



CA

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E-commerce in Italy 2021

**CASALEGGIO
ASSOCIATI**
Digital Thinking

E-commerce consolidates: the great maneuvers



Intellectual property:
Casaleggio Associati
Digital Thinking

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We help companies to define their digital strategies and accompany them through the process of transformation, thanks to the solid experience we have gained since 2004.

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We conceive and implement digital transformation projects

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Goods and services sectors



FOODSTUFFS

Foods, beverages, supermarkets, restaurants



HOME AND FURNISHINGS

Furniture and home and garden items



PUBLISHING

Home videos, books, music, software, information



FASHION

Clothing footwear, jewellery, glasses



LEISURE

Betting, gambling, toys, sports goods, entertainment, telephony



INSURANCES

Car, motorcycle and home insurance policies



ONLINE SHOPPING MALLS

Varied products, Ebay (B2C)



CONSUMER ELECTRONICS

Domestic appliances, Hardware, Telephony, Photography, Audio



HEALTH AND BEAUTY

Perfumes, cosmetics, wellness, medicines



TOURISM

Transport, hotels, tour operators, attractions

Method

This Report was created through the investigation of studies and market research, news articles and experience in the field of Casaleggio Associati, and also an online survey and follow-up interviews with some of the key actors in the market. Participants: company owners, CEOs, general managers, marketing managers, country managers, e-commerce managers and Internet managers.

The companies examined are Italian or Italian branches of multinational groups. All the data presented refer to the Italian business to consumer market.

Introduction

The Opinion

Like a pot on the stove about to boil, just needing a tap on its side to start, the lockdown was the *tipping point* of Italian e-commerce.

Many sectors have suffered, mainly tourism which was always the driver of Italian online commerce. That is why 2020 has been a transition year. Those who were able to seize the moment have seen a significant growth in turnover (e.g., Food, because of closed restaurants) or profits (e.g., car insurance, because of the absence of accidents). For others it was a moment of survival (e.g., Tourism). That is why the e-commerce sector's end of year result has remained, for the first time ever in Italian history, basically the same as the previous year.

But 2020 really brought a maturation of e-commerce, it became truly mainstream. Millions of Italians have discovered the possibility of buying online and they will not forget it, even for the sectors that have suffered in recent months. That is why today e-commerce has become fundamental to the strategy of every production or distribution group in Italy.

When a sector goes through a maturation change there are many side effects. One of these is the takeovers made by companies that want to consolidate their position or that

want to make up for lost time. Another changing factor are infrastructures that are becoming critical to excel in the sector. For this reason, pressures are also emerging to define the game table. For example, for some years now, *network neutrality* is being discussed: equal access for all companies to the same quality and speed of Network (e.g., especially for streaming companies in the United States). Today, in Italy, we must also question other infrastructures such as *shipping neutrality*. The presence of large operators is in fact shifting attention and quality of service towards those who contractualize very challenging SLAs (Service Level Agreements) to the detriment of small Italian e-commerce operators with much less contractual force.

For this and other reasons linked to the economies of scale of the large international giants, new forms of aggregations are being created between companies which, through federations of micro-enterprises, are increasingly positioning as valid competitors (at least in perspective).

CHAPTER ONE

E-commerce condition

E-commerce in the world

In the world, there are 4.5 billion users accessing the internet, 7% more than the previous year, and overall, 59% of the global population. Of which 93% (4.3 billion) access the network from a mobile phone, 1% more than the previous year.

The Asia-Pacific area is the first for number of users, with 2.4 billion people accessing the Internet, over 50% of the total¹. China alone had 990 million internet users at the end of 2020².

The average Internet penetration is 59%, with a peak of 70.4% in China and in the world there are about 2 billion websites, of which 400 million are inactive³.

Mobile accounts for 55.73% of world traffic on average (+3% YoY), while 41.46% comes from desktop and 2.81% from tablet⁴. This means that mobile has become the most used device.

The mobile traffic reaches peaks of 65% (+3%) in Asia and 63% (+3%) in Africa. In Europe it represents 52% (+9%) of the total traffic and in North America 50% (+2%)⁵.

Last year, 81.5% of internet users looked up a product or a service online, 90.4% visited an e-store and 76.8% purchased a product online⁶.

According to the most updated estimates, global e-commerce has produced a turnover of 10.780 billion, considering B2C and B2B together⁷. Online retail trade, which last year accounted for 23% of the total⁸, now accounts for 39% due to a combination of decreased B2B transactions caused by many business closures and the rise in B2C.

The global B2C e-commerce is worth 4,280 billion dollars, 27.6% more than the previous year. It is estimated that the turnover will reach 4.891 billion during 2021, with a 14.3% growth rate⁹.

The 2020 B2C e-commerce turnover represents 18% of total retail sales, compared to 13.6% of 2019¹⁰, a growing and positive figure, considering that total retail sales worldwide have decreased by 3.0% on average¹¹.

Before the crisis, companies made over 30% of their sales online (on average 28% in their marketplace, and 6% on their websites).

During lockdown, 65% of sales were made online: 38% on marketplaces and 27% in the brand stores¹².

Comparing the B2C e-commerce sales to the total amount of Retail sales, China is the country ranked first, with a 44% impact which this year is expected to reach 52.1%. In second place there's South Korea with 28.9%, followed by the UK with 28.3%, Denmark 19.1%, Norway 17.6%, the USA 15%¹³.

Retail sales in e-commerce have grown in average of 27%. Many countries have experienced exceptional growth. For example, Latin America, with a growth of 36.7%, despite having worse drops in overall retail sales of average (3.4%). In Argentina, retail e-commerce grew by 79.0%, close to 71.1% of Singapore.

North America had a growth of 32%, Central and Eastern Europe 29%, Asia-Pacific and Western Europe 26%, the Middle East and Africa 20%.

The Asia-Pacific area continues to prevail on online purchases, with over 63% of the share and a turnover of 2,448 billion dollars (compared to 2,271 of the previous year).

China alone generates 2.090 billion dollars – 1.935 billion last year – and represents 48% of the market.

North America follows with 749 billion dollars, Europe, Latin America, the Middle East and Africa¹⁴.

During this Pandemic year, the internet has been used to get information, make purchases, leisure, stay social but also for remote working, with video call tools¹⁵. For example, at the beginning of 2021, Microsoft Teams had 115 million active users on the average day, 53% more than last year¹⁶. In the fourth quarter of 2020, Zoom increased its clients by 470%, with more than 10 employees, compared to the same quarter of the previous year and increased its turnover by 369%¹⁷.

1: Digital 2020, We Are Social & Hootsuite, 2021; 2: 47 ° Rapporto statistico sullo sviluppo di Internet in Cina, CNNIC, 2021; 3: How Many Websites Are There? How Many Are Active in 2021?, Hosting Tribunal, 2021; 4: Desktop vs Mobile vs Tablet Market Share Worldwide, Statcounter, 2021; 5: Desktop vs Mobile vs Tablet Market Share Worldwide, Statcounter, 2021; 6: Digital 2021, We Are Social and Hootsuite, 2021; 7: \$6.5 Trillion Worldwide Business-to-Business E-Commerce Industry to 2027 - Impact of COVID-19 on the Market, ResearchAndMarkets, 2021; 8: In-depth: B2B e-Commerce 2019, ecommerce DB, Statista, 2019 e Global Ecommerce 2019, eMarketer, 2019; 9: Worldwide ecommerce will approach \$5 trillion this year, eMarketer, 2021; 10: Worldwide ecommerce will approach \$5 trillion this year, eMarketer, 2021; 11: Global Ecommerce Update 2021, eMarketer, 2021; 12: European brands: relying on marketplaces isn't sustainable, Ecommerce News, 2021; 13: In global historic first, ecommerce in China will account for more than 50% of retail sales, eMarketer, 2021; 14: Global Ecommerce 2020, eMarketer, 2020; 15: How 2020 changed the way we use technology, Financial Times, 2021; 16: Watch out Zoom: Microsoft Teams now has more than 115 million daily users, TechRepublic, 2021; 17: Zoom Video Communications Reports Fourth Quarter and Fiscal Year 2021 Financial Results, Globe Newswire, 2021.

Video streaming has also strongly increased over the last year and all the players of the sector have benefited from it. From Netflix to the social media Twitch, from DisneyPlus to Amazon Prime Video. On-demand subscription services increased their turnover by 32%¹⁸.

The same trend has also been seen in the music sector. Spotify for example in the fourth quarter of 2020 had 345 million active monthly users and 155 million subscribers, compared to 271 users and 124 million users in the same quarter of 2019¹⁹.

Tencent Music Entertainment declared that the revenue coming from online music subscriptions has increased by 70% in the first quarter of 2020. At the end of 2020, 443 million paid subscription account users were registered, up 17% from the previous year²⁰.

Compared to digital services, the turnover of events (sports, music and cinema-related) registered a -46%, but food delivery services registered +26% for services provided by restaurants and platforms. The turnover of dating services also grew of + 10%, as well as that of fitness services with +30% (applications and wearables)²¹.

E-commerce in Europe

Europe is the continent with a higher Internet penetration, amounting to 89.4%, an increase of 4.5% compared to last year²².

The purchasers are 480 million, compared to 455 of last year²³.

Online retail sales amounted to 376 billion euros, 67 billion euros more than last year, beyond the expected estimates of 343 billion euro in 2020.

The Food and Health sector grew the most in percentage (29.6%) and reached a turnover of 56 billion euro. Followed by Home and Furniture (20.6%) with 60 billion, Fashion (19.9%) with a 127 billion euros turnover, Leisure (17.59%) with 76 billion, Consumer Electronics and Media (16.9%) with 91 billion.

In Europe the average annual turnover per user is 782 euro²⁴ (+14% YoY).

During the pandemic, the EU countries have dealt with the opening of physical stores differently. This element influenced the trend of e-commerce and has supported brand retails that had to shut down temporarily²⁵.

About cross-border e-commerce, 220 million European consumers have shopped in other countries, compared to 217 the previous year²⁶. China is the preferred destination for online shopping, followed by the UK, USA and Germany. On average, 73% of users have shopped through a marketplace, with peaks above 90% in the UK, Spain, Germany, Poland and Italy²⁷.

Opening of Shops



Yes

Finland, Norway, Portugal,
Romania, Spain, Sweden,
Switzerland



Yes,

only for essential products

Belgium, Bulgaria, Czech
Republic, Denmark, Germany,
Greece, Italy, Poland



Yes,

**only if for essential products
and with inaccessible
non-essential areas**

Austria, France, Ireland



No

The Netherlands

Chart source: Ecommerce is lifeline for physical retail, Ecommerce News, 2021.

18: Video Streaming (SVoD), Statista, 2021; **19:** Company Info, Newsroom, Spotify, 2021; **20:** Musica, la discografia è in salute: mercato globale in crescita, tiene l'Italia, Il Sole 24 Ore, 2021; **21:** Revenue in the eService market, Statista, 2021; **22:** Internet Usage in the European Union, Internet World Stats, 2021; **23:** Users in the e-commerce market, Statista, 2021; **24:** eCommerce - Europe, Statista, 2019; **25:** Ecommerce is lifeline for physical retail, Ecommerce news, 2021; **26:** E-commerce in Europe 2020, Postnord, 2021; **27:** E-commerce in Europe 2020, Postnord, 2021.

The United Kingdom is stable in the first position as a bigger European market and it keeps growing.

Brexit and the pandemic have determined the e-commerce import/export results for the United Kingdom: in 2020, 36% of users have shopped in other countries, while the UK cross-border e-commerce sales increased 57% on an annual basis. The increase has started in April up to winter holidays with a significant peak from September²⁸.

In Spain 44% of users shopped online more often than last year²⁹. Online shopping occurred at least once a week and 15% of these people shopped even several times a week. 43% of them stated to shop online at least once a month³⁰.

Belgium is the second market in which online shopping was more frequent than in 2019, even if this did not correspond to an increase in turnover. In fact, there was a 10% decrease compared to last year due to a decrease of services purchase and an increase in products purchase³¹.

Then, in the ranking of the countries that buy most frequently there are Italy, the Netherlands and Poland³².

Over 2020 Germany has seen an e-commerce increase of 14.6% (83.3 billion euros) compared to 11.3% the previous year. 4 out of 10 clients shopped more than once a week and almost 1 out of three online buyers were over 60 years old. While in 2019, this target represented less than a quarter of e-commerce sales in the country³³.

Last year, Poland had an e-commerce turnover increase of 25%, reaching 22 billion euro, and launched around 11,000 new e-commerce websites³⁴.

In 2020, Europe had to face problems linked to logistics. Logistics investments have been the highest since 2013, amounting to 38.64 billion euro³⁵.

54% of European brands believed that the potential of their e-commerce is paralyzed by their logistical capabilities. Currently, 59% of European companies also depend on marketplaces to cope with the logistic issue, compared to 46% of American companies³⁶.

Concerning the legislation, Europe is continuing the process of defining the Web Tax and is aiming to reach a global agreement within this year, with thanks also to the openness by the USA³⁷. Meanwhile, Italy, after its implementation in 2020 and with some delays, is proceeding with the collection of tax from those, including non-residents, who in the last year obtained (anywhere in the world) revenue of at least 750 million euro, of which at least 5.5% occurred in Italian territory³⁸.

The European Commission has recently launched the Access2Markets portal, to provide information and guidelines to the companies involved in international commerce³⁹.

The new European legislation for the security of digital payments came into force on the 31st of December. It requires the use of Strong Customer Authentication (SCA), one of the pillars of the second European directive on payment services (Psd2). It is estimated that in Europe there is a risk of a loss of about 108 billion euros due to likely system errors, longer transaction timing, and customer abandonment of the purchase⁴⁰.

Europe has accelerated the process of revising the NIS (Network and Information Security) directive, which has been put to the test by increasing digitization. Among the proposed measures: the extension of the scope of the directive, the risk management and reporting procedure for cyber security incidents, the strengthening of cooperation between Member States, an increase of the penalties for violations of the management measures of the risk and notification obligations (up to 10 millions euros or 2% of the total annual global turnover of the operator concerned). The proposal is expected to reduce the costs of cyber security incidents by approximately 11.3 billion of euro⁴¹.

28: Cross-border ecommerce in UK up 57%, Ecommerce News, 2021; **29:** E-commerce in Europe 2020, Postnord, 2021; **30:** 76% of Spaniards buy online more than before the pandemic, Ecommerce News, 2021; **31:** Ecommerce in Belgium: €10.26 billion in 2020, Ecommerce News, 2021; **32:** E-commerce in Europe 2020, Postnord, 2021; **33:** Ecommerce in Germany was worth €83.3 billion in 2020, Ecommerce News, 2021; **34:** Ecommerce in Poland breaks records, Ecommerce News, 2021; **35:** European logistics investments: €39 billion in 2020, Ecommerce News, 2021; **36:** European brands: relying on marketplaces isn't sustainable, Ecommerce News, 2021; **37:** Web tax: spiraglio dagli Usa, obiettivo accordo entro luglio, Wall Street Italia, 2021; **38:** Digital tax, proroga scadenza imposta servizi digitali 2021. Chi paga e calcolo, le istruzioni AdE, Informazione Fiscale, 2021; **39:** European Commission launches Access2Markets portal, Ecommerce News, 2021; **40:** SCA Economic Impact Assessment, CMSPI, 2021; **41:** NIS 2: verso una nuova strategia in ambito cybersecurity, IUS in Itinere, 2021.

CHAPTER TWO

E-commerce In Italy

According to an estimate, last year more than 390,000 companies in the non-food trade and market services have shut down, compared to 85,000 new openings, a total of -11.3%⁴².

On the contrary, 10,467 companies registered in the Business Register with ATECO code 47.91.1 relating to e-commerce (primary or secondary), compared to 6,968 the previous year. There was 50% growth, while last year it was 20%⁴³.

In addition to new businesses, it is also important to consider already existing SMEs: before covid the SMEs with e-commerce on their website were 9%, while at the end of the year they increased to 17.2% (+ 8.2%). Many SMEs have chosen to sell via social media or other methods (e.g., online forms), going from 15.6% pre-emergency to 27.8% (+12.2 points)⁴⁴.

In Italy, the diffusion of internet in the population (from 2 years and up), in December 2020 has reached 74.7% (+4.7% compared to last year) with 44.7 monthly unique users and a growth of 3.2 million users.

Users accessing the internet from a smartphone are 39.3 million (90% of the adult population).

On an average day, 32.2 million people connect and 70.9% from smartphones, for an average time of 2 hours and 18 minutes⁴⁵.

The average expense per e-shoppers amounts to 674 euro⁴⁶. 67% of users have purchased online from foreign websites and nearly all have purchased through marketplaces: 94% on Amazon, 52% on eBay and 44% on Zalando⁴⁷.

Brands had to face the increase of their user base and the evolution of consumption habits.

Areas such as the digitization of payments, warehouse and logistics management, and the development of the relationship with the customer have become crucial over the last year. For example, in 2020 58% of interactions with brands took place online, an increase of 17% compared to 2019⁴⁸. A percentage which will continue to grow in 2021, because of the demand from consumers for the digitization of brands. More than 16 million Italians think that the change in their habits after the health emergency is irreversible⁴⁹.

Compared to the results of the survey "Selling online in the time of Coronavirus" published by Casaleggio Associati in March 2020⁵⁰ according to which most of the e-commerce companies interviewed (54%) had seen their turnover drop due to Coronavirus, 21% had seen an increase and 25%

had not yet perceived its impact. 2020 closed with 68% of companies declaring an increase in the turnover (with an average change in turnover of +56%). 20% of the interviewed companies said they had a turnover drop, halving it compared to the previous year, while 12% managed to keep it stable. The number of companies that have sold more through e-commerce is therefore positive. However, many of these companies belong to sectors that matter relatively little on the total e-commerce turnover, therefore this positive trend is not enough to shift the balance of the total turnover.

Impact of Coronavirus on e-commerce turnover during 2020

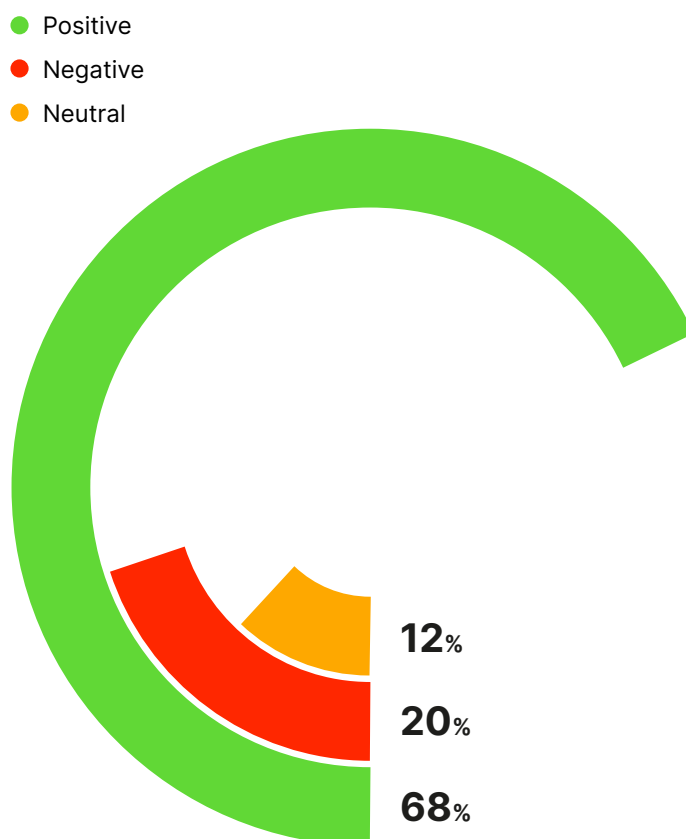


Chart source: Casaleggio Associati, 2021.

