



Ecommerce - La nuova via dell'export del Made in Italy

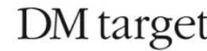
Roberto Liscia

*Presidente Consorzio Netcomm
Milano Asolombarda 3 luglio 2013*



Più valore al tuo stile!





Sigillo Netcomm

Il Consorzio Netcomm promuove lo sviluppo dell'e-commerce italiano.
Attraverso il Sigillo Netcomm aiuta i consumatori a comprare online

Il Sigillo si articola su due livelli:
Sigillo Netcomm



Sigillo Netcomm Gold



Le società socie, dopo valutazione positiva da parte di Netcomm possono esporre il Sigillo e si impegnano ad offrire un servizio facile, conveniente e sicuro

Ecommerce Europe

Ecommerce Europe è l'associazione che rappresenta le società che vendono prodotti o servizi on-line in Europa



E' stata fondata dalle associazioni nazionali europee di e-commerce, la sua missione è quella di promuovere gli interessi e lo sviluppo dell'e-commerce in Europa attraverso sostegno, comunicazione e networking

Paesi aderenti:

Belgio



Danimarca



Finlandia



Francia



Irlanda



Italia



Norvegia



Paesi Bassi



Spagna

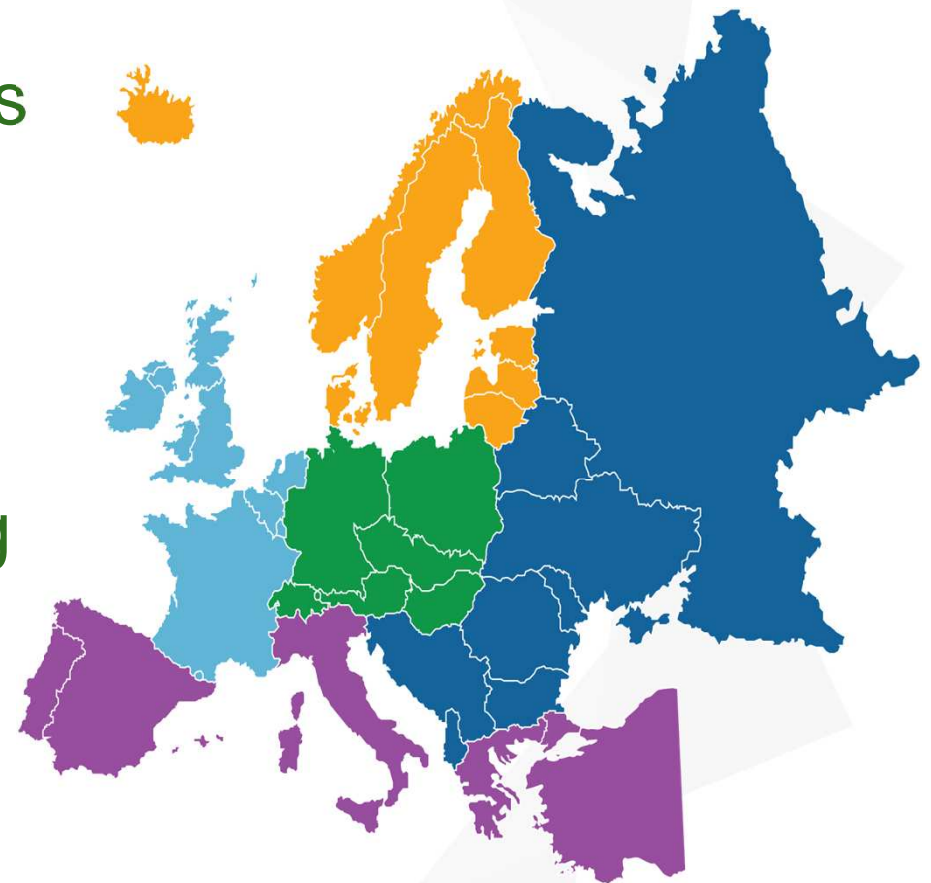


Polonia



Europe is fragmented

- 28 countries, 28 nationalities
- 24 languages
- 28 national legislations
- 28 different VAT systems
- Different rules on packaging
- Different implementation on regulations, f.e. cookies

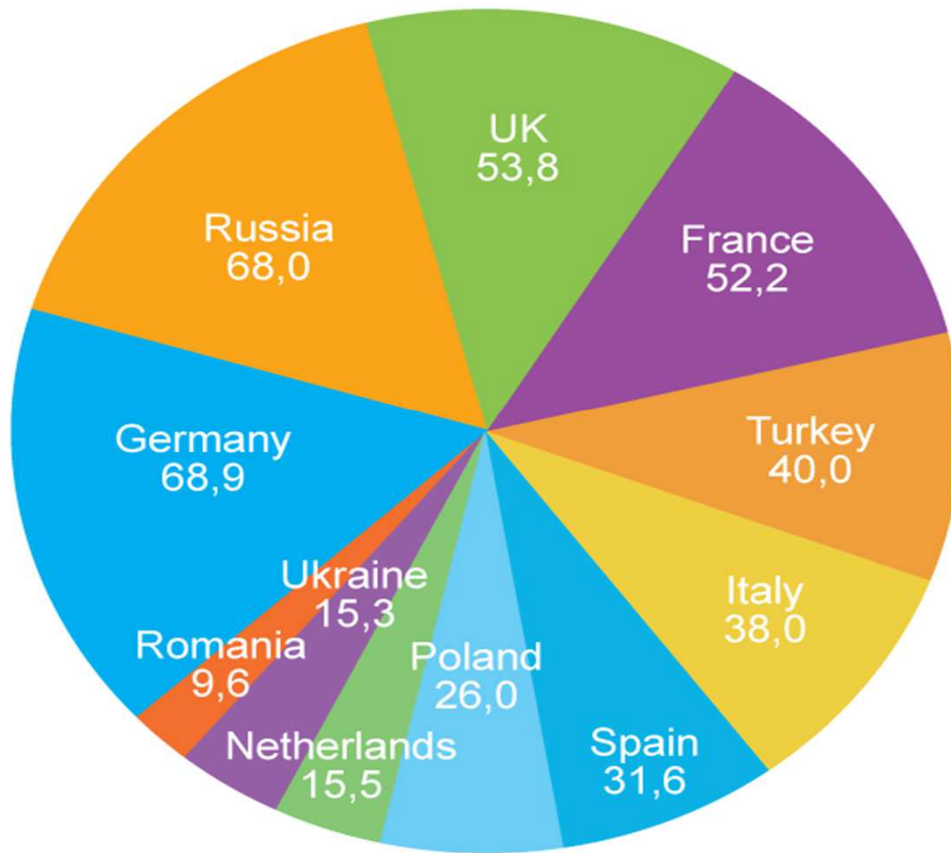


Barriers Perceived

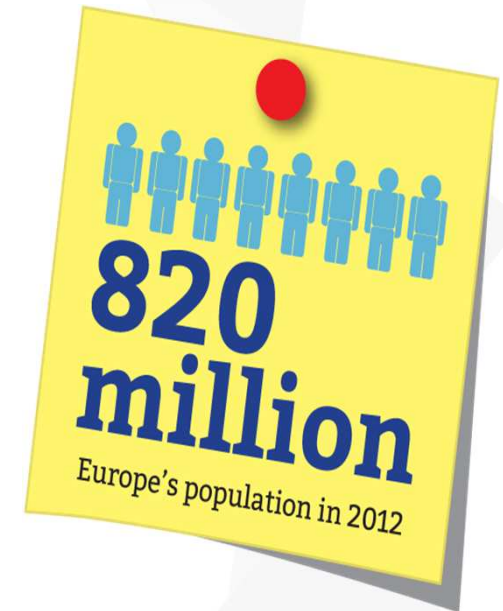
- Lack of trust
- Privacy and legislative protection concerns
- Lack of competitive online and mobile payments methods
- Payment security
- Perception of fraud, cybercrime issues
- Delivery options and insecurity
- Relatively high costs of access and usage

