

# IL CONSUMATORE DIGITALE E L'E-COMMERCE

Qualified Home Delivery  
L'evoluzione della supply chain dell'elettronica di consumo

**Roberto Liscia**  
Presidente Consorzio Netcomm

netcomm 





11 novembre 2014, Principe di Savoia Milano

**Roberto Liscia**

*Presidente Consorzio Netcomm*

## **"Qualified Home Delivery" Il consumatore digitale e l'e-commerce**

Soci Netcomm

eJero

CartaSi

360pon

6sicuro risparmio assicurato

[SmartOttica]

ebay

accenture High performance. Delivered.

docdata

saldiprivati

ARREDATUTTO.COM

FVS SERVICES ITALIA

Goolys DESIGN ONLINE

CRIBIS A CRIF company

D&B

San Marino Mail MAIL AND PARCEL BROKER

attrezzi utensili.it

Borgione più di 1 bambino su 2 utilizza i nostri prodotti a scuola

VoDo TRIBE MARKETING

Luminalpark

casatutto

SHOPPINGDONNA.IT

LOVETHESIGN BE COOL, STAY HOME

HUMANITAS RESEARCH HOSPITAL

NStore.it New Technology Shop

mykidz

zalando Il tuo negozio di scarpe online

best my option liberi di cambiare

QVC IL CANALE PER CHIAMA LO SHOPPING

artera artera.it

GRUPPO SINERGIA

EBA CLEARING

Groupalia tutta un'altra vita

triboo digitale

CHASE Paymentech™

KIABI la moda a piccoli prezzi

nexive

FRATELLI Carli - DAL 1911 -

Kamiceria

every pack

fifty FORTY and market

Sit ARREDA CON UN CLICK www.siediitalia.it

KVSTORE IL TUO BAGNO IN UN CLICK

GameStop POWER TO THE PLAYERS™

vente-privee.com

zoorate voice to the customers

SCONTI DIGITALE

gm

MAXI SPORT www.maxisport.com

ibs.it internet bookshop

iPAYst slide to pay.

Poste mobile

MONDADORI

Google

movin.com sharing the future

mybrandz

modomodo

privalia \*

LOVetaly Alla ricerca del buon cibo.

ePRICE

G.F. NARCISI Il tuo clima di casa. Dal 1993.

seat-g PAGINE GIALLE

GIORDANO

fesal.com worldwide trading

Act Value EMPOWERING YOUR BUSINESS

BAX

IMETEC

OSOSTORE.COM Passione per la Moda che Osa

photobx.it

RAJAPACK REAL N°1 EUROPEO DELL'IMBALLAGGIO

smart OFFICE L'ufficio high quality, low cost.

INTESA SANPAOLO

sevenlike

Expedia.it Viaggia a modo tuo

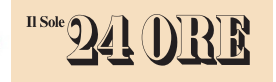
Gruppo Posteitaliane Postecom

skebby cloud sms solutions

DHL SUPPLY CHAIN

netcomm IL COMPAGNO DEL COMMERCIO ELETTRONICO ITALIANO

# Soci Netcomm





# Netcomm

✓ Sigillo Netcomm



✓ Netcomm ecommerce Forum



3.500 partecipanti, 45 workshop

✓ Ricerche di mercato



✓ ECommerce Europe



16 paesi rappresentati

✓ Lobby, legale, regolamentare e fiscale



✓ Formazione e consulting nel digitale



Dalla strategia al marketing e roll out di progetto

## Il marchio di qualità europeo per favorire le vendite





Average spending per e-shopper  
€ 857

Asia-Pacific	€ 406.1 bn	+16.7%
Europe	€ 363.1 bn	+16.3%
North America	€ 333.5 bn	+ 6.0%
Latin America	€ 37.9 bn	+24.6%
MENA	€ 11.9 bn	+32.6%
Africa	€ 2.3 bn	+11.9%
Others	€ 18.7 bn	+10.8%

## Global

€1,173.5 bn **+13.6%**

Total B2C e-sales 2013 of goods and services



## Cross-border B2C E-commerce

Most popular countries:

USA	45%
UK	37%
China / HK	26%
Canada	18%
Australia	16%
Germany	14%



€ 76.7 bn

"94 million consumers buy cross-border and this number is expected to grow in 2014"

## Top 10 e-commerce countries in turnover (EUR billion)

USA	€ 315.4
China	€ 247.3*
UK	€ 107.1
Japan	€ 81.3
Germany	€ 63.4
France	€ 51.1
Australia	€ 26.9
Canada	€ 18.0
Russia	€ 15.5
S. Korea	€ 15.2

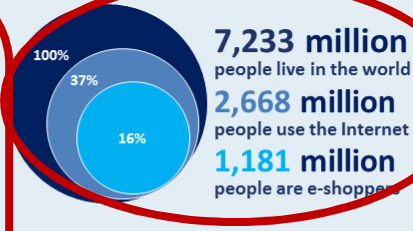


\* B2C & C2C goods & services, excluding insurances

## GOMSEC

Global Online Measurement Standard B2C E-Commerce

USA, China and UK account for 57% of total B2C e-commerce sales in the world



7,233 million people live in the world  
2,668 million people use the Internet  
1,181 million people are e-shoppers

€ 1,173.5 bn  
Turnover E-commerce Goods & Services

Estimated share of online goods in total retail of goods

4.2%



73.4%

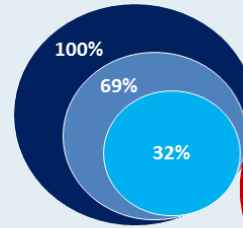
Share of Internet users accessing the web through a mobile device\*

\*Average worldwide

"1,878 million estimated social media users"



West € 177.7 bn +12.4%  
 Central € 93.3 bn +22.7%  
 South € 40.8 bn +18.9%  
 North € 31.9 bn +12.7%  
 East € 19.3 bn +47.3%

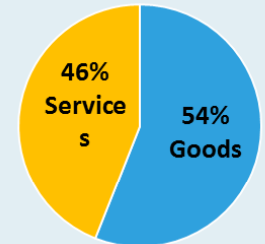


816 million people live in Europe  
 565 million people use the Internet  
 264 million people are e-shoppers

€ 363.1 bn  
 Turnover E-commerce  
 Goods & Services

Average spending per e-shopper € 1,376

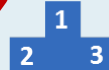
228 million e-households



Europe € 363.1 bn 16.3%  
 EU28 € 317.9 bn 14.7%



2.2% eGDP  
 € 16.4 trn GDP 2013



Top 5 mature e-commerce countries in turnover (million)

UK	€ 107,157
Germany	€ 63,400
France	€ 51,100
Austria	€ 10,970
Netherlands	€ 10,583

Top emerging countries

Russia	€ 15,500
Spain	€ 14,414
Italy	€ 11,268
Poland	€ 5,225

5.7%

Estimated share of online goods in total retail of goods

2,111,111+ jobs directly or indirectly via e-commerce

645,000+ estimated online businesses

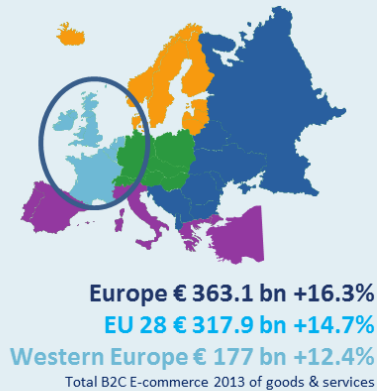
3.7 billion+ number of parcels annually (f)

UK, Germany, France account for 61% of total e-commerce sales in Europe

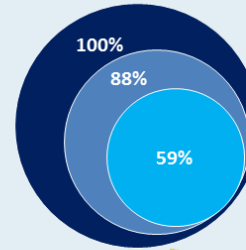




# Western Europe 2013 Key B2C E-commerce Data of Goods and Services at a Glance



Average spending per e-shopper



161 million people live in Western Europe  
142 million people use the Internet  
95 million people are e-shoppers

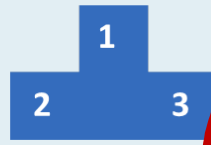
€ 177.7 bn  
Turnover E-commerce Goods & Services



63 million e-households



E-commerce GDP 3.45%  
Total GDP € 5,163 bn



Ranking Western Europe in turnover (EUR million)

