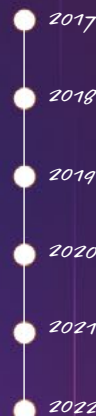


## e-commerce Italia



→ CLASSIFICA ECOMMERCE  
ITALIA 2023



- ECOMMERCE
- SOCIAL MEDIA
- ADVERTISING
- MARKETING ONLINE
- MARKETPLACE
- AWARDS

# Ecommerce in Italy 2023

# CA

**Intellectual Property:**

Casaleggio Associati

Digital Thinking

[www.casaleggio.it](http://www.casaleggio.it)

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# e-commerce Italia

by Casaleggio Associati



Is the Casaleggio Associati project born in 2022, thanks to a 17-year experience in the Ecommerce study. A brand that brings together research, events, initiatives and rankings.



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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.

# Casaleggio Associati

## We conceive and implement digital transformation projects

Business transformation has never been so quick and requires a medium to long-term strategy: we must set priorities, assess the feasibility, proceed with implementation and evaluate the return on investment. For these reasons, a solid strategy presupposes an overall vision in which business models, the digital ecosystem, advertising and digital relations with customers are jointly analysed as a unit.

**Digital Thinking** is the first value that we can pass on to our clients.

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We analyse market changes and changing needs, provide new insights and trends and compare them with international dynamics.

## Our Services

Our in-depth analysis ability and many years of experience in numerous market sectors enable us to act as a solid, reliable partner for companies wanting to incorporate innovation into their business models.

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### → Digital Strategy & Innovation

- Strategy Design
- Rethinking Business Model
- Blockchain & NFT Strategy
- Roadmap to Smart Company

### → Digital communication

- Brand Positioning & Reputation
- Digital Marketing Strategy
- Content Strategy
- Community accelerator

### → Research, Education & Digital Thinking

- Vertical studies and research
- Observatories on digital world
- Corporate trainings
- Speech

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Hey, do you have this tshirt in pink too?

11:58 ✓✓

I don't know the word "tshirt".

11:59

Do you have this t-shirt in ornage?

11:59 ✓✓

I don't know the word "ornage".

12:01

No, god, ORANGE!

12:01 ✓✓

I don't know the word "god"

12:03



**STAY HUMAN.  
STAY CONNECTED.**

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**charles**

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# Introduction

## The opinion

2022 was the year of the reality check for retailers and manufacturers who had to go back to playing by the rules of the market without the boost (and in some cases the obstacle) of lockdown.

The real novelty was the inflation that Italian Ecommerce had not yet experienced in its entire life. On the one hand, it affected purchases due to increased prices, uncertainty

caused by the energy crisis, the ongoing war and the soaring costs of transport from Asia; on the other hand, it allowed sectors such as Consumer Elec-

tronics, Food and Home and Furnishing, which decreased sales in absolute terms, to increase their year-end turnover anyway.

Operators have nevertheless taken the opportunity to reorganise production and make discounts less structural, and also expect double-digit growth of 17.26% on average for 2023.

Growth will travel through differentiated channels because on the one hand, operators who can still finance

growth at a loss are fewer and fewer given the ECB's rate increase, and on the other hand financially sustainable growth is often not enough to keep up with foreign operators entering Italy.

The transport crisis from China has made many operators think about moving production closer to Europe, but Asian manufacturers are already structured to compete directly with manufacturers and retailers who outsource production to them. In 2023 these giants will start selling directly to final customers via marketplaces such as Amazon, following the example of Shein, which has already surpassed multinationals such as Zara and H&M in terms of notoriety and in some cases turnover by focusing everything on the speed of production and daily renewal of the catalogue.

Competition will also come from Europe, as trail transport will be further liberalised.

To defend against these phenomena, Italian retailers will have to strengthen their relationship with the final customer.

The relationship with the final customer, however, could be intermediated directly by artificial intelligence objects that will most likely forever change Ecommerce as we have known it until now.



## CHAPTER ONE

# Ecommerce condition

Over  
**64%**  
of the global population  
uses the Internet

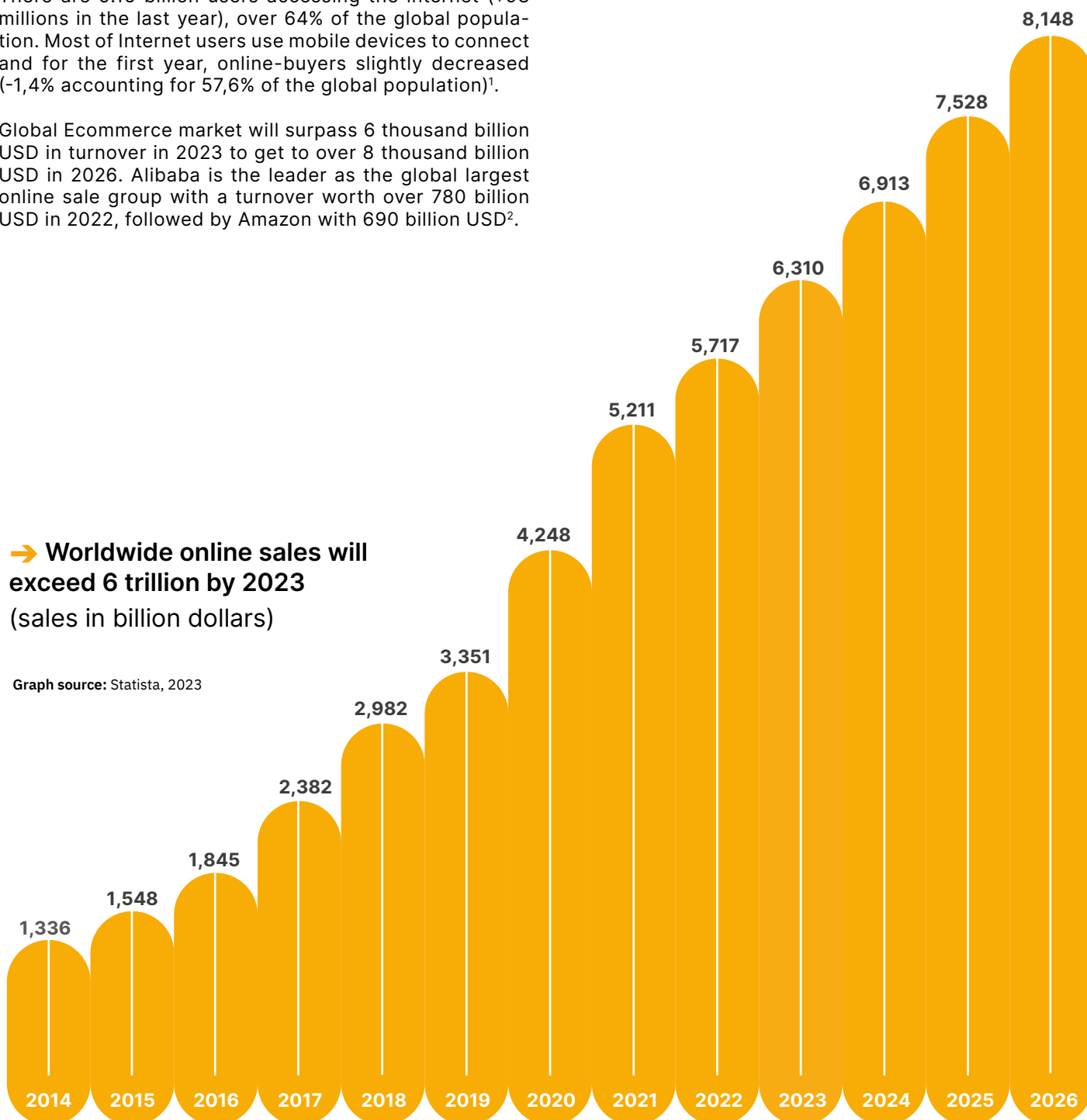
## Ecommerce in the world

There are 5.16 billion users accessing the internet (+98 millions in the last year), over 64% of the global population. Most of Internet users use mobile devices to connect and for the first year, online-buyers slightly decreased (-1,4% accounting for 57,6% of the global population)<sup>1</sup>.

Global Ecommerce market will surpass 6 thousand billion USD in turnover in 2023 to get to over 8 thousand billion USD in 2026. Alibaba is the leader as the global largest online sale group with a turnover worth over 780 billion USD in 2022, followed by Amazon with 690 billion USD<sup>2</sup>.

→ Worldwide online sales will exceed 6 trillion by 2023  
(sales in billion dollars)

Graph source: Statista, 2023

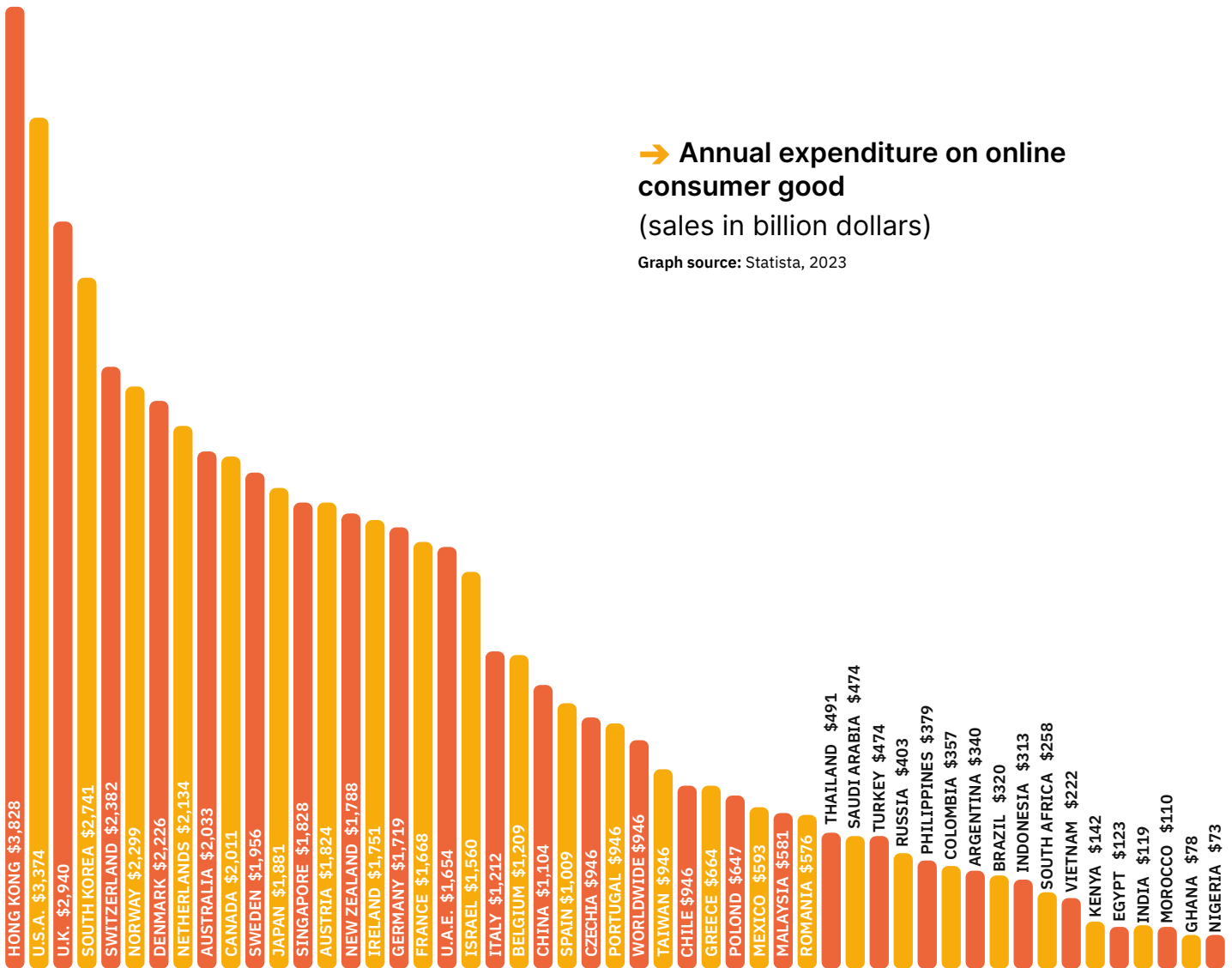


1: DIGITALE NEL MONDO, Datareportal, 2023; 2: Statista, 2023.

On average, mobile accounts for 59.79% of global traffic, while 38.53% comes from desktops and 2.05% from tablets<sup>3</sup>. While in Europe and North America the percentages between desktop and mobile are more or less equal, in Africa (77% mobile) and Asia (70% mobile) mobile has become the main channel for online connections.

Mobile represents  
**59,79%**  
of global traffic

Among the most purchased consumer goods online in the world in 2022, Fashion stands out, followed by Consumer Electronics. What was, however, a particular phenomenon last year was that almost all the main categories of consumer goods purchased online saw a contraction with the exception of Food, which joined Services where Tourism in particular saw significant growth<sup>4</sup>. The readjustment of the momentum towards the Net that came with lockdown is also seen in the overall time people spend online, which dropped by 5%<sup>5</sup>.



3: Desktop vs Mobile vs Tablet Market Share Worldwide, Statcounter, 2023; 4: Statista Digital Market Outlook, 2023; 5: GWI, 2023.

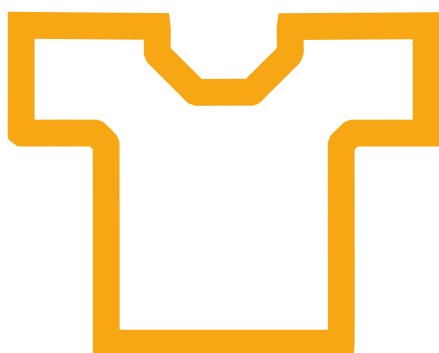
→ The main categories of online consumer goods worldwide saw a decline in 2022

(values in billion dollars)

Graph source: Statista, 2023

## FASHION

\$871,2



↘ -2.4% (-\$21)

## ELECTRONICS

\$765,7



↘ -17.1% (-\$158)

## GAMES, HOBBY, DIY

\$601,7



↘ -2.7% (-\$17)

## FURNITURE

\$387,7



↘ -12.3% (-\$54)

## PERSONAL AND HOUSEHOLD CARE

\$368,2



↘ -1.7% (-\$6,3)



## FOOD

\$244,0

↗ +6.9% (+\$16)



## DRINKS

\$207,9

↗ +0.5% (+\$1,1)



## PHYSICAL MEDIA

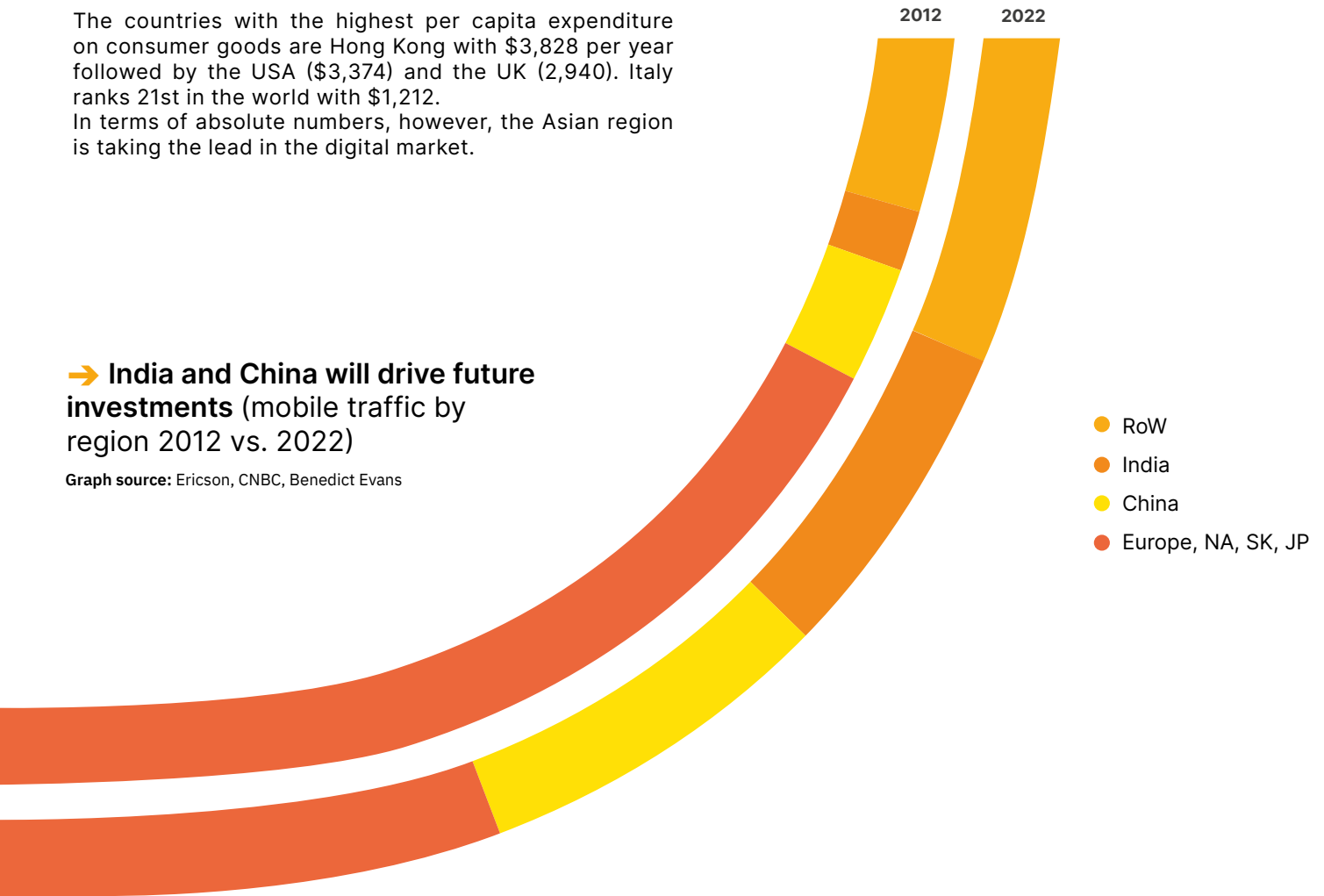
\$143,8

↘ -7,2% (-\$11)

The countries with the highest per capita expenditure on consumer goods are Hong Kong with \$3,828 per year followed by the USA (\$3,374) and the UK (2,940). Italy ranks 21st in the world with \$1,212. In terms of absolute numbers, however, the Asian region is taking the lead in the digital market.

→ **India and China will drive future investments** (mobile traffic by region 2012 vs. 2022)

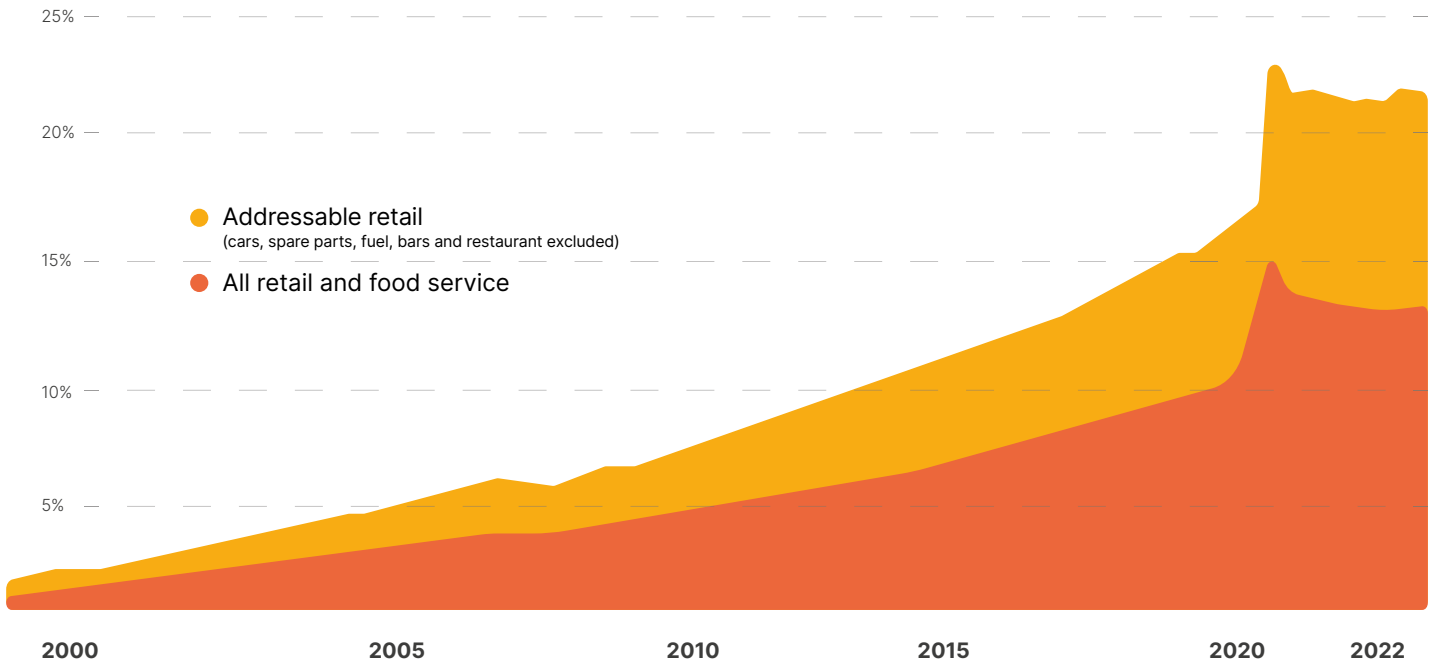
Graph source: Ericson, CNBC, Benedict Evans



The Asia-Pacific region continues to drive the market. However, growth continues in all markets. In the US, after the lockdown peak, the growth has returned to the historical curve of physical retail where, nevertheless, 1 in 5 purchases are made online.

→ **Ecommerce as % of retail revenues in the US**

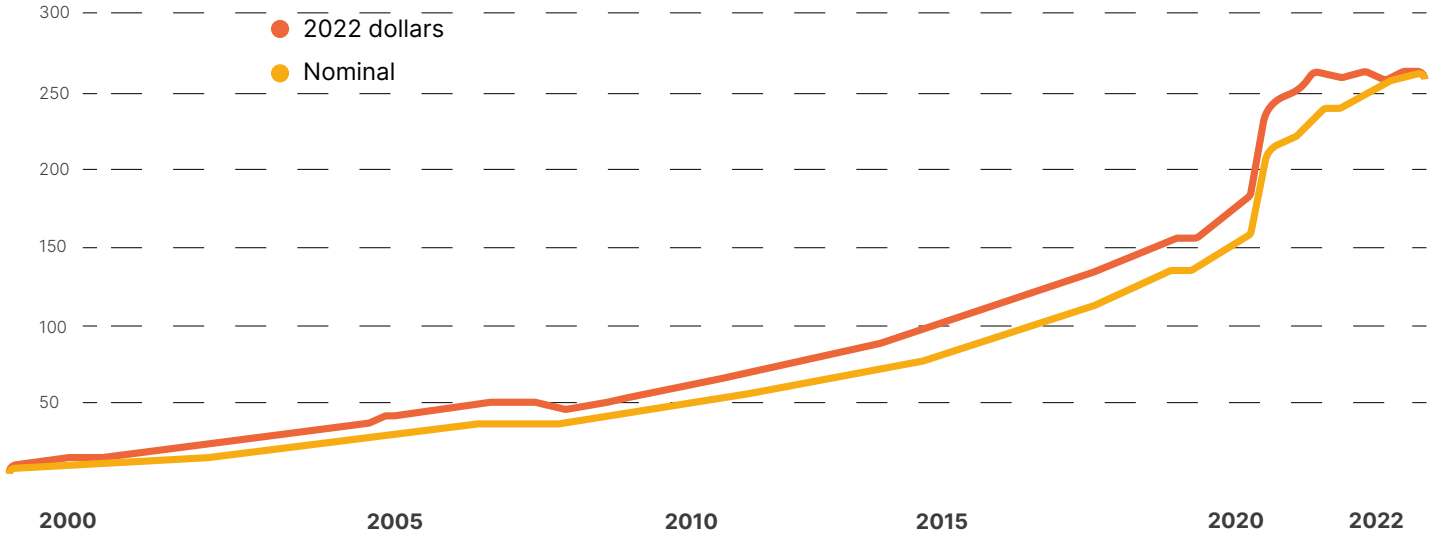
Graph source: US Census, Benedict Evans



From the point of view of overall turnover, US sales still grew in 2022; this growth in sales is essentially due to price growth. In real terms (number of units and services sold), in fact, the last year saw a slight decrease, partly absorbing the strong lockdown boost.

