E-COMMERCE: BUSINESSES AND CONSUMERS FACING THE E-SHOPPING CHALLENGE

The FBY - Fulfillment By Yocabè platform manages: logistics, warehouse, shipments for e-commerce

FBY uses its technology to handle all your logistics needs, from order collection, inventory management, shipping and returns. This will give you much more time to focus on growing your business.
FBY controls a widespread logistics network, both in Italy and Europe. Our service makes it possible to integrate with your e-commerce quickly and economically, through a single platform and with clear and transparent rates. We will help you reduce e-commerce shipping costs and delivery times so as to optimize the fulfillment process of your e-commerce.

LOGISTICA E-COMMERCE

- Stoccaggio e gestione prodotti
- Connessione al tuo e-commerce
- Raccolta e gestione dei tuoi ordini
- Gestione spedizione e resi
- Tracciamento delle tue spedizioni
- Strumenti di analisi e reportistica

shopify
WOOCOMMERCE
storeden
PrestaShop
Magento
WiX

yocabe

Yocabè is the D2C-Direct to Consumer solution for success on Marketplaces

Through a single platform, each brand can optimize its presence on all online channels, maintain full control of prices – thanks to algorithms that intercept the best price between supply and demand – and minimize products in stock, creating multilingual catalogs optimized for each marketplace.
We support our PARTNERS 360˚ in their cross-country multi-channel distribution strategy.
Direct channel integration with our proprietary technology allows our dedicated team of specialists to ensure a "data driven" approach to optimizing operational management and maximizing performance.

VENDITA MULTI-CANALE

- Smart Catalogue
- Smart Syncing
- Smart Pricing
- Smart Logistics
- 24/7 Customer Service
- Business Intelligence

zalando
amazon
ebay
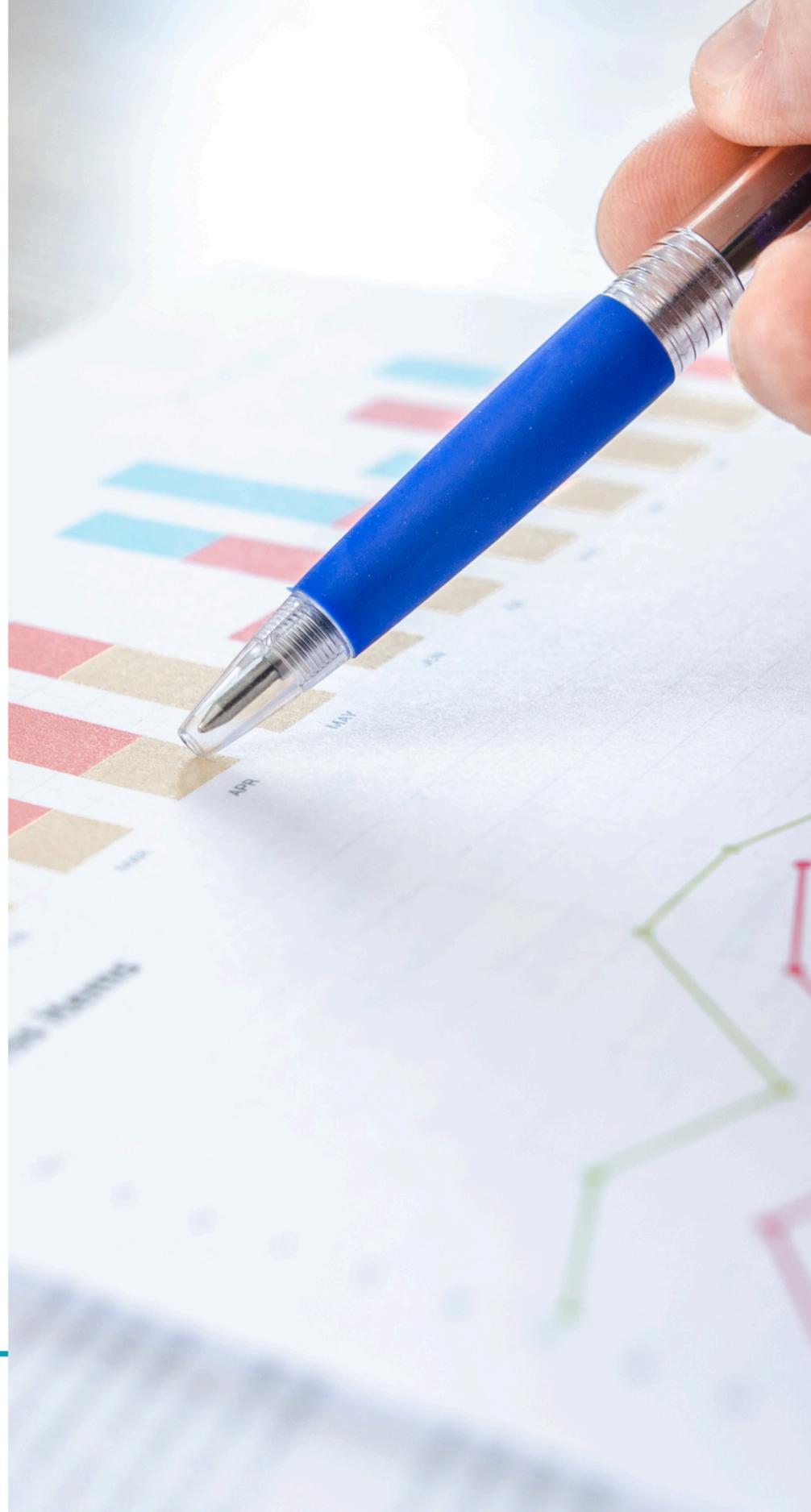MANOR
Veepee
YOOX

Contents

Introduction

E-commerce: 9 out of 10 consumers buy online on marketplaces but less than 50% of companies use them.

How companies behave and what consumers want: the research presents a snapshot of online commerce in Italy with a focus on logistics and shipping costs.

Research focus

Research: Business Needs and Consumer Trends

The research intercepts two different targets: on the one hand, it examines Italian companies in the fashion, home and furniture, consumer electronics, health and beauty, sports and leisure, children's games, food sectors, with the aim of detecting e-commerce policies; on the other, through a consumer survey, it analyses users' behaviour towards online purchases.

Presentation of the survey

> This report presents the results of a business survey on e-commerce conducted for Yocabè in collaboration with Format Research. The business survey was supported by a consumer survey in order to have a broader understanding of the e-commerce phenomenon.

> The aim of the consumer survey was to analyse consumer behaviour towards online purchases and the relevance of sustainability aspects of companies' e-commerce to these.

> Through the two surveys it was possible to outline an overview of the needs, on the one hand of companies, on the other of Italian consumers, in terms of services, logistics and sustainability in relation to e-commerce.

> The interviews with companies (400 cases) and those with consumers (400 cases) were carried out using the CATI (Computer Aided Telephone Interview) and CAWI (Computer Aided Web Interview) systems in the period between 12 and 31 January 2023.

BUSINESSES

8

Research project

This research is the result of a survey conducted in Italy and carried out in collaboration with Confcommercio Roma by Format Research.

The aim is to detect, describe and analyze the e-commerce, sustainability and internationalization policies of companies.

The study examined a statistically representative sample of Italian companies that have been doing e-commerce for at least a year or that have an account on an active marketplace and that have a minimum of 100 e-commerce shipments per month.

The data is reported to the universe.

95% confidence interval (Error +4.2%).

Sample size

Total sample size:

400 almost

Geographical area (North West, North East, Center, South and Islands)

Study domains

2-9 employees

10-49 employees

over 49 employees

Sectors

- **Food (dry foods and long-life)**
- **Home & Furniture (Household Items)**
- **Fashion (clothing, footwear, jewelry, glasses, accessories)**
- **Consumer electronics (hardware, telephony, photography)**
- **Health and beauty (perfumes, cosmetics, supplements)**
- **Sports and Leisure (Sportswear, Accessories, Equipment)**
- **Games for children**

E-commerce in Italy

There are over 80,000 companies in Italy that use e-commerce as a sales channel.

Italy
80.311

Universe of companies that use e-commerce as a sales channel

Fashion

Consumer Electronics

Health and beauty

Sports and Leisure

Home and furniture

Games for children

feeding

FOOD: Dry and long-life foods, drinks, supermarkets, catering; **HOME AND FURNISHINGS:** Furniture, household items, small-sized garden furnishings; **FASHION:** Clothing, footwear, jewelry, glasses, accessories; **CONSUMER ELECTRONICS:** Household appliances, hardware, telephony, photography; **HEALTH AND BEAUTY:** Perfumes, cosmetics, supplements; **SPORTS AND FREE TIME:** Sportswear, accessories, instruments; **CHILDREN'S GAMES**

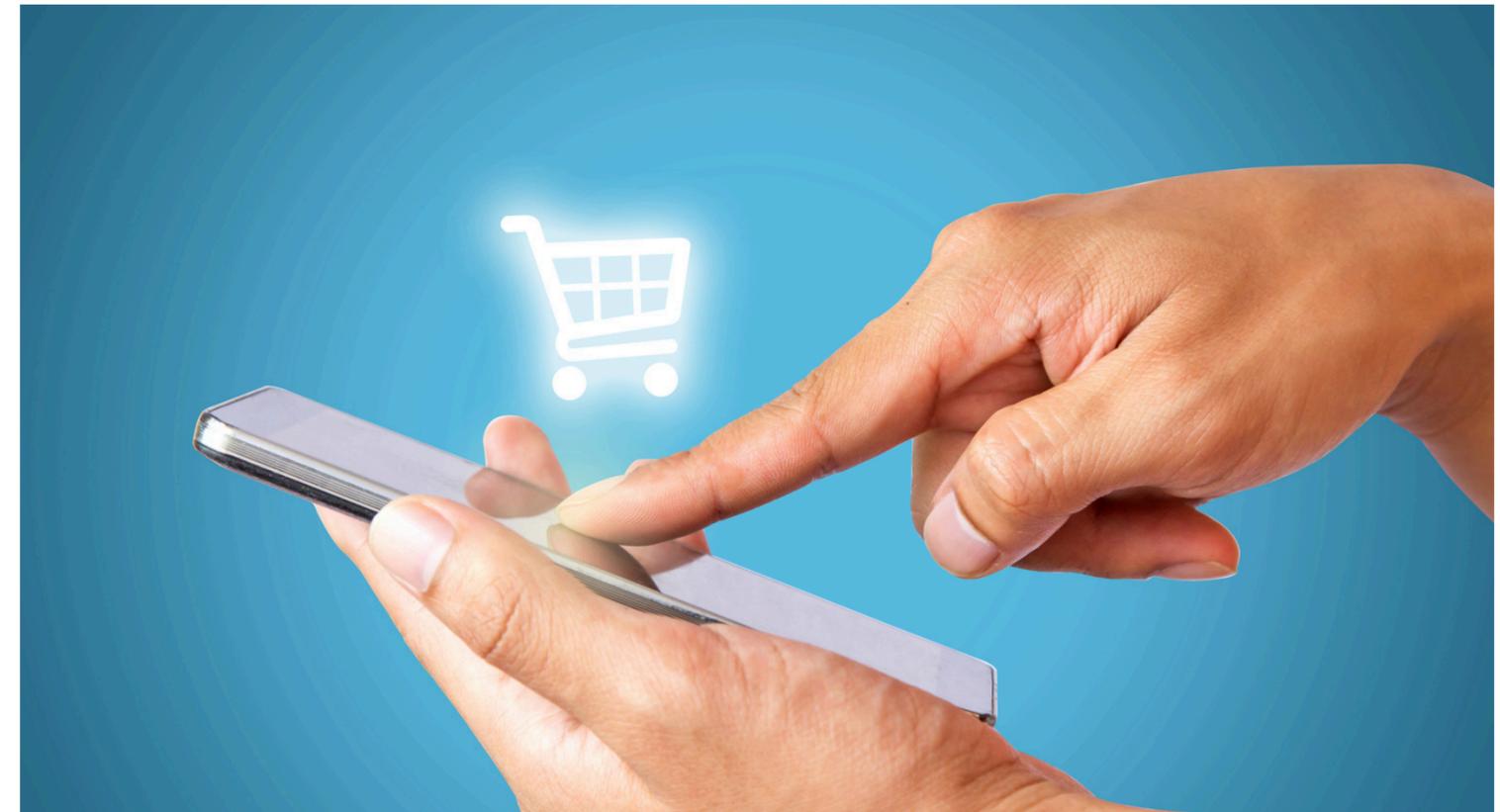**Source: Format Research elaborations on Cribis 2022 data.**

Digital processes

53.6% of companies use their own website to sell online, while 46.4% use marketplaces.