⁴²: Nel 2020 hanno chiuso oltre 300.000 imprese per Covid e crollo dei consumi, AGI, 2020; ⁴³: Telemaco, Sportello telematico per l'accesso al Registro Imprese, Infocamere, 2021; ⁴⁴: STUDI – MPI più digitali nell'emergenza sanitaria: raddoppia la vendita con la Rete, triplica l'uso di videoconferenze, Confartigianato, 2021; ⁴⁵: Total Digital Audience del mese di dicembre 2020, Audiweb 2021; ⁴⁶: Ecommerce in Europe 2020, Postnord, 2021; ⁴⁷: E-commerce in Europe 2020, Postnord, 2021; ⁴⁸: Ripensare il rapporto con i consumatori in ottica digital-first per instaurare relazioni empatiche e personalizzate, Salesforce, 2020; ⁴⁹: Report Alvarez&Marsal: "il Covid cambierà radicalmente i consumi di 16,4 milioni di italiani", La Stampa, 2020; ⁵⁰: E-commerce in Italia 2020, Vendere online ai tempi del Coronavirus, CA, 2020.

E-commerce turnover growth

The e-commerce turnover in Italy in 2020 is estimated at 48.25 billion euro, with a decrease of -1% compared to 2019.

% change
Turnover in billions €

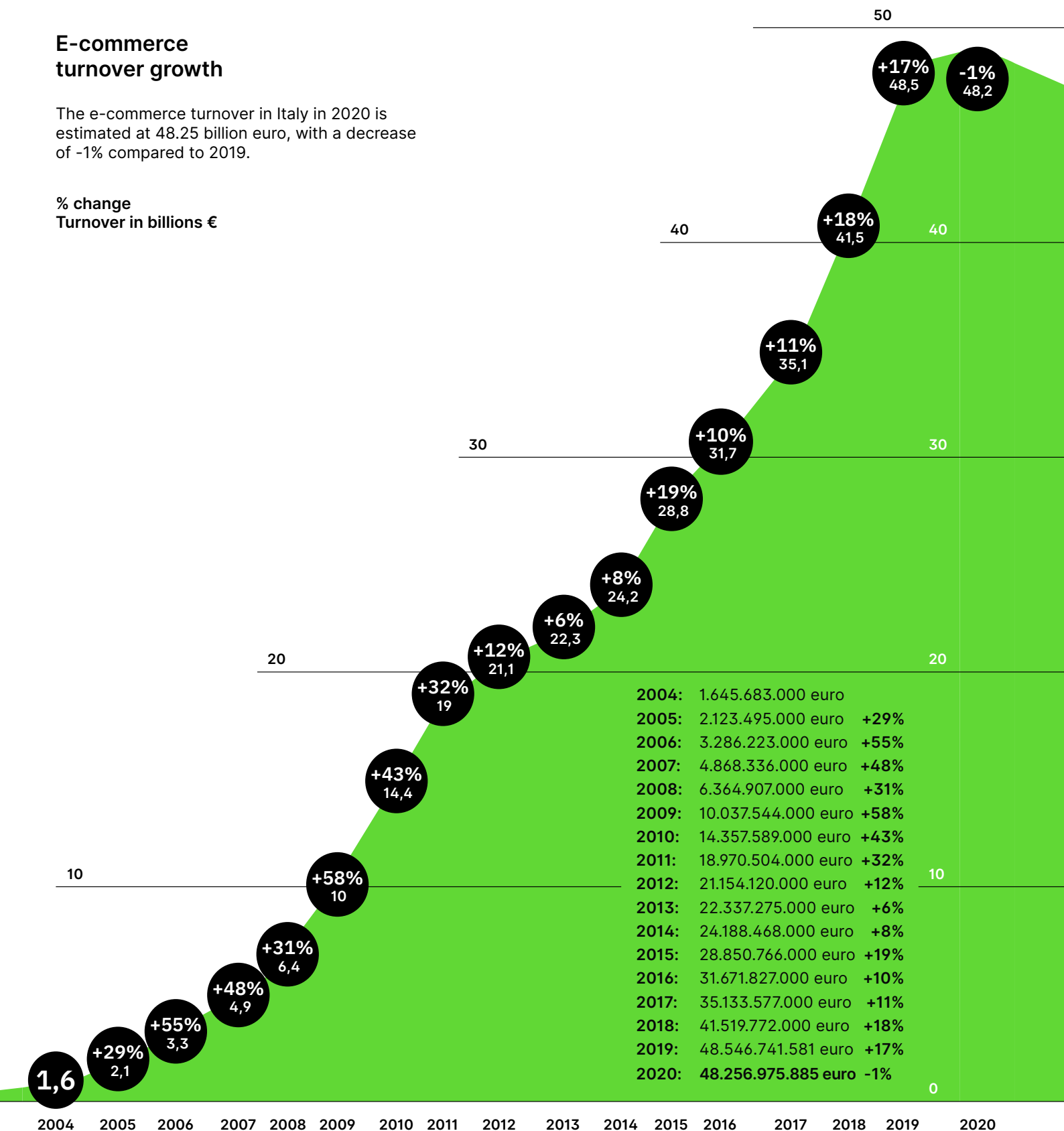


Chart source: Casaleggio Associati, 2021.

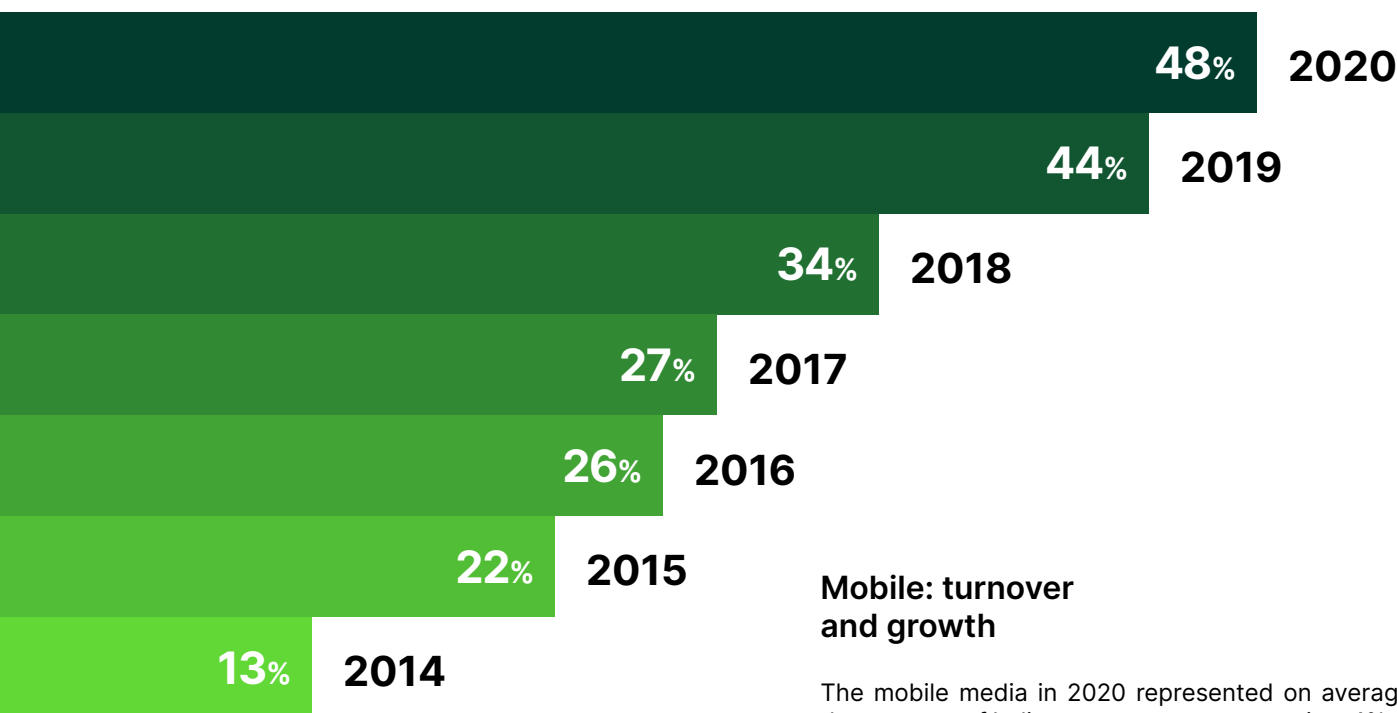


Chart source: Casaleggio Associati, 2021.

Mobile: turnover and growth

The mobile media in 2020 represented on average 48% of the turnover of Italian e-commerce companies, 4% more than last year.

Distribution of turnover in 2020

Because of the Pandemic, the **distribution of turnovers by sector has considerably changed** compared to previous years.

Leisure, for many years the most important sector, continues its trend and represents 48% of the turnover. The positive impact is given in particular by the growth of online gaming (not without risk for the under 18 age-range⁵¹), as well as purchases related to hobbies and sports. The growth was curbed by the entertainment sector, strongly affected last year and that has determined a sudden slowdown for the sector, which grew 12%, compared to 21% in the previous year.

In second place in the distribution of turnover, online Shopping Centres climbed one position with 21%, compared to 16% the previous year. The turnover growth is 36%.

Tourism is the most affected sector, with a loss of 58%. It accounts for 11% of the total turnover compared to 26% the previous year.

Insurance companies still maintained 5% share of the total with a growth rate of 6%.

The Food sector had the greatest growth compared to the previous year: +63% and therefore it gained 5% share of the total e-commerce turnover, gaining 2 percentage points compared to 2019.

Consumer electronics grew by 12%, reaching 4% of total turnover; then Fashion: stable at 2% of the total but with a surge of 14% compared to 2% the year before, but only partially covering the losses caused by the closure of physical stores. The publishing industry shared its same fate: not only the sale of books in 2020 generated +2.9% of copies sold on all media⁵², but online sales grew by 13% and the sector managed to maintain 2% share.

Last in the ranking are Health and Beauty / Home and Furniture. These two sectors still little affect the total, 1% each, but during 2020 they have grown considerably. The first one recorded the greatest growth after the Food sector of 39%, while the second had a growth of 24%, despite the overall loss of 8.9% of the furniture sector in Italy⁵³.

⁵¹: Virus dell'azzardo online, giovani sempre più a rischio: al giorno giocano fino a 1000 euro, l'Espresso, 2021; ⁵²: Il mercato del libro italiano resiste al 2020 difficile, La Repubblica, 2021; ⁵³: Il settore del mobile italiano è tra i più penalizzati dalla crisi, ma sa già come ripartire, Linkiesta, 2021.

Distribution of the 2020 e-commerce turnover in Italy

(Compared to 2019)

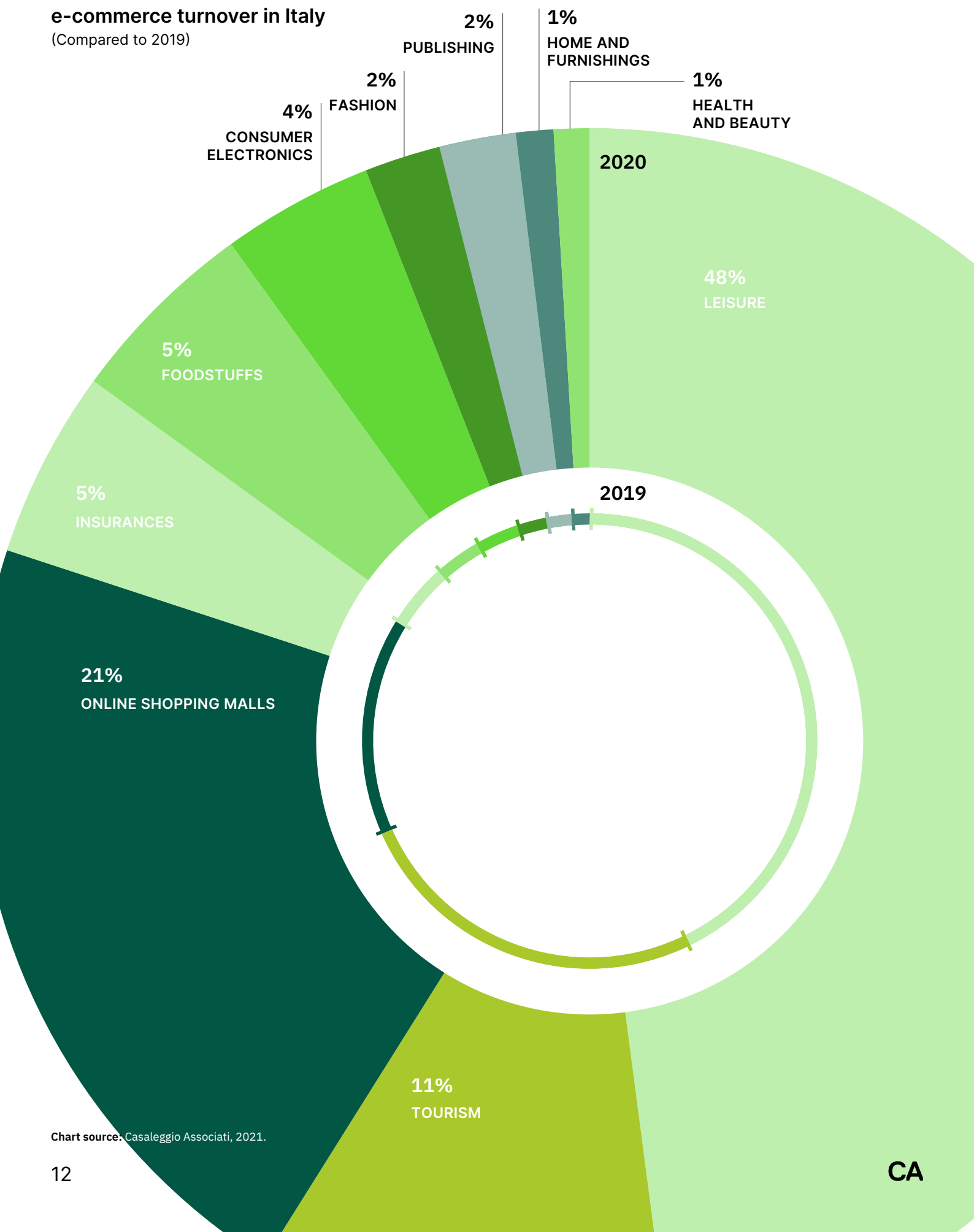
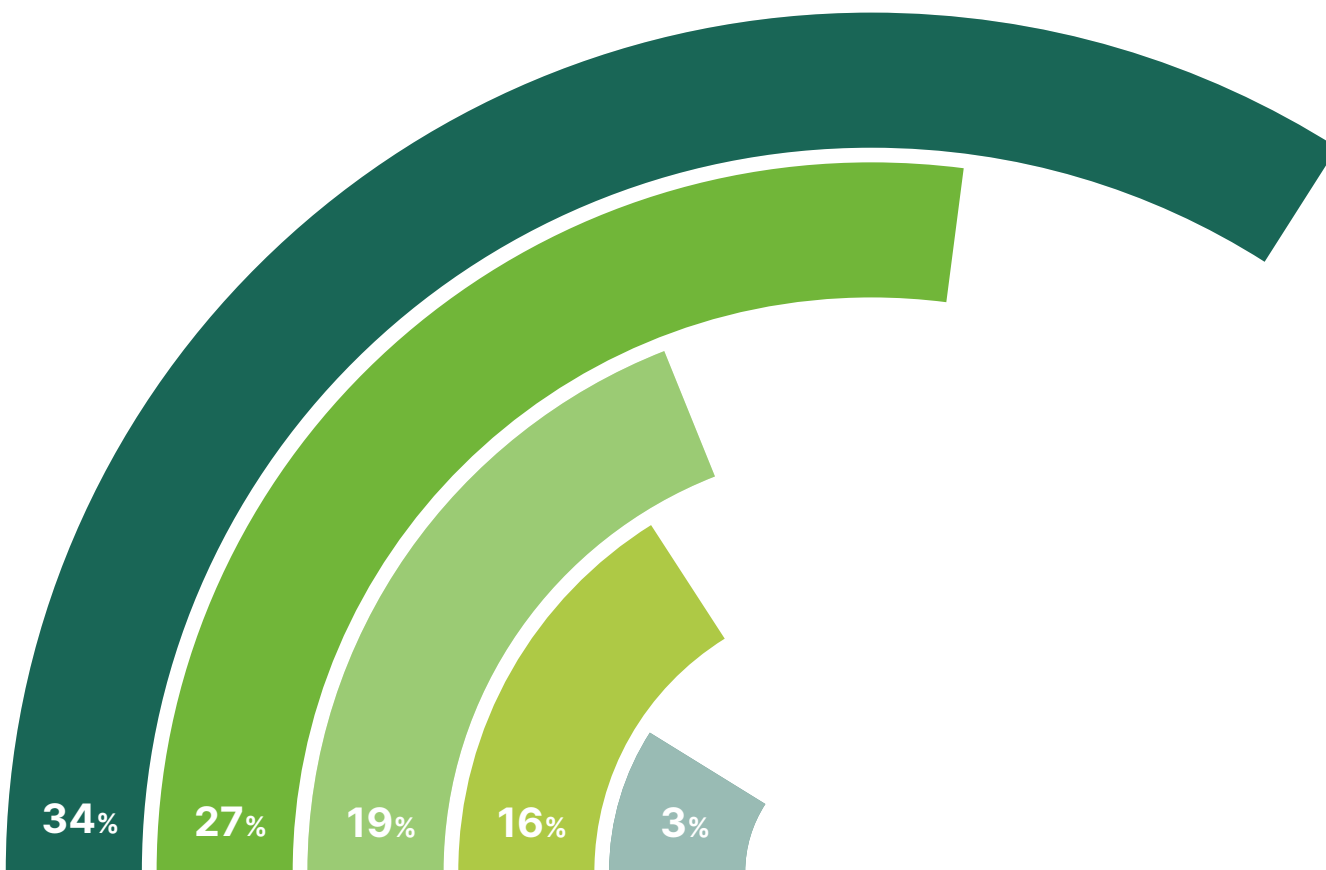


Chart source: Casaleggio Associati, 2021.

Main objectives of the digital 2021 strategy

(Multiple answers)

- New customer acquisition
- Customer loyalty
- Increase awareness
- Increase market share
- Other



In 2021, the trend of the sectors will strongly depend on the duration of the Pandemic.

It is estimated that the sectors that have increased their outlooks in 2020 will continue to grow. Based on current information, it is not possible to estimate the trend of the Tourism sector.

Among the main **objectives of the digital strategy**, set by the companies interviewed for 2021, are: for 34% the goal of acquiring new customers, for 27% retaining the current ones (sometimes gained last year with price-related incentives), for 19% to increase awareness, for 16% to gain market share compared to competitors, while for 3% other objectives.

CHAPTER THREE

E-commerce trends

2020 has reinforced already existing trends and imposed new ones that, mostly for B2C, must be considered for the future. These elements have entailed and will entail **great maneuvers** for both foreign and Italian companies.

Acquisitions

Throughout the last year there have been many take-overs in the e-commerce field, aimed at expanding e-commerce with the purpose of omnichannel. This phenomenon is observed both in Italy and abroad, and is expected to continue in 2021.