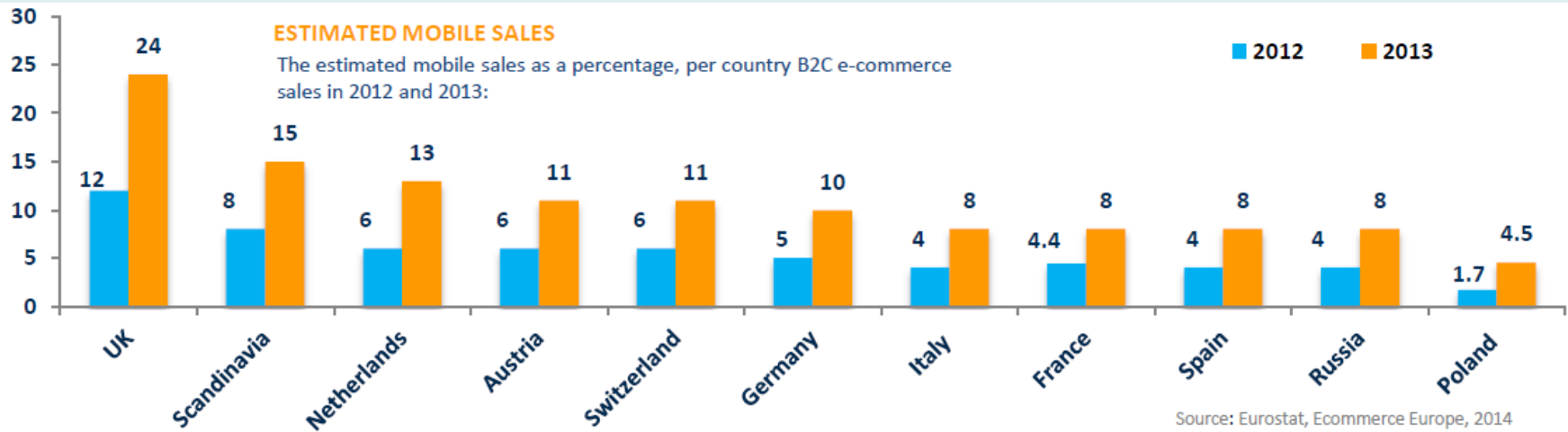
1		United Kingdom	€ 107,157
2		France	€ 51,100
3		The Netherlands	€ 10,583
4		Ireland	€ 4,600
5		Belgium	€ 3,820
6		Luxembourg	€ 460

