

Digital Competitive Map 2018 analytical frame



AXES	CATEGORIES	CRITERIA
<p>DIGITAL STRATEGIC REACH 74 Parameters Worldwide Focus</p> <p><i>Supply Side</i></p>	<p>1. Ecommerce Strategy</p> <p>2. Customer Engagement Strategy</p> <p>3. "Made in" on Web</p>	<p>1. Countries with Ecommerce</p> <p>2. Online Product Categories Extension</p> <p>3. Web Languages</p> <p>4. Email Reach</p> <p>5. Social Reach</p> <p>6. "Made in" on Web</p>
<p>DIGITAL CUSTOMER EXPERIENCE 104 Parameters US Focus</p> <p><i>Demand Side</i></p>	<p>4. Website Experience</p> <p>5. Ecommerce Experience</p> <p>6. Cross-Channel Experience</p> <p>7. Customer Engagement Experience</p>	<p>7. Display Visualization</p> <p>8. Product Presentation</p> <p>9. Product Selection Support</p> <p>10. Customer Service</p> <p>11. Style Advisory</p> <p>12. Online Shopping Appeal and Friendliness</p> <p>13. Online Payment Methods</p> <p>14. Delivery Options</p> <p>15. Store Finder</p> <p>16. Cross-Channel Services</p> <p>17. Email Proficiency</p> <p>18. Product Page Share on Socials</p> <p>19. Apps</p>

