



SOCIAL LUXURY INDEX

Milan, 13th November 2019



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AGENDA



**1. The
Social Luxury
Index**



**2. Key
results and
Insights**



**3. Conclusions
and next
challenges**

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THE FIRST **SOCIAL LUXURY INDEX**

For the first time **Altagamma** plays a direct role as luxury industry association in measuring its **social media impact**, also as possible contributor to **Made in Italy** success.

Accenture partnered with Altagamma to design the Social Luxury Index and track the performance through a dedicated platform.

Our **ambition** is to actively contribute to **improve the social performance of Altagamma's members** over time.



SCOPE OF THE ANALYSIS



- The analysis focuses on **2018 spontaneous public conversations (mentions)** on top global social media and most relevant blogs.
- **No** tracking of **proprietary member accounts** nor **paid** social media investments were considered.
- **Altagamma** social impact equals the **sum of its members** social media activities for the 8 Altagamma categories.



SOURCES OF THE ANALYSIS



Facebook



Twitter



Instagram



LinkedIn



Pinterest



YouTube



Sina Weibo



VK



WeChat



Blogs



2018

1st January – 31st December

8 categories

of Altagamma members

**5 Millions
relevant
mentions**

9 languages



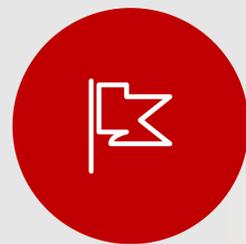
**1 Leading tech
platform**



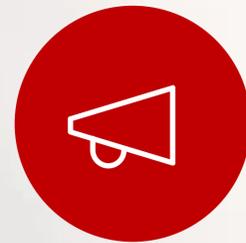


FIVE INDEX PILLARS

The index is made up of **5 pillars**. Each Altagamma category is assigned a **0 to 10** score for each pillar according to members' performance.



SOCIAL PRESENCE



SHARE OF VOICE



SENTIMENT ANALYSIS



REACH & ENGAGEMENT



TOP AUTHORS RESONANCE



"MADE IN ITALY" FOCUS ANALYSIS



The study presents a deep dive on **Altagamma members'** **social media** association with "**Made in Italy**".

The analysis considers all spontaneous public conversations (mentions) that mention at least one **Altagamma member in conjunction** with **Made in Italy Top keywords**. (e.g. #stileitaliano #italiancraftmanship), highlighting both the contribution of Altagamma members to "Made in Italy" awareness and the use of Made in Italy as a social media positioning enhancer for Altagamma members.

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2018 RESULTS

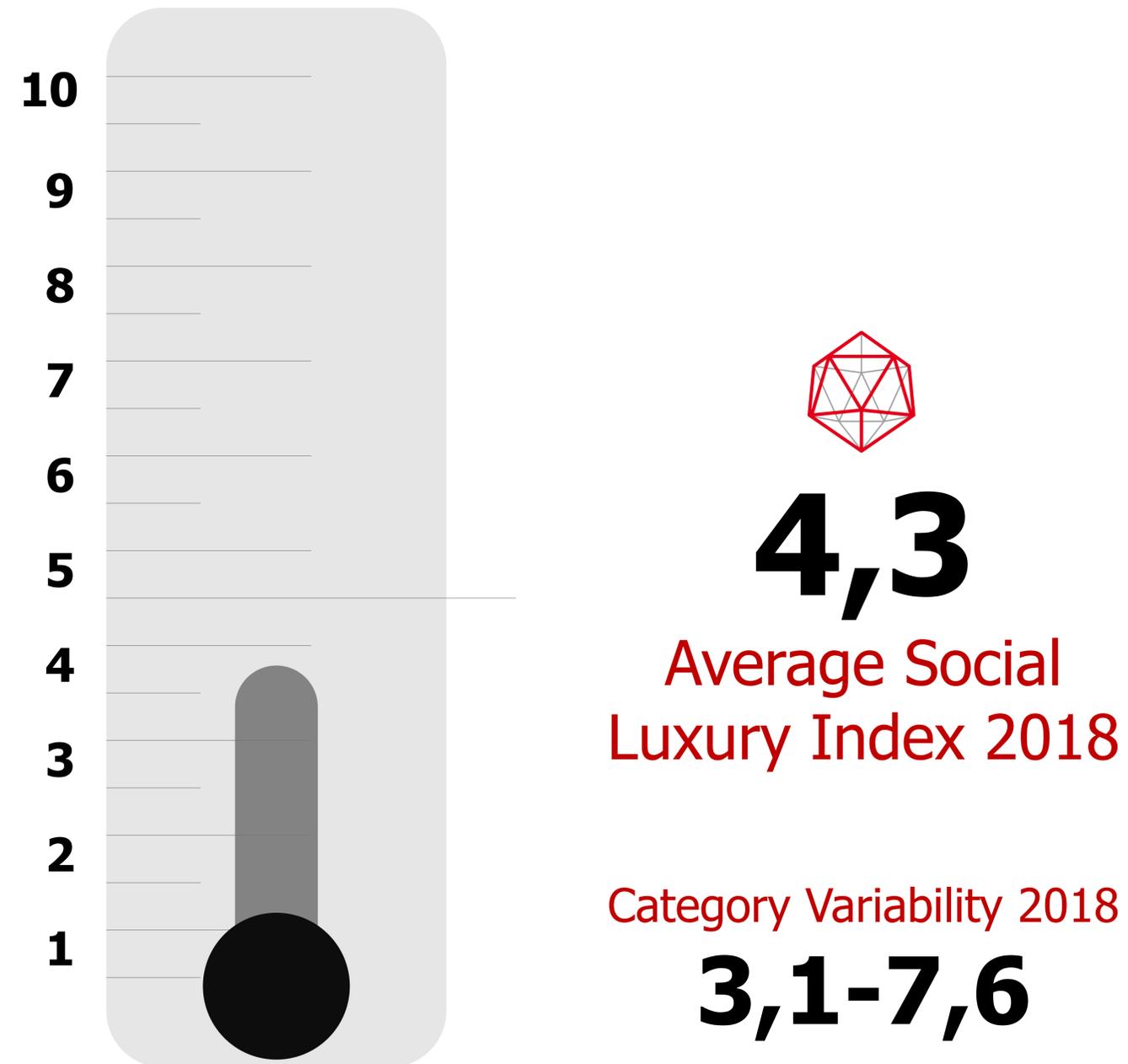


ALTAGAMMA
CREATIVITÀ E CULTURA ITALIANA

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accenture

SOCIAL LUXURY INDEX RESULTS 2018



2018 is the **year zero** of the Social Luxury Index era and serves as a **benchmark** for **future monitoring**.

The score is the **average of 5 pillars** each analyzed for **8 Altagamma categories**.

Through the analysis we will see substantial **differences** among **Categories** and **Pillars**, thus indicating the opportunity to

- perform the social benchmarking at Category Level for the different brands
- identify Category specific strategies / actions to grow the Social Luxury Index

INSIGHTS 2018

1.

