

IO1/A2 – Survey report: Portugal

Date (21. 07. 2021)

Glossary

EU	European Union
PEACOC	Personalised e-Business Coaching for Construction SMEs
SME	Small and Medium-sized Enterprise

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1 Methodology

This report represents IO1/A2 of the PEACOC project, which is the follow-on activity to IO1/A1. In IO1/A1, the project consortium produced a number of national reports about the state of the construction industry and e-commerce in each of their countries. This activity attempts to validate the findings of those reports through engagements with stakeholders in these areas.

As such, partners sent out specifically-constructed surveys to stakeholders in each of their countries, and received back a number of responses. This document presents these responses for the given country with the corresponding analysis and draws whatever conclusions are evident from the results.

2 Introduction

A total of 19 Portuguese companies from construction sector have answered the questionnaire.

All individuals are over 35 years old: 47% are aged between 45–54 years old; 37% between 35-44 years old; 11% between 55-64 years old and 5% between 65-74 years old (see figure 1).

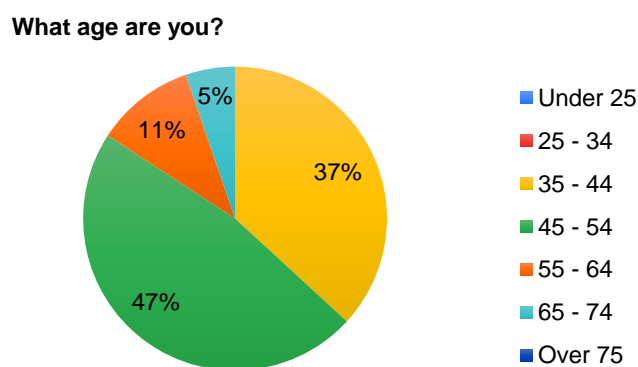


Figure 1: Age ranges of Portuguese individuals who answered the questionnaire.

3 Which of these best describes the business you represent?

Figure 2 presents the results according to the type of companies included in the Portuguese survey. Most respondents represent SMEs from construction sector (53% from small-sized and 26% represent medium-sized construction companies). The remaining results are included in the group of big construction companies (11%) and small companies from other sectors (10%) but also related to the construction industry.

Which of these best describes the business you represent?

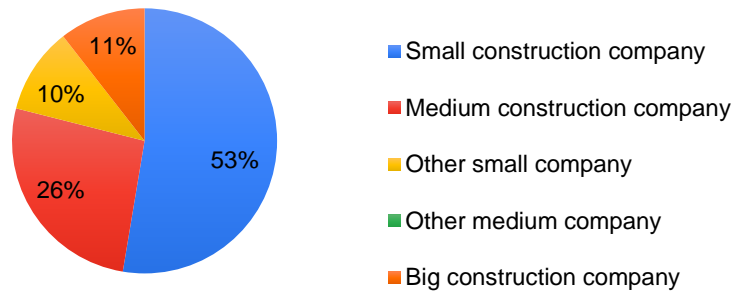


Figure 2: Type of companies represented by Portuguese respondents.

4 Does your company do much business internationally?

Figure 3 gives some information about the internationalization of the Portuguese companies that participated in the survey. Most Portuguese respondents refer that their company does business internationally: 53% consider doing a little business internationally and 31% consider doing a lot of business internationally. The remaining respondents admit to doing only national business.

Does your company do much business internationally?

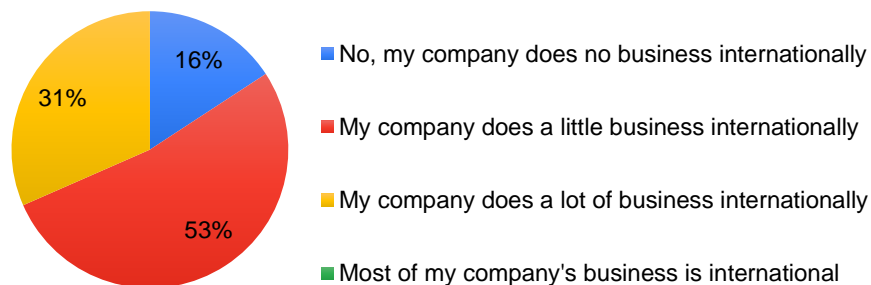


Figure 3: Information on the internationalization of surveyed Portuguese companies.