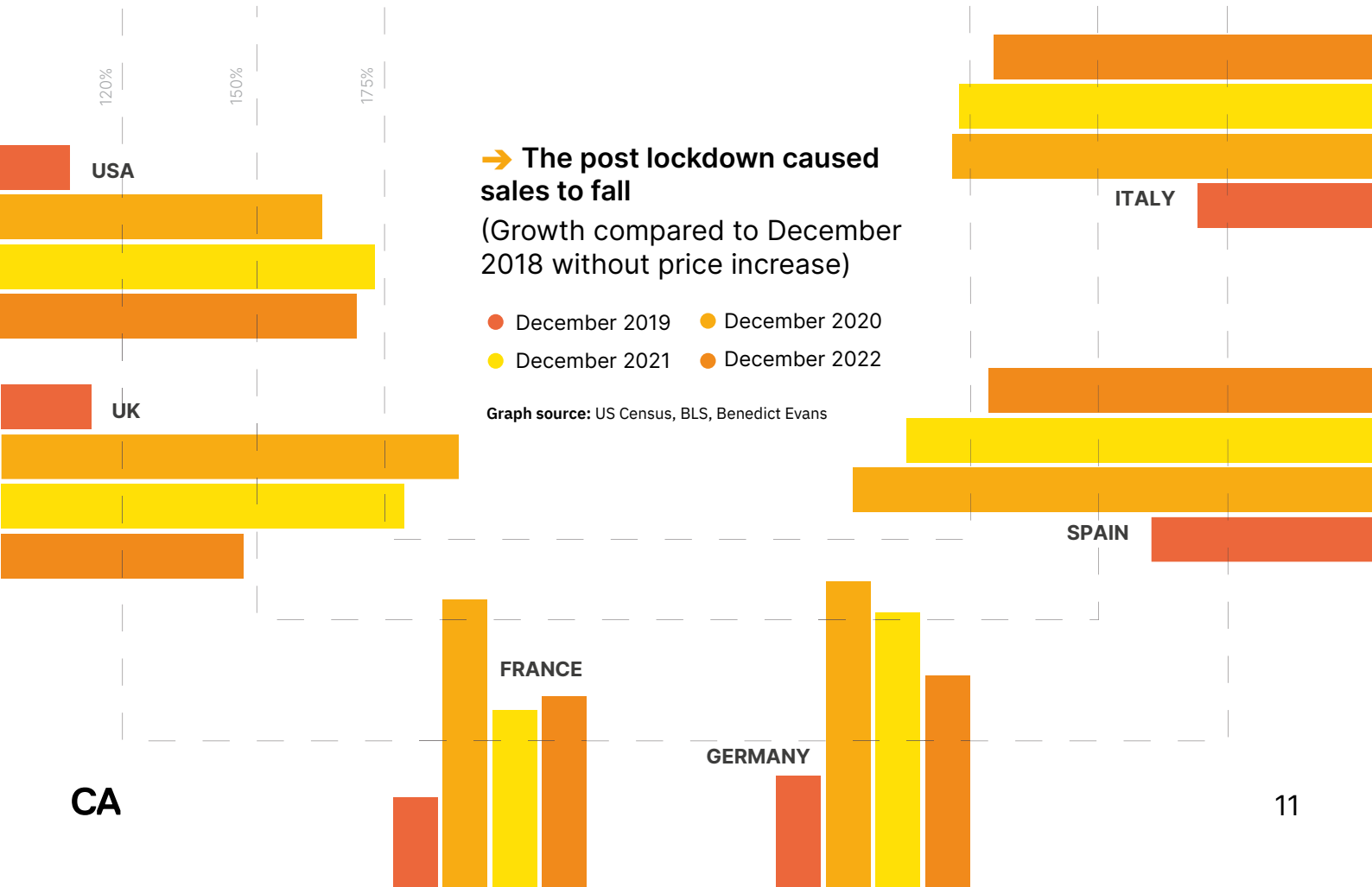
➔ **Online sales revenue in the USA**  
(values in billions of dollars)

Graph source: US Census, BLS, Benedict Evans



Worldwide, the growth of lockdown saw a three/four-year growth in one. However, this strong growth also generated a lock-in effect due to those who were forced to buy online, but preferred to buy in-store. Looking at the

individual Countries, all saw a contraction in real terms in 2022. The only European exception is France, which already saw its decline in 2021.



➔ **The post lockdown caused sales to fall**  
(Growth compared to December 2018 without price increase)

- December 2019
- December 2020
- December 2021
- December 2022

Graph source: US Census, BLS, Benedict Evans

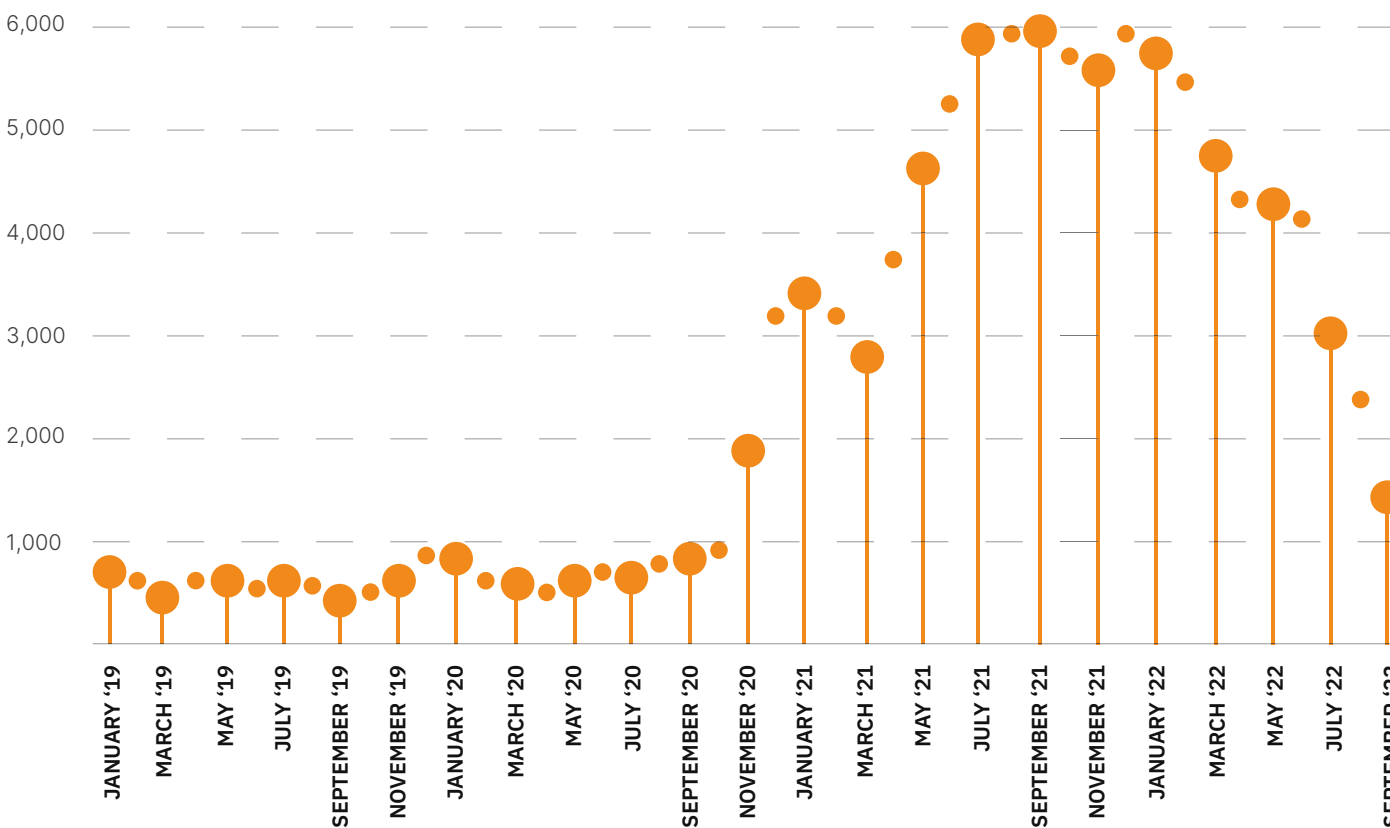
The cost of shipping is

# decreasing

The drop in sales resulted from several factors: mainly from a recovery of the too-abrupt growth of the last two years, the economic crisis aggravated by the energy emergency and the war in Ukraine, which in turn, affected the cost of transport. The cost of containers tenfold increased during the past year, putting retailers who based their strategy on Asian imports, in great difficulty. Luckily for them, the effect was temporary and by the beginning of 2023 shipping costs were back to similar values as in 2021.

➔ The rollercoaster cost of container transport from China to Europe from January 2019 to October 2022.

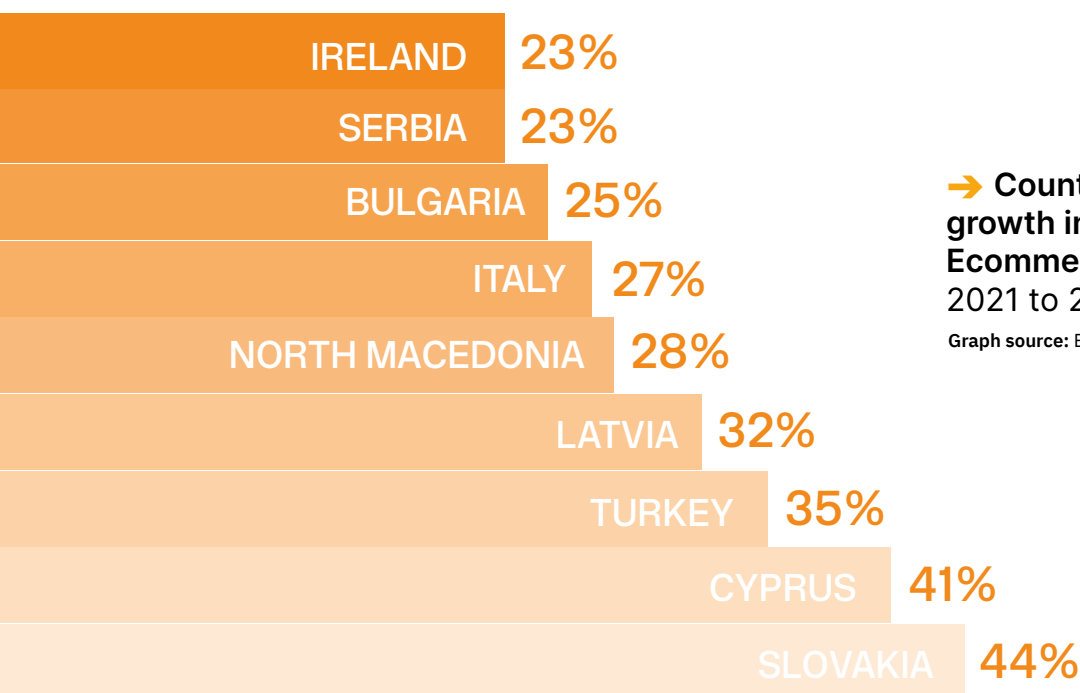
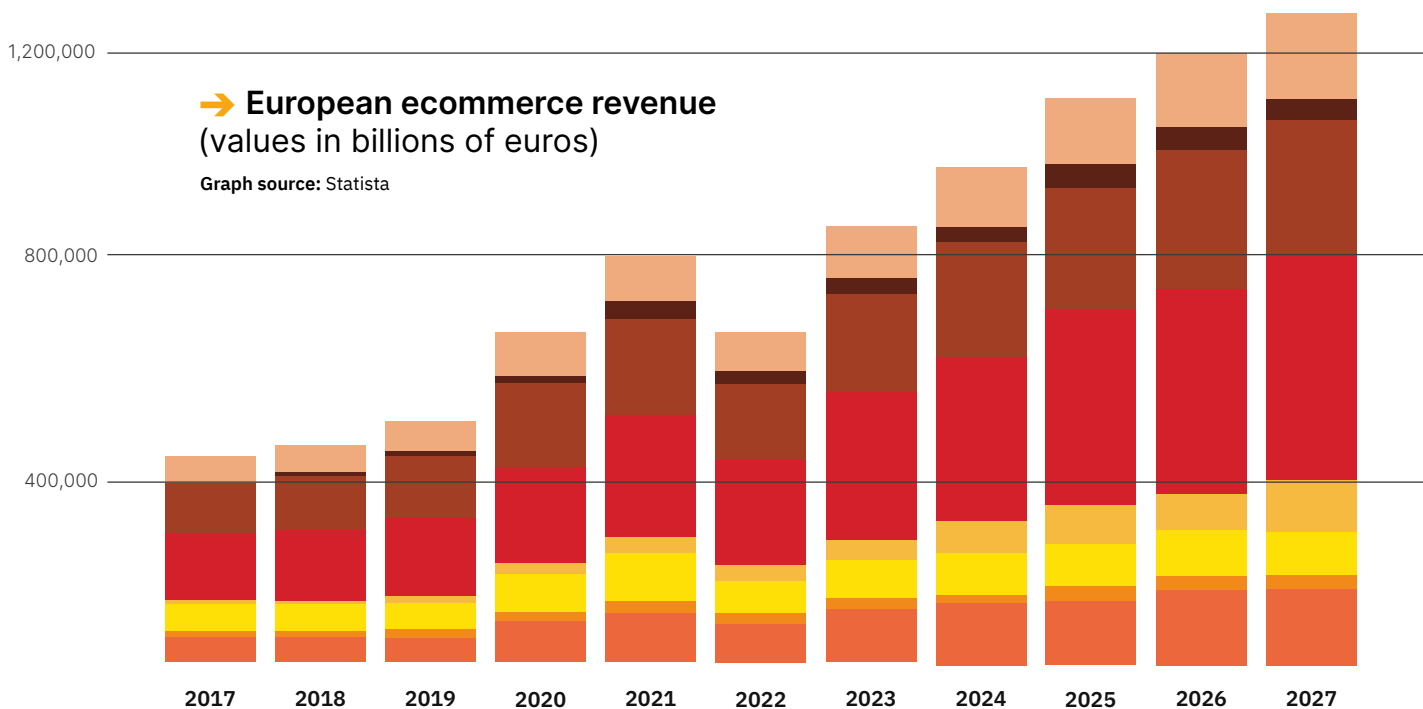
Graph source: Ningbo Container Freight Index (NCFI), 2022



## Ecommerce in Europe

60% of European citizens now buy online and the European Ecommerce turnover accelerated<sup>6</sup> in 2021 coming to be worth USD 732 billion<sup>7</sup>. The overall turnover in 2022, however, fell back to 2020 values and lost about 100 billions in consumer goods.

- Toys, hobby e DIY
- Media
- Furniture
- Food
- Fashion
- Electronics
- Beverages
- Beauty, Health, Personal & Household Care



→ **Countries with the highest growth in the number of Ecommerce purchases** (from 2021 to 2022).

Graph source: Eurostat

**ALBANIA 70%**

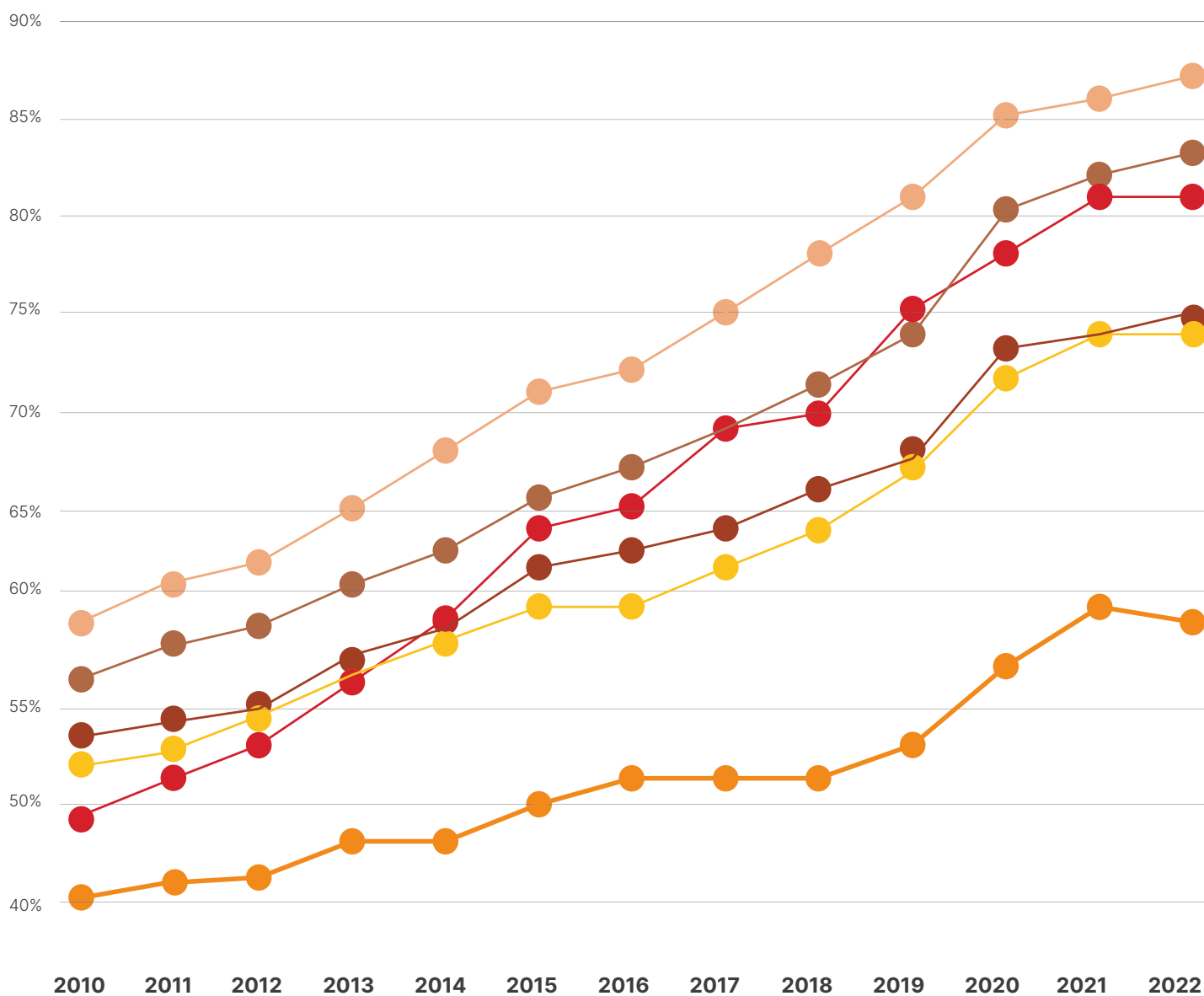
6: European Ecommerce revenues jump 30% to US\$465bn in 2021, Internet Retailing, 2022;  
7: Statista, dicembre 2021 <https://www.statista.com/outlook/dmo/ecommerce/europe#users>.

Responsible for the contraction on the customer front were in particular the over-55s, who suffered a slight drop for the first time in terms of Internet users from 60% to 59% in Europe<sup>8</sup>.

→ **Internet users who bought or ordered goods or services for private use in the previous 12 months (by age group).**

- 16-24 years
- 25-34 years
- 35-44 years
- 45-54 years
- 55-74 years
- EU

Graph source: Eurostat



8: Eurostat, 2023



## CHAPTER TWO

# Ecommerce in Italy

2022 reabsorbed part of the growth of digital citizens owing to the pandemic as about one million people returned to offline life after being forced into the digital world due to the lockdown. In Italy, the online penetration among the population (aged 2 and over) reached 75.1% in January 2023 (-1.2% compared to the previous year) with 44 million single monthly users and a reduction of about one million people compared to last year. Those who stayed online, however, behaved similarly in terms of time spent online, which actually increased from 2h28' to 2h40' on an average day. The number of online shoppers continues its growth, having already exceeded 38 million last September.

Geographically, the North West is the most connected area with 64.7% of Italian adults connected and the South and Islands close with 58.6%<sup>9</sup>.

Of these, some 38 million Italians connect to Ecommerce sites and apps during the month<sup>10</sup>. In Italy, 47.1% of people aged between 16 and 64 buy something online every week

compared to 57.6% worldwide<sup>11</sup>.

As for access devices, mobile is the tool of choice with 49.6% of Italians' time spent<sup>12</sup>.

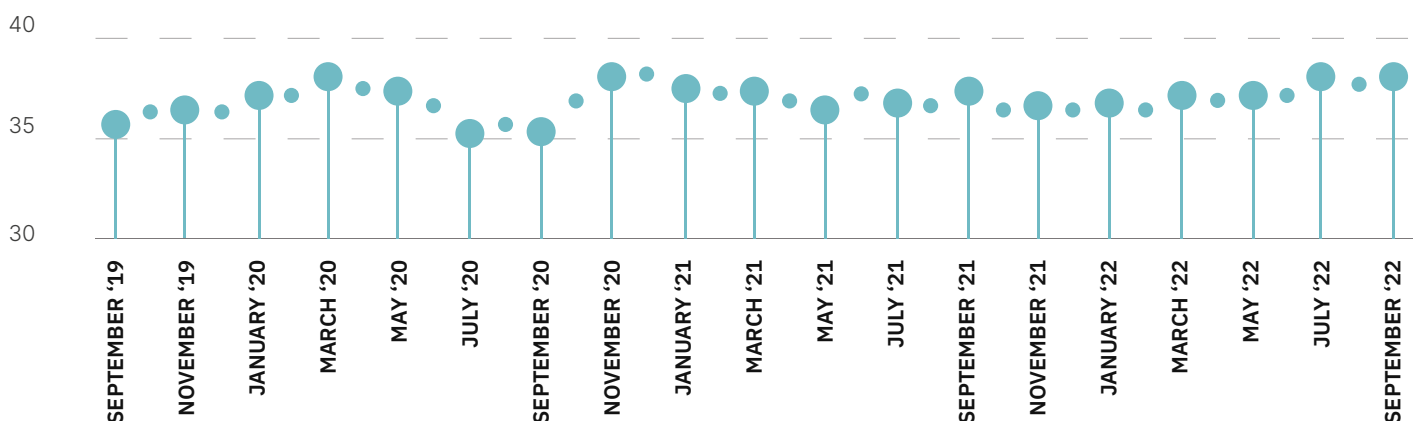
In terms of connected Italians' expenditure, however, there is still ample room for growth if we consider that in Italy 2.26% of GDP is spent by Italians on online consumer goods compared to a world average of 3.53% and, for example, Great Britain where this percentage reaches 5.13%<sup>13</sup>.

# 38 milion

Italians connect to Ecommerce sites and apps during the month

→ Italian online clients are slightly increasing (millions of monthly single users)

Graph source: Audiweb, 2022



<sup>9</sup>: Total Digital Audience in January 2023, Audiweb 2023; <sup>10</sup>: Audiweb, 2022; <sup>11</sup>: GWI, Q3 2022; <sup>12</sup>: DIGITALE NEL MONDO, Datareport AI, 2023; <sup>13</sup>: Statista digital market outlook, 2023.