~90%

**OF CONVERSATIONS ARE RELATED TO FASHION AND
AUTOMOTIVE MEMBERS. OTHER CATEGORIES SHOULD
TRY TO CATCH UP ON SOCIAL MEDIA BUZZ**

Fashion

Automotive

Others

Hard Luxury

Design

Food

Hotellerie

Yacht

3.161 k
63%

1.723 k
26%

85 k
7%

46 k
1%

42 k
1%

39 k
0,5%

23 k
0,2%

8.4 k
0,1%

25
Brands

6
Brands

5
Brands

6
Brands

19
Brands

18
Brands

15
Brands

8
Brands

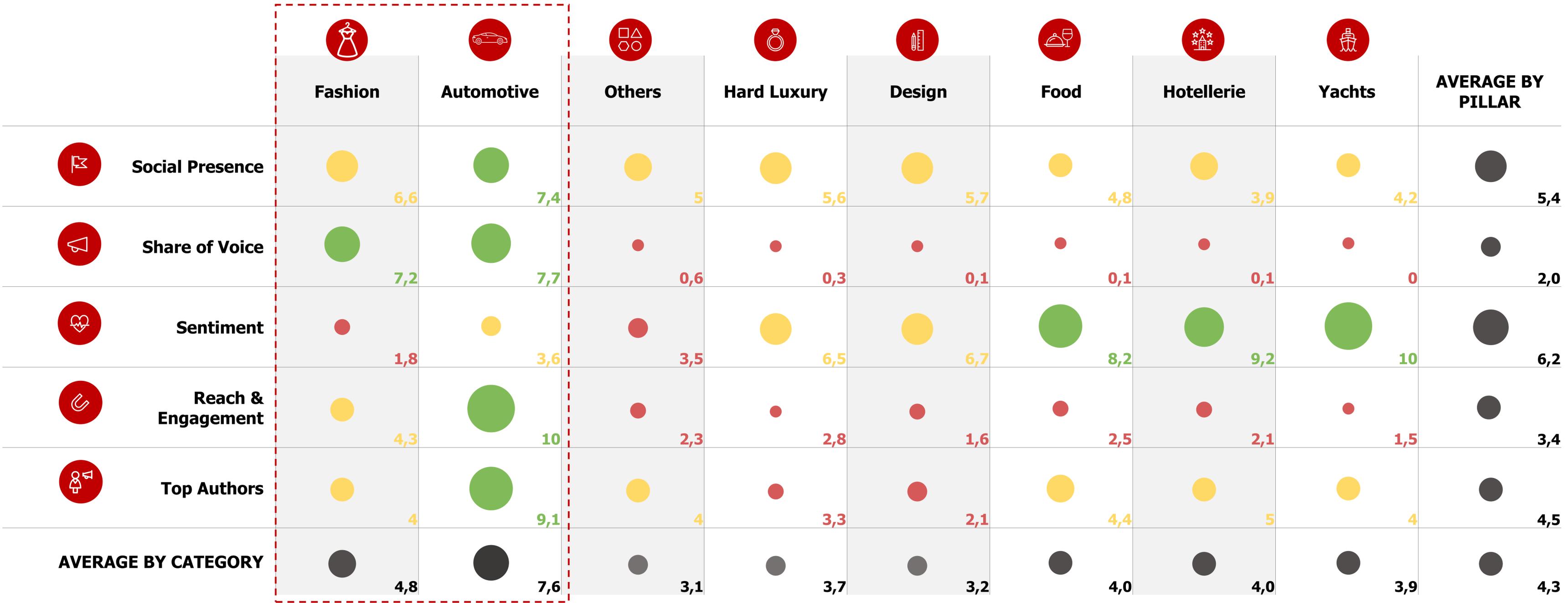


INSIGHTS 2018

2.

**DIFFERENT "SOCIAL" PRIORITIES AND
AREAS OF IMPROVEMENT FOR DIFFERENT
ALTAGAMMA CATEGORIES**

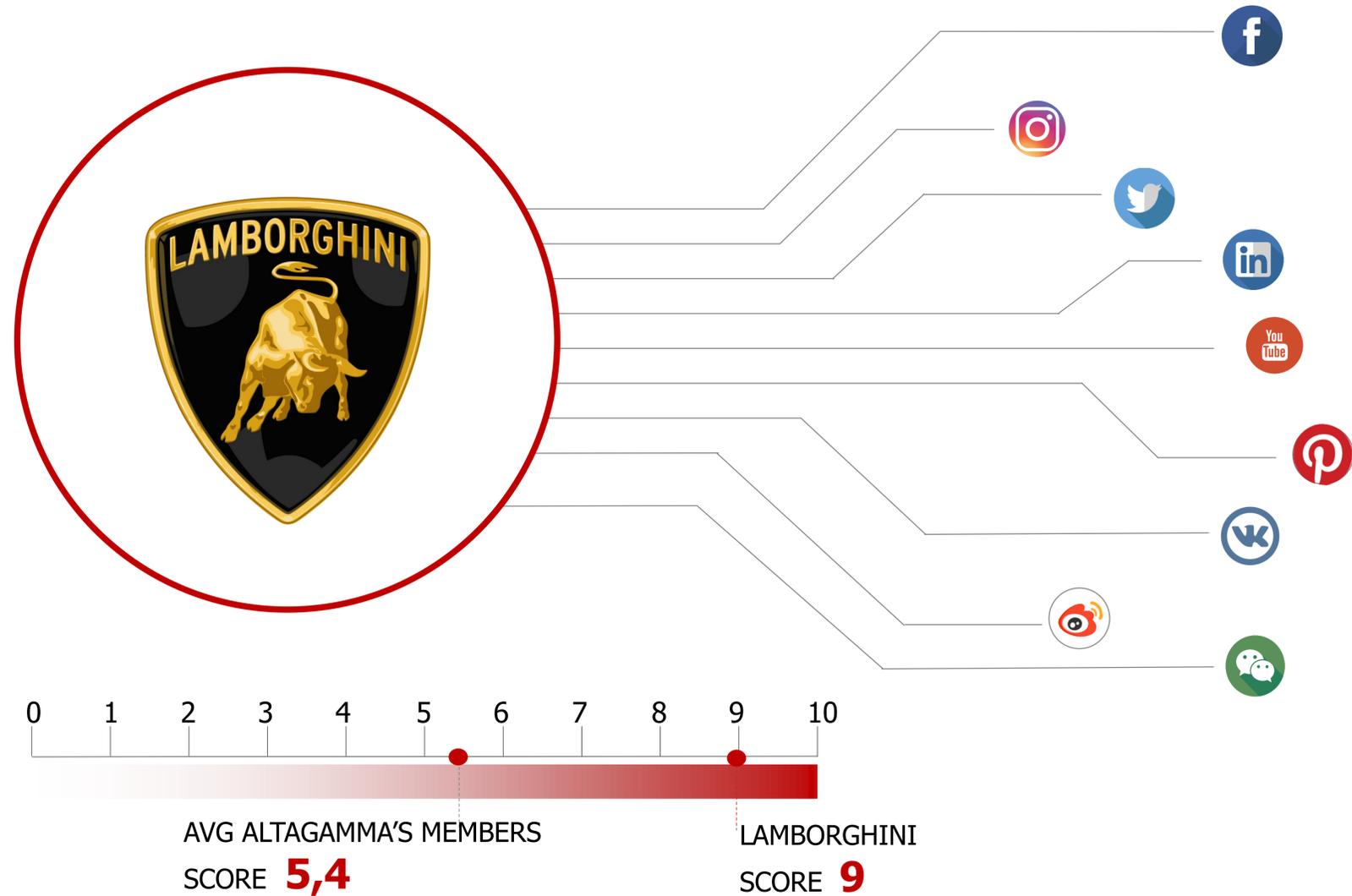
DIFFERENT PRIORITIES BY CATEGORY



 Pillar score ≥ 7
 $7 > \text{Pillar Score} > 3,5$
 Pillar Score $\leq 3,5$



SOCIAL PRESENCE BEST PERFORMER



9/10 channels covered.