5 How does your business use e-commerce?

Figure 4 gives an overview of the use of e-commerce by the surveyed Portuguese companies. The results show that 95% of the companies have a website, 32% of the companies uses electronic document management but only a very small part of the surveyed companies have an online store (11%) and an online tool that can offer quotes (11%). 11% refer being part of a broader digital platform or marketplace and other 11% of the companies do not use e-commerce at all. 5% mentions using social networks for e-commerce.

How does your business use e-commerce?



Figure 4: Use of e-commerce by surveyed Portuguese companies .

6 Which of these do you feel are factors preventing entrepreneurs from adopting new e-commerce tools and behaviours?

Figure 5 presents the main factors pointed out by Portuguese respondents as factors that prevent entrepreneurs from adopting new e-commerce tools and behaviours. It can be observed that most respondents believe that Portuguese business culture and habits is the most relevant factor affecting the growth of e-commerce in Portuguese companies (68%).

Also, the lack of short-term return on investment (58%) and the cost and complexity of technology involved (53% and 42%, respectively) are other factors that prevent Portuguese entrepreneurs from adopting new e-commerce tools and behaviours. 37% of the surveyed companies refer the need of training their employees as one of the aspects that affect the use of e-commerce on their businesses. Likewise, data protection or security issues, and other aspects such as time and effort required for the digitalization of the existing data and records, strongly condition the implementation of e-commerce. A small percentage of respondents still consider as conditioning factors: the excessive bureaucracy associated with e-commerce; the aged and inflexibility of the construction market and the preservation of most usual sales channels.

Which of these do you feel are factors preventing entrepreneurs from adopting new e-commerce tools and behaviours?

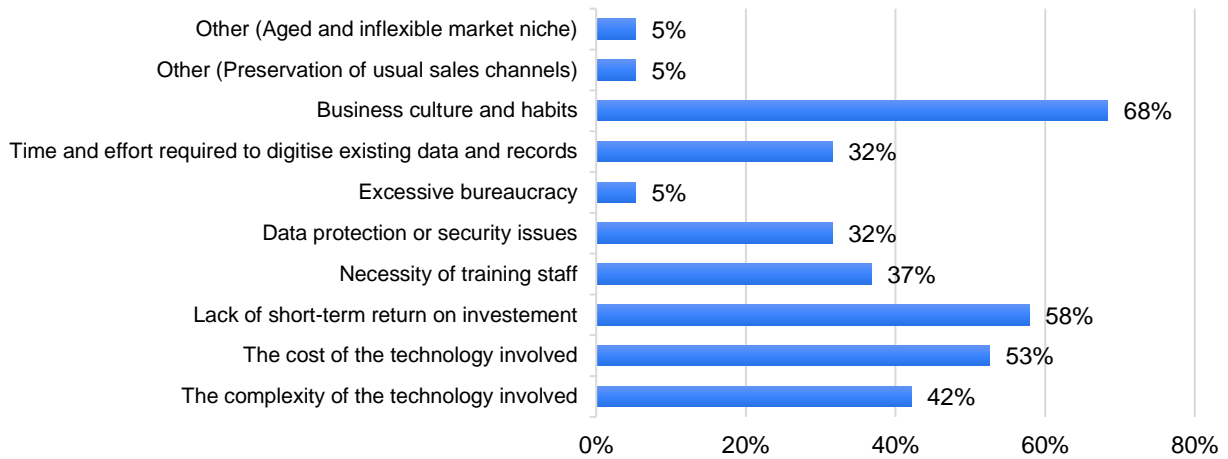


Figure 5: Factors that prevent entrepreneurs from adopting new e-commerce tools and behaviours.

7 Do you feel that there is good training and support on e-commerce in construction in your country?

Figure 6 presents the construction companies perspective regarding the existence of good training and support on e-commerce in Portugal. 47% of the Portuguese respondents refer the lack of support for e-commerce or digitalization in their country. 37% says that there are courses and support on e-commerce and digitalization, but not specifically for the construction sector. Only 16% of the companies are aware of the existence of good courses and support on e-commerce in construction.

