THE STATE OF E-COMMERCE IN ITALY

27,4 bn/€

E-commerce value in Italy

+16% vs.2017

17,8 mio

Italian regular Web Shopper
(monthly shopping)

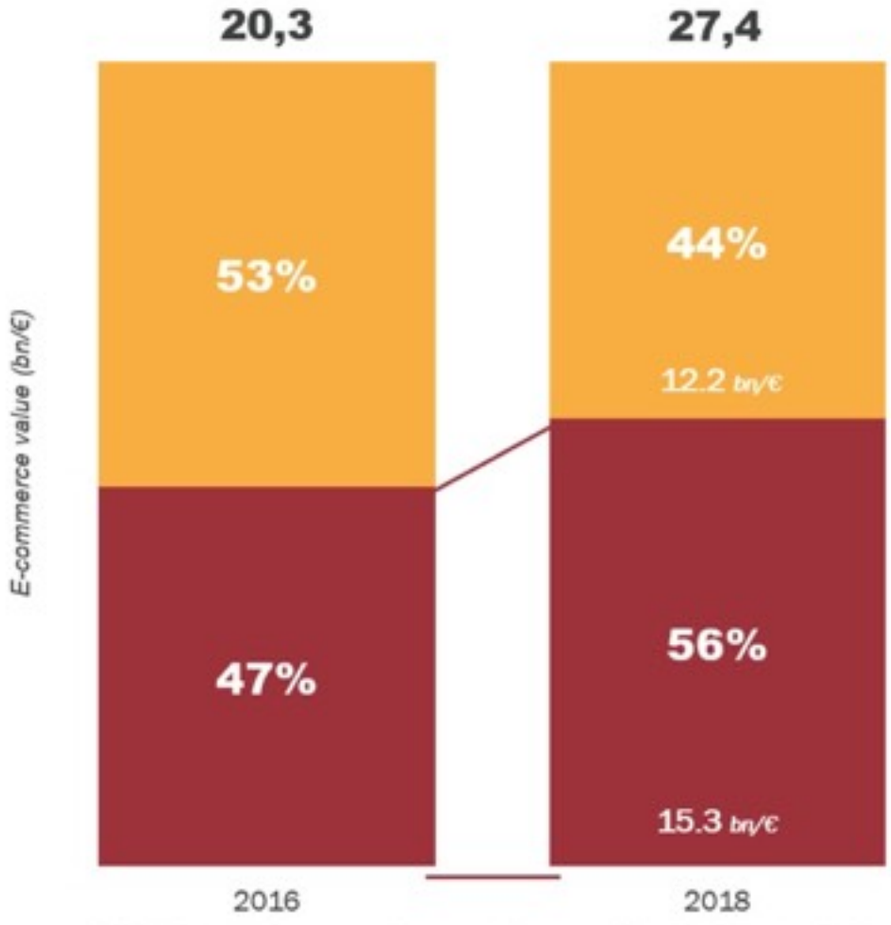
+11% vs.2017

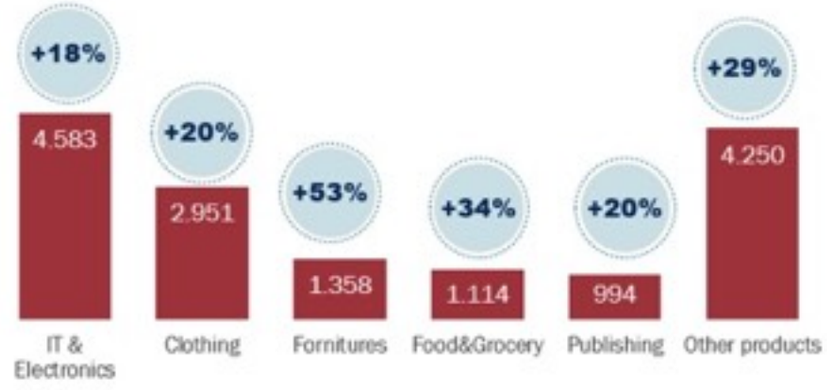
31,1%

Purchases through mobile

+15,0% vs.2016

MAJOR CHANGES GOING ON: E-COMMERCE IS BECOMING THE NEW PLACE FOR SHOPPING





SOURCE: GroupM elaborations on Osservatorio eCommerce B2c Italia - Politecnico di Milano data - 2018