9.5% Estimated share of online goods in total retail of goods

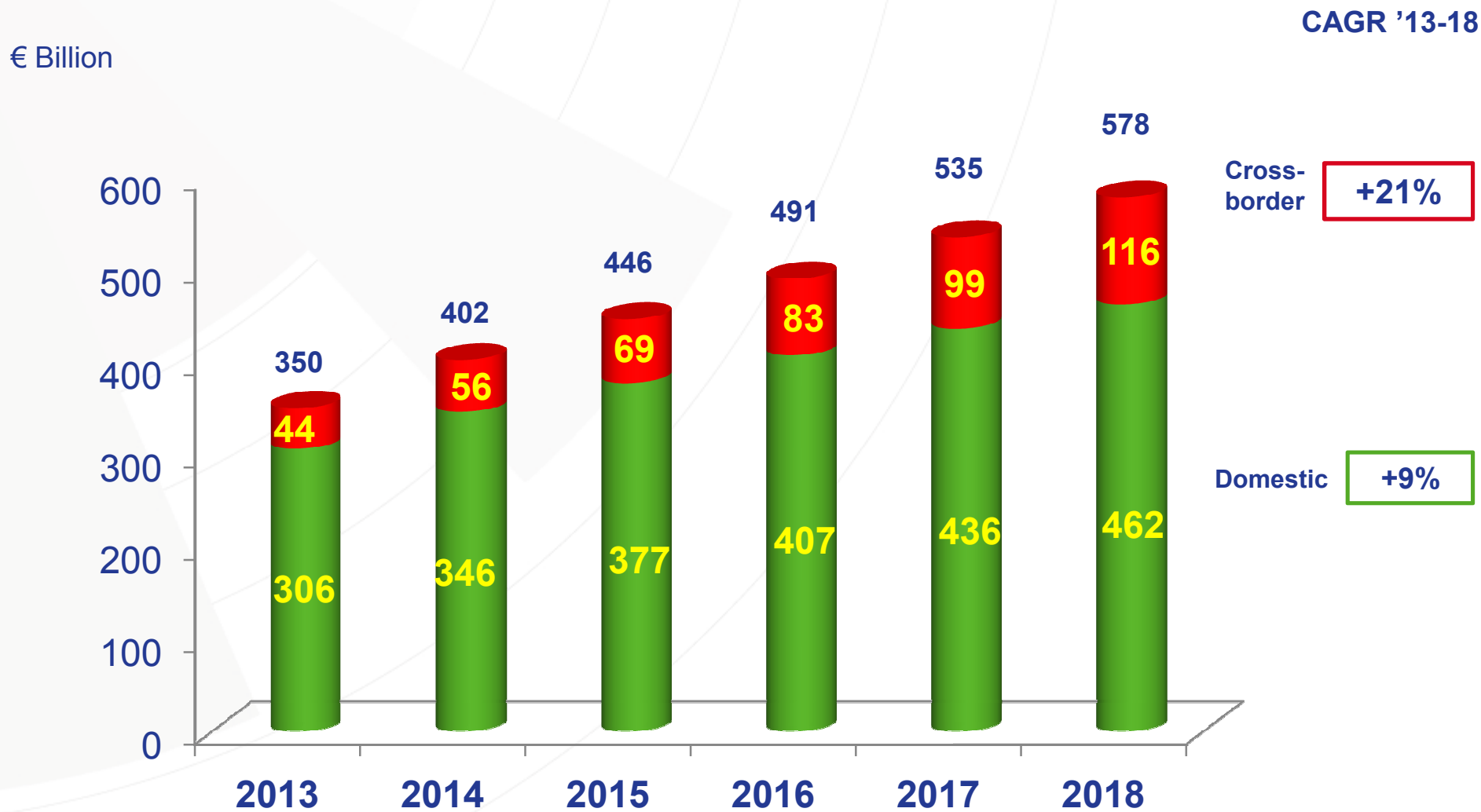


Estimated 72% of active Internet users are on social media

# Mobile Commerce

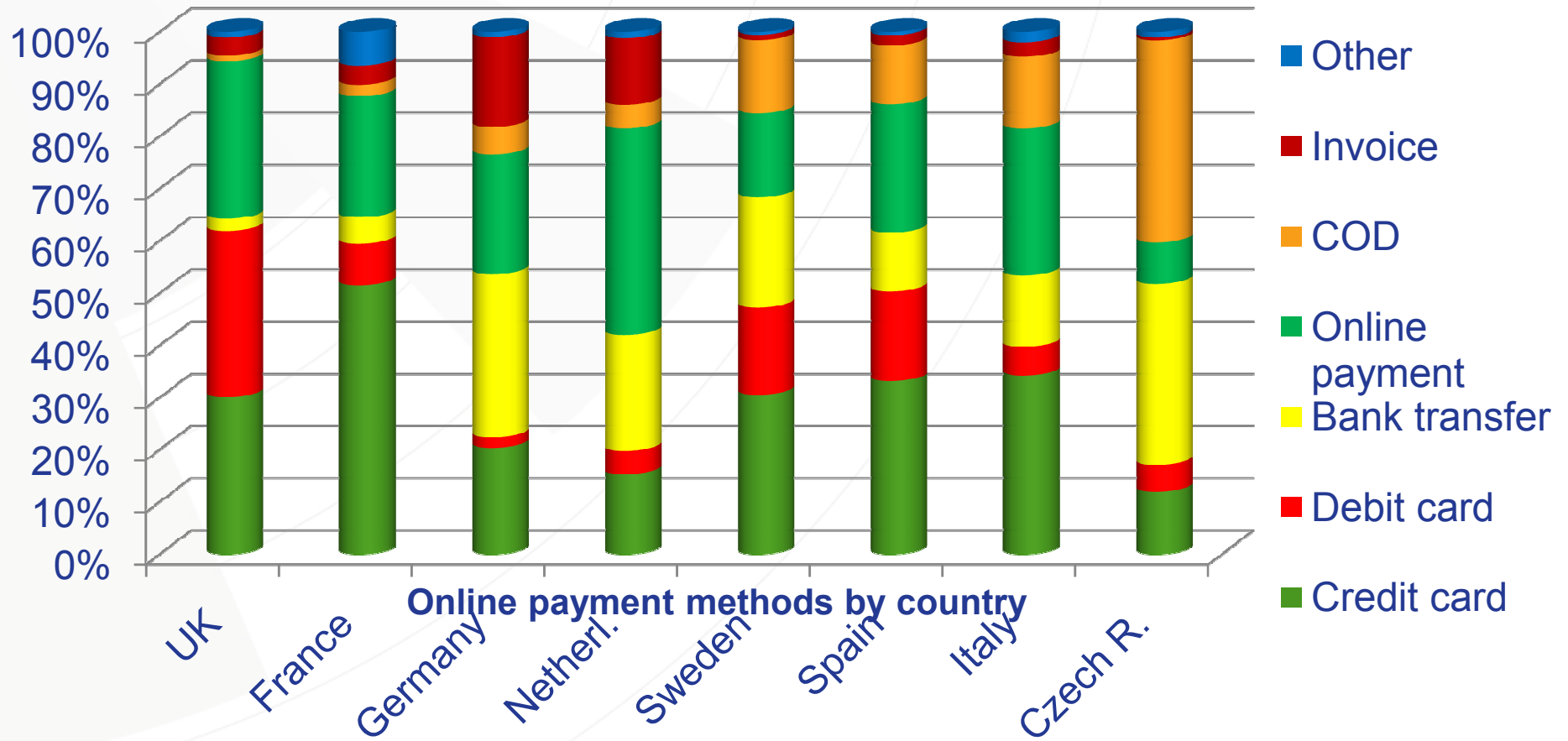


## Le vendite cross-border cresceranno del doppio rispetto al domestico



Source: EMOTA, 2013

# I metodo di pagamento devono essere adattati alle specificità dei diversi paesi



Source: Civic Consulting/TNS, 2011



# LA CONVERGENZA DI TUTTI CANALI



# Instant E Blended Commerce

ebay™ now


- 1 FIND WHAT YOU WANT, ORDER WHAT YOU WANT
- 2 OUR VALET WILL PICK UP THE ITEM AND DELIVER IT TO YOU
- 3 PAY WITH YOUR CREDIT CARD OR WITH YOUR PAYPAL ACCOUNT

PayPal VISA

ROGERS 2:38 PM

Results Overview Cart (0)

### Pioneer Picnic Basket



Fast and affordable delivery to your doorstep.

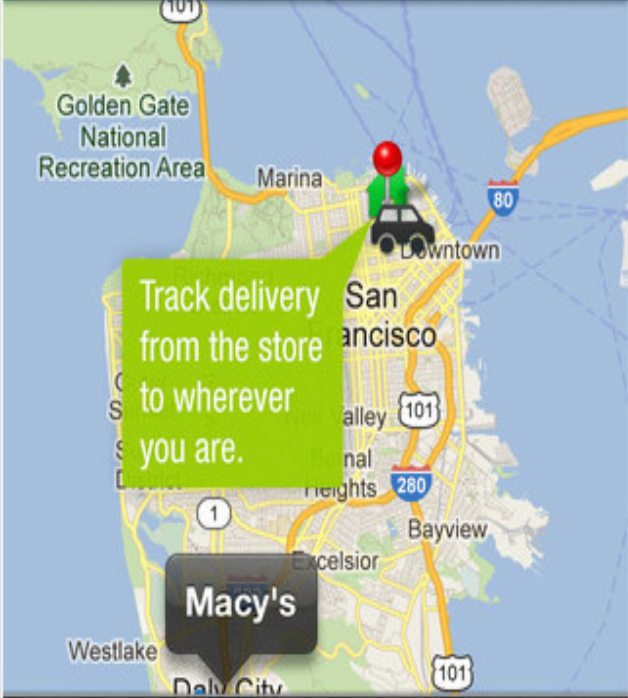
\$154.00 + \$5.00 delivery + tax at Macy's

**Add It!**

DESCRIPTION • REVIEWS • SPECS

ROGERS 8:46 PM


Deliver by 9:46 PM Change



Track delivery from the store to wherever you are.

Macy's

Your Order Has Arrived



**Call Megan**





## IL SUPER CONSUMER

*“There is only one boss. The customer. And he can fire everybody in the company from the chairman on down, simply by spending his money somewhere else...”*