Europe facts & figures

INTERNET USERS IN EUROPE IN MILLIONS OF PEOPLE




Internet users in Europe,
Ecommerce Europe, 2013



Europe facts & figures

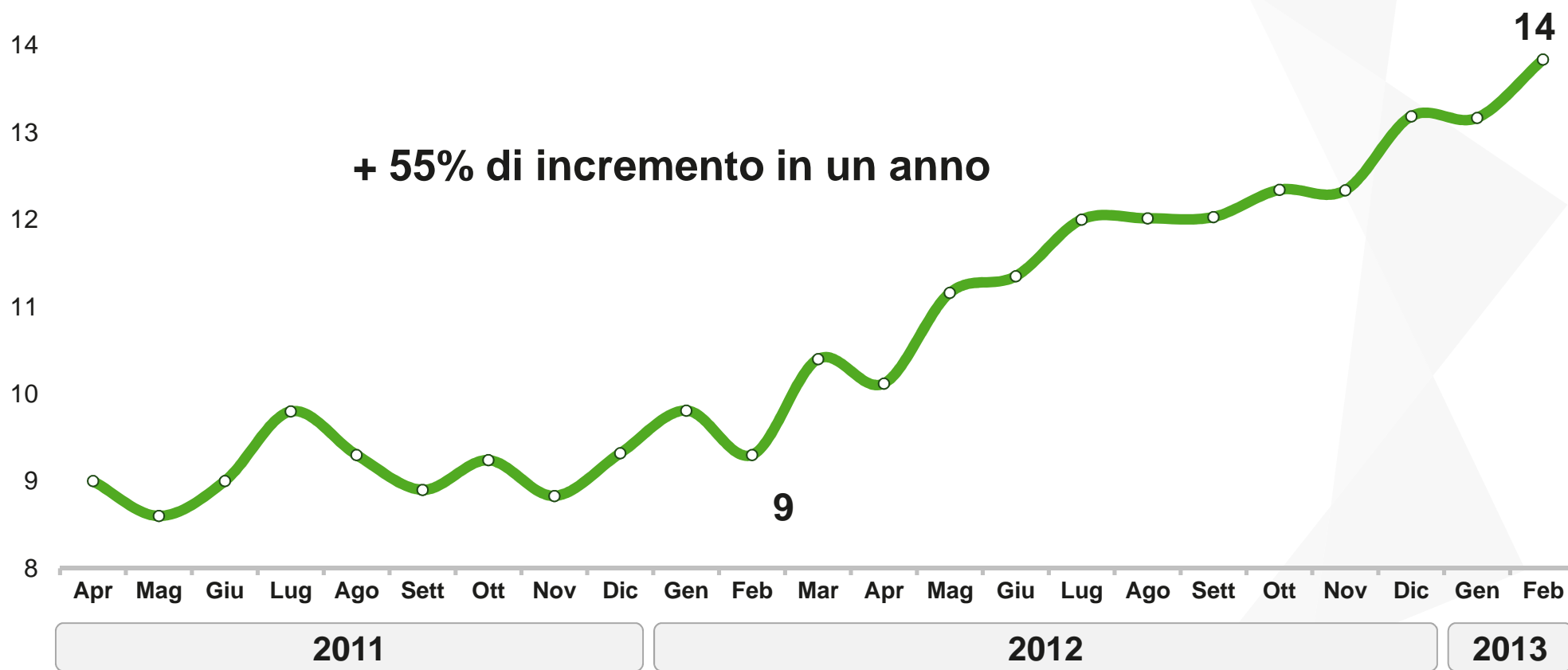
Top 10 European countries in terms of Internet access as a percentage of the population¹² in 2012:

1. Iceland (95%)
2. Netherlands (94%)
3. Norway (93%)
4. Luxembourg (93%)
5. Denmark (92%)
6. Sweden (92%)
7. Germany (85%)
8. UK (83%)
9. Ireland 81%)
10. Austria (79%)

 **64%**
of all Europeans
or 529 million
Europeans users
of Internet in 2012

74.3%
of the population
in EU28 used
Internet in 2012

Trend acquirenti online.



Acquisti da Dispositivo Mobile – Incremento Y/Y.

Aumento dell'incidenza degli acquisti da mobile sul totale degli acquisti online.

- Da uno smartphone/iPhone
- Da un Tablet PC

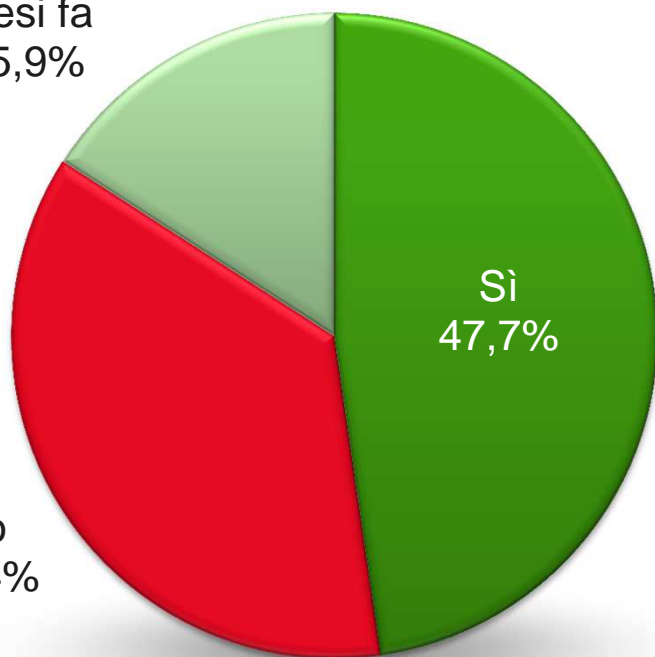


L'aumento di transazioni eCommerce prodotte su dispositivo mobile è impressionante:
in soli 12 mesi l'incidenza degli acquisti da Smartphone e TabletPC è più che raddoppiata, passando dal 4% del 2012 a oltre il 10% del 2013.