The motives of these confluences are mostly that:

- the economies of scale of the main competitors on the market are allowing great diversification on services and range offered;
- more and more brand companies want direct access to the online market and the quickest way is to take over operators already placed on that market;
- physical retail franchises see e-commerce as a necessity to be integrated in their business if only to manage the risk of closure, as well as future evolution;
- The customer acquisitions are growing again after an exceptional period linked to lockdown.

On a horizontal level, corporate acquisitions have strengthened the amount of geographical coverage (e.g. the long list of Amazon⁵⁴ acquisitions), the integration between different services (Uber buys Postmates to integrate its delivery offer, Walmart buys Art.com, Spotify buys SoundBetter to access to the marketplace of audio producers), or the vertical integration of the supply chain (Nestlé buys Freshly, Campari buys Tannico).

The multiples of these acquisitions are 1.1x on turnover and 10.2x on Ebitda worldwide, with some notable exceptions in Italy⁵⁵ also.

There were many takeovers aiming to strengthen the e-commerce in the Food field. Mondelēz International has recently acquired a majority interest of Grenade, a UK performance nutrition brand strongly present in e-commerce. About 24% of its sales are made online⁵⁶. Nestlé has acquired the UK company SimplyCook which provides a subscription recipe kit service, a monthly box containing four recipes and unperishable ingredients⁵⁷.

Barilla has acquired Pasta Evangelists, the UK brand specialized in production and distribution (via delivery box) of fresh pasta and high-quality sauces. In 2020, the brand increased its sales 300%, with more than 1 million pasta servings sold compared to 200 in 2016 its founding year⁵⁸.

In the last year, Carrefour has acquired many brands such as SuperSol in Spain, which has 172 supermarkets and Grupo BIG in Brazil, which has more than 45 million clients. In both cases among its motives, Carrefour said that the operations will be functional for the development of its e-commerce, since the stores will convert into new pick-up points for customers' orders⁵⁹.

Other examples in reference to acquisitions were already mentioned above: Uber Eats, which in the USA has a market share of 8% and collaborates with 600,000 businesses, has recently taken over Food delivery company Postmates. The two brands will continue to coexist since they work in different areas and have different targets, but it is a strategic move to compensate for the decrease in private passenger transport and address the increased demand for home delivery of lunches and dinners⁶⁰.

Nestlé has acquired Freshly, a meal delivery startup available in 48 states in the United States, delivering over 1 million meals a week⁶¹. In Italy, last year, the historic brand Campari announced the acquisition of 49% of Tannico, a leader in wine, sparkling wine, and spirits e-commerce, with the aim of reaching 100% by 2025.

Also, the fashion sector has invested in acquisitions. In particular, brands with strong digital and online sales have been acquired to strengthen e-commerce. This is the case for Boohoo, a UK clothing brand for young women also available in Italy, that has recently acquired Burton, Dorothy Perkins, and Wallis for 25.2 million pounds (29 million euros) with the aim of consolidating its position as an e-commerce operator in the sector. The brands will be incorporated in the multi-brand platform, while the network of the three brands' 214 stores in the United Kingdom was excluded from the operation, putting nearly 2,450 jobs at risk⁶².

⁵⁴: List of mergers and acquisitions by Amazon, Wikipedia, 2021; ⁵⁵: Hampton Partners, 2021; ⁵⁶: Mondelēz acquisition of Grenade provides "differentiated offer" as snacking giant delves deeper into sports nutrition, Food Ingredients, 2021; ⁵⁷: L'azienda fornisce una scatola mensile contenente quattro ricette e quattro kit di ingredienti non deteriorabili che vengono poi aggiunti agli ingredienti freschi che l'abbonato acquista dal supermercato, Food Navigator, 2021; ⁵⁸: Barilla cresce in UK con l'acquisizione di Pasta Evangelists, brand di pasta fresca con e-commerce, Beverfood, 2021; ⁵⁹: Carrefour completa la compra de las 172 tiendas de Supersol, El Pais, 2021 e Carrefour acquisisce il Grupo BIG di Walmart in Brasile, Blue Book Services, 2021; ⁶⁰: Uber si rafforza nel food delivery con l'acquisizione di postmates per 2,65 miliardi, Brand News, 2020; ⁶¹: L'acquisizione di Freshly da parte di Nestlé: il trend del delivery è qui per restare, Ninja, 2020; ⁶²: Boohoo buys Dorothy Perkins, Burton and Wallis for £25m, The Guardian, 2021.

Just like Asos acquired the brand Topshop, that only in the first quarter of 2021 had increased its sales on its marketplace by 41%. The deal does not include any of the 70 European physical stores. Asos plans to transform Topshop into a mainly online brand⁶³.

The federative model

During 2020 and in the first part of 2021 multiple players have aggregated in federation or corporation models, sometimes even in a cooperative mode, creating platforms and brands to be on the market with the strength generated by the union. This model allows proximity stores to be present online, even where individual efforts do not allow, to optimize presence, marketing, communication, and logistics management and has allowed several companies to resist and thrive in a time of difficulty, and to oppose, at least partially, the advance of marketplaces.

As in the case of Bookdealer, the e-commerce which brings together the independent publishing players and that in just a few months has managed to multiply the subscriptions: from 120 bookstores at the opening in August, to over 600 players at the end of the year. On the e-commerce you can select the book to purchase, the bookstore, read the bookseller's advice and earn points based on purchases. Where possible the store pickup is used, alternatively, the delivery costs €1.90 (divided between the library and the platform) and it is generally made on foot or by bicycle⁶⁴. This model of the Publishing field is also emerging in other Countries, such as in Spain where the Todos Tus Libros platform was created in November, promoted by the Spanish Confederation of Booksellers Guilds and Associations (Cegall), which brings together 789 bookshops and in the first week of business has sold over 5,000 books⁶⁵.

This method has also been adopted in the food sector, some examples are Campagna Amica and zero km markets and producers. Campagna Amica has been active for about 10 years and, in that time has involved 12,000 farms. In 2020, it launched its e-commerce and declared to have seen an "increase of visitors, 20% on average. During lockdown, home delivery services increased by 35% and farmers' e-commerce by 13%"⁶⁶.

Among other cases we find InTrentino project, launched by a Federation of co-operatives, selling online farm products of the associations that join the programme⁶⁷.

This model gained online even when the federation existed from some time. This is the case of Interflora Italia, the totally digital e-commerce flower and plant delivery service, which after a pandemic year had an exponential growth of sales.

The relationship

Over the last year, online companies have multiplied, as have the users. In most cases, brands have focused on presence

and sales, but those who have been (or will be) able to create relationships with customers, will have better possibilities in the future.

Today brands experience harder competition, mostly in the marketplace where usually the research is "unbranded". On the other hand, over the past few months, customers have sometimes transformed planned purchases into impulse purchases and have been guided by metrics dictated by needs.

This brings the companies to invest time, energy, and money to transform casual users into loyal users.

69% of users in the world want to speak with the company in real time⁶⁸ and 26% are satisfied with the shopping experience if they receive immediate assistance⁶⁹.

In this respect, many solutions for video streaming assistance (Visual CX) are being created. The consumer can make their request in real time to the operator through a video (often by using a smartphone camera), thus obtaining an immediate answer.

Both the personalization of the content based on the purchasing behaviour and the client's actions, and one based on the service/product, are a perfect way to create a bond.

Many websites are investing in technology to show the e-shopper customized results on the website and campaigns, or to support the user in choosing the product. For example, Yoox strategy, that has included in its shopping experience a tool that responds to the user's need to understand the wearability of the clothes, using the data obtained from returns.

Involving consumers in the process of creation was the fortune of brands such as Velasca. During the lockdown, the company from Marche that produces high-quality artisanal shoes invested heavily in giving its customers the opportunity to co-design shoe boxes, rewarding the most praiseworthy ideas with real challenges⁷⁰. Or as Nazionale Salotti, that launched its proprietary ecommerce on the Storenden platform in September 2020. The company proposes online selling of specialized furnishings for the living area, focusing on product personalization, which can be customized (coating and measures), but also focusing on the choice of purchase channels, digital payment methods and interaction channels, thanks to the use of Whatsapp and video consulting on the proprietary site.

An active presence on Social Media, that allows the creation of a personal community and the ability to interact directly by generating a dialogue, follows this trend. A channel that is pushing more and more on social commerce and therefore on sales.

Companies like Profumerie Sabbioni, body shop of Ethos group and among the five largest online companies in Italy, who last year considerably increased its sales thanks also to its strong presence on social media with social commerce

⁶³: With Topshop acquisition, Asos aims for international growth, Glossy, 2021; ⁶⁴: Bookdealer, le librerie indipendenti lanciano un e-commerce sostenibile e il libro arriva in bici, Lifegate, 2020; ⁶⁵: Todos Tus Libros, la alternativa a Amazon de los pequeños libreros, vende 5.137 libros en su primera semana, El Mundo, 2020; ⁶⁶: Nei mercati Coldiretti coinvolte 12 mila aziende, giro d'affari da 3,5 miliardi, Il Sole 24 Ore, 2021; ⁶⁷: E-commerce, Federcoop lancia la sua piattaforma, Trentino, 2021; ⁶⁸: What is Customer Journey Mapping & Why is it Important?, Salesforce, 2020; ⁶⁹: Digital Commerce 360 survey of 1,000 online shoppers, Digital Commerce 360, 2020; ⁷⁰: Retail e Ecommerce Durante L'emergenza Coronavirus: Intervista A Velasca, Confimprese, 2020.

and live events, but also through the one-to-one customer service on different channels (WhatsApp, email and phone) with the support of a “beauty consultant”.

Even the gamification subject follows this trend, aiming to create a relationship which tends to result in client loyalty: it is used by the big marketplaces such as Alibaba, that during Single Day, based sales on timed discounts, stimulating impulse purchases and created a point reward system for users who answered questions from other users, shared products on social networks and sent feedback and reviews. Others, such as Nintendo, multinational for consoles and video games, inserts gamification strategies within the user reserved area where they can get points and rewards by finishing missions or purchasing from the online shop. Even the rewards are digital and can be used within the reserved area but can be obtained by also inviting friends to play mobile videogames, subscribing to the newsletter, linking their MyNintendo account to personal social networks (Twitter, Facebook), it is an omnichannel gamification strategy.

Sustainability

The sustainability issue is increasingly relevant for e-commerce also. Last year in particular made it clear to the world how personal and company behaviors are responsible for the wellness of the planet. Sustainability, organic, circular economy, and green energy are concepts that have become part of the consumers DNA, especially younger ones and that are expected to also be in the companies DNA. Companies are replying to the requests on the subject, by implementing initiatives to reach the sustainable development goals established by the UN for 2030.

Over the last 12 months, searches related to this word have increased by 70%, searches on its meaning by 150% and those related to the Sustainability Report by 190%⁷¹.

43% of Italian online buyers are afraid that the increase in e-commerce sales volumes is a threat to the environment. 72% affirm that too much packing material is used and 77% that this material should be fully recyclable. Despite this, and despite 42% of Italians declaring to be willing to pay extra for more sustainable shipments, to date less than 1% of Italian online retailers could offer ecological delivery options.

Moreover, 63% of consumers declare to be more likely to buy from a company that shares information on the impact of its products on the planet⁷². 76% of users expect companies, not governments, to drive climate change⁷³.

Among big ones, many e-commerce players have joined the Climate Pledge to have zero carbon emissions by 2040. Last year, several marketplaces added labels that help consumers to navigate the sustainability of purchases, such as Amazon which has inserted “green” labels on over 40,000 products and the “Compact by Design” certification for items that reduce the impact of shipping and packaging⁷⁴, as well as Asos which launched the Asos Design Circular⁷⁵ collection or Zalando which aims to sell 25% more sustainable products

by 2023, while making sustainable product criteria more stringent⁷⁶.

In this regard, Fashion is working on different directions, so much so that an effect of this trend can be seen in the proliferation of second-hand e-commerce that promotes the circular economy (such as Lampoo, Vinted or the Vestiaire Collective). It is estimated that the secondhand market has registered a growth of 12% from 2018 to 2020 (compared to +4% of “first hand”)⁷⁷ and that circular fashion has a potential value of 5 trillion dollars, 63% more than the traditional fashion industry⁷⁸. Also, digital fashion is a response linked to the sustainability subject and is based mainly on the concept that 9% clients in developed countries only buy new clothes to post photos on social profiles. This evaluation has determined, on the one hand, the creation of fully digital fashion brands and, on the other, the evolution of traditional ones. As it is the case of Dress-X, the brand that allows the client to choose the clothes on the e-commerce, send their picture and pay. The order is processed within three days and the users receive the picture where they digitally wear the chosen outfit⁷⁹.

In the Leisure sector, subscription solutions emerge, such as that of the Swiss company On which launched Cyclon in 2020. The service sends a pair of running shoes weighing less than 200g and made with 50% organic materials which, after they are used, will be collected and fully recycled by the company and replaced with a new pair. The service costs 30 dollars per month⁸⁰.

The trend of sustainability also emerges in other sectors, such as Food and Beauty, which in the last year had a strong increase of producers who have gone online.

Over the last year, multiple marketplaces were created, such as Pensoinverde⁸¹, selling products and services linked to the green sector.

Even Ikea is very invested in circular economy. Within the year it will start selling replacement furniture and accessory parts, after reaching the goal of 98% wood from sustainable forests in 2020⁸². The use of apps such as Too Good to Go grows, the B Corp available in 15 countries recorded the highest growth rate in Italy last year: 2.5 million Italians have downloaded it in a year and a half, more than 9,000 registered businesses, 1.6 million meals “saved” in 2020 (one every 8 seconds)⁸³. Moreover, it has raised the interest of Italian companies for this social form, to such an extent that, in 2020, some of them (Danone, Mellin and Nutricia) became B Corp.

However, it should be noted that in 42% of cases the “green” credentials of the companies, unfortunately, are not corroborated by any evidence or data. According to the EU, the words “conscious”, “ecological” and “sustainable” are often used without readily accessible evidence to support them⁸⁴.

These trends are joined also by the omnichannel subject, which will be discussed later (p. 18).

⁷¹: Google Trends, Google, 2021; ⁷²: Ey Future Consumer Index, EY, 2020; ⁷³: What is a CSO and does every company need one?, World Economic Forum, 2021; ⁷⁴: E-commerce green, Amazon lancia il “bollino” Climate Pledge Friendly; ⁷⁵: Il manifesto di ASOS DESIGN CIRCULAR, Io Donna, 2020; ⁷⁶: Moda sostenibile, Zalando punta a diventare piattaforma di riferimento, AdKronos, 2021; ⁷⁷: La Moda di seconda mano vale 40 miliardi e punta alla Borsa, FirstOnline, 2021; ⁷⁸: Boom della moda circolare: vale 5 mila miliardi di dollari, Wired, 2021; ⁷⁹: Moda sostenibile: gli abiti virtuali di Dress-X, Vogue, 2020; ⁸⁰: The 10 most innovative companies in sports, FastCompany, 2021; ⁸¹: Si moltiplicano i siti di e-commerce sostenibile. L'ultimo nato è Pensoinverde, Wired, 2020; ⁸²: Ikea venderà i pezzi di ricambio per i suoi mobili, Wired, 2021; ⁸³: Così salviamo un pasto ogni 8 secondi, Vita, 2021; ⁸⁴: E-commerce sostenibile? La metà delle aziende fa solo greenwashing, Rinnovabili, 2021.

CHAPTER FOUR

Online marketing

Online presence

In 2020, the digitalization trend of Italian companies continued and accelerated albeit with some difficulties due to the many areas impacted by the health emergency.

Many brands had to go digital with improvised means, such as the opening of messaging or social channels. Others have relied on third parties, favoring platforms already consolidated on the market or purposely created federation platforms. Others have invested directly in their e-commerce or enhanced them.

In any case, those who have gone online or have consolidated their presence online have undoubtedly benefitted from the power of this channel and sectors, that until a year ago were the rear of Italian e-commerce, have flourished.

In the automotive industry, some are testing virtual dealers for purchasing cars online, such as the FCA Group by E-shop. For other dealers where the contract must be finalized in the dealership, FCA created a completely digital platform (currently only available for Italy) where it is possible to remotely sign or have the contract delivered.

In 2020, Mirta, an Italian fashion startup, increased the number of products on its e-commerce by 60% and increased its collaboration with artisan producers by more than 30%, by sharing Made In Italy in a time of strong cultural belonging with consumers who have allowed the company to also sell on foreign markets⁸⁵.

In 2020, MondoDelVino, producer and distributor of excellent Italian wines (mainly abroad), launched their B2C e-commerce where the sale is accompanied by the story of its bond with the Piedmont territory, the uniqueness of the vines and the culture of the winemakers.

In general, worldwide, e-commerce does not eliminate the need to buy in store and phygital solutions are increasing, aiming to combine physical and online solutions, and to benefit from the advantages of both. This is the case for Dior. Thanks to the collaboration with the startup VR Obsess (which saw its demand increase 300% in spring 2020 compared to the previous year), in February it launched a virtual version of the Paris store. The Dior VR store gives the clients of its French website an all-round 3D e-commerce experience. Users can virtually view the Maison Christian Dior collection of fragrances, soaps, candles and lotions, then zoom in on items and purchase them via the brand's online store.

E-commerce solutions

In 2020, on a global level, the leader in e-commerce solutions was WooCommerce, with a 28% market share. Squarespace and Shopify were in second and third place respectively with 18% and 11%⁸⁶. Last year, Shopify gained +2% of market share and this e-commerce solution grew the most compared to its competitors⁸⁷.

For e-commerce, the software applications market is estimated to generate a 6.5 billion dollar turnover in 2021 worldwide, with an increase of over 1.3 billion dollars between 2019 and 2024⁸⁸.

Italian companies can choose between a variety of e-commerce solutions, of those a third are specially made platforms. Among the most active foreign platforms in Italy is Magento. However, it continues to see its market shares decrease, because since the end of June 2020 it has decided to no longer support version 1 of the software, pushing some players, instead of using version 2, to use other platforms. Ecwid follows next. An e-commerce cloud solution for small businesses born in 2009 which in the first six months of last year saw its subscriptions increase by 143% and its turnover in Europe increase by 150%⁸⁹. WooCommerce Checkout (Wordpress plugin) and PrestaShop the open-source software with Carrefour and Danone as clients.

Shopify, which measures the trend of store opening speed in the various countries where it is used, has seen an acceleration in opening times in Italy of +400%, compared to +190% in Germany and +120% in England. In the last few years, Shopify is mainly used by companies in the fashion sector such as Chiara Ferragni, Velasca or Pittarosso, but also by small and medium Food or Furniture businesses, such as Alessi, Ventura and Bottega Sicana (an e-commerce of Sicilian food products managed through dropshipping and shipped directly to the customer by the producers).

ZenCart, an open-source software⁹⁰, is a player with 5% market share.

⁸⁵: La piattaforma Mirta volano per gli artigiani italiani durante l'epidemia, *ILSole24Ore*, 2020; ⁸⁶: Top global e-commerce platforms market share 2020, Statista, 2020; ⁸⁷: Shopify Market Share: 7 Stats that Show Shopify's Size, *Websitetooltester*, 2020; ⁸⁸: Global e-commerce software market size 2019-2024, Statista, 2020; ⁸⁹: Ecwid annuncia nuove partnership per i pagamenti, accelerando una crescita record in tutta Europa, *Ecwid*, 2020; ⁹⁰: Italy: e-commerce software provider market share 2020, Statista, 2020.