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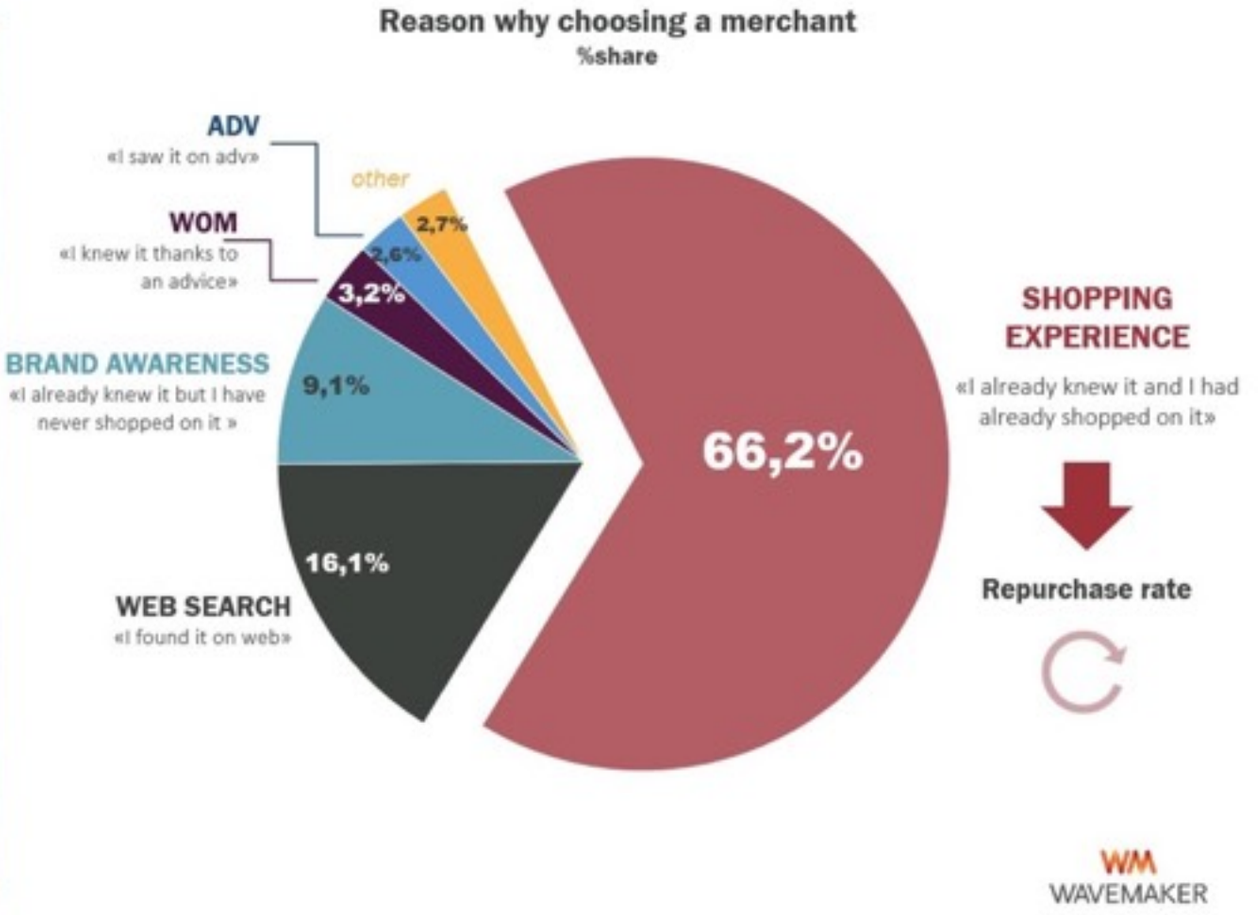
THE POSITIVE SHOPPING EXPERIENCE DRIVES CONSUMER'S CHOICE



SOURCE: GroupM elaborations on Net Retail data (Human Highway – 2018)

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NO MATTER THE PRODUCT OR SERVICE CATEGORY THIS IS HOW PURCHASE JOURNEY REALLY WORKS

Consumers at this stage are actively considering and moving towards purchase

A 'need' or 'want' that moves people from PRIMING to Active Stage

A purchase are made followed by post purchase actions

Consumers at this stage are not actively considering purchase, but exposed to brand and category usage and communications

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BUT BRANDS SHOULD BE ASSOCIATED WITH MOST IMPORTANT ONES

Top5 category territories

	Food & Drink	Beauty	Apparel	Consumer Electronics
1	International brands available	Fast delivery	Product variety	Positive online review
2	Positive online review	Global brand	Loyalty Program	Products easy to be found
3	Product review	Products easy to be found	Fast delivery	International brands available
4	Fast delivery	Easy replacement/changes	Products easy to be found	Loyalty Program
5	Product variety	Easy delivery status monitoring	Product review	Fast delivery

« ...i find products that are not in my preferred drugstore»

«Sometimes I run out with my facecare cream»

«It is very useful to get inspiration»

«Often I read reviews to understand better how the products works»

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WHICH TOUCHPOINTS COULD HELP TO CONVERT MORE PEOPLE TO E-SHOP?

	Food & Drink	Beauty	Apparel	Consumer Electronics
Top 3 in Active Stage	E-shop review	E-Product review	E-Product review	E-Product review
	E-Product review	Recommendation	E-shop review	Search
	Brand Website	Search	Amazon recommendation	E-shop review
Top 3 in Priming Stage	TV Ad	TV Ad	TV Ad	App Mobile
	Ooh Ad	Adv Online	Print	Email
	Brochure/Leaflet	Online article	Recommendation	Brochure/Leaflet

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ECOMMERCE END-TO-END APPROACH

Assessment of Context

Overall Italian eComm Mkt value: **~27,4 B€**

Italian beauty Market: **~380 M€**

Italian beauty Market is still small but info info-commerce is relevant for users:

Which touchpoints beauty shoppers consider before shopping:

Analysis of the industry and competitors

Online revenue share as % of total revenue: **From 3% up to 8%**

Growth objectives over next 3 years: **>30% per year**

Go to Market: Own Presence

- GENERATE Demand
- FULFILL Demand
- INFRASTRUCTURE mgmt

Go to Market: Marketplace (AMAZON)

AMAZON APPROACH

Sources: GroupM, Netcomm, Human Highway

WAVEMAKER APPROACH TO AMAZON

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