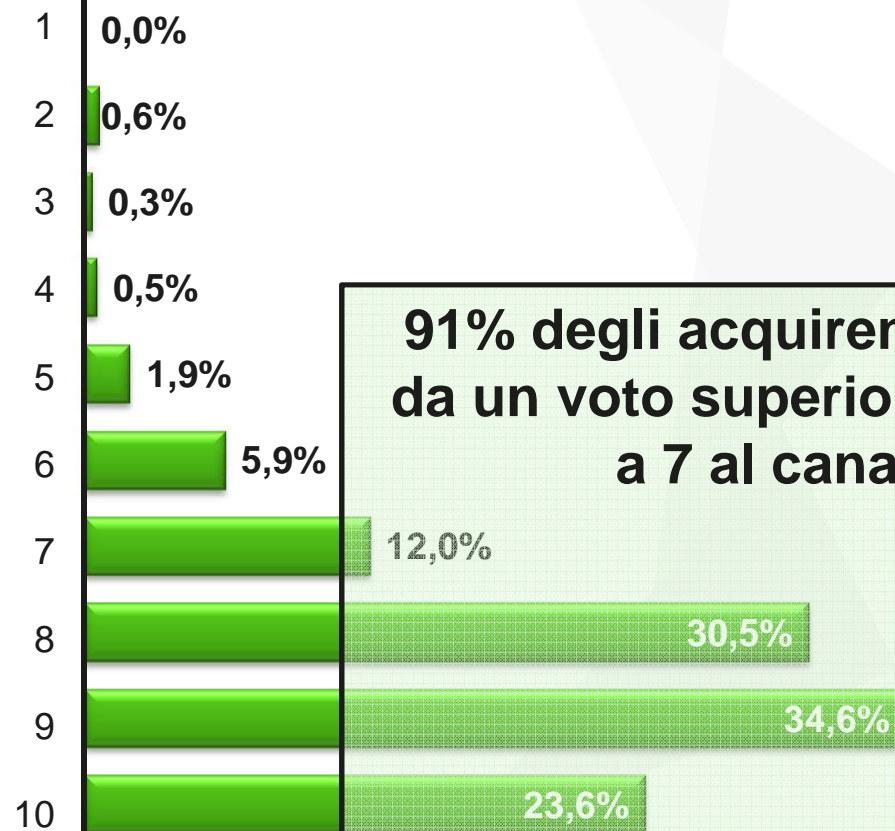
Gradimento dell'esperienza di acquisto.

Distribuzione dello score di soddisfazione – Febbraio 2013.

