

Digital Competitive Map Luxury 2018

Abstract

Milan, 16th July 2018

Contactlab Digital Audit & Benchmarking Frame: 3 pillars



Online Offer Dive & Pricing Landscape



Digital Competitive Map



Online Purchasing Experience



16th July 2018 Event Focus

Panel of 34 Luxury Brands



PANEL

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



DCM Luxury 2018 analytical frame revised/upgraded: overall 19 Criteria and 178 Parameters



AXES	CATEGORIES	CRITERIA
<p>DIGITAL STRATEGIC REACH 74 Parameters Worldwide Focus</p> <p><i>Supply Side</i></p>	1. Ecommerce Strategy	<ol style="list-style-type: none"> Countries with Ecommerce Online Product Categories Extension
	2. Customer Engagement Strategy	<ol style="list-style-type: none"> Web Languages Email Reach Social Reach
	3. "Made in" on Web	<ol style="list-style-type: none"> "Made in" on Web
<p>DIGITAL CUSTOMER EXPERIENCE 104 Parameters US Focus</p> <p><i>Demand Side</i></p>	4. Website Experience	<ol style="list-style-type: none"> Display Visualization Product Presentation Product Selection Support Customer Service Style Advisory
	5. Ecommerce Experience	<ol style="list-style-type: none"> Online Shopping Appeal and Friendliness Online Payment Methods Delivery Options
	6. Cross-Channel Experience	<ol style="list-style-type: none"> Store Finder Cross-Channel Services
	7. Customer Engagement Experience	<ol style="list-style-type: none"> Email Proficiency Product Page Share on Socials Apps