"

What sales model does your company use for e-commerce?

"

The company uses for E-COMMERCE...

53,6%
...A dedicated website of its own

46.4% of businesses use marketplaces

25,9%
...E-commerce site and marketplace channels

20,5%
...Only on marketplace channels

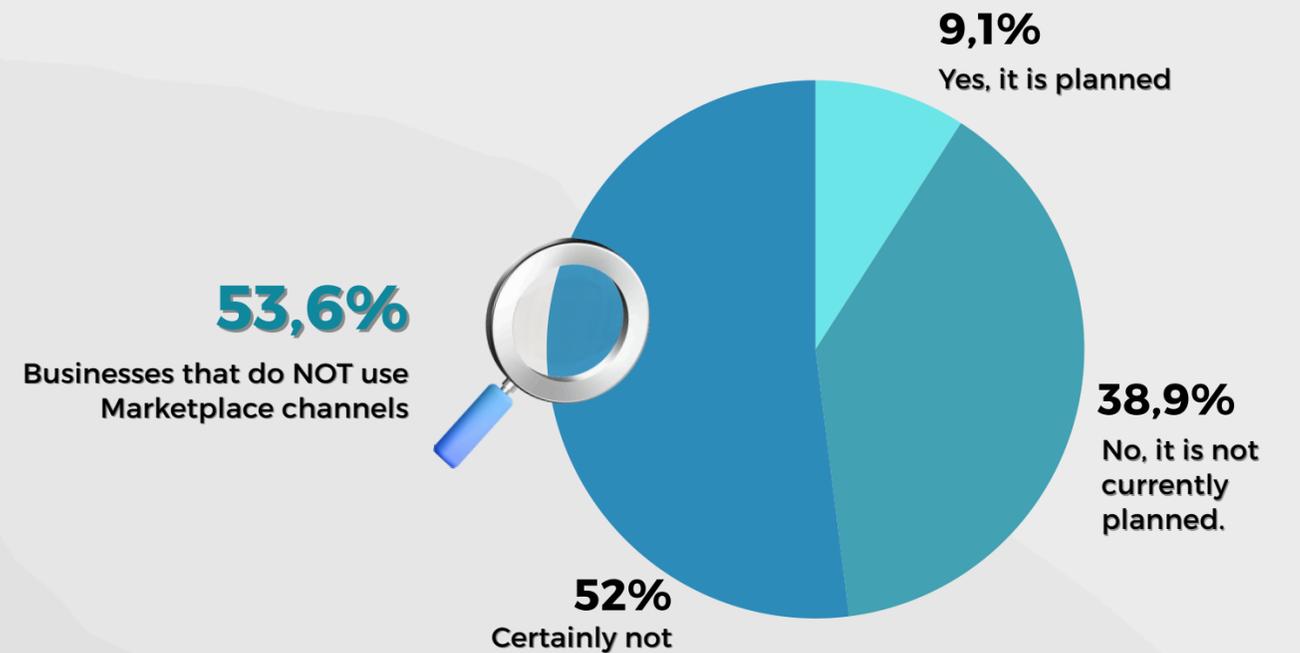**Sample base: 400 cases. Data are reported to the universe.**
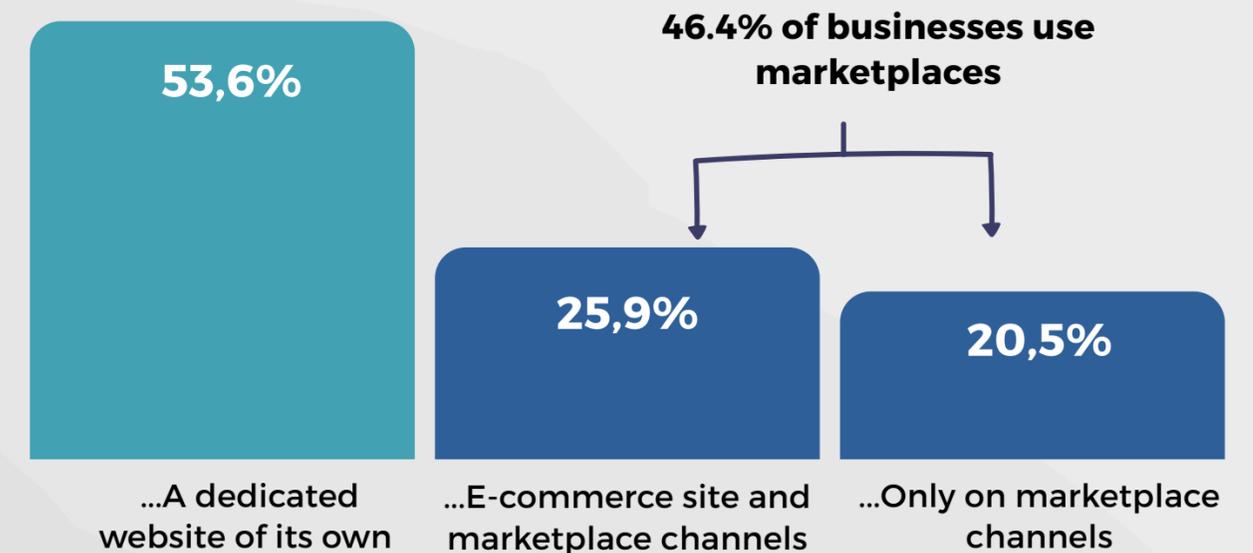
Digital processes

9.1% of businesses that do not currently use marketplace platforms for online sales plan to do so in the future.

"

(Non-marketplace users only) Is your company planning to use a marketplace platform for online sales?

"

9,1%
Yes, it is planned

53,6%
Businesses that do NOT use Marketplace channels

38,9%
No, it is not currently planned.

52%
Certainly not

Sample base: 214 cases. Only those who do not use marketplace. Data is reported to the universe.
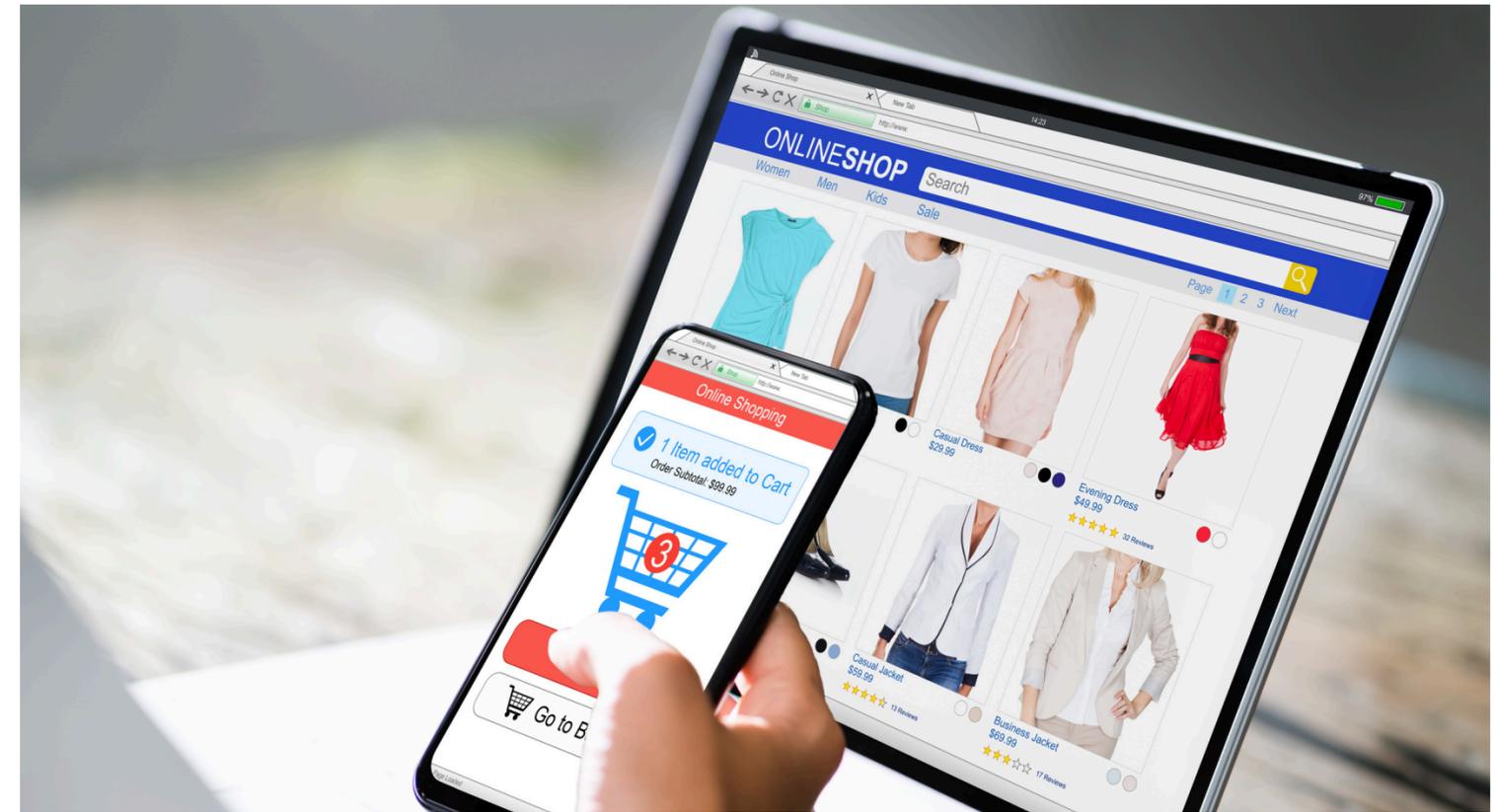
Digital processes

Among the marketplaces most used by companies that do e-commerce are Amazon (62.9%), eBay (38.4%) and Zalando (8.5%).