Sì, ma più di 3
mesi fa
15,9%

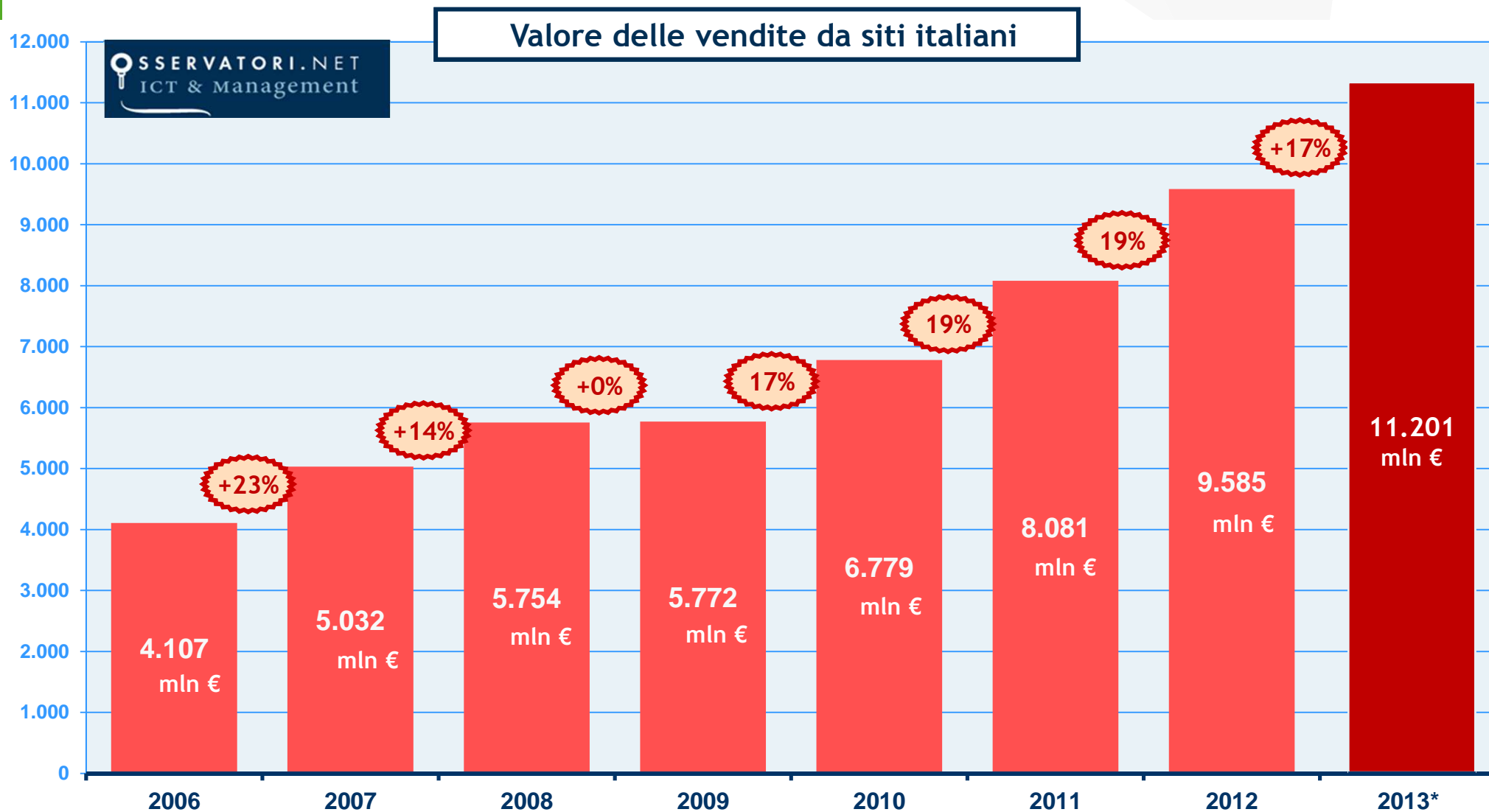


No
36,4%



**91% degli acquirenti
da un voto superiore
a 7 al canale**

La dinamica delle vendite eCommerce B2c in Italia

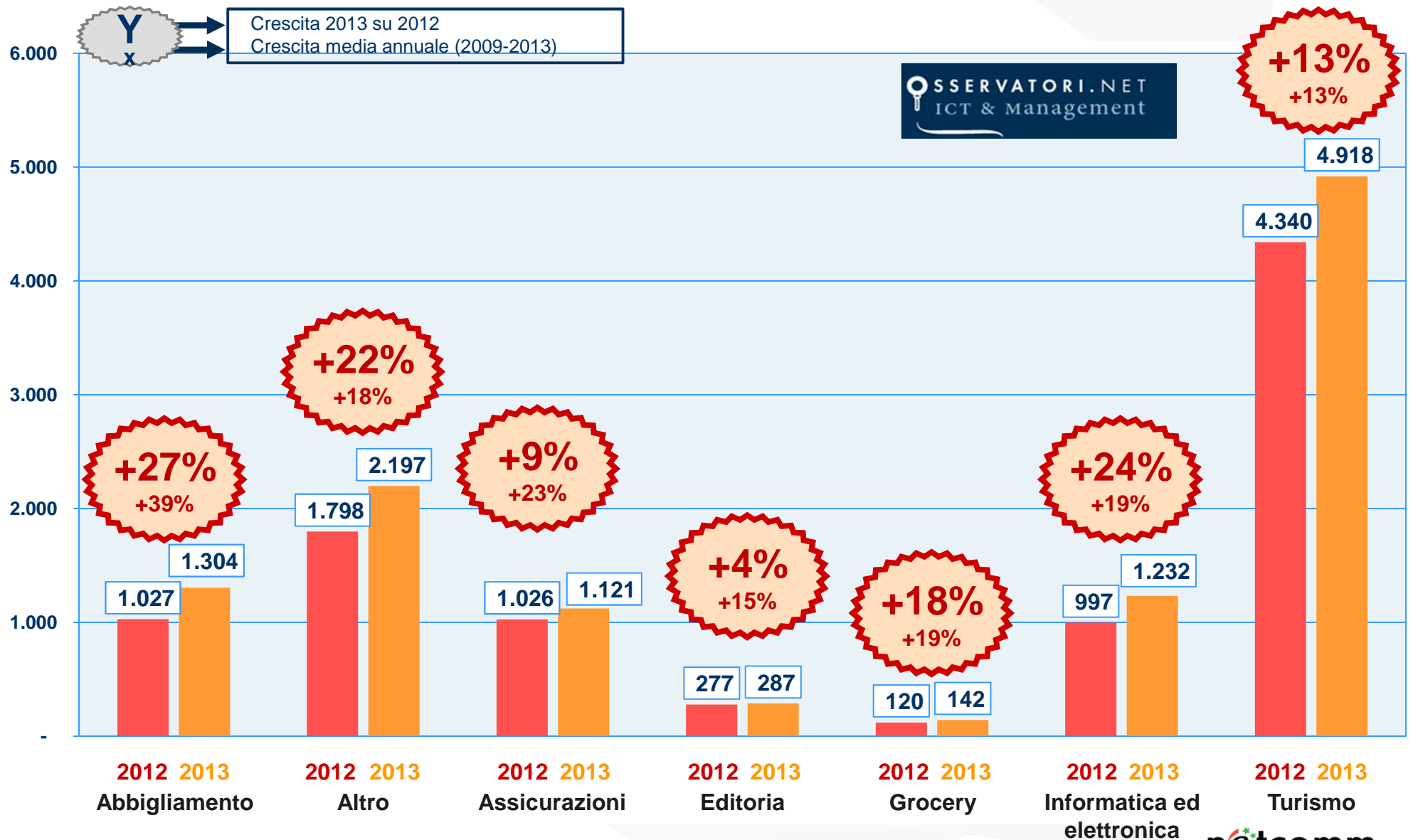


SSERVATORI.NET
ICT & Management

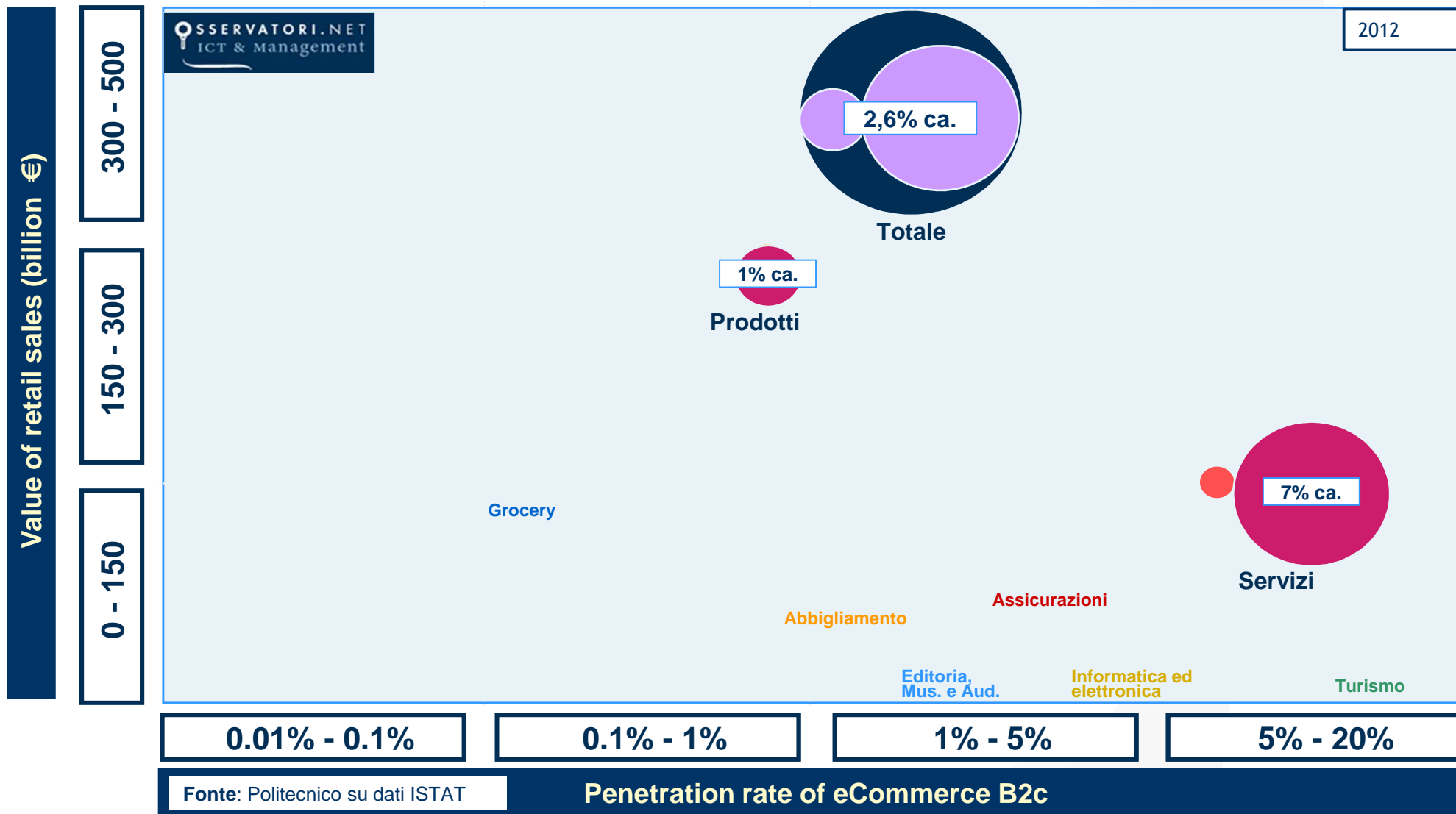
* Previsione ad Aprile 2013

netcomm
IL CONSORZIO DEL COMMERCIO ELETTRONICO ITALIANO

La dinamica delle vendite e i tassi di crescita per comparto merceologico

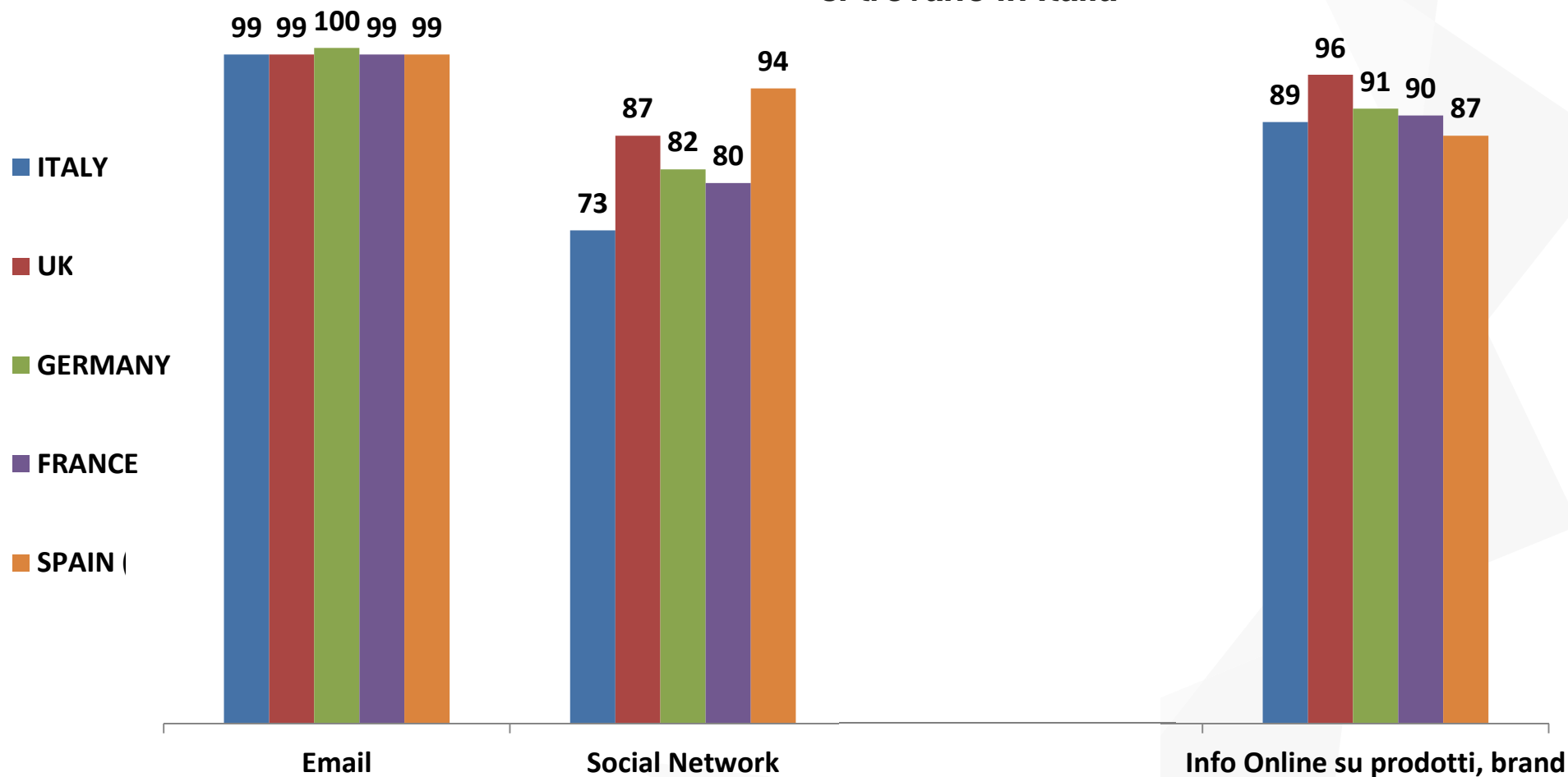


ECommerce penetration rates on total retail sales (2012)