Among Italian companies there is Storen of Treviso that, for the second consecutive year, had a significant growth in the number of customers acquired and users. It boasts customers such as Supermedia, Pellizzari, Melinda and Val d'Oca (this year Postalmarket will reopen in digital mode). Furthermore, during 2020, it supported Italian companies by providing the platform free of charge for 60 days, an action that prompted many small businesses in the Food and Fashion sector to digitize. It has made and strengthened agreements with major payment partners, such as Nexi and PayPal, but also with alternative players such as Mobysign, the app that speeds up payment without entering credit card data⁹¹.

Omnichannel

Many Italian e-commerce companies (37%) have started developing an omnichannel strategy in 2020, at the beginning of the health crisis. While many companies, 27%, boast another level of implementation. However, almost 20% have not considered developing omnichannel strategies, while 12% plan to start next year⁹².

An omnichannel strategy is essential to establish a relation with the consumers according to their preferences: in fact, 40% of clients are ready to discard a purchase if they can't do it on their favourite channel⁹³.

Today, consumers around the world use an average of six touchpoints and nearly 50% regularly use more than four⁹⁴.

Each additional channel included in a sales strategy determines an increase in turnover for the company: for example, a consumer using more than 4 channels increases their spending by +9%.

Recognizing the client and understanding their purchasing behavior across all channels remains the main strategy that Italian e-commerce companies will activate in the next two years (for 17%, down compared to last year).

In 2019 the implementation of up and cross selling tools was the second priority of the companies interviewed (today at 11%), currently e-commerce companies are more interested in increasing sales through strategies that make product information available to consumers across all channels (for 16% of Italian companies).

Another strategy implemented, which remains stable compared to 2019 (with 14%), concerns the promotion of click and collect in store dynamics, which are fundamental given the prolongation of the Coronavirus emergency.

In 10% of cases, companies are also thinking of implementing store locators on their websites or apps, which may take advantage of geolocation, and they want to implement actions in favor of in-store and digital home payments (9%).

The need to give stores digital tools for accessing information and managing activities decreases (6%) compared to those actions in favor of Wi-Fi in store to promote personalized content and promote social commerce (3% of companies chose these strategies).

The need for strategies accepting purchase returns in store decreases to 5%, probably already implemented over the last year, but the need to promote self-check-out is growing (5% of companies).

3% declared they do not believe omnichannel can give be advantageous for conversions.

⁹¹: Storen e Mobysign: pagamenti con un click in tutta sicurezza, MyFruit, 2021; ⁹²: Survey E-commerce in Italia 2021, CA, 2021; ⁹³: How an Omnichannel Strategy Benefits Businesses and Customers, Salesforce, 2020; ⁹⁴: Fai crescere la tua Customer Satisfaction grazie al Cloud Omnicanale, CMI Magazine, 2020.



Chart source: Casaleggio Associati, 2021.

Online brand promotion

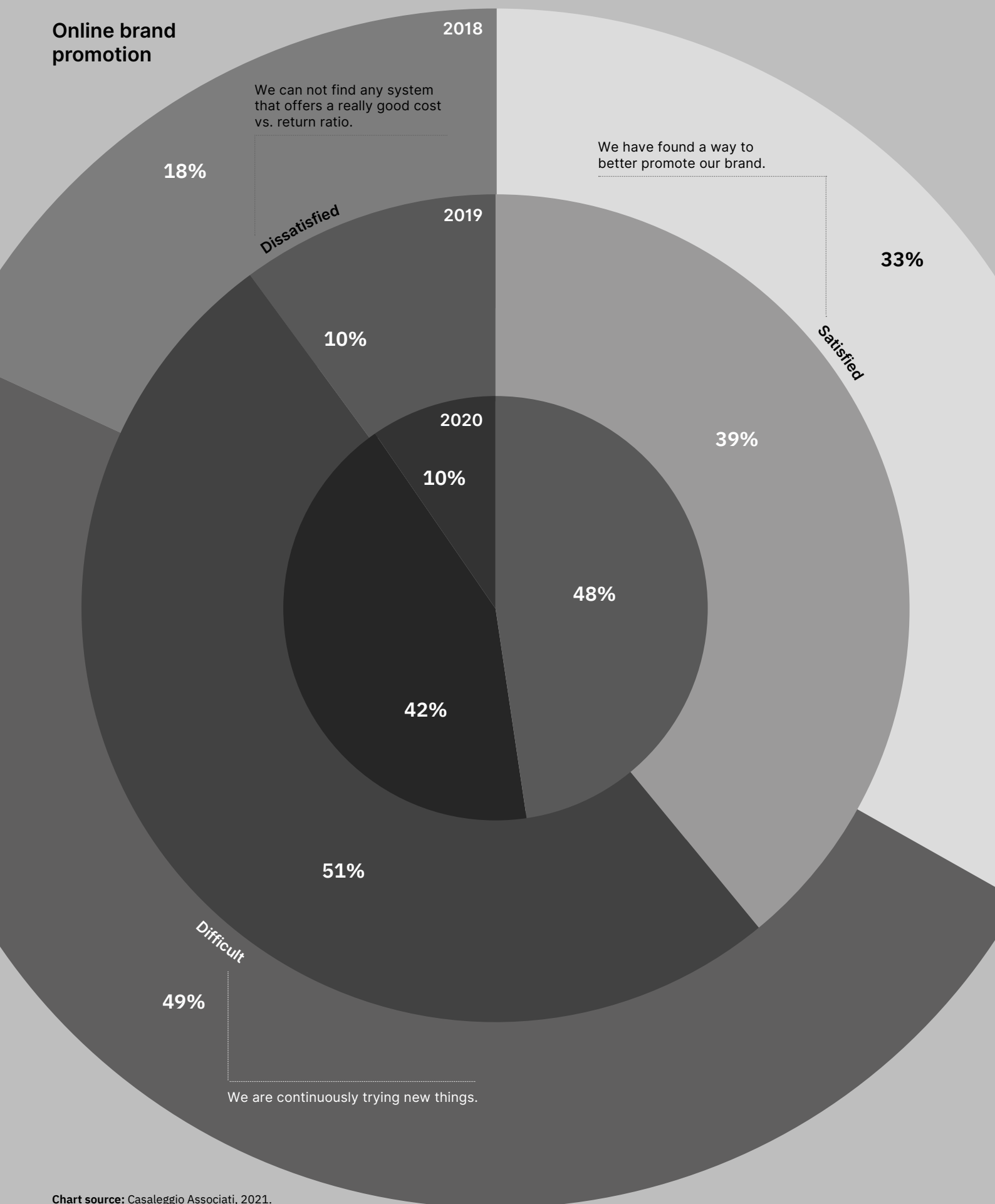


Chart source: Casaleggio Associati, 2021.

Marketing and advertising activity

In 2020, in the general international panorama, more than 42% of budget was destined to digital communication, while 58% is still destined to traditional marketing (direct marketing, tv, radio, out of home and newspapers)⁹⁵.

Examining Italian market, advertising in 2020 has lost 11% of investments, totaling 968 million euro. Transit, outdoor, and periodicals are losing the most, while digital is the component that loses less⁹⁶.

Moreover, digital advertising is growing each year, in 2020 it corroded 2 percentage points of traditional advertising, bringing the shares of the two markets perfectly to 50 each. In 2021 digital advertising it is expected to surpass traditional advertising⁹⁷.

Among the marketing activities, SEM (Search Engine Marketing) ones keep having the greatest investments (19%). In second place with 15% we find SEO (Search Engine Optimization) activities that earn 3%. In third place, there is Social Media 12%, followed by Email marketing 10%, Display advertising 6%, Comparators with 6%, Remarketing and Retargeting 6%. Sponsorships drop two percentage points to 5%, Affiliation and Programmatic remain at 3%.

A particular mention goes to TV, Radio and Press which drop from 13% to 5%.

In this panorama, the Search online market was worth about 1 million euro in 2020 and it is expected +15.6% in 2021⁹⁸.

The distribution of Search investment is also growing, with mobile reaching 35% of the market in 2020 (compared to desktop) with a growing trend for the next few years⁹⁹.

Market shares see the predominance of Google Adwords (85%), followed by Bing at 5%¹⁰⁰.

In Italy, the proprietary websites are one of the most used communication channels to talk to consumers (88%) and to retrieve information about them, get to know them and be able to offer a personalized product/service. 61.5% of CRM data are used by companies to develop effective customer experience strategies, it is a market that is growing rapidly all over the world (today it is worth 53.4 billion dollars and this year will become the largest expenditure for companies in the software field¹⁰¹).

The data coming from loyalty programs (51%) are useful for Italian companies and can be elaborated by analyzing the history of consumer transactions (47.5%), or the use data deriving from the product/service (37.8%). Social media is also a source of data useful for customized communication, 32.9% of which are used by Italian companies¹⁰².

Distribution % of marketing & advertising businesses
(Multiple answers)

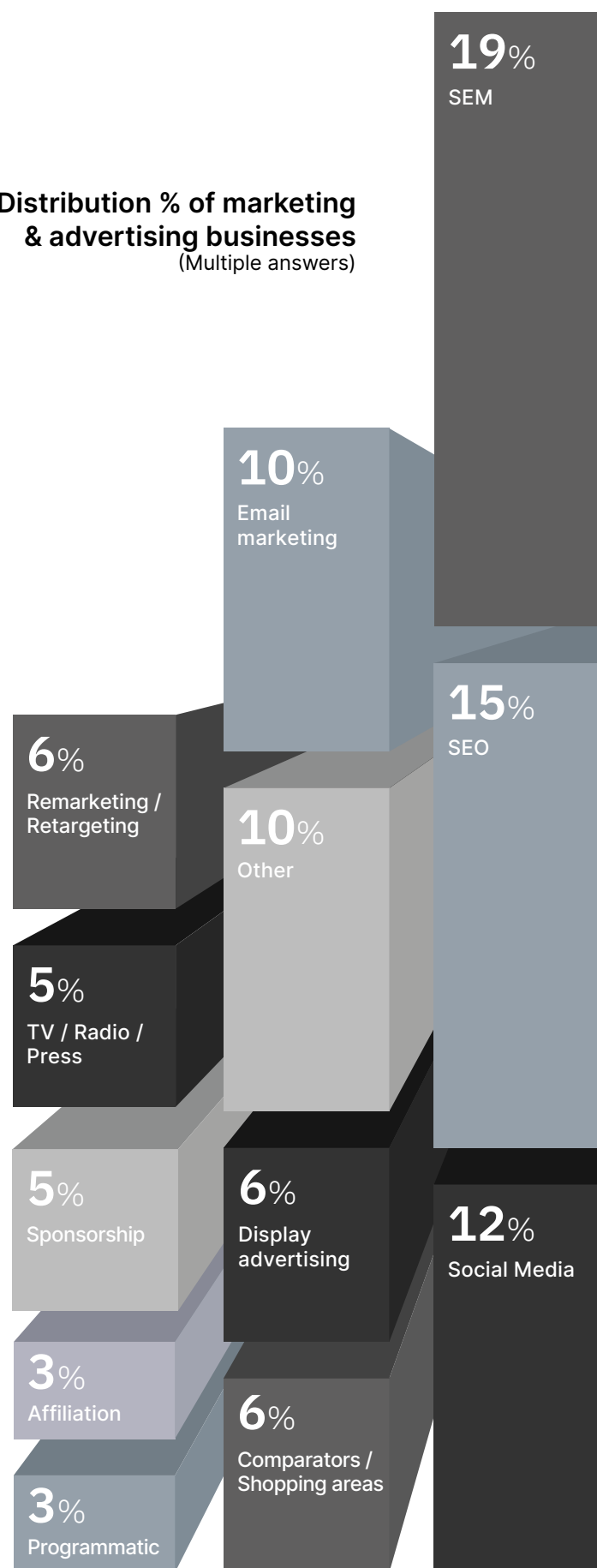
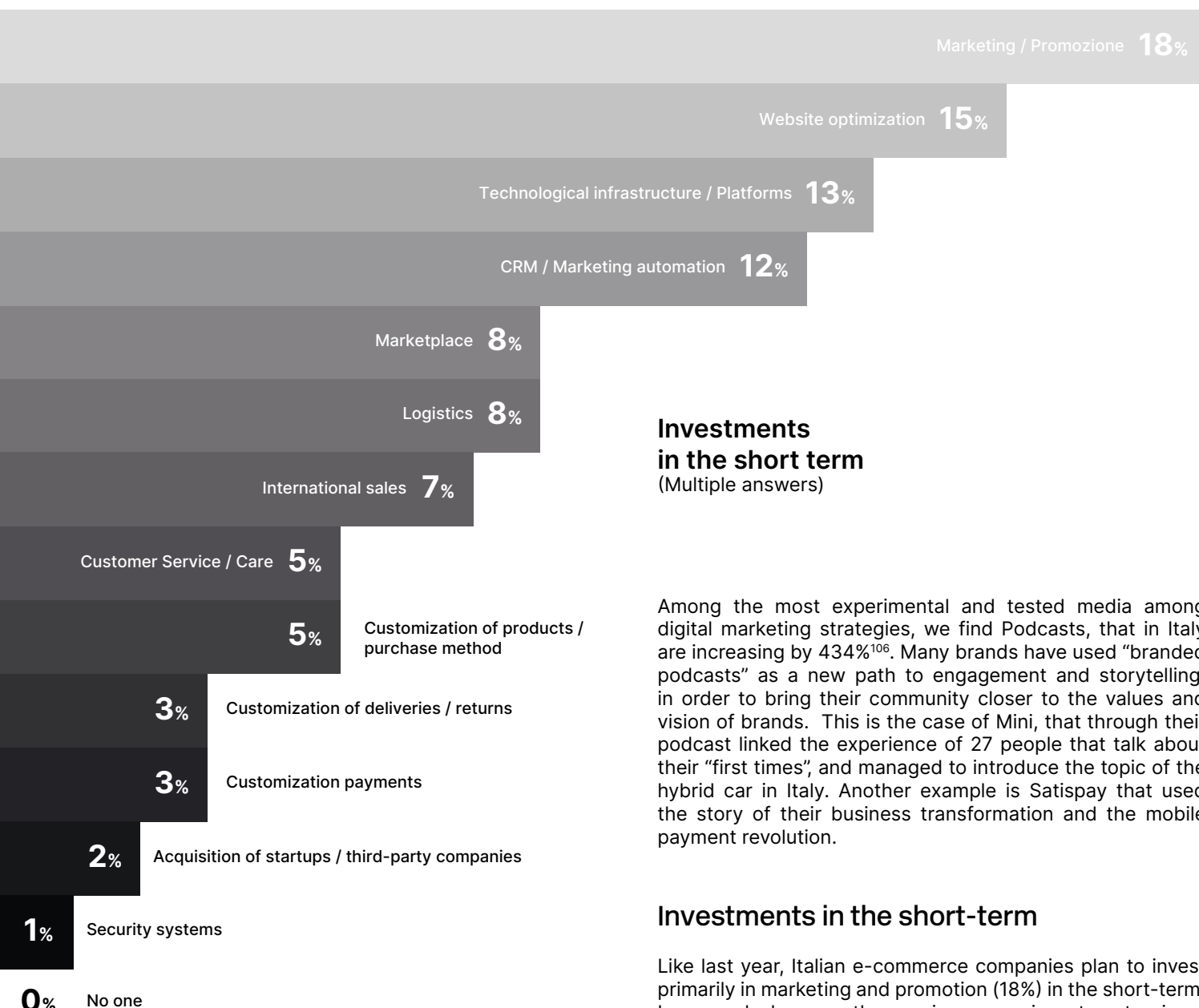


Chart source: Casaleggio Associati, 2021.

95: Criteo - Guida alla pianificazione 2020, Criteo, 2020; **96:** Nielsen: la pubblicità ha chiuso il 2020 a -11%, dicembre a +3,8% con anche i quotidiani in positivo, brand news, 2021; **97:** Traditional & digital advertising in the advertising market in Italy, Statista, 2021; **98:** Spending development in the Search Advertising market in Italy, Statista, 2021; **99:** Desktop & mobile in the Search Advertising market in Italy, Statista, 2021; **100:** Market share in the Search Advertising market in Italy, Statista, 2021; **101:** Customer Relationship Management Software, Statista, 2020; **102:** La fidelizzazione in Italia tra programmi fedeltà e personalizzazione della Customer Experience, Università di Parma, 2020.



Social media still has a fundamental role: more than 22% of the budget on a global level was spent on social networks¹⁰³ and many people say that most of the search has shifted to these channels, getting better results.

Last year some brands, made countertrend choices, such as the London cosmetics brand Lush, which reduced the number of posts in favor of interactions with their users, or Porsche which urged fans to indulge in a "digital detox" and connect with nature¹⁰⁴.

Compared to display advertising, most promotions aim at remarketing, as only 10% of visitors buy an item on their first visit to the website¹⁰⁵.

Investments in the short term (Multiple answers)

Among the most experimental and tested media among digital marketing strategies, we find Podcasts, that in Italy are increasing by 434%¹⁰⁶. Many brands have used "branded podcasts" as a new path to engagement and storytelling, in order to bring their community closer to the values and vision of brands. This is the case of Mini, that through their podcast linked the experience of 27 people that talk about their "first times", and managed to introduce the topic of the hybrid car in Italy. Another example is Satispay that used the story of their business transformation and the mobile payment revolution.

Investments in the short-term

Like last year, Italian e-commerce companies plan to invest primarily in marketing and promotion (18%) in the short-term. In second place, as the previous year, investments aimed at improving website performance, usability, and user-experience (15%), while in third place there are investments aimed at improving the technological infrastructure (13%). The use/optimization of the CRM and marketing automation account for 12% of investments.

The presence on marketplaces and the enhancement of logistics service are expected as investments by 8% of the Italian companies interviewed, while the sales activity abroad by 7% of these companies.

According to the survey, 5% of investments are destined for the placement or enhancement of customer service/care and the personalization of products proposed to the client and/or the purchase methods.

On the other hand, the budget for customization of delivery and return methods, and the expansion and customization of the payment method, and also the acquisition of third-party companies or startups to enhance e-commerce companies and security systems is less than 3%.

Chart source: Casaleggio Associati, 2021.

¹⁰³: Think Forward Italia, WeAreSocial, 2020; ¹⁰⁴: Social media trend 2020: alcune previsioni, Inside Marketing, 2020; ¹⁰⁵: Criteo - Guida alla pianificazione 2020, Criteo, 2020; ¹⁰⁶: Top growing podcast categories during the Coronavirus crisis in Italy 2020, Statista, 2021.

CHAPTER FIVE

Selling abroad

Strategies for presence on foreign markets and turnover

2020 registered a 9.7% total decrease for Italian exports, the worst result since 2009¹⁰⁷. For this year, a growth of 9.3% is expected and it is estimated that digital and e-commerce will play a very important role¹⁰⁸.