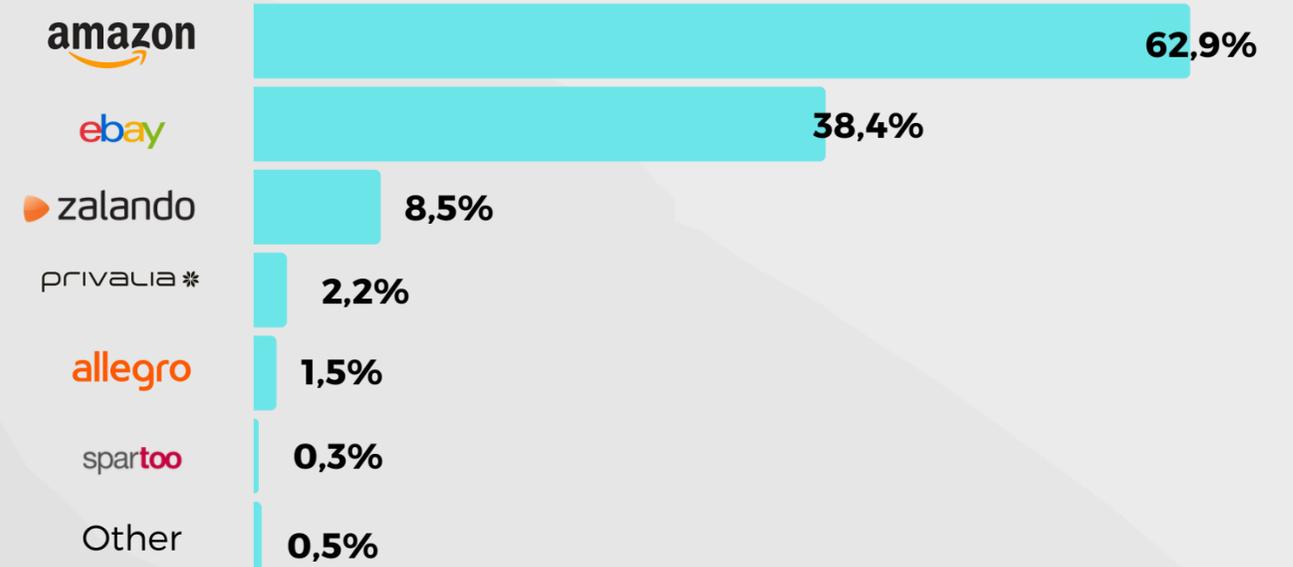" (Only those who use marketplaces) Which marketplaces does your company use to support online commerce? "

Other: The marketplaces included in the other category are Spartoo; Jd.com; Tmall; Farfetch; Cdiscount; La Redoute.

Logistics e-commerce

Approximately 83% of companies manage their own warehouse and use suppliers' couriers for transport.

"

Let's talk about e-commerce logistics. What kind of logistics does your company use (warehousing and transportation)?

"

82,9%

Management of OWN WAREHOUSE and COURIERS OF A SUPPLIER

7,9%

We entrust the entire cycle to a GLOBAL SUPPLIER

6,7%

Management of WAREHOUSE and SUPPLIER COURIERS

2,5%

We rely exclusively on MARKETPLACES

Sample base: 400 cases. Data are reported to the universe.

Logistics e-commerce

Companies that manage their own warehouse and use the supplier's couriers seem to be the most satisfied. On the contrary, 38.6% of companies that rely on marketplaces say they are not satisfied.

❝

How satisfied are you with the logistics policy currently used by your company?

❞

Sample base: 400 cases. Data are reported to the universe.

Own warehouse and supplier's couriers

22% 42,3%
20 INDICATOR
35,7%

Supplier warehouse and courier management

20,1% 13,1%
-7 INDICATOR
66,8%
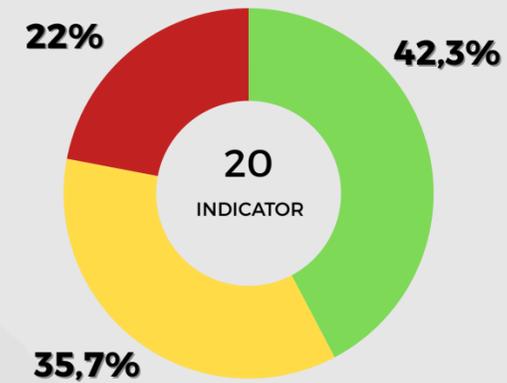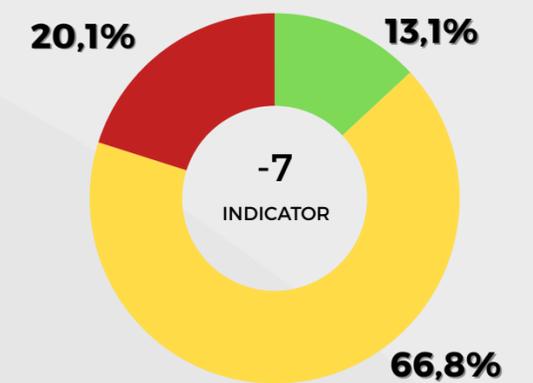
■ Very satisfied   ■ Quite satisfied   ■ Not at all satisfied

We entrust the entire cycle to a global supplier

41,3% 23,2%
-18 INDICATOR
35,6%

We rely on marketplaces

38,6% 13,8%
-7 INDICATOR
47,6%
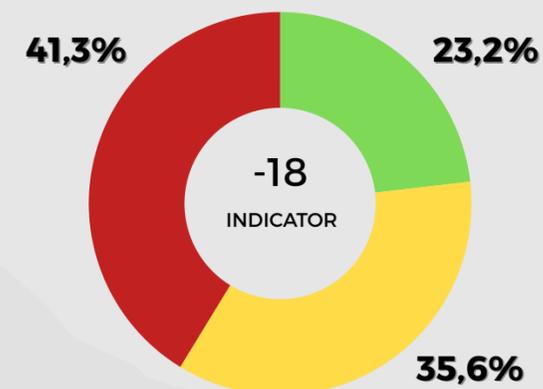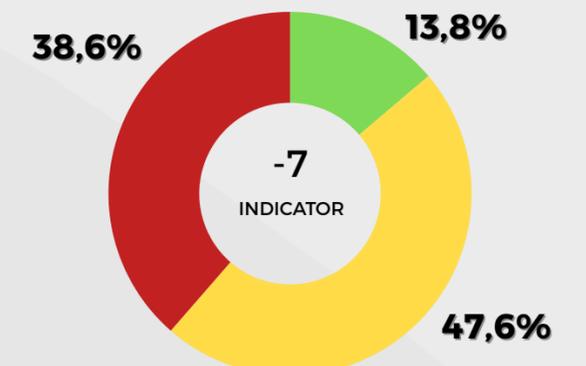
Logistics e-commerce

The major critical issues encountered by companies in managing e-commerce logistics are costs (44.3%) and returns management (19.9%).

" What are the major critical issues you have encountered in managing e-commerce logistics? "

28,6%
He found critical issues

71,4%
No critical issues

Critical issues encountered

Logistics costs	**44,3%**
Returns Management	**19,9%**
Respect for delivery times	**15,1%**
Bureaucracy	**11,4%**
Operations Management	**11,3%**
Customer service	**10,5%**
Technology integration	**5,9%**
Sustainability Policies	**3,9%**

Sample base: 400 cases. The sum is greater than 100 because multiple responses were allowed. Data are reported to the universe.
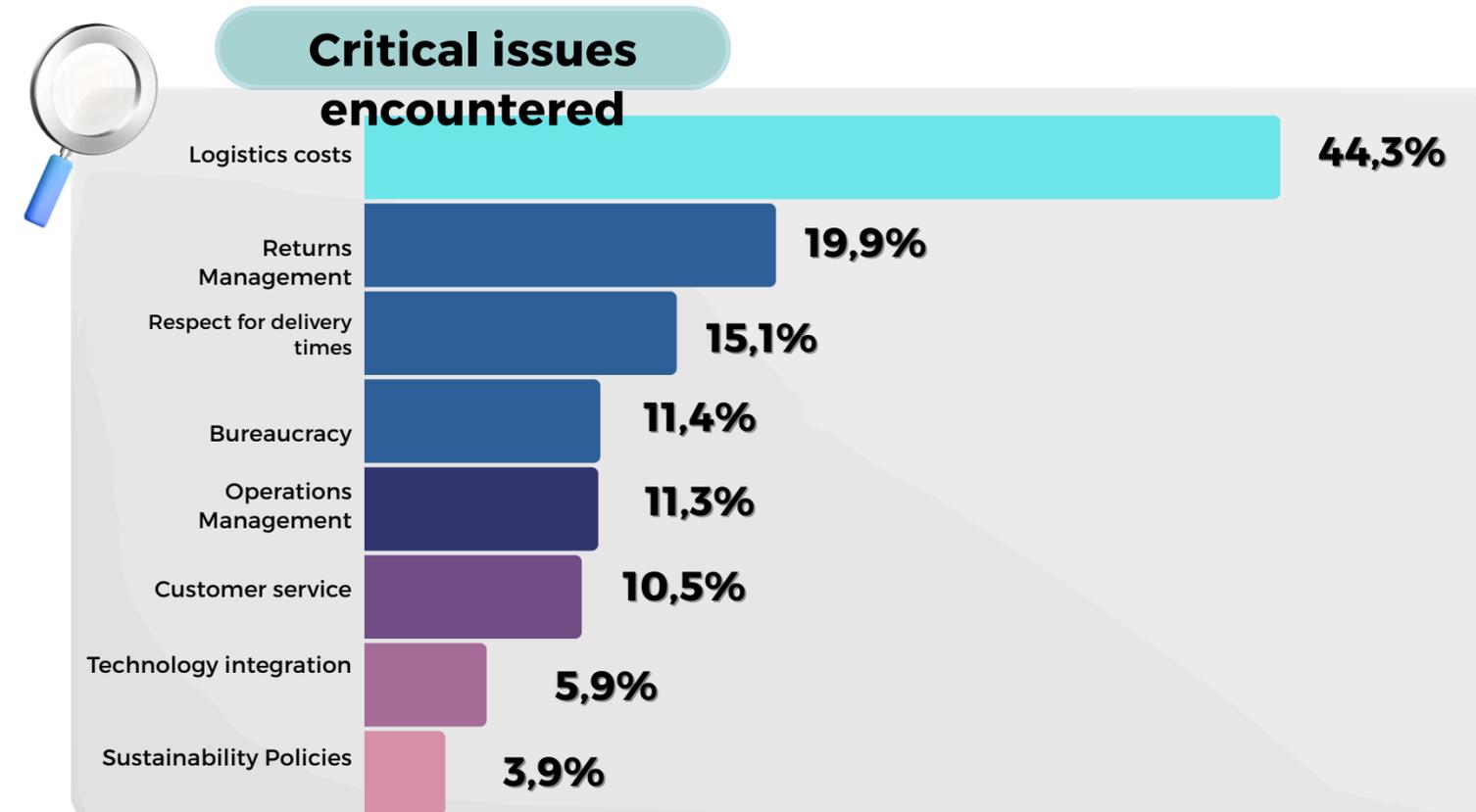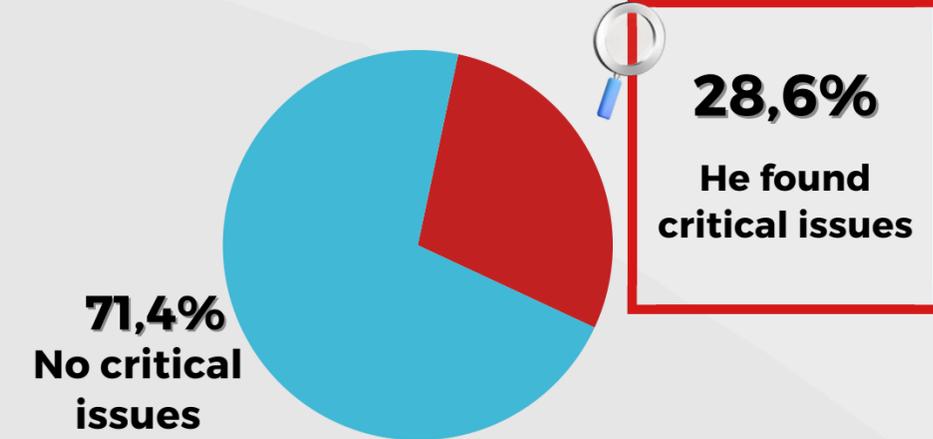
Logistics e-commerce

The companies that have encountered the greatest critical issues in managing e-commerce logistics are those that entrust warehouse management to suppliers and use the supplier's couriers (71.1%).