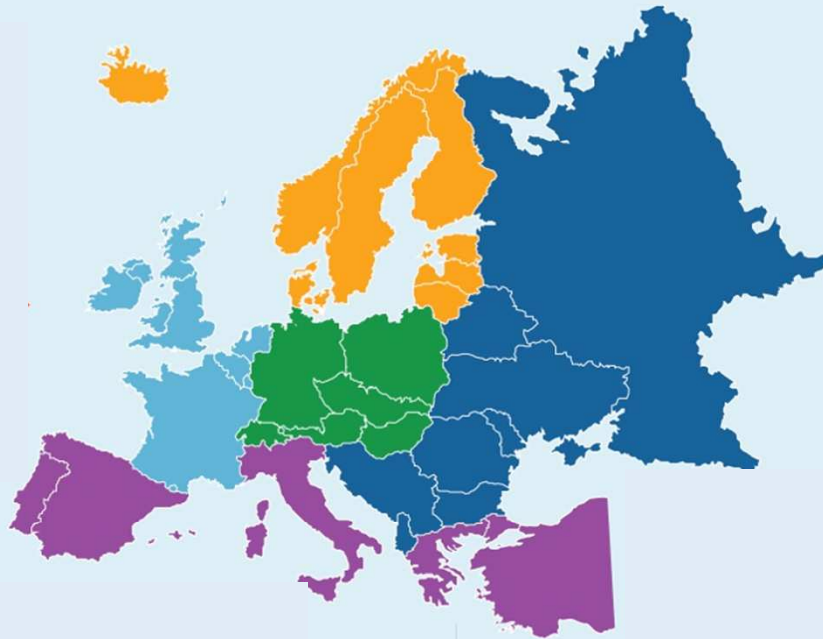


L'Ecommerce e le altre principali occasioni d'uso di internet

*Oggi le maggiori
possibilità di crescita
si trovano in Italia*



EUROPE 2012 Key data at a glance



Europe facts & figures



19.0%

Europe's B2C
e-commerce
growth in
2012

TOP 10 E-COMMERCE COUNTRIES IN TURNOVER IN MILLION EUROS in 2012

	Country	e-Sales 2012
1	UK	96,193
2	Germany	50,000
3	France	45,000
4	Spain	12,969
5	Russia	10,302
6	Netherlands	9,800
7	Austria	9,800
8	Italy	9,582
9	Switzerland	9,100
10	Norway	7,900