# IL CONSUMATORE È DIVENTATO SUPER

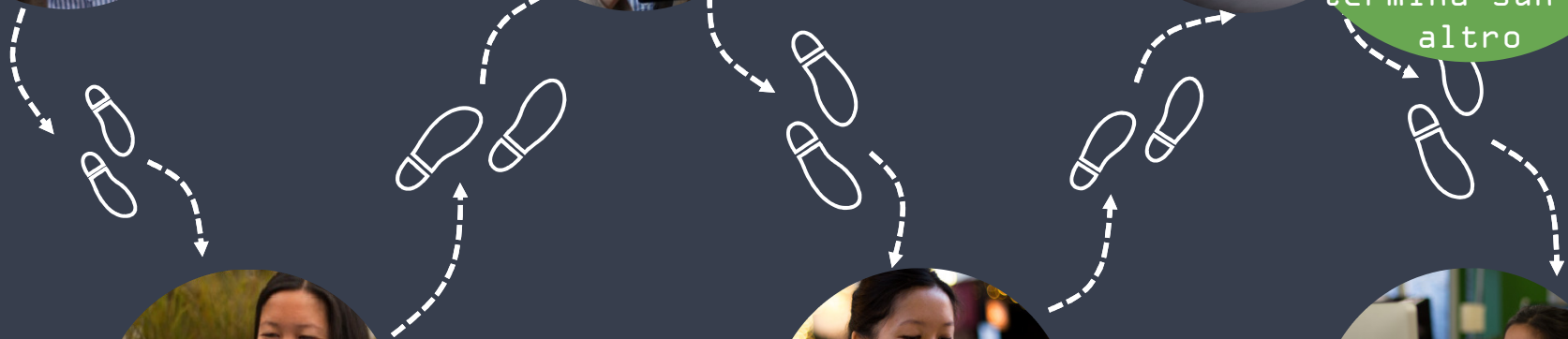




Il percorso di acquisto dell'utente è oggi sempre più complesso



67%  
Inizia lo shopping su un device e lo termina su un altro



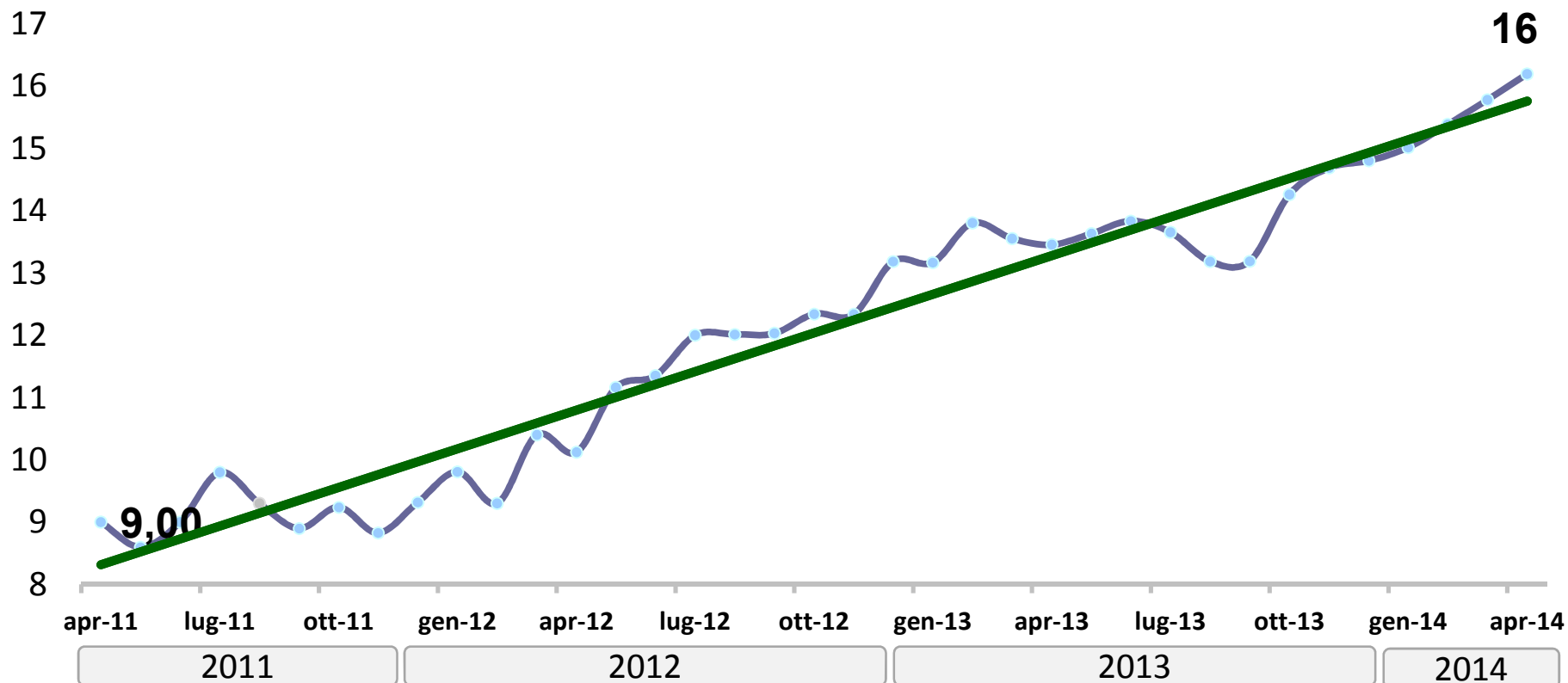
... e con gli strumenti adatti può essere influenzato nei momenti chiave

# I 5 Megatrend osservati

1. Convergenza dei canali
2. Il Superconsumatore
3. Internet delle cose
4. La Re-Economy e Sharing
5. La competizione è globale



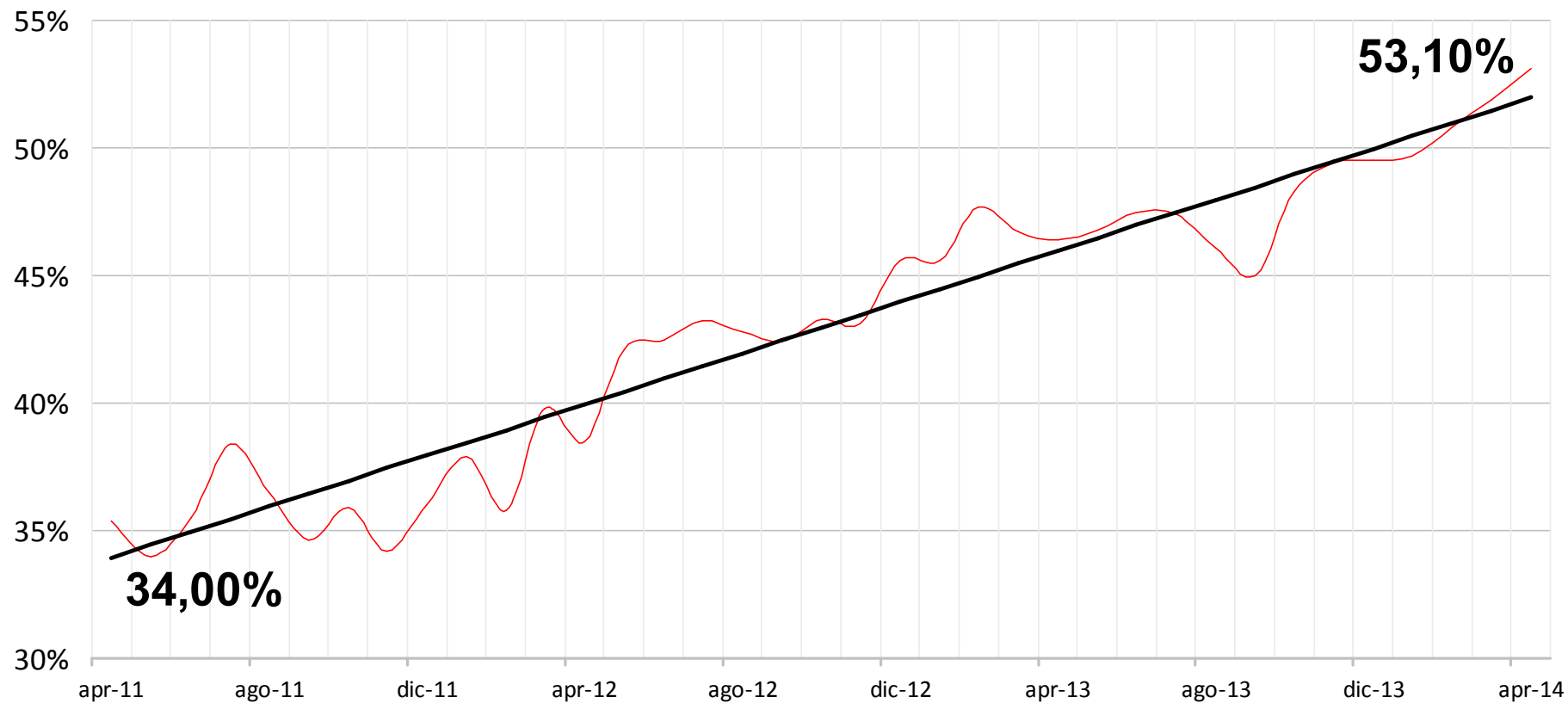
## TREND ACQUIRENTI ONLINE ACQUIRENTI ONLINE ATTIVI NEI TRE MESI PRECEDENTI IL MESE DI RILEVAZIONE (IN MILIONI)



Numero degli acquirenti online attivi negli ultimi tre mesi (in milioni), da Aprile 2011 a Aprile 2014. Si nota un chiaro trend crescente, al netto delle fluttuazioni statistiche del dato campionario e della componente stagionale.