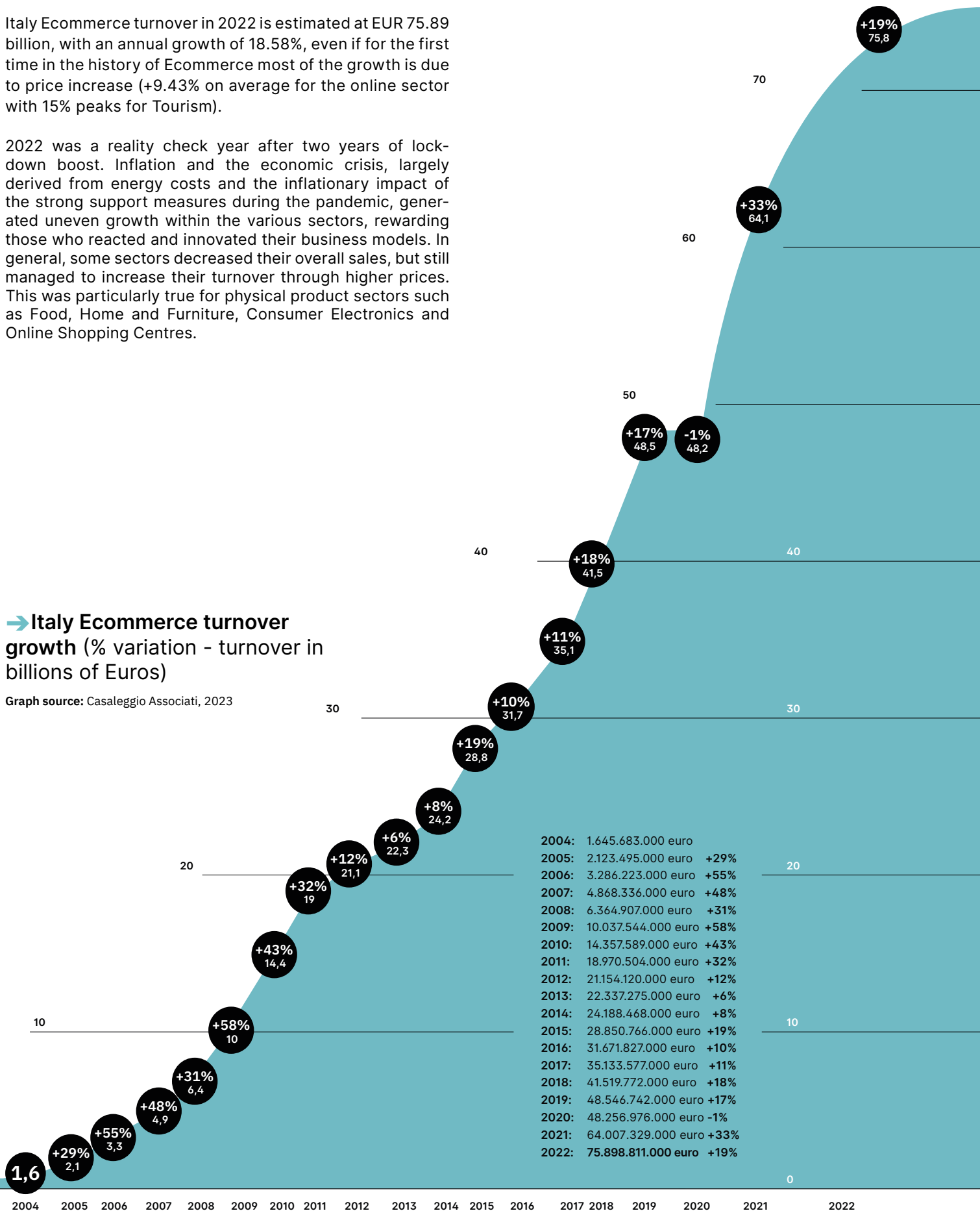
## Ecommerce in Europe

Italy Ecommerce turnover in 2022 is estimated at EUR 75.89 billion, with an annual growth of 18.58%, even if for the first time in the history of Ecommerce most of the growth is due to price increase (+9.43% on average for the online sector with 15% peaks for Tourism).

2022 was a reality check year after two years of lockdown boost. Inflation and the economic crisis, largely derived from energy costs and the inflationary impact of the strong support measures during the pandemic, generated uneven growth within the various sectors, rewarding those who reacted and innovated their business models. In general, some sectors decreased their overall sales, but still managed to increase their turnover through higher prices. This was particularly true for physical product sectors such as Food, Home and Furniture, Consumer Electronics and Online Shopping Centres.

### → Italy Ecommerce turnover growth (% variation - turnover in billions of Euros)

Graph source: Casaleggio Associati, 2023



## Revenues distribution in 2022

The impact of the lockdown has strongly affected the balance of power between sectors that are constantly changing. Leisure, which has been the most important sector for years, continues to be so and accounts for exactly half (50.07%) of the turnover. The positive impact is due in particular to the growth of online gaming, as well as purchases related to hobbies and sport. However, the sector is limited by the illegal market, which accounts for the same volume as the legal market. In this regard, there are over 10,000 sites that have been blacked out by the Monopolies Agency on which customers nevertheless continue to go via VPN because they can offer better odds without paying tax.

Online shopping centers remain in second place in the distribution of revenues, 19%, compared to 22% in the previous year. This is one of the sectors that felt the crisis the most and had zero growth over the previous year when it still benefited from the long tail of the lockdown.

Tourism is the sector with the highest growth, after two years it has managed to exceed the turnover of 2019 and has finally emerged from its supply crisis. Growth was 47% in 2022, one third of which was due to price increases. However, it has not yet managed to regain second place in the turnover breakdown, remaining at 13.26% of the total Ecommerce turnover. Tourism has also regained speed thanks to new targets such as rural areas and remote-working tourism with long stays in low season to combine work and leisure.

Food, after gaining +63% in 2020, and +37% in 2021 is seeing a downturn in the sector with customers partly returning to buying in-store. In 2022 it grew by +5.5% which, however, pays for a price increase of 9.5% and thus a negative growth in real terms.

Insurance sector follows, which remained stable in terms of share (4.11% of the total) with an annual growth rate of 23% thanks to new embedded insurance services.

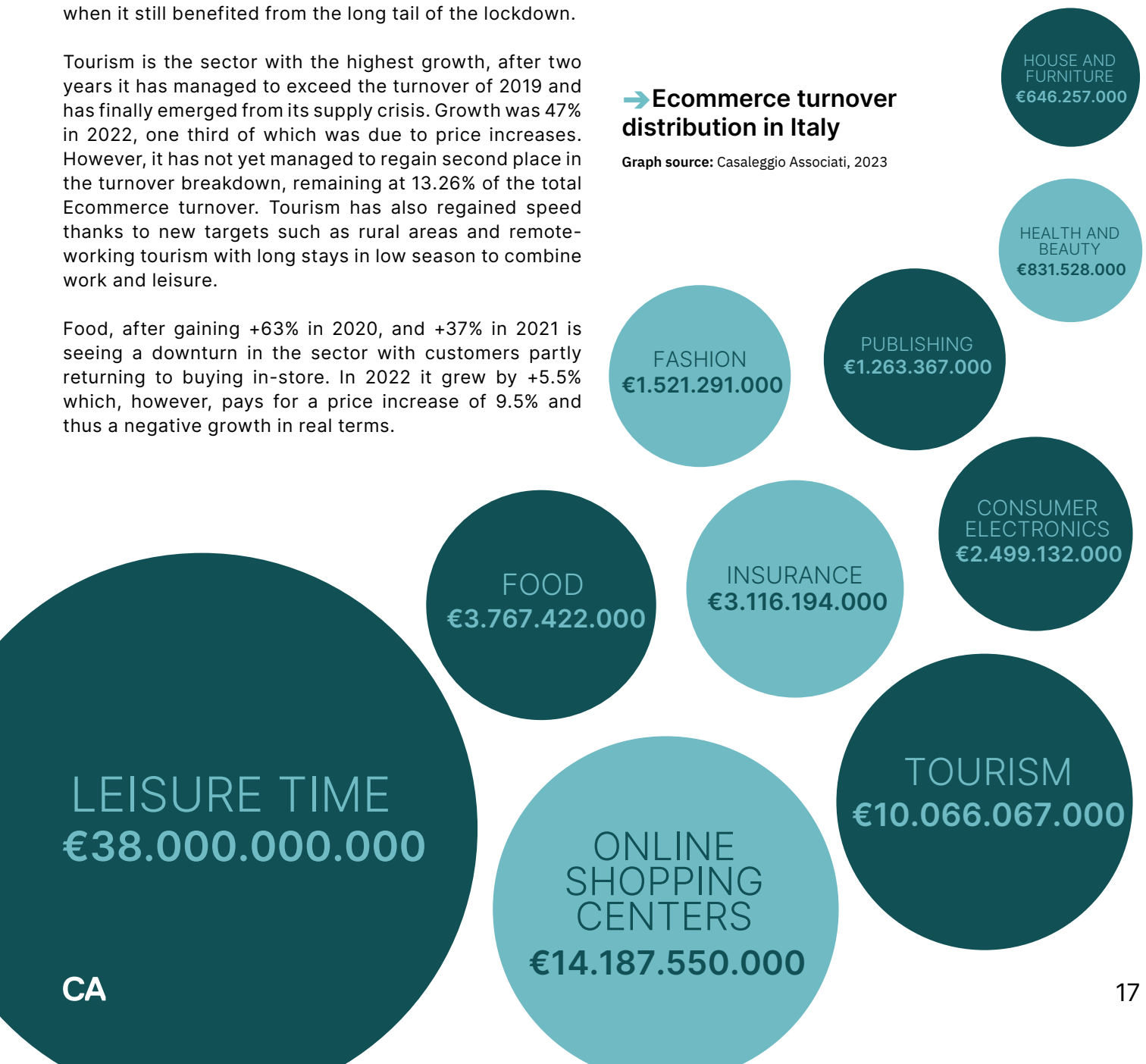
Consumer Electronics grew by 7% with 3.3% of total sales; followed by Fashion: stable at 2% of the total, but continuing its growth with +15.9% in 2022, half of which is due to price increase.

As for Publishing, online sales grew by 10% and the sector dropped to 1.66% share.

Health and Beauty / Home and Furnishing close the ranking. These two sectors still weigh very little on the total, 1%. The former has had the highest growth (after Tourism) by 25%, decreasing from 38% of the previous year, while the latter has had a setback with growth (8%) below the price increase level (10%).

### → Ecommerce turnover distribution in Italy

Graph source: Casaleggio Associati, 2023



The year 2023 will see a continuation of the post-lockdown trend with strong growth by manufacturers at the expense of retailers. In fact, the highest growth in almost all consumer goods sectors is expected from manufacturers, which bodes for significant investments by these players. One extra indicator of the fact that retailers will have to justify their role in the distribution chain even more.

On average, an Italian Ecommerce site is expected to grow by 17.26% in terms of turnover by 2023. The largest growth is expected to be in the Leisure Time sector (+23%) after the reconfirmation of concessions for two years on online gaming, followed by Food and Fashion (+20%) and Health and Beauty (+19%). Home Office and Furnishings (+18%), Consumer Electronics (+12%), Online Shopping Centres (+10%) are expected to increase and finally, with more moderate growth, Publishing and Insurance (both +5%).

Among the main objectives of the digital strategy set by the companies surveyed for 2022 are: 72% to increase profit/turnover, which has risen sharply since last year (59%), 50% to acquire new customers, 45% to increase awareness (doubling last year's 28%), 36% to retain current customers, 30% to gain market share over competitors, and 6% other objectives.

An Italian Ecommerce site is expected to grow by

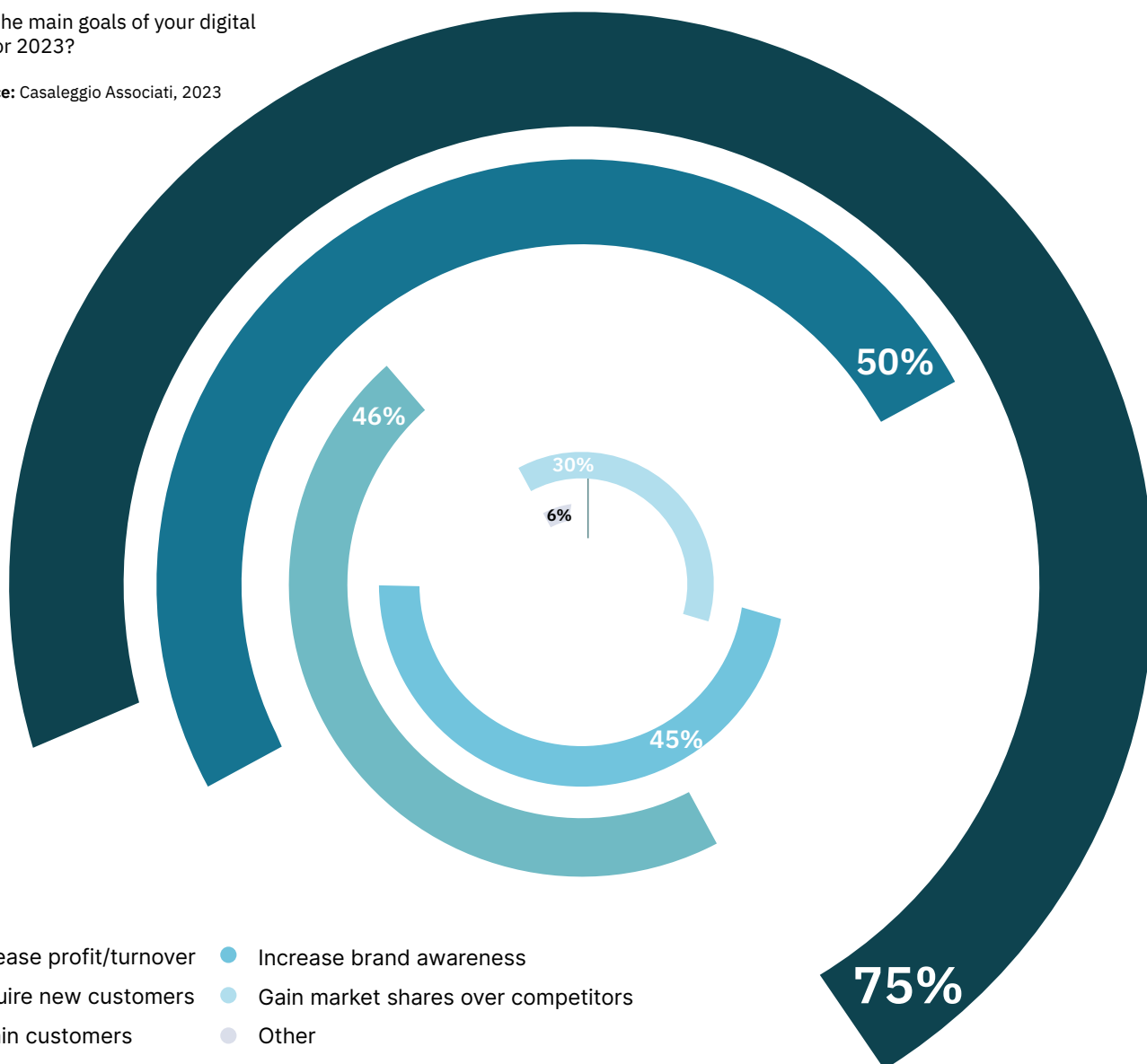
# 17,26%

in terms of turnover by 2023

## → 2023 Digital strategy (multiple choice)

What are the main goals of your digital strategy for 2023?

Graph source: Casaleggio Associati, 2023



- Increase profit/turnover
- Acquire new customers
- Retain customers
- Increase brand awareness
- Gain market shares over competitors
- Other

Turnover is still mainly derived from the website (40 per cent), however the percentage of other channels is rising significantly, in particular marketplaces (28 per cent) and social media (13 per cent). Mobile apps, especially for larger merchants, has also become an important asset and now accounts on average for 8% of turnover.

40%  
Own-website

→ Online turnover channels

Turnover mainly comes from:

Graph source: Casaleggio Associati, 2023

11%  
Other

13%  
Social Media

28%  
Marketplace

8%  
Mobile App



# Top Ecommerce sites in Italy

























































The 100 companies that led Ecommerce in our country in the last year, according to the popularity index defined by Casaleggio Associati<sup>14</sup>.

## Sectors

- Marketplace
- Tourism
- Household & Furniture
- Electronics
- Fashion
- Leisure Time
- Car & Motorbike
- Publishing
- Bets & Casino
- Pharmacies
- Health & Beauty
- Food
- Insurance
- Jewelry & Watches
- Pets
- Kids & Toys
- Sport

1		Amazon	★★★★★	23		JustEat	★★★★★
2		eBay	★★★★★	24		HP	★★★★★
3		Subito	★★★★★	25		Auto-doc	★★★★★
4		Booking.com	★★★★★	26		Mondadori Store	★★★★★
5		Trenitalia	★★★★★	27		Xiaomi	★★★★★
6		Leroy Merlin	★★★★★	28		Feltrinelli	★★★★★
7		Mediaworld	★★★★★	29		eDreams	★★★★★
8		Ikea	★★★★★	30		Sisal	★★★★★
9		UniEuro	★★★★★	31		Efarma	★★★★★
10		Samsung	★★★★★	32		Game Stop	★★★★★
11		Zalando	★★★★★	33		Apple Store	★★★★★
12		TicketOne	★★★★★	34		Mondo Convenienza	★★★★★
13		Decathlon	★★★★★	35		Groupon	★★★★★
14		Ibs.it	★★★★★	36		Expedia	★★★★★
15		ManoMano	★★★★★	37		Vivaticket	★★★★★
16		Ryanair	★★★★★	38		Vinted	★★★★★
17		AliExpress	★★★★★	39		Instant Gaming	★★★★★
18		Airbnb	★★★★★	40		The Space Cinema	★★★★★
19		ePrice	★★★★★	41		StarCasinò	★★★★★
20		The Trainline	★★★★★	42		Zara	★★★★★
21		Euronics	★★★★★	43		Easyjet	★★★★★
22		Italo	★★★★★	44		Flixbus	★★★★★

14: For the monthly-based ranking: <https://www.ecommerceitalia.info/e-commerce-ranking/>

45		H&M	★★★★★	73		Yoox	★★★★★
46		Microsoft	★★★★★	74		Sephora	★★★★★
47		Libraccio	★★★★★	75		Garmin	★★★★★
48		Wizz Air	★★★★★	76		Farmae	★★★★★
49		Snai	★★★★★	77		Prima	★★★★★
50		Asos	★★★★★	78		Volotea	★★★★★
51		Nike	★★★★★	79		Farmacia Loreto	★★★★★
52		LG	★★★★★	80		Lenovo	★★★★★
53		Nintendo	★★★★★	81		Trenord	★★★★★
54		Huawei	★★★★★	82		Etsy	★★★★★
55		Adidas	★★★★★	83		Wish	★★★★★
56		Notino	★★★★★	84		Bonprix	★★★★★
57		Volagratis	★★★★★	85		Lastminute.com	★★★★★
58		Lego	★★★★★	86		Douglas	★★★★★
59		StrumentiMusicali.net	★★★★★	87		Eurobet	★★★★★
60		Lottomatica	★★★★★	88		Libreria Universitaria	★★★★★
61		Shein	★★★★★	89		Monclick	★★★★★
62		Deliveroo	★★★★★	90		Pandora	★★★★★
63		Obi	★★★★★	91		Costa Crociere	★★★★★
64		Cisalfa Sport	★★★★★	92		Ticketmaster	★★★★★
65		Maisons du Monde	★★★★★	93		Comet	★★★★★
66		Bet365	★★★★★	94		Alibaba	★★★★★
67		Zooplus	★★★★★	95		Docpeter.it	★★★★★
68		Macrolibrarsi	★★★★★	96		Philips	★★★★★
69		Sony	★★★★★	97		Unipol Sai	★★★★★
70		OVS	★★★★★	98		Arcaplanet	★★★★★
71		Trony	★★★★★	99		Kasanova	★★★★★
72		Panini	★★★★★	100		Unilibro	★★★★★

The **Italy Ecommerce Ranking** by **Casaleggio Associati** monitors the most popular Ecommerce sites in Italy every month, up to a total of **3.258 companies** divided in **17 different product sectors**.

## Italy Ecommerce Awards 2023

Starting from the monthly rankings numbers, we compared the annual data to assess the last year's best Ecommerce sites, ordered by popularity, divided in 4 different rankings.

Subscribe to the Ecommerce Italy newsletter to keep up with monthly updates:

[www.ecommerceitalia.info/e-commerce-awards-2023](http://www.ecommerceitalia.info/e-commerce-awards-2023)



### Top 10 Fastest Growing 2023

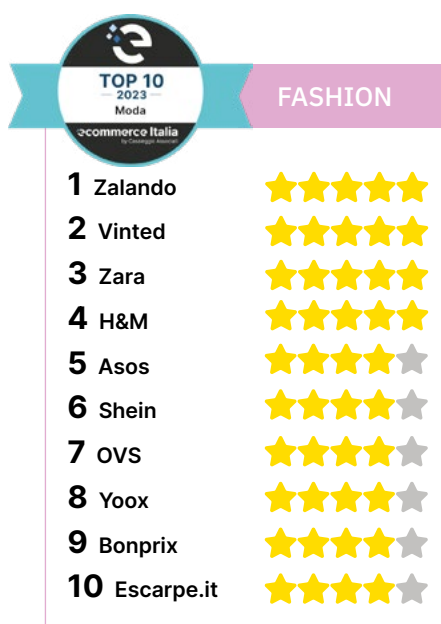
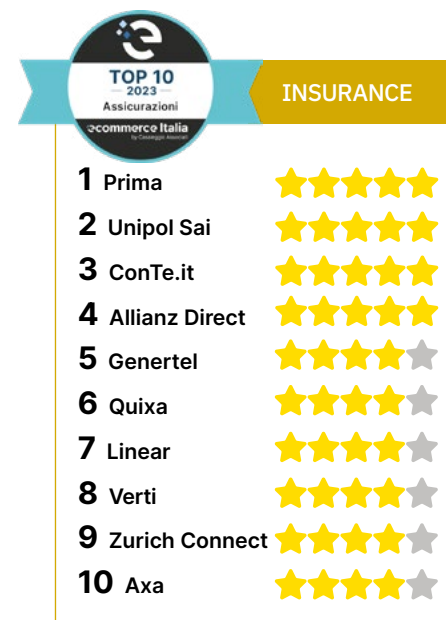
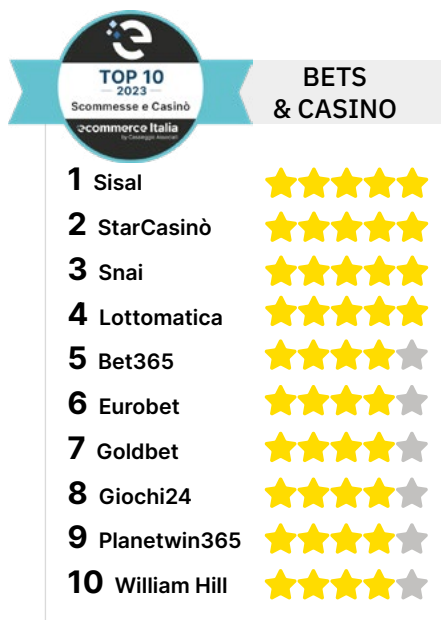
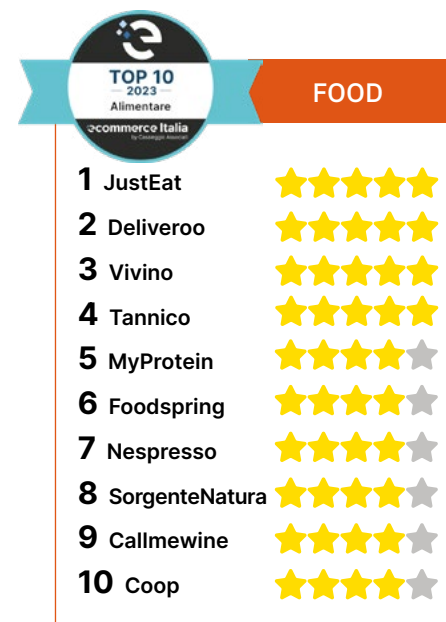
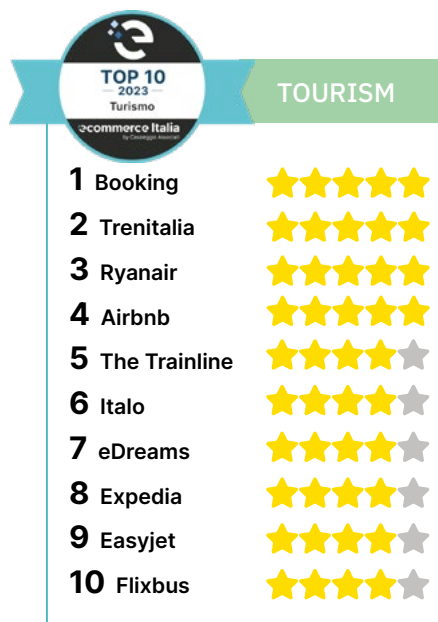
10 Ecommerce companies that grew the most over the last year, according to our weighted ranking.