> " What are the major critical issues you have encountered in managing e-commerce logistics? "

Total: 71.4% No critical issues; 28.6% encountered critical issues in logistics management of e-commerce.

Sample base: 400 cases. Data are reported to the universe.

Own warehouse and supplier's couriers

23,8%
76,2%

Supplier warehouse and courier management

28,9%
71,1%
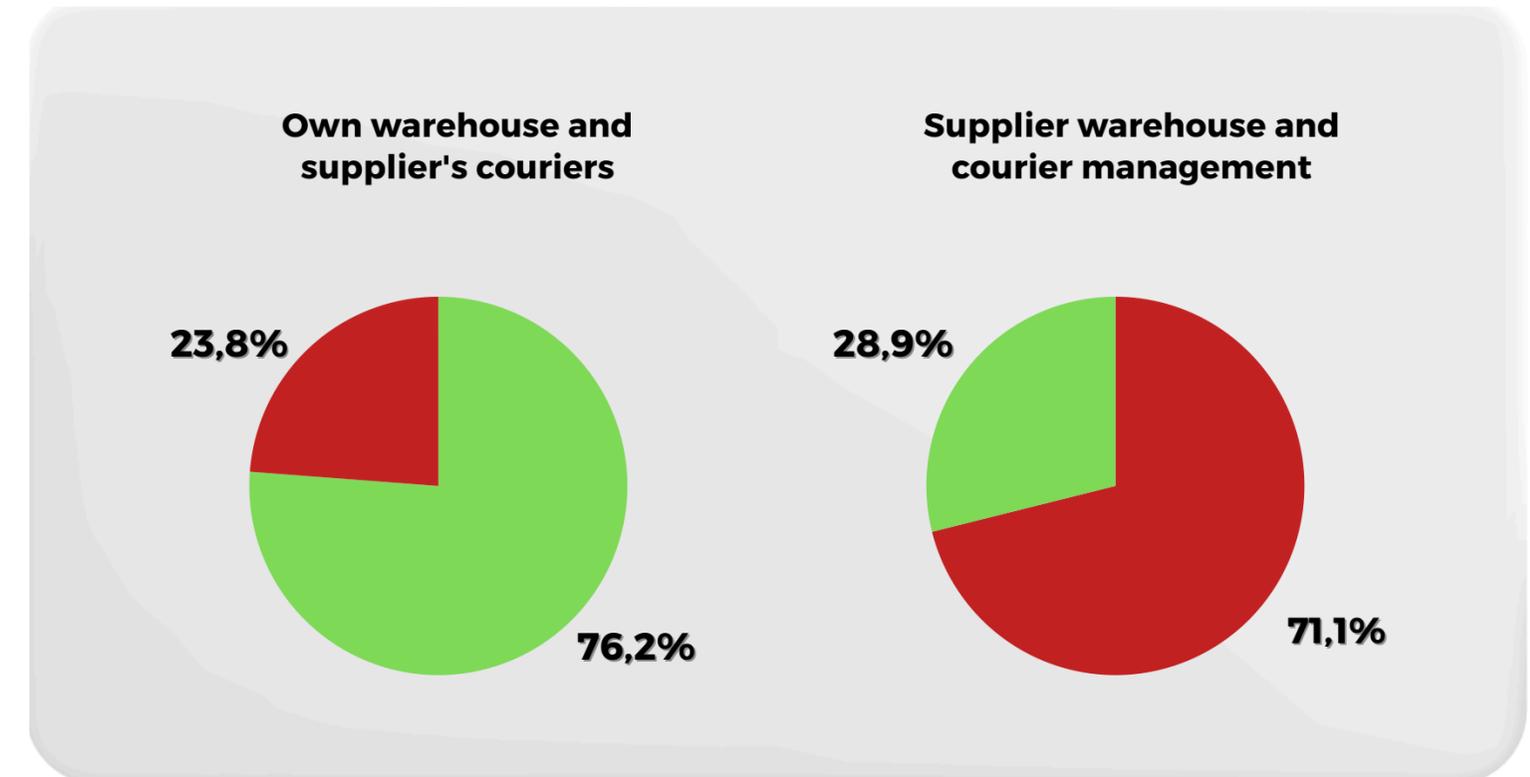
🟩 No critical issues   🟥 He found critical issues

We entrust the entire cycle to a global supplier

32,8%
67,2%

We rely on marketplaces

30,1%
69,9%
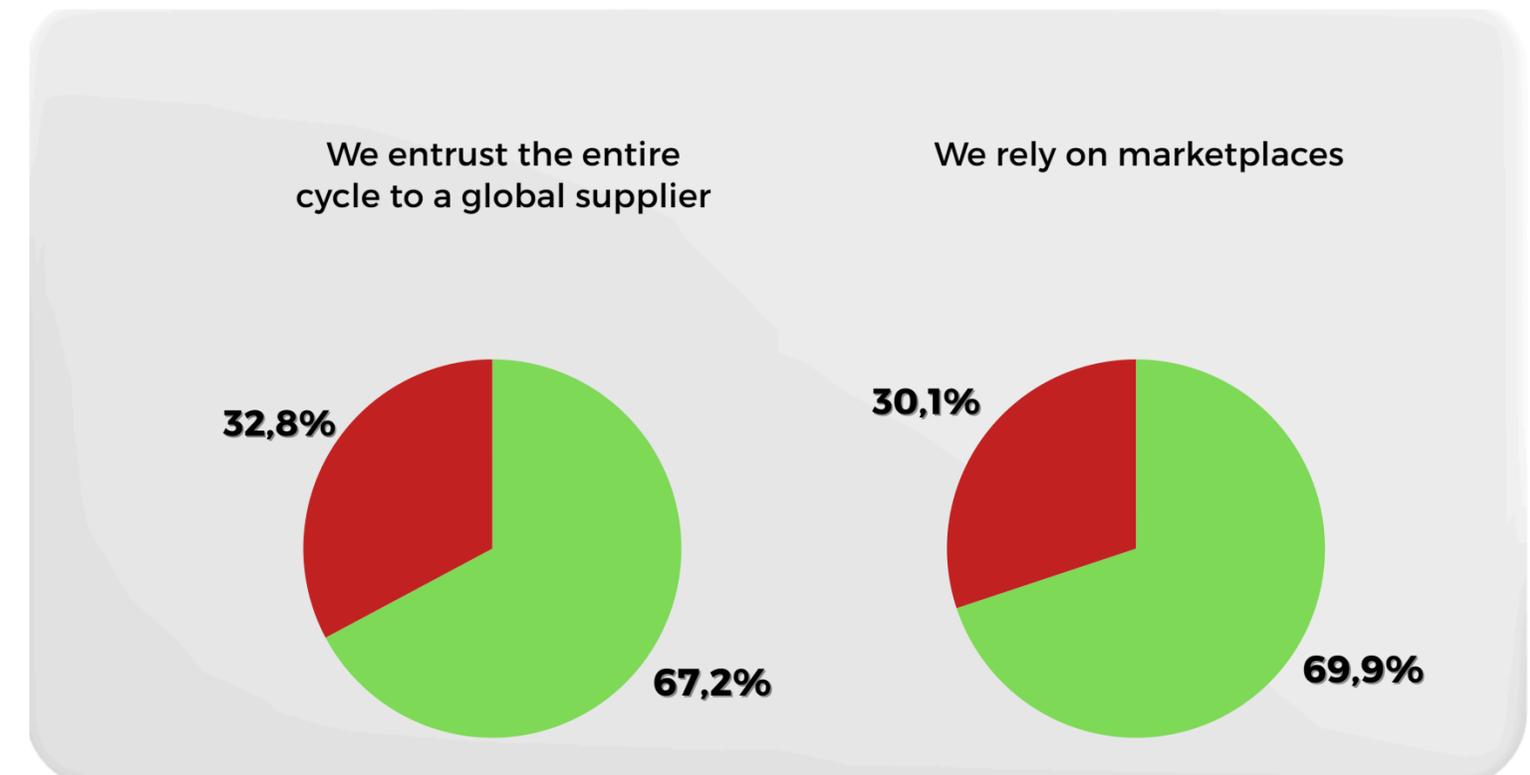
Logistics e-commerce

The difficulties encountered by companies in developing e-commerce are mainly the management of logistics and shipping costs (34.3%) and the investments required for marketing (25.4%).

"

What are the main difficulties that your company has encountered/is encountering in developing its e-commerce?

"

34,3%	25,4%	21,3%	10,3%	8,7%
Logistics management and shipping costs	The investments needed for marketing	External factors and product characteristics	Order Acquisition	Use of technological platforms

Sample base: 400 cases. Data are reported to the universe.
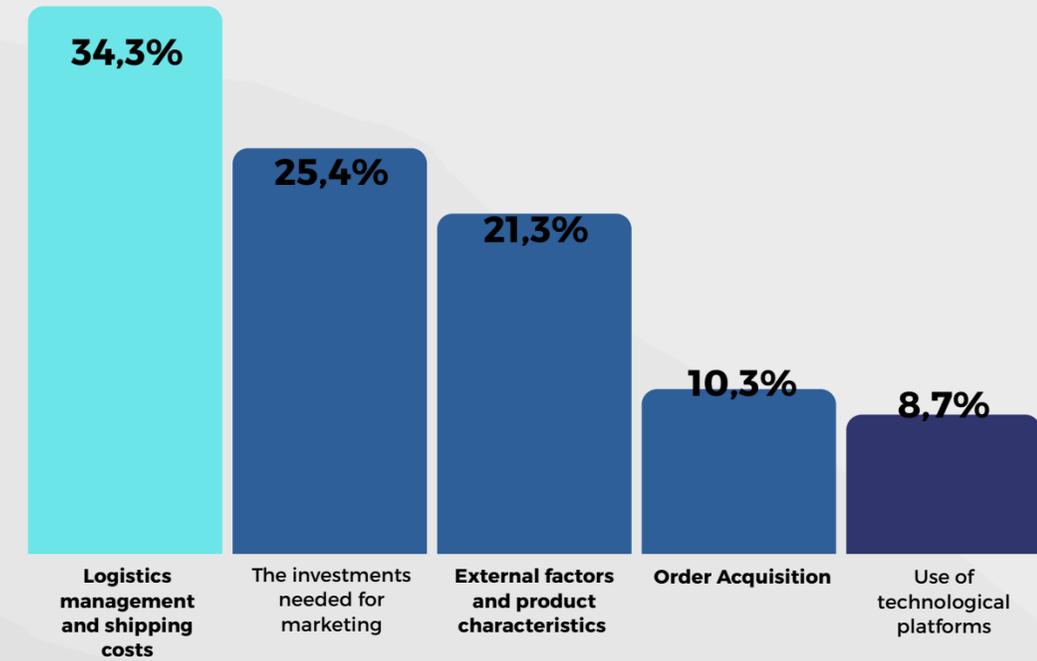
Logistics e-commerce

The difficulties that most hinder business growth according to companies are logistics management and the use of technological platforms.

> "In your opinion, how much do the difficulties encountered in e-commerce represent an obstacle to the growth of your online business?"