Panel of 34 Luxury Brands

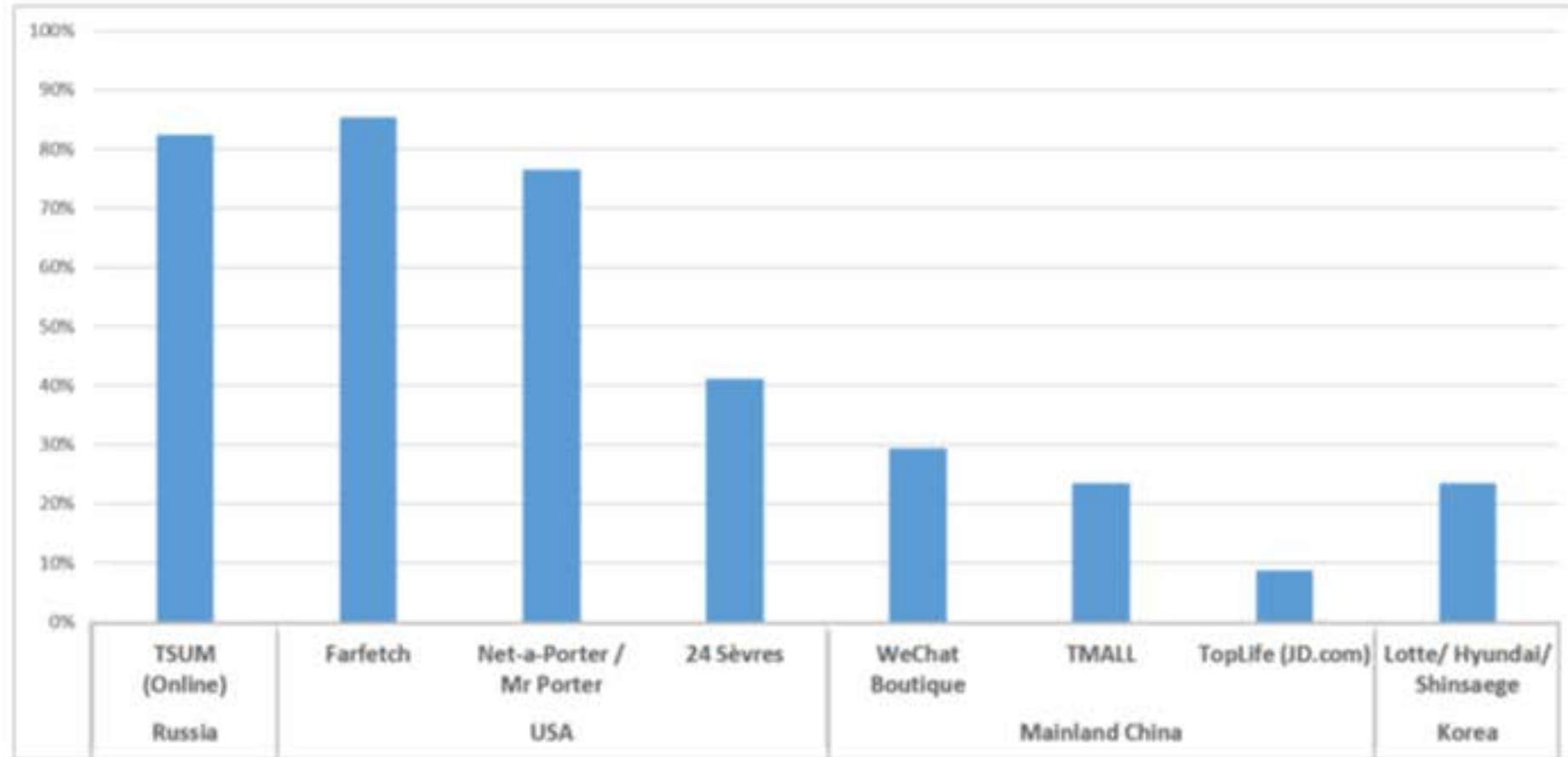


LUXURY PANEL 2018	
Bulgari	Jeweler
Cartier	Jeweler
Tiffany	Jeweler
Bottega Veneta	High-End
Brunello Cucinelli	High-End
Céline	High-End
Chanel	High-End
Dior	High-End
Fendi	High-End
Loro Piana	High-End
Saint Laurent	High-End
Valentino	High-End
Balenciaga	Runner-Up
Chloé	Runner-Up
Dolce&Gabbana	Runner-Up
Ferragamo	Runner-Up
Givenchy	Runner-Up
Miu Miu	Runner-Up
Moncler	Runner-Up
Tod's	Runner-Up
Burberry	Mega-Brand
Gucci	Mega-Brand
Hermès	Mega-Brand
Louis Vuitton	Mega-Brand
Prada	Mega-Brand
Ray-Ban	Mega-Brand
Zegna	Mega-Brand
Armani	Premium
Coach	Premium
Hugo Boss	Premium
Michael Kors	Premium
Ralph Lauren	Premium
Swatch	Premium
Tory Burch	Premium

Luxury Brands presence on major Etailers



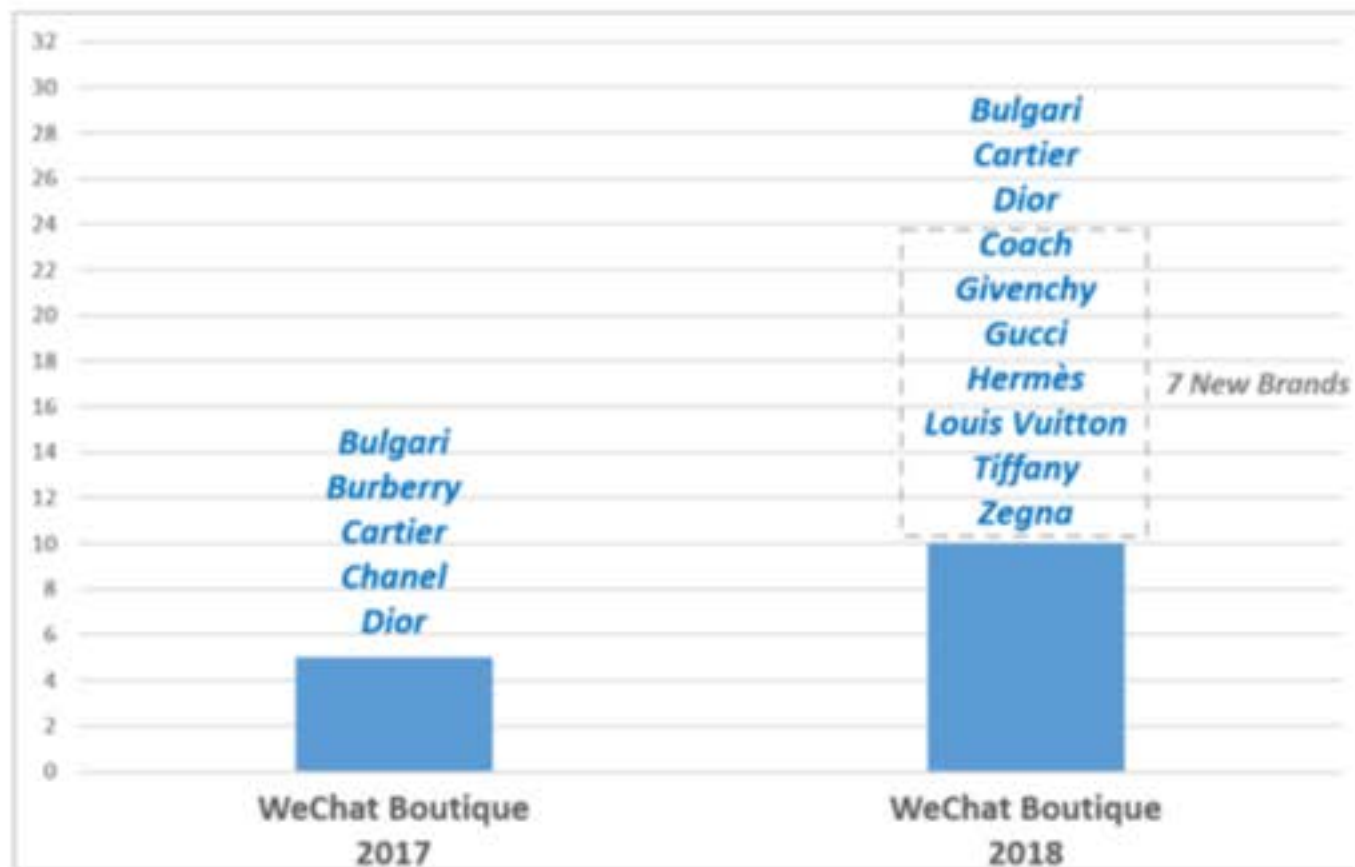
Total Panel Ecommerce presence on major Etailers and Korean/Russian major Dept. Stores
(%, Panel 34 brands, DCM 2018)