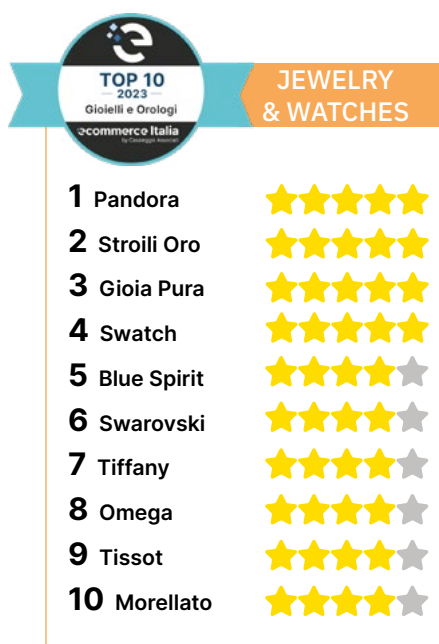
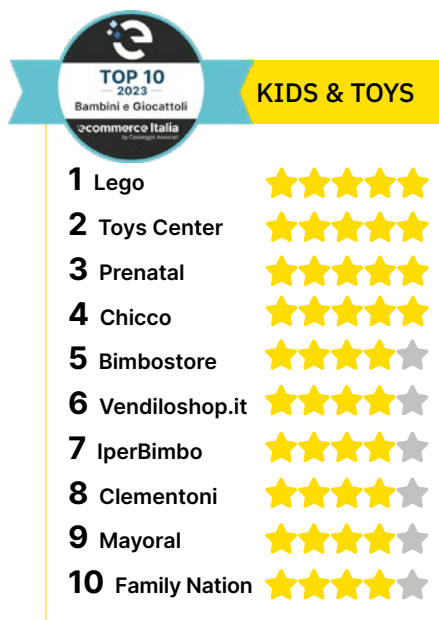
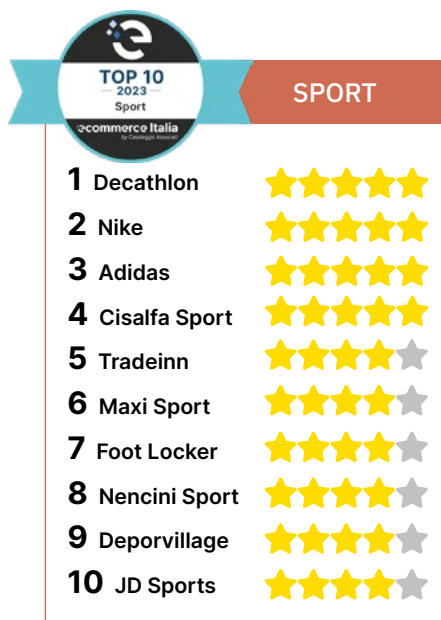
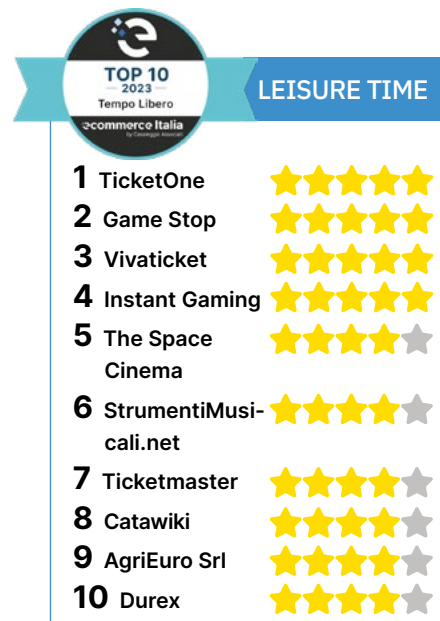
	COMPANY		POSITION	SECTOR	COUNTRY	RATING
1	<b>Vinted</b>	Vinted	38	Fashion		★★★★☆
2	<b>ticketone</b>	TicketOne	12	Leisure Time		★★★★☆
3	<b>starcasinò</b>	StarCasinò	41	Bets & Casino		★★★★☆
4	<b>VIVATICKET</b>	Vivaticket	37	Leisure Time		★★★★☆
5	<b>docpeter.it</b>	Docpeter.it	95	Pharmacies		★★★☆☆
6	<b>RYANAIR</b>	Ryanair	16	Tourism		★★★★☆
7	<b>ticketmaster</b>	Ticketmaster	92	Leisure Time		★★★☆☆
8	<b>PANINI</b>	Panini Shop	72	Publishing		★★★★☆
9	<b>WIZZ</b>	Wizz Air	48	Tourism		★★★★☆
10	<b>AUTODOC</b>	Auto-doc	25	Car & Motorbike		★★★★☆



## Top 10 Sector Leaders 2023

Ten most popular companies for each of the 17 product sectors.





## CHAPTER THREE

# Ecommerce trends

Last year saw the acceleration of some trends that will take hold during 2023. In particular:

## Inflation upsets the balance

For the first year, Ecommerce experienced inflation in 2022 and at least throughout 2023 too, merchants will have to deal with it.

Operators have been affected very differently. Those who suffered the greatest impact (around -15/20% in terms of shrinking turnover) were retailers of products imported from China, due to the spike in container transport costs in 2022 increased tenfold compared to the previous year, as well as an unfavourable euro-dollar exchange rate. Luckily for them, container prices have now returned to normal values.

The characteristics that affected retailers were:

- **Basic necessities and non-necessities** (spare parts shops had an important increase compared to new parts ones).
- **Raw materials used** (in general, services were less impacted than products, products imported from Russia such as pellets had important increases).
- **Import vs. export of products from outside the euro-zone** (those who produce in the euro zone and have a lot of sales outside the EU benefited, however, most operators suffered).

- **Energy use in production or service delivery.** Impact of energy costs in 2022 has further aggravated the situation for some particularly energy-intensive sectors. This was also seen on the type of products chosen by customers with a boom in e.g. heaters and generators and products to save money.

- **Entry price vs. lux.** Products and brands with a low entry price experienced a significant increase in volume. On comparison sites, the average desired saving in the product search is 15-20%. This is why some customers are shifting to the penultimate model released and off-peak times to achieve the desired savings.

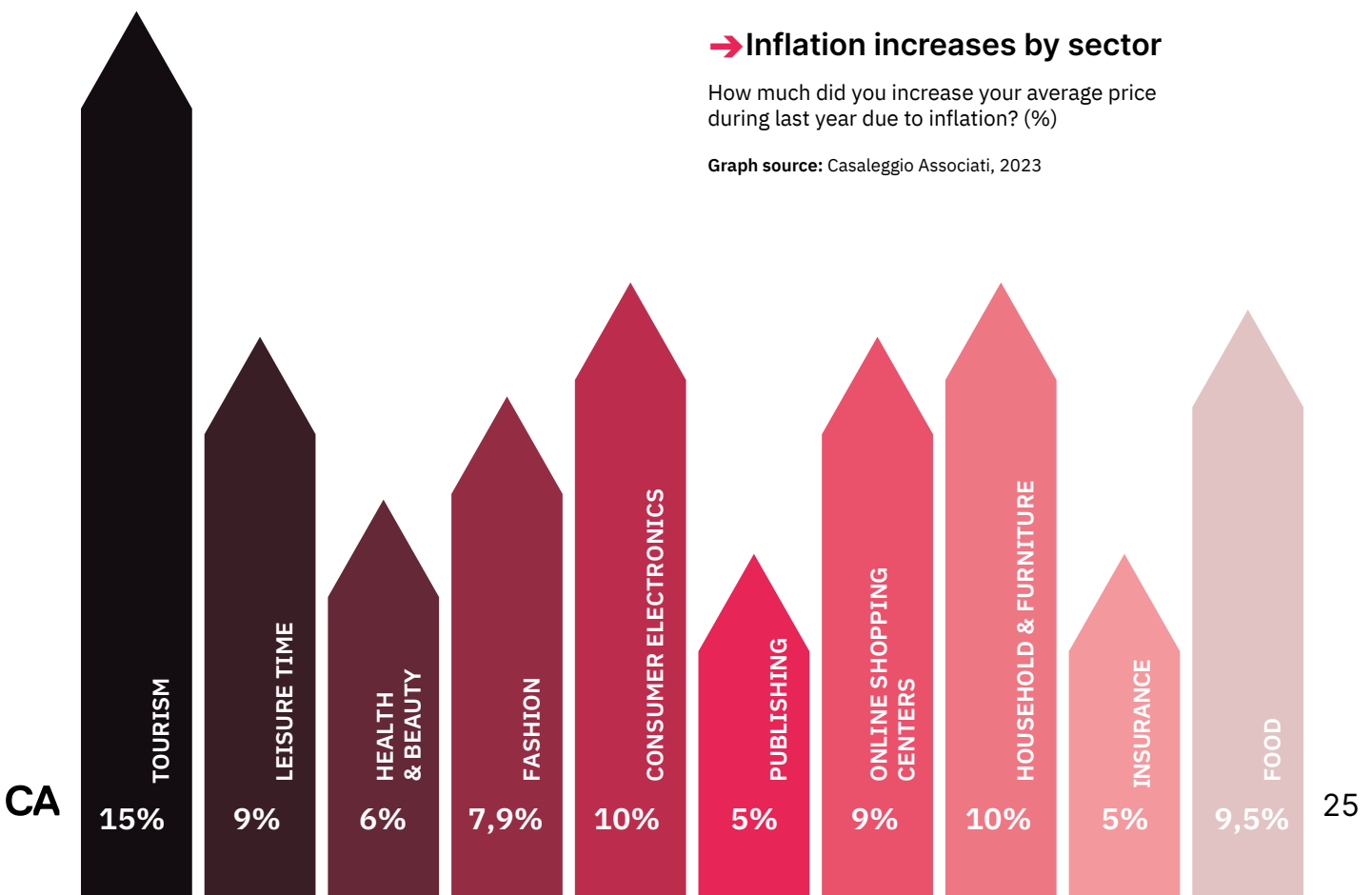
- **Poor volume products vs. high end.** In terms of volume, in some cases manufacturers of bulky products produced in Asia have seen high-end products gaining more sales share due to prices varying less than entry price products, which have experienced absolute increase due to shipping affecting the total value more.

- **Variable costs with higher incidence on the fixed component.** Hosts of short-term rentals (e.g. Airbnb) found themselves dealing with heating and electricity bills that were double or triple than the previous year's figure and could no longer include them in the price.

## → Inflation increases by sector

How much did you increase your average price during last year due to inflation? (%)

Graph source: Casaleggio Associati, 2023

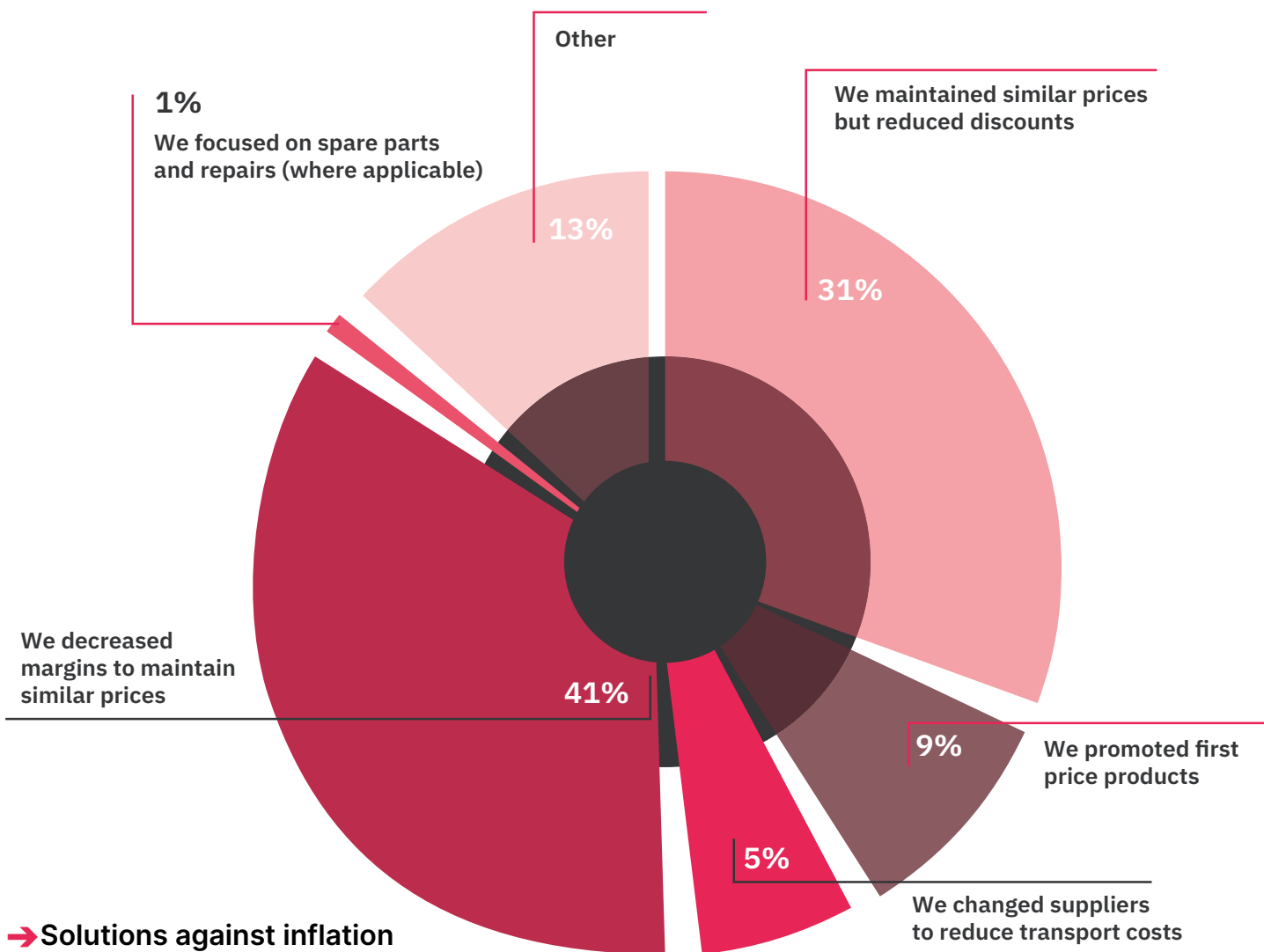


Operators had different approaches:

- **Waiting for the annual price list change that took effect in 2023.** In the pharmaceuticals sector, for example, there were not many increases during 2022, but at the beginning of 2023 price lists changed due to supplies' prices increase. Production is often European and has not been impacted by transport and exchange rates.
- **Medium-term contracting with couriers.** Forward-looking retailers negotiated a fixed price with couriers before the major increase in energy costs.
- **Fewer discounts and promotions for the same price.** Keeping prices stable, some operators raised the average price by decreasing the number of discounts and offers during the year.
- **Optimised delivery service to compress the price.**
- **Price reductions for market share.** Some retailers with good margins and a high-demand product decided to reduce prices to increase market share and overall turnover.

- **Made in Italy.** Those who were able to, moved production to Italy in 2022 with (temporary) transport cost advantages.
- **Price transparency rewards.** Airbnb hosts, for example, who decided to add an average energy cost a priori to the price, benefited much more than those who decided to add a variable cost regardless of the stay. Customers reward price transparency.

In general, operators largely tried to keep prices similar to the previous year by squeezing margins (41% of companies), in some cases by decreasing discounts (31%), by promoting first-price products (9%) and in some cases by looking for new and less impacted by the problem of international transport (5%) suppliers.



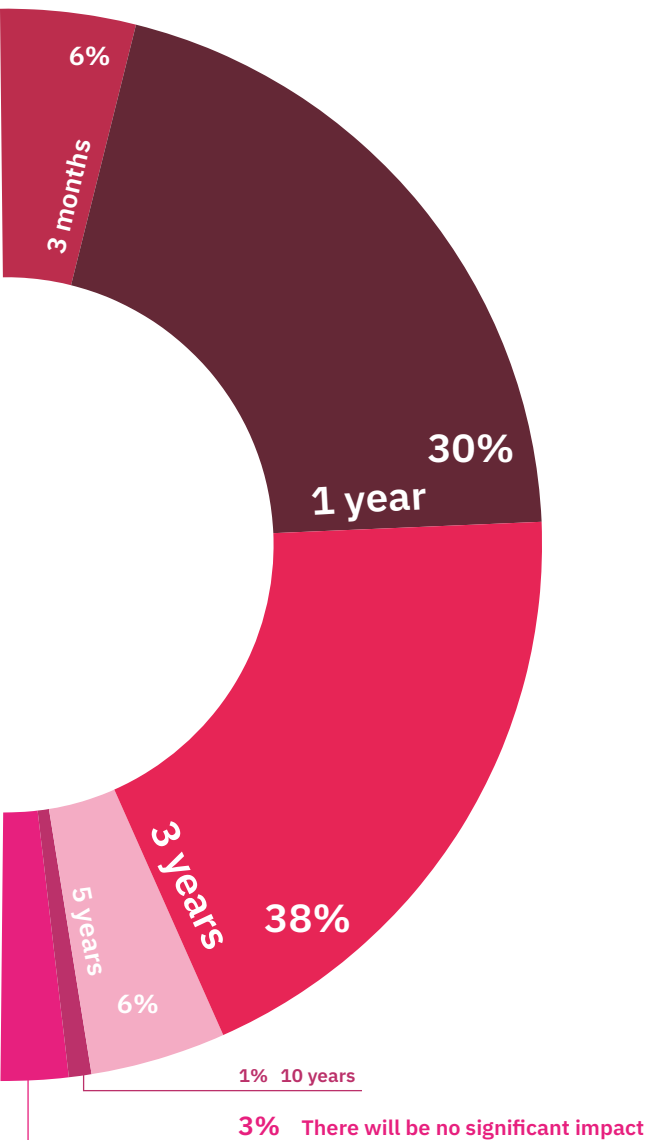
→ **Solutions against inflation**

What solutions did you implement to reduce inflation impact on sales?

Graph source: Casaleggio Associati, 2023

## AI-commerce

Italian Ecommerce operators believe that there will be a significant impact on online sales due to Artificial Intelligence and the majority claim that it will happen within three years.



After the hype on ChatGPT, we started thinking and designing the application for online selling. The ability to understand a person's demand and needs in an evolved way and imagine a coherent and customised response for the individual, opens up a new dimension of online shopping.

Today, it is necessary to enter an online shop with products to be searched for individually, trying to match our needs to the offer. The prospect is that of an artificial intelligence object that can not only understand our needs, but also predict the best solution regard-

less of whether we would have known to look for it. This dimension takes us to a new level of online sales where we will be able to talk to our Alexa or Google Assistant integrated with ChatGPT (or Bart) who can converse with us and organise an aperitif with friends at home by ordering what we need or propose an outfit for us to wear to a special event we have to attend.

The ability to extremely tailor the solution to the individual's needs will bring about some important changes:

1- The centrality of virtual assistants. Brands and sites will lose even more importance by increasing the concentration of contact points if it is sufficient to speak to a voice assistant such as Siri or Alexa. Nowadays in Italy, 22.3% of people already use voice assistants at least once a week<sup>15</sup>.

In Italy  
**22,3%**  
of people uses voice assistant

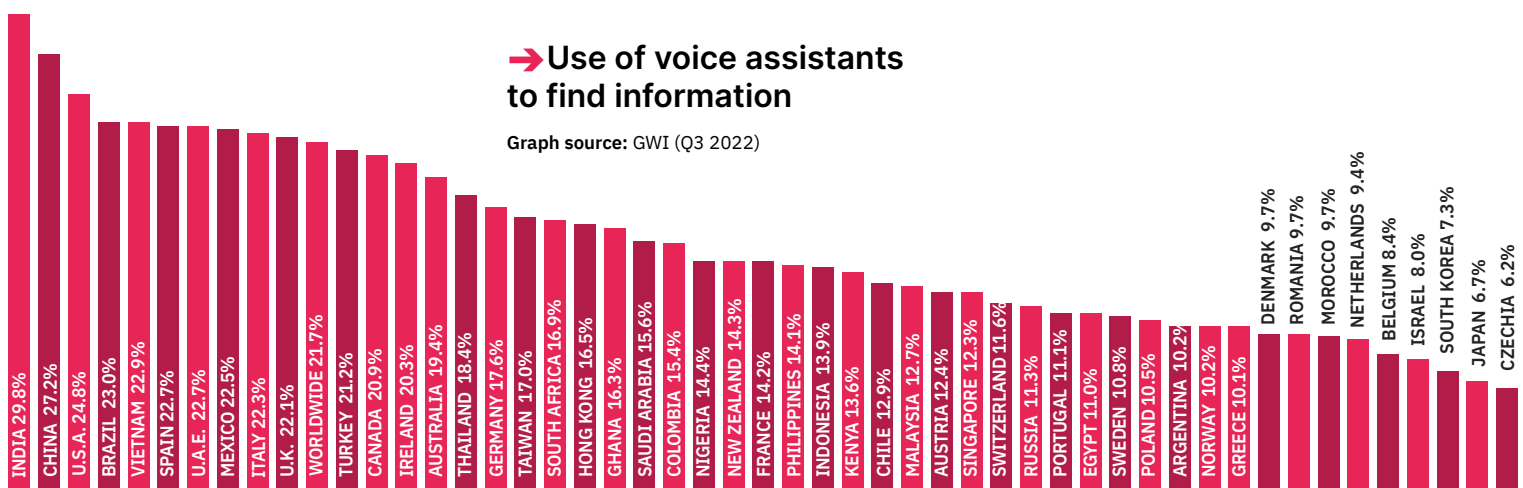
### → Artificial Intelligence will have a significant impact on Ecommerce

How long until Artificial Intelligence (as ChatGPT) will have a relevant impact on Ecommerce companies business model?

Graph source: Casaleggio Associati, 2023

### → Use of voice assistants to find information

Graph source: GWI (Q3 2022)



15: DIGITALE NEL MONDO, Datareportal, 2023.

**2- AI optimisation.** We will no longer have to worry so much about SEO (Search Engine Optimisation) but about AIO (Artificial Intelligence Optimisation) to ensure our solution is known and evaluated cohesive with the individual profile of the person who is talking to the Virtual Assistant and the specific usage occasion.

**3- Automated personalised customer support.** The textual interaction capability of new conversational software will make conversations with humans and AI objects indistinguishable, allowing to support customers in real time in their purchase choices and in a hyper-personalised way.

**4- Generative Commerce.** If today one can create texts with ChatGPT or images with Dall-e in the very near future the generative capability will also evolve towards physical products. Generative Commerce will be the new frontier not only to customize the product, but to create them directly from scratch with an artificial stylist or designer.

**5- On-demand production.** If products can be designed in a hyper-customised way, it will become necessary to create new production processes in real time for these products. This is a trend

already underway first with the Zara and H&M business model that brought about fast fashion, and today Shein that has further accelerated this process.

Shein represents the new model of the native internet fast fashion and today it has already surpassed Zara and H&M in terms of online popularity and is ready to overtake them both in terms of turnover thanks to a much higher production capacity. Shein's model is in fact entirely online-based (no physical shops) and manages to make 5 to 10 thousand new products available every day compared to Zara's 20 to 25 thousand per year. The model is basically based on on-demand production and a large promotional budget.