# TREND ACQUIRENTI ONLINE

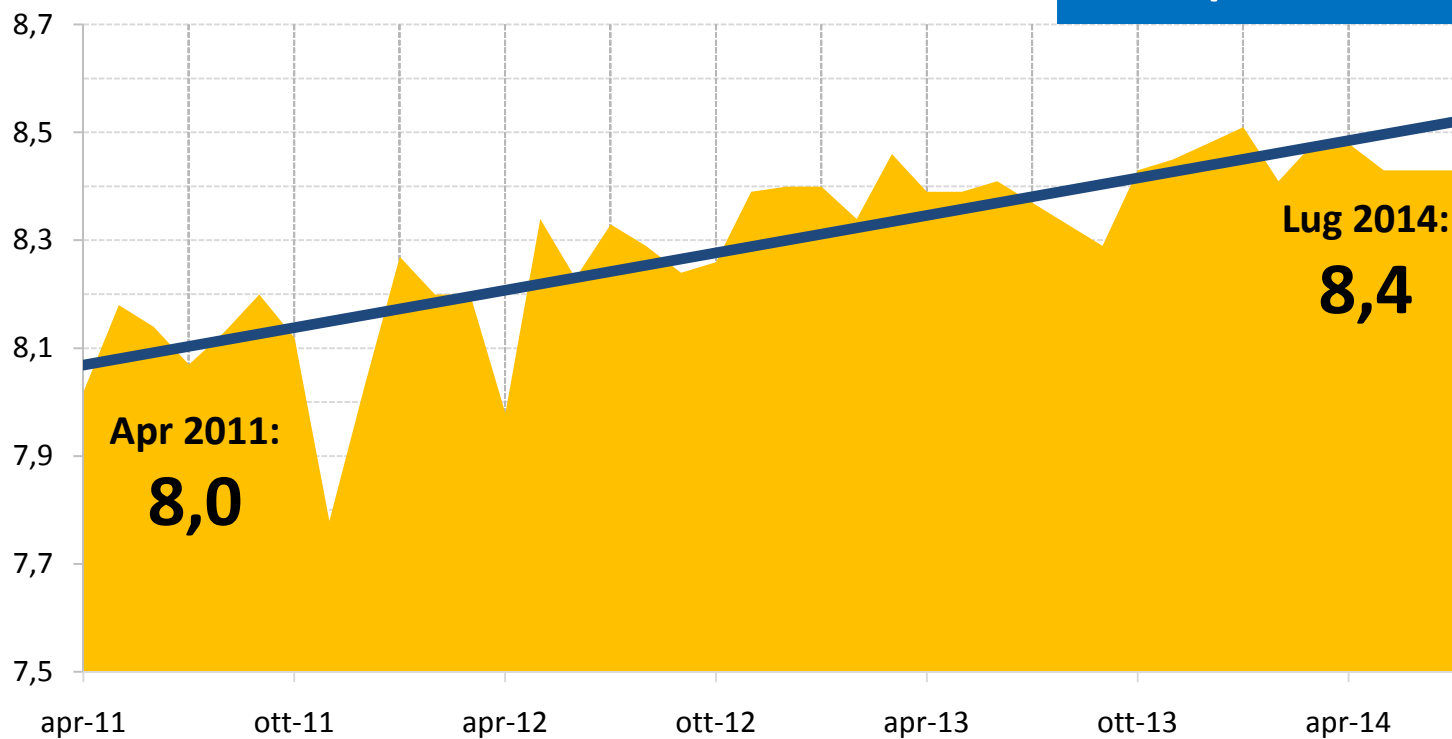
## ACQUIRENTI ONLINE ATTIVI NEGLI ULTIMI TRE MESI SUL TOTALE UTENTI INTERNET



# LA SODDISFAZIONE DELL'ACQUISTO ON LINE È IN COSTANTE CRESCITA

Net Promoter Score

93% dà un voto superiore a 7 all'acquisto online





# Net Retail - Alcuni indicatori del fenomeno in Italia

**16,2 milioni**  
Acquirenti online  
negli ultimi tre mesi  
(maggio 2014)

**55,9**  
Acquisti di beni fisici  
online ogni 100  
acquisti online  
(primo semestre 2014)

**52,8€**  
spesi per l'acquisto  
di prodotti fisici  
online ogni 100€ di  
acquisti online  
(primo semestre 2014)

**+26,4%**  
Crescita Y/Y degli  
acquirenti online  
abituali nell'ultimo  
anno  
(maggio 2014)

**10 milioni**  
Consegne mensili di  
prodotti acquistati  
online  
(primo semestre 2014)

**20,5%**  
quota di acquirenti  
online che negli  
ultimi sei mesi ha  
fatto acquisti da app  
su dispositivo mobile  
(febbraio 2014)

**15,1**  
acquisti originati da  
dispositivo mobile  
ogni 100 acquisti  
online  
(primo semestre 2014)

**38%**  
degli acquirenti di  
PC prima di  
acquistare in un  
negoziato fisico  
consultano un  
retailer online per  
individuare il  
prodotto migliore

**200€**  
spesi dalle donne  
per l'acquisto online  
di cosmetici ogni  
100€ spesi dagli  
uomini  
(maggio 2014)

**1.431 M€**  
valore mensile  
record degli acquisti  
online  
(aprile 2014)

**81%** dei  
pagamenti degli  
acquisti online su  
Carta (maggio 2014)

**103€**  
scontrino medio  
degli acquisti online  
(maggio 2014)

**10**  
pacchi ritirati in un  
luogo diverso dal  
domicilio ogni 100  
pacchi spediti per  
un acquisto online  
(primo semestre 2014)

**56,4%**  
(maggio 2014)

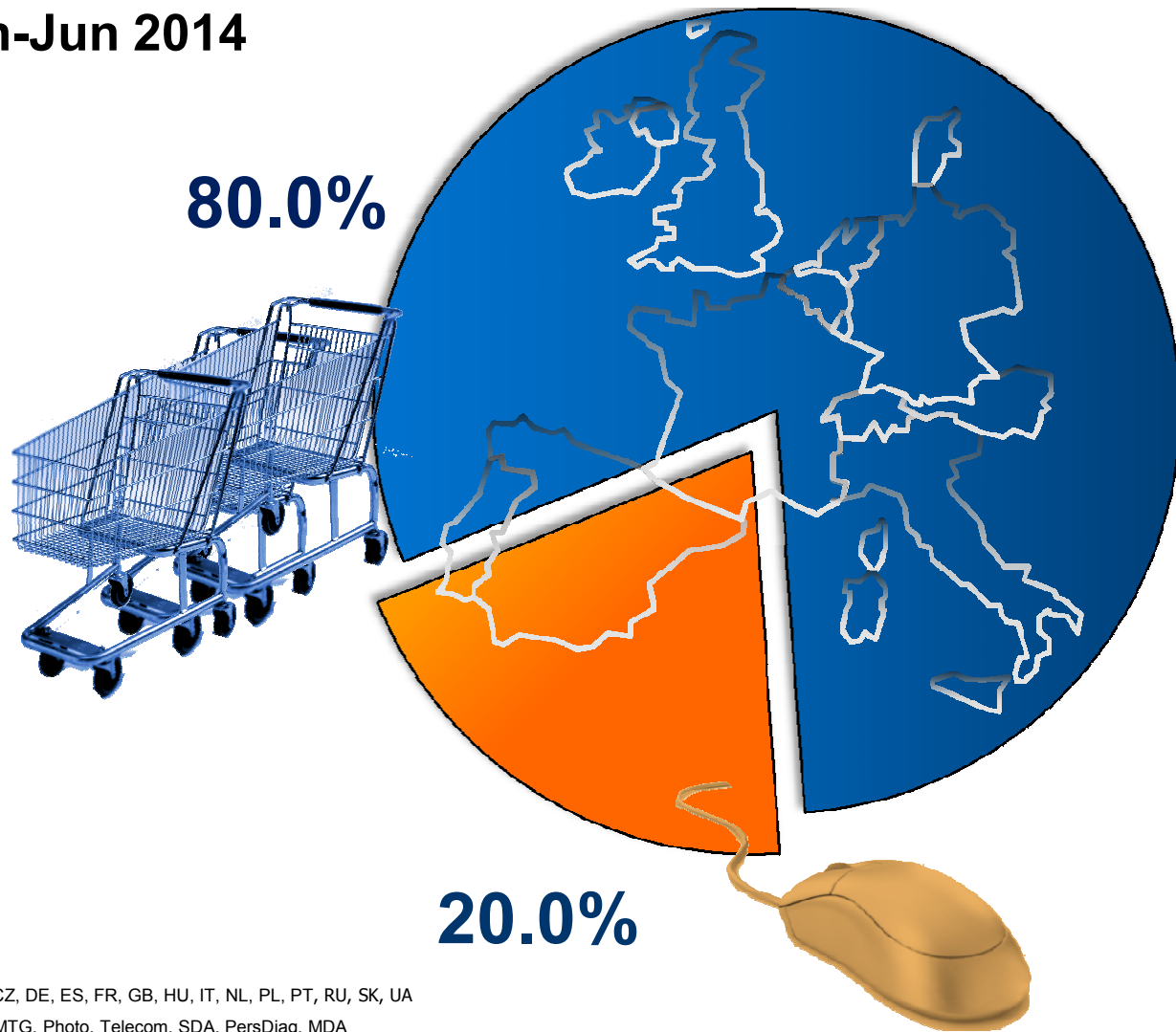
acquisti online presso un  
merchant sul quale si era  
già acquistato in passato