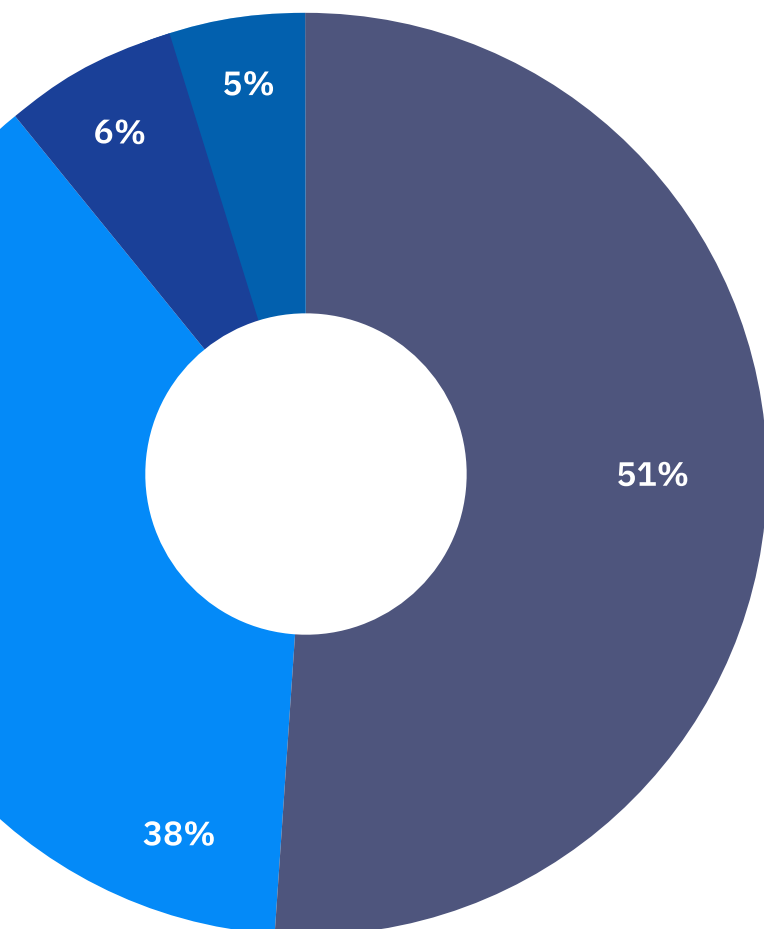
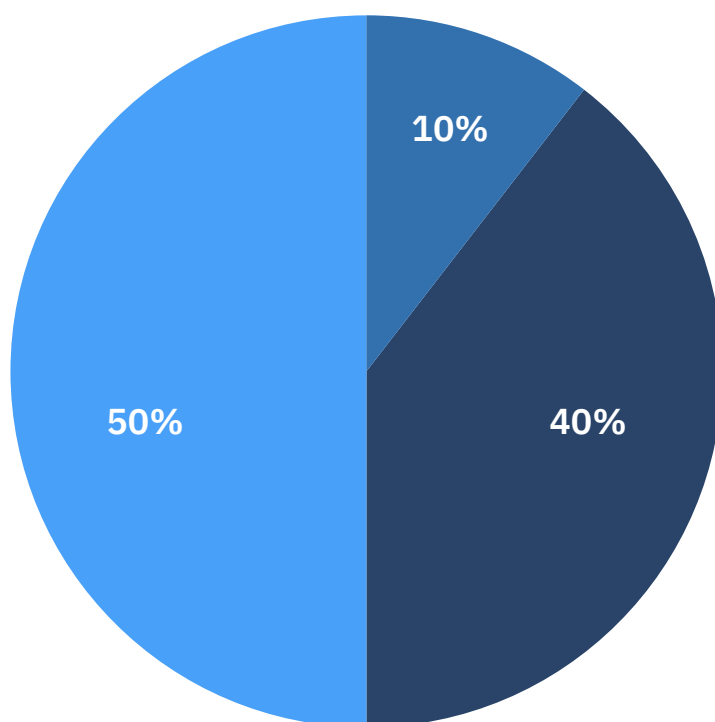
At the end of 2020, Italian e-commerce companies that sold in foreign countries were 49%, while 51% sold only in Italy, compared to 39% from last year.

This depends not so much on the decrease of the companies selling abroad, but on an increase of the players who currently are only in Italy.

External e-commerce sales trend in 2020

(Compared to the previous year)

- Decreased
- Stable
- Increased

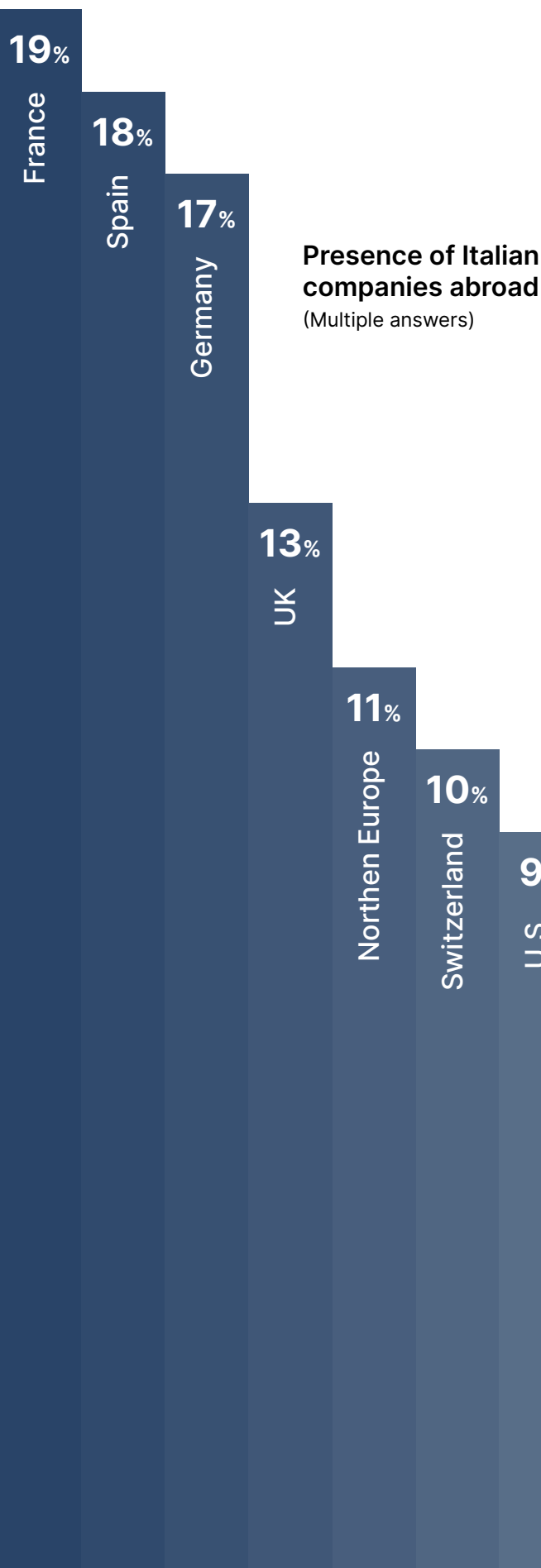


Presence strategies on foreign markets of Italian e-commerce companies

- Sale only in Italy
- Multilingual website
- Sale on marketplaces
- Other

Chart source: Casaleggio Associati, 2021.

¹⁰⁷: Le esportazioni italiane sono diminuite del 9,7% nel 2020, è il calo peggiore dal 2009, AGI, 2021; ¹⁰⁸: Made in Italy, export 2021 verso il +9,3%, Corriere Comunicazioni, 2021.



78% of companies selling abroad have a multilingual website, 12% are available in foreign countries only on the marketplace, 10% answered "Other".

The turnover made abroad represents on average 29% of the total and in 2020 it was reported that sales made abroad increased for 50% of the companies involved in the survey, stable for 40% and decreased for 10%.

Some of the sectors that experienced the highest growth are: Electronics, Food, Fashion, Beauty¹⁰⁹. There are several examples of Italian companies that promote premium Made In Italy products abroad in the food sector, such as the e-commerce PepeGusto from Verona and Emilia Food Love from Emilia. Last year, both brands saw an increase in demand from producers who wanted to sell through their platforms, distributing mainly in Northern European countries with loyalty, attention to the consumer, and high level of delivery/packaging dynamics. The former invested in logistics to offer a punctual service, and the latter used more social media advertising strategies.

Foreign markets with greater presence of Italian companies

There are no major variations in the distribution of sales markets from last year. The Italian companies interviewed are 19% in France, 18% Spain, 17% Germany, 13% UK, 11% Northern Europe, 10% Switzerland. Followed by the USA with 9%, Japan with 4%, Russia and the Balkans with 3%, Asia (other states), China and Africa with 2%, India and Latin America with 1%. 5% sell in other countries.

Chart source: Casaleggio Associati, 2021.

¹⁰⁹: Qapla': l'e-commerce italiano conquista i mercati internazionali, Startup Business, 2021

CHAPTER SIX

Selling on marketplaces

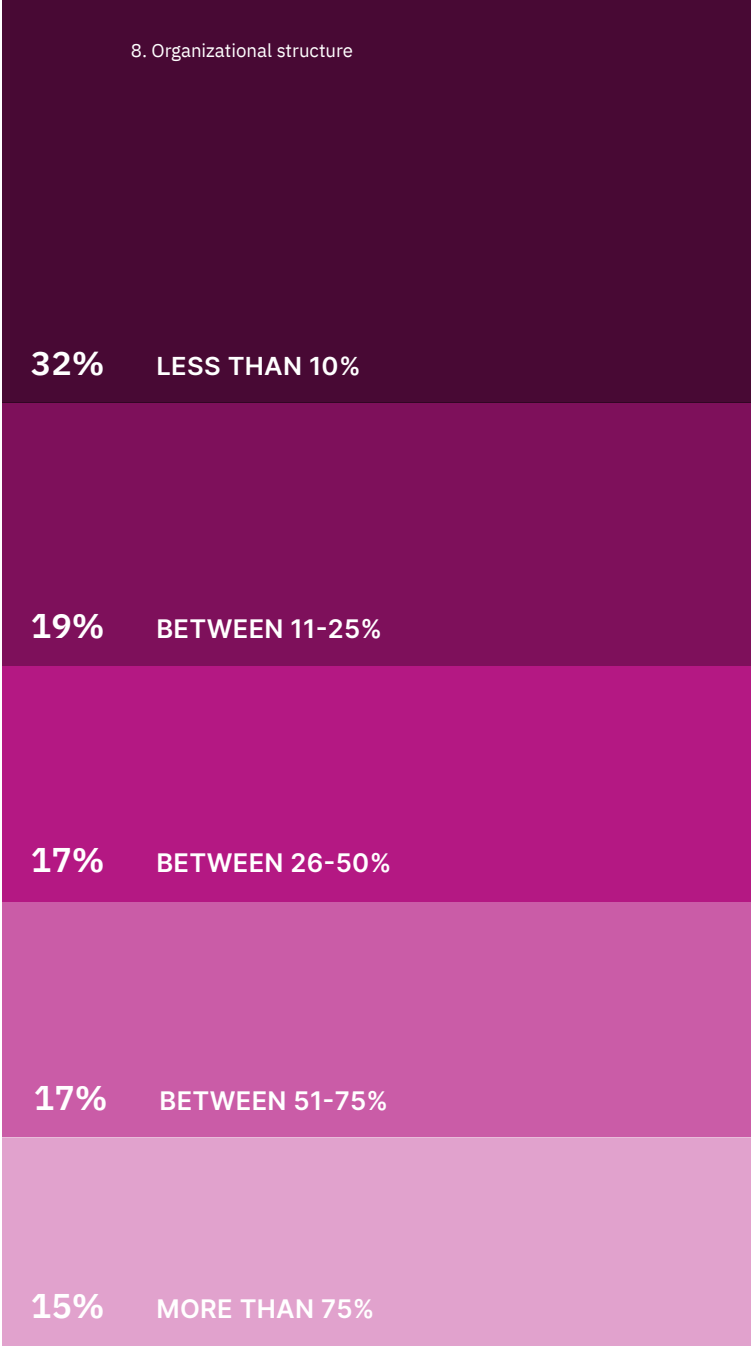
45% of interviewed companies declare to sell on marketplaces, while the remaining 56% does not use these channels.

55% of the companies on marketplaces use from 2 to 5 platforms at the same time and 30% use just one platform.

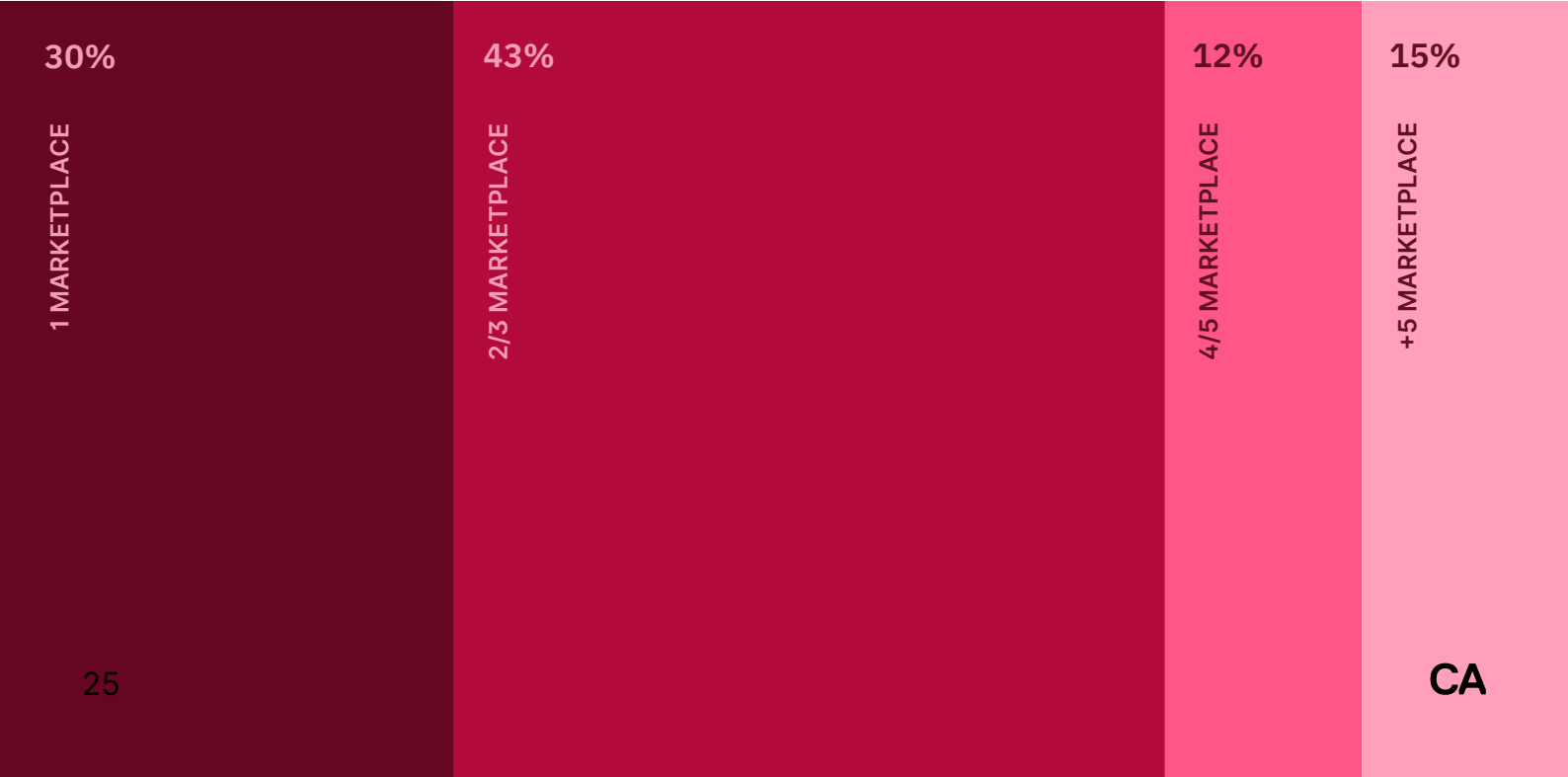
According to 32% of companies selling through marketplaces, they affect the turnover for less than 10%. According to 19% of companies they affect the turnover from 11 to 25%. 17% of companies have an incidence of 26-50% for turnover, and 17% have an incidence from 51 to 75%. 15% have an incidence higher than 75%.

Percentage of online sales generated by marketplaces

Number of marketplaces where they are available



Charts source: Casaleggio Associati, 2021.



38% AMAZON

21% EBAY

21% ALTRO

13% FACEBOOK

3% E-PRICE

2% ALIBABA

2% ZALANDO

Considering this variety, among the most used marketplaces are Amazon (38%), eBay (21%), Facebook Marketplace (13%), ePRICE (3%), Alibaba (2%), Zalando (2%).

The share of “Other” grows. It includes ManoMano, IBS, Privalia and also marketplaces such as the Japal. It is the first Italian platform of “ecommerce as a service” (EaaS) fulfillment for medium-large consumer companies founded in 2018, which last year received a second round of investment of 300 million euro¹¹⁰. Another marketplace, Wish, the marketplace of small “unbranded” producers bases its strategy on the price. Even the Italian Everly, born in 2014, and Supermercato24, a marketplace for online grocery shopping, which in 2020 registered a triple digit growth (+208%) of online purchases compared to the previous year¹¹¹.

In Other there are also “Local Marketplaces”. In fact, with the Pandemic, Italian and worldwide consumers have rediscovered neighborhood shopping digitally or, often, in hybrid mode.

Therefore, many marketplace platforms focusing on geographical areas were born, using proximity logics to provide an e-commerce service to local businesses and shops that are not online. One example is TrevisoNow¹¹², a marketplace in the province of Treviso, which brings together local shops and allows shipments to Italy and Europe (paying by bank transfers or PayPal), while within the province the orders can be delivered to your home or collected at collection points (from shops or other businesses such as bars or agricultural warehouses).

Another example of local marketplace is Driin, a platform that combines the retail stores in Bologna, where you can grocery shop and have it delivered to your house (or chose to pick up in store), with one order and one payment.

Local Marketplace wants to be an alternative to big giants, with the aim of bringing retail commerce online and even using electronic commerce for small traders and artisans who do not have the tools to emerge on their own.

Marketplaces used

(Multiple answers)

Chart source: Casaleggio Associati, 2021.

¹¹⁰: Japal, la piattaforma e-commerce per i brand del largo consumo, incassa round da 300 mila euro, Bebeez, 2020; ¹¹¹: Italiani e spesa online: il secondo Report Annuale di Everli 2020, HoReCa, 2021; ¹¹²: Trevisonow.it, 2020.

Amazon is still the most used marketplace by Italian businesses that want to go digital, make their products known on a large scale, and increase sales through online channels.

Between June 2019 and 2020, it sold 60 million products from Italian retailers (compared to 45 million from the previous period)¹¹³.

Also among these businesses there is handicraft, such as Talento Fiorentino, that uses the marketplace to sell, distribute, and advertise its fine Made in Italy fashion products and accessories; or Omada Design, with its plastic household products, has been able to use the platform to create relationships with customers (through reviews) and offer a timely service integrated with social media.

During the Christmas period, Italian SMEs sold over 20 million products through Marketplaces, with a worldwide turnover growing 59% on an annual basis, compared to the same period in 2019¹¹⁴. The 14,000 Italian SMEs registered on the portal sold on average 100 products per minute with 75,000 euros of transactions¹¹⁵.

Since this year, the Amazon Fresh service has been made available in the provinces of Milan, Turin, and Rome, with same-day grocery and Personal care products delivery.

In December 2020, Amazon invested 16 billion euros to support SMEs sales in crisis due to the Pandemic.

The collaboration between Amazon and ITA (Italian Trade Agency) continues. After 2019, when Amazon supported Italian SMEs in internationalization, offering them a Made in Italy showcase on the platform. In 2020 Accelera con Amazon was born, a training program for SMEs to accelerate the growth and digitization of over 10,000 SMEs through training and coaching sessions¹¹⁶.

The expansion of the giant in Italy does not stop: this year it announced the opening of three new distribution centers in the provinces of Bergamo, Modena, and Novara, reaching a total number of 40 locations throughout Italy, with 9,500 employees.