Presence on WeChat boutiques doubled in 2018 vs 2017



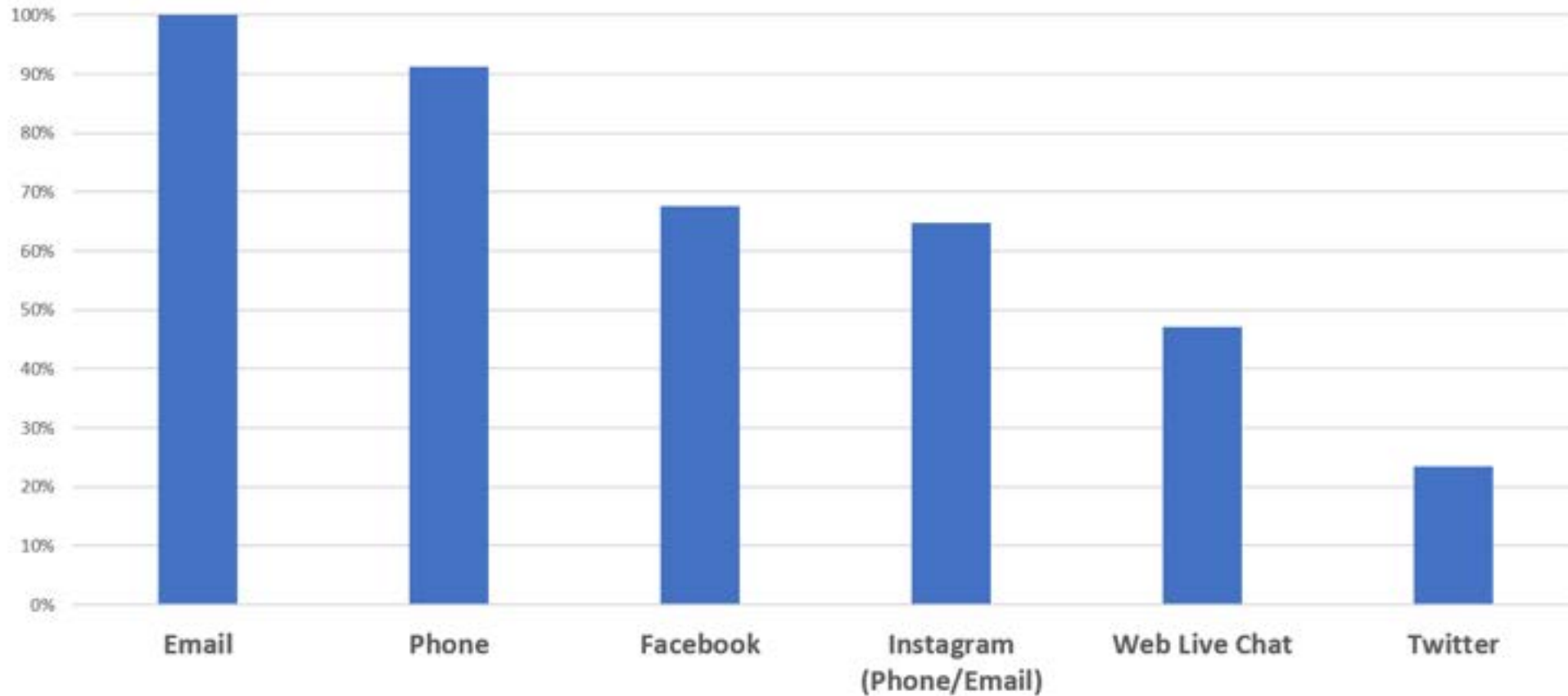
Brands selling on WeChat (China, number of brands, Panel 32 brands, DCM 2018 vs DCM 2017)



