

Digital Competitive Map Contemporary Fashion 2018

Key Insights

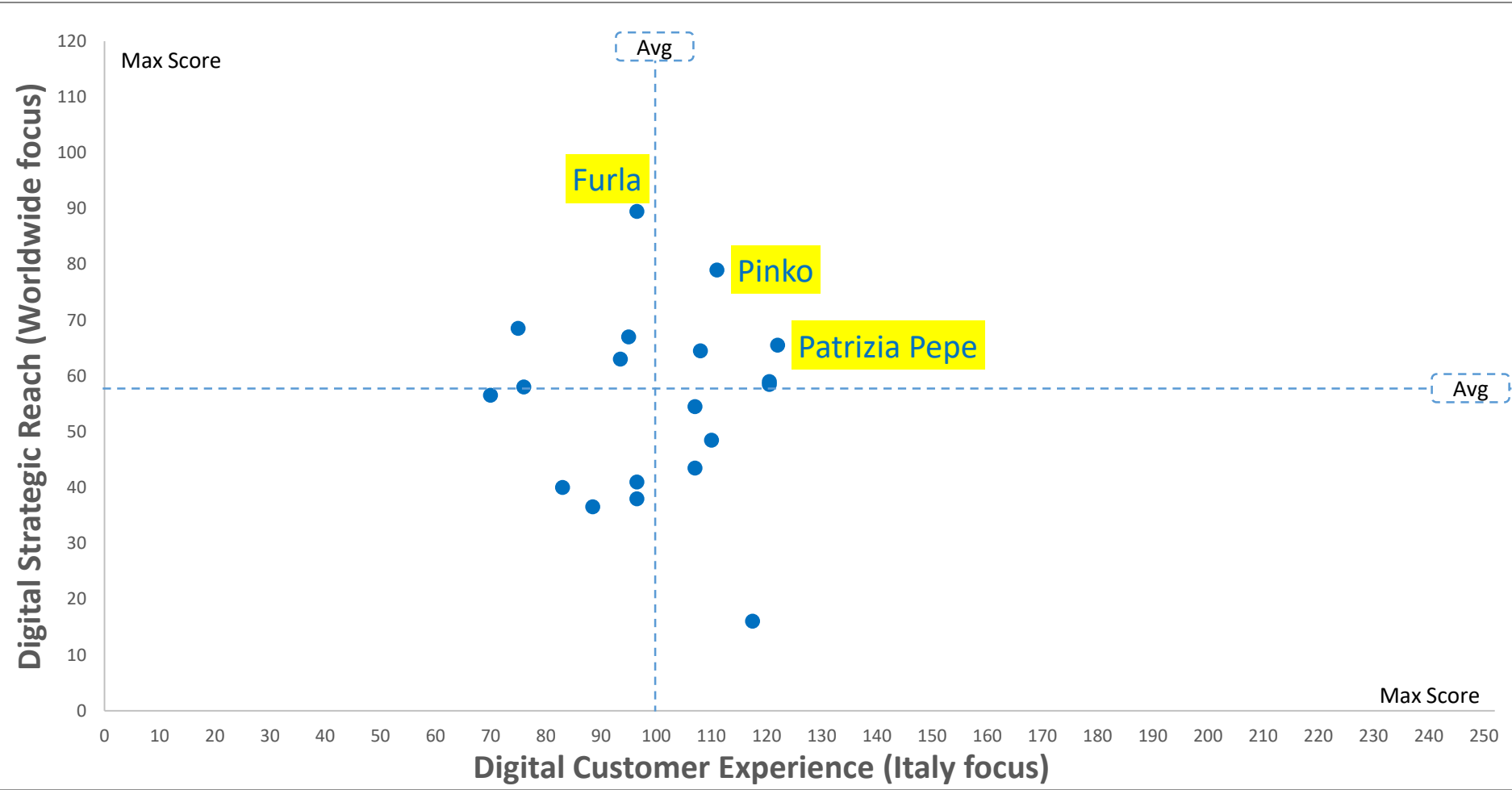
Contemporary Fashion Panel: 19 Italian Brands

CONTEMPORARY FASHION PANEL
Coccinelle
Elisabetta Franchi
Falconeri
Furla
Geox
Liu Jo
Love Moschino
Luisa Spagnoli
Max&Co
Motivi
MSGM
Off-White
Patrizia Pepe
Peuterey
Pinko
Rinascimento
Trussardi
Twinset
Woolrich

Contactlab Digital Competitive Map Methodology: 2 axes, 7 categories, overall 189 Parameters