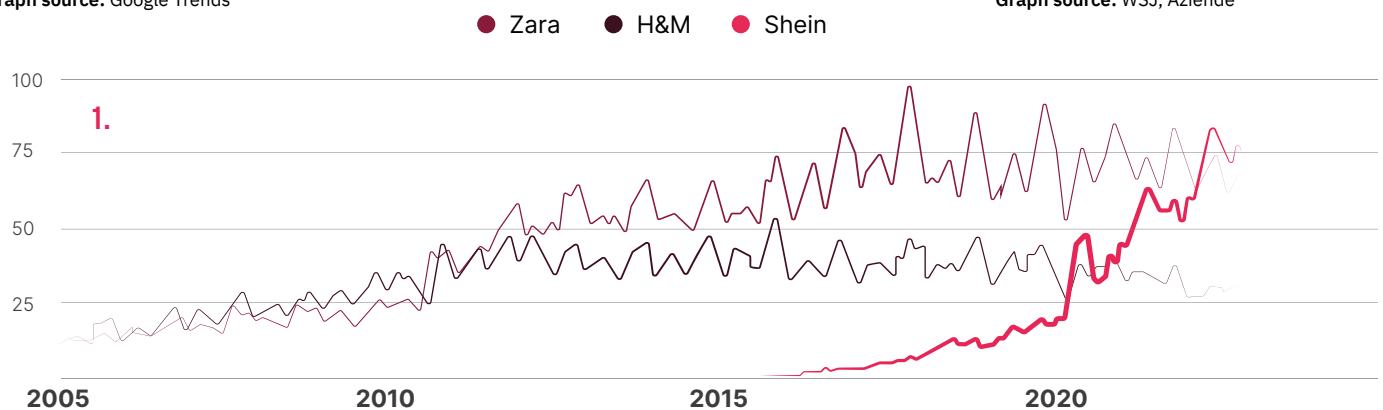


**→ Artificial intelligence will design the products.**

**Graph source:** Shein, Stable Diffusion via Benedict Evans  
The pictures show three products that can be purchased on Shein, one was created by AI.

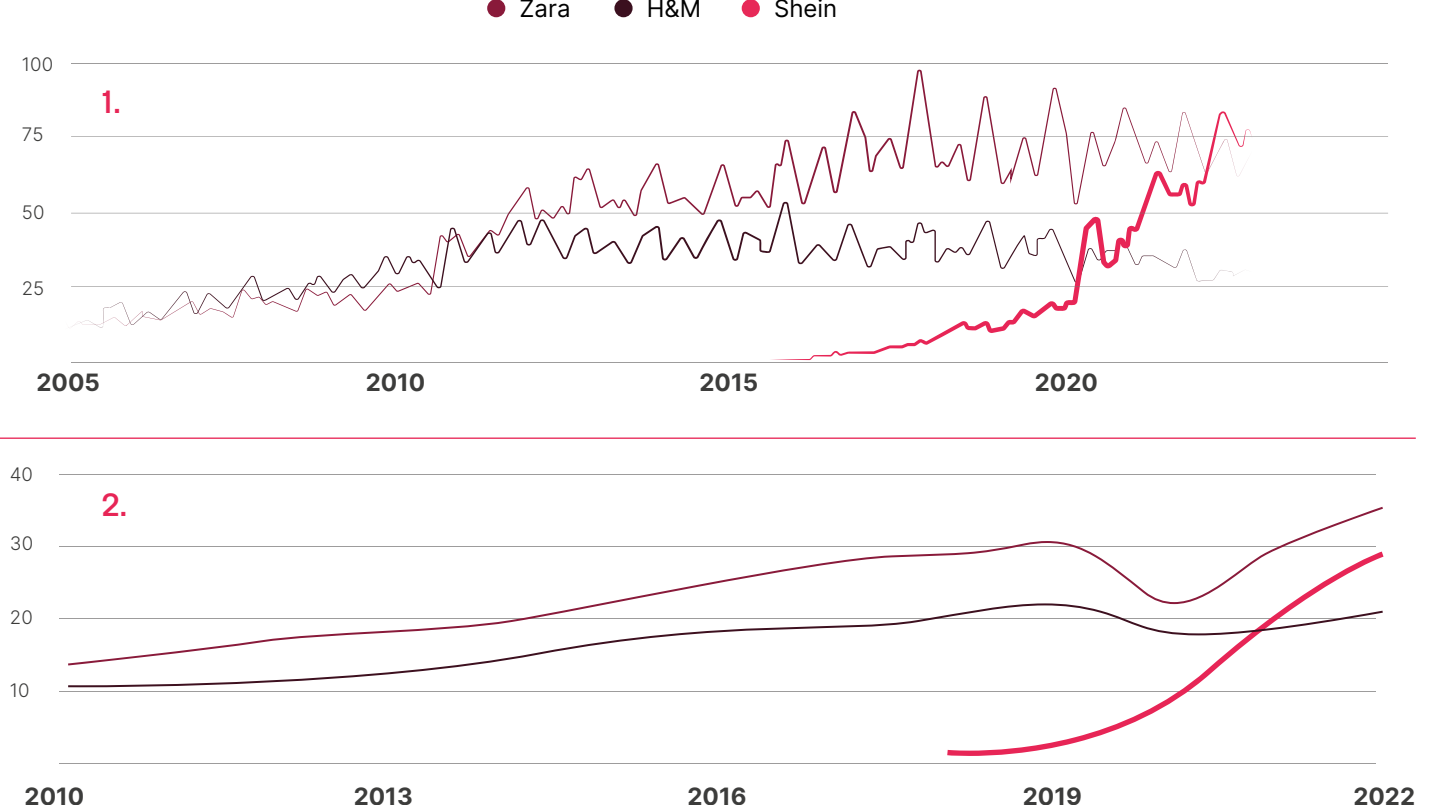
**→ 1. Shein overcomes H&M and Zara for popularity**

**Graph source:** Google Trends



**→ 2. Shein is in line to surpass Zara in terms of turnover**

**Graph source:** WSJ, Aziende



## (Chinese) suppliers go direct

Suppliers have now overcome their fear of channel conflicts and have started to sell direct. Not just local producers, but especially the Asian ones to whom many Italian (and other) companies entrust their production. This phenomenon is particularly visible on marketplaces such as Amazon where the top sellers are increasingly Chinese. Anker, for example, has managed to create a \$2 billion business by selling its mobile phone accessories directly on Amazon.

The phenomenon is worldwide as manufacturers everywhere have decided to sell directly to the end customer. In 2022, for example, Nike between proprietary shops and online sales exceeded 40 percent of non-brokered direct sales. Casper went from being a mattress manufacturer to being listed on the New York stock exchange thanks to a brilliant direct sales strategy. Also looking at Italy, the Ecommerce ranking in Italy sees an increasing presence of fast-growing manufacturers.



## App commerce

The most established retailers and marketplaces have begun to build customer loyalty by moving the relationship to the app, avoiding all the intermediary traffic generation and enabling a series of services such as notifications or geolocalisation that allow an even closer and more personalised relationship with the customer.

### → Most used Ecommerce apps in the world (data 2022)

Graph source: Data.ai intelligence

	SHOPPING APP	COMPANY
1	Amazon	Amazon
2	Shopee	Sea
3	Flipkart	Flipkart
4	Aliexpress	Alibaba
5	Lazada	Alibaba
6	Mercadolibre	Mercadolibre
7	Shein	Shein
8	Meesho	Meesho
9	Ebay	Ebay
10	Myntra	Walmart

	SHOPPING APP	COMPANY
11	Walmart	Walmart
12	Daraz	Alibaba
13	Tokopedia	Goto Group
14	Avito	Kismet Capital Group
15	Wish	Contextlogic
16	Lidl Plus	Lidl
17	Ajo Shopping App	Reliance Industries
18	Ozon	Ozon
19	Wildberries	Wildberries
20	Olx	Naspers

## Impact on the world (ESG)

Many mainly Asian-owned operators in Italy view ESG activities as a low priority. However, some marketplaces and distributors (e.g. Lyreco) are starting to require minimum criteria to be able to onboard products. The push towards a more sustainable impact seems to come not only from the spirit of the individual entrepreneur, but also from market conditions dictated by marketplaces or, ultimately, from the law, which, for example, as of this year will oblige all companies in Europe with more than 200 employees to draw up a social report.

Sustainability strategies are still in their early days, with working on sustainable product and packaging being the most common (26%). Only 8% draw up a sustainability report today.

## (Economically) sustainable growth: and positive EBITDA

With the monetary tightening, only a few players can still afford negative ebitda. Looking at the top ten retailers in terms of turnover by product category, one can see that the players with a red sign on ebitda largely correspond to those who are receiving funding from external funds or groups with the aim of growing their market share. The year 2023 will see a further tightening of the investment capacity of these players and the keyword will increasingly become 'Economically Sustainable Growth'.

### → Ecommerce sustainability strategies

Regarding sustainability, your company:

Graph source: Casaleggio Associati, 2023

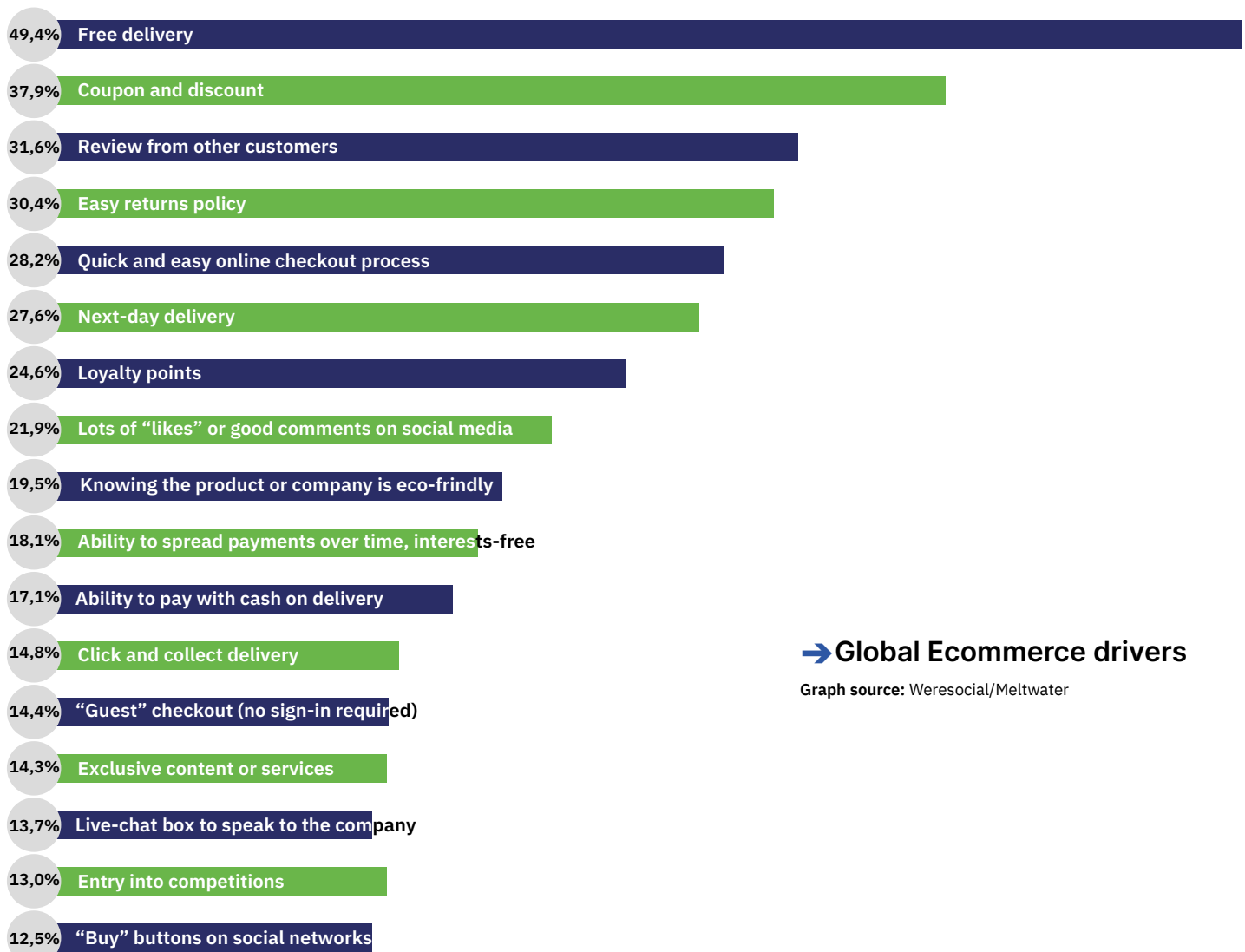




## CHAPTER FOUR

# Online marketing

Online marketing is evolving a great deal due to the change in the media used by the different generations, to an important evolution brought about by the digitalisation of processes (starting with paper flyers) and above all to regulatory evolutions too, which are redesigning the way systems are used (e.g. the cookieless era after the new privacy legislation on profiled advertising). Product and website promotion is no longer sufficient and the overall marketing and loyalty strategy is increasingly important.

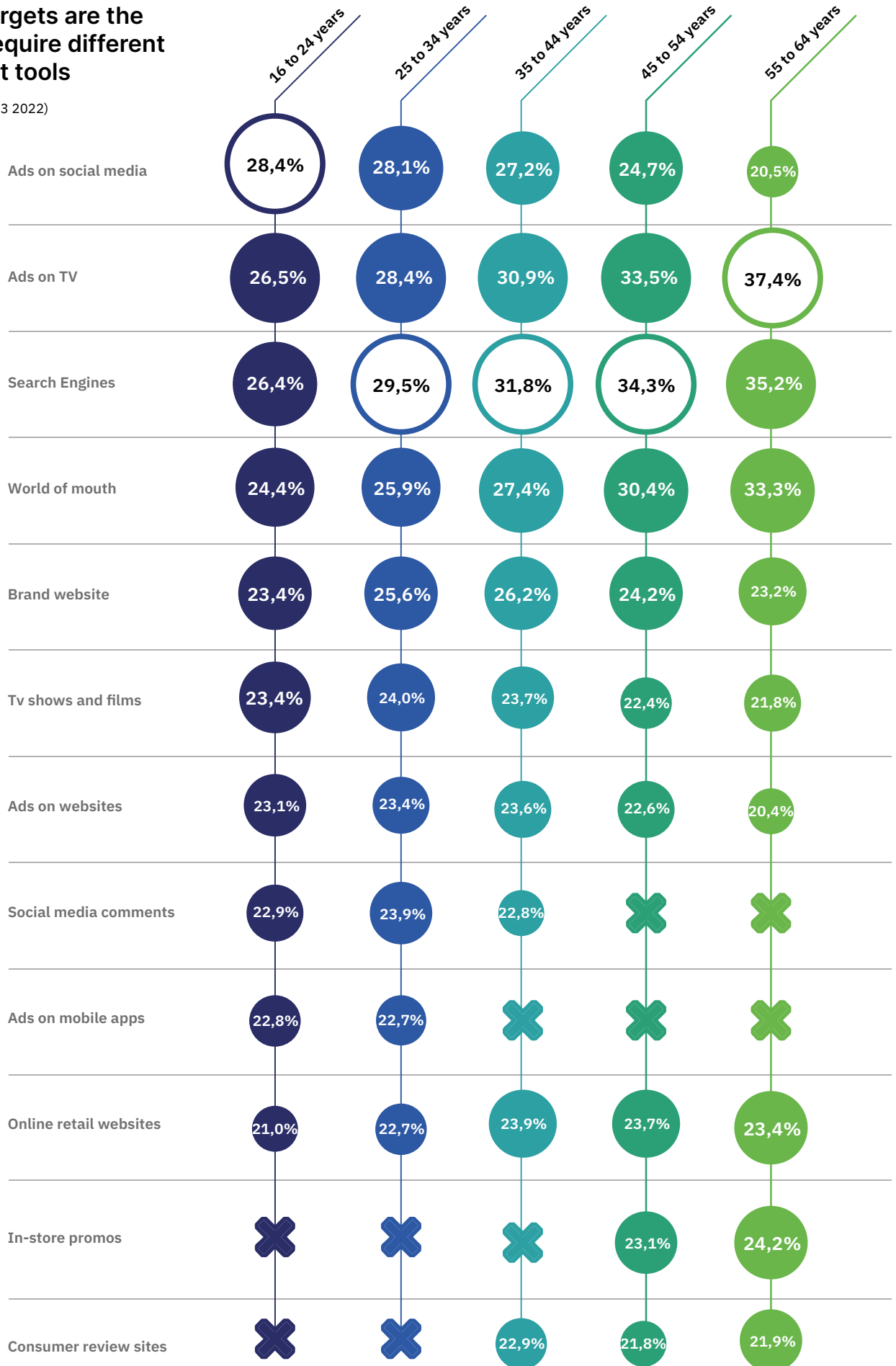


## → Global Ecommerce drivers

Graph source: Weresocial/Meltwater

→ Not all targets are the same and require different engagement tools

Graph source: GWI (Q3 2022)



## Online presence

The goodness of an Ecommerce website can be measured in particular by the metric of the conversion rate between visitors and buyers. The average conversion rate has increased in recent years up to a general Italian average of 2.1 per cent with strong differences between sectors where consumer electronics is at 0.7 per cent while sectors such as pharmaceuticals are at 3 per cent. In order to increase customer returns, several operators are expanding their range into adjacent sectors. For example, pharmaceuticals is expanding into the beauty and animal sectors to improve customer return rates to 2 or 3 times a year.

Among the tools that are doing the most to improve conversion in recent months, conversational Ecommerce stands out in particular for its extensive use of Whatsapp, initially used for customer service and now increasingly used also for proactive engagement. Using Whatsapp for managing direct conversations with customers, in fact, allows especially those with a long sales cycle to keep prospects engaged until the sale.

Retailers who have used this tool declare around 5% of turnover generated through this channel. There are success stories such as the sale of furniture on Woodboom where sending photos and immediately resolving doubts on chat made it possible to reduce time taken to sell furniture from 4 weeks to 4 days and to reach 70% of sales made through this channel.

## Online promotion

As for the online promotion of their brand, Italian companies are again finding hardship after a period facilitated by the lockdown and a demand for online goods that exceeded supply. 33% of companies surveyed claim to be satisfied and have found the right way to promote their brand (in line with last year and -15% compared to 2020). However, online promotion is still considered difficult by 56% of companies (in line with last year and +12% in 2020). 11% declared the activity unsatisfactory, as they could not find a system with a good cost/performance ratio.

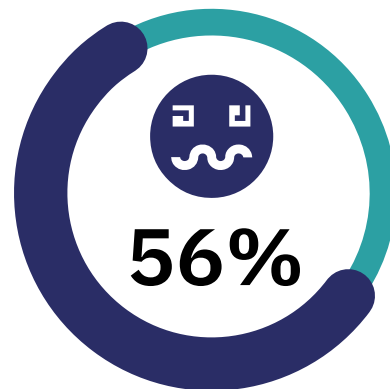
### → Online promotion remains difficult

What do you think of your brand online promotion?

Graph source: Casaleggio Associati, 2023



**Is satisfying.**  
We have found our way to best promote our brand.



**Is difficult.**  
We are constantly experimenting



**Is unsatisfactory.**  
We can't find a system with a profitable cost/performance ratio.

## Marketing and advertising activities

After the lock-down when it was easier to acquire new customers, the subject of advertising and marketing has once more become central.

The average acquisition cost in Italy is EUR 32 with strong differences between sectors.

Among marketing activities, SEM (Search Engine Marketing) continues to gather the majority of investments (24%). At the second place with 14% are SEO (Search Engine Optimisation) activities. At the third place is Social Media with 14%, followed by Email marketing with

9%, Display advertising with 6%, Comparators and Sponsorships both with 5%, Remarketing and Retargeting with 6%. Affiliation remains at 3% and Programmatic drops to 2% (from 5%).

A special note goes to TV, Radio and Print, which after dropping from 13% to 5% in 2021, and regaining share at 7% in 2021 have dropped back to 4%. Comparing the data, however, it can be seen that those investing in traditional media are mainly companies claiming they are dissatisfied with the results of their promotional strategy.

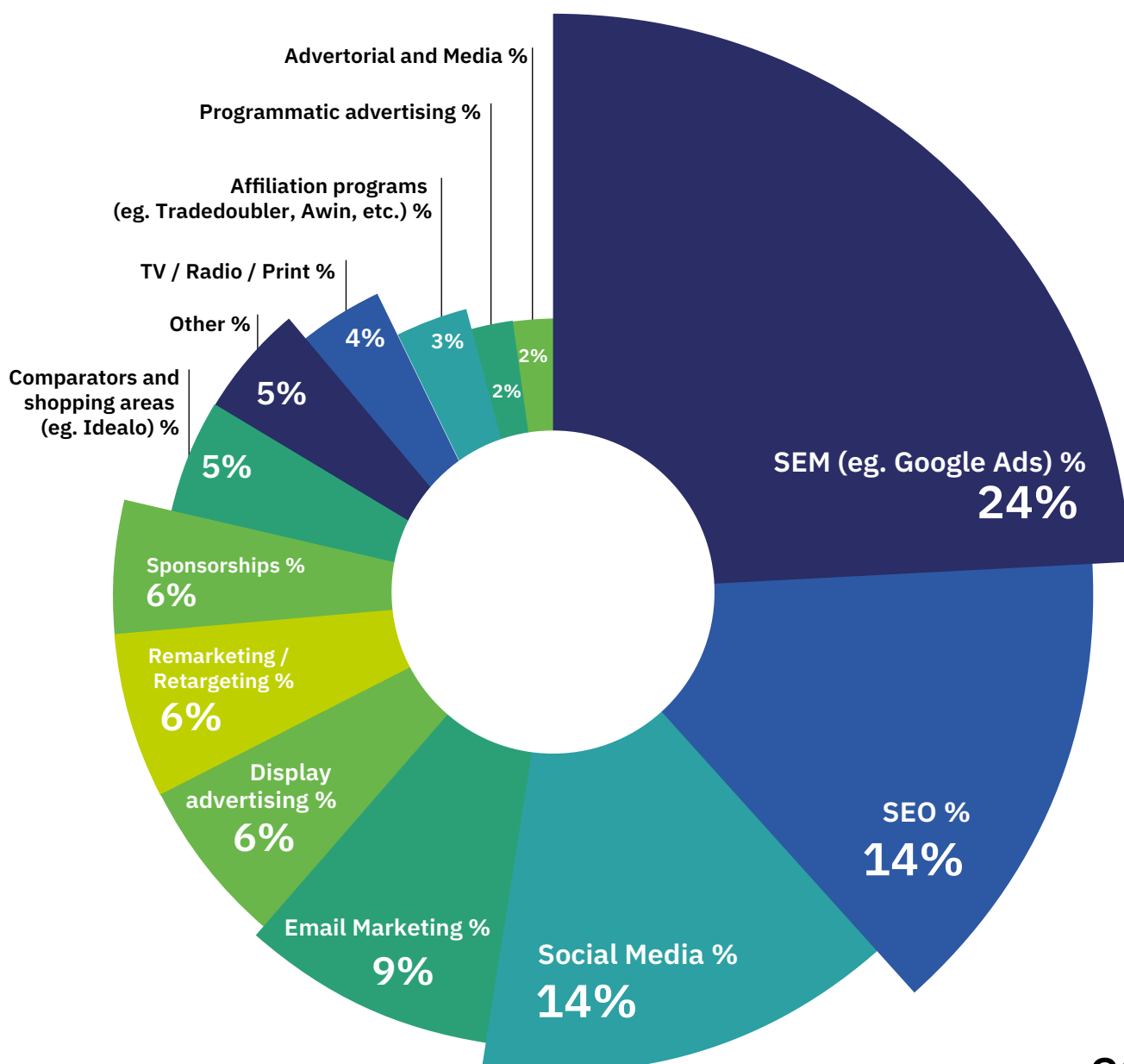
### → The Ecommerce marketing budget

What is the percentage breakdown of your marketing and advertising activities? (Multiple answer. Enter the percentage value for each business area)