Customer Service Touch Points: 2/3 of Brands offering Contacts via Facebook and Instagram, ca. 50% via Web Live Chat



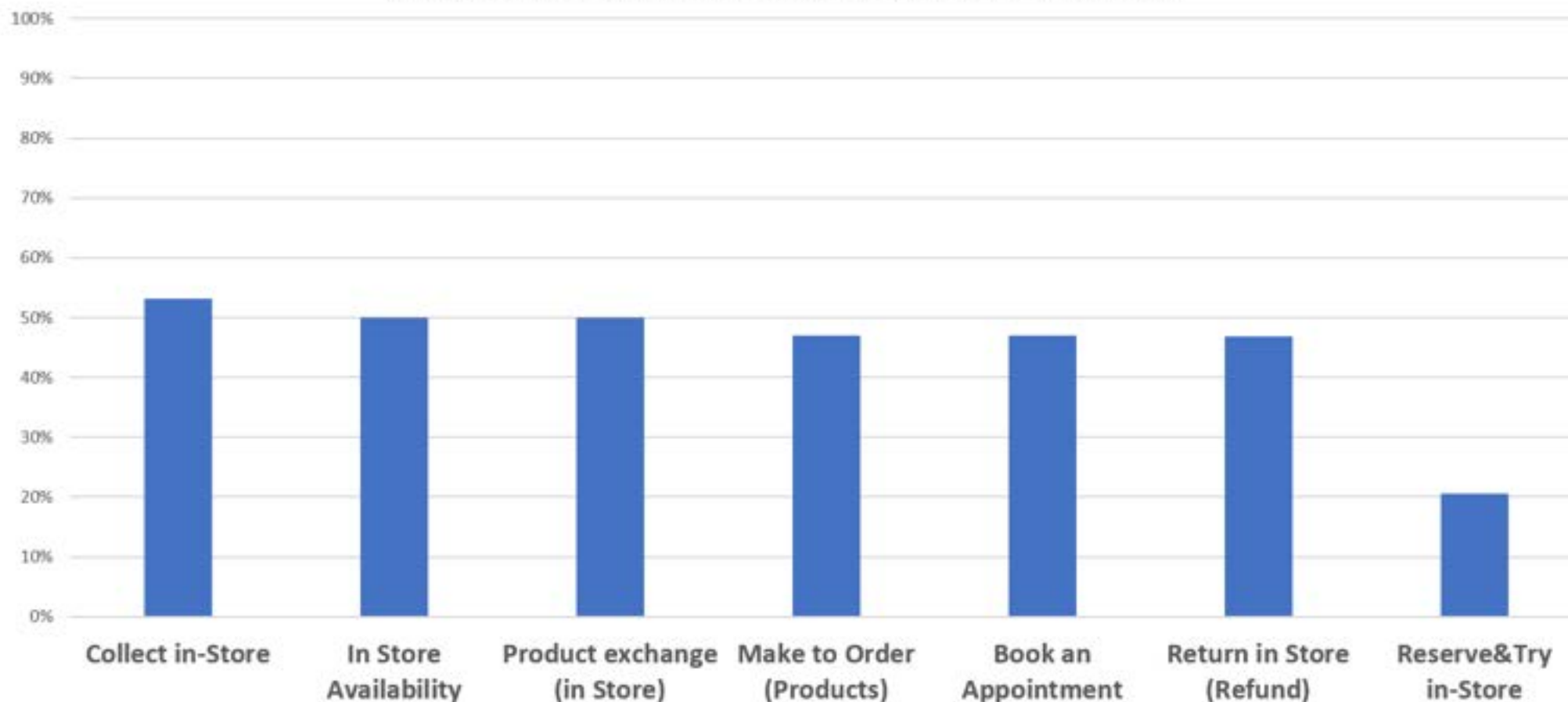
Brands offering Customer Care Contact options (% , Panel 34 brands, DCM 2018, US)