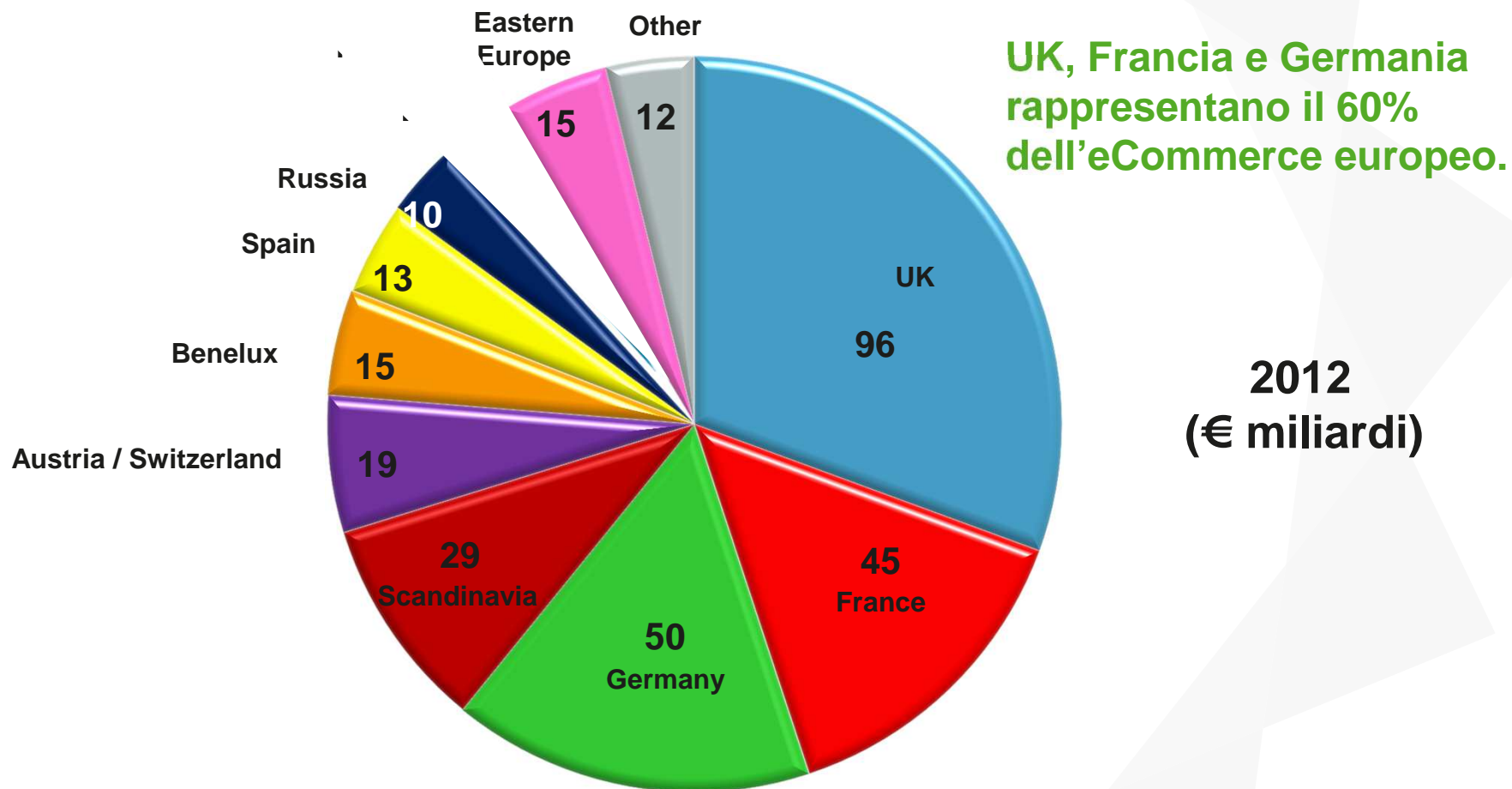
TOP 10 EMERGING COUNTRIES IN PERCENTAGE GROWTH IN 2012

	Country	e-Sales 2012
1	Turkey	75%
2	Greece	61%
3	Ukraine	41%
4	Hungary	35%
5	Romania	33%
6	Estonia	33%
7	Russia	33%
8	Malta	33%
9	Poland	25%
10	Bulgaria	25%



Source: Ecommerce Europe, 2013: e-sales of goods and services

L'eCommerce in Europa ha raggiunto nel 2012 i 314 miliardi di €, con 20% di crescita.

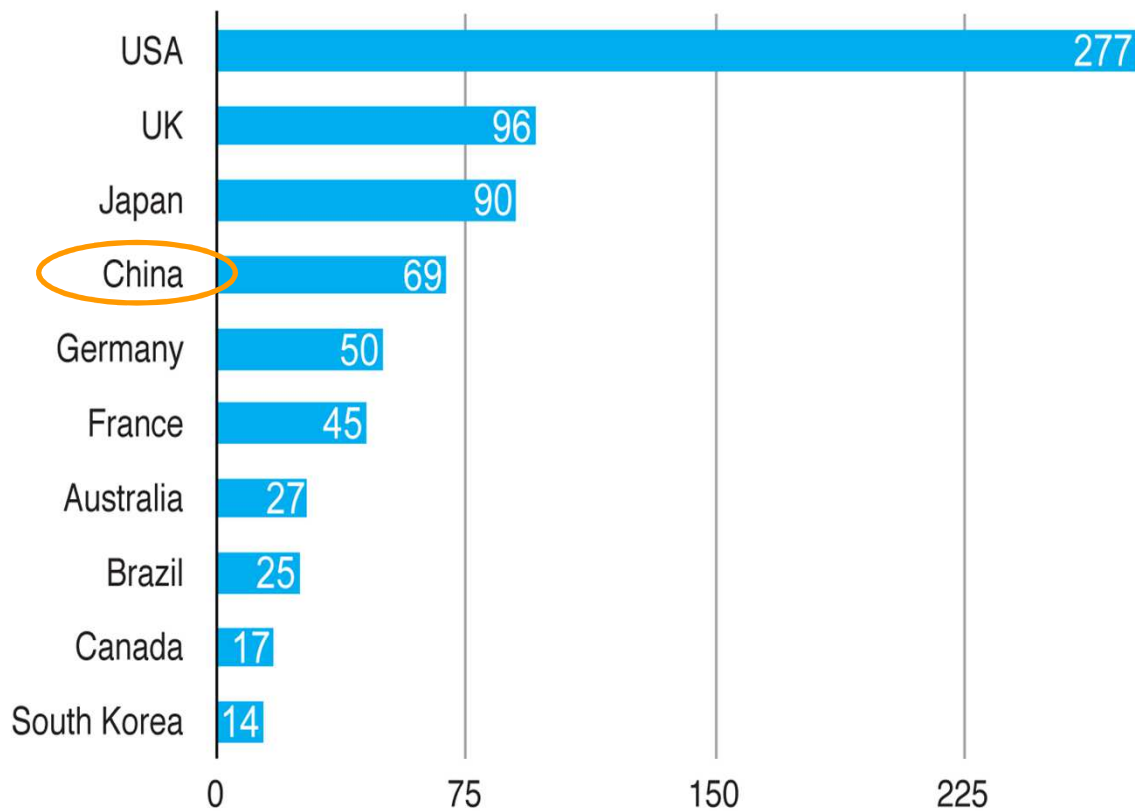


Elaborazione Netcomm su dati Emota e Ecommerce Europe

Note: B2C E-commerce turnover includes online travel, digital downloads and event tickets; excludes online gaming and financial services

World facts & figures

LEADING E-COMMERCE COUNTRIES AROUND THE WORLD

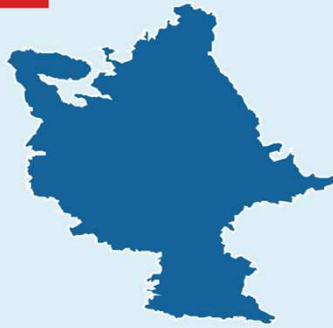


: Top 10 e-commerce countries around the world, in billion of euros ,Ecommerce Europe, 2013