Logistics Management
47,1% | 52,9%

Use of technological platforms
49,8% | 50,2%

Order Acquisition
53,5% | 46,5%

The investments needed for marketing
56,4% | 43,6%

Factors external to the company
58.8% | 41,2%

Product Features
61,9% | 38,1%

Shipping costs
64,2% | 35,8%

■ Not at all (values 0-6) ■ Quite a lot + A lot (values 7-10)

Sample base: 400 cases. Data are reported to the universe.
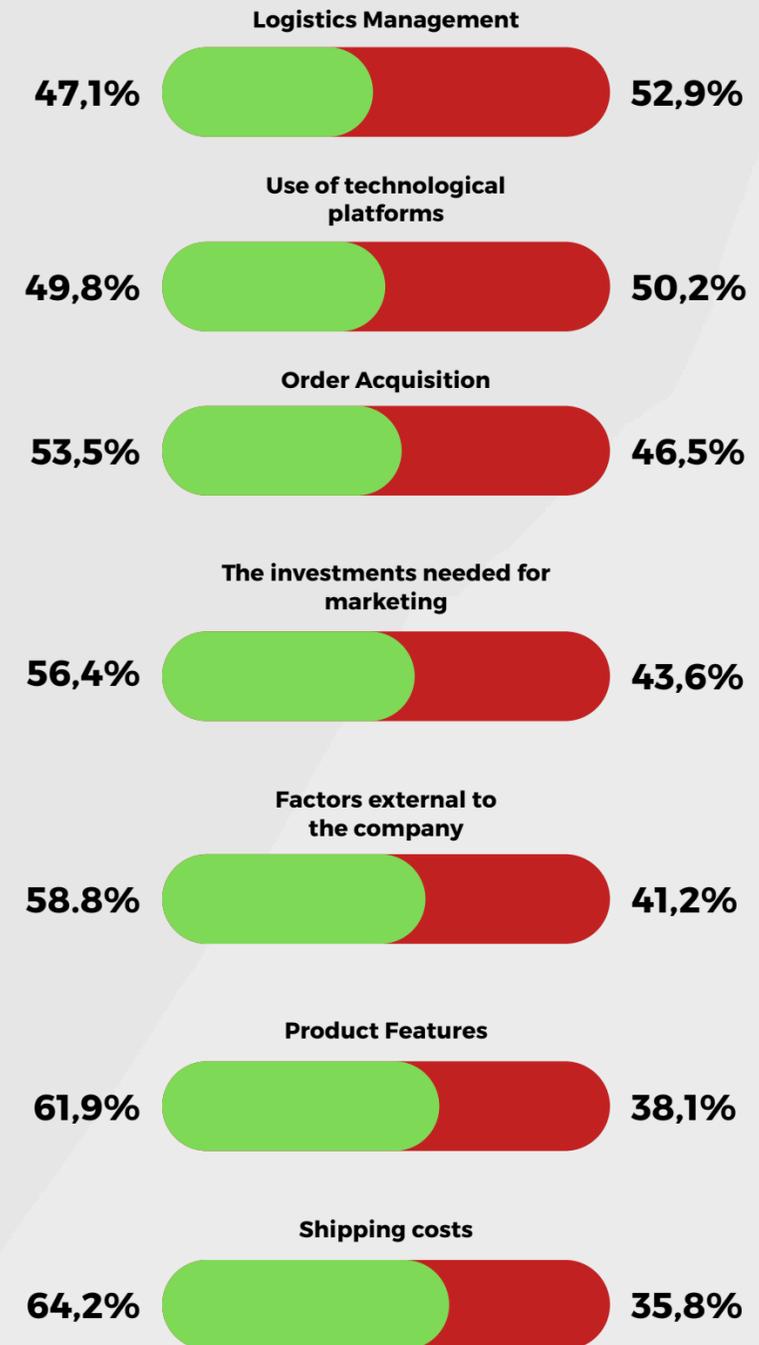
Internazionalizzazione del business

44.7% of companies also trade online with foreign countries.

> "
> Does your company trade online with foreign countries?
> "

44,7%
Yes, the company also trades abroad

55,3%
No, the company does not trade with foreign countries

Sample base: 400 cases. Data are reported to the universe.

Internazionalizzazione del business

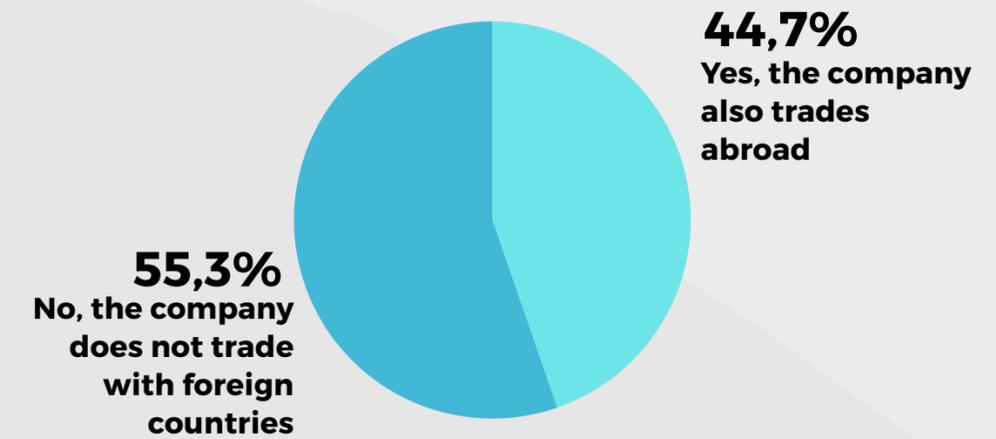**Shipping costs (55.1%) and tax aspects for non-EU countries (51.7%) are the main logistical problems encountered by companies that trade online abroad.**

"

Have you ever had to deal with logistical issues with foreign clients? If so, which ones?

"

44.7% of companies that trade online also with foreign countries

30,4%
Yes, it happened to me

69,6%
No difficulty
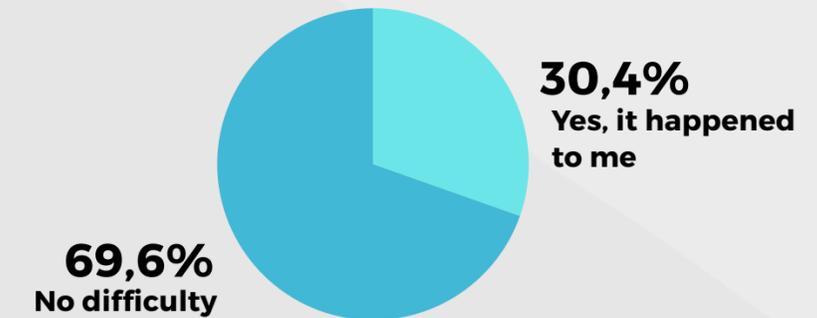
Logistics issues with foreign customers

Shipping costs	**55,1%**
Tax aspects (for non-EU countries)	**51,7%**
Shipping Logistics	32,7%
Returns with foreign customers	31,3%
Ability to work with foreign couriers	6,0%

Sample base: 181 cases. Data are reported to the universe.

CONSUMERS

Research project

This research is the result of a survey conducted in Italy and carried out in collaboration with Confcommercio Roma by Format Research.

The aim is to detect, describe and analyse consumer behaviour towards online purchases.

The sample examined was representative of the Italian population aged over 18.

The data is reported to the universe.

95% confidence interval (Error +4.2%).

Sample size

Total sample size:

Area (Northwest, Northeast, Central, South and Islands)

400 almost
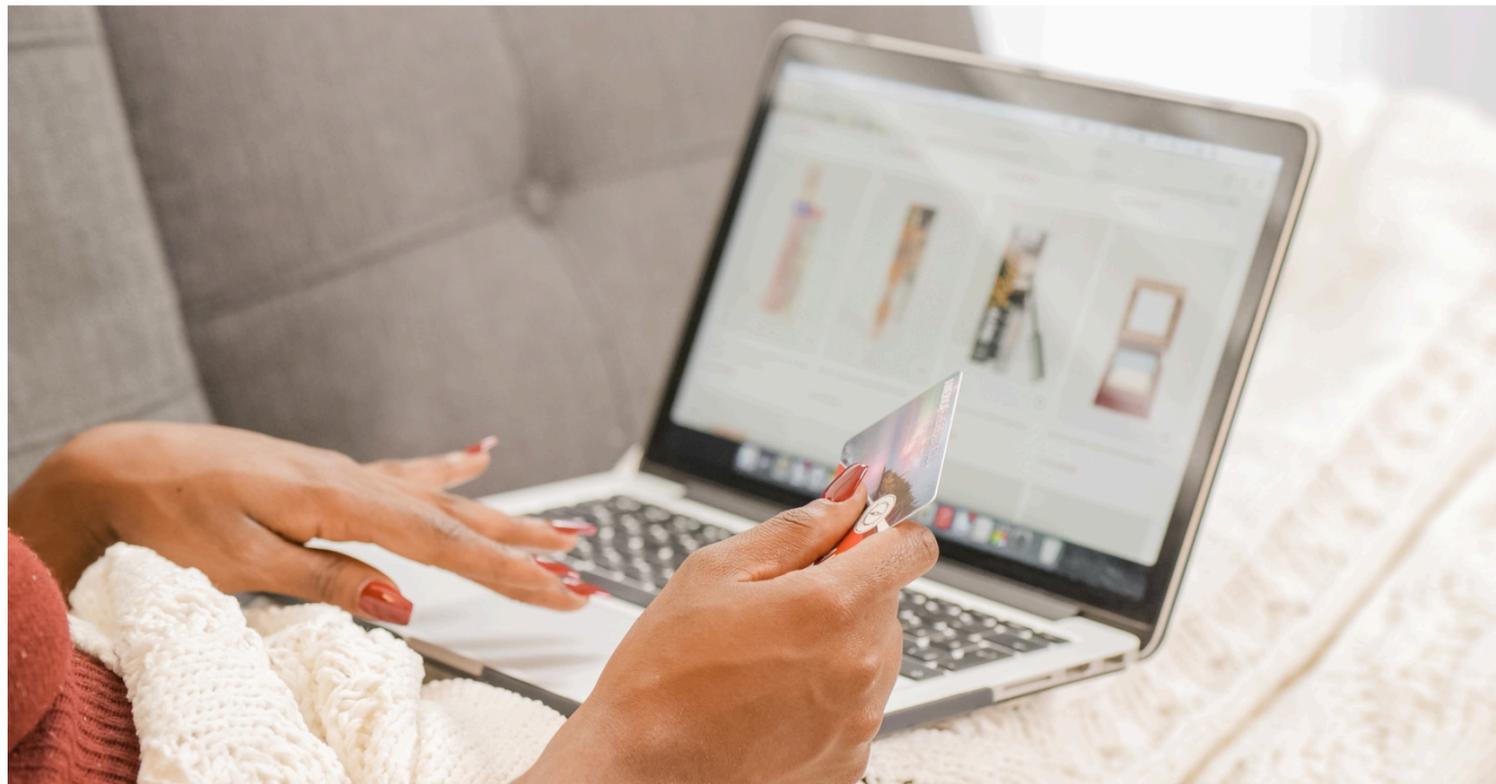
Age

18-24 years old

25-34 years old

35-44 years old

45-54 years old

55-64 years old

over 64 years old

Type

50% 50%
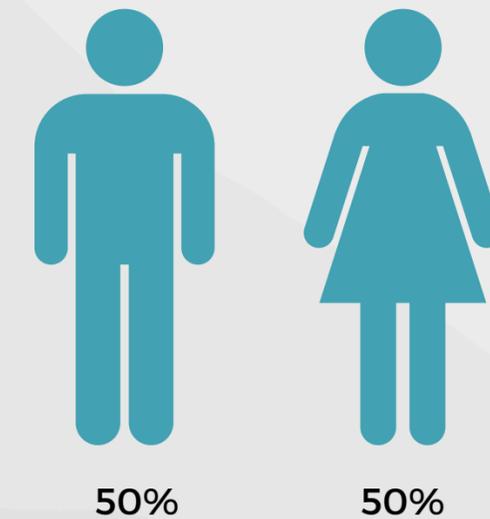
Consumer Profiling

About 60% of consumers usually shop online or on social networks at least once a month. "Habitual e-shoppers" are almost 25%.

