



Il consumatore multicanale e le opportunità digitali per il Retail

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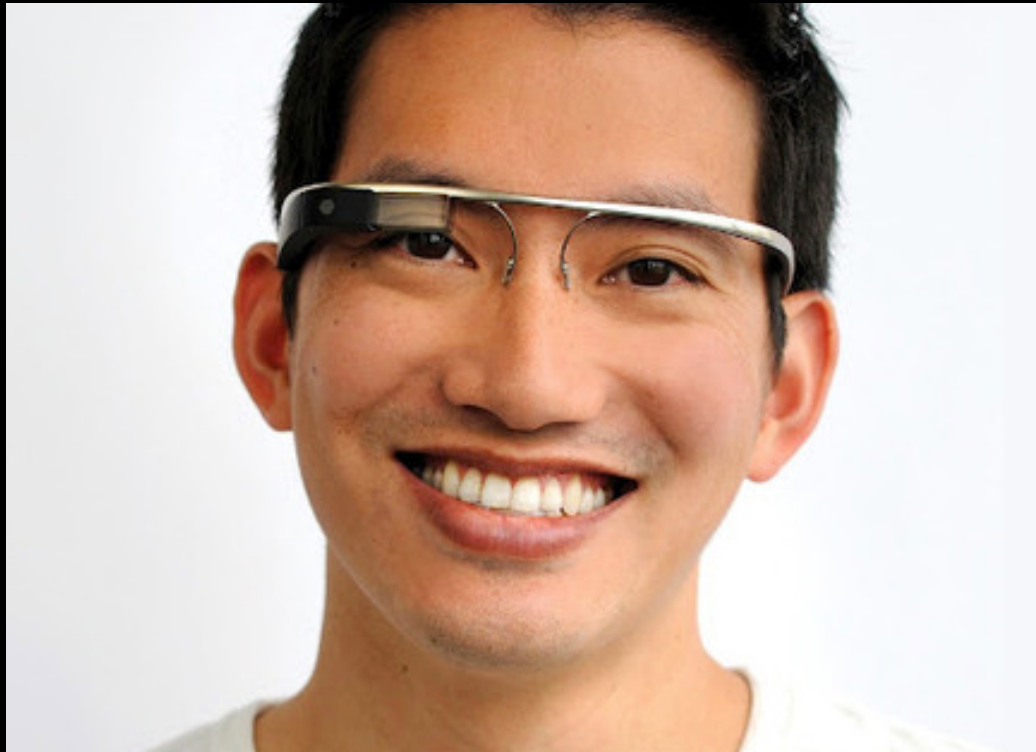
Consumer Behaviour: cosa sta cambiando?



Il consumatore di domani: Baby thinks a Magazine is a Broken iPad



La tecnologia come fattore abilitante:
g.co/projectglass



Il nuovo processo decisionale: Zero Moment of Truth



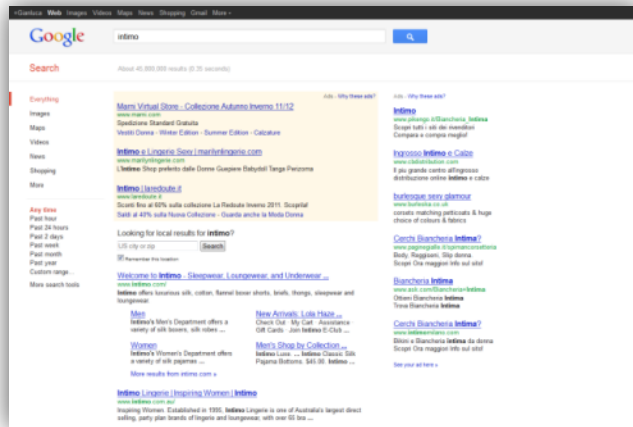
ZMOT: si moltiplicano i touchpoint con il consumatore



Video reviews...



Ricerca online...



Siti informativi...



Social...



Siti dei Retailers



Il processo decisionale è cambiato



Quali sono le fonti più efficaci e utili per trovare informazioni su prodotti o servizi che stai considerando di acquistare?