Amazon is also investing a lot in Partnerships. An interesting partnership is with Illimity Bank: the projects made on the back account, if converted into Amazon vouchers, return 3% more of the value. 15% of the projects created with Illimity Bank were converted into Amazon vouchers with an average value of 200 euro, for a total of 300,000 euros. From this year, the partnership expanded, offering bank customers the opportunity to ask for a loan for their purchases on the marketplace, repayable in 2-6 installments and with advantageous conditions¹¹⁷.

Despite Amazon deciding to prioritize essential products during lockdown in Europe (March to May), last year it increased its portfolio with 1,461 new retailers per day for a total of 115,453 new retailers in a year and 295,000 new

resellers worldwide¹¹⁸. Amazon has opened an air hub directly inside Leipzig-Halle airport in Germany. Thanks to Amazon Air, with two flights per day, Amazon can connect its European warehouses network¹¹⁹.

Also, this year, Black Friday and Cyber Monday have considerably impacted sales, generating 60% more than last year, surpassing 4.8 billion dollars worldwide¹²⁰. The Italian SME's highest selling main product categories are Home and Furniture, Mobile Phones, Games and Beauty, with an average of 106 products sold per minute throughout the Christmas period.

The company's commitment to The Climate Pledge project continues, it commits to become net zero gas emissions. This is why it has become the world's largest buyer of renewable energy. By investing in 26 more projects for wind and solar energy generation, the goal could be achieved by 2025. Among the programs there is also Shipment Zero, aiming to make all shipments net zero carbon, and 50% of shipments carbon neutral already by 2030. This is why the giant has bought 100,000 electric vehicles for deliveries.

To further reduce its environmental impact, Amazon has also introduced "no-rush delivery" in exchange for 1 euro discount on the next order¹²¹.

In 2020, **Alibaba** reached 20 million Buyers, becoming a gateway not only to China but to the international market for Italian companies. In fact, more than 40% of buyers using the platform live in North America, 25% in Europe and the rest are distributed between the Middle East, Latin America, and Asia¹²².

Last year the event Single Day was extended to four days, reaching a record of 498.2 billion yuan (75.1 billion dollars), while in 2019 the value accounted for 38 billion dollars. However, even with this success the Chinese company fell on the stock market, losing 250 billion dollars. This loss was due to the non-listing of Ant, the fintech branch of the giant, due to the lack of requirements¹²³.

However, this year Alibaba has been overcome by Pinduoduo, which connects farmers and distributors with consumers directly through its interactive shopping experience and which has become the largest Chinese e-commerce for active users. In 2020, Pinduoduo declared to have 788.4 million active buyers per year (a 35% increase compared to 2019), more than the 779 million users of the e-commerce giant Alibaba Group Holdings (Amazon has approximately 300 million active users all over the world)¹²⁴.

Regarding Italy, in 2018 already Alibaba created in partnership with ITA, a section dedicated to made in Italy, "hello ita". Last year the Made in Italy Pavilion project began, which aims to create a showcase within the e-commerce dedicated to only 300 Italian suppliers with Premium memberships. This project will also have training courses and dedicated assistance services for 2 years.

113: Per le Pmi italiane boom di vendite su Amazon: 75 mila euro di extra-business pro capite, Corriere Comunicazioni, 2020; **114:** Holiday season Wrap, Amazon Press, 2020; **115:** Per le Pmi italiane boom di vendite su Amazon: 75 mila euro di extra-business pro capite, Corriere Comunicazioni, 2020; **116:** "Accelera con Amazon" in collaborazione con ICE, MIP Politecnico di Milano, CONFAPI e Netcomm per sostenere la digitalizzazione di oltre 10.000 startup e piccole e medie imprese italiane, Amazon Press, 2020; **117:** Illimitybank.com, al via l'acquisto a rate dei buoni Amazon, Corriere Comunicazione, 2020; **118:** Amazon in Europe welcomes 1,461 new sellers per day, Ecommerce News, 2021; **119:** Amazon opens first European air freight center, Ecommerce News, 2020; **120:** Amazon says this year's holiday shopping period has been the biggest in its history, CNBC, 2020; **121:** Amazon diventa il più grande acquirente di energia rinnovabile al mondo, portando avanti l'impegno preso con il Climate Pledge e raggiungere le zero emissioni di CO2 entro il 2040, Amazon, 2020; **122:** Alibaba.com: le PMI nel business mondiale, DYI and garden, 2020; **123:** Alibaba, trionfo di vendite nel Singles' day. Ma è crollo in Borsa, RaiNews, 2020; **124:** Pinduoduo ha superato Alibaba: ora è la più grande società di e-commerce della Cina, Forbes, 2021.

Zalando, the most important European fashion marketplace, has reacted to the health crisis with the project Connected Retail, by waiving the commissions of German and Dutch physical retailers from April to May and anticipating the revenues to a weekly payment to increase liquidity. By accessing the project and linking the physical store to the marketplace, retailers could manage their logistics for free, with packages collected directly at the store¹²⁵.

The company is growing so much that, in contrast to the trend of the period and the sector, it hired 1,000 employees on a permanent basis in the Verona logistics hub¹²⁶. Furthermore, it intensified its distribution network in a partnership with Poste Italiane. From this year, the clients can choose when and where collect their packages, at post offices or at Punto poste lockers¹²⁷.

In the Fashion sector, Secret Sales also increased its turnover 4,000% last year, after the decision to change their business model. In March, just before lockdown, they changed the website, making the offers of the 450 Brand partners accessible to all users, not just to invited users or for a limited time. Within almost a year, it had 18 million unique visitors¹²⁸.

In the last quarter of 2019 **eBay's** turnover was over 7.5 billion dollars, and in the Pandemic year, its turnover dropped to 5.5 billion dollars¹²⁹ despite getting 6 million new active users registered globally between April and May alone¹³⁰. With a total of 350.000 professional retailers, eBay saw this category rise by 40% in March 2020, compared to the same period in 2019. The main sectors where these new retailers operate are: first Home & Garden (28.5%), then Electronics (18.7%) and Clothing (16.1%). The marketplace offered 12 free months for a standard store and 6 free months for a Premium store, as well as free webinars to help retailers go online with no fixed costs¹³¹. For resellers already on the website, it has extended the payment of services to 30 days and has given the possibility of extending the catalog free of charge for one month.

It does not come as a surprise that this year's most sold products were remote working products, such as webcams, headphones, wireless routers, and mobile hotspots, but also leisure products, such as Puzzles, Lego, and video games. The most remarkable data is on personal care products, which grew by 62% compared to the previous year. During March, even DIY products had a surge of +81% in terms of spending volume¹³².

To reduce the environmental impact, with the #EbayDonaPerTe project, the company has recycled unwanted gifts and unused items. For each product with the hashtag in the title, eBay also committed to donate 1 euro to Mosaico Verde, to plant trees.

In the electronics sector, **ePRICE** estimates a negative gross operating margin for the year 2020, while it assumes to break even in 2021, thanks to the changes it is implementing with its 2020-24 business plan. Revenue for the first quarter of 2020 amounted to 24.85 million euros, down by 30%, compared to 35.5 million euros from the same period in 2019. Although the pandemic has led to an increase in visits to the website and sales, unfortunately direct sales were slowed down by the lack of products in stock, due to the difficulties of finding products in stock¹³³.

ManoMano, a marketplace specialized in the home and DIY sector, closed 2020 with a 1.2-billion-euro profit. In Italy only, it had a turnover of 130 million euro. Currently, the website has 50 million unique visitors per month (+70% than 2019) and 7 million active clients (+100%), the offer dedicated to professionals, ManoMano Pro, grew 140%. The French company is optimistic about its growth and, after obtaining 600 partnerships with local retailers, believes it will be hiring 1,000 employees within the year¹³⁴.

The results are certainly due to lockdown, with 79% of Italians spending time gardening and 71% preferring do-it-yourself activities¹³⁵.

125: Zalando's dedicated Connected Retail offering in response to the impact of Coronavirus, Zalando, 2020; **126:** Logistica, la Fiege (Zalando) assume 1000 addetti grazie al boom dell'e-commerce, L'Economia, 2020; **127:** e-commerce, partnership Poste Italiane e Zalando per rafforzare punti ritiro e resi, Key4biz, 2020; **128:** Secret Sales: 4,000% month-on-month revenue growth, Ecommerce News, 2021; **129:** eBay, nell'ultimo trimestre scivolano gli utili e il fatturato, il Messaggero, 2021; **130:** eBay rivede le stime al rialzo: nel Q2 vendite in aumento fino al 26%, Corriere Comunicazioni, 2020; **131:** eBay dona 300.000 euro alla Croce Rossa Italiana e sostiene le imprese italiane, Ebay, 2020; **132:** eBay, oltre 3.000 rivenditori in più a marzo 2020, DIY and garden, 2020; **133:** ePrice, i risultati finanziari. Aggiornato il piano industriale, Soldionline, 2021; **134:** ManoMano: Ricavi 2020 volano oltre 1 mld, fiducia sul 2021, Ansa, 2021; **135:** Sondaggio ManoMano: giardinaggio e fai da te, ecco la chiave della felicità, Affari italiani, 2021.

CHAPTER SEVEN

Social media

2020 saw an upturning of social habits that also clearly influenced people's social behaviors.

More than 180 million people worldwide started using social media between July and September 2020, with an average of almost 2 million new users every day¹³⁶. This channel had a fundamental role for entertainment, information and, mostly, keeping in touch with other people.

Social media, the protagonists of the last years, had a surge in 2020 with 3.23 billion people in the world connected (of which almost 2 billion in the Asia-Pacific area only). In the first months of 2021, the number increased, by exactly +13.2% compared to last year, with 4.2 billion people in the world going online on a social network at least once a month (53.6% of the global population). 28.2% of internet users around the world find new brands thanks to advertising on social media and 24.4% thanks to comments and recommendations on the channels¹³⁷.

In March 2020, in China, a third of its users made purchases through e-commerce live streaming linked to messaging platforms, a method that allows the user to follow the live stream to the webpage of the product. This way is similar to that of tv shopping channels but with a quick and intuitive checkout.

In 2020, in the USA the traffic from social media on e-commerce websites grew by 37.6% with **Facebook** still as the main referral¹³⁸. Worldwide, Facebook is the social media platform with the most users, it has more than 2.7 billion active users with a +12% increase in active users from 2020.

YouTube is in second place of the most used social media, with almost 2.3 billion users and 1 billion videos viewed daily on the platform¹³⁹.

WhatsApp has reached a third of the world's population, with 2 billion active users¹⁴⁰. During 2020, this social worked on its features and optimizations in relation to user privacy. During lockdown it launched Rooms linked to Facebook Messenger to create "virtual rooms" to make video calls with up to 50 people, even if they do not have WhatsApp.

Instagram, with more than 1.2 billion users all over the world was a platform chosen by 60% of companies to increase advertising social investments in 2021, since it allows the brand values to be directly communicated to the consumer. In 2020 the users' most viewed Stories were from Brands accounts¹⁴¹.

TikTok reached 689 million active users in January 2021 and it is the seventh most used social platform in the world¹⁴². The platform is rapidly evolving thanks to a development team, user data, and studies of new social commerce strategies that the company is testing. In 2020 it was the most downloaded app worldwide, with over 2 billion downloads¹⁴³.

The advertising market on these platforms will continue to grow in the upcoming years: in 2020, 93.5 million dollars was spent worldwide (+9% compared to 2019), it is estimated that growth for advertising on social media will return to double-digit growth in 2021 (+13%)¹⁴⁴.

In **Italy** 41 million people (68% of the population) are using social media, with a growth of 5.7% compared to last year. The average time spent on social media by Italians is slightly decreasing, which to date is 1 hour and 52 minutes a day (-5 minutes since last year), compared to a world average of 2 hours and 25 minutes (in line with 2020), almost all accessing from mobile.

YouTube is the most used social by Italians, with a percentage of 85.3%, despite WhatsApp approaching with 85.2%. This is then followed by Facebook, stable with 80.4%, Instagram which rises to 67% and Facebook Messenger which falls to 55.9%.

Twitter and LinkedIn are respectively used by 32.8% (dropping) and 31.2% of users. The growth of TikTok in 2020 should be considered. It went from 11% in 2020 to almost 24% Italian internet users in 2021, and Twitch with 14.6%¹⁴⁵.

Also in Italy, the advertising on social networks is growing, albeit more slowly than world spending. In 2020, the advertising spending on social media in Italy, both from desktop and mobile, reached 904 million euro (compared to 852 in 2019)¹⁴⁶ with Facebook having an 80% market share¹⁴⁷. Regarding their use, it can be noted that social networks are growing as a search channel, that is, as a place to find information about brands and products. Youngest users (under 24) are the target audience that use social networks for this purpose (53.2%), to the detriment of the classic search engine search. On the contrary, the older the users are, the more the social channel loses this type of use (only just above 30% of over 45s use social networks for this purpose, while almost 60% use the Search bar)¹⁴⁸. In Italy, those using social media for this purpose are 33.3%, still under the world average of 44.8%.

136: Digital 2020: october global statshot report, We Are Social and Hootsuite, 2021; **137:** Digital 2021, We Are Social and Hootsuite, 2021; **138:** Social Commerce 2021, eMarketer, 2021; **139:** Digital 2021, We Are Social and Hootsuite, 2021; **140:** Digital 2021, We Are Social and Hootsuite, 2021; **141:** The Most Important Instagram Statistics to Know for 2021, Sprout Social, 2021; **142:** Digital 2021, We Are Social and Hootsuite, 2021; **143:** Top 10 Most Downloaded Apps of 2021 So Far, CyberClick, 2021; **144:** AD spending in the Social Media Advertising market (worldwide), Statista, 2021; **145:** Digital 2021, We Are Social and Hootsuite, 2021; **146:** AD spending in the Social Media Advertising market (Italy), Statista, 2021; **147:** Social Media Advertising, Statista, 2021; **148:** Digital 2021, We Are Social and Hootsuite, 2021;

Social commerce

In 2020, both companies and users pushed more towards social commerce. In the USA sales through social commerce are estimated to be increasing by +34.8% especially for retail products (mostly clothing and accessories), the market is also expanding to other product sectors, such as electronics and house products.

This trend is also spreading in Italy: brands born from social commerce that later established their e-commerce websites, such as Velasca Milano, a brand of handmade men's shoes that started from Instagram (today has 131,000 followers) and now sells all over the world, or Skin First cosmetics, an Italian cosmetics brand founded by a pharmacist/cosmetologist who now has 114,000 followers on IG.

In 2020 Facebook launched Facebook Shop to create online stores for free, to help small and medium-sized businesses during the Covid-19 emergency. Moreover, last year, the social network recorded the highest penetration of users who made a purchase (18.3%)¹⁴⁹.

Instagram, after launching the Checkout feature in the USA, adding Reels and Shop tabs also in the homepage, in December made the social commerce available on all its channels: feed, stories, IGTV, and Live.

Furthermore, in 2021, it is about to launch the Professional Dashboard, available for business accounts, which provides companies with all the tools to develop their community and direct sales.

Shopping on social media is also a way for companies to overcome some obstacles of selling in store: such as fittings or impulse purchases. For example, the social Pinterest is used by 47% of users for features linked to shopping¹⁵⁰, while Instagram can boost the likeliness to buy a product.

Almost half of buyers worldwide (49%) would like to buy directly from live stream - where the brand, celebrity or influencers launch new products - and also in Italy, video is a fundamental means for social commerce since 92.6% of online users in Italy use Internet to watch the video.

In 2020 the difficulty of creating photo and video shoots led to the success of "homemade" content generated by users, and some companies have managed to jump on this trend and make it current. The clothing multinational H&M USA is one example that based its social commerce business directly from the posts created by its users: with the #HMxME campaign. Fans shared their personal style or that of their home, tagging H&M products, and can become part of the brand page, therefore becoming an active part in the social commerce of the brand.

Among the Italian e-commerce companies that launched in 2020 or knew how to better improve social commerce on Instagram there are many beauty companies. Such as Sabbioni, with almost 25 million followers and the hashtag

#sabbionibeauty, it is one of the companies that is increasing investments on social media, supporting a business that was based on door-to-door and in-store relationship with their customers.

Socials are also used to involve the target and the promotion of the loyalty programme. For example, Yumibio, an online organic cosmetics store which sells natural and eco-friendly products on its proprietary site in synergy with social media. The company has a close-knit community attached to the brand's identity and a mission with numerous loyalty activities on social media. For example, The Shopping Night, dedicated to discounts and promotions for members of the "green Family" and weekly promotions dedicated to certain brands. Even GameStop invested a lot on socials and social commerce, by opening its Twitch channel and an Instagram shop. Also, Lego, that in the first six months of 2020 managed to increase its sales by 7%, despite many shops being closed¹⁵¹.

E-commerce platforms are also investing to integrate the e-commerce product catalog with social networks, in order to bring visitors to the website from social networks, especially for new brands that need the research for their products to be sold online easier. The main channels which implement this strategy are mainly Instagram and TikTok. Software that helps companies increase e-commerce conversions through social commerce are multiplying, such as TaggBox Commerce¹⁵² which collects UGC content from users, makes them suitable for social commerce ("shoppable") and connects them to the brand's e-commerce website (as for the HM&ME campaign).

There are also private social commerce platforms such as those proposed by Verint, which provides a forum for sharing experiences and solving problems, capable of increasing consumer loyalty and determining organic conversions.

Italian companies' favourite socials

Italian e-commerce companies still thought Facebook was the most effective social media in 2020. 40% consider it Very effective, compared to 53% from the previous year, while 39% consider it Fairly effective. Among the reasons for this decrease there are the arrival of small new players on the channel, problems of handling a channel without having prior experience as a brand, and the need to get appropriate investments to reach users.

The evidence shows a shift in interest and budget by Italian e-commerce managers towards higher performing social networks such as Instagram, that remained stable last year in the satisfaction index at 40% (reaching Facebook), as the channel that Italian companies were more open to in 2020.

¹⁴⁹: Social commerce 2021 - Brand trends and marketing strategies 2021, Business Insider, 2021; ¹⁵⁰: Why Facebook Provides Scale, but Instagram and Pinterest Offer Relevance for Social Commerce, Emarketer, 2019; ¹⁵¹: Il boom di Lego nonostante la pandemia: vendite in crescita e 120 nuovi store nel 2020, Millionaire, 2020; ¹⁵²: Commerce, Taggbox.com, 2021.

The activities that were evaluated as the highest performing and where investments are made, concern the opening of shops on a platform, integration with e-commerce platforms, advertising and influencer marketing. The latter seems to be a trend for 2021, with small companies investing in micro/nano influencers, carefully recruited in relation to the target, the product, and the creation of engaging and well-made content (useful for small companies that do not have specialists or communication agencies), to generate awareness, acquire new customers, broaden their target, and increase sales.

YouTube lost third place and went down to fifth (from 24% of Very satisfied of 2019 to 10% of 2020) Now WhatsApp Business it is in this place, the social went from 16% of Very satisfied in 2019 to 27% in one year only.

In the scale of effectiveness, according to the Italian companies interviewed, there are LinkedIn, Pinterest, Twitter and WeChat. TikTok and Snapchat are not appreciated by Italian companies, also proving their lack of maturity and knowledge of the channels.