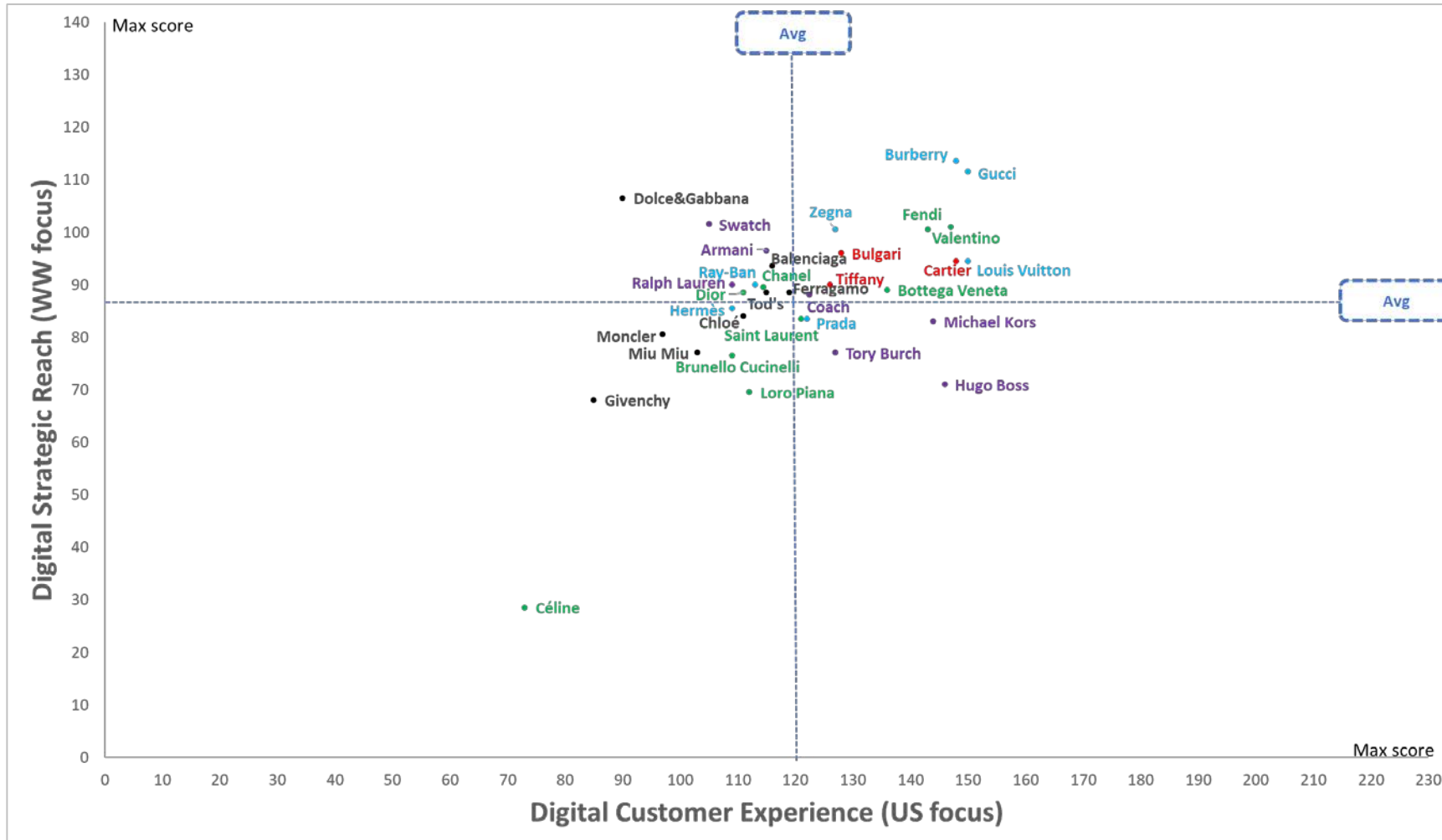
Overall Luxury Panel performance



AREA OF ANALYSIS	2018 PANEL SCORE over Max Potential (%)
Display Visualization	100%
Email Reach	76%
Web Languages	72%
Social Reach	67%
Online Shopping Appeal and Friendliness	66%
Customer Service	64%
Countries with Ecommerce	61%
Product Selection Support	60%
Product Presentation	58%
Email Proficiency	57%
Store Finder	55%
"Made In" on Web	51%
Delivery Options	46%
Cross-Chanel Services	45%
Online Payment Methods	45%
Online Product Categories Extension	39%
Apps	37%
Style Advisory	37%
Product Page Share on Socials	31%
Total Panel	56%



Digital Competitive Map Luxury 2018



Note: Céline and Givenchy positions affected by being not yet active with ecommerce in the US

Digital Competitive Map Luxury 2018: Key Research Conclusions



- Overall Good Panel performance on **globalization/localization driven criteria**, while still significant room for improvement for key criteria such as **Cross-Channel Services** and **Style Advisory**
- In DCM 2018 **Gucci** joining **Burberry** in the overall digital leadership
- Significant increase of **Direct Ecommerce** in **China** (Gucci / Louis Vuitton / Prada...), **Korea** and **Gulf countries**. Presence on Asian **Etailers** still limited
- **Balenciaga**, **Burberry** and **Chloè** with the largest **Ecommerce coverage**, direct and via Etailer
- **Dolce&Gabbana** the most active brand on **Socials**, in particular on **Instagram** and **VK**. **Instagram Shopping feature** already introduced by 13 brands, **Facebook Shopping feature** by only 3 brands
- **Prada** and **Zegna** leading in **Cross-Channel Services** from Website to Physical Stores
- **Bottega Veneta** with the best **Style Advisory** quality via Live Chat/Phone/Emails

- Still some surprising findings!
 - 3 brands not offering Customer Service via Phone
 - 3 brands not giving information about Store Opening Days/Hours
 - 8 brands still without Mobile Responsive Email Layout



Fashion & Luxury Deep Dive Membership

The fashion & Luxury Deep Dive Membership gives access to valuable benchmarks on digital performances, online processes and pricing strategies of 30+ luxury brands.

1

Benchmark

digital performance relative to competitors

2

Discover

customer engagement strategies in key Luxury markets

3

Identify

digital opportunities to improve your business

4

Apply

customer engagement best practices

3 ONLINE OFFER DIVE

Sharp acceleration in ecommerce offer: +30%
All brands now cover RTW

PART/18 vs. PART/17 (on US), 18 Brands Family		Web Catalogue		Shoppable Offer		
Model	23399	+30%	vs. PART/17	22380	+31%	vs. PART/17
ModelColor	41435	+28%	vs. PART/17	37821	+24%	vs. PART/17

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