# Technical Consumer Goods\*\*

B2C Sales Value % - Consumer Channels 16 Countries Europe\*



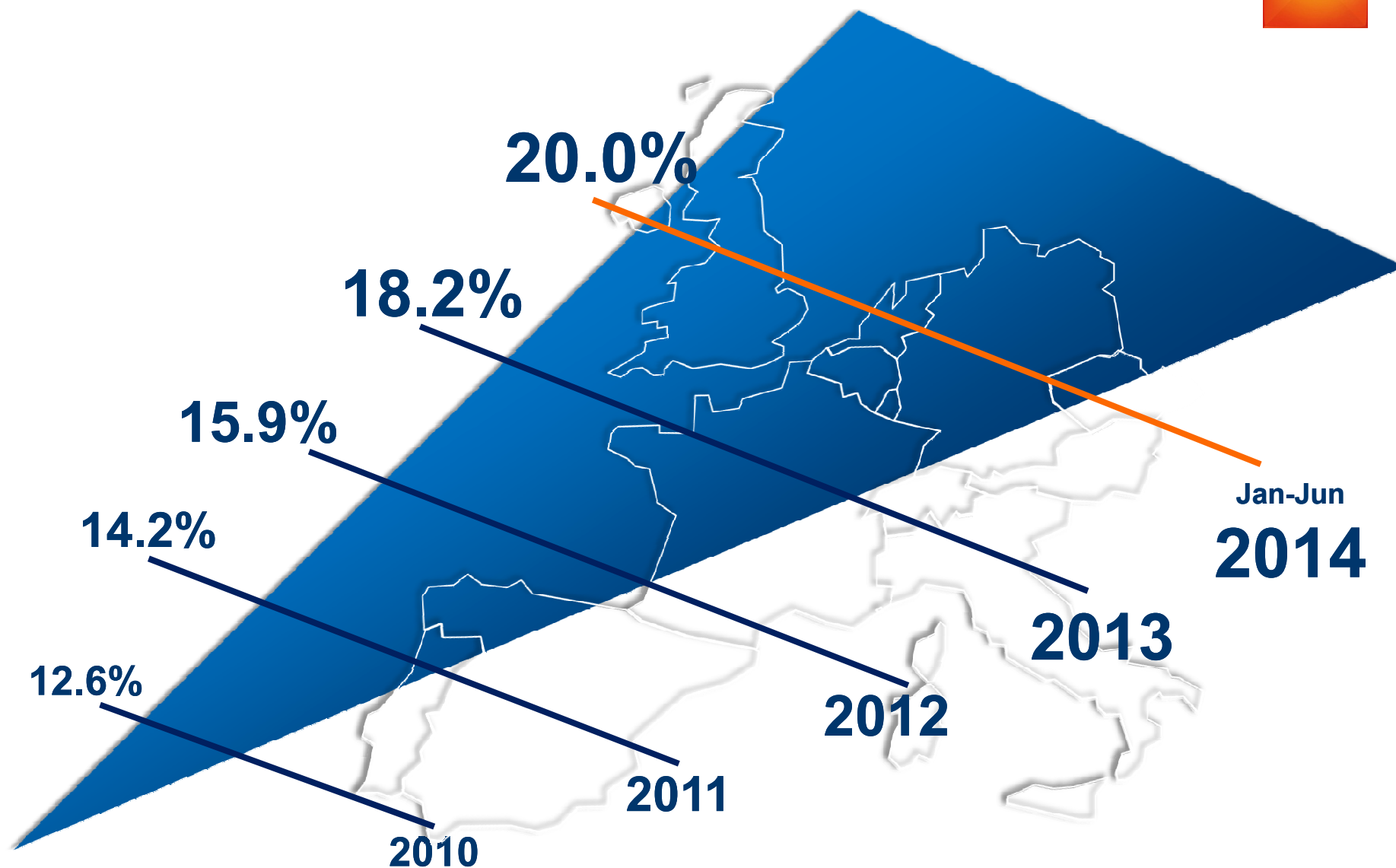
Jan-Jun 2014



\*) AT, BE, CH, CZ, DE, ES, FR, GB, HU, IT, NL, PL, PT, RU, SK, UA

\*\*\*) CE, IT, OE, MTG, Photo, Telecom, SDA, PersDiag, MDA

# Evolution of B2C Internet Sales-Share for TCG\*\* in Europe16\*

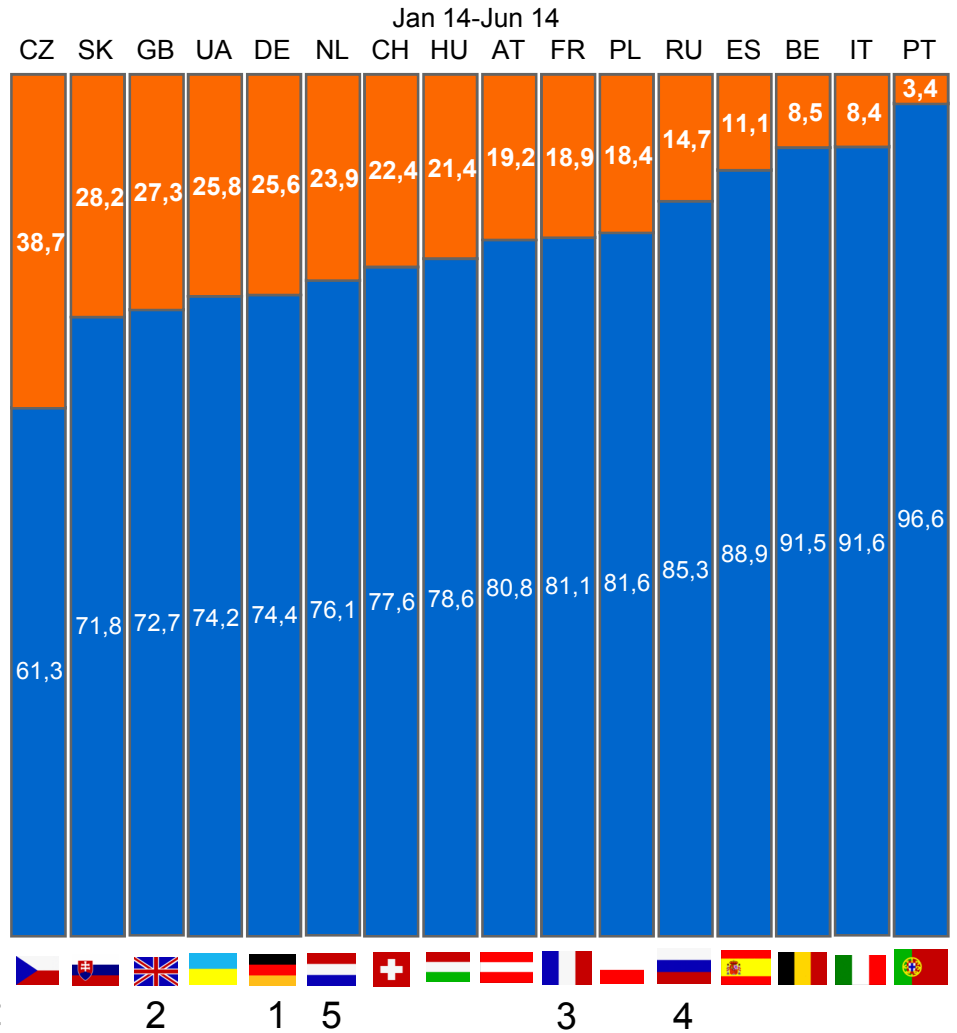
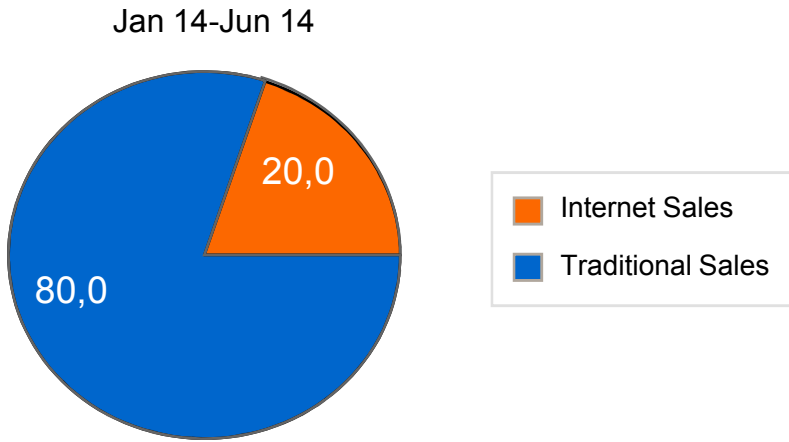