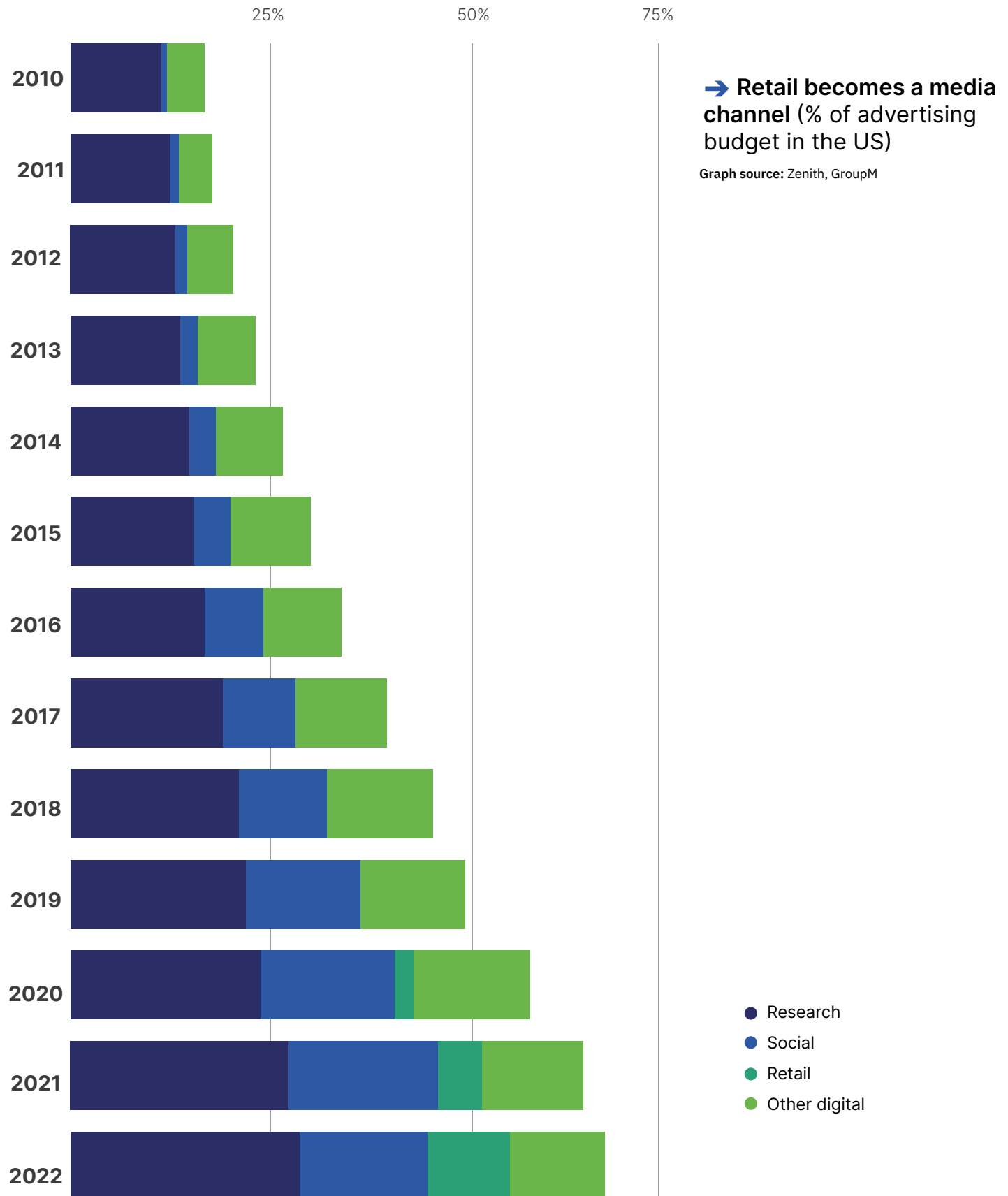
Graph source: Casaleggio Associati, 2023

The average acquisition cost in Italy is

€ 32



A particular phenomenon which has accelerated over the past year, is the advertisement repositioning on retailers and marketplaces directly. In the US, the advertising investment in retailers was up to 10% in 2022.



CHAPTER FIVE

# Selling abroad

## Strategies for foreign market presence and turnover

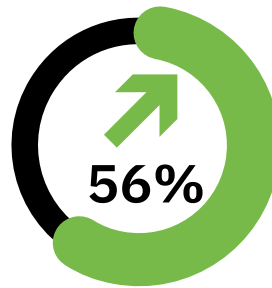
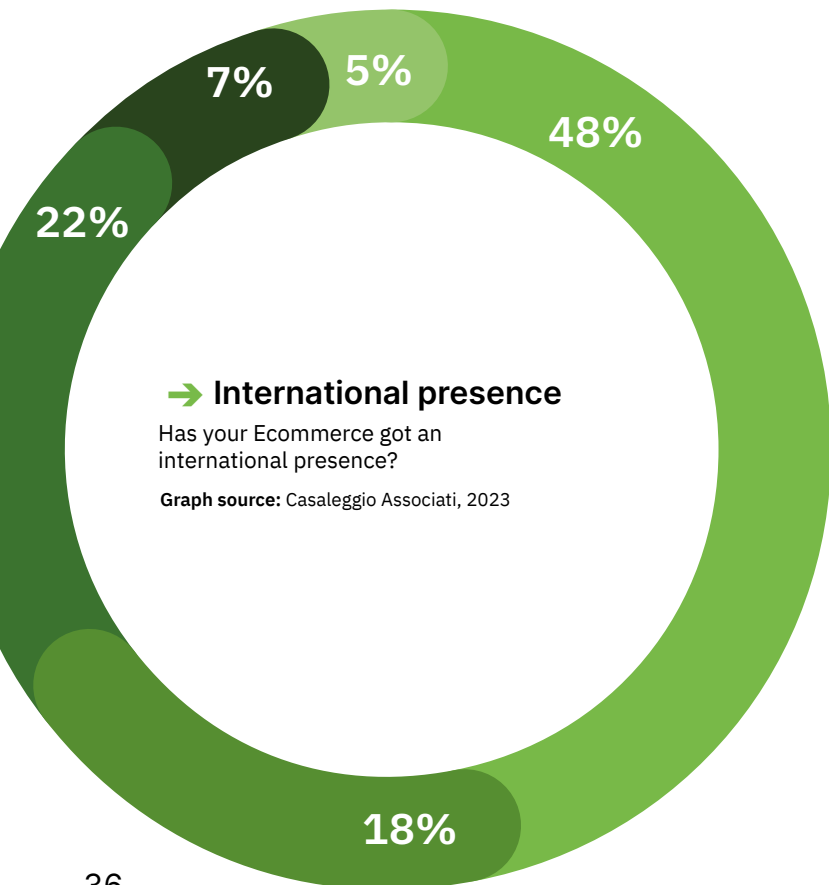
Despite the great growth of Ecommerce in Italy, online spending per capita in other European countries remains higher. In Great Britain, for example, per capita spending on many product categories remains three times higher than in Italy.

During 2022, Italian Ecommerce companies selling abroad increased and are now just over half, while 48% only sell in Italy, down from 44% last year due to the entry of new, younger operators on the market.

The main strategy for being present abroad is to create a multilingual website. Residually, some sites have adopted the strategy of a specific presence, e.g. in the US via marketplaces.

Online shopping centres and consumer electronics due to product and distribution policies are more refractory abroad. Mainly the Food and Home-Office and Furniture sectors have a stronger presence.

Turnover generated abroad accounts for 29% of the total on average. During the past year, sales from abroad increased in 56% of the companies involved in the survey, remained stable for 33% and decreased for 11%.

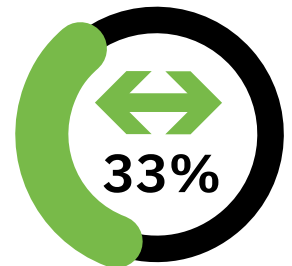


Increased

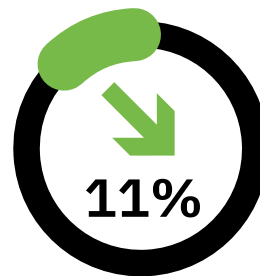
### → Foreign sales

Compared to last year, Ecommerce sales:

Graph source: Casaleggio Associati, 2023



Remained stable



Decreased

- No, we only sell in Italy (move to the following page)
- Yes, we have a strong international presence
- Yes, we have a multi language site
- Yes, thanks to marketplaces
- Other

## Foreign markets with greater presence of Italian companies

Foreign presence is becoming increasingly evident in a variety of countries.

34% of the companies surveyed are present in Germany, 31% in France, 28% in Spain, 21% in the United Kingdom, 16% Switzerland and 15% in the USA, 13% in Northern Europe, 7% in the Balkans, 4% in Latin America, 3% in Russia, 4% in Japan and China, 2% in India, 3% in other Asian countries and 2% in Africa.

Russia stands out the most, which fell from 8% to 3% in one year mainly due to the war and sanctions that made sales more difficult, and the Balkans which returned after a surge in sales during the lockdown to 7% in line with pre-pandemic penetration, probably indicating a recovery of domestic retailers in their own market. 2022, however, was a challenging year to succeed in international sales if based in Italy due to transport costs. Operators with logistics bases already distributed externally, therefore experienced significant growth in this industry.

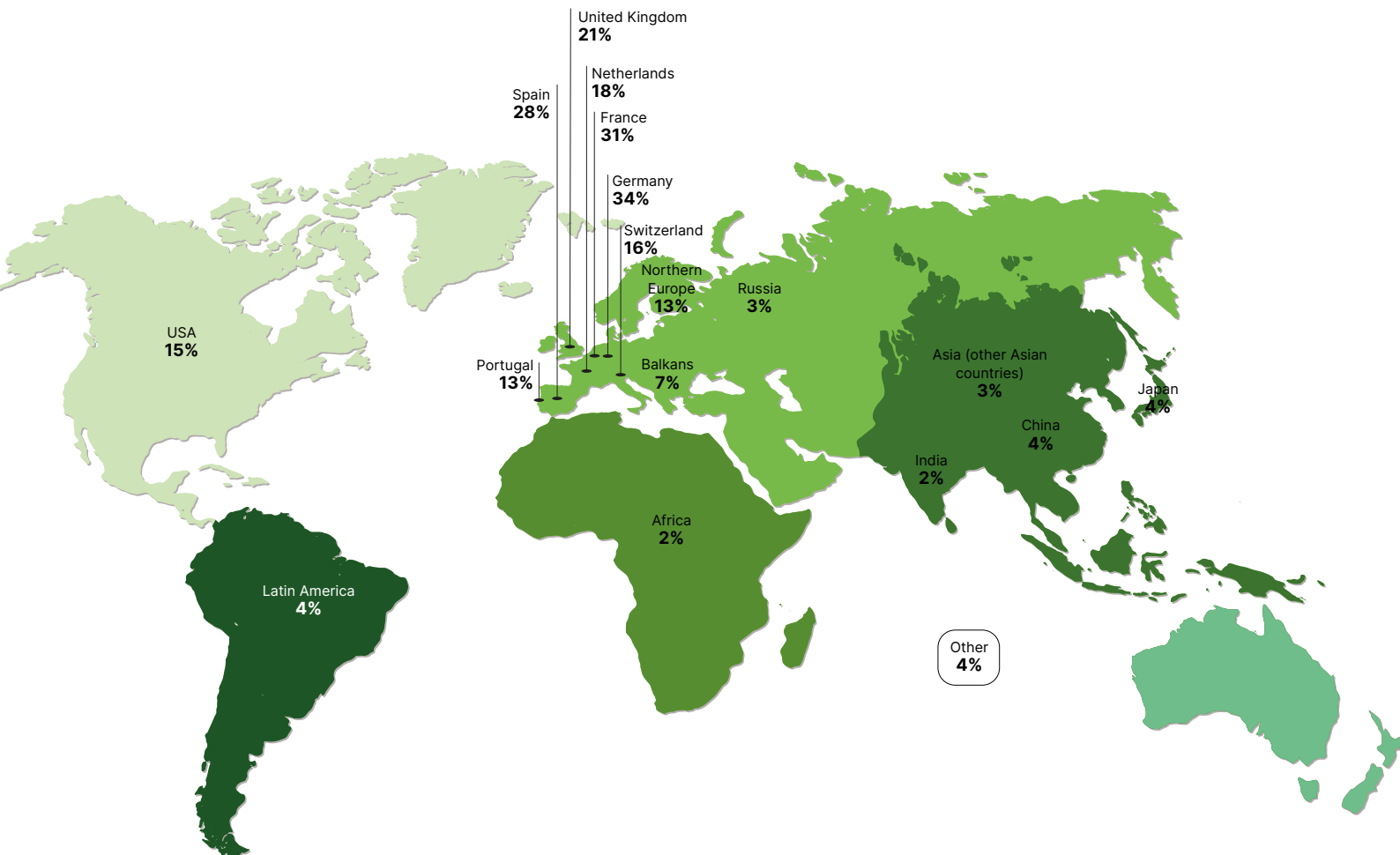
**Germany (34%),  
France (31%) and  
Spain (28%)**

are the countries where Italian producers mainly export.

### → Top countries for Ecommerce export

What other nations/areas, apart from Italy, do you sell online to?

Graph source: Casaleggio Associati, 2023



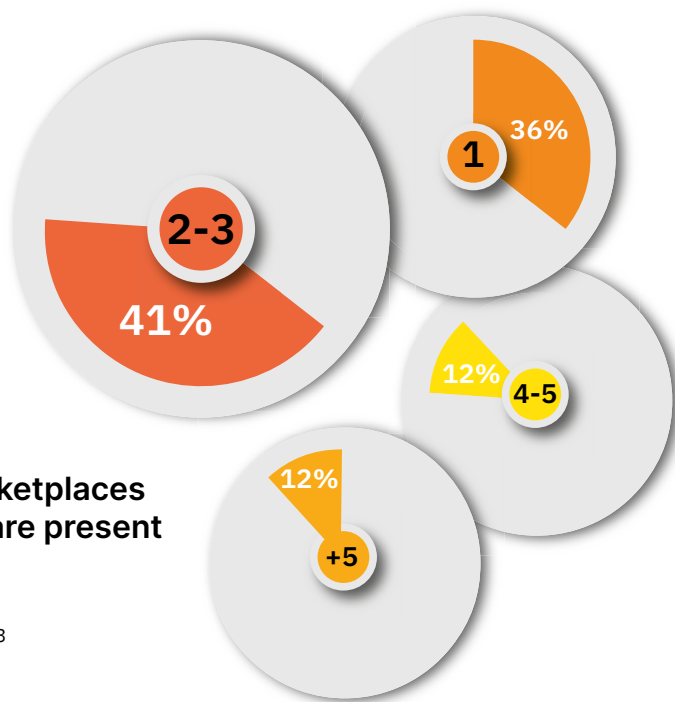
CHAPTER SIX

# Selling on marketplaces

## Strategies for foreign market presence and turnover

65% of the surveyed companies also claim to be present on at least one marketplace. This number is definitely increasing from 49% in the previous year.

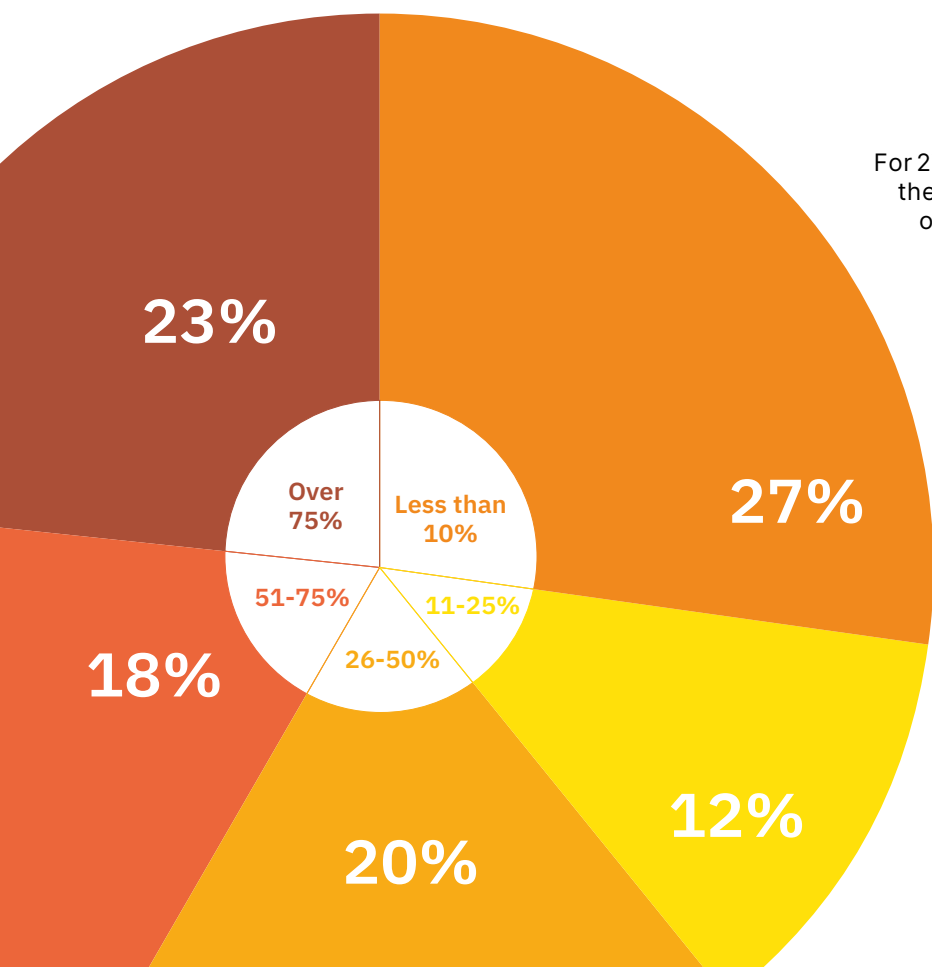
Over the past year, there has been a rationalisation of the number of marketplaces in which companies are present, with 46% of companies stating that they use only two or three platforms. Limiting more than others the number of marketplaces in which to be present are mainly companies in the Fashion and Consumer Electronics sectors.



→ **The number of marketplaces on which companies are present**

How many marketplaces are you present on at the same time?

Graph source: Casaleggio Associati, 2023



For 27% of the companies that sell using marketplaces, these latter account for less than 10% of their turnover. For 12% of the companies, they account for 11 to 25% of turnover. This is followed by 19% of companies with an incidence of 26-50% of turnover, 18% have an incidence of 51 to 75%. In contrast, 23% (sharply increasing from 9% of last year) have an incidence of more than 75%. The leisure and home-office furnishing sectors are those limiting sales on marketplaces the most.

→ **Turnover via marketplaces**

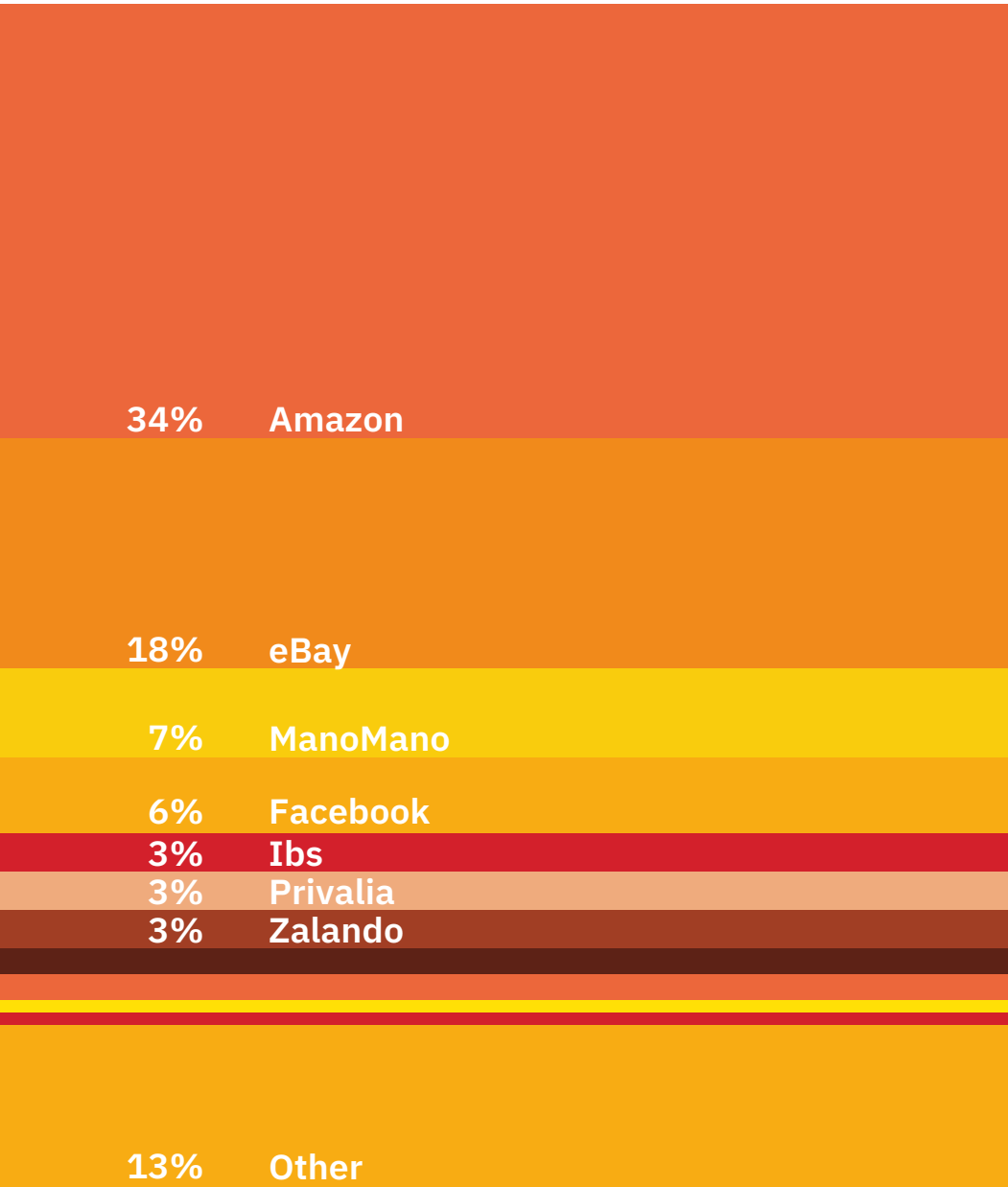
What percentage of online sales come from marketplaces?

Graph source: Casaleggio Associati, 2023



Taking this plurality of presences into account, the most popular marketplaces include Amazon (34%), eBay (18%), ManoMano (7%), Privalia (3%), which has fallen sharply since last year, Facebook (6% compared to 12% last year), E-price (2%), Zalando (3%), IBS (3%), Alibaba (1%), Aliexpress (1%) and Etsy (2%). Also joining the other marketplaces mentioned by many are: Leroy Merlin, Decathlon and Kasanova.

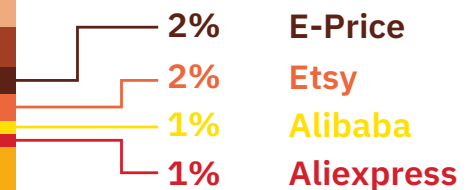
Service evolutions on marketplaces are evolving more and more. In the United States, for example, with Buy with Prime, Amazon has initiated logistics and payment as a service. Companies will be able to use their own sites directly, but with the new services they will be able to store and deliver products and manage payments.