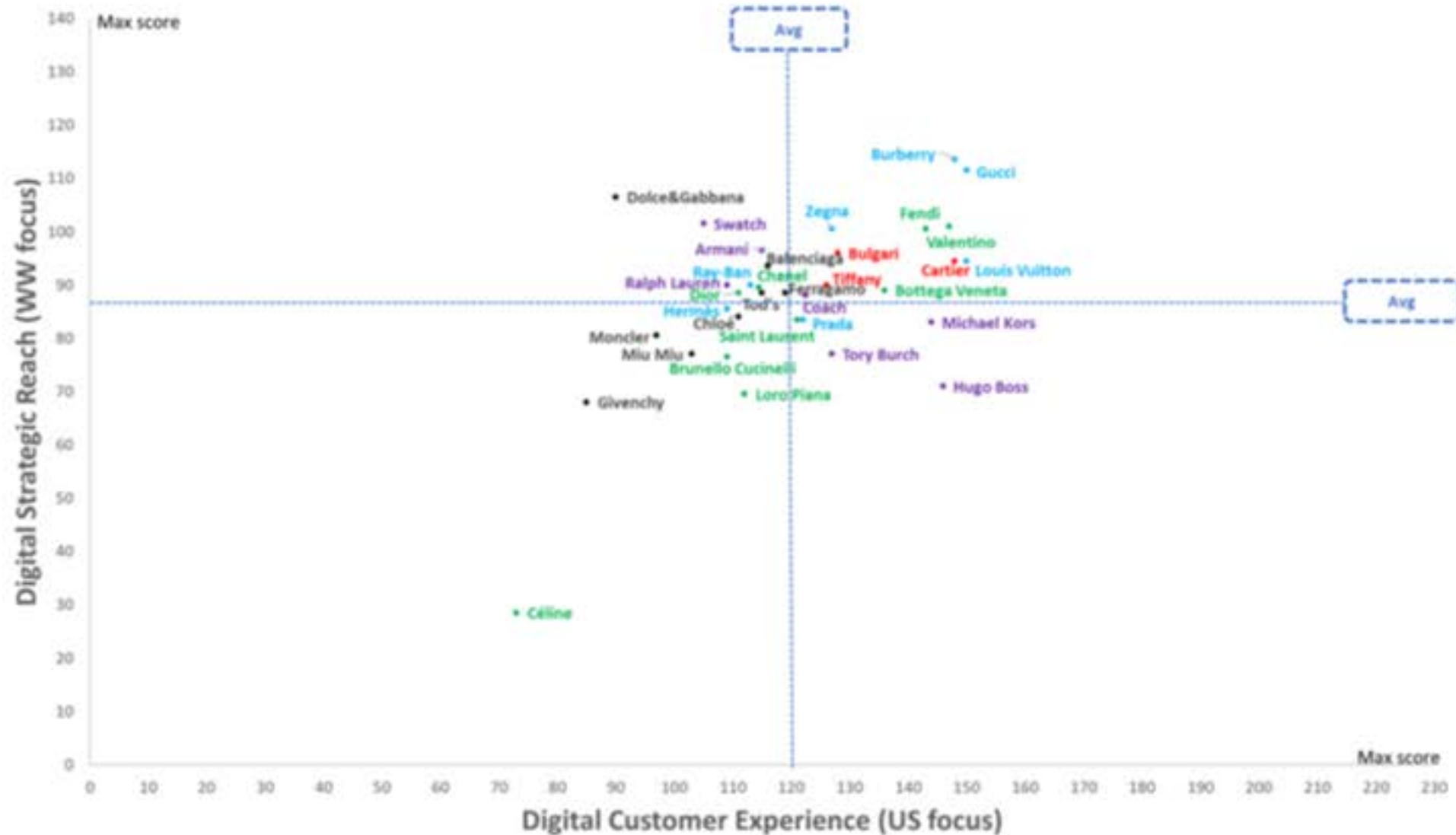
Cross-Channel Services from Web to Physical Stores: exploited by ca. 50% of brands, Reserve&Try In-Store less



Total Panel Cross-Channel Coverage (% , Panel 34 brands, DCM 2018)



Digital Competitive Map Luxury 2018



Best in Class 2018: Burberry, Gucci, Louis Vuitton

Best Improvers 2016-2018: Dolce&Gabbana, Valentino