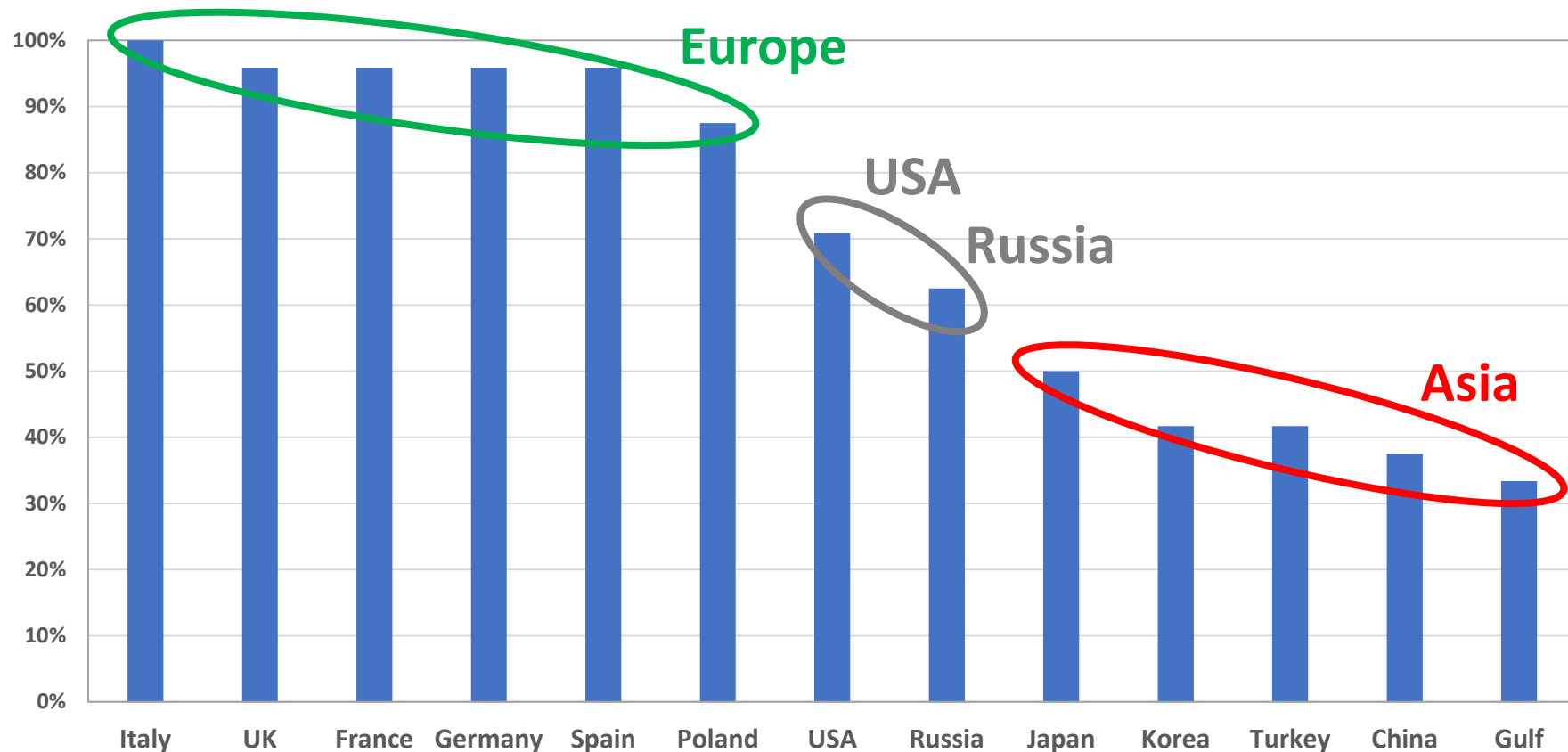
AXES	CATEGORIES
<p style="text-align: center;">DIGITAL STRATEGIC REACH 70 Parameters Worldwide focus</p>	<p>1. E-commerce Strategy</p>
	<p>2. Customer Engagement Strategy</p>
	<p>3. “Made in” Transparency</p>
<p style="text-align: center;">DIGITAL CUSTOMER EXPERIENCE 119 Parameters Italy focus</p>	<p>4. Website Experience</p>
	<p>5. E-commerce Experience</p>
	<p>6. Cross-Channel Experience</p>
	<p>7. Customer Engagement Experience</p>