" In the last year, how often have you made purchases online and/or on social networks? "

24,7%
At least once a week

59,9%
At least once a month

15,4%
Once or twice a year

Sample base: 401 cases. Data are reported to the universe.

Consumer Profiling

The most purchased product categories online in the last year are clothing and footwear (62.1%), electronic tools (60.1%) and household items (52.1%).

❝
What categories of products have you purchased online in the last year?
❞

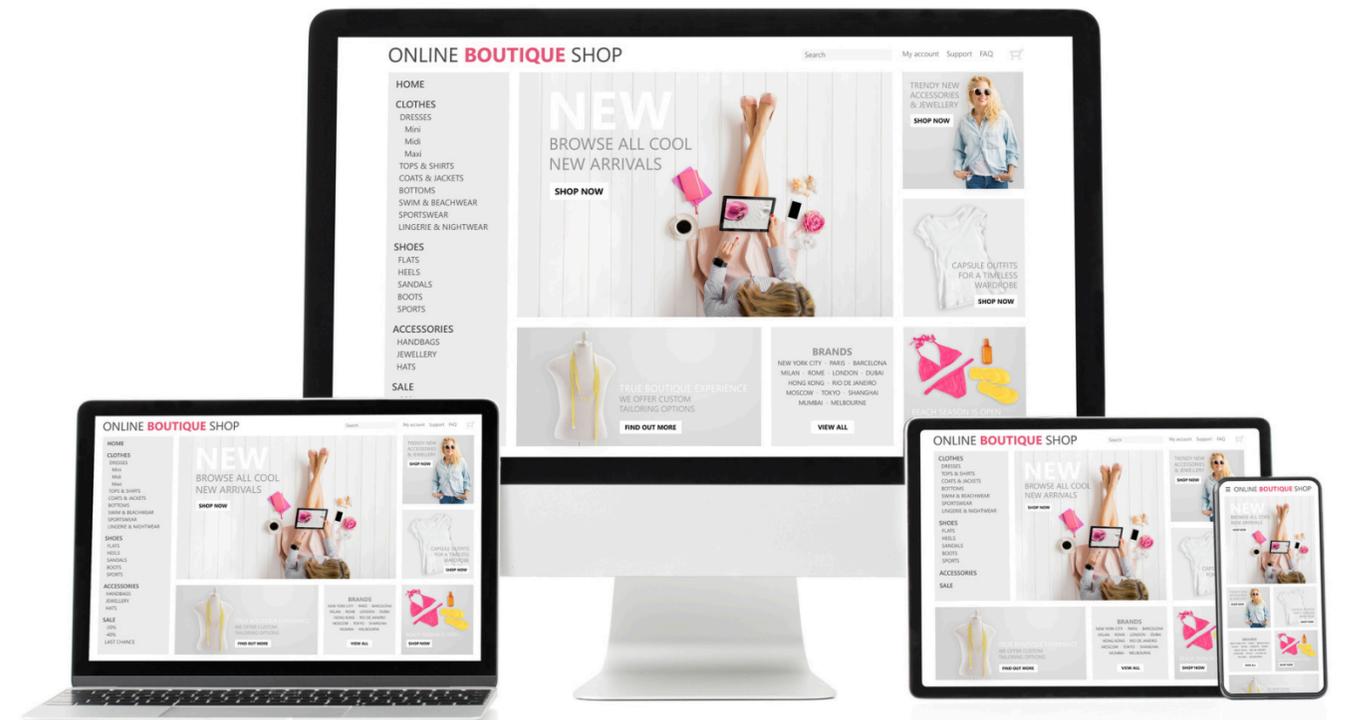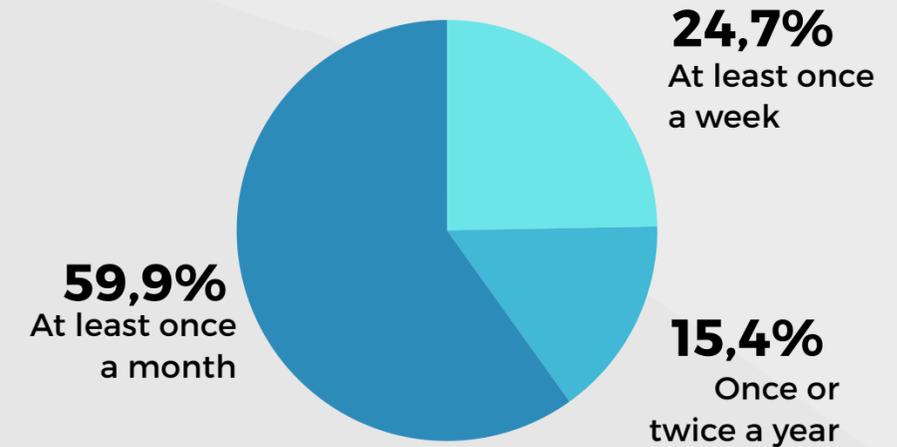**Note: The categories "Supplements" and "Perfumes and cosmetics" refer to the health and beauty sector.**

Category	%
Clothing and footwear	62,1%
Electronic tools	60,1%
Household items	52,1%
Sportswear and accessories	50,1%
Perfumes and cosmetics	44,4%
Supplements	41,6%
Groceries	27,9%
Games for children	27,4%
Jewelry and accessories (fashion)	22,2%
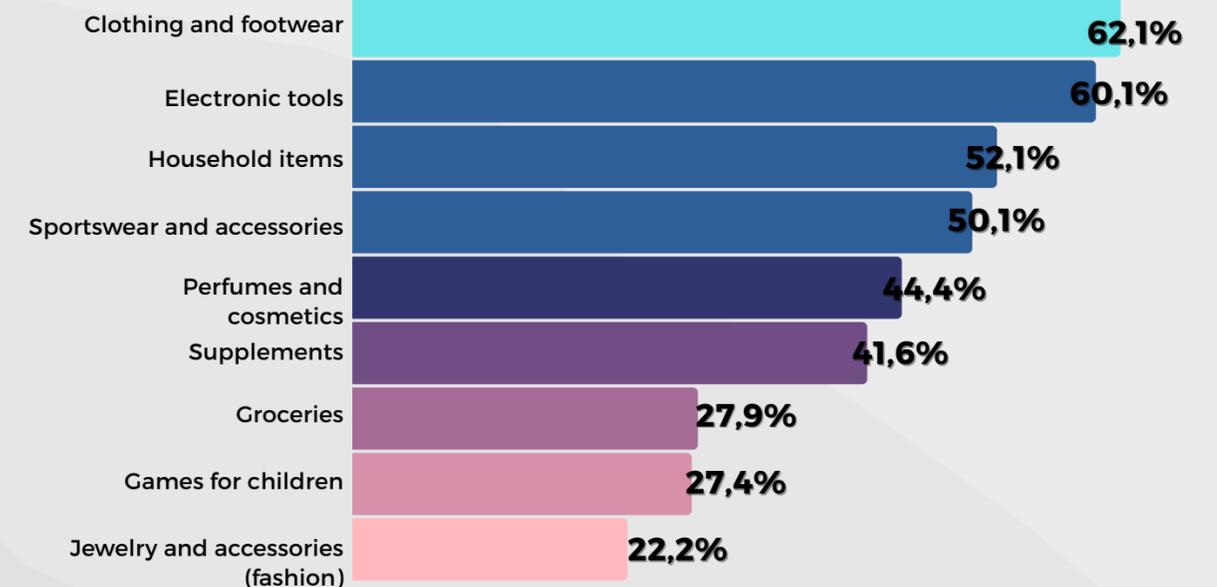
Sample base: 401 cases. The sum of the values is greater than 100 because multiple responses were allowed. The data are reported to the universe.

Purchase Channels

91% of consumers who shop online regularly use marketplace platforms as a purchasing channel.

" (Only those who have made online purchases) Through which of the following channels do you usually make your online purchases? "
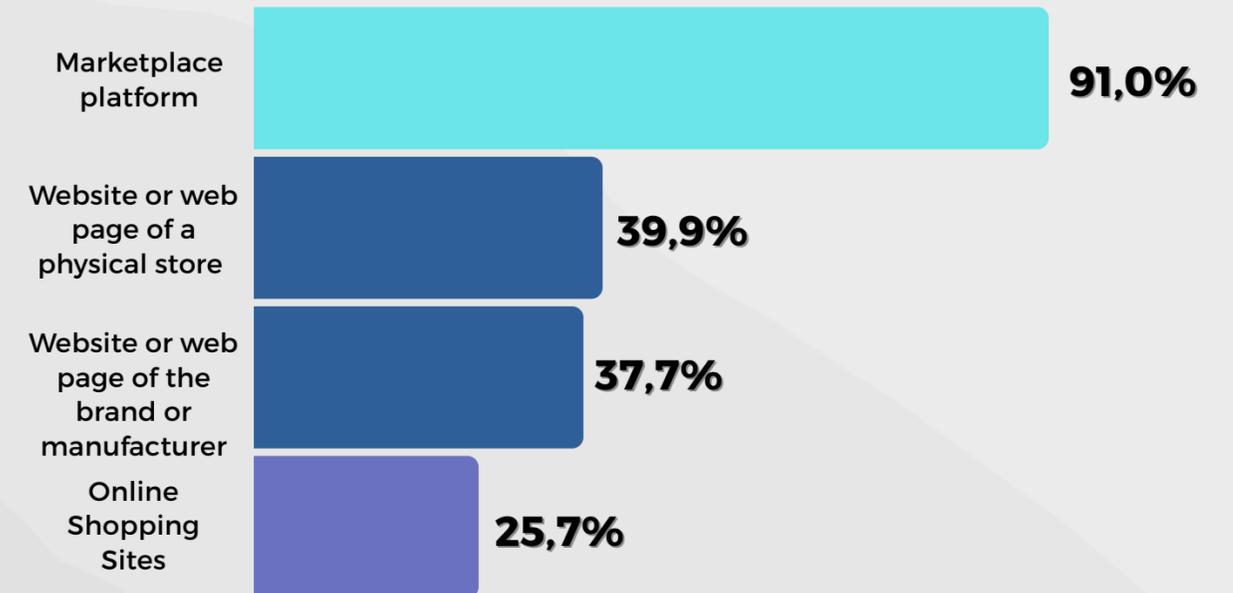
Note: By "physical store site" we mean businesses such as Decathlon, examples of "marketplace platforms" are E-bay or Amazon. Online shopping sites mean Groupon etc.

Marketplace platform — **91,0%**

Website or web page of a physical store — **39,9%**

Website or web page of the brand or manufacturer — **37,7%**

Online Shopping Sites — **25,7%**

Sample base: 401 cases. The sum of the percentage distribution is greater than 100 because the question offered the possibility of giving more than one answer.

Purchase Channels

The marketplace platforms most used for online purchases in the last year are Amazon (95%), eBay (41.6%) and Zalando (39%).