All channels proved to be **Complete, Consistent and Active.**

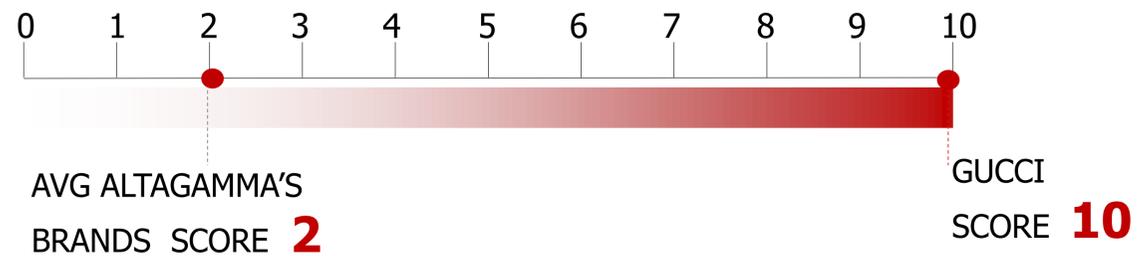


SHARE OF VOICE BEST PERFORMER



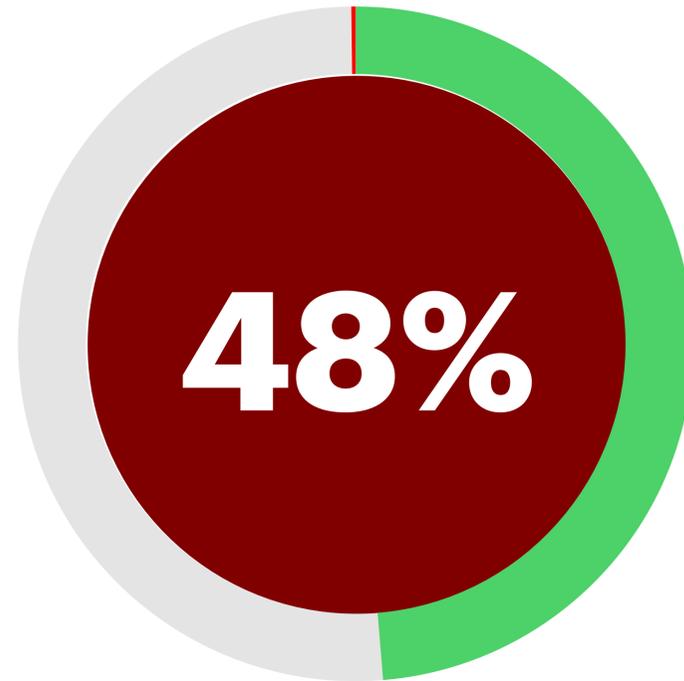
1,7

mln mentions in 2018





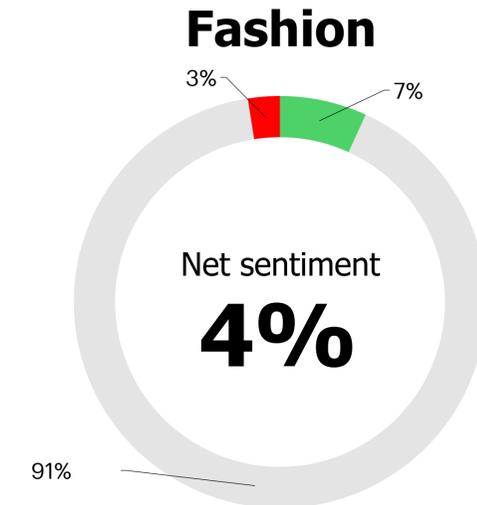
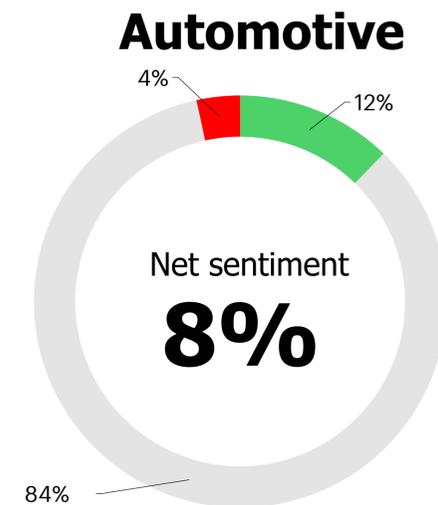
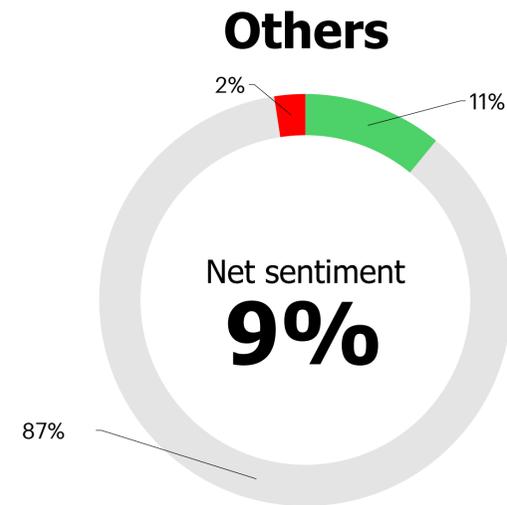
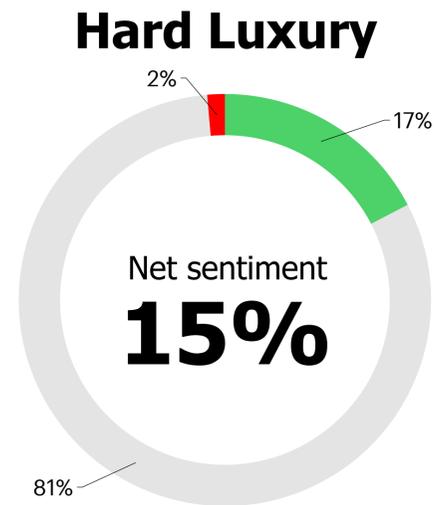
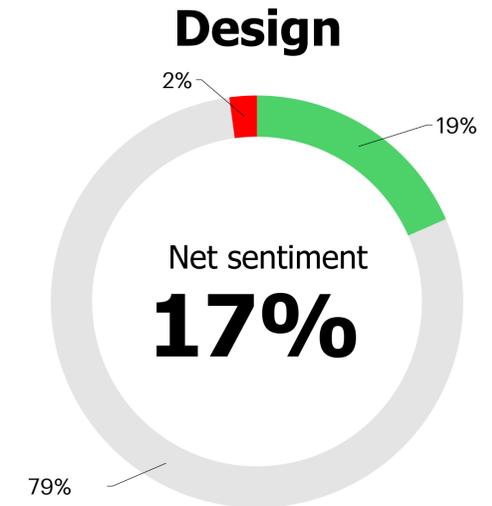
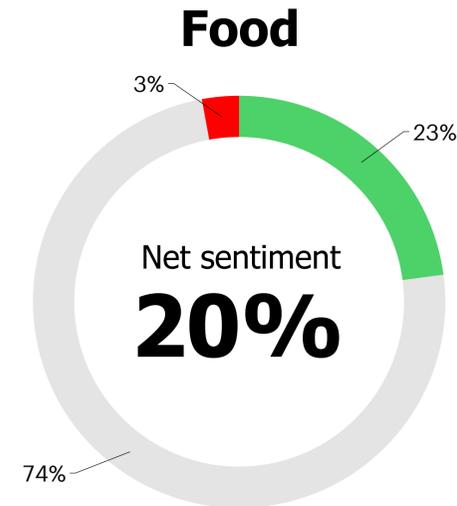
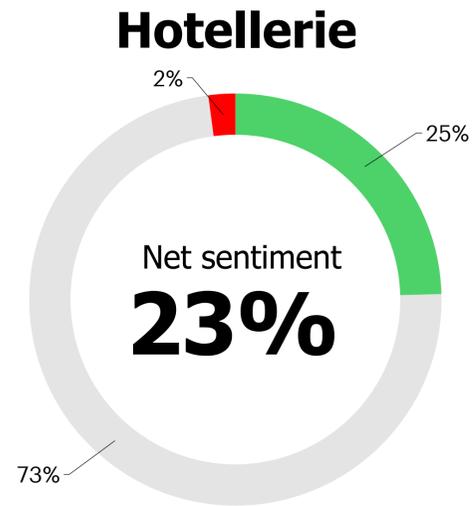
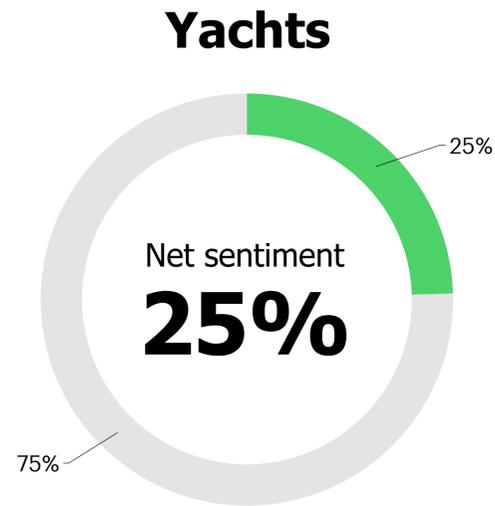
NET SENTIMENT BEST PERFORMER