Do you feel that there is good training and support on e-commerce in construction in your country?

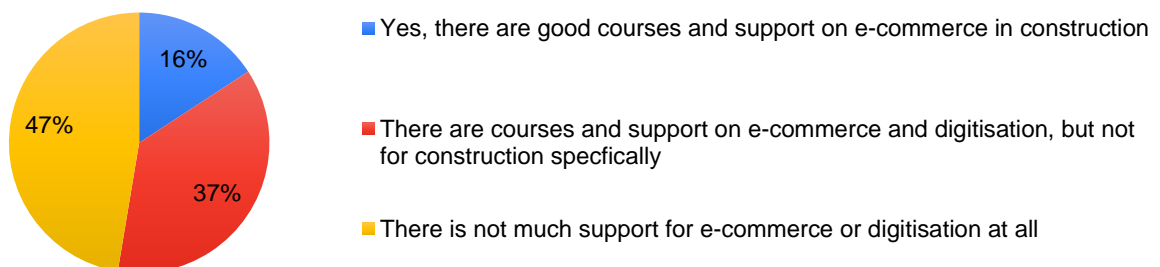


Figure 6: Companies perspective regarding the existence of good training and support on e-commerce in Portugal.

8 To what degree do you think consumers in your country trust online payment?

Figure 7 gives the Portuguese respondents' point of view regarding the trust of Portuguese consumers in online payment. Almost three quarters of respondents believe that most Portuguese consumers trust online payment; 21% says that only some consumers trust online payment in Portugal and only 5% claim that Portuguese consumers do not trust in online payment.

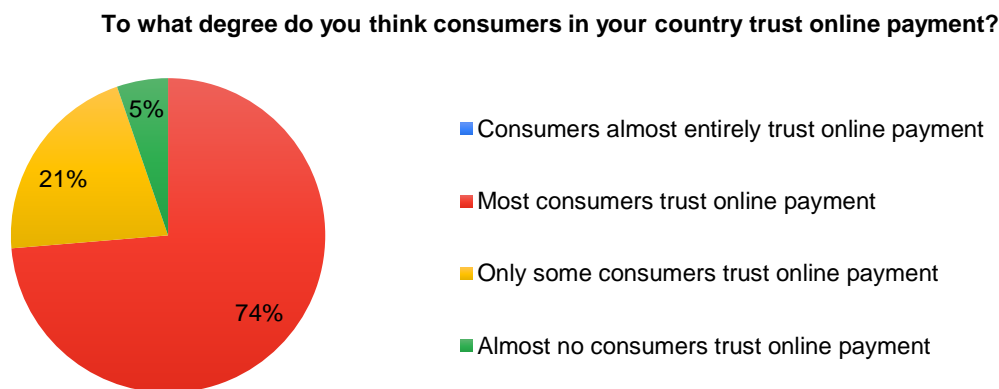


Figure 7: Trust of Portuguese consumers in online payment (respondents' opinion).

9 Conclusions

A questionnaire was sent to several companies from construction sector, most of them SMEs (89%), to get some general information about the use of e-commerce. 19 companies answered to the questionnaire. All respondents are over 35 years old and more than half have more than 45 years old.

The answers to the questionnaire show that more than 80% of the surveyed Portuguese companies do business internationally.

Most companies do not use e-commerce, only having a website and/or using electronic document management. 11% refer being part of a broader digital platform or market instead of having their own platform/software.

The following factors are pointed out by Portuguese respondents as the main factors that prevent entrepreneurs from adopting new e-commerce tools and behaviours: Portuguese business culture and habits; the lack of short-term return on investment; the cost and complexity of technology involved and the necessity of training staff.

The most of Portuguese respondents also refer the lack of support for e-commerce or digitalization in Portugal and a significant part consider that the existing courses and support are not specifically for the construction sector.

Most respondents consider that Portuguese consumers trust online payment and so this is not a factor affecting the implementation of e-commerce.