1 billion
Global number of e-shoppers in 2012

889 billion
Total global B2C e-commerce sales in 2012

Russia

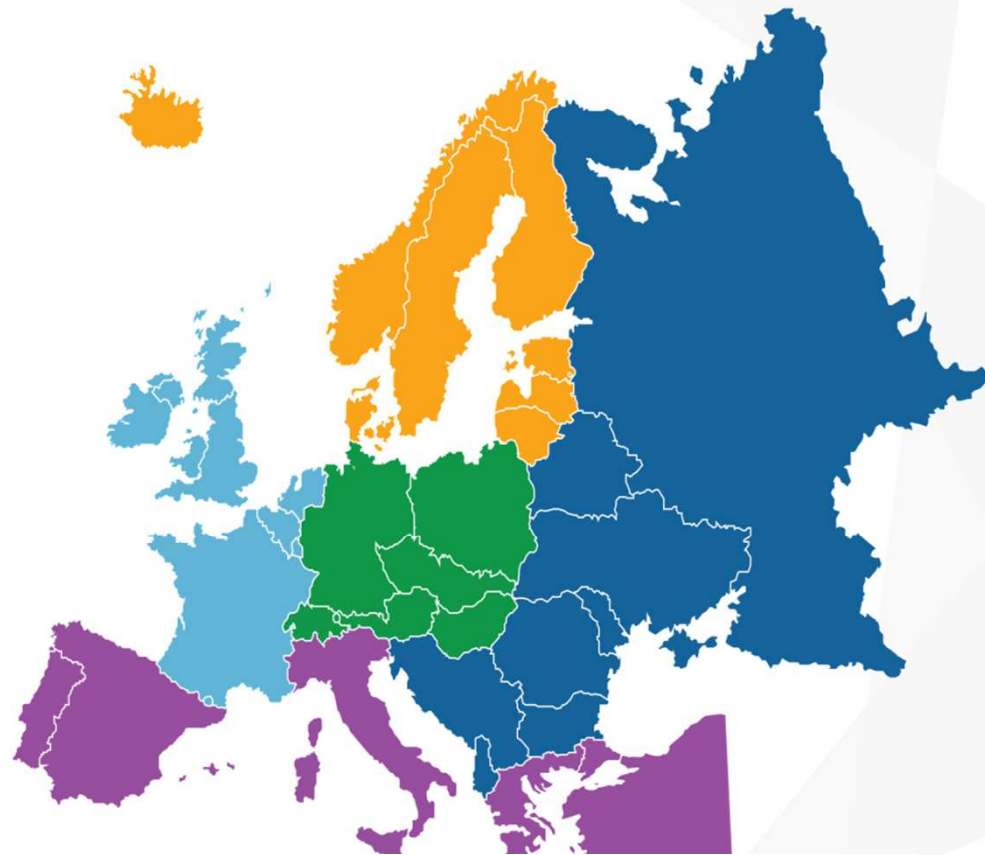


The market is growing at an annual rate of around **35%**

10,3
billion
Russian
e-commerce
market



East Europe



European countries, including EU28, Ecommerce Europe, 2013

Cina

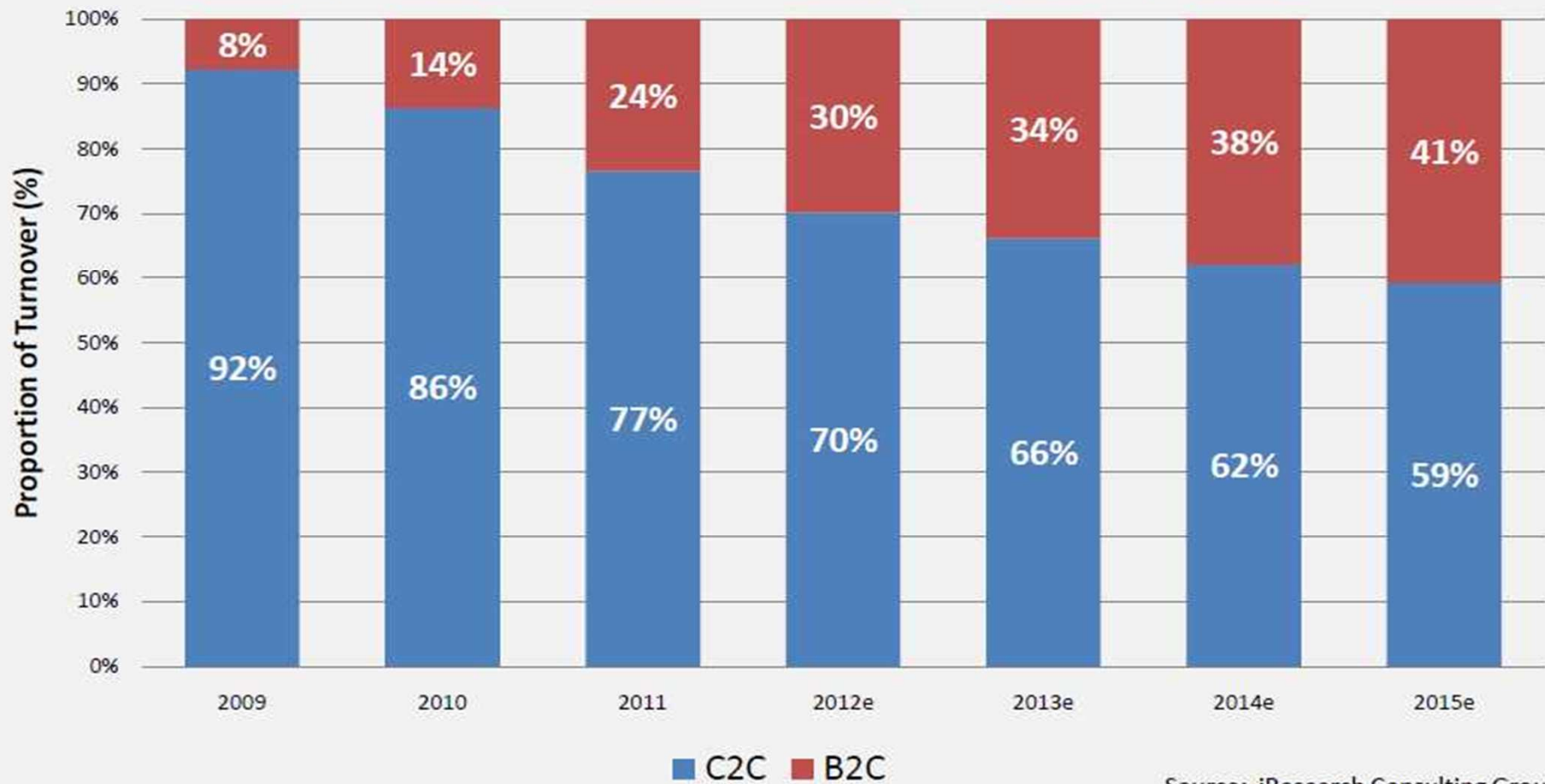


Tra le prime 20 città del mondo, come crescita, 14 sono cinesi

Rank	City	Country	Population (millions)		GDP (billions of U.S. dollars)			
			2010	2025	2010	2025	Total Growth	% Growth
1	Shanghai	China	22.3	30.9	\$250.7	\$1,112.2	\$861.5	344%
2	Beijing	China	18.8	29.6	206.2	1,027.9	821.7	398%
3	Tianjin	China	11.1	15.2	128.8	624.4	495.7	385%
4	São Paulo	Brazil	19.7	23.2	437.3	912.9	475.7	109%
5	Guangzhou	China	11.1	14.9	146.1	573.0	426.9	292%
6	Shenzhen	China	10.4	13.7	141.5	523.6	382.1	270%
7	New York	United States	18.9	19.7	1,180.3	1,553.1	372.7	32%
8	Chongqing	China	15.7	19.4	88.6	458.6	370.0	418%
9	Moscow	Russia	11.6	12.7	325.8	688.5	362.7	111%
10	Tokyo	Japan	36.4	36.7	1,874.7	2,218.6	343.9	18%
11	Wuhan	China	9.8	13.1	82.2	414.4	332.2	404%
12	Los Angeles	United States	12.9	15.0	731.8	1,051.5	319.7	44%
13	Foshan	China	7.2	10.8	83.5	383.6	300.1	360%
14	Istanbul	Turkey	11.0	14.9	188.2	479.7	291.5	155%
15	Nanjing	China	7.2	9.9	68.5	343.9	275.4	402%
16	Chengdu	China	7.7	11.2	57.8	309.6	251.7	435%
17	Hangzhou	China	6.2	8.8	70.5	307.0	236.5	335%
18	Dongguan	China	8.2	11.4	62.7	297.9	235.2	375%
19	Singapore	Singapore	5.1	5.8	222.7	454.1	231.4	104%
20	Shenyang	China	6.1	8.4	64.3	286.9	222.5	346%

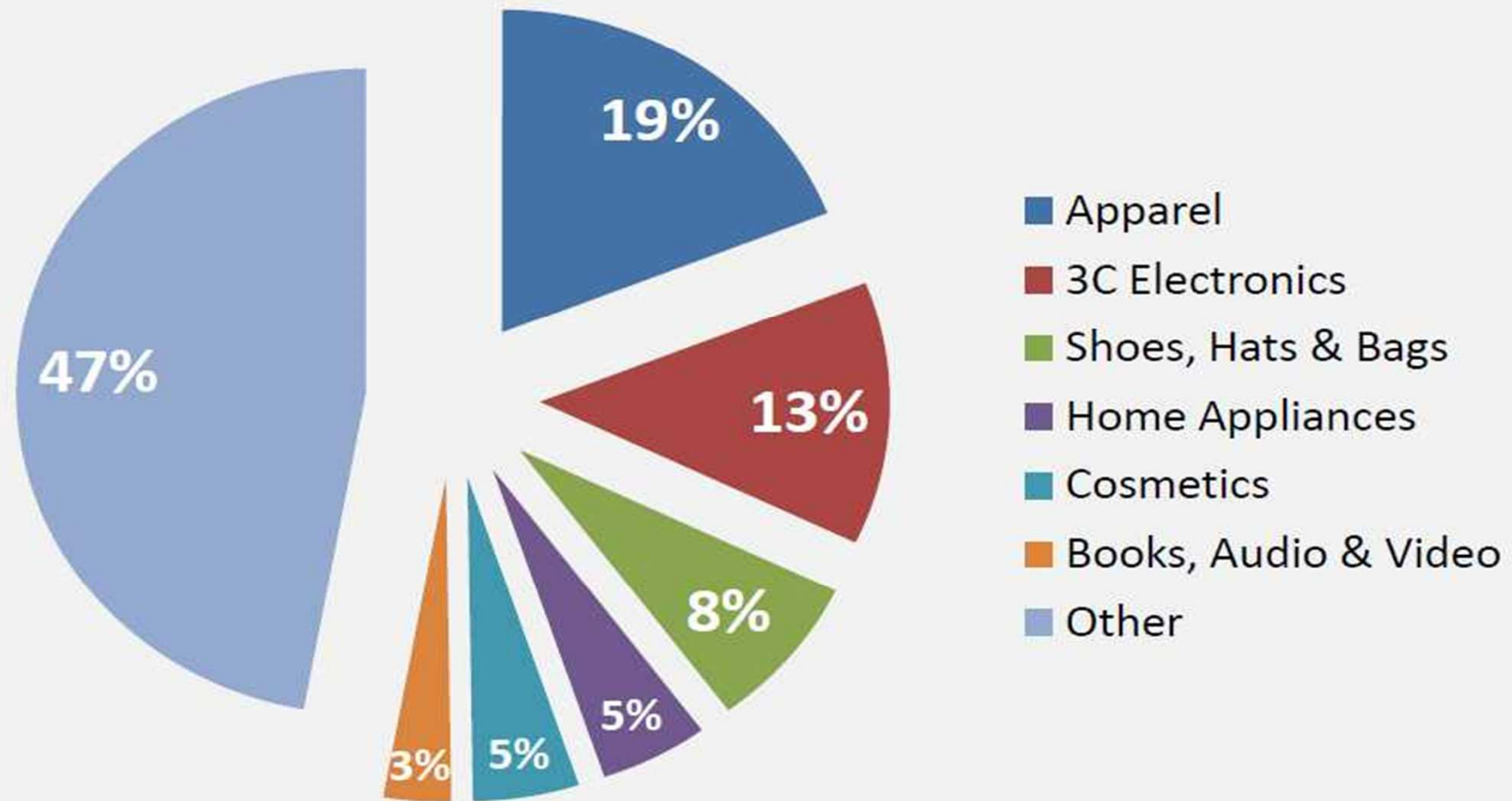