\*) AT, BE, CH, CZ, DE, ES, FR, GB, HU, IT, NL, PL, PT, RU, SK, UA

\*\*) CE, IT, OE, MTG, Photo, Telecom, SDA, PersDiag, MDA

# B2C Internet Sales-Share for TCG\*\* in Europe16\*

Value % per Country - Consumer Channels

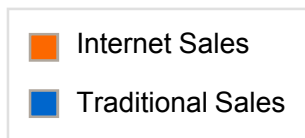
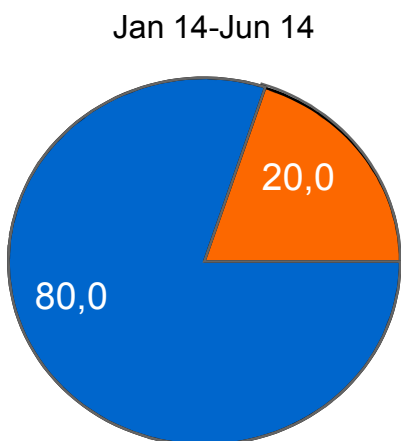


\*) AT, BE, CH, CZ, DE, ES, FR, GB, HU, IT, NL, PL, PT, RU, SK, UA  
 \*\*) CE, IT, OE, MTG, Photo, Telecom, SDA, PersDiag, MDA

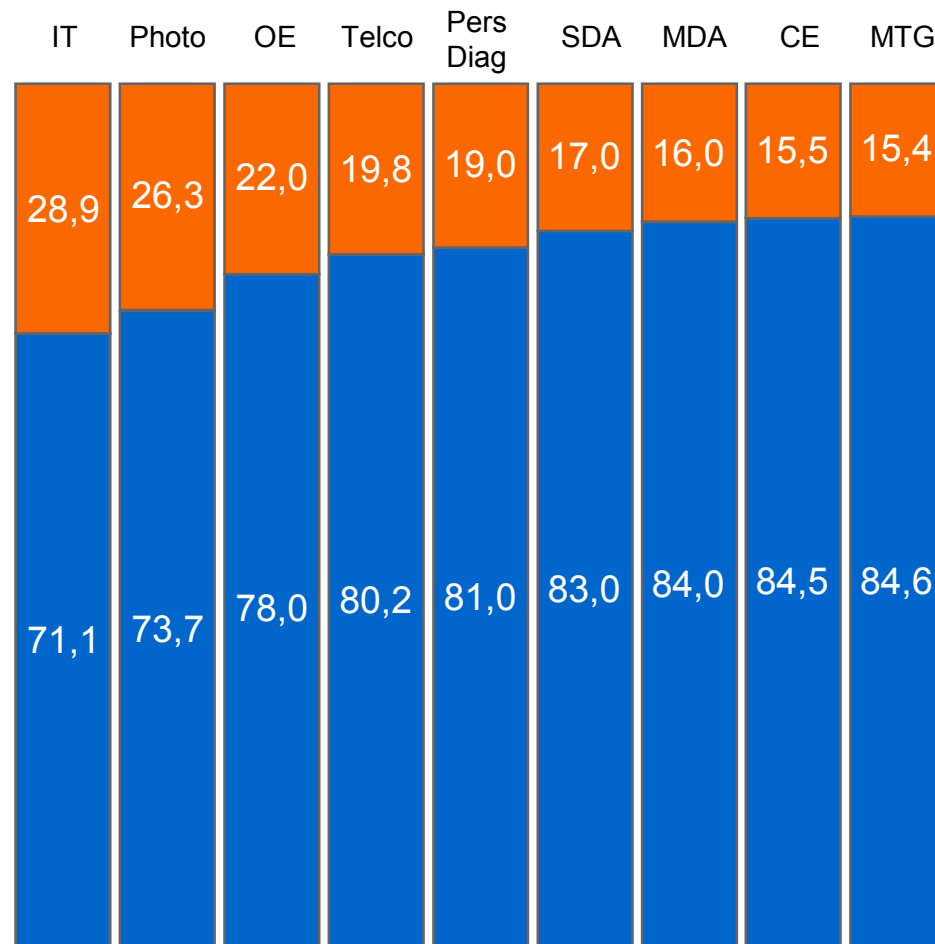
Total Sales Ranking Internet

# B2C Internet Sales-Share for TCG\*\* in Europe16\*

Value % per Country - Consumer Channels



IT: Information Technology  
 Photo: Photo  
 OE: Office Equipment  
 Telco: Telecommunication  
 Pers. Diag.: Personal Diagnostic  
 SDA: Small Domestic Appliances  
 MDA: Major Domestic Appliances  
 MTG: Multifunction Technical Goods