17,4% avg
of Altagamma's brands

NET SENTIMENT GAP TO FILL FOR FASHION AND AUTOMOTIVE

Net Sentiment Score is calculated as the difference between positive and negative mentions as percentage points.



Note: The Net Sentiment is the difference between positive and negative sentiment

INSIGHTS 2018

3.

**EMERGING SOCIAL MARKETS
AND INFLUENCERS KEY TO DRIVE
FUTURE GROWTH**

OPPORTUNITY IN EMERGING SOCIAL

China and Russia account for

~30%

of global luxury market for
Altagamma categories¹

~1.65 bln

Monthly Active Users on regional
and emerging social media²

Only

~28%

Altagamma's members are
present on local social media



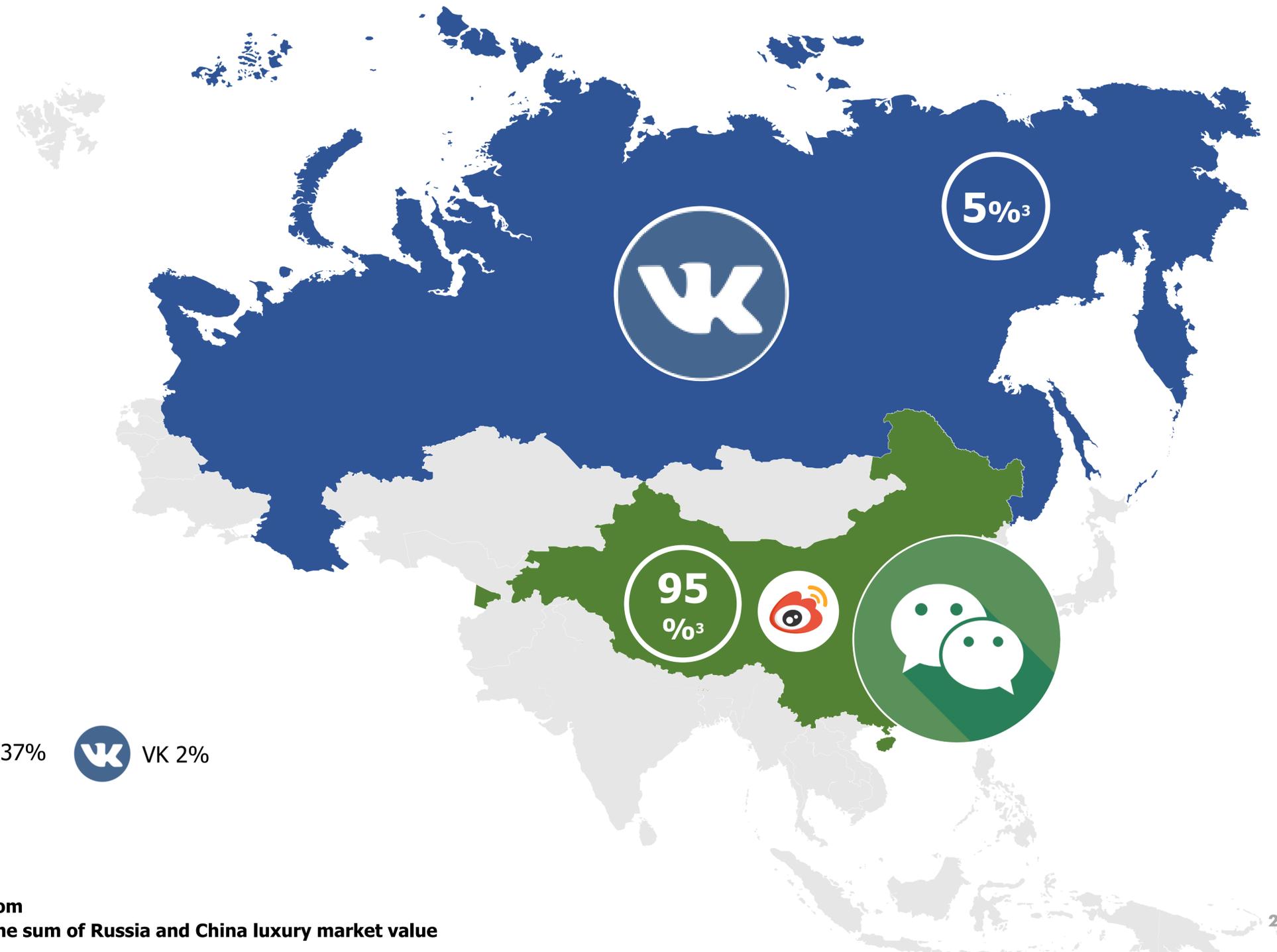
WeChat 45%



Sina Weibo 37%



VK 2%



¹ Euromonitor 2018

² Wearesocial.com and Statista.com

³ Percentage of each market on the sum of Russia and China luxury market value

SHARE OF VOICE BY REGION

	AMERICAS	EMEA	APAC
Fashion	38%	13%	49%
Automotive	50%	32%	18%
Others	45%	39%	16%
Hard Luxury	41%	22%	37%
Design	41%	48%	11%
Food	46%	44%	10%
Hotellerie	44%	49%	7%
Yacht	47%	49%	4%