China's B2C sector has enjoyed rapid development in recent years; reaching **USD 56 billion** in 2012.

Revenue Distribution of China Online Shopping Market



Source: iResearch Consulting Group, 2012

Apparel, Electronics, and Fashion Accessories account for 40% of China's online shopping transactions.



Source: iResearch Consulting Group, 2012

SHOPPERS KNOW WHAT AND WHERE TO BUY

When you planned to buy this kind of product had you already in mind what it would have been ?	Were you already determined to buy it online?			
	I already planned to buy it online	I would have rather bought it online but I do not exclude to do it in a traditional way	I would have rather bought it traditionally, but I did not exclude to do it online	I was going to buy it in a traditional way
Yes, I was looking for this very product, of that very brand	67,6% Know what and where to buy		8,8%	0,6%
I had in mind different products, more or less similar			2,9%	0,0%
I knew what I needed, but I had not decided the product or the brand yet	3,5%	5,3%	4,1%	0,0%
I wanted to buy something of that very brand, but I did not know what	1,2%	1,2%	0,0%	0,0%
I was not going to buy that product, it just happened without me looking for it	4,7%			

- 40,6% Sure of channel and product
- 27,1% Oriented towards channel and product
- 12,4% Oriented toward product, not channel
- 4,7% "Shopping victims"
- 11,2% Oriented toward channel, not product
- 4,1% Confused

Product already decided before purchase: 67,6%

Channel (offline/traditional) already decide before the purchase: 51,2%

Communication channels in Cina