> **Could you tell me which marketplace platforms you have purchased from in the last year?**

Platform	Percentage
Amazon	95%
Ebay	41,6%
Zalando	39%
Decathlon	23,7%
Must	9,1%
Tricks	6,0%
YOOX	5,5%
Spartoo	2,7%
Coin	2,5%
Farfetch	0,8%

Sample base: 401 cases. The sum of the percentage distribution is greater than 100 because the question offered the possibility of giving more than one answer. Marketplaces indicated by the Client.
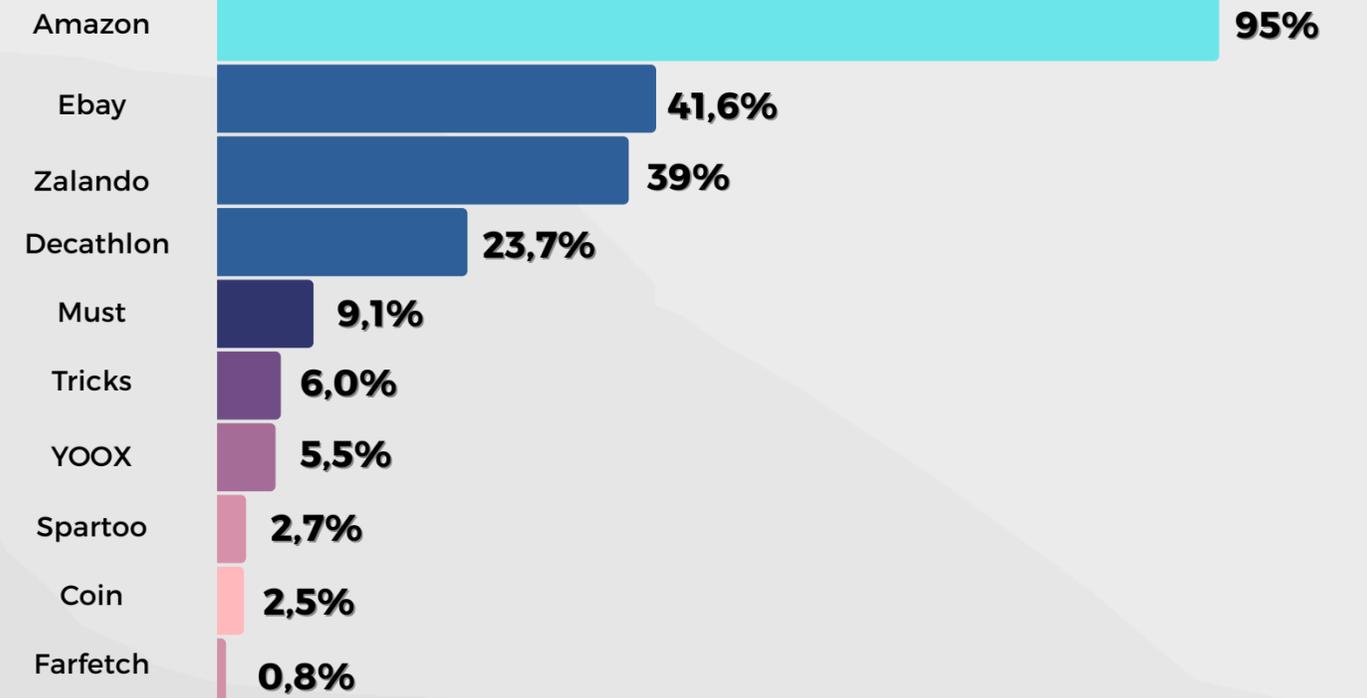
Purchasing behaviors

The advantages of purchasing through marketplace platforms are mainly the precisely indicated shipping times and the security of purchasing through a known "brand".

> **"** In your opinion, to what extent do the following aspects represent advantages of purchasing through marketplace platforms? **"**

Legend: **Not at all** | **Enough** | **Very**

	Not at all	Enough	Very
Shipping times exactly indicated, including the arrival date	16,9%	33,1%	50%
The safety/guarantee of purchasing through a known "brand"	17,2%	32,8%	50%
Cheaper/Free Shipping	19,1%	34,4%	46,4%
Cheaper/Free Return	17,8%	39,6%	42,6%

Sample base: 366 cases. Data are reported to the universe.

Purchasing behaviors

Free shipping and returns, greater simplicity of the returns procedure, as well as knowing the day of delivery are the aspects that could most determine the choice of consumers to purchase from an e-commerce of a store as an alternative to the marketplace.
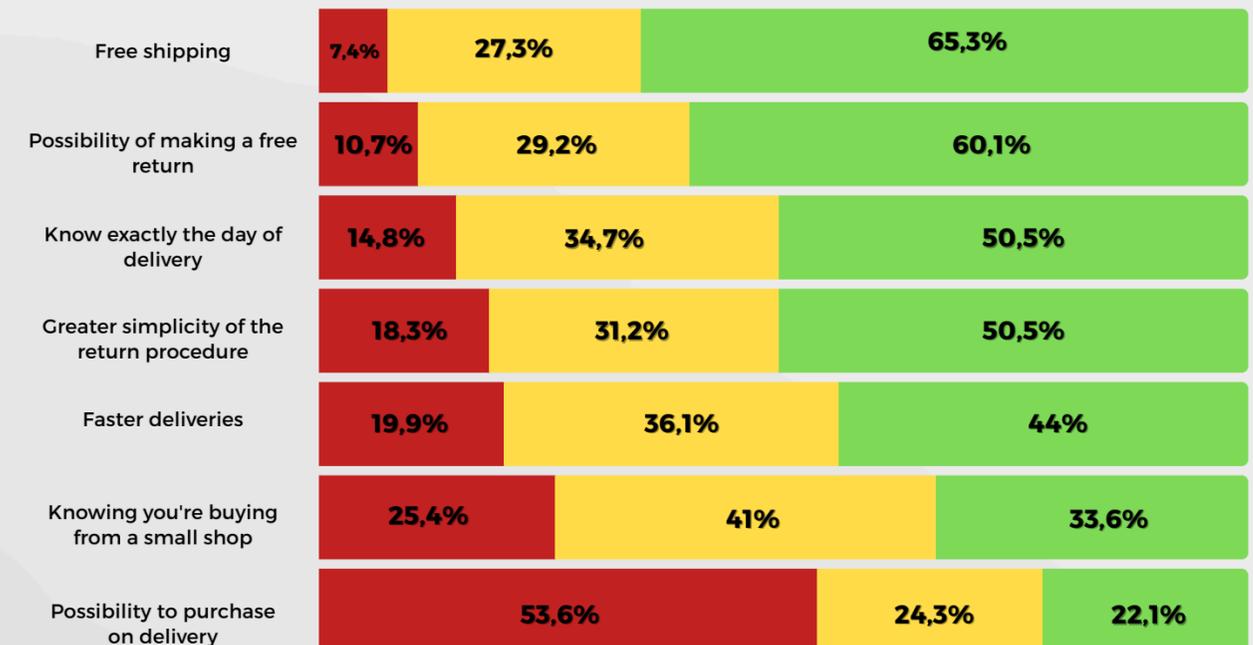

"How much could the following aspects determine your choice to purchase from a brand's e-commerce or a store as an alternative to the marketplace?"

	0-6	7-8	9-10
Free shipping	7,4%	27,3%	65,3%
Possibility of making a free return	10,7%	29,2%	60,1%
Know exactly the day of delivery	14,8%	34,7%	50,5%
Greater simplicity of the return procedure	18,3%	31,2%	50,5%
Faster deliveries	19,9%	36,1%	44%
Knowing you're buying from a small shop	25,4%	41%	33,6%
Possibility to purchase on delivery	53,6%	24,3%	22,1%

Sample base: 366 cases. Data are reported to the universe.
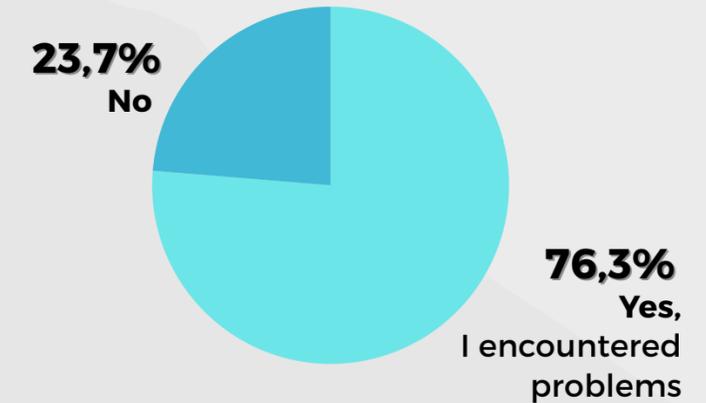
29

Purchasing behaviors

76.3% of consumers have encountered problems during an online purchase. The most frequently encountered problems are too high shipping costs (45.9%) and too long shipping times (31.7%).
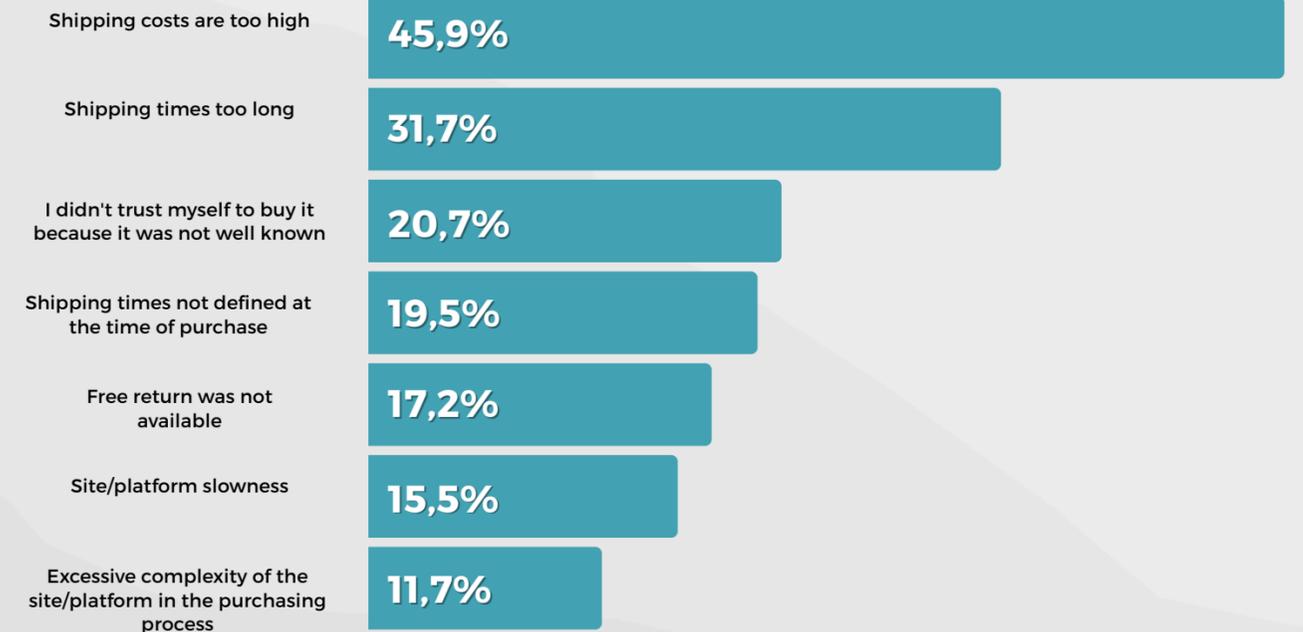
> Have you ever encountered any of the following problems while shopping online?