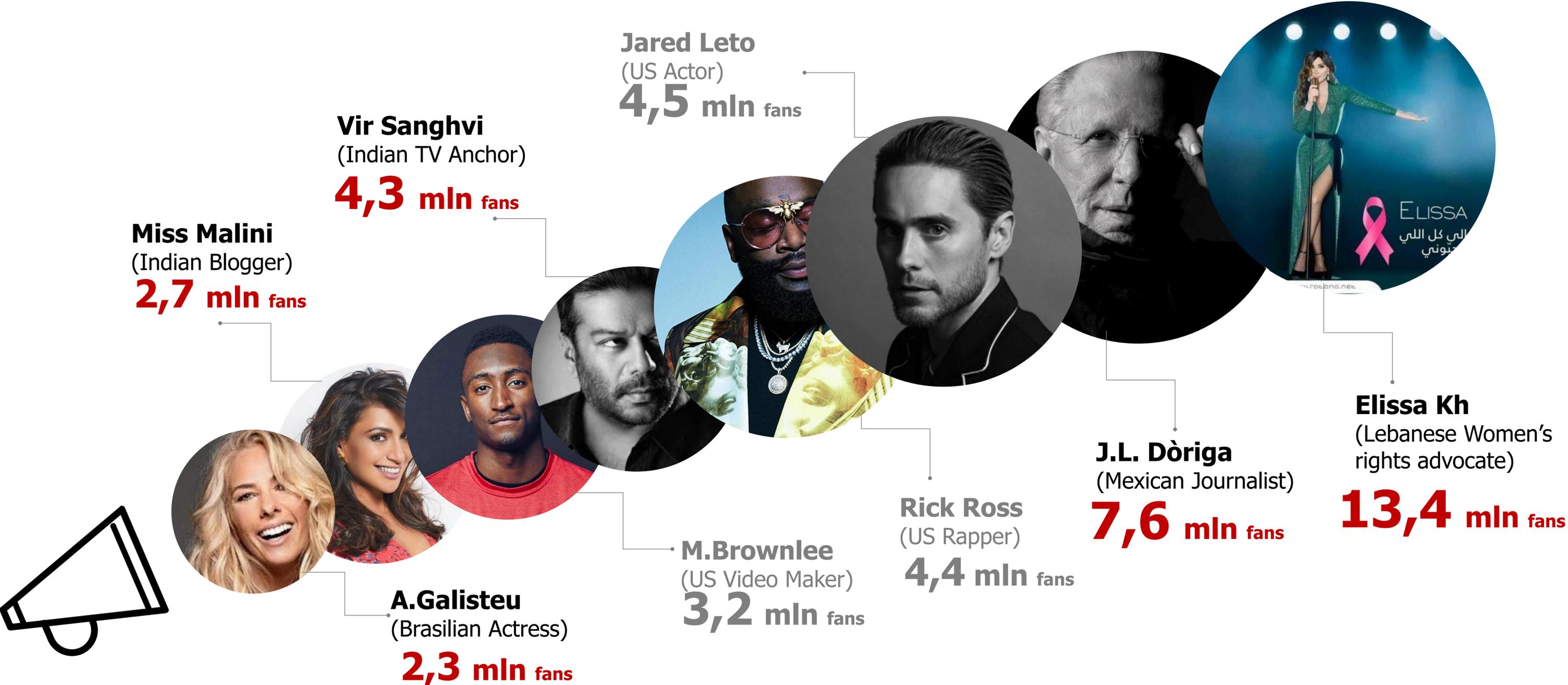
The most relevant regions for social media differ by category.

Fashion is the only category that registers the majority of spontaneous conversation in APAC.

Design, Food, Hotellerie and Yacht still have huge margins of growth in terms of awareness in APAC.

Note: 30% total mentions are not geolocalized.

MAJORITY OF TOP AUTHORS FROM EMERGING



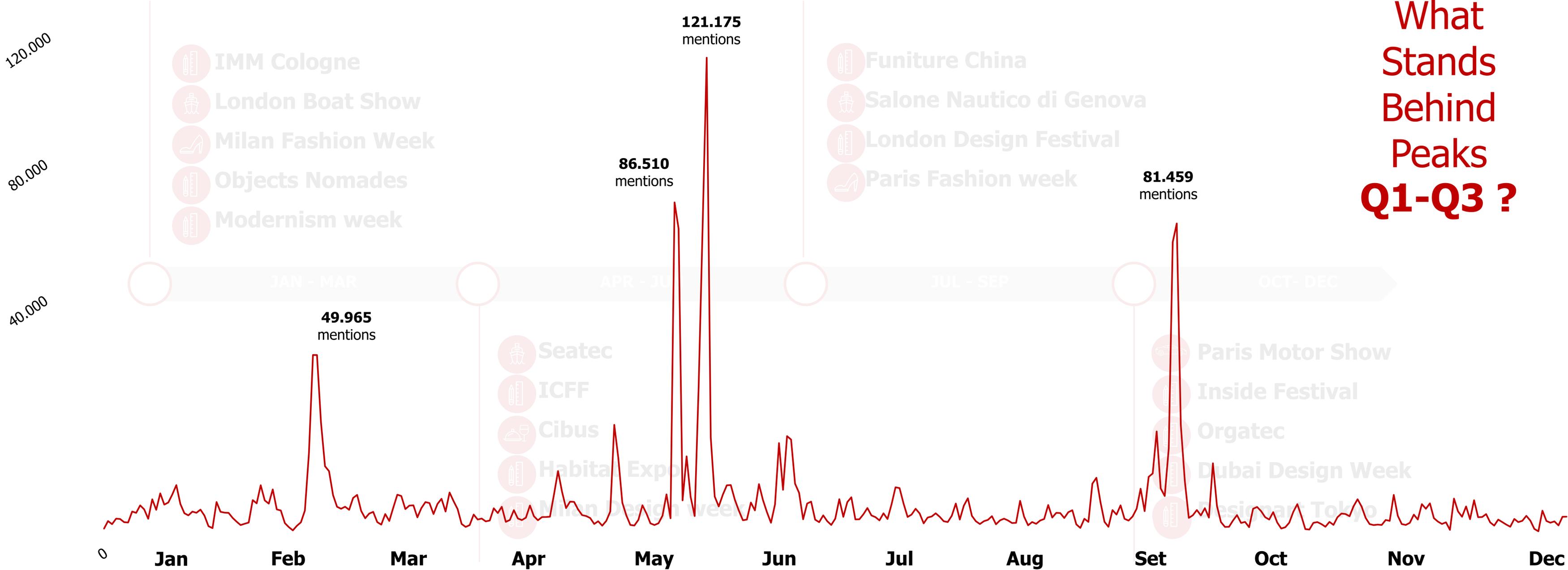
*People that posted about Altagamma members or were tagged in association to Altagamma members. In red those coming from emerging countries.

INSIGHTS 2018

4.

