business. It is a **business** not a technology show.



THE Internet Show Asia's only internet business event
21-22 April 2010, Suntec Singapore, Level 4, Hall 401
ECAS members get 20% discount for The SME Internet Summit 2010

Pre-register today for your FREE access to the seminars!

Event Name: [ad:tech Singapore 2010 – The 3rd Interactive Advertising and Digital Marketing Exhibition and Conference, Asia](#)

Time & Venue: 3-4 June, 2010, Suntec Singapore

ad:tech Singapore 2010 is a regional event for the interactive marketing community. ad:tech brings together brand advertisers, traditional & interactive agencies, portals, on-line publishers and technology providers.



Asia's leading interactive advertising and digital marketing event 3 & 4 June
ad:tech singapore 2010
suntec convention centre

ECAS members get 20% discount – register using promo code: cdF11b9

2. Report Summary

2.1 Above the survey

Singapore E-Commerce Survey 2009 -2010 (http://ecommerce.org.sg/singapore_ecommerce_survey_2009_2010/) is initiated by E-Commerce Association of Singapore (<http://www.ecommerce.org.sg>), a non-profit organization to improve Singapore companies' E-Commerce capabilities. The whole survey will start from Jan 2010 and will last for 4 months. All participants will get a summary report so that they can have a clearer understand of their e-commerce status compared to industry peers.

This is the 1st phase of the survey report and release only partial results. Full results are only available to ECAS Gold Members.

2.2 Findings Highlights

Revenue from E-Commerce

While most SMEs agree Singapore's overall E-Commerce level is good and understand the importance of conducting E-Commerce, they are apparently not satisfied with their own E-Commerce capabilities. **For more than half of the participants, revenue related to E-Commerce (directly or indirectly) accounts for less than 10% of their overall revenue.**

E-Commerce requirements

SMEs have clear and specific requirements for e-commerce features on their website like **shopping cart, booking system and payment system** where a better online payment system is of bigger interests. They are also interested in having emerging features like mobile site and live casting on their website.

Costs

SMEs are **price-sensitive to both implementation cost and operational cost.** Due to budget and knowledge limitation, they are facing challenges during implantation or enhancement of their online presence.

Budget

SMEs expect online marketing as a channel to reach wider audience at lower cost. As a result, they are **not prepared to allocate big budget for online marketing.**

Lack of knowledge

Furthermore, **the lack of knowledge and measurability** (in SMEs minds) are the biggest challenges for SMEs to conduct and benefit from online marketing.

Internet marketing channels

Out of all online marketing channels, **search engines remain the most effective, but also the most costly.** Emails are also effective while costing much less. Local search engines, blogs and social media are deemed as inexpensive but somewhat effective alternatives. But these have a much lower adoption rates. B2B platforms are not popular among Singapore SMEs.

SMEs need assistance

SMEs need third-party's help (e.g. ECAS) to recommend **affordable and effective E-Commerce solutions organize educational workshop and conduct online marketing.**

Singapore E-Commerce Survey 2009-2010 (Phase 1)

2.3 Survey Data (partial)

2.3.1 Participant Profiles

Survey participants are a well balanced mix of SMEs across different industries in Singapore, where the most respondents are from retail (15%) and travel (14%) followed by manufacture (9%), IT services (9%), business services (3%), food (3%), education (3%), consulting (2%), trading (2%) and media (2%) etc. Most participants are SMEs with less than 10 staff (60%) and revenue below 1 Million SGD (54%).

2.3.2 Domain Name and Hosting

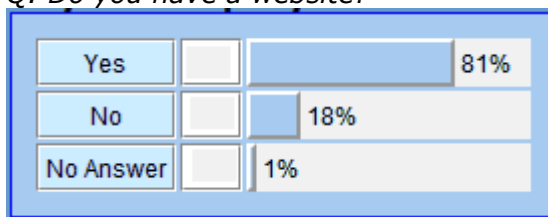
53% of participants are using sg domains (.sg, .com.sg, .net.sg, etc.). The deciding factors for them to choose a domain provider is support (23%) and price (22%).

2.3.3 Websites

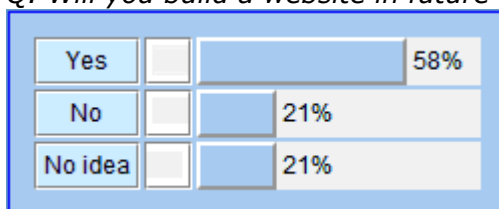
a. Website is a must-have for business.

Most participants already have a website (81%) and even for those without a website; most (58%) will build one in future at a limited budget however, where 65% are willing to spend less than S\$3000 to build one.

Q: Do you have a website?



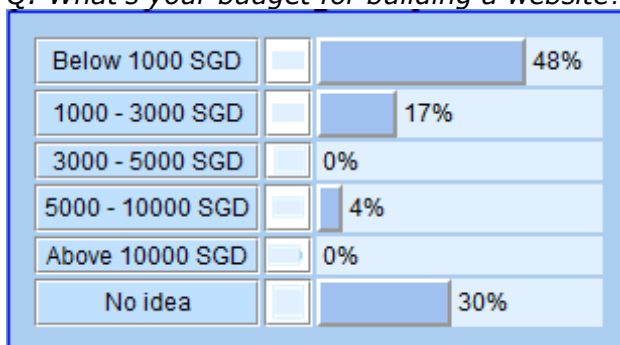
Q: Will you build a website in future (for those without websites)?