→ **Most used marketplaces**

What marketplaces do you use?  
(Multiple answer)

Graph source: Casaleggio Associati, 2023



The presence of sector-specific marketplaces also opens up a crucial pricing issue. Thanks to an analysis by Skipper ([skpr.it](http://skpr.it)) which examined the pricing of the same products in different product contexts, it is evident that selling a product within a different sector allows for completely different margins.<sup>16</sup>

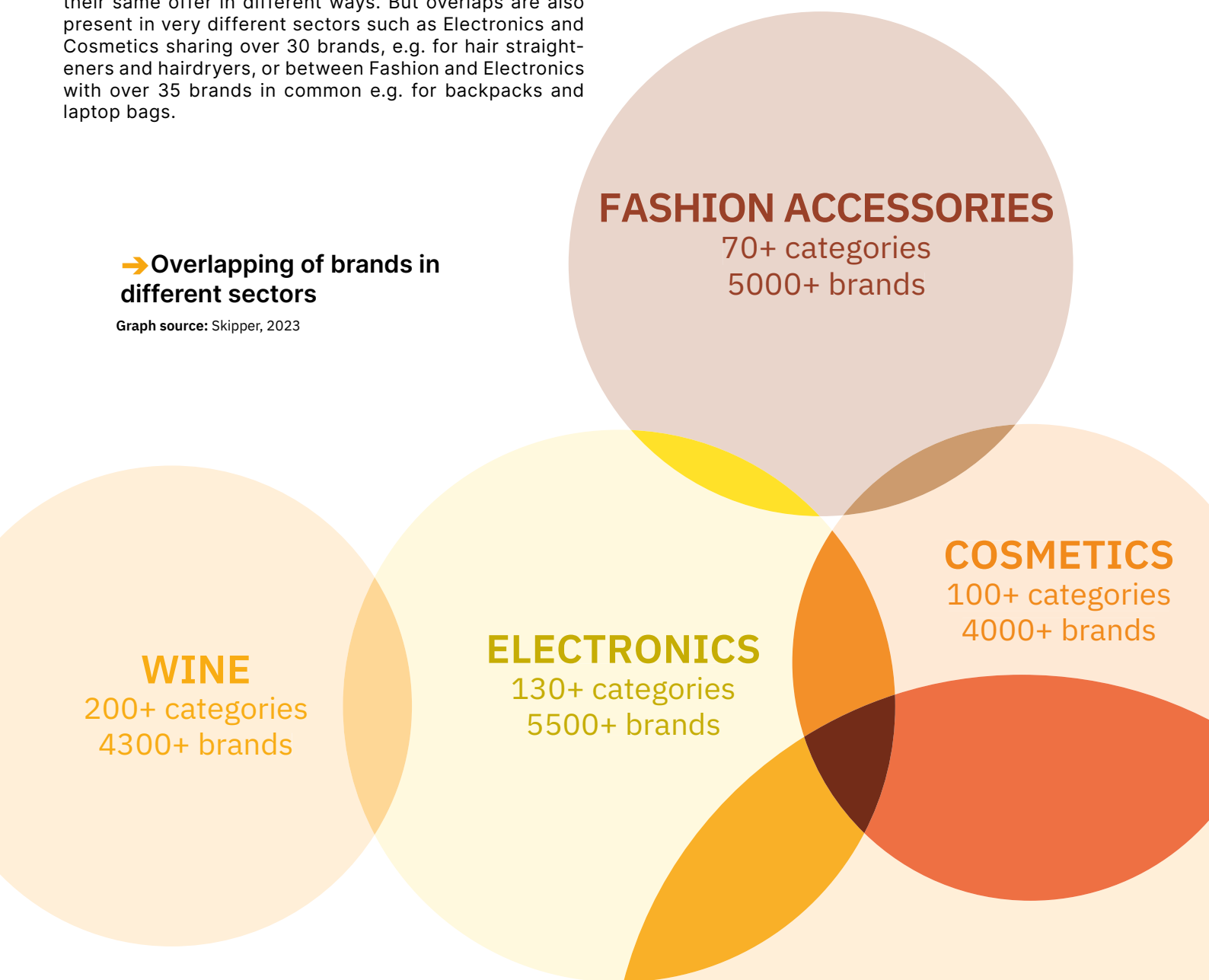
For example, in the Cosmetics and Pharmacy industries, common products see differences of between 10% and 24% always in favour of the Cosmetics sector. What makes these important price differences possible is the competitive pressure both in general with respect to the number of players and in particular with respect to the particular product offered.

16: The survey was carried out on a basket of 4,000,000 offers available online in March 2023


Sharing the same products in different sectors is common in almost all industries. For example, between Pharmacy and Cosmetics over 140 brands are shared, promoting their same offer in different ways. But overlaps are also present in very different sectors such as Electronics and Cosmetics sharing over 30 brands, e.g. for hair straighteners and hairdryers, or between Fashion and Electronics with over 35 brands in common e.g. for backpacks and laptop bags.

→ **Overlapping of brands in different sectors**

Graph source: Skipper, 2023



difference **10,91%**

	<b>PHARMACY</b>	<b>COSMETICS</b>
	21,14€	24,13€

difference **13,7%**

	<b>PHARMACY</b>	<b>COSMETICS</b>
	44,39€	51,49€

difference **24,5%**

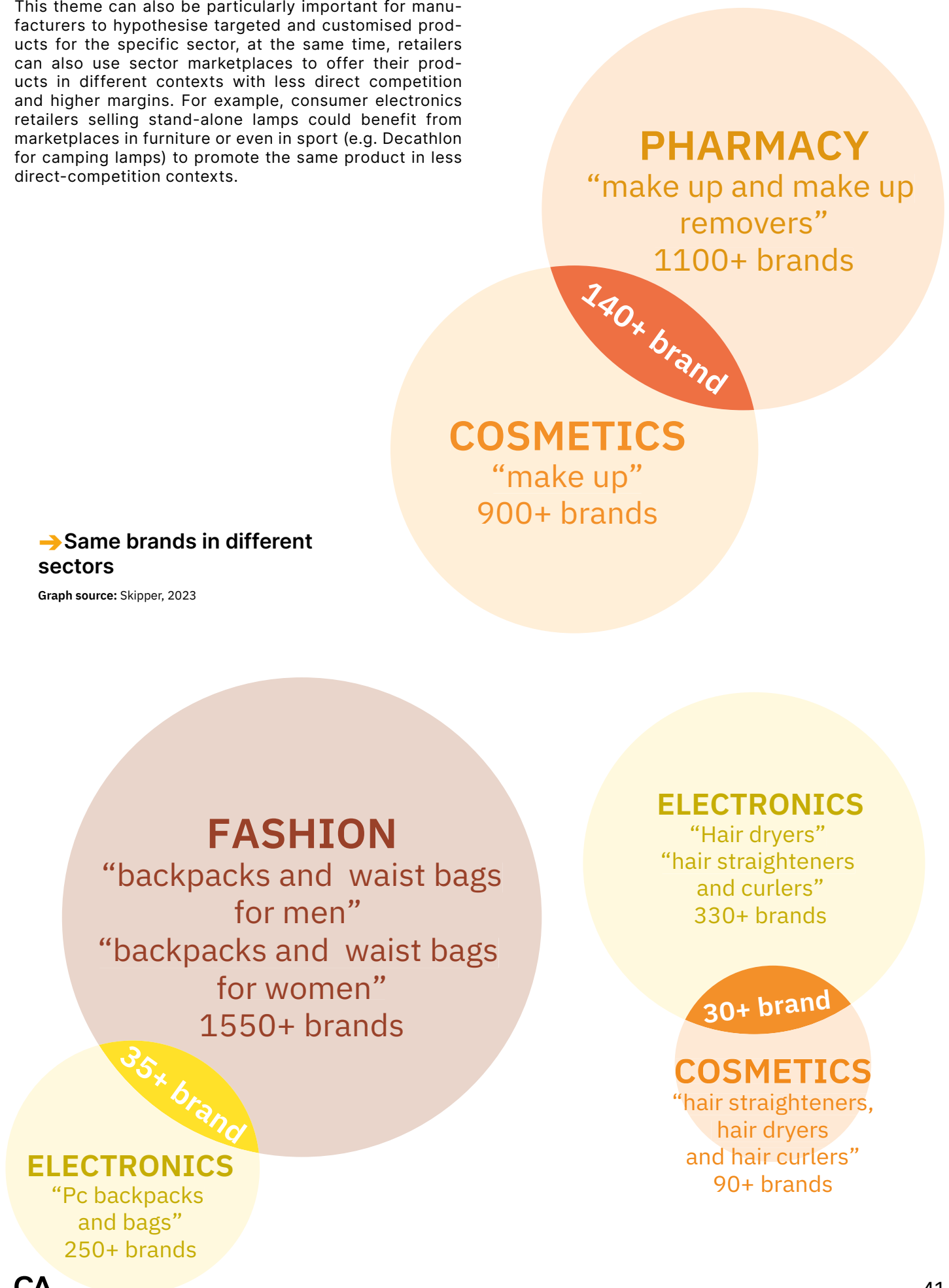
	<b>PHARMACY</b>	<b>COSMETICS</b>
	17,29€	22,92€

**PHARMACY**  
120+ categories  
11500+ brands

This theme can also be particularly important for manufacturers to hypothesise targeted and customised products for the specific sector, at the same time, retailers can also use sector marketplaces to offer their products in different contexts with less direct competition and higher margins. For example, consumer electronics retailers selling stand-alone lamps could benefit from marketplaces in furniture or even in sport (e.g. Decathlon for camping lamps) to promote the same product in less direct-competition contexts.

→ Same brands in different sectors

Graph source: Skipper, 2023



CHAPTER SEVEN

# Social media

## Italian companies' favourite social networks

Among the most effective social media for Ecommerce, Facebook (37%) has fallen in the rankings, overtaken by Instagram (48%) for two years now and Whatsapp Business (31%).

Whatsapp Business requires specific knowledge to be used, which is different from other social media, and this creates a strong dichotomy between those who find it effective and those who do not. This is followed by YouTube in strong growth (25%), Tiktok (23%), Pinterest (11%), Linkedin (5%), WeChat (4%), Twitch (2%) and Sina Weibo (2%).

# Instagram

is the social preferred by companies

## Social Media and ROI

The perception of social media effectiveness in terms of return on investment remains complicated for the Italian Ecommerce companies surveyed. The higher the number of social media, the higher the management complexity. This is also why we still remain in the realm of experimentation and even measuring results is a matter of debate.

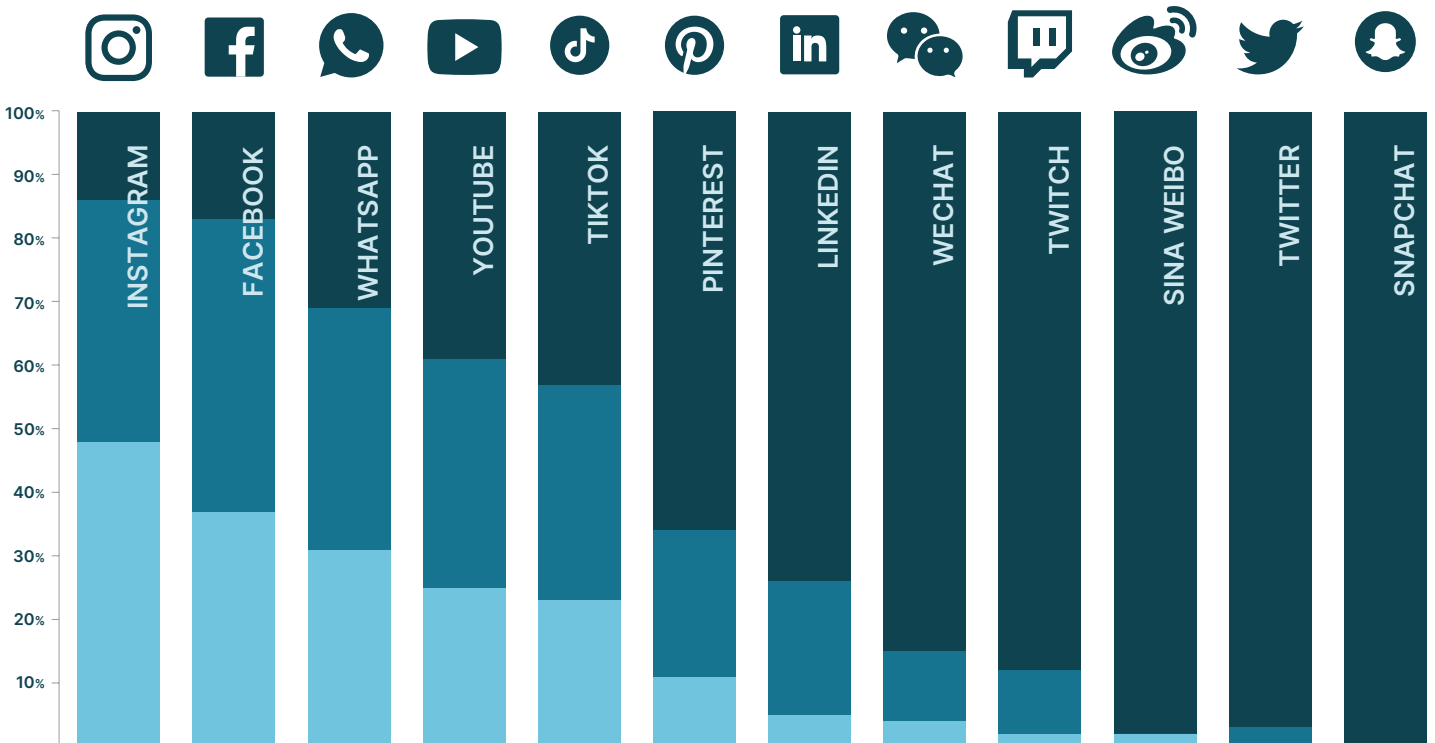
Only a third (up sharply from last year where it was only a quarter) of companies consider themselves satisfied with the performance on social media, another fifth consider it completely unsatisfactory and the remaining half are struggling to find a solution.

### → Most effective socials

Which social media do you think is the most effective for your business?

Graph source: Casaleggio Associati, 2023

● A lot   ● Enough   ● Little



### → Social media advertising remains difficult

What do you think of the social media marketing activity in terms of sales and ROI?

Graph source: Casaleggio Associati, 2023



**Satisfying.**  
We identified activities on social media that allow for higher sales



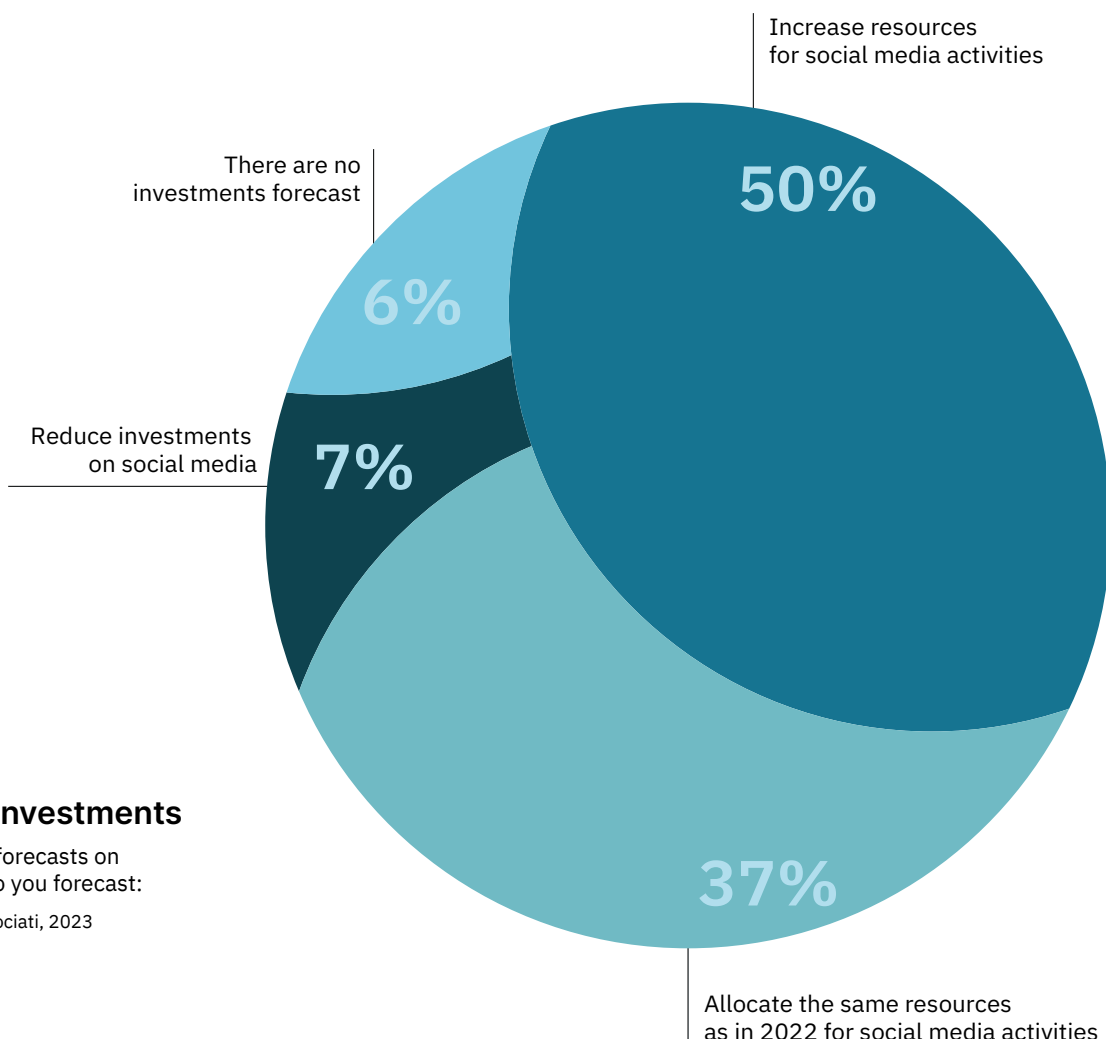
**Difficult.**  
We haven't found a suitable measurement method to assess the impact of social media marketing activities on sales

### Social media investment forecasts

50% of Italian companies want to continue investing in this channel by increasing their investments compared to the previous year (-5% compared to the previous year and -9% compared to two years earlier). The number of Ecommerce companies that decided to keep their investment constant (37%, +5% since last year) is increasing, in favour of more allocated resources to social media. The percentage of companies that will reduce their investment this year is also increasing (7%). By contrast, the number of companies planning not to invest in social activities during 2021 remains fairly constant (6% compared to 8% last year).



**Unsatisfactory.**  
The activities on social media have a poor impact on sales



### → Social media investments

What are the investment forecasts on social media for 2023? Do you forecast:

Graph source: Casaleggio Associati, 2023

## CHAPTER EIGHT

# Organizational structure

The strong acceleration of the Ecommerce sector in the last two years has led to a questioning of the internal corporate organization.

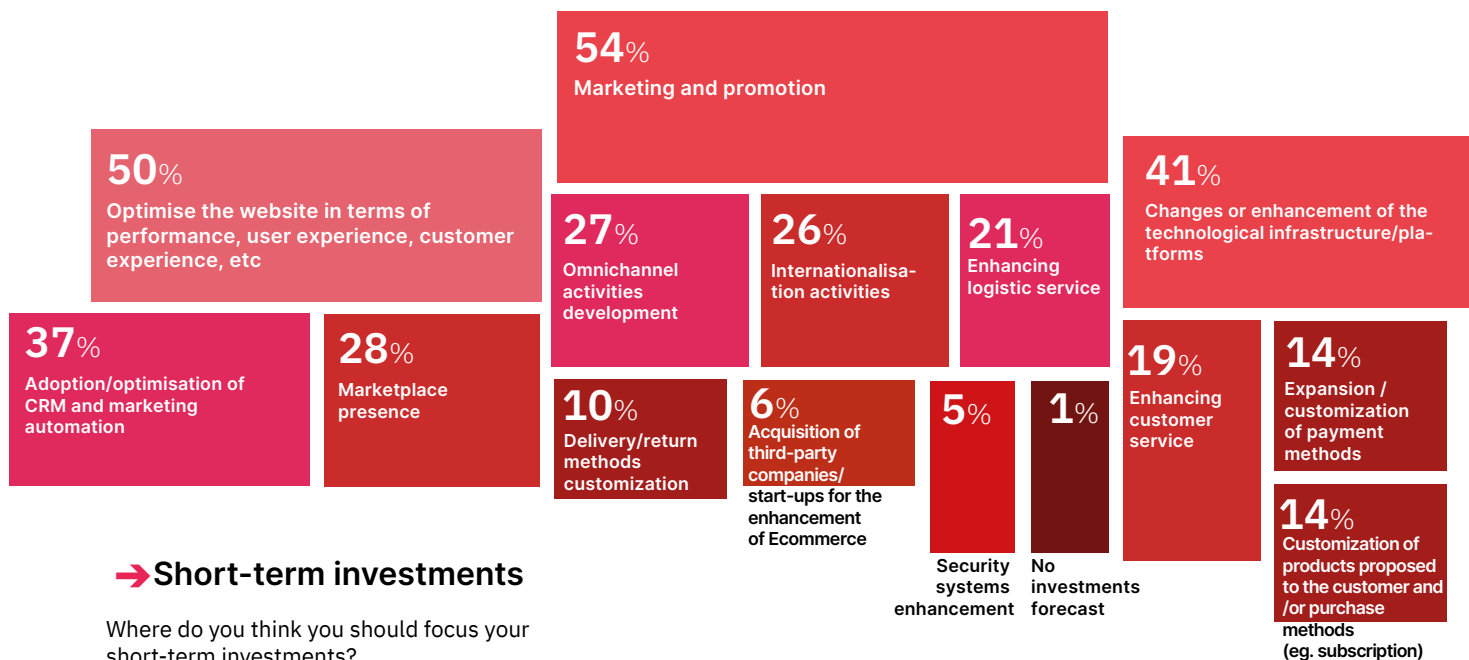
## Short-term investments

Just like last year, Italian Ecommerce companies plan to invest mainly in marketing and promotion (54%) in the short term. In second place, as in the previous year, are investments aimed at improving the performance, usability and user-experience of the website (50%), while in third place are investments aimed at improving the technological infrastructure (for 41%). The adoption/optimisation of CRM and marketing automation are planned by 37% of companies.

Marketplace presence and logistics service enhancement are envisaged as investments by 28% and 21% of the Italian companies surveyed, while foreign sales activity by 16%.

According to the survey, 19% foresee investments for the inclusion or enhancement of customer service/care as well as for the customisation of the products offered to the customer and/or the purchase method.

This is followed by companies that plan to allocate budgets to the customisation of delivery and return methods, the expansion and customisation of payment methods, and the acquisition of third-party companies or start-ups for the enhancement of Ecommerce and security systems.