**ROOM FOR CROSS CATEGORY “SOCIAL SYNERGIES”
TO BE EXPLOITED AMONG ALTAGAMMA MEMBERS**

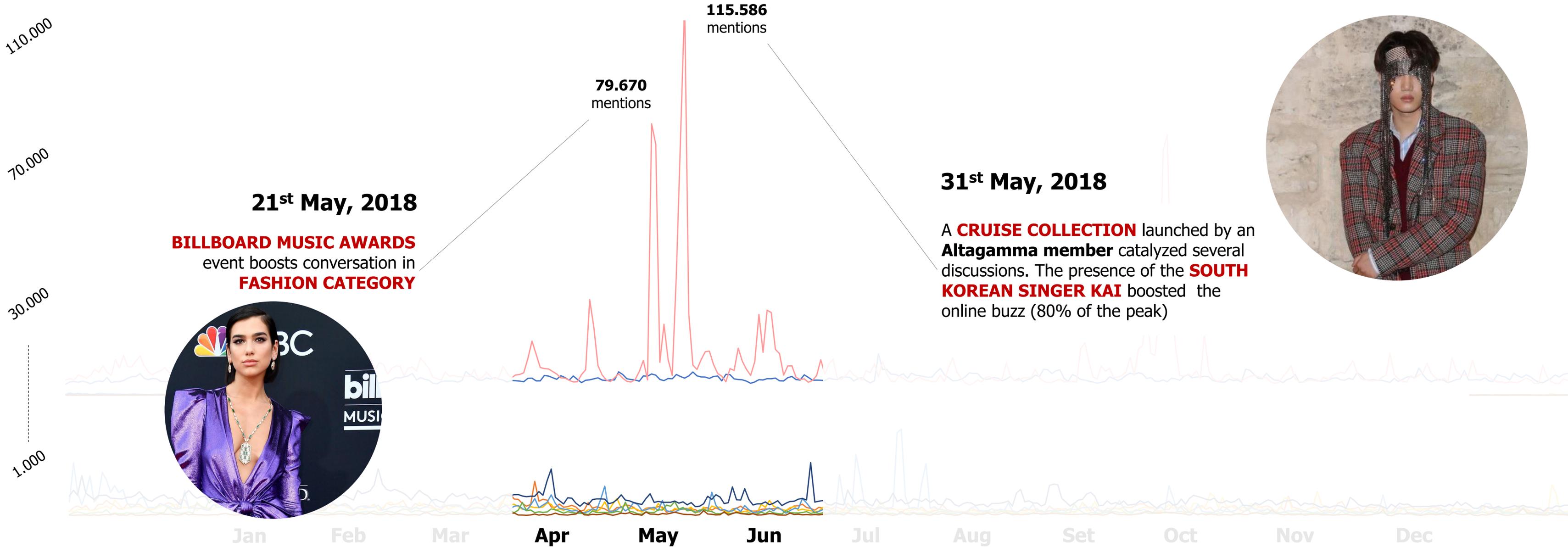
SHARE OF VOICE: 2018 TRENDLINE



What
Stands
Behind
Peaks
Q1-Q3 ?

Q2: SHOW EVENTS AS A SHARE OF VOICE BOOSTER

Q2: 1.6 mln



— Cars & Motorbikes — Design Furniture — Fashion — Food — Hard Luxury — Hotellerie — Others — Yacht

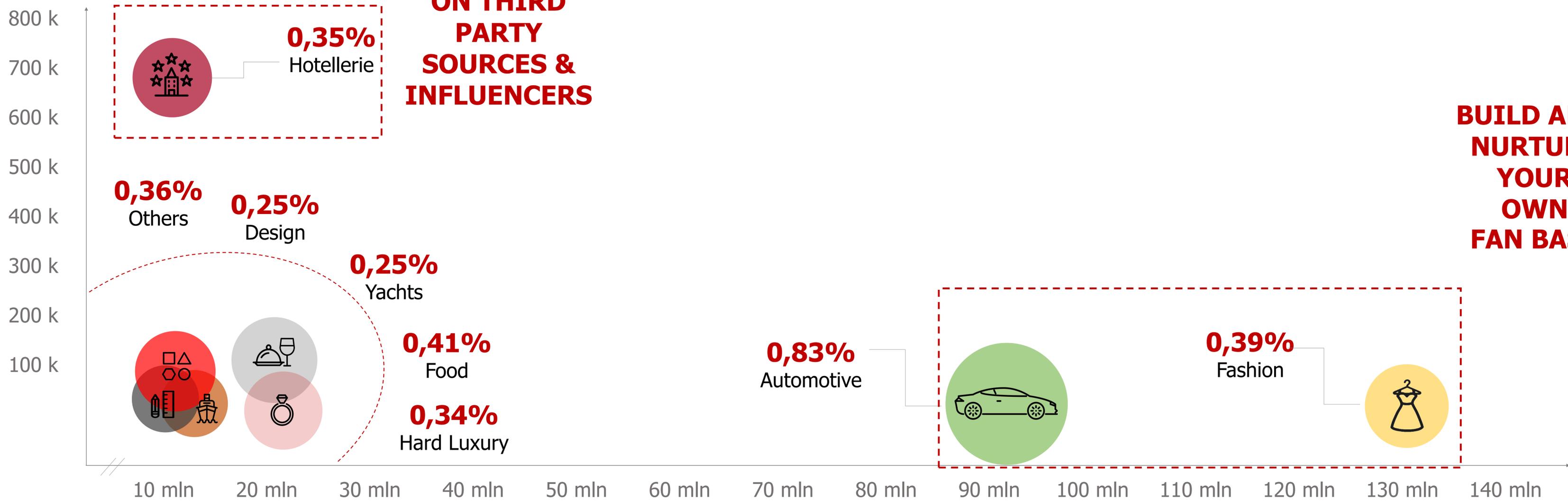
INSIGHTS 2018

5.

**2 KEY STRATEGIES FOR SOCIAL SUCCESS
SEEM TO EXIST FOR THE DIFFERENT
ALTAGAMMA CATEGORIES**

REACHING VS ENGAGING THE CROWD?

Earned Reach (fans)



LEVERAGE ON THIRD PARTY SOURCES & INFLUENCERS

BUILD AND NURTURE YOUR OWN FAN BASE

The graph shows categories positioning according to their **Earned** and **Owned Reach**. The bigger the spheres, the higher the **Average Engagement Rate (ER) by category (%)**.

Owned Reach (fans)