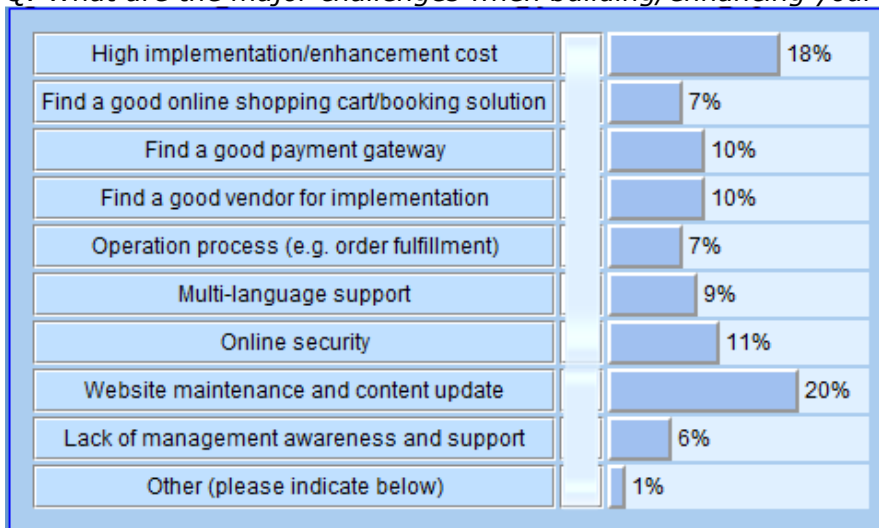
b. SMEs are price sensitive to website building/enhancing.

According to the survey, the biggest challenges for building or enhancing their website are website maintenance and content update (20%), which is associated with operation cost, as well as high implementation/enhancement cost (18%)

Q: What's your budget for building a website?



Q: What are the major challenges when building/enhancing your website?



c. Adoption of E-Commerce is still low. Online payment is of interest.

For more than half of all participants (53%), E-Commerce related revenue accounts for less than 10% of their overall revenue.

2.3.4 Online Marketing

a. Search Engine, Email and Classified remain the most popular online marketing channels.

Search Engine takes the lead, followed by email and classified.

b. Search engines are still effective, but costly.

Email, on the other hand, is a little less effective than search engine but cost much less. Classified and Directory Listing are almost the same costing as search engines, but are least effective, compared to search engines and email.

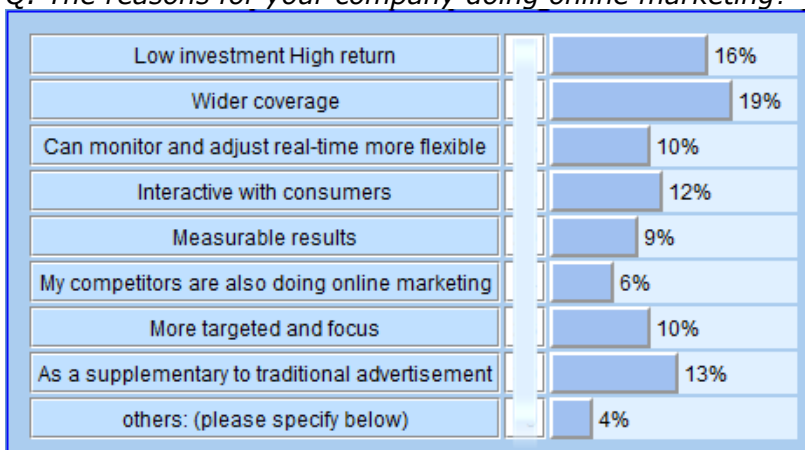
c. No big spending on online marketing.

60% of participants have less than S\$5000 yearly budget for online marketing.

d. Go online for wider coverage and higher ROI.

Wider coverage (19%), followed by higher ROI (13%) and supplementary to traditional advertising (13%) are top three reasons for online marketing.

Q: The reasons for your company doing online marketing?



e. B2B Platforms are not popular.

Less than 20% used any B2B platforms to promote including alibaba, globalsource and buysingapore.

2.3.5 Overall Experiences

Most participants think the overall E-Commerce level of Singapore is Good (44%) with minor objection (4%). However they are NOT feeling the same for their own company’s E-Commerce level where only 26% feel good, with similar amount of objection (21%).

2.3.6 Expectation to ECAS

The top three areas where SMEs hope ECAS can come in to help are: “Provide affordable one-stop e-commerce solutions and consulting service” (19%), “ Help conduct online marketing “(17%) and “Organize seminars/workshops for networking “(15%)

Q: What aspects do you think ECAS (E-Commerce Association of Singapore) can help you in future?



3. What's in the Full Report

The full report will contain much more info than the simplified version. For example,

1. In the full report there will be 33 charts, compared to 6 in the simplified version.
2. The full list of features ranked by popularity related to E-Commerce and online marketing
3. The full range of budgets acceptable for SMEs to build a website, to enhance certain features, to buy a domain name or hosting service, as well as to conduct online marketing
4. The list of challenges faced by SMEs in term of website-building, online marketing, domain hosting, online transaction and payment.
5. The list of vendors ranked by popularity in various sectors like hosting, online marketing, payment etc., as well as areas where SMEs are expecting better services from the vendors.
6. Detailed and complex comparison charts among various E-Commerce features stating which are most popular currently and which are most demanded in the future
7. Detailed and complex comparison charts among various online marketing channels stating which are most popular, which are most costly and which are most effective.
8. And a lot more...

The full report is only available to ECAS gold members.

4. Further Action

E-Commerce Association of Singapore (ECAS) will continue working with various organizations to have more SMEs to take part into this survey to have a wider coverage and more concrete conclusion.

Meanwhile, ECAS will work with industry partners and vendors to provide better and more affordable e-commerce solutions, conduct e-commerce seminars and workshops to the public, as well as help SMEs to conduct online marketing.

If you are interested to be our partner, please contact us at enquiry@ecommerce.org.sg.