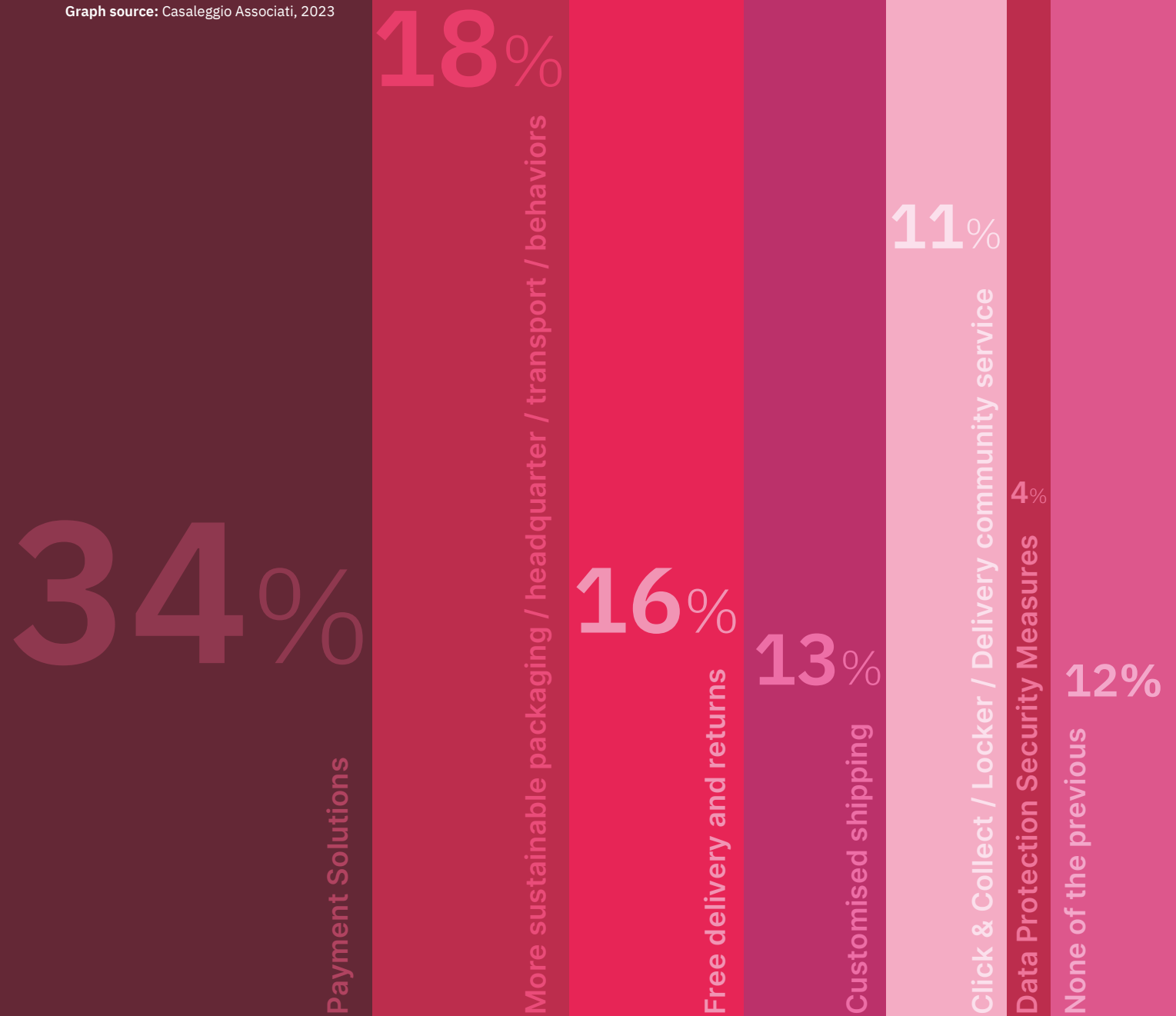
Graph source: Casaleggio Associati, 2023

The organizational structure will be expanded by Italian Ecommerce companies mainly in terms of Payment Solutions (34% down from 48% last year), Free Shipping/Returns (16%), More Sustainable Packaging/Shipping/Transportation/Charges (18%), Customised Shipping (13%), Click & Collect / Locker / Delivery community service (11%) and Data Protection Security Measures (4%). Those most interested in payment solutions are, in particular, companies in the shopping centres, home-office, furniture and fashion sectors.

→ Strategies to increase sales

Which strategies do you / will you implement to increase online sales? Extension of: (Multiple Choice)

Graph source: Casaleggio Associati, 2023



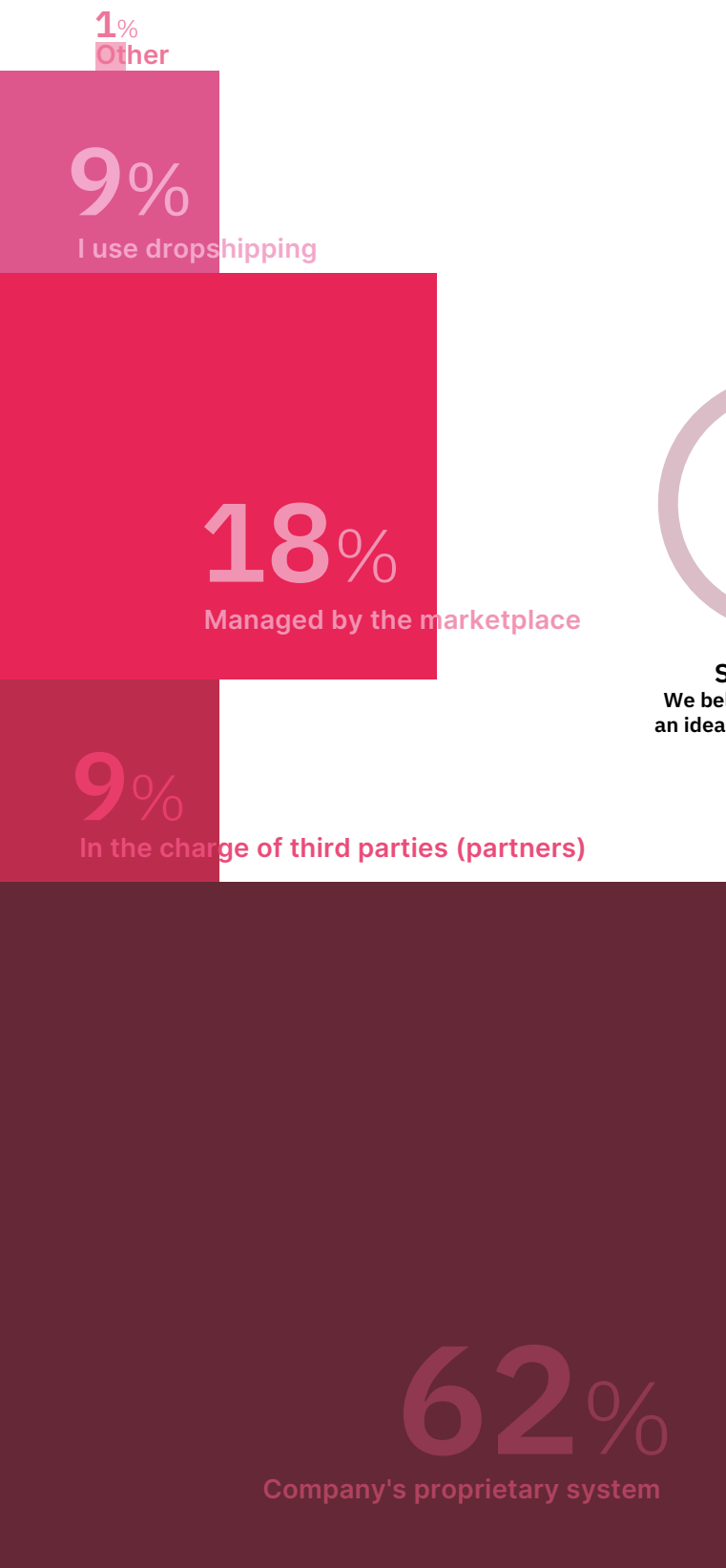
## Logistics

Operators who have consolidated their online offerings are now planning same-day delivery in major Italian cities such as Milan, Rome, Naples and Turin.

### → The warehouse still remains in the company

The warehouse management is:

Graph source: Casaleggio Associati, 2023



Shipping services have come under pressure in the last two years. Logistics in most cases still remains in the company. However, there has been a sharp increase in the last three years (from 2% to 10% to 18%) of companies entrusting their logistics to marketplaces (especially Amazon), which can probably also be linked with an increase in satisfaction (from 25 to 36% to 41%) with the shipping service.

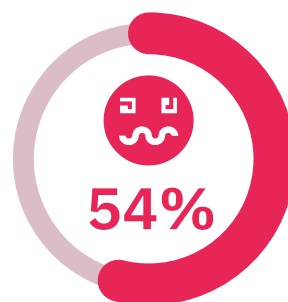
### → Shipping service has room for improvement

How do you evaluate the service offered by your suppliers for the shipment services?

Graph source: Casaleggio Associati, 2023



**Satisfying.**  
We believe we achieved an ideal quality/cost ratio.



**Improvable.**  
One or more suppliers are not up to our needs.



**Unsatisfactory.**  
We will soon change one or more suppliers.

In order to finance an increasingly fast (and therefore expensive) service, the average shipping price increased to EUR 10.59 compared to EUR 8 last year.



## Digital payments in Ecommerce

Once again this year for Italian Ecommerce companies, credit cards are the most popular payment method (37%), followed by digital wallets (27%) and bank transfers (10%). Cash on delivery is stable (9%).

Precisely payment on delivery remains a continuous surprise for operators offering it. For example, it accounts for almost 50% of orders for garden products, equal to countries such as Romania where the culture of wanting to see the product before paying for it is still strong. Even in sectors such as pharmaceuticals, those who offer this as a service see 10-15% of transacted business in this channel. On car parts, the percentage can be as high as 20%.

By 2023, a significant increase in electronic wallets can already be expected. Worldwide, electronic wallets (used for 45% of online purchases) have in fact far surpassed credit cards (32%), which nevertheless still remain important<sup>17</sup>. In Italy, in fact, 57.9% of people over the age of 15 own a credit card compared to 82.3% with debit cards<sup>18</sup>.

A phenomenon that is beginning to penetrate Italian checkouts is also the charity add-on. Indeed, leveraging social impact as a sales differentiator is 13 times more effective than traditional sales incentives such as free shipping or discounts<sup>19</sup>. Financially supporting impactful projects promoted by non-profit organisations within Ecommerce, while also involving customers, is also welcomed by consumers who, in 34% of cases, believe

that “doing good while shopping is a great idea”. On the other hand, 45% find it interesting in some cases<sup>20</sup>. According to data from Italian start-up Cents, people who interact with a donation solution at check-out or on the shopping cart page complete orders 30% more often than those who do not interact with it, leading to improved order completion rates<sup>21</sup>.



### → Distribution of payment methods

What is the percentage distribution of the following paying methods? (Indicate % value on your total sales)

Graph source: Casaleggio Associati, 2023

<sup>17</sup>: PPRO, on 2021 purchases; <sup>18</sup>: Banca Mondiale, 2023; <sup>19</sup>: <https://www.forbes.com/sites/forbesbusinesscouncil/2020/08/20/leading-sales-and-social-impact-in-times-of-crisis/?sh=5070126c6687>; <sup>20</sup>: Donare 3.0 - Doxa, PayPal, Rete del Dono; <sup>21</sup>: Data collected on a sample of 1,500 orders, Cents S.r.l.

## The Ecommerce manager

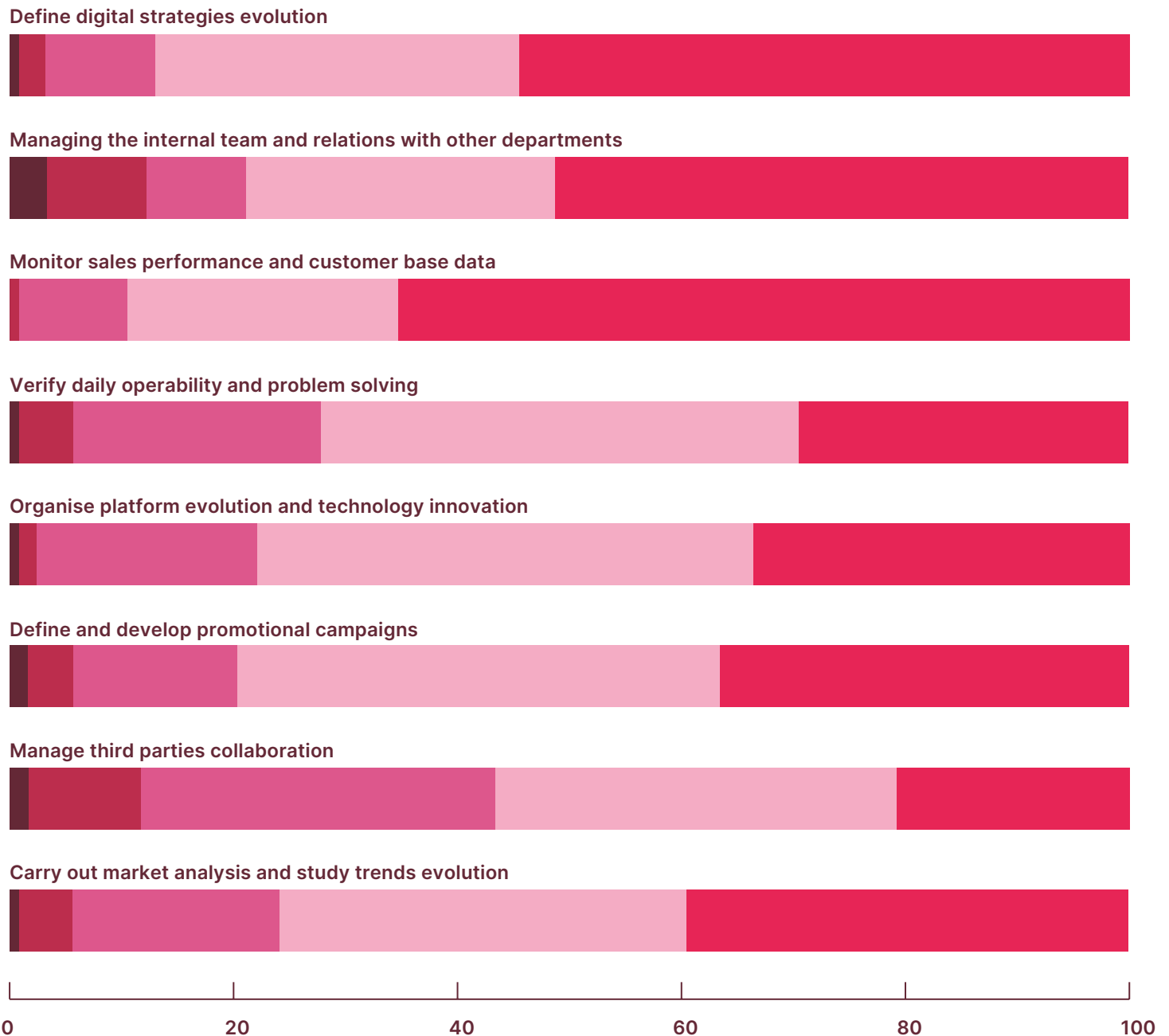
The main activities of the Ecommerce manager today are sales-oriented such as monitoring sales performance and customer base data (65% of Ecommerce managers consider this to be very important), but include numerous other activities such as defining the evolution of digital strategies (51%), managing the internal team and relations with other areas of the company (51%), defining and evolving promotion campaigns (36%), organising the evolution of the platform and technological innovation (34%), carrying out market analysis and studying the evolution of trends (39%), verifying daily operations and problem solving (29%), and managing collaboration with third parties (21%).

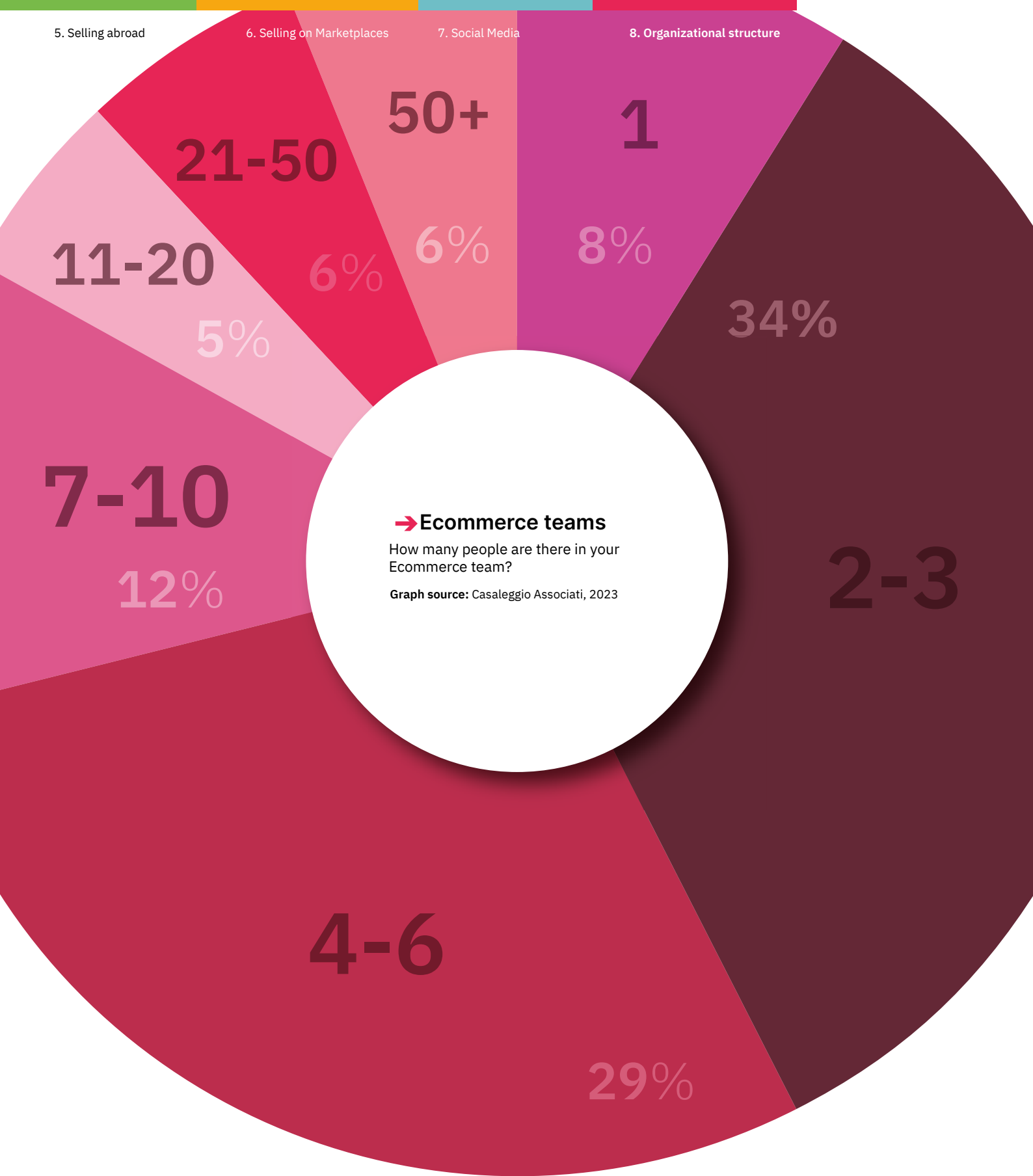
### → Ecommerce manager's activities

How relevant, from 1 to 5, are the following activities in the Ecommerce manager role? (Insert a value from 1 to 5 where 1 is little important and 5 is very important).

Graph source: Casaleggio Associati, 2023

● Not at all ● Little ● Enough ● Quite ● Very





With the increase in turnover and the internal weight of the Ecommerce division in companies, in many cases there have been organizational restructurings in order to better integrate digital activities with the rest of the company. Alongside this, there has also been an increase in the number of staff in the team, which on average is under six people.

## Method

The XVII edition of the Report “Ecommerce in Italy” was created through investigations and market research, news articles and experience on the field by Casaleggio Associati, and also through 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, Ecommerce managers and Internet managers.

The companies examined are Italian or Italian branches of multinational groups.

The survey, carried out between January and March 2023, looked at a sample of approximately 3,000 Ecommerce companies. The companies that contributed to the research through interviews and surveys are 226. All data presented refer to the Italian business-to-consumer market.

### Goods and services sectors



#### FOOD

Food, beverages, supermarkets, restaurants



#### INSURANCE

Car, motorcycle and home insurance



#### HOME AND FURNITURE

Furniture and home and garden items



#### MARKETPLACE

Varied products, Ebay (B2C)



#### PUBLISHING

Home videos, books, music, software, information



#### CONSUMER ELECTRONICS

Domestic appliances, Hardware, Telephony, Photography, Audio



#### FASHION

Clothing footwear, jewelry, glasses



#### HEALTH AND BEAUTY

Perfumes, cosmetics, wellness, medicines



#### LEISURE

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



#### TOURISM

Transport, hotels, tour operators, attractions

## Casaleggio Associati Ecommerce Ranking:

The ranking aims at assessing Ecommerce websites popularity in Italy. The calculus is based on the algorithm outlining the monthly Ecommerce Ranking, which analyses the following data:



**Single Visitors:** total number of single visitors on a monthly base in Italy (Casaleggio Associati evaluation on Semrush data)



**Online popularity:** brand relevance according to CA data and evaluation (non-visible data).



**Average time:** the average time spent on the analysed domain during each visit



**Bounce rate:** percentage of visitors leaving the website after viewing only one page.



**Relevance:** overall score calculated on the basis of previous data, through the algorithm we constantly improve.

The ranking has no statistical value but is indicative of the existing balance of power between the various players according to the parameters defined by Casaleggio Associati. Apps data are not currently taken into account.

### Choice of the winning companies

In order to determine winners, the data related to Casaleggio Associati's “Ecommerce Ranking” on an annual basis was analysed and the appropriate corrections were made to avoid discrepancies and obtain a ranking that reflected the positions which emerged throughout 2022.

### Fastest Growing Ranking

The ranking was created by aggregating three different factors: overall growth in terms of positions climbed, relative growth based on the value of climbed positions and the increase rate in single visitors year on year.

Follow the updated ranking on

[www.ecommerceitalia.info/e-commerce-ranking](http://www.ecommerceitalia.info/e-commerce-ranking)

# Organizations interviewed

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

Aosom Italy, Farmae, Samsung, Leroy Merlin, Kiko, Norauto, Mondo Convenienza, Airbnb, Agimeg, Zara, Trenitalia, Gioiapura, Strumenti Musicali, Everli, Lego, Vivaticket, Stripe, Charles, idealo, Vtex, Viceversa, Doofinder, Clearpay, Call2Net, Decathlon, Pomellato, Italiana Confetti Maxtris, Redcare, Easyfarma.it, Farmahealth, Lacertosus, xfarma.it, Casa Vinicola Zonin, Gardini per Arredare, Onlywood, Farmacie Italiane, Manetti & Roberts, Assicurazioni Online Verti, ManoMano, Electrolux, Loacker, InBagno, Baldinini, Maury's Online, Caffè Mada, G-Twins, F.Ili Campagnolo, Ecoartigianato di Silvia Bertolucci, Sportrairie, Catistore, Foxydry, Paideia, RemediaLabs, Akida, ge.mi. di Miranda Gennaro, TAG, Erresse Shop, Blu Fox, Tuttoverde, Kraft Heinz, MJ Italian Fashion, Mediaworld, PittaRosso, Vittorio Citro, Imperial, GBfoods, Kickoff, 101Caffè, Jvckenwood Italia, Fly4you, Prenatal, Estée Lauder Companies, For Hotel, EM Hub, Bios Line, Morellato, Tre Pi Profumerie, GBS, Venchi, Esagono, Whirlpool Italia, Feronia Italia, Winbet365, Family Nation, Idee Ago e Filo, Mobilize Financial Services Renault Group, Legami, Maat Cosmetici, VSD Italia, Caleffi, GT Ricambi, Conforama, Castelli Cartoleria, Libreria Mazzini, Madricarts, Bottega Sicana, DIB, ilGustonline, Ditta Baresi

Pierangelo, LML Company, MV Comfort, Parterre, Emozioni Quotidiane, Adecco, Lefas, FRMODA, Marino Andrea Tarasconi, Francegaglia, Dainese, Tentazione Calzature, Greek Flavours, FlixBus Italia, Verde!, Franchini Group, Signify Italy, Genuino.Zero, Japal, Parmaitaly-shop srl, E-typico, Allodi, Monclick, Vallesi, eFarma Group, Cegua, Gioielleria Amadori, AgriEuro, Bticino, Alba Tartufi, Inglesina, Fair Line, Coltelleria Collini, Giglio Group, Italweber, Dadart, Idrocentro, Lorenzo Costa fu Eugenio, NewAge, Reschimica, Castellani, Balato, Meeting Group, Calligaris, Ecobaby, NegozioDelVino, AgriEuro, Easy Rider, DML, Vidienne, Farmacia D'Aniello, Fabbri 1905 S.p.A., Fortuni, Dr.Max, Casa del Modellismo, Krino, My Travel Bag, Entroterra, Fashion Commerce, Pelletteria Marant, Necchi Italia, Shop Piemonte, Ausilium, Franco Cuomo Gioielli, Outlet Caffè, Perrigo Italia, Coca-Cola HBC Italia, Ressa Servizi, Nutribees, Edilportale.com, Kellogg's, Generalimport, Pettenon Cosmetics, Andy, Momoka, Peressini Casa, Gianluca Mech, PepeGusto, E-good things, Alkemilla Eco Bio Cosmetic, Gruppo Adam, Malianta, Viatris, Farmacia Bolli 1833, Cavalleria Toscana, Pavipro, Jinnone.com, CentroVete, Oise Art Store, CoccoleBimbi, Duke, Wineshop.it, La Feltrinelli, Doppelganger, Scalia Group, Mimanera, Postalmarket, Tecno Wood, Monditalia, Nid Soc. Coop.

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