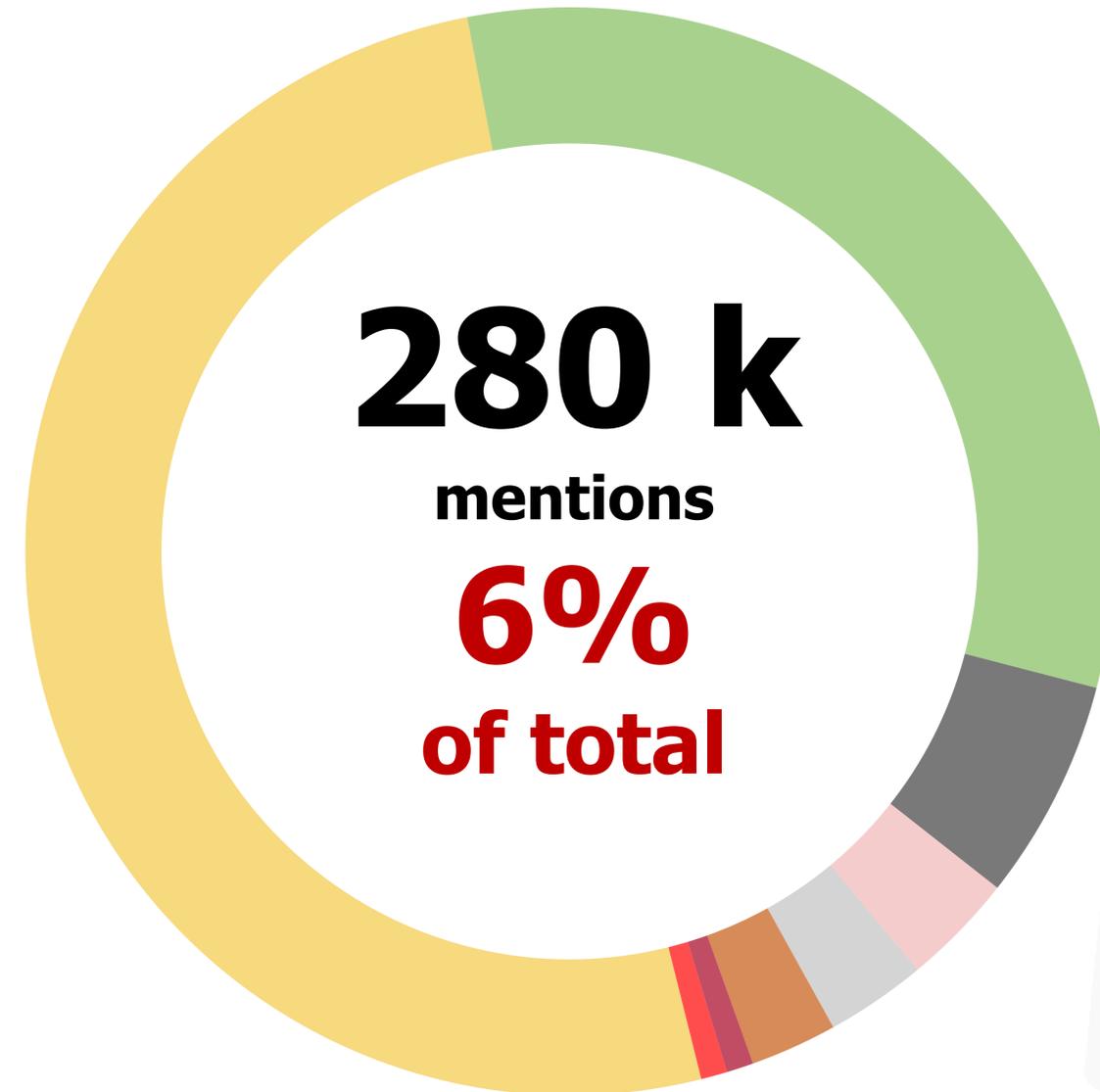
INSIGHTS 2018

6.

“MADE IN ITALY” ASSOCIATION SEEM TO BE STILL UNEXPLOITED FOR SOME ALTAGAMMA CATEGORIES

SHARE OF VOICE OF MADE IN ITALY

-  Fashion **51%**
-  Automotive **32%**
-  Design **6%**
-  Hard Luxury **3%**
-  Food **3%**
-  Yachts **3%**
-  Hotellerie **1%**
-  Others **1%**

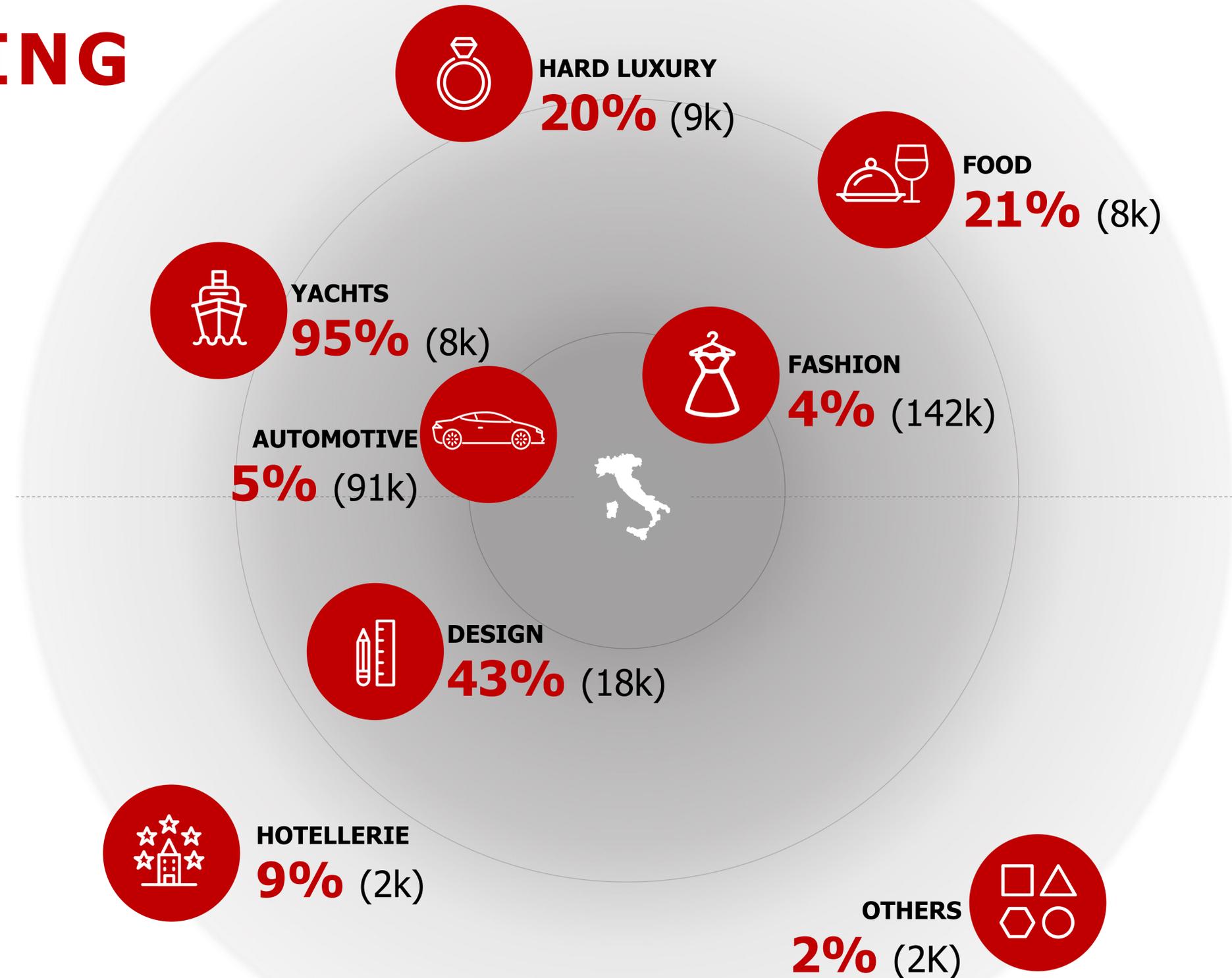


FASHION and **AUTOMOTIVE** are towing conversations about made in Italy, spreading it most than others towards foreign countries.

CATEGORIES POSITIONING

In absolute value **Fashion (142k)**, **Automotive (91k)** and **Design (18k)** are the most frequently associated industries to **Italian values and qualities**.

But.. If compared to each category's mentions, **Yacht (95%)** and **Design Furniture (43%) SEEM TO BETTER EXPLOIT THE ASSOCIATION WITH MADE IN ITALY.**



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RECAP ON **KEY TAKEAWAYS**

1.

~90% of conversations related to Fashion and Automotive. Other categories should try to catch up on social media buzz

4.

Room for cross category “social synergies” to be exploited among Altagamma members

2.

Different “social” priorities and areas of improvement for different Altagamma categories

5.