65%

Motori di ricerca

50%

Siti informativi

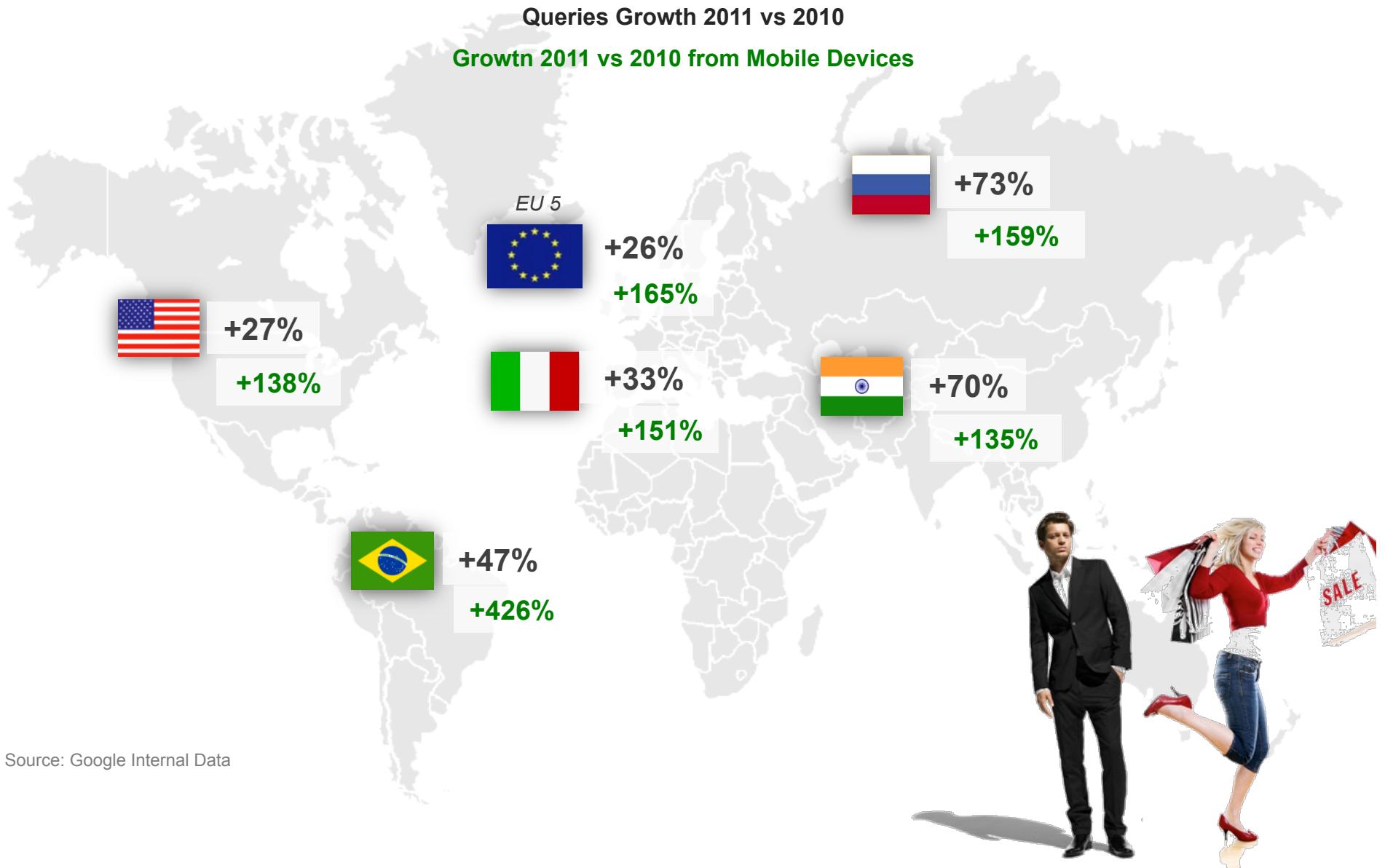
45%

Siti di Retailer

L'abbigliamento tra le categorie più cercate Online

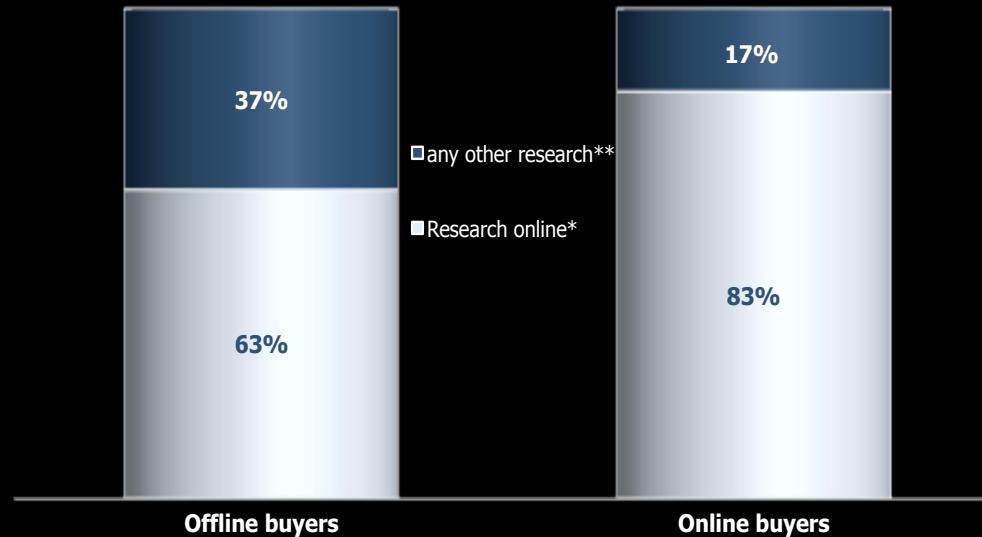
Queries Growth 2011 vs 2010

Growth 2011 vs 2010 from Mobile Devices



Source: Google Internal Data

ROPO: Ricerca Online/Acquisto Offline - fashion buyers



2/3

Offline fashion buyers ricercano Online, visitando in media 3.2 fashion websites!