23,7%
No

76,3%
Yes,
I encountered
problems

Which?

Shipping costs are too high	**45,9%**
Shipping times too long	**31,7%**
I didn't trust myself to buy it because it was not well known	**20,7%**
Shipping times not defined at the time of purchase	**19,5%**
Free return was not available	**17,2%**
Site/platform slowness	**15,5%**
Excessive complexity of the site/platform in the purchasing process	**11,7%**

Sample base: 401 cases. Data are reported to the universe.

> Have you ever had an online purchase fail to complete in progress due to the problems you previously mentioned?

Slowness of the site
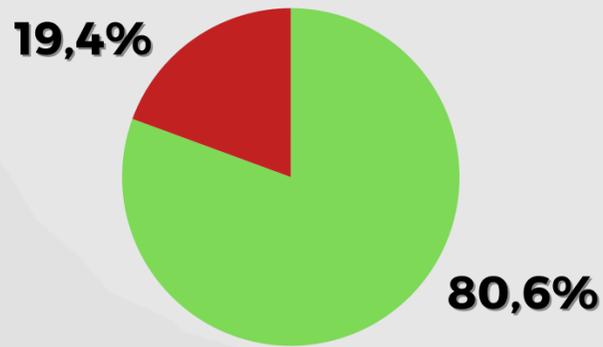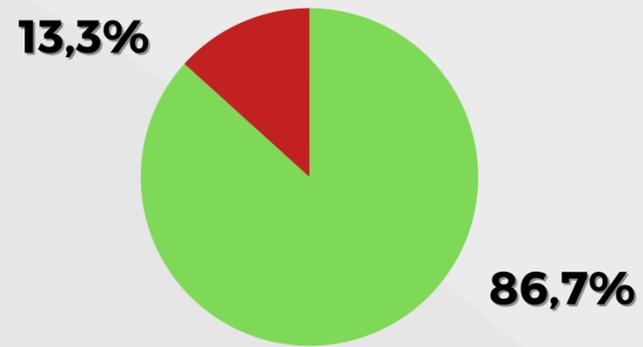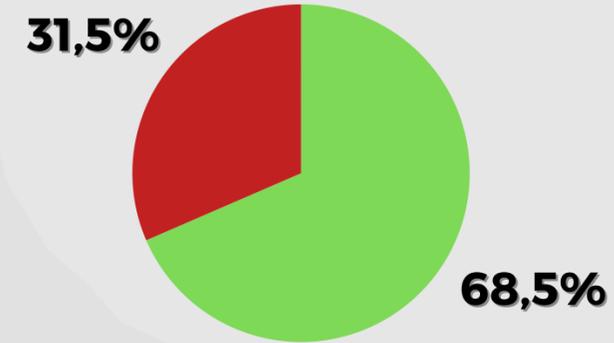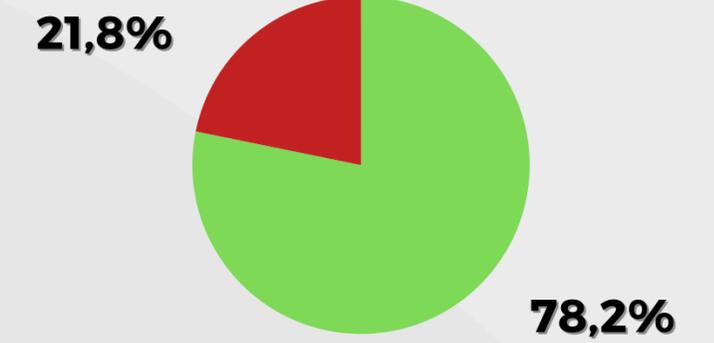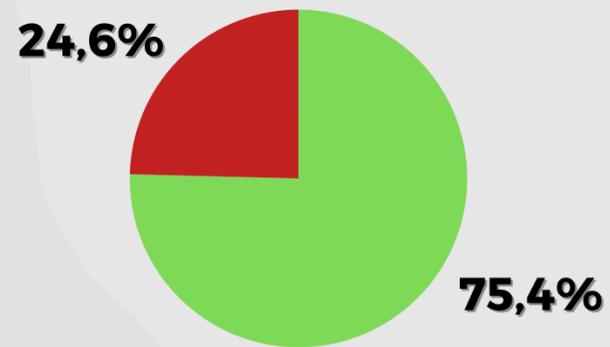
19,4%

80,6%

Little known site

13,3%

86,7%

Shipping times too long

31,5%

68,5%

Shipping times not defined at the time of purchase

21,8%

78,2%

Free return was not available

24,6%

75,4%

Shipping costs are too high

20,1%

79,9%
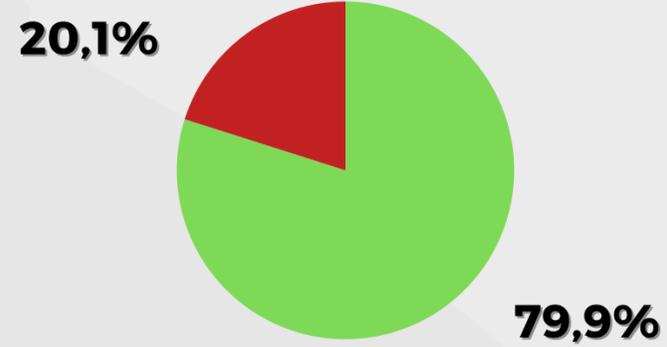
Excessive complexity of the site in the purchasing process

29,8%

70,2%
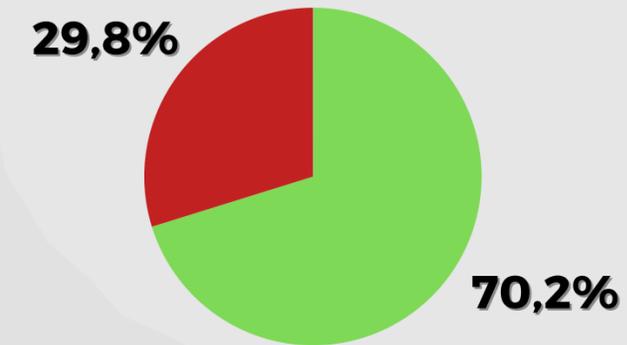
🟥 It's never happened to me

🟩 Yes, it happened to me

> The lack of trust in purchasing from a little-known site and the slowness of the site are the main problems for which consumers have not completed a purchase.

CONCLUSIONS

"The e-commerce industry requires the ability to understand customer needs and adapt your strategy to them.
91% of consumers buy on marketplaces, but less than half of the companies that sell online use them to market their products.
Logistics management is a critical factor for digital commerce.
Marketplace presence is a huge growth opportunity for traditional businesses."

Companies should aim to reduce the complexity and costs of shipping and returns instead of limiting their sales to preserve margins, which only drives consumers increasingly towards global platforms.

Method I Research Technical Sheet - ENTERPRISES

CLIENT
Yocabe

AUTHOR
Format Research Srl (www.formatresearch.com)

WORK OBJECTIVES
Detect, describe and analyze e-commerce, sustainability and internationalization policies by companies.

SAMPLE DRAWING
Statistically representative sample of Italian companies that have been doing e-commerce for at least a year or that have an account on an active marketplace and that have a minimum of 100 e-commerce shipments per month. Study domains of the sample: Size (2-9 employees, 10-49 employees, over 49 employees), Geographic area (North West, North East, Center, South and Islands), Sector: Food (dry foods and long-life), Home and furnishings (household items), Fashion (clothing, footwear, jewelry, glasses, accessories), Consumer electronics (hardware, telephony, photography), Health and beauty (perfumes, cosmetics, supplements), Sports and leisure (sportswear, accessories, instruments), Children's games.

SAMPLE SIZE
Total sample size: 400 cases. 95% confidence interval (Error +3.3%).

CONTACT METHOD
Telephone interviews administered with the Cati (Computer Assisted Telephone Interview) and Cawi (Computer Assisted Web Interview) systems;

DETECTION TECHNIQUE
Structured questionnaire.

PERIOD OF INTERVIEW CONDUCTION
From January 12th to January 31st 2023.

CODE OF ETHICS
The survey was carried out in compliance with the Esomar European Researchers' Code of Ethics, the Assirm Code of Ethics (Association of Research Institutes and Opinion Polls for Italian Companies), and the "Privacy Law" (Article 13 of Legislative Decree 196 of 2003 and EU Regulation no. 679/2016, Articles 13-14).

RESEARCH DIRECTOR
Dr. Pierluigi Ascani (Research Director) Dr. Francesca Ricciardi (Research Coordinator)

UNIVERSO DI RIFERIMENTO

	0-9	10-49	>49	totale
Nord-ovest	46499	1880	252	48.632
Nord-est	34008	1392	178	35.578
Centro	40705	1427	131	42.263
Sud	68236	1997	137	70.369
Totale	189.448	6.696	698	196.842

Fonte: I.Stat 2022

CAMPIONE REALIZZATO

	0-9	10-49	>49	totale
Nord-ovest	54	33	19	106
Nord-est	41	25	14	80
Centro	47	25	11	82
Sud	83	36	12	131
Totale	225	119	56	400

Method I Research Technical Sheet - CONSUMERS

CLIENT
Yocabe

AUTHOR
Format Research Srl (www.formatresearch.com)

WORK OBJECTIVES
Detect, describe and analyze consumer behavior towards online purchases

SAMPLE DRAWING
Statistically representative sample of the Italian population over the age of 18. Study domains of the sample: Gender (male, female); Area (north-west, north-east, center, south and islands); Age classes (18-24 years; 25-34 years, 35-44 years, 45-54 years, 55-64 years, over 64 years). The data are reported to the universe.

SAMPLE SIZE
Total sample size: 400 cases. 95% confidence interval (Error +4.2%).

CONTACT METHOD
Interviews administered with the Cawi (Computer Assisted Web Interview) system.

DETECTION TECHNIQUE
Structured questionnaire.

PERIOD OF INTERVIEW CONDUCTION
From January 12th to January 31st 2023.

CODE OF ETHICS
The survey was carried out in compliance with the Esomar European Researchers' Code of Ethics, the Assirm Code of Ethics (Association of Research Institutes and Opinion Polls for Italian Companies), and the "Privacy Law" (Article 13 of Legislative Decree 196 of 2003 and EU Regulation no. 679/2016, Articles 13-14).

RESEARCH DIRECTOR
Dr. Pierluigi Ascani (Research Director) Dr. Francesca Ricciardi (Research Coordinator)

Universo dei consumatori

	18-24	25-34	35-44	45-54	55-64	>64	Totale
Nord ovest	1.058.278	1.627.378	1.920.684	2.560.487	2.356.127	3.880.448	13.403.402
Nord est	784.437	1.189.902	1.398.474	1.880.449	1.731.889	2.762.952	9.748.103
Centro	771.082	1.192.403	1.463.455	1.907.666	1.753.698	2.834.141	9.922.445
Sud e Isole	1.486.678	2.234.944	2.489.592	3.029.655	2.900.199	4.381.549	16.522.617
totale	4.100.475	6.244.627	7.272.205	9.378.257	8.741.913	13.859.090	49.596.567

Fonte: I.Stat 2022

Campione realizzato

	18-24	25-34	35-44	45-54	55-64	>64	Totale
Nord ovest	9	13	15	21	19	31	108
Nord est	6	10	11	15	14	22	79
Centro	6	10	12	15	14	23	80
Sud e Isole	12	18	20	24	23	35	133
totale	33	50	59	76	71	112	400

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FBY is the platform that offers you complete management of Fulfillment: Logistics, Warehouse, Shipping, Returns, Customer Care.

Contacts

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