2 key strategies for social success seem to exist for the different Altagamma categories

3.

Emerging social markets and influencers are key to drive future growth

6.

“Made in Italy” association seem to be still unexploited for some Altagamma categories



TOP TRENDING TOPICS OF 2019



ALTAVANNA
CREATIVITÀ E CULTURA ITALIANA

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2019 TOP 10 KEYWORDS BY CATEGORY

Fashion	Automotive	Hard Luxury	Design	Food	Hotellerie	Yacht
1.Wang (633K) 2.Got7 (341K) 3.Kai (292K)	1.Video (139K) 2.Look (105K) 3.Heritage (96K)	1.Necklace (7,6K) 2.Snake (6,2K) 3.Suho (3,3K)	1.Light (3,7K) 2.Architecture (1,6K) 3.Luxury (1,5K)	1.Coffee (15K) 2.Wine (4K) 3.italian taste (2,7K)	1.Boycottbrunei (4K) 2.Relax (1,8K) 3.Event (1,2K)	1.Design (724) 2.Length (518) 3.Award (279)
4.Party (132K) 5.Bag (81K) 6.co-owned (70K) 7.Video (66K) 8.Wayv (60K) 9.Music (59K) 10.Cruise (45K)	4.Engine (91K) 5.Game (84K) 6.Speed (57K) 7.Environment (37K) 8.Rebuilding (32K) 9.Sound (24K) 10.Event (16K)	4.Exo (3,2K) 5.Bulgari (1,9K) 6.Jewelry (1,6K) 7.Kriswu (1,5K) 8.Wuyifan (1K) 9.#whatwuyifanswear (1K) 10.Gddragon (0,8K)	4.interior design (1,5K) 5.Décor (1,5K) 6.Photography (0,9K) 7.salone del mobile (0,85K) 8.furniture design (0,4K) 9.AR (0,37K) 10.Desginlover (0,25k)	4.World50best (1,4K) 5.premium quality (1K) 6.Chef (0,8K) 7.Latam50bests (0,7K) 8.Food waste (0,4K) 9.#moretoeverystory (0,4K) 10.Mirazur (0,35k)	4.Ivanka (1K) 5.Travel (0,9K) 6.Family (0,8K) 7.Room (0,7K) 8.Savoini (0,6K) 9.View (0,5K) 10.Brexit (0,3K)	4.Deck (274) 5.Exterior (213) 6.Tradition (195) 7.Sustainable (162) 8.Sold (151) 9.Comfort (108) 10.Marocain (42)

DESIGN IN 2019: USE OF LIGHT, AUGMENTED REALITY AND SUSTAINABLE DESIGN



Design of light

Within online discussion, light emerges as an active components of the items: it became the enabler of a new way of fruition also if it is not fully integrated within the object.



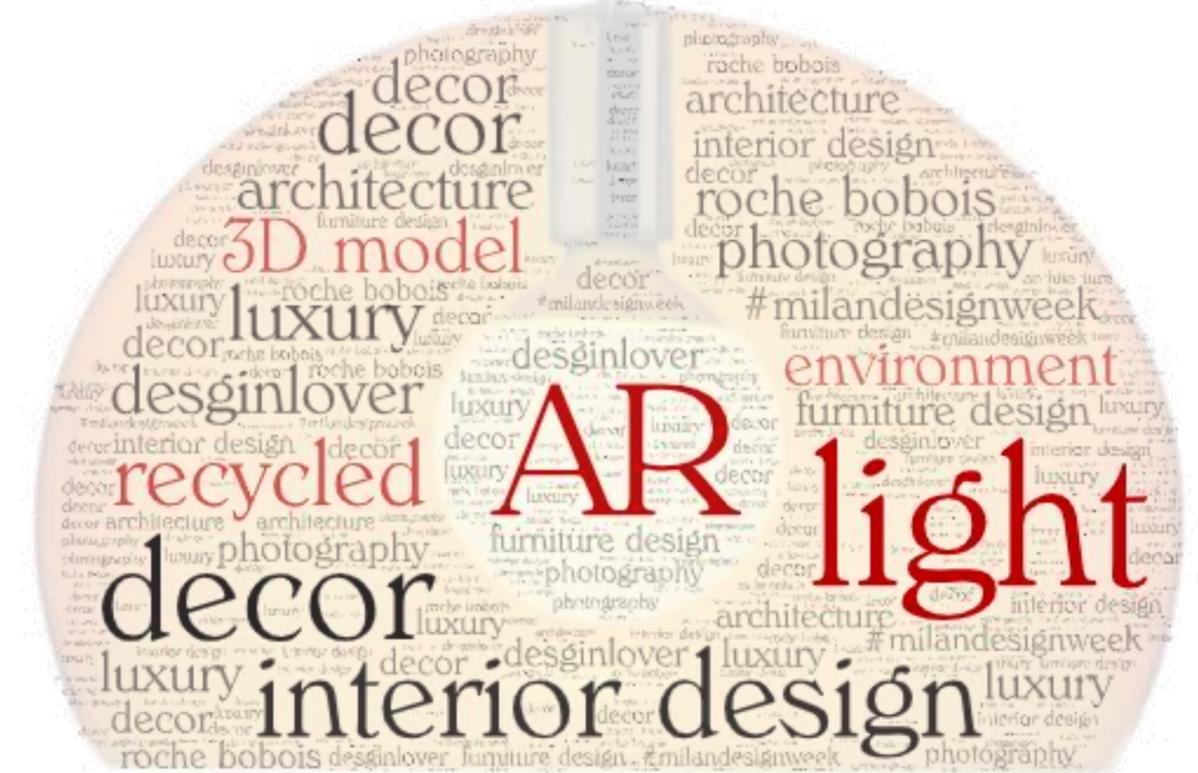
Augmented design

With the aim to ease the access to premium products to all customers, brands are moving towards a tech approach based on AR and 3D modelling which resulted notably appreciated by online audience.



Zero impact

Solar panels, recycled material and environmental impact: also design industry is moving towards a sustainable business especially regarding architecture world and material used to create new products' lines.



FOOD IN 2019:

AWARDS, TECH, AMBASSADOR AND SUSTAINABLE COOKING



Gourmet awards

Food industry gained high visibility due to awards and competition like the World 50 best, allowing people to access to professional-cooking world.



Influ-chef

Food no longer needs to engage people from other worlds to promote itself: more and more chefs are the most relevant, recognizable and trustable faces for the users.



Circular food

Gastronomic world is moving to a zero-waste approach: this trend proves itself in 2019 too with a greater attention in reducing waste and environmental impact.



Tech-food

New experiences enabled by tech-suppliers: this is the way that some brands are adopting to provide new experiences to clients and improve production efficiency.



NAVIGATION IN 2019: INTERIOR DESIGN, EQUIPMENT AND ENVIRONMENT



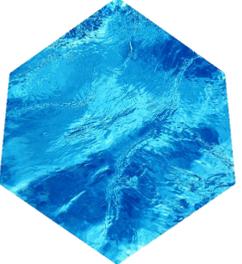
Inside the boats

What's inside the yachts? This is one of the most frequently discussed topic regarding the navigation industry: furniture, materials and premium features.



Meters matter

Several comments and discussions were published with regards to the length of luxury boats, as always a relevant aspect capable of triggering online appreciation



Sustainable navigation

Brands' proposition focusing on hybrid propulsion for luxury boats is raising as a viral topic during 2019





THANK YOU