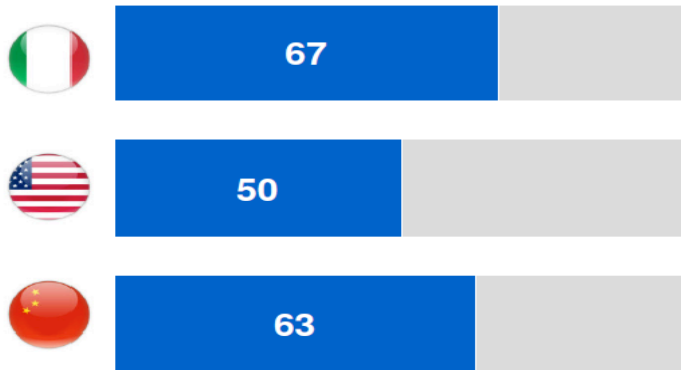
Gli online buyers visitano in media 4,4 Websites

*Research online: Usage of search engines and/or at least one fashion website visit.

**any other research: Including research at work and fashion websites that were not included in the analysis (e.g. eBay or long tail)

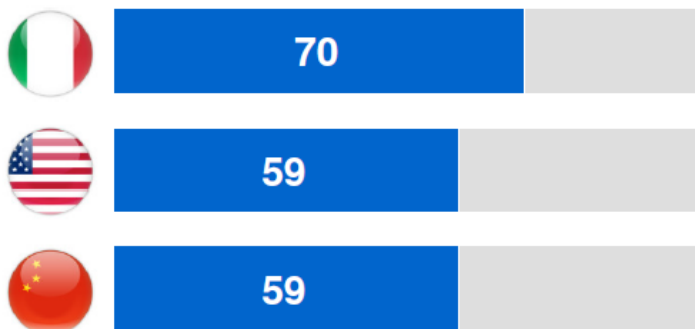
L'Online influenza l'Offline, e viceversa

Research Online - Purchase Offline

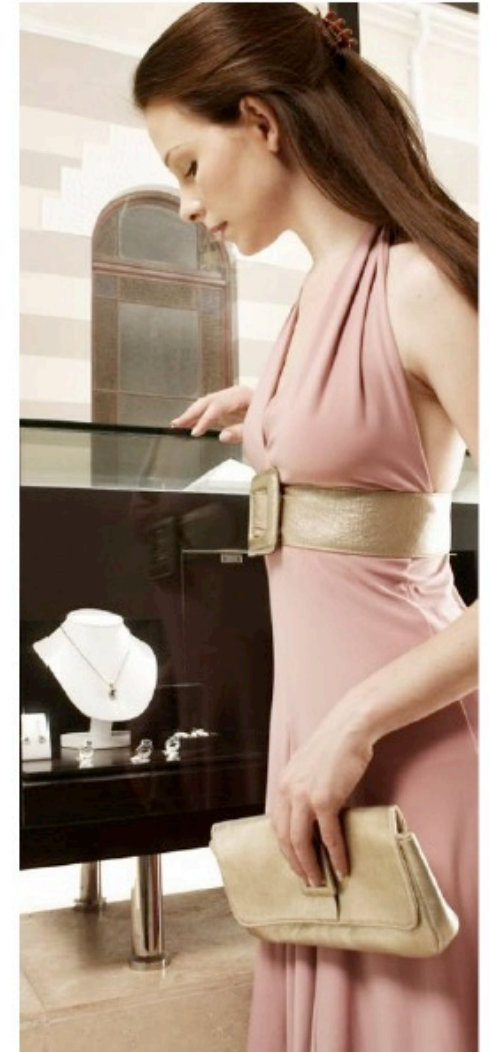


"For luxury items bought in stores in the last 12 months, did you do any research online?"

Research Offline - Purchase Online



"For the luxury items you bought online, did you do any research in-store?"



Il Consumatore Multi-Screen

Diversi Device per diversi Contesti

PC



Admin Workhorse

- At home or office
- Task-oriented
- Solitary experience

Tablet



Couch Companion

- Web surfing & shopping
- Entertainment
- Shared experience

Mobile



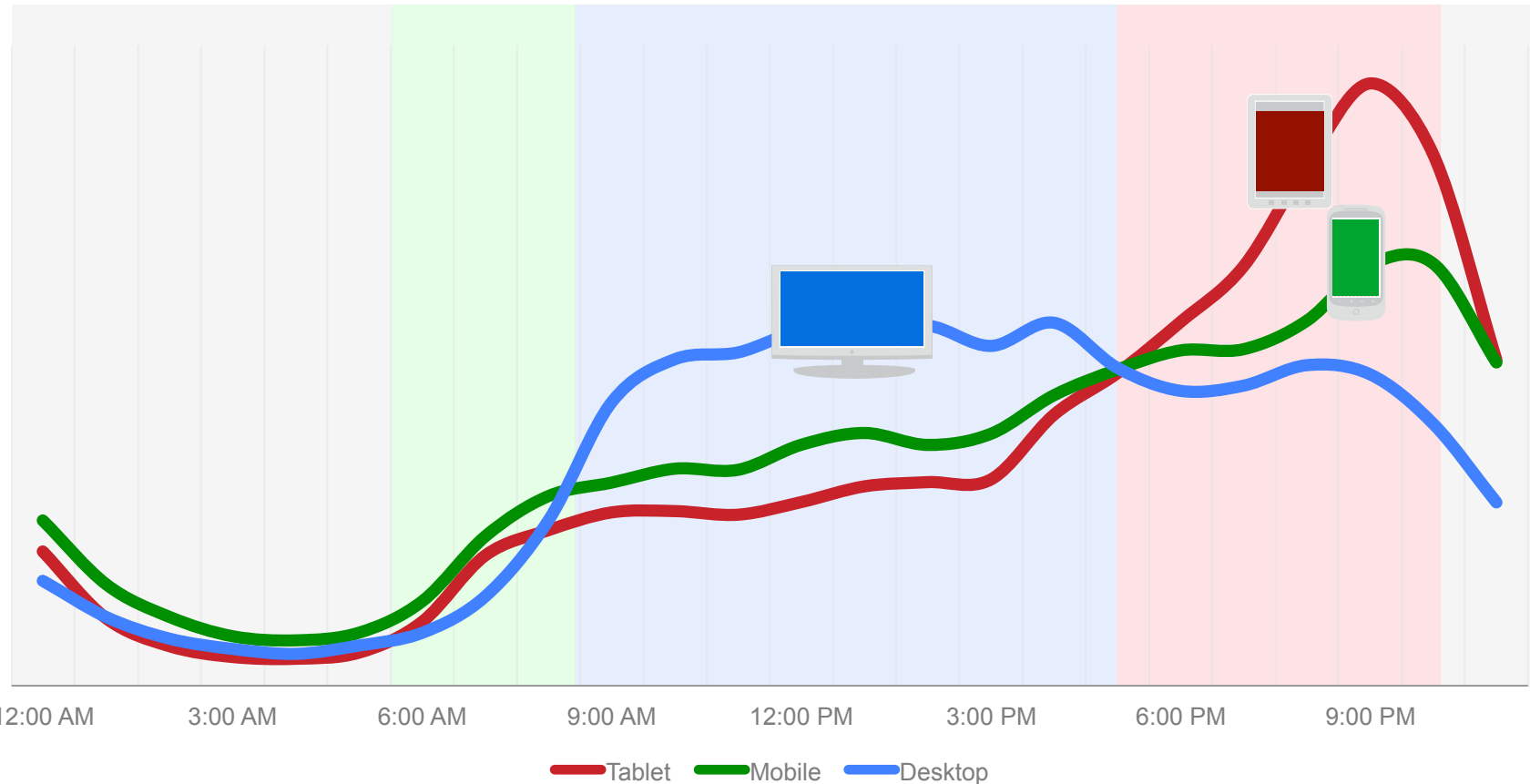
Constant Companion

- Always with you
- Location-specific
- In store
- Personal



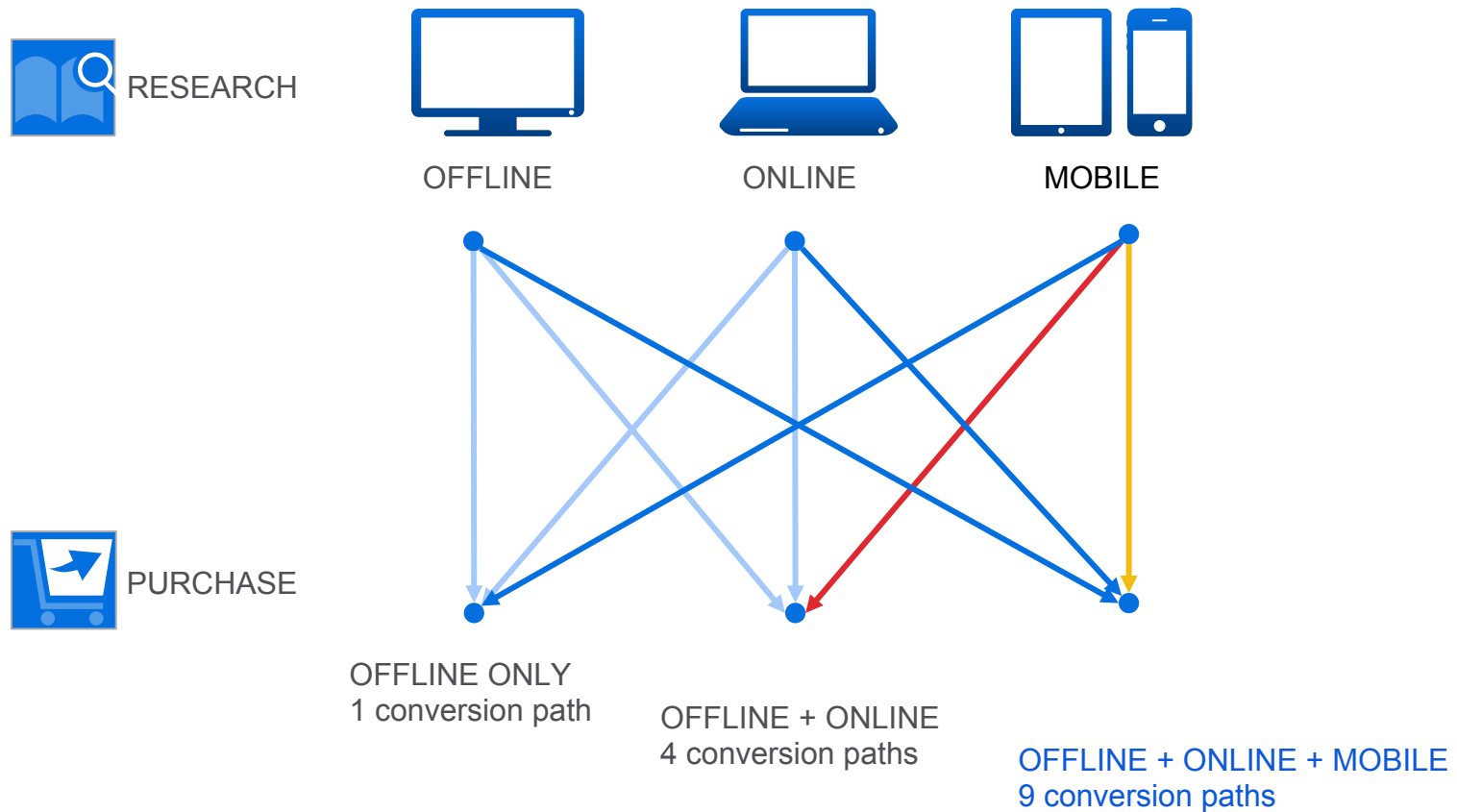
Mobile e Tablet complementari al Desktop

Hourly Distribution of Searches by Platform
(doesn't reflect absolute traffic volume)

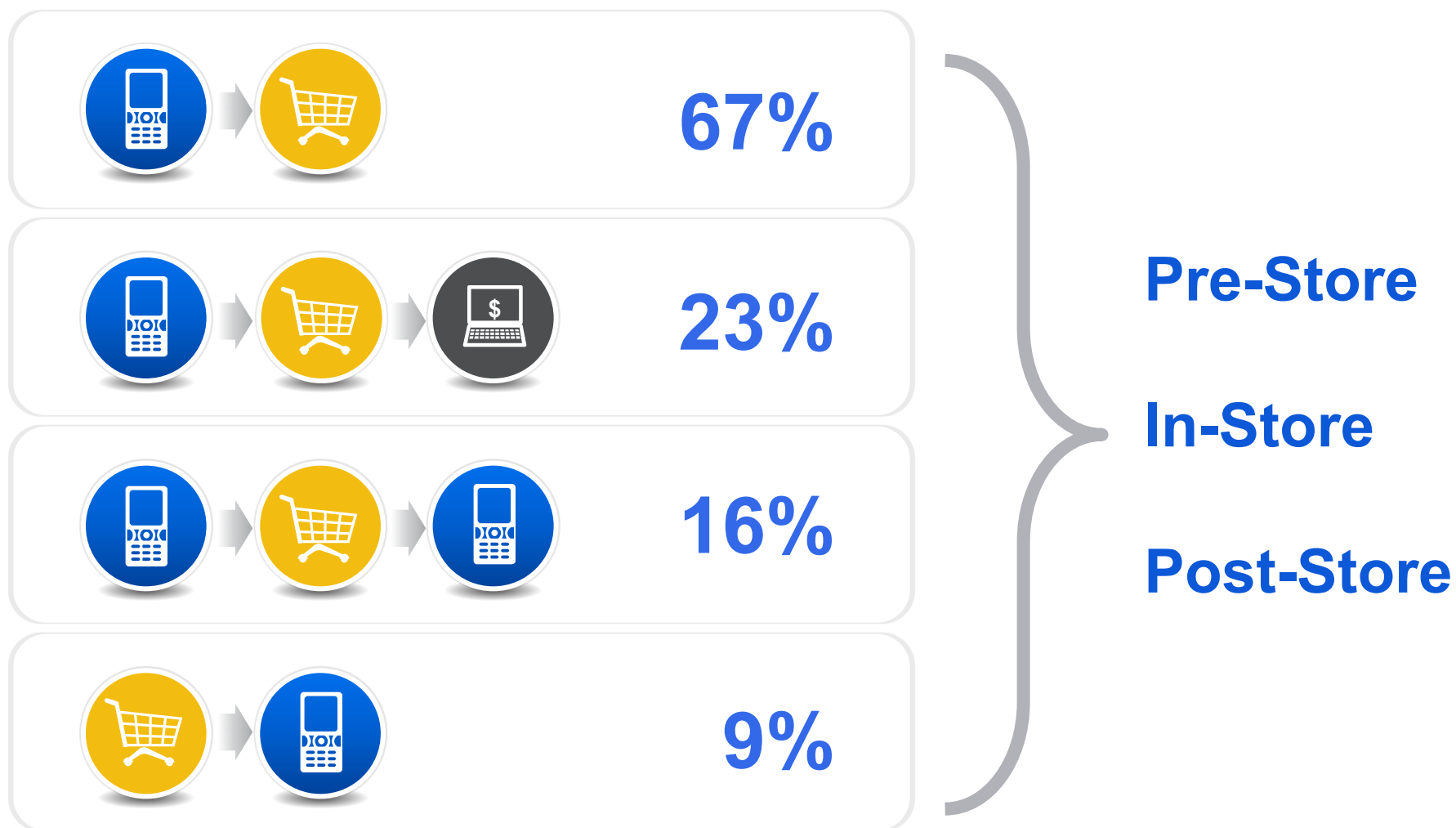


Source: Google Internal Data, 2011. % of each platform's traffic shown hourly for one day. Does not indicate absolute or relative traffic volumes.

Mobile & Tablet moltiplicano i possibili conversion path



Il Mobile è in ogni fase del processo di acquisto



Base: Have Used Smartphone to Help Shop or Purchase in Some Way (3533).
Q. Which of the following ways do you typically approach shopping with your smartphone?
Note: "None of these" (15%) excluded.

Il Mobile come Personal Shopping Assistant



57%

Utilizza il proprio Smartphone per la ricerca di prodotti Online



26%

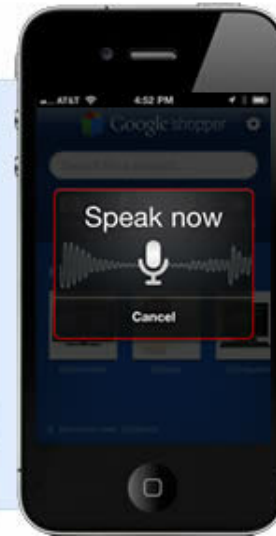
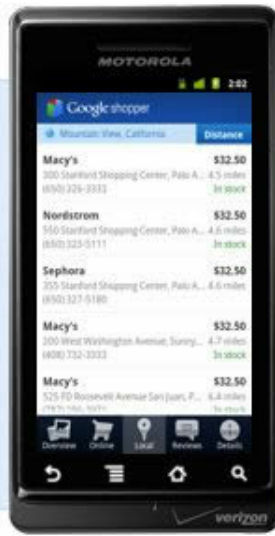
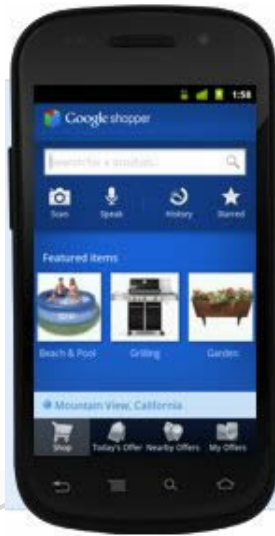
Porta con sè lo Smartphone durante lo shopping per ricercare informazioni/ comparare prezzi



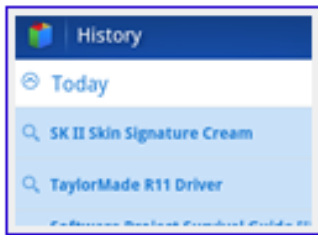
23%

Ha cambiato idea sull'acquisto di un prodotto in-store come risultato della ricerca di informazioni sul proprio Smartphone

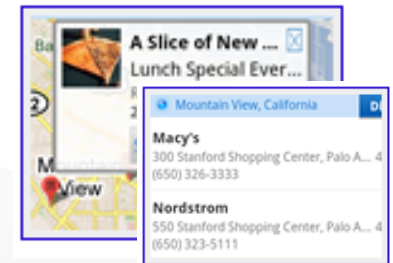
Google Shopper



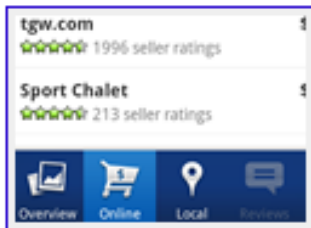
Save your history and favourites



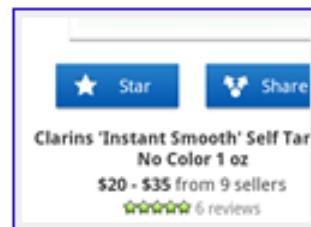
Nearby Offers & Local Stores



Online Prices



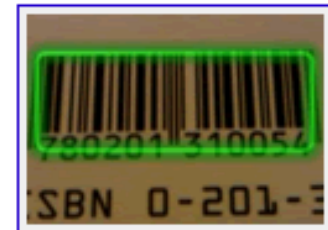
Detailed Product Information



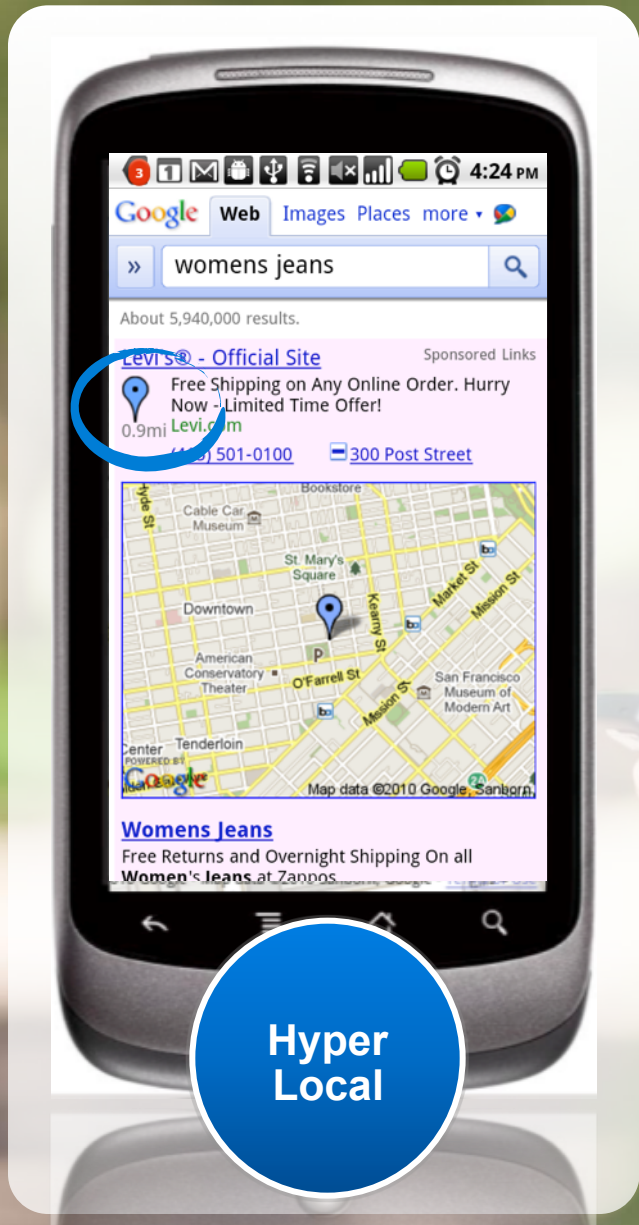
Share your finds with Firends



Barcode Scanning



Il Mobile è Local

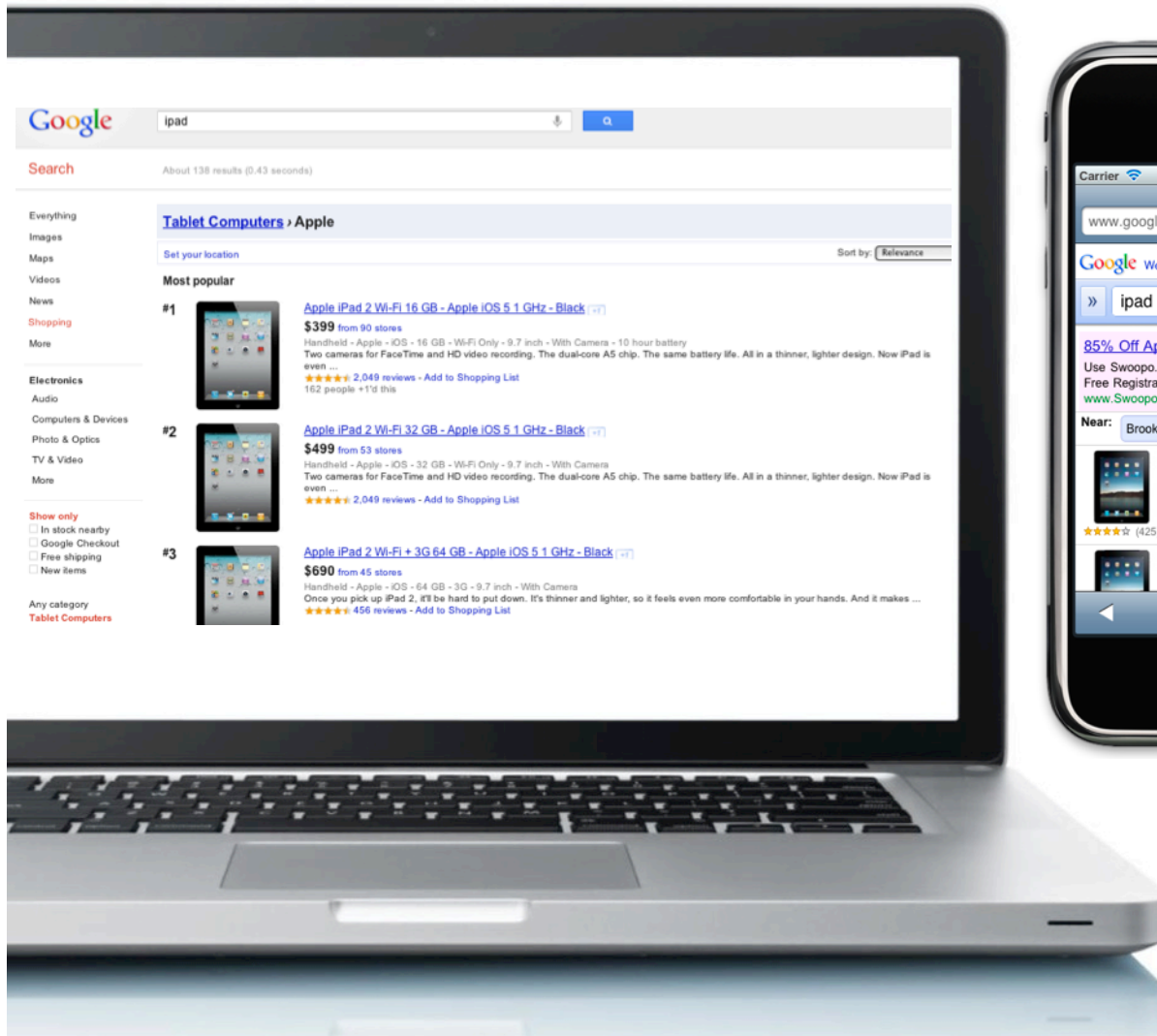


1 su 3
ricerche hanno
un obiettivo Local

Il Mobile è Local



Shopping: Online & Offline



Offer Ads

Ad - Why this ad?

Official Google Lava Lamps - Red, Blue, Green and More

lavalamps.google.com - ★★★★★ 682 seller reviews [+1](#)

Direct from the Googleplex . Free shipping.

View offer - 20% off green lava lamps



digital cameras

About 56,000,000 results (0.21 seconds)

[Advanced search](#)

- Everything
- Images
- Videos
- News
- Shopping
- More

Mountain View, CA
[Change location](#)

- All results
- Sites with images
 - Wonder wheel
 - Related searches
 - More search tools

Something different

Digital Cameras at Windy City Office Supply Ad
wcos.com Take Digital Pictures Like A Pro. Most Orders Over \$50 Ship Free.
\$15 off **digital camera** or camcorder purchase of \$75 or more
Expires Nov 15, 2011

Related searches for **digital cameras**:

Brands: [Olympus](#) [Canon](#) [Sony](#) [Nikon](#) [Kodak](#)

Stores: [Best Buy](#) [Overstock](#) [Ritz Camera](#) [Amazon](#) [BH](#)

Types: [waterproof](#) [slr](#) [touch screen](#) [underwater](#) [compact](#)

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Get 20% Off Our Wide Selection of Green Lava Lamps!

Offer valid **from Aug 1, 2011 through Sept 30, 2011**

Use coupon code **GF11** to receive 20% your purchase of all green lava lamps

Redeemable at [lavalamps.google.com](#) or all Google Store locations

This promotion is valid for the purchase of only green lava lamps - all other colors are excluded from this offer. Offer Valid from 8/1/2011 to 9/30/2011. No cash value. Offer from: [lavalamps.google.com](#). Google does not make any warranty in relation to the coupon, including without limitation its validity and value. Google is not a party to any transaction which advertiser and user may enter into.



Offer code: **GF11**

[? How My Offers works](#)

Google Catalogs | www.google.com/catalogs/about



La Sinergia tra Offline e Online | HomePlus (Tesco)



La sinergia tra Offline e Online | NET - A - PORTER.COM



Lo scenario futuro

- Consumer Behaviour & Tecnologia sono in continua evoluzione e creeranno nuove sfide e nuove opportunità
- Il Mobile è Personal Shopping Assistant ed influenza in modo significativo il processo di acquisto
- Online & Offline sono canali sinergici per promuovere le vendite. Il confine tra online e offline sarà sempre più sfumato
- **Creare esperienze di shopping innovative e uniche, sfruttando l'integrazione tra online e offline, sarà un fattore competitivo e distintivo determinante per il futuro**

Google™

Thank you!