Digital Competitive Map - Contemporary Fashion 2018: Top 3 Brands



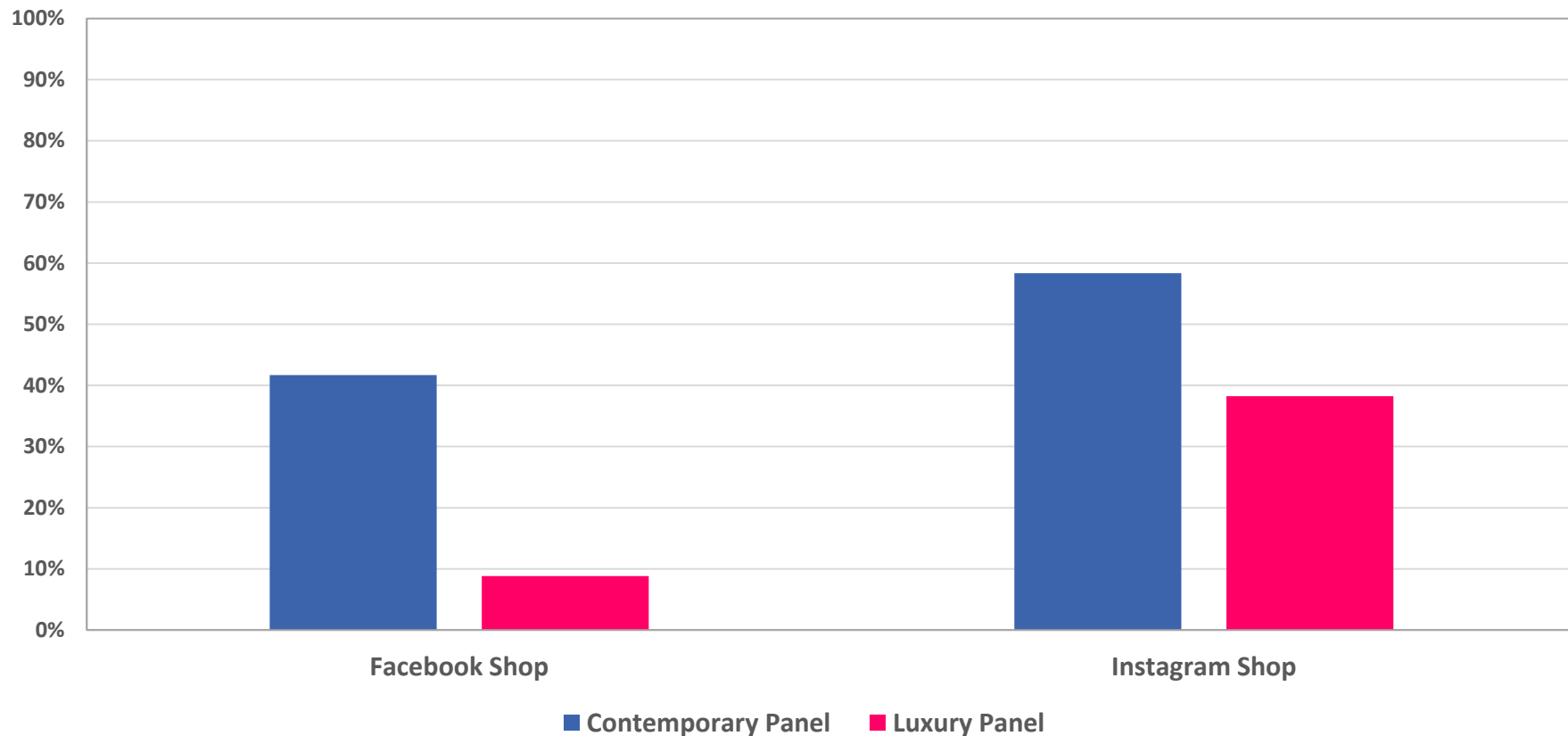
Contemporary Panel with strong E-commerce presence in Europe, good coverage in USA and Russia, still developing in Asia

Direct E-commerce presence (% Brands, Contemporary Fashion DCM 2018)



Shop Features on Facebook and Instagram more developed in the Contemporary than in the Luxury Panel

Shop Feature on Socials (% Brands, Contemporary vs. Luxury DCM 2018)



Only Falconeri and Patrizia Pepe with “Made in Italy” disclosure on Web Product Pages

Example Falconeri with systematic approach

FALCONERI
Couture e filati naturali

PERSONALIZZA I TUOI CAPI FALCONERI RENDENDOLI UNICI

NEW DONNA UOMO STYLE PERSONALIZZA

HOME / NEW / TUTTE LE NOVITÀ / TUTTE LE NOVITÀ

DG1441A
GONNA PLISSÉ
€ 177,00

COLORE: GIALLO - 8385

TAGLIA: L
Solo 1 disponibilità a magazzino

AGGIUNGI AL CARRELLO

DESCRIZIONE
Gonna Plissé realizzata in morbida viscosa con interventi di filato lamé. È caratterizzata da un gioco di nervature e da una vestibilità leggermente svasata al fondo. Presenta una sottogonna abbinata per evitare l'effetto trasparenza.
La modella è alta 176 cm e veste una taglia M

MAKING OF

COMPOSIZIONE E LAVAGGIO
CORPO: 65% VISCOSA, 16% FIBRA METALLICA, 12% COTONE, 7% POLIAMIDE
INTERNO: 100% POLIESTERE
TESSUTO PRINCIPALE: 100% POLIESTERE

Made in Italy

Made in Italy

Source: <https://it.falconeri.com> © CALZEDONIA SPA, Contactlab and Netcomm Analysis

Digital Competitive Map - Contemporary Fashion 2018

Key Messages

- Overall Panel **competitive** on:
 - **Website** and **E-commerce Experience**
 - **International Socials**
 - **Localization** in European Countries and Russia
- ...while **trailing** on:
 - **Localization** outside Europe
 - **Cross-Channel Services**
 - **Style Advisory**
 - **“Made in” Transparency**