

ECOMMERCE & SEARCH ENGINE MARKETING IN ITALY

Internet usage in Italy

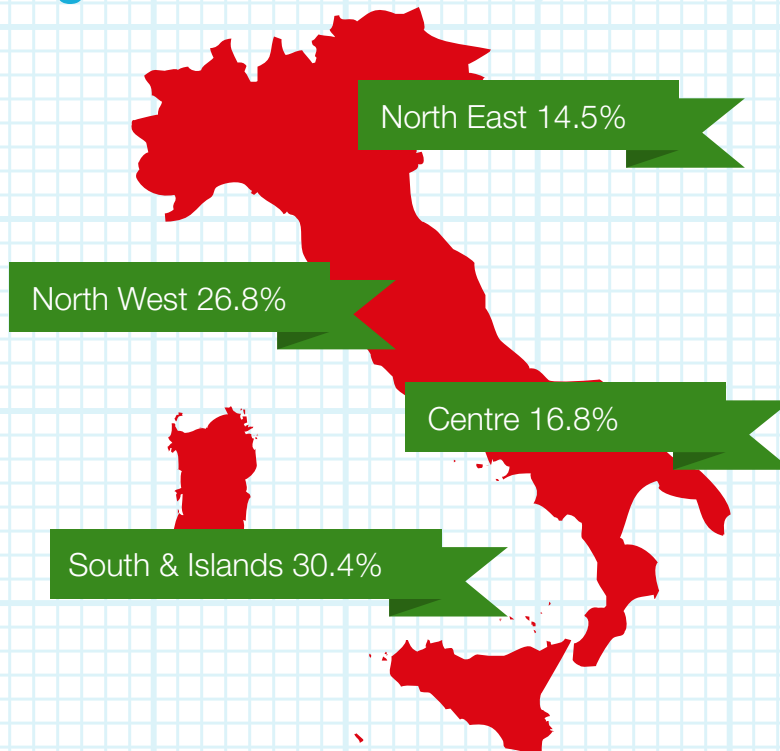
63% of Italians are online, using the web on average 1.35 hrs/day

90.4% of young people (16-24 year olds) are online

- 37.8 million people use the Internet in Italy
- Smartphone connections represent 23.5% of the total
- There has been a 12.2% increase in smartphone usage in the last year. Traffic from mobile is up 16-fold
- Italians spend an average of 4.7 hrs a day online (desktops) and 2 hrs (mobile)
- There has been an increase from 7.8% to 13.9% in terms of people using tablets to access the web over the last year
- 9 out of 10 users use Google to search
- Bing and Yahoo own <4% of the search market in Italy
- A consistent increase in one-word search queries (and a decline in longer phrase searches) shows an increase in the prevalence of searching via mobile devices



Percentage of Internet users by region



Cultural features

37% have never accessed the Internet

- Proud of "Made in Italy", a guarantee of quality
- Preferred payment is credit card. Pre-paid cards and e-wallets like PayPal also used
- Some mistrust still exists in online purchasing: Italians like seeing the item before buying. Building trust is key
- Language and localisation is important. Italians like to buy in their own language and cultural differences between regions should be considered

Social media

15.2% of web users use:

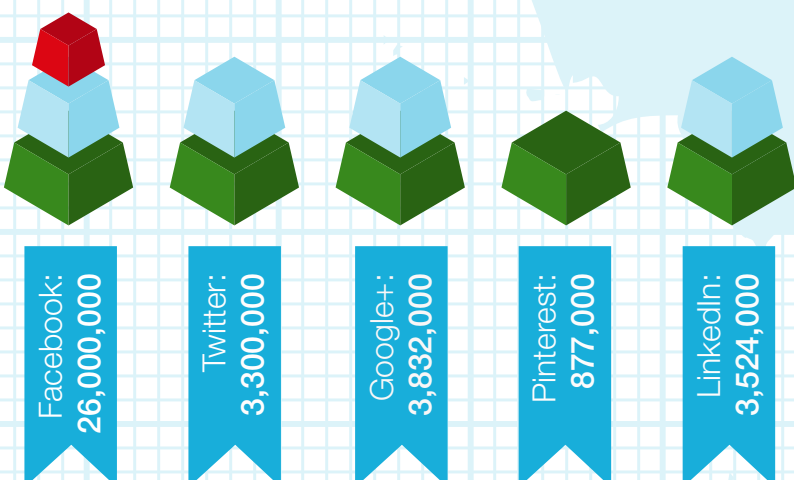
twitter

44.3% (75.6% of 16-24 yr olds) use:

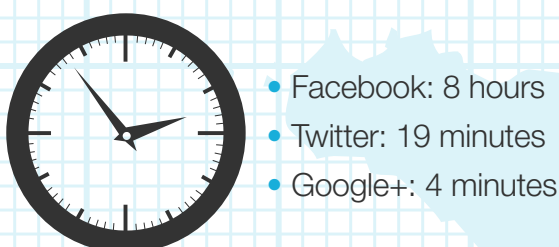
facebook

- 92% of Internet users own a social media account
- 38.7% of Italian web users use YouTube, (68.2% of 16-24 year olds)
- 28.9 million Italians use social networking sites monthly (+1.2% YonY) and 14.3 million use them daily (+3.8%)
- Italy is in the top 4 countries for growth of LinkedIn members

Social media users:



Average time spent on social sites per month:



Facebook growth by gender (YonY):



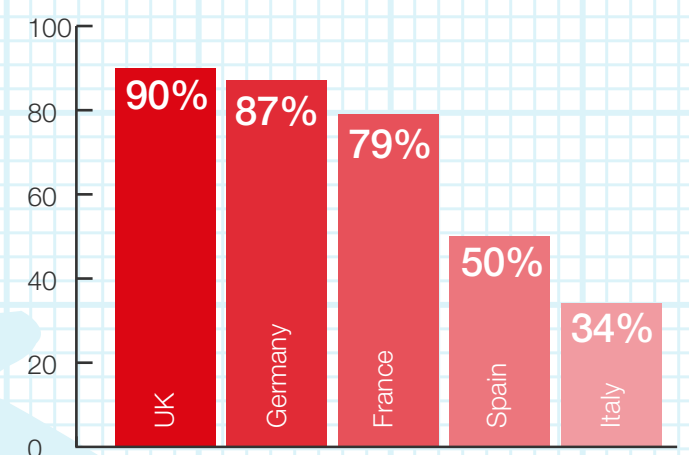
Ecommerce

14million Italian e-shoppers

7/10 have purchased an item or service online at least once

- There has been a 10% increase in purchases from mobile devices recently
- Customer satisfaction is good: 92% purchasers gave online shopping a score 7 out of 10
- Italians have been slower to uptake on shopping online, just 11% shop regularly online vs. 35% of Europeans
- Influence is a major factor: peer reviews, blogs, social media and forums can have a significant impact on trust

% of Internet users buying online in Europe:



Italy is the last European country buying online. Reasons why Italians are reluctant to buy online:

Desire to examine the product



% of online sales in Italy:

