



TORINO 14-15 MAGGIO 2014

Web marketing e “Sistema Italia”: perché occorre una svolta



Massimo Giordani



alcuni dati

1980-1983

1984-1988

1989-1993

1994-1998

1999-2003

2004-2008

2009-2013

Country name

2009

2010

2011

2012

South Sudan

4.3

4.2

1.6

-47.6



Sudan

3.2

3.5

-3.3

-10.1



Guinea-Bissau

1.1

1.7

4.8

-6.7



Greece

-3.1

-4.9

-7.1

-6.4



Bermuda

-5.3

-2.1

-3.3

-4.9



Portugal

-2.9

1.9

-1.3

-3.2



Italy

-5.5

1.7

0.5

-2.5



Slovenia

-8.0

1.4

0.7

-2.5



Cyprus

-1.7

1.3

0.4

-2.4



Croatia

-6.9

-1.4

-0.9

-2.0



Dominica

5.9

1.0

-0.3

-1.7



Serbia

-3.5

1.0

1.6

-1.7



Hungary

-6.8

1.3

1.6

-1.7



Spain

-3.8

-0.2

0.1

-1.6



Swaziland

1.3

1.9

0.3

-1.5



1980-1983

1984-1988

1989-1993

1994-1998

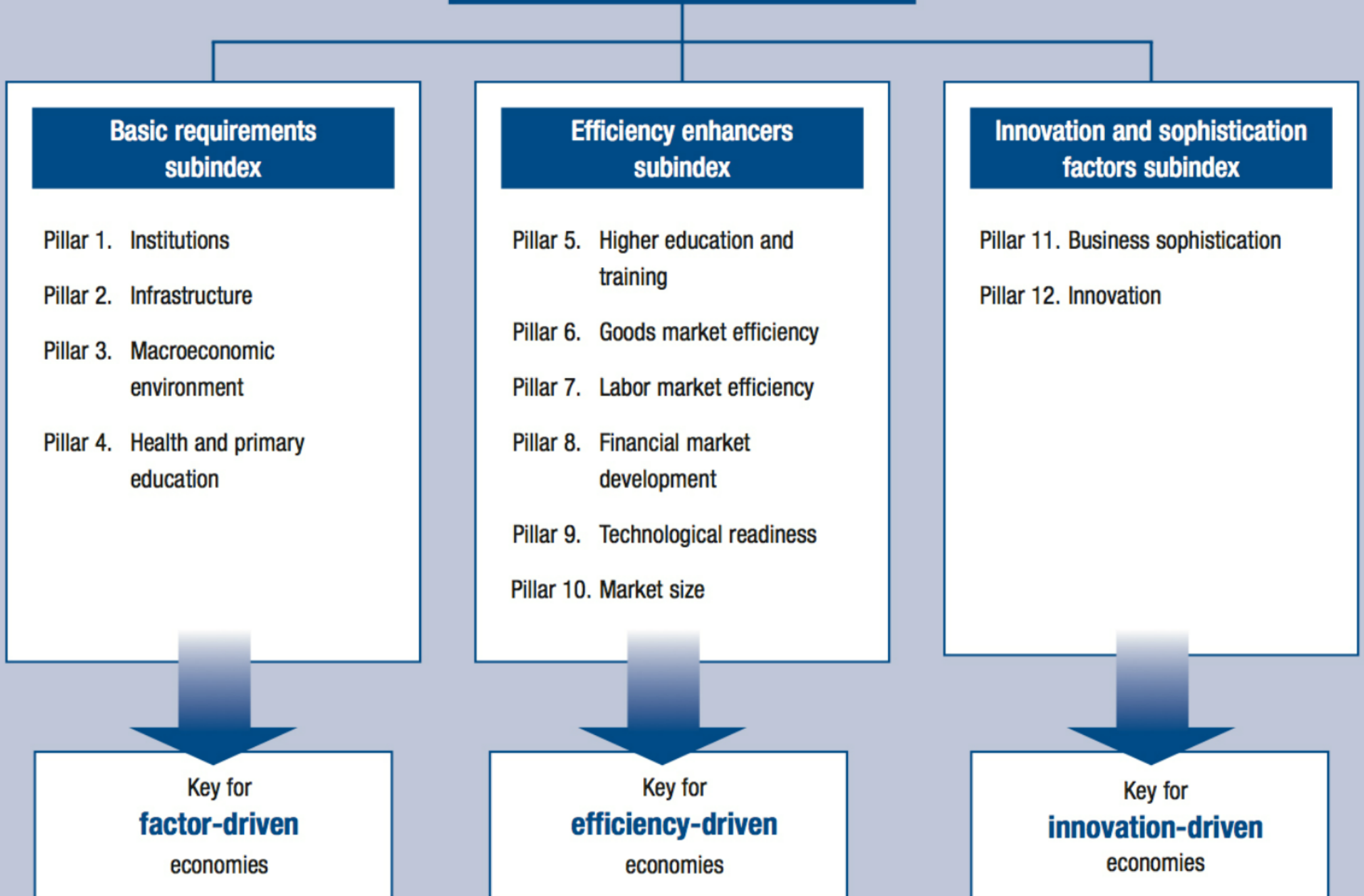
1999-2003

2004-2008

2009-2013

Country name	2009	2010	2011	2012	
Sierra Leone	3.2	5.4	6.0	15.2	
Afghanistan	21.0	8.4	6.1	14.4	
Mongolia	-1.3	6.4	17.5	12.3	
Turkmenistan	6.1	9.2	14.7	11.1	
Niger	-0.7	8.4	2.3	10.8	
Panama	3.9	7.5	10.8	10.7	
Liberia	13.8	10.9	9.1	10.2	
Burkina Faso	3.0	7.9	4.2	10.0	
Macao SAR, China	1.7	27.5	21.8	9.9	
Cote d'Ivoire	3.7	2.4	-4.7	9.5	
Bhutan	6.7	11.7	8.5	9.4	
Chad	4.2	13.6	0.1	8.9	
Ethiopia	8.8	9.9	7.3	8.5	
Iraq	5.8	5.9	8.6	8.4	
Uzbekistan	8.1	8.5	8.3	8.2	
Lao PDR	7.5	8.5	8.0	8.2	
Papua New Guinea	5.5	8.0	9.0	8.0	
Rwanda	6.2	7.2	8.2	8.0	
Ghana	4.0	8.0	15.0	7.9	
China	9.2	10.4	9.3	7.8	
Mauritania	-1.2	5.1	4.0	7.6	
Tajikistan	3.5	6.5	7.4	7.5	
Mozambique	6.3	7.1	7.3	7.4	
Zambia	6.0	7.6	6.8	7.3	
Cambodia	0.1	6.0	7.1	7.3	

GLOBAL COMPETITIVENESS INDEX



GCI 2013–2014

Country/Economy	Rank (out of 148)	Score (1–7)	Rank among 2012–2013 economies*	GCI 2012–2013
Switzerland	1	5.67	1	1
Singapore	2	5.61	2	2
Finland	3	5.54	3	3
Germany	4	5.51	4	6
United States	5	5.48	5	7
Sweden	6	5.48	6	4
Hong Kong SAR	7	5.47	7	9
Netherlands	8	5.42	8	5
Japan	9	5.40	9	10
United Kingdom	10	5.37	10	8
.....				
Malta	41	4.50	41	47
Poland	42	4.46	42	41
Bahrain	43	4.45	43	35
Turkey	44	4.45	44	43
Mauritius	45	4.45	45	54
Czech Republic	46	4.43	46	39
Barbados	47	4.42	47	44
Lithuania	48	4.41	48	45
Italy	49	4.41	49	42

PILLAR 7: LABOR MARKET EFFICIENCY

Country/Economy	Labor market efficiency overall rank	Subpillar A: Flexibility	Subpillar B: Efficient use of talent
Switzerland	2	4	1
United Kingdom	5	10	3
Denmark	13	17	18
Sweden	18	57	9
Finland	20	74	8
Netherlands	21	50	15
Germany	41	113	11
France	71	116	46
Spain	115	123	95
Greece	127	125	114
Italy	137	135	134

Global Rank	Country/Region	Q4 '13 Avg. Mbps	QoQ Change	YoY Change
3	Netherlands	12.4	-0.7%	38%
5	Switzerland	12.0	3.8%	27%
6	Czech Republic	11.4	0.7%	30%
7	Sweden	10.5	13%	30%
9	Ireland	10.4	8.4%	59%
11	Belgium	9.8	0.6%	42%
12	Denmark	9.5	4.0%	31%
13	United Kingdom	9.4	3.3%	29%
14	Finland	9.1	6.7%	24%
15	Austria	9.0	-3.0%	30%
17	Norway	8.7	4.1%	24%
19	Israel	8.2	-0.5%	26%
21	Germany	7.7	1.0%	20%
23	Poland	7.5	1.4%	31%
24	Russia	7.4	-5.4%	34%
29	Romania	7.2	-8.0%	-1.5%
30	Hungary	6.9	3.1%	10%
32	Spain	6.6	-3.8%	32%
33	Slovakia	6.6	-2.8%	9.6%
35	France	6.6	0.8%	35%
42	Portugal	6.0	2.8%	18%
46	Italy	5.2	7.7%	25%
53	Turkey	4.3	8.2%	53%
56	United Arab Emirates	4.2	-7.8%	-27%
97	South Africa	2.3	3.7%	14%

Akamai Q4 2013 - Average Connection Speed by EMEA Country

Questi dati testimoniano la **gravità** della
situazione italiana

Il cambiamento è **sempre** stato parte della vita umana

ma con tempi e modalità

molto diverse da quelle odierne

ma con tempi e modalità
molto diverse da quelle odierne

Oggi occorre essere **fluidi**, capaci di **adattarsi** alla **rapidità** dei cambiamenti di una società che **non può più stare ad aspettare** che le decisioni vengano prese dagli **stakeholder** tradizionali

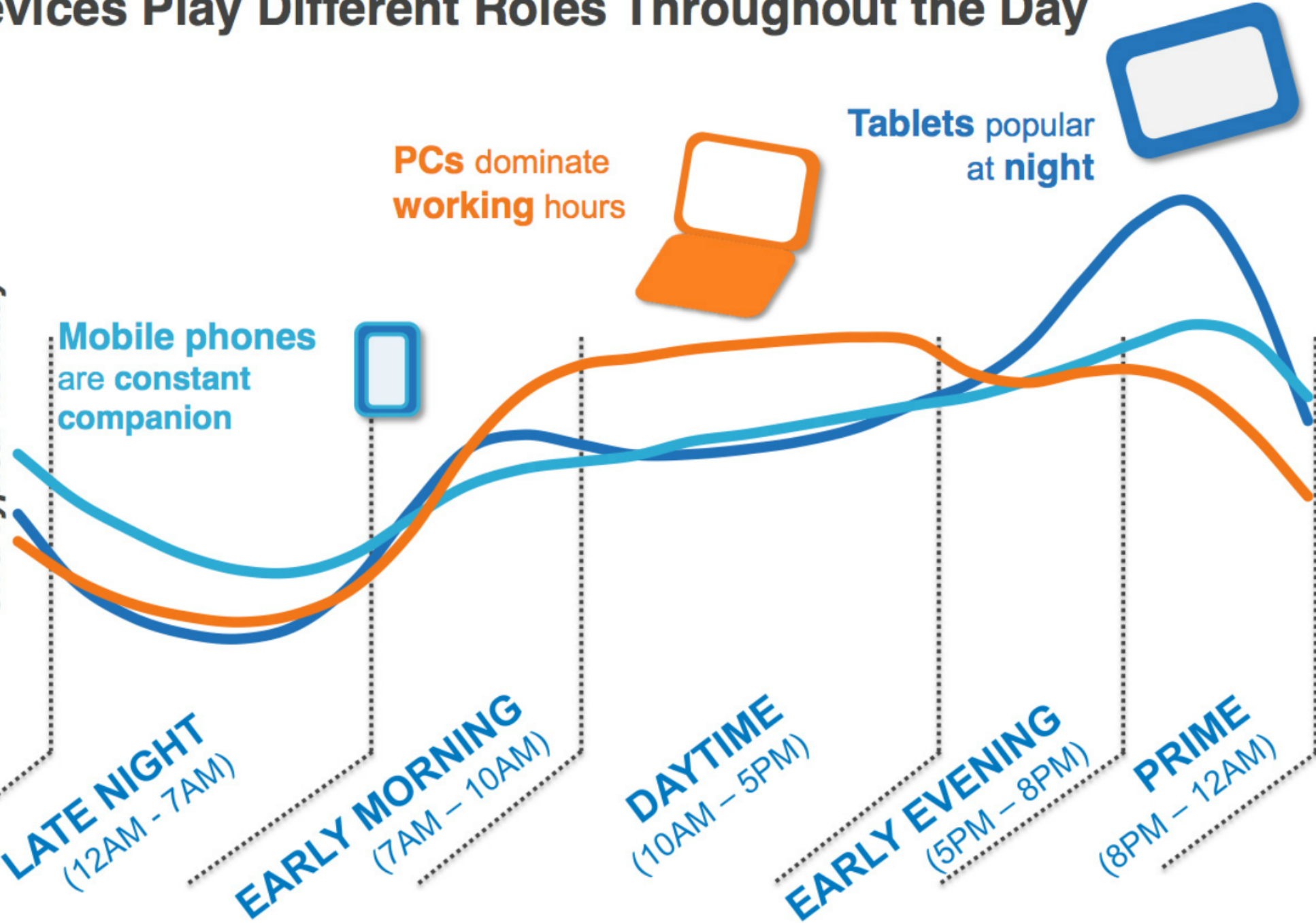
Per cogliere le **opportunità** che offre l'**innovazione**
occorre entrare in una logica "**glocale**"

Tutto ciò passa attraverso processi di
comunicazione

La comunicazione è stata **profondamente influenzata** dalla diffusione pervasiva dei **media digitali** e dei sempre più numerosi dispositivi connessi al web che quotidianamente utilizziamo

Devices Play Different Roles Throughout the Day

Share of Device Page Traffic on a Typical Workday



L'evoluzione digitale della nostra società ha avuto, e avrà ancor più nei prossimi anni, **impatti profondi sulla comunicazione e, quindi, sulle relazioni...**

...non solo fra esseri umani

Occorre esaminare alcuni dati

Capire i trend in atto!

DIGITAL



INTERACTIVE

THE PAST

Source: David Armano, Edelman 2012, edelmandigital.com

DIGITAL MEDIA



ONLINE

DIGITAL BUSINESS



TRANSACTIONAL

THE PRESENT

SOCIAL



HUMAN

SOCIAL MEDIA

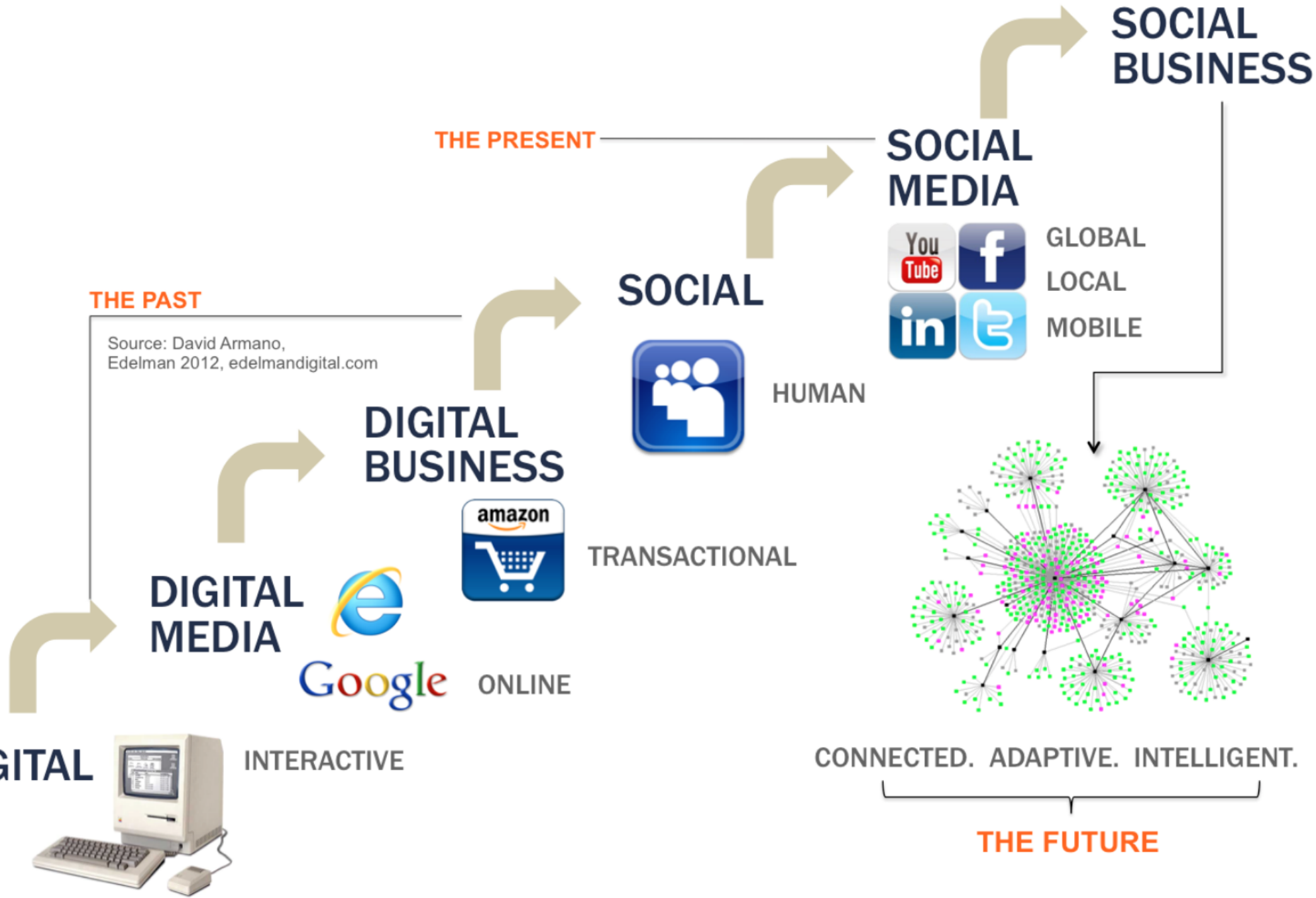


GLOBAL
LOCAL
MOBILE

SOCIAL BUSINESS

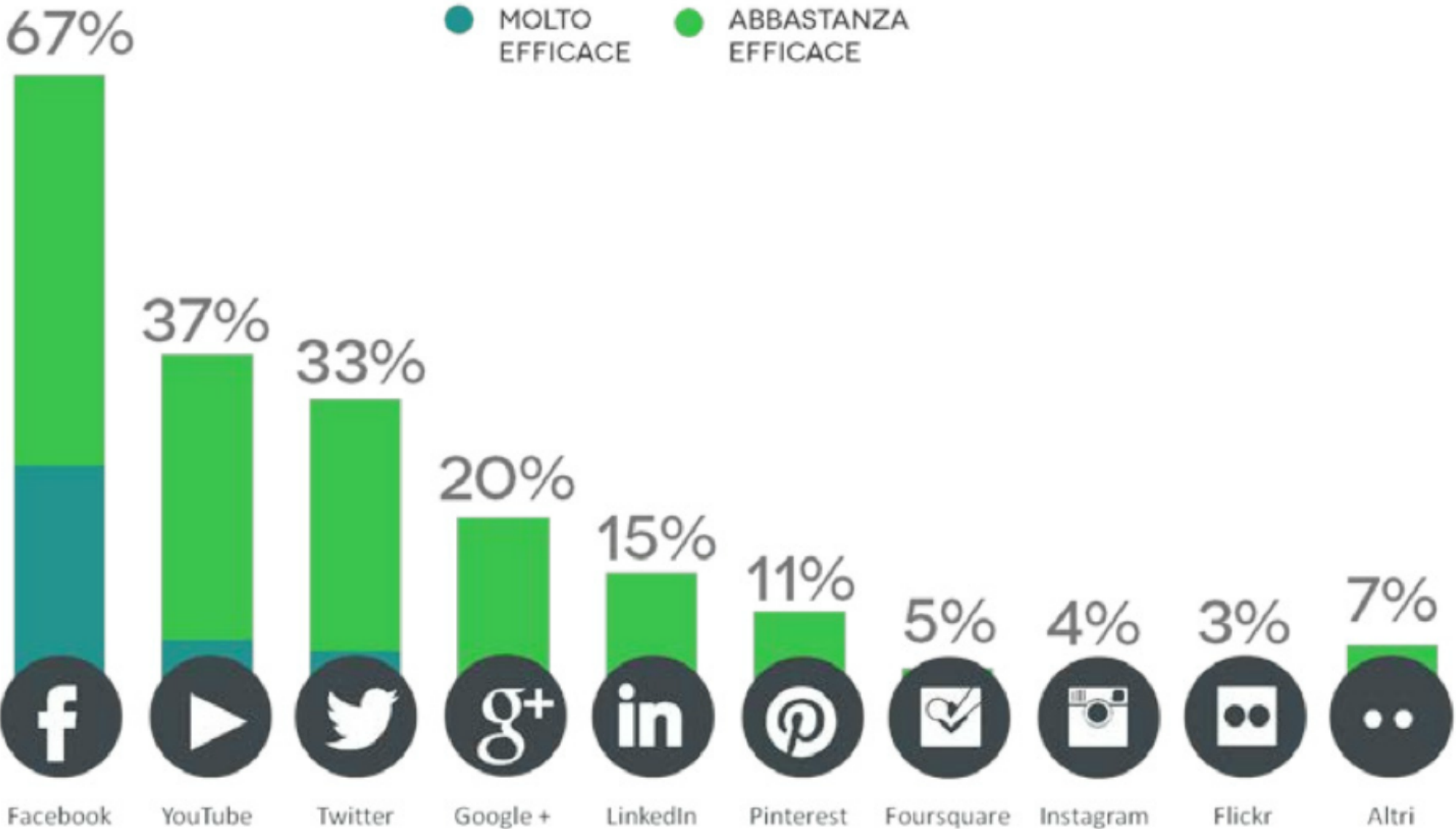
CONNECTED. ADAPTIVE. INTELLIGENT.

THE FUTURE

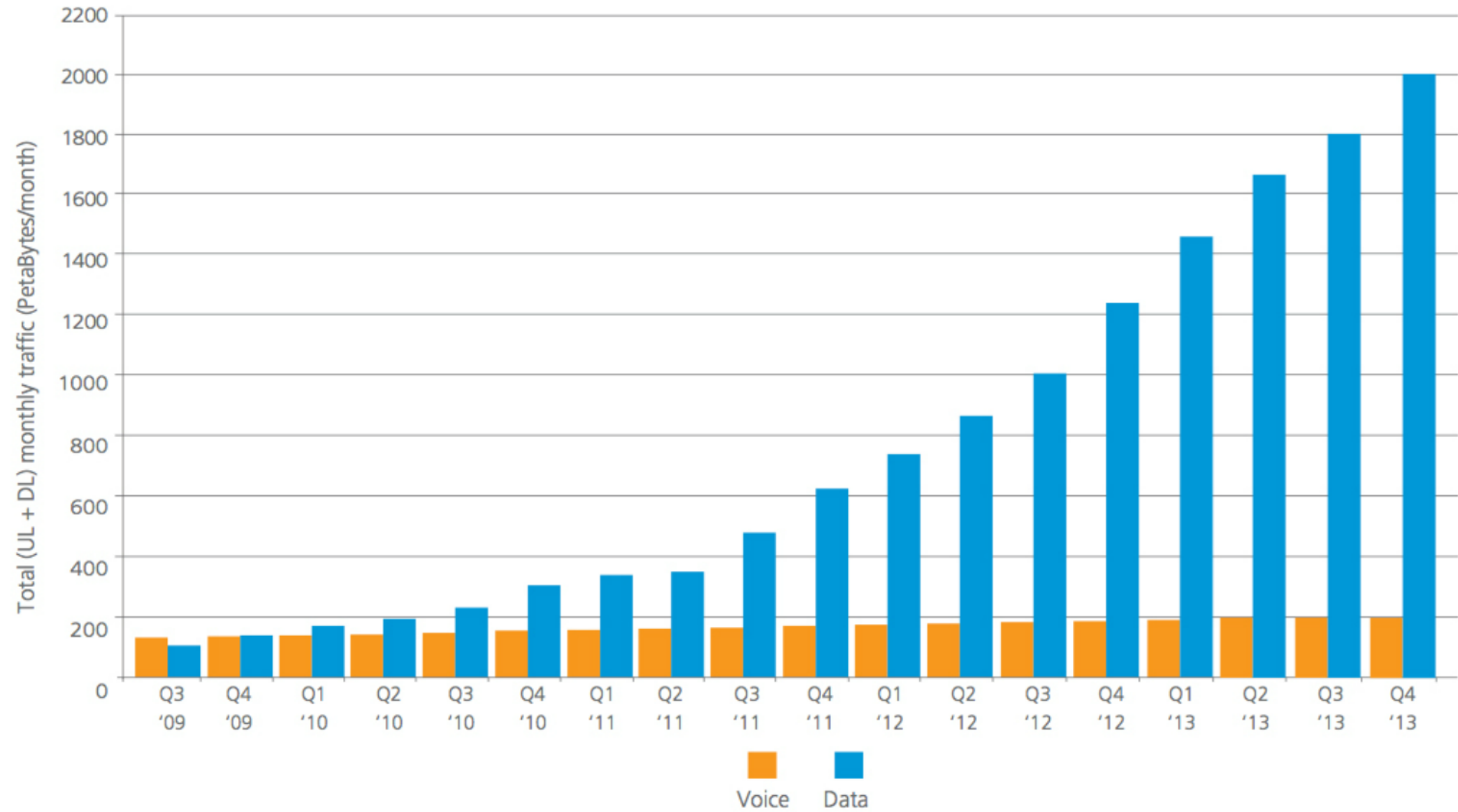


Volano gli utenti dei social network nel mondo, uno su quattro li usa

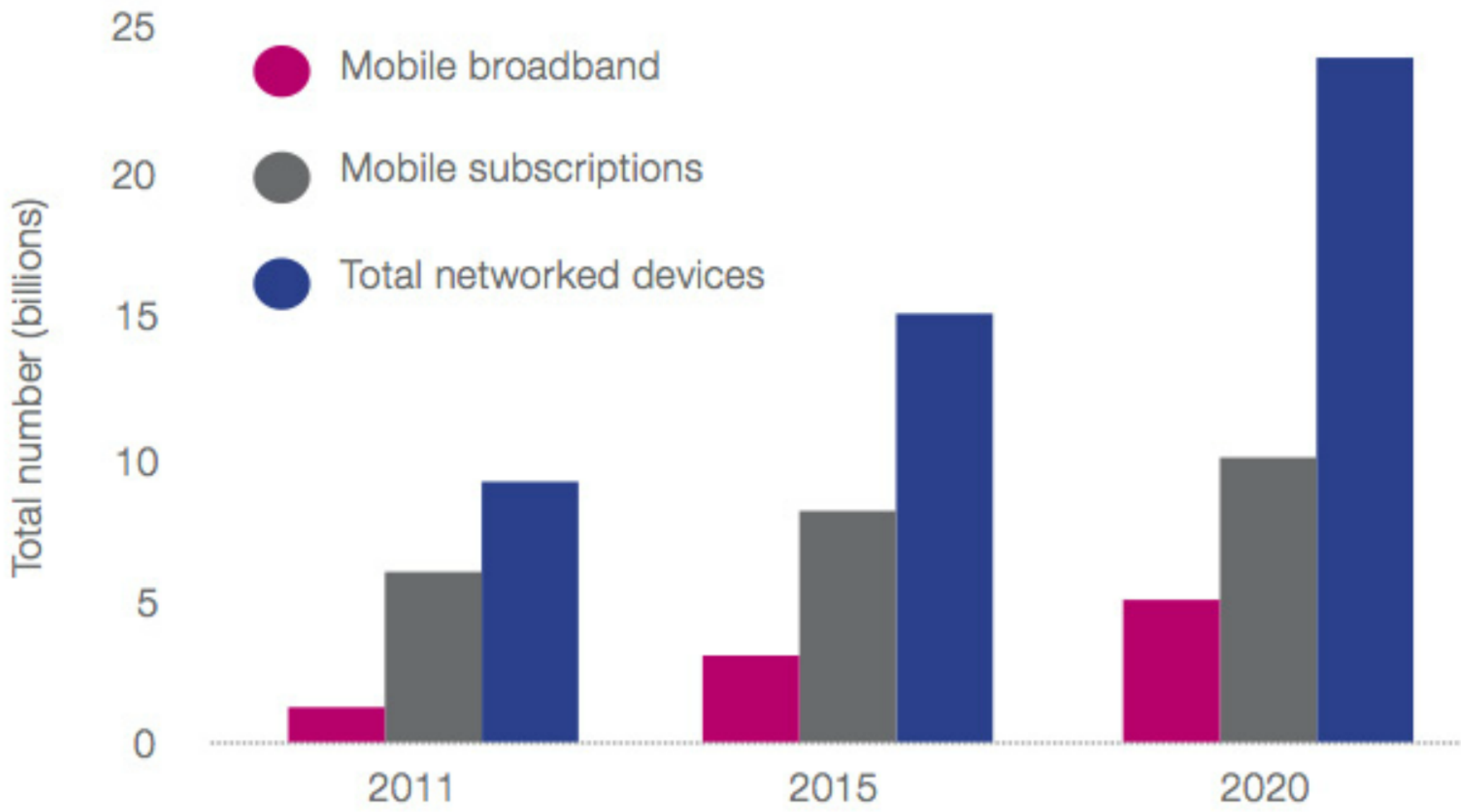
EFFICACIA DEI SOCIAL MEDIA



FONTE: CASALEGGIO ASSOCIATI, 2013

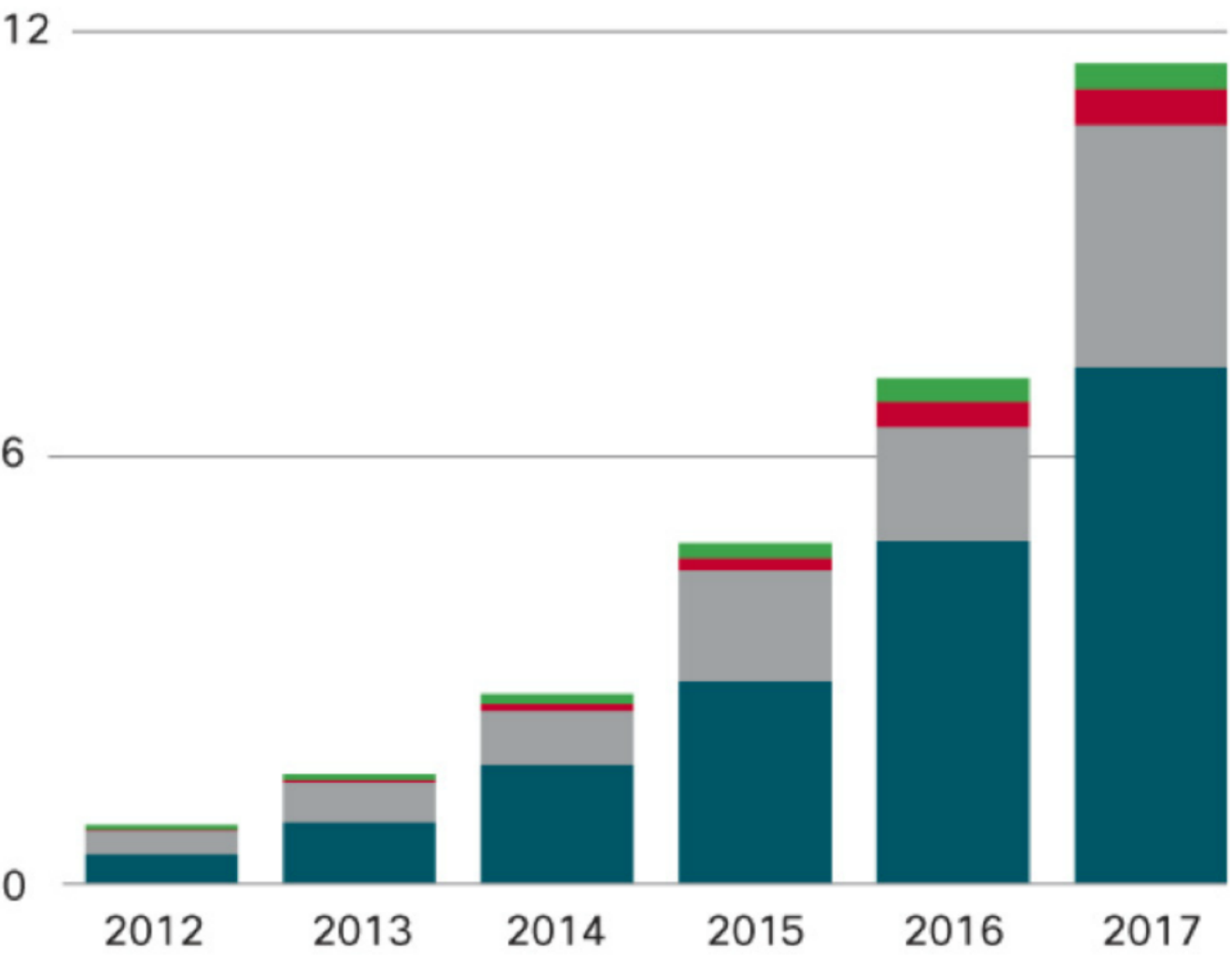


Total Monthly Mobile Voice and Data as Measured by Ericsson



Exabytes per Month

66% CAGR 2012-2017



- Mobile File Sharing (3.5%)
- Mobile M2M (5.1%)
- Mobile Web/Data (24.9%)
- Mobile Video (66.5%)

Figures in legend refer to traffic share in 2017.

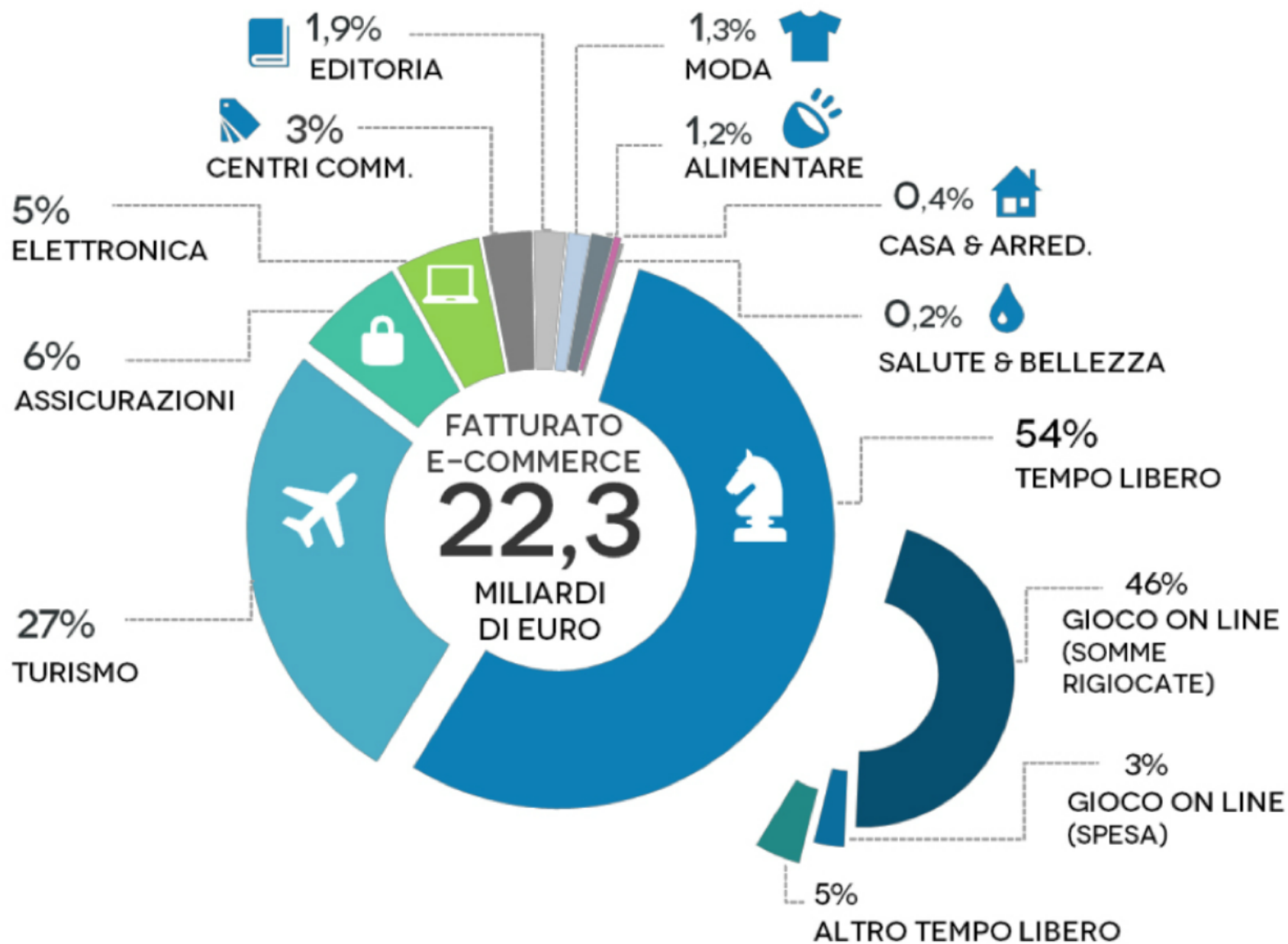
Source: Cisco VNI Mobile Forecast, 2013

Tutto ciò apre opportunità nuove e

gigantesche!

Per esempio, l'e-commerce

LA DISTRIBUZIONE DEI FATTURATI NEL 2013



APR
2014

CHAT APPS: USER NUMBERS

WHATSAPP
MONTHLY
ACTIVE USERS



465M

WECHAT
MONTHLY
ACTIVE USERS



355M

LINE
REGISTERED
USERS



400M

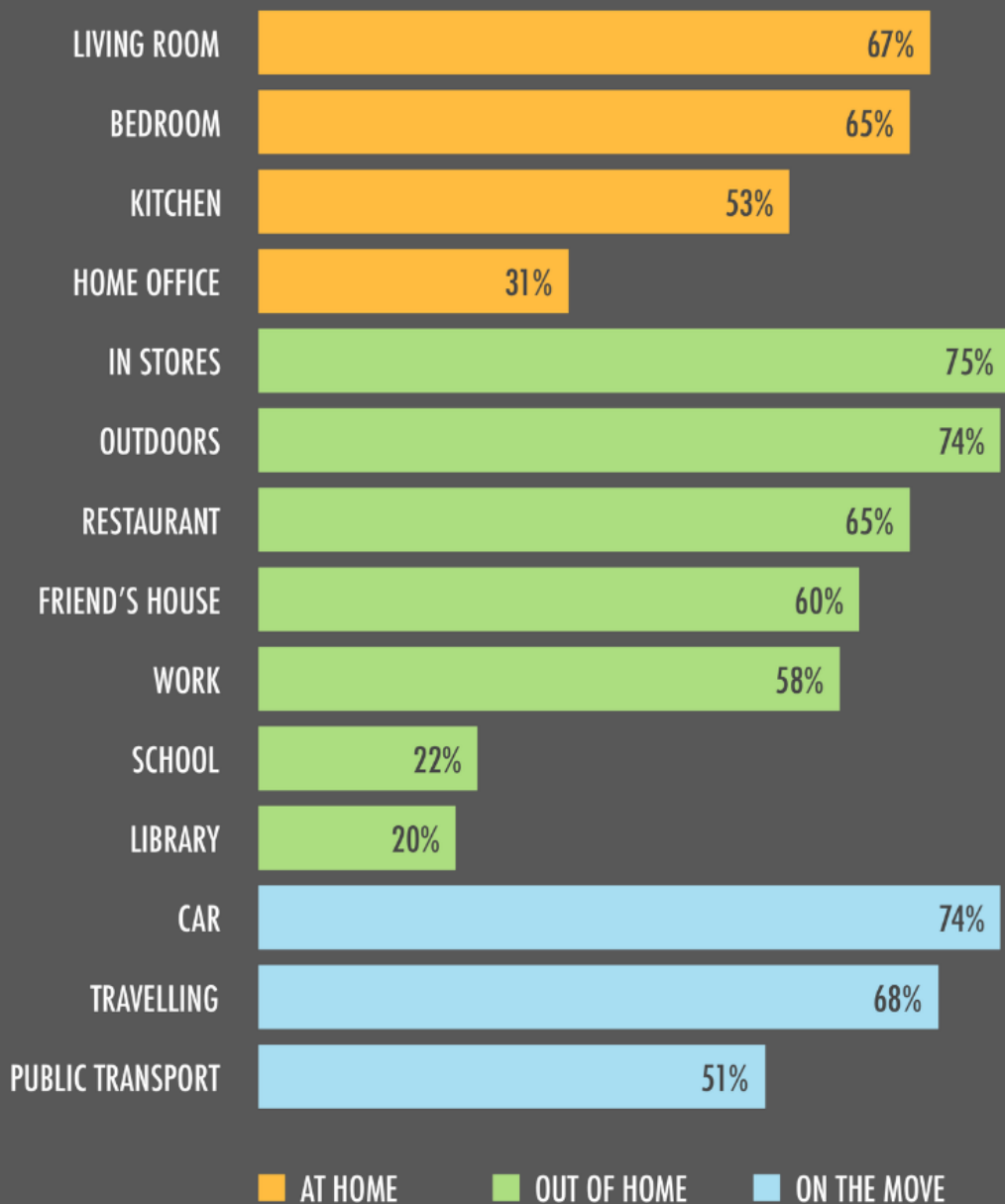
KAKAOTALK
REGISTERED
USERS



133M

FEB
2013

MOBILE WEB USE LOCATIONS



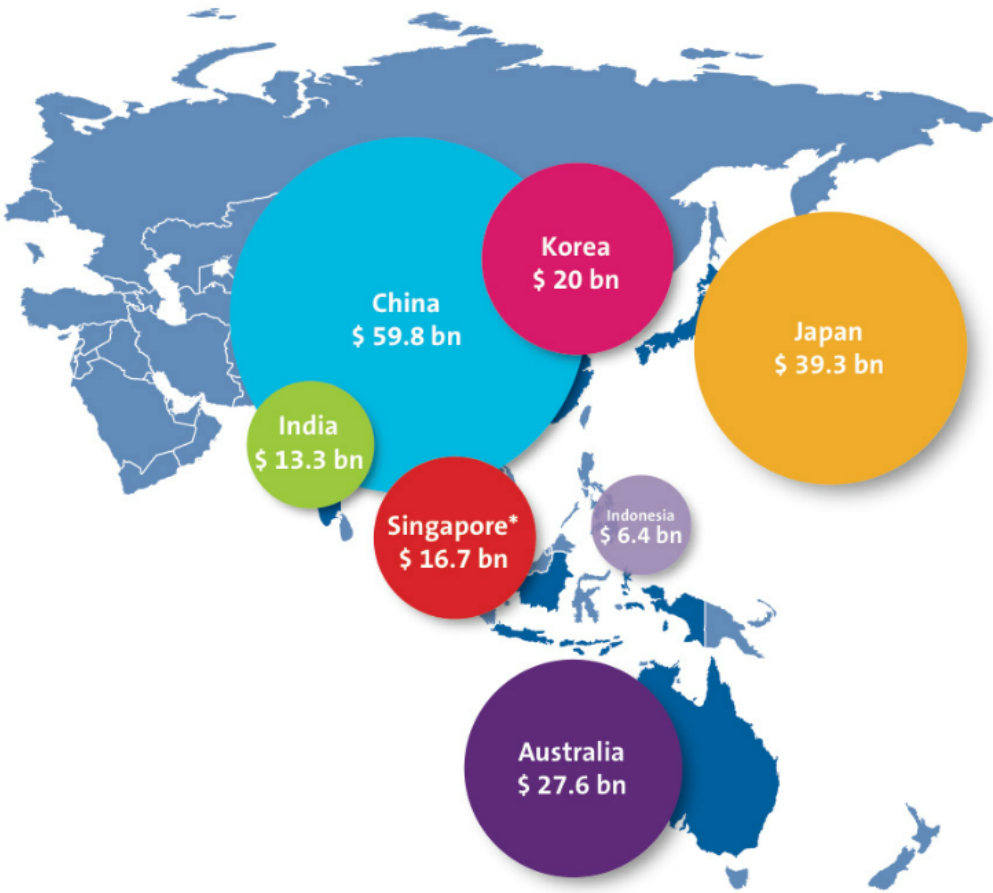
FIGURES REPRESENT THE PERCENTAGE OF US SMARTPHONE INTERNET USERS WHO ACCESS THE INTERNET VIA THEIR SMARTPHONE IN EACH LOCATION.
SOURCE: FORRESTER'S "NORTH AMERICAN TECHNOGRAPHICS ONLINE BENCHMARK SURVEY" (DEC 2012) AS CITED BY EMARKETER

Tutto ciò si traduce in miliardi di

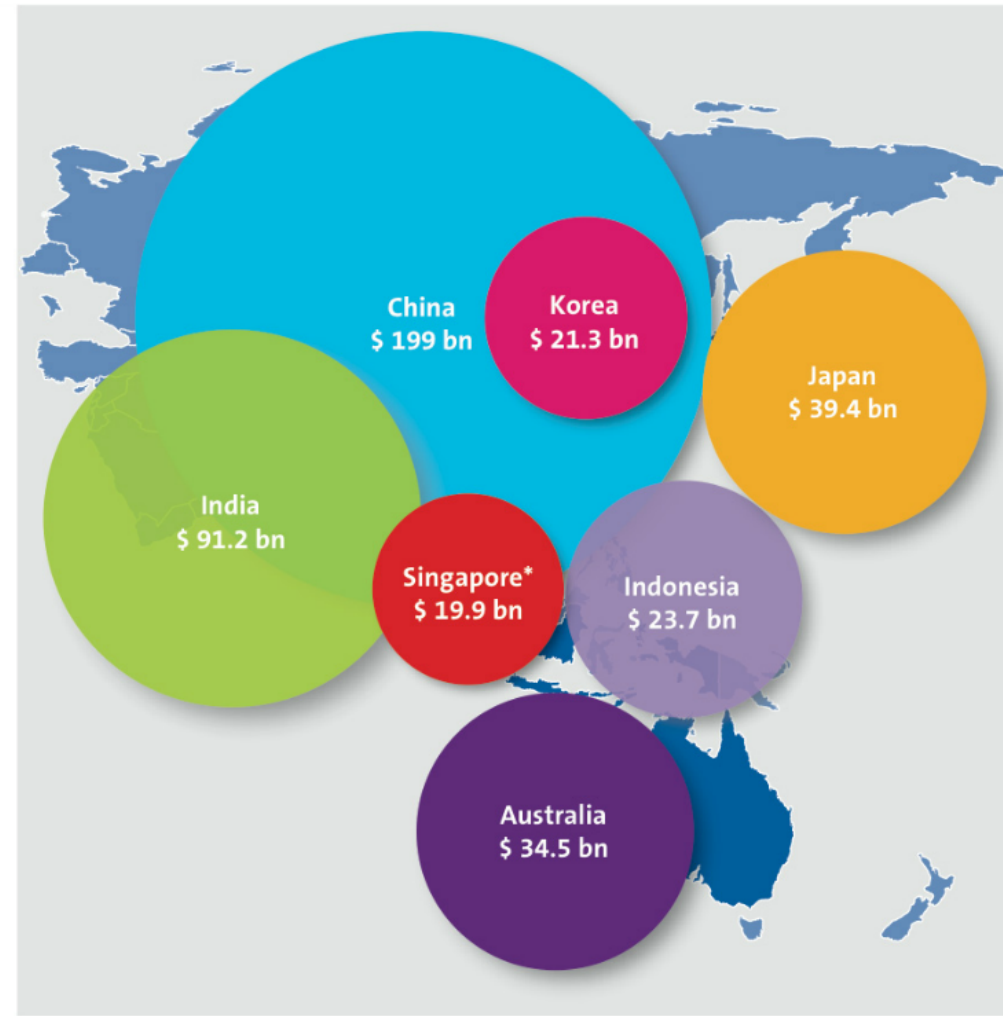


di fatturato

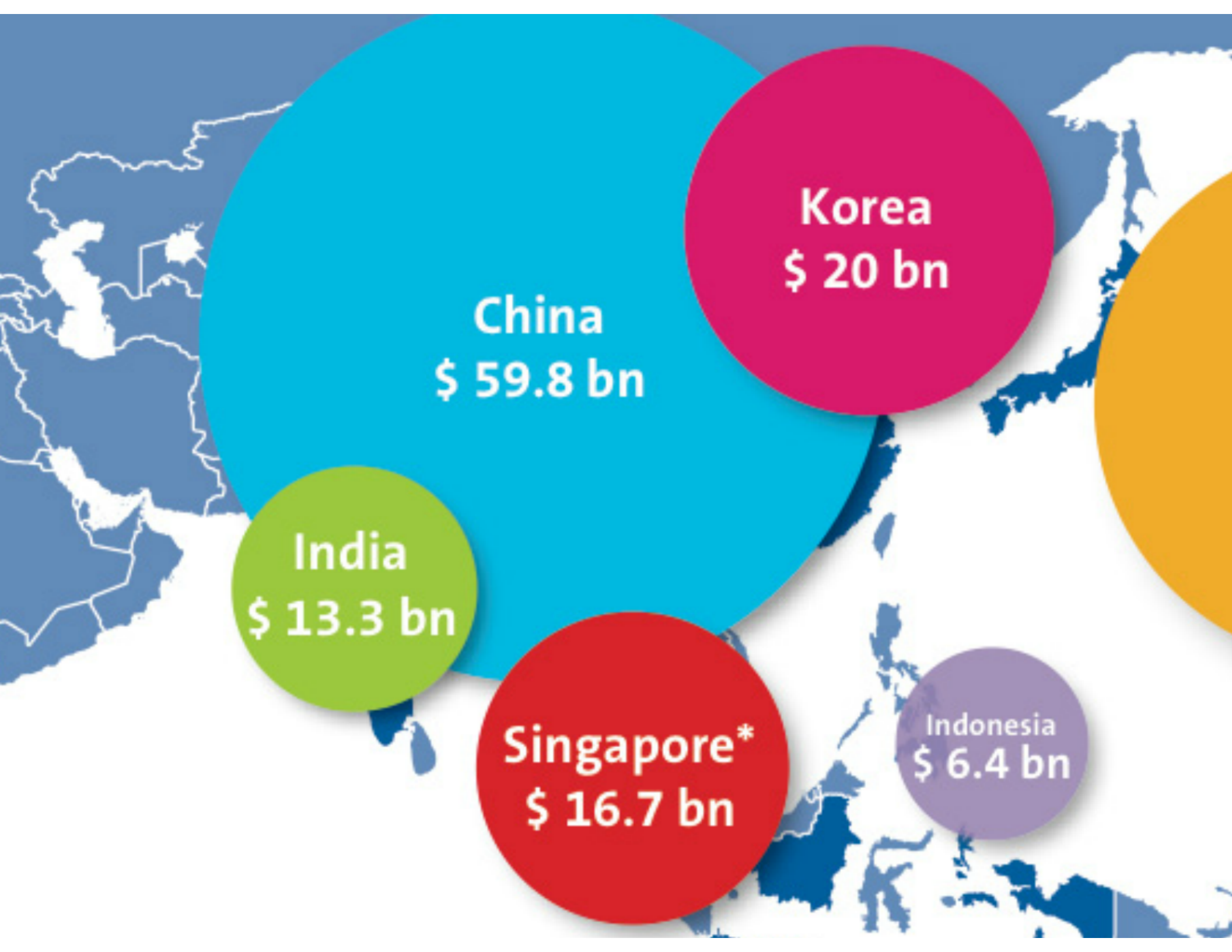
a partire dal settore turistico



Source: PATA Tourism Monitor 2012, WTO Compendium of Tourism Statistics
 *Excludes Singaporean visitors to Malaysia



Source: Frost & Sullivan estimates. Assumes no change to average expenditure per trip
 *Excludes Singaporean visitors to Malaysia



China
\$ 59.8 bn

Korea
\$ 20 bn

India
\$ 13.3 bn

Singapore*
\$ 16.7 bn

Indonesia
\$ 6.4 bn

The infographic features a light blue background with a faint world map. Five large, overlapping circles in various colors (green, red, purple, pink, yellow) are arranged across the page. Each circle contains the name of a country and its market value in billions of dollars. The circles are: a large green circle on the left for India, a red circle at the bottom center for Singapore, a purple circle at the bottom right for Indonesia, a pink circle at the top right for Korea, and a yellow circle on the far right edge. The text is white and centered within each circle.

China
\$ 199 bn

Korea
\$ 21.3 bn

India
\$ 91.2 bn

Singapore*
\$ 19.9 bn

Indonesia
\$ 23.7 bn

Le **parole chiave** per cogliere queste **opportunità** sono:

- **strategie digitali**
- **web marketing**
- **content management**
- **social networking**
- **e-commerce**
- **CRM**
- **...**

Le aziende devono **integrare**
il mondo digitale nel loro **DNA**

In un mondo che offre queste
opportunità, vogliamo continuare
a parlare di

crisisi?

Buon social networking!

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