Effectiveness of social media

- Very effective
- Quite effective
- Not very effective

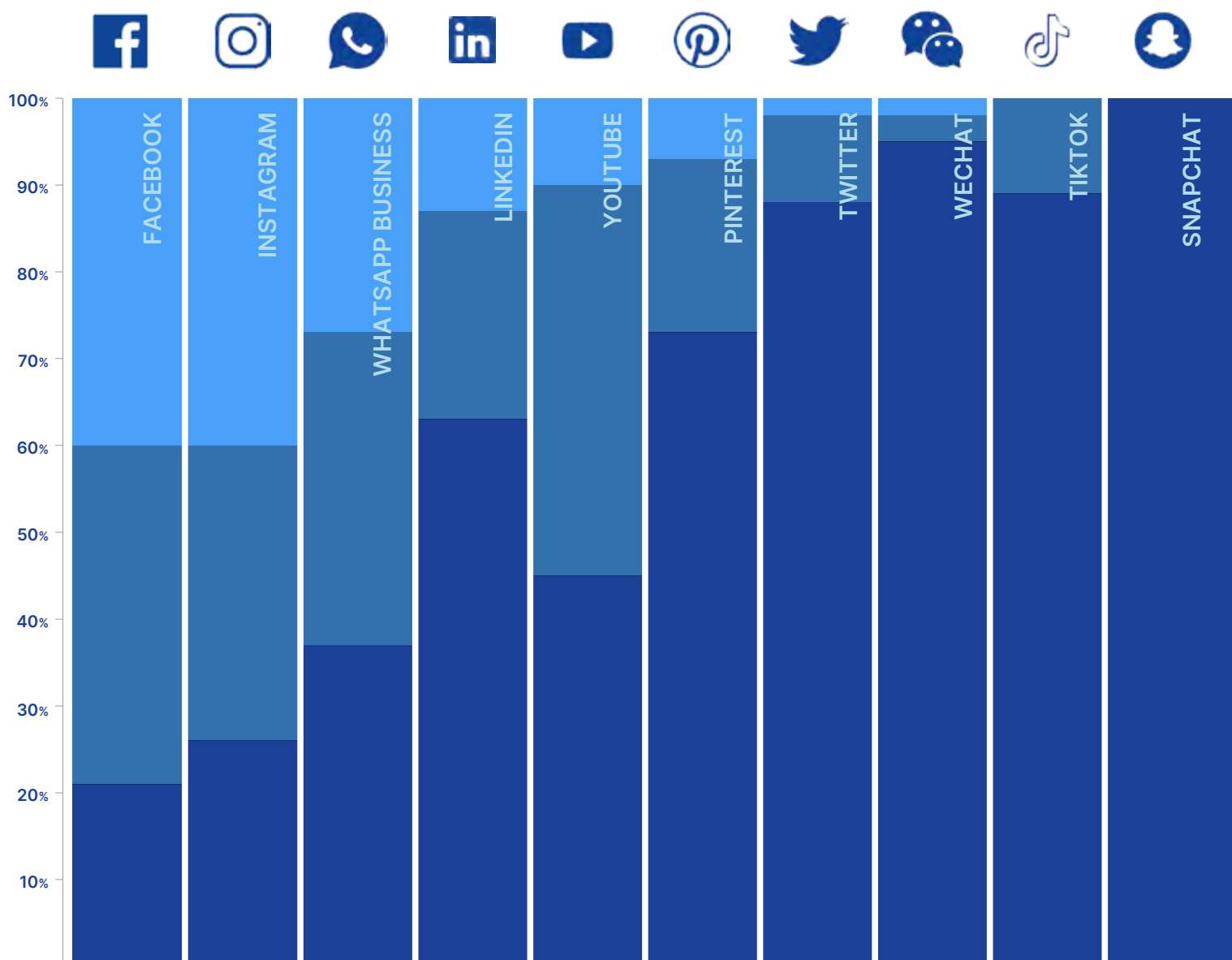


Chart source: Casaleggio Associati, 2021.

Social Media & ROI

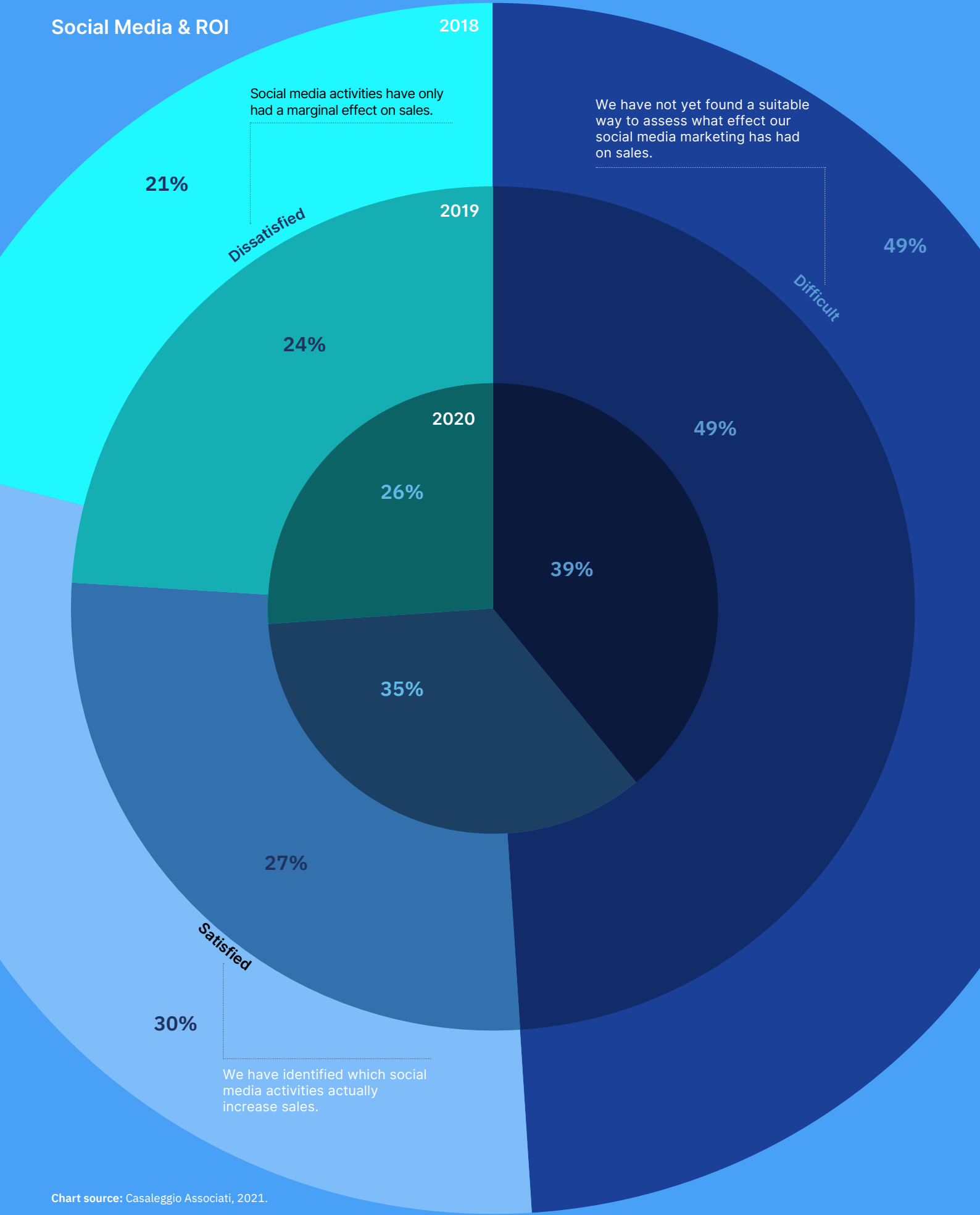


Chart source: Casaleggio Associati, 2021.

Social media and ROI

The perception of the effectiveness of social media in terms of return on investment is still complicated for the Italian e-commerce companies interviewed, but in 2020 more than ever social networks were considered as a truly high performing channel.

The level of satisfaction increases and exceeds the performance of previous years, with 35% of companies having found the right strategies on social media to increase sales (+8% compared to 2019, +5% compared to 2018). However, 39% of companies still declare having not yet found an adequate measurement method to evaluate how social media impact their sales but this percentage is sharply going down compared to previous years, by 10 percentage points. ROI of social activities is still unsatisfactory at 26% (+2%), since for them performances have not yet reached a desired value.

Investments on Social Media in 2021 (Compared to 2020)

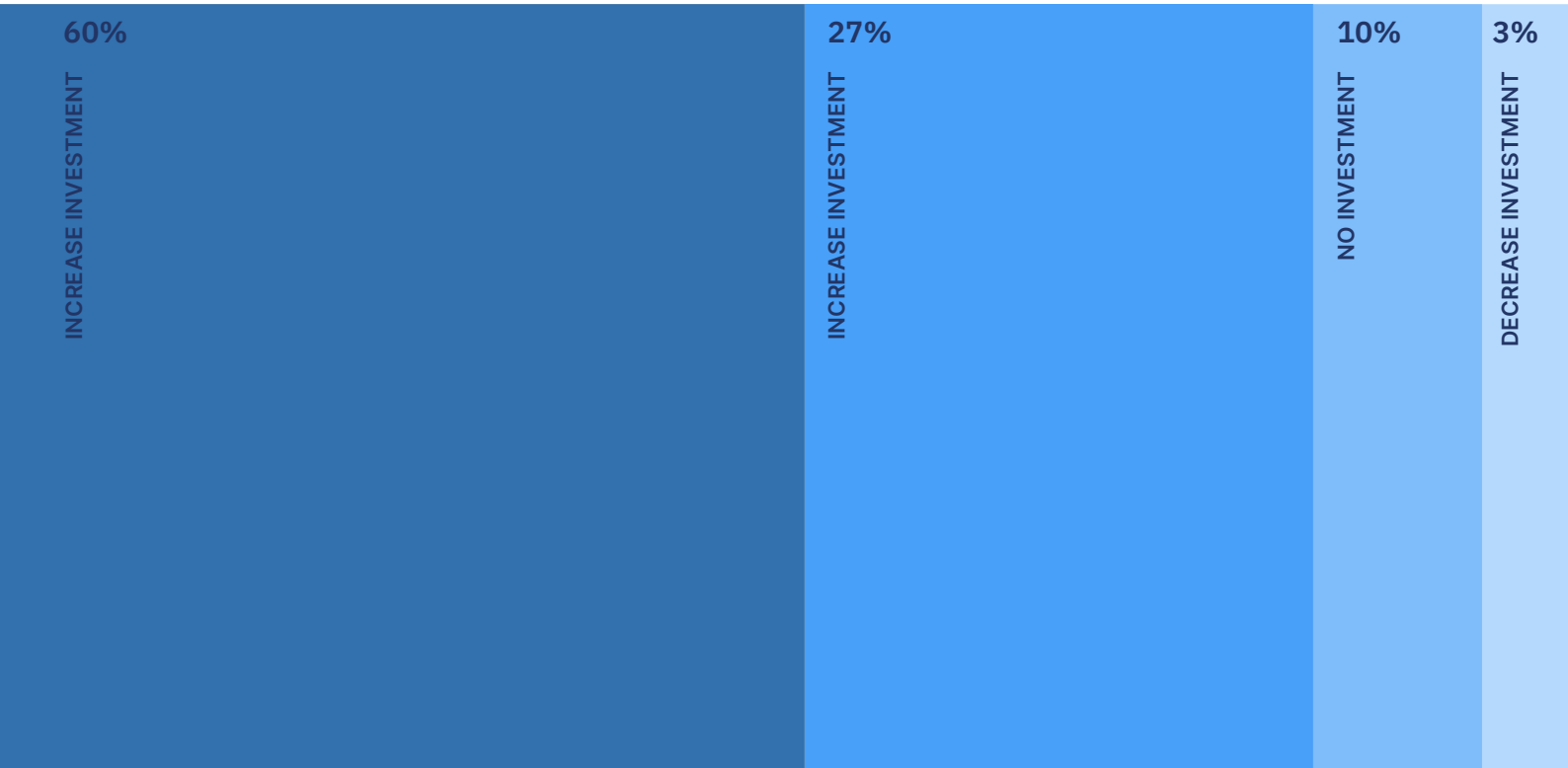


Chart source: Casaleggio Associati, 2021.

CHAPTER EIGHT

Organizational structure

In 2020, the organisational structure of e-commerce impacted sales and the experience of online consumers like never before.

The Italian e-commerce companies interviewed in 2021 underlined the sectors that will have a greater impact this year and which will mainly receive investments: the broadening and optimisation of payment solutions, similar to 2019, are the main strategies (stable at 24%) The investment in organisational services more attentive to sustainability (such as recyclable packaging, energy efficiency-conscious workplaces, green mobility, which are relevant for 20% of e-commerce companies).

While 14% will focus on the improvement of solutions linked to shipping and/or free returns, provided by only 18% of interviewed companies. The commitment to click & collect structures, lockers, and delivery community service solutions (13%) remains stable, for example, Walà where the same people who are part of the community carry out home deliveries.

The broadening of services dedicated to personalized shipments grows to 11%, while the interest in security and data protection measures is decreasing (probably secondary needs in a situation like last year).

The companies interviewed who declared not to follow any precise strategy for organisational structures of their business are fewer and fewer.

Logistics

In Italy there are about 10 thousand companies in the logistics sector, with 85 billion turnover in 2019, 9% of the national GDP. About 90% of them are micro or small businesses, with less than 9 employees and little opportunity to invest heavily in digital transformation¹⁵³.

Despite the growth in e-commerce volumes, and therefore of shipments (+55% in June 2020 compared to 2019¹⁵⁴), the logistics sector had a sharp decline, especially at the beginning of the lockdown, -35%, due to the halting of industrial shipments¹⁵⁵.

Expansion of the organizational structure to increase online sales (Multiple answers)

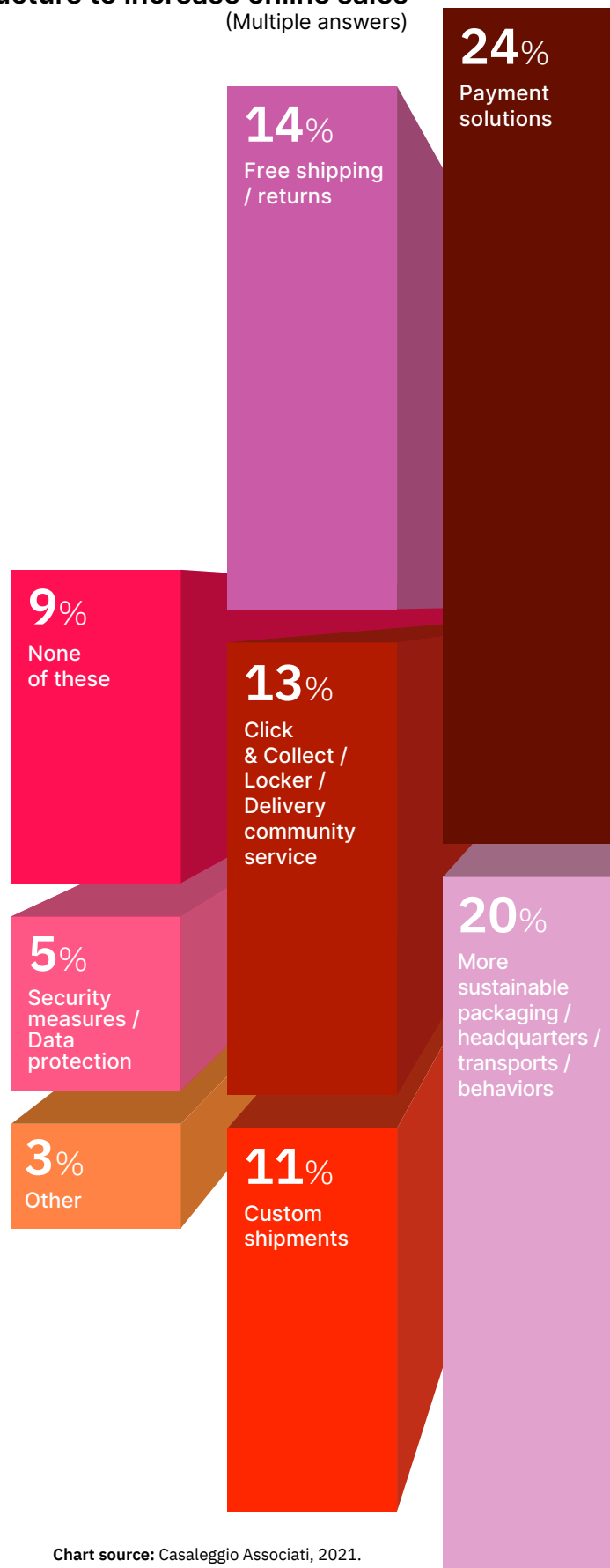


Chart source: Casaleggio Associati, 2021.

¹⁵³: Senza i big, emergono i piccoli, il Sole 24 ore, 2020; ¹⁵⁴: I cambiamenti negli acquisti online, prima e dopo il lockdown: un'analisi sui dati dell'eCommerce, Qapla, 2020; ¹⁵⁵: Logistica e coronavirus: doccia gelata per il trasporto merci, ISPI, 2020.

Shipments generated by e-commerce have increased +103% during lockdown and 68.5% after lockdown, showing that the trend will continue¹⁵⁶: Throughout 2020, supply chain and logistics operators had to deal with large volumes of work related to B2C deliveries and growing expectations from consumers, also contending with the incremental security measures linked to the Pandemic. Operators such as Asendia Italia, observed higher traffic of small packages (+120% compared to the previous year) and consequent growth in turnover linked to the service. Moreover, Italy was the first European country to face the Pandemic, therefore, it acted as the test in managing the organisational structure relating to e-commerce.

Top logistics competitors have seen their activity continue to grow: In 2020 with this in mind, Amazon created 120,000 new jobs in construction and "Amazon Logistics", while UPS opened a new logistics point in Tuscany. At the end of last year, even Poste developed a new "MaxiHub" in Rome, a highly automated logistics facility, capable of handling on average 140,000 parcels per day (the hub in Milan will be launched in spring 2021 and will triple the operator's delivery capacity)¹⁵⁷.

Regarding last mile delivery, among the players who have stood out, there is the Italian PonyU, which manages on-demand and same-day deliveries of the last mile in 27 Italian cities and thanks to its technological nature, was able to manage e-commerce operators' growth in delivery volumes, even unexpected ones. Thanks to the tracking of delivery areas (optimised for means of transport, favouring electric bikes and vehicles), it provides a personalized delivery service, even in less than 60 minutes thanks to the management of the "departure" of the package from the closest shop to the recipient. The service is even customised in the choice of time slots, going up to midnight, and managing returns with the possibility of having a courier that waits 15 minutes for the possible return and then returns with the package. Last year the startup launched the Express platform dedicated to small businesses and privates (without subscription costs but with all customisation services included) as well as big e-commerce players such as Tannico. Together they developed the Tannico Express project to deliver wine within an hour in the Milan area (at their serving temperature and with a choice of 300 labels).

During 2020 and due to the health emergency, the concept of **shipping neutrality**, that is, the idea that logistics and shipping operators offer equal treatment to all e-commerce players, failed.

Many e-commerce players claimed to have received a worse service than that received by the big players. Of course, this reflects on the clients. They received packages from large e-stores to their doorstep on the chosen time and day and at a low cost, while the packages purchased from small stores were often late, with less efficient customer service and often at a higher delivery cost.