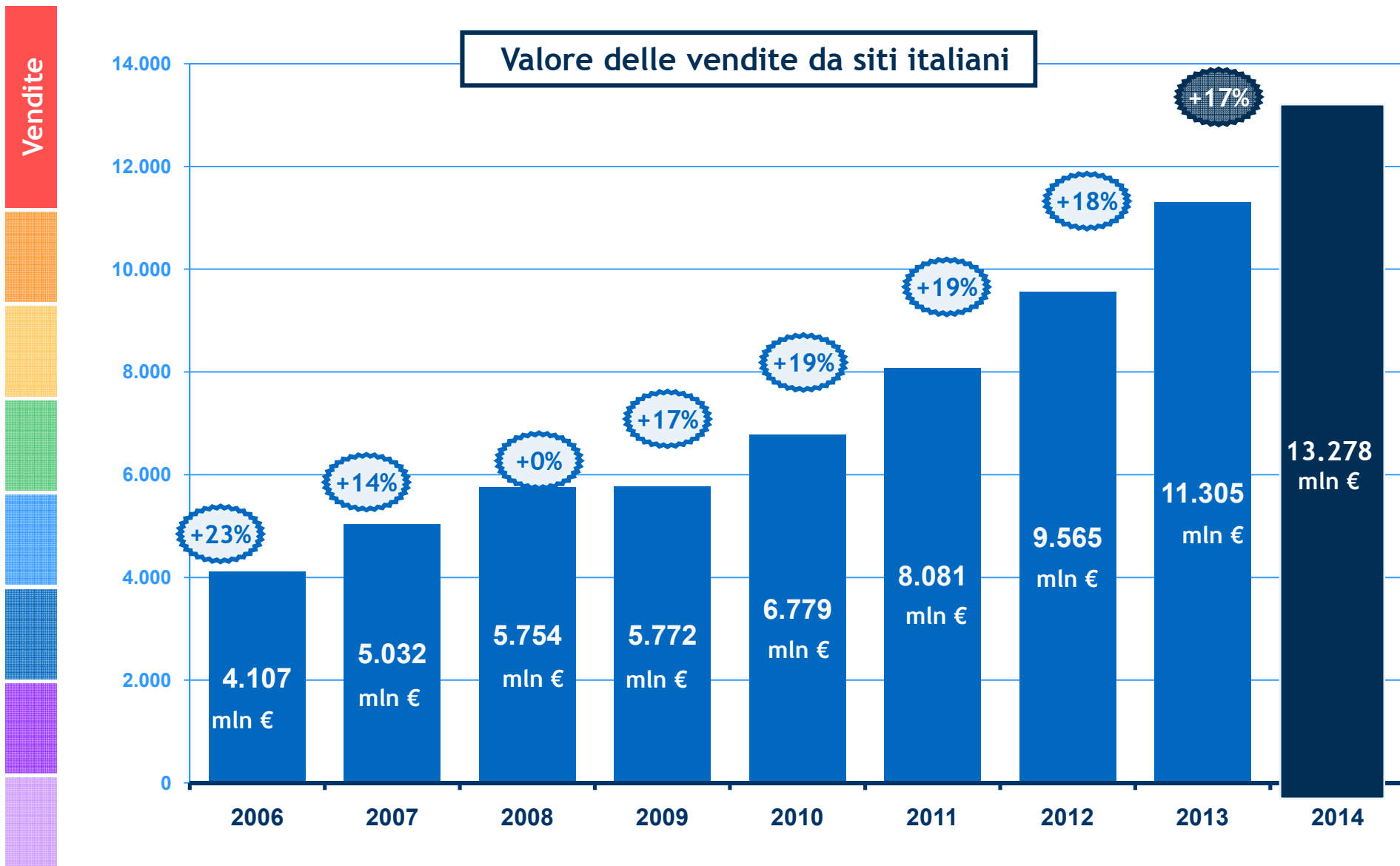


\*) AT, BE, CH, CZ, DE, ES, FR, GB, HU, IT, NL, PL, PT, RU, SK, UA

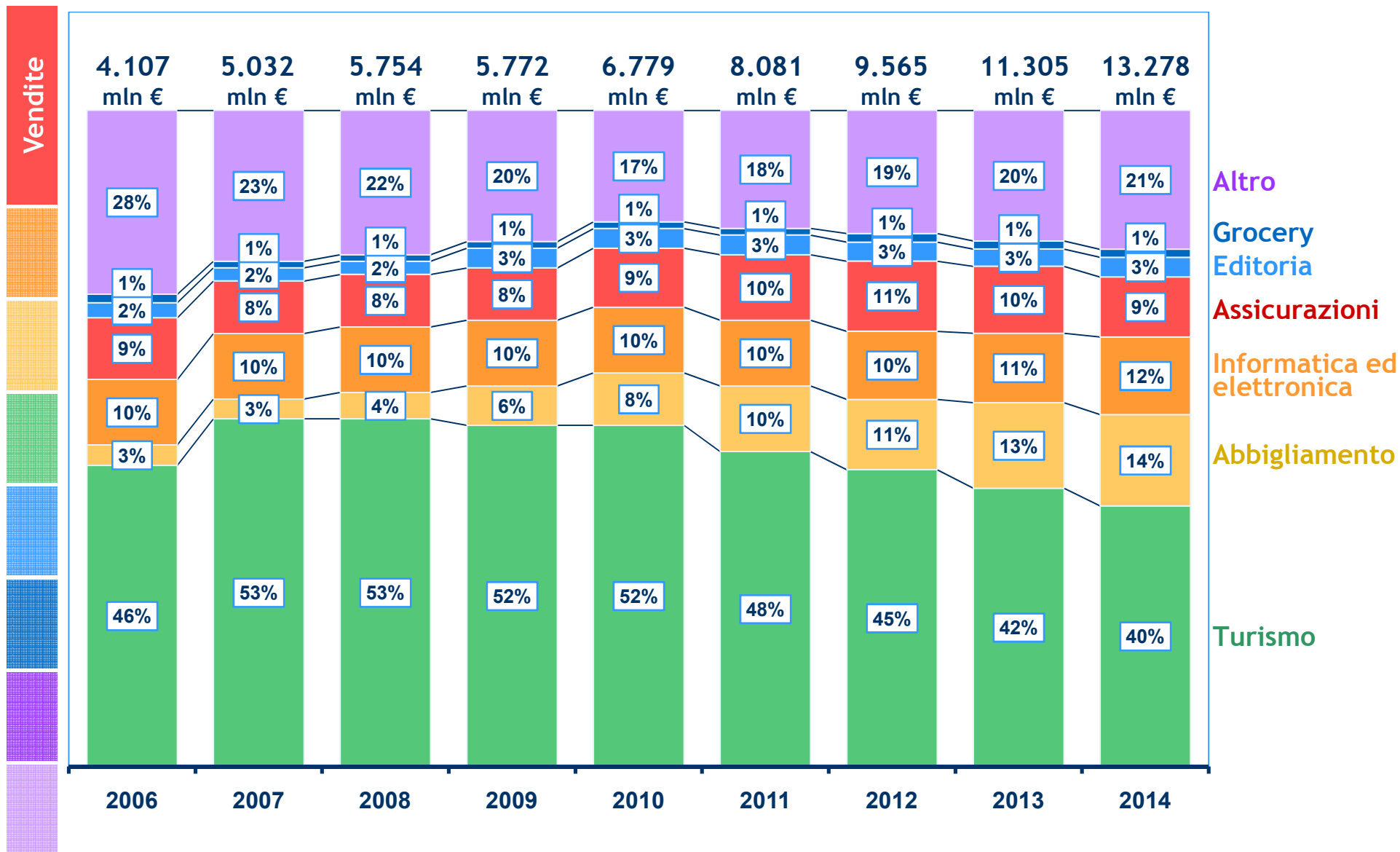
\*\*\*) CE, IT, OE, MTG, Photo, Telecom, SDA, PersDiag, MDA



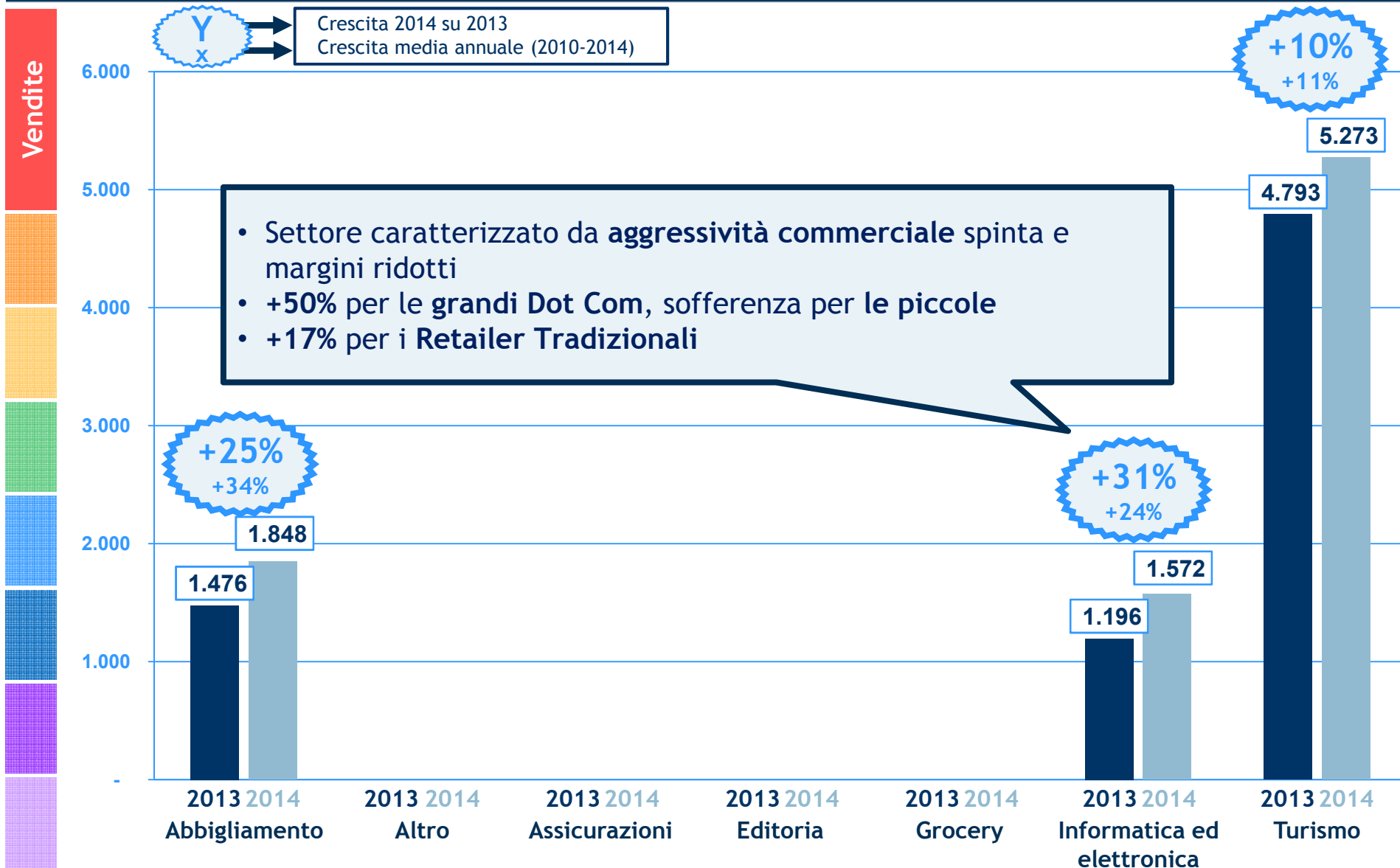
# La dinamica delle vendite eCommerce B2c in Italia (2006-2014)



# La distribuzione delle vendite per comparto merceologico (2006-2014)



# La dinamica delle vendite e i tassi di crescita per comparto merceologico (2013-2014)



# I tassi di penetrazione dell'eCommerce sul totale delle vendite retail (2014)