The measures adopted include:

- **one-to-one partnership** with smaller local logistics operators aiming for proximity and customisation. Tender is one example, which manages on demand logistics for boutiques and e-commerces in Milan, Florence, and Turin. These are tailored one-to-one deliveries: a "personal style rider" has zero impact and contactless delivery, with the possibility of immediate return and sanitation included. Another example of efficient partnership is UBM (Urban Bike Messenger) that runs last mile deliveries in Milan and Rome, with (professionals) bikers who can carry up to 100 kg per trip;
- **assignment to local e-commerce platforms** for the shipment management of products that otherwise would not have benefited from a digital platform. In 2020, delivery methods specific to each city were born: such as the Cerea online platform, which aims to deliver for shops in the Turin area, with local products, and with delivery within 24 hours of ordering; or Bergamo Smart Shopping, a home delivery service in the city of Bergamo, having the characteristics to challenge large marketplaces;
- **third-party partners** who interact for them, such as the choice of relying on logistics brokers who can negotiate the same treatment given to large e-commerce players for small operators and thus allow them to offer their consumers the same shipping and delivery standards;
- **logistics hubs in the city**, with small sorting spaces for last mile deliveries, also using shops and offices, closed due to health restrictions. Such as Dark Stores of big Fashion companies that transformed their shops into e-commerce warehouses.

¹⁵⁶: e-Commerce in Italia, spedizioni in crescita del 30%, PMI, 2020; ¹⁵⁷: Poste, l'e-commerce spinge la ripresa, Corriere, 2020.

It is easy to imagine how Italian e-commerce companies level of satisfaction regarding shipping services dropped significantly in 2020. In addition to having to find alternative solutions, some operators lost turnover due to logistics operators failing to manage the shipment during the peak of requests.

For these and other reasons, shipping services were rated satisfactory by only 25% of respondents (versus 44% last year); while the share of those thinking that the service can be improved is growing (65% of companies). The number of those thinking about changing provider because of unsatisfactory services increased (10%).

In addition to the above information, among the existing 2020 trends to solve problems related to shipping, there is the internalisation of the company's warehouse task (for 60% of Italian e-commerce), which allows for greater control over stock and shipping, to the detriment of warehouse logistics managed by marketplaces (chosen by 2% of respondents, versus 9% in the previous year).

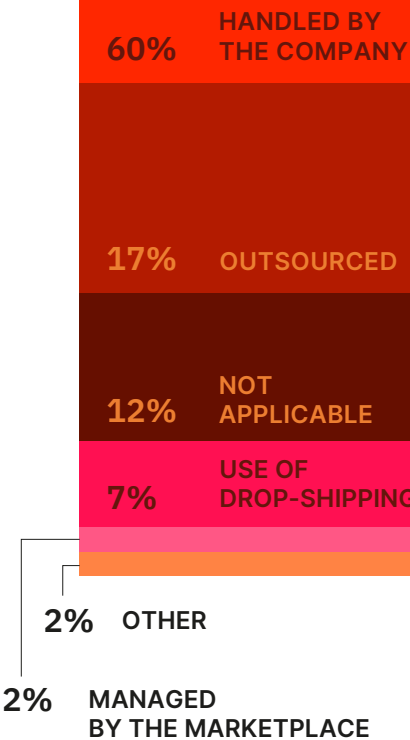
Some have built a winning strategy by using this method, such as the privately managed wine e-commerce *Negozio Del vino*, which grew a lot last year, and made logistics (managed internally by the company) one of its strengths, against its competitors: they have managed the difficulties of the Pandemic by offering a punctual and fast delivery service, recognised by the consumer.

Despite 33% of online purchases in 2020 being shipped using dropshipping (thanks to players such as Oberlo, BigBuy and Yakkyofy, some of the most relevant in Italy¹⁵⁸), this solution decreased its appeal during the year among the e-commerce operators interviewed (for 7%).

17% of companies decided to rely on third-party partners for warehouse management and the choice of adopting alternative solutions to store goods gains a few percentage points, together with the share of those who do not need a warehouse because they sell digital products.

Rating shipping service

Warehouse management



Charts source: Casaleggio Associati, 2021.



158: Yakkyofy: velocizza e semplifica le vendite online, Startupitalia, 2020.

Also in Italy, shipments are adjusting to the trend of **customisation**, offering consumers a shopping experience increasingly linked to their needs and habits and aimed at strengthening their relationship. 49% of e-shoppers think it is important to choose the delivery time of their package and 60% think

it is important to have more delivery places available to collect/receive their package¹⁵⁹. Amazon stepped up: in 2020, in addition to giving clients the possibility of having multiple delivery addresses and pick-up locations to choose from in their accounts, in Italy it also implemented the possibility of choosing the day and time slot for package delivery. There are six time slots during the day, every two hours (from 9:00 to 23:00) from Monday to Friday.

In the third quarter of last year, Zalando increased its turnover +21,6%¹⁶⁰ thanks also to its new partnership with Poste Italiane which allows e-shoppers to collect and return packages at 12,000 authorised Italian post offices and through Punto Poste network (7,300 tobacconists, 200 affiliated shops and 350 lockers).

Another example is the shipping and price comparison platform Truckpooling, which grew by 50% last year, and which gives clients the possibility to customise the delivery: delivery to your floor, choice of pick-up and drop-off points, but above all insurance and the possibility of paying with "Borsino" (a deposit on the account, that can be topped-up and transferred)¹⁶¹.

The acquisitions trend is also present in the logistics and shipping sector. Poste Italiane, for example, in 2020 has increased the customization of tln 2020, Poste Italiane, for example, increased the customisation of the service by acquiring two leading startup in last mile delivery: Milkman and Sennder. These two companies supported the Italian operator in deliveries dedicated to the e-commerce (especially same-day deliveries) also in new sectors such as Food, and in improving GPS tracking systems to provide more accurate estimates to the customer.

Digital payments on e-commerces

In 2020, e-wallets were the most used payment method by e-commerce consumers worldwide, with 44.5% of total transactions and a growth of 6.5% compared to 2019. It is estimated that they will continue to grow as a payment method over the years, reaching 51.7% of e-commerce payment volumes in 2024. Credit cards (22.8% of transactions) and debit cards (12.3%) follow, although a decrease is expected over the next few years, in favour of digital wallets. The pay cash on delivery method (market share of 3.3%) is destined to sharply drop.

Other payment methods that are gaining market share worldwide are deferred payment (buy now/pay later), which is estimated to go from 2.1% share in 2020 (it was 1.6% in 2019) to 4.2% by 2024, and instant bank transfers, which increased in 2020, especially in Europe, reaching 4% market share¹⁶².

The Asia-Pacific area is the most digitalised in reference to digital payments, with China being the driver with a digital payment penetration of 86% of total Internet users¹⁶³. E-wallets are the preferred Chinese payment method (72.1%)¹⁶⁴, with Alipay being the leading operator both for the number of users (1.3 billion) and for total volume of transactions (17 trillion dollars)¹⁶⁵. Credit and debit cards are the main payment methods used in Japan, South Korea and Singapore.

India – which during the Pandemic saw a strong acceleration through the UPI interface, with a total of 2.3 billion transactions¹⁶⁶ and a growth in the volume of transactions of 70% YoY¹⁶⁷ – is currently the first country in the world for payment transactions in real time. Followed by China, South Korea, Thailand and the UK¹⁶⁸.

It should be noted that 2020 was the first year where the penetration of credit card payments in North American area decreased. It still remained the leading method, but lost shares to e-wallet and instalment payments. In the USA digital wallets reached 29.8% (a growth of about 24% compared to the previous year), and the buy now/pay later payments grew 78%.

In Europe, however, digital wallets account for 26.4% of e-commerce transactions, followed by credit and debit cards, both at 19%¹⁶⁹. There are many differences between countries: on the one hand Denmark, Sweden, and Norway (which are expected to become cashless within five years), on the other hand, Germany, Spain, Poland and Italy are even fonder of cash.

¹⁵⁹: Si rafforza l'asse Zalando-Poste: in Italia 20 mila punti ritiro, Corrierecomunicazioni, 2020; ¹⁶⁰: Col coronavirus cresce il fatturato di Zalando, LaStampa, 2020; ¹⁶¹: Truckpooling, la start up delle spedizioni online, cresce del 50%. In arrivo nuovi corrieri e logistiche dedicate all'e-commerce, Radio Senise Centrale, 2020; ¹⁶²: Global Payments Report, Worldpay, 2021; ¹⁶³: China's Mobile Payment Market in 2020; China Internet Watch, 2021; ¹⁶⁴: Global Payments Report, Worldpay, 2021; ¹⁶⁵: Alipay Profile, Trends and Insights – China Internet Watch; China Internet Watch, 2020; ¹⁶⁶: UPI transactions more than doubled in a year to 2.7 bn; Livemint, 2021; ¹⁶⁷: India: UPI usage by platform 2021, Statista, 2021; ¹⁶⁸: India Beats China, US To Become World's #1 In Digital Payments; 71% Of All Payments Will Be Digital! India Beats China, US To Become World's #1 In Digital Payments; 71% Of All Payments Will Be Digital!, Trak.in, 2021; ¹⁶⁹: Global Payments Report, Worldpay, 2021.

There are many e-commerce companies that aim to integrate digital wallets, because they are the most diffusely accepted online payments by new e-shoppers, since they are mobile and respond to the need for security (required by those still reluctant to buy online). One example is ManoMano, who strongly believe in e-wallets to approach new targets and reach offline customers.

In response to the cashless payments trend, in 2020 on a global level, many solutions have been created, often linked to messaging apps.

WeChat launched a test version of Fenfu, a payment method with virtual cards that allows payments to be made in instalments. More than 240 million users have used this feature, consumers who do not own a bank credit cards can thus access online shopping. This payment method increased the conversion rate of e-commerce orders by 14% and the retailers' purchase rate 73%¹⁷⁰.

In November 2020 WhatsApp launched its first payment service in India. After three months, the transactions were worth 1.6 billion dollars¹⁷¹, a smaller number than expected, due to doubts on data privacy and a user interface that does not guarantee a seamless user experience.

Even Telegram is aiming at in-app digital payments, in fact, the platform allows the user to purchase products/services through the internal chatbot. The company partnered with Ecommpay, a payment service provider, to allow users to make in-app purchases and payments by connecting to the merchant's channel bot with a simple "Pay".

Digital payments in e-commerces in Italy

After the approval of the cashless plan in 2019 and aided by the lockdown, there has been an evolution in the payment methods in Italy. E-payments have become the preferred method for 6 people out of 10 (5 out of 10 in 2019). 47% Italians declared they would use credit/debit cards or other cards to pay any amount, no matter how small, versus 40% of 2019¹⁷².

Lockdown determined a growth in online payments that between offline and online are more than a third of total Italian transactions¹⁷³. In 2020, credit cards were the preferred payment method for Italians (44%), followed by prepaid cards and vouchers (40%)¹⁷⁴. Digital wallets are in third place with 34%. Among payment processors, PayPal maintains the lead (65% of the shares), followed by Stripe (23%), while Amazon Pay lags behind (2.5%)¹⁷⁵.

As expected from last year's predictions, instant payments grew and were integrated by companies to increase the one-to-one relationship with the client and create a unique model between physical and digital store. laFeltrinelli, during the Pandemic, introduced the instant payment service for booksellers who offer advice to customers, and who immediately process the sale and payment, also integrating mobile payment systems such as Satispay.

Also, this year, for Italian e-commerce companies, credit cards are the most used payment method and are growing (41%), followed by digital wallets (25%) and bank transfers (15%) which loses points. Payment upon delivery (12%) and payment via mobile (2%) are declining in favour of instalment payment methods (4%).

Digital wallets are still a success in Italy. Among the digital wallets there is Stocard. In 2020, it switched from being a loyalty card wallet to a true payment wallet. In fact, in addition to integrating the cards of over 1000 registered retailers (in all kinds of product categories), last year it introduced the "Pay" function to pay contactless directly from your app with a virtual card (topped up via credit cards and/or bank accounts) to be used both in store and on e-commerce websites.

170: WeChat by Numbers in 2021: Payment, Mini Programs & More, China Internet Watch, 2020; **171:** After three months, WhatsApp Pay not in full play, Economics Times, 2021; **172:** Il piano Cashless convince, 6 su 10 preferiscono le carte ai contanti, YouGov, 2020; **173:** Balzo dei pagamenti digitali in Italia ma il contante resta il mezzo preferito, IlSole24Ore, 2021; **174:** Year-on-year in weeklin online orders in retail industry during the Coronavirus pandemic in selected countries in Europe in 2020, Statista, 2020; **175:** Online payments by type in Italy, Statista, 2020.

Payment methods used

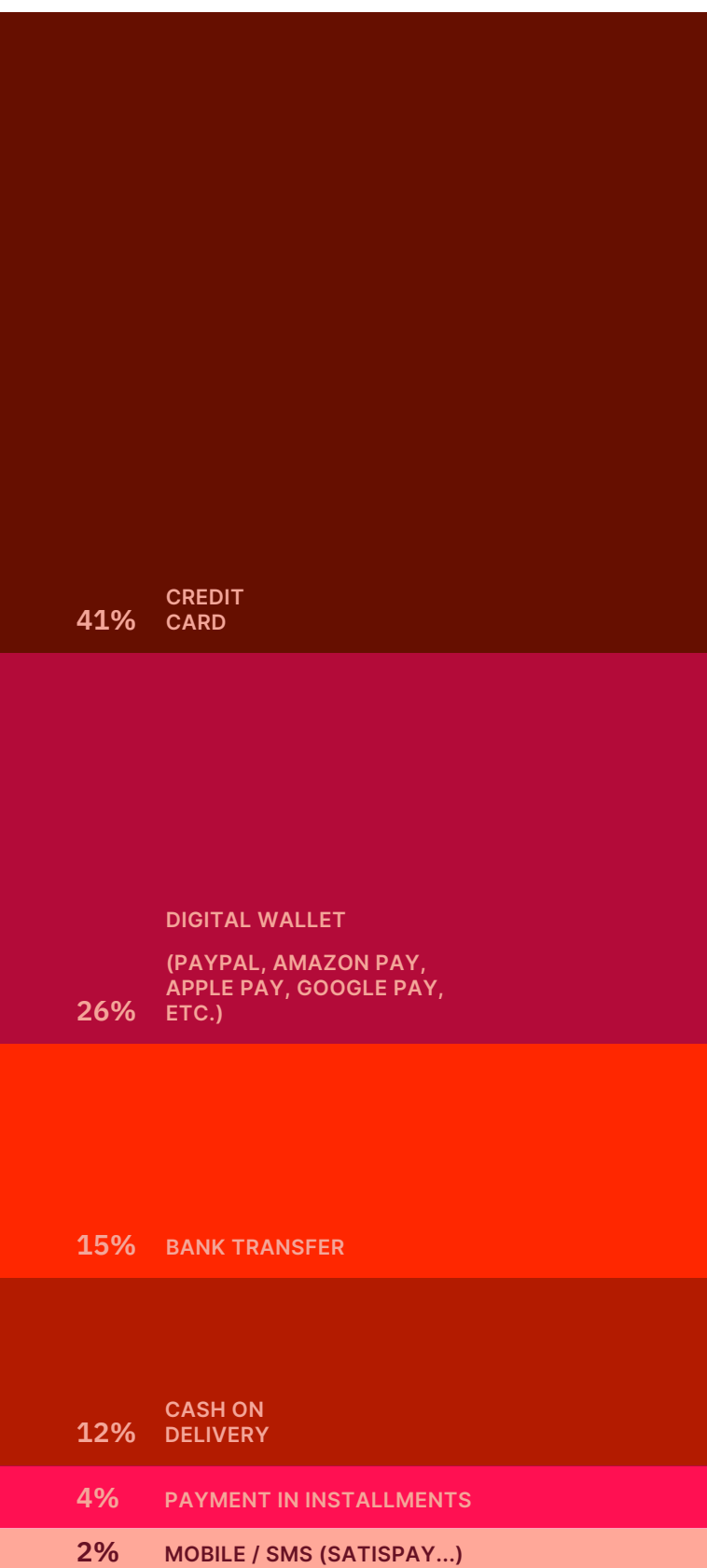


Chart source: Casaleggio Associati, 2021.

The big news OD 2020 in Italy was the category of **instalment payments** that follow the global trend of Buy now/Pay later. This online payment method, even if it sometimes has higher commissions for companies, gives several advantages that justify its diffusion, including: an increase in the average cart, a growth in conversions because it is easy to use for the customer, a higher frequency of orders and the approach to a younger consumer target who can thus access purchases, even for small amounts (it is in fact not unusual that amounts of around 15 euros are split).

Together with Soisy, Scalapay and Amazon, there are many operators that have entered in the Italian market of instalments for online shopping. Among these, the Clearpay solution has recently launched in Italy. It allows the customer to pay in 4 instalments, without any additional fee (with payments every 15 days).

Klarna, the Swedish online shopping start-up has taken hold in Italy with the "pay in 3 instalments" solution (with a payment every thirty days). The company, leader in Buy Now/Pay later payments, with 250,000 retailers and 90 million customers worldwide¹⁷⁶, is also having great success in Italy. Fintech has established its third technological hub in Milan and last year acquired Moneymour, a payment start-up that provides immediate loans for online purchases.

Klarna is creating customised partnerships, with the aim of creating services to support the consumer, such as the one with Samsung Italia which introduced the possibility for the customer to pay in instalments even after-sales services (such as out of warranty repairs): a service that meets the needs of consumers, in a time of financial difficulty due to the Pandemic.

Among **alternative solutions**, last year the payment app Satispay (with over 1.4 million users and around 140,000 retailers in Italy) saw an increase in the use of payment services linked to the health emergency, such as the online payment of car tax that grew by 110% compared to last year, precisely because of the need to avoid going to physical locations to pay¹⁷⁷. More importantly, it activated the service "Order and Collect" that allowed the retailers lacking an e-commerce system to receive the payment for the order and collect it at the store in a cashless mode.

¹⁷⁶: Is Klarna legit?, Qz, 2021; ¹⁷⁷: Satispay, maggior utilizzo dei servizi digitali di pagamento nel 2020, Tomshw, 2021.

Organizations interviewed

We thank all the companies that actively participated in the realisation of this study, in particular:

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E-commerce Ranking

The E-commerce Ranking is the ranking of the 100 most popular e-commerce websites in Italy.

The ranking is based on estimates of data available online, has no statistical value but is indicative of the power relationships existing between the various players.

In addition to the estimate of unique visitors per month, the time on the website, the bounce rate and the estimate of the relevance of the brand, are considered. Twice a year an update is made based on the changes that have occurred (naming, url, aggregations or other). The companies in the ranking are selected on the basis of estimates of turnover for the previous year and site traffic.

You can report your company for inclusion in the ranking or participation in Casaleggio Associati annual research.

The ranking of the 100 most popular e-commerce website in Italy

Pos.	Azienda	Settore	Rilevanza	Visitatori	Tempo medio	Frequenza di rimbalzo
→ 1	Amazon	Centri Commerciali	1.000	66.003.435	12:40	35,0%
→ 2	eBay	Centri Commerciali	481	31.745.410	10:35	32,4%
→ 3	Zalando	Moda	161	10.617.674	10:06	38,0%
→ 4	Mediaworld	Elettronica	155	10.192.156	08:17	46,8%
→ 5	Ikea	Casa	138	9.094.211	10:53	34,7%
→ 6	UniEuro	Elettronica	130	8.521.991	09:04	58,0%
→ 7	Leroy Merlin	Tempo Libero	124	8.168.873	08:41	57,3%
→ 8	ManoMano	Centri Commerciali	121	7.934.291	07:21	51,4%
→ 9	Microsoft	Elettronica	109	7.176.222	06:41	60,1%
→ 10	Apple Store	Elettronica	99	6.499.657	06:21	58,0%

Casaleggio Associati, April 1, 2021.

[See the complete ranking](#)

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deliveries in 30 minutes



Next
scheduled deliveries



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PARTNERS

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7

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manage, also with no technology
knowings.

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marketplaces.

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coupons, gift cards, abandoned cart,
Scheduler Pro.

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