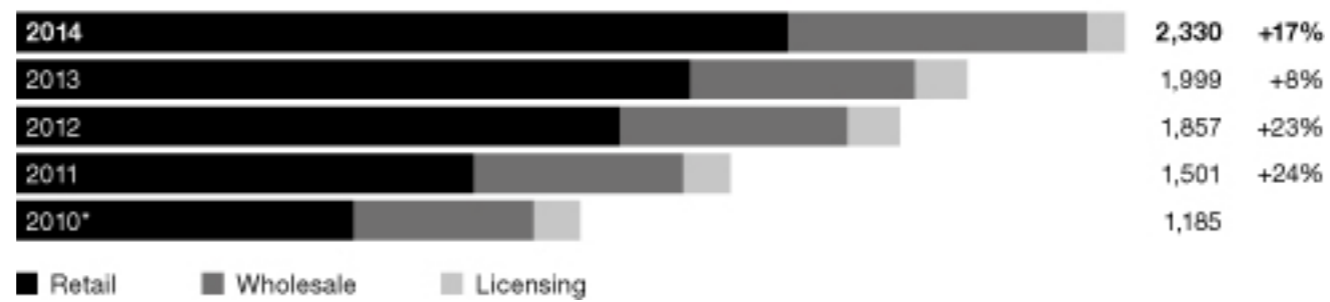




BURBERRY
ESTABLISHED 1856

£2,330M +17%



Vital statistics

1856

Established

Public

Type

1,001 - 5,000

Number of employees

£1,999m (2013)

Revenue

443

Stores

London, United Kingdom

HQ

Key people



Christopher Bailey

Chief Executive & Creative
Director

John Peace

Chairman



18,069,339 Likes

[Facebook.com/burberry](https://www.facebook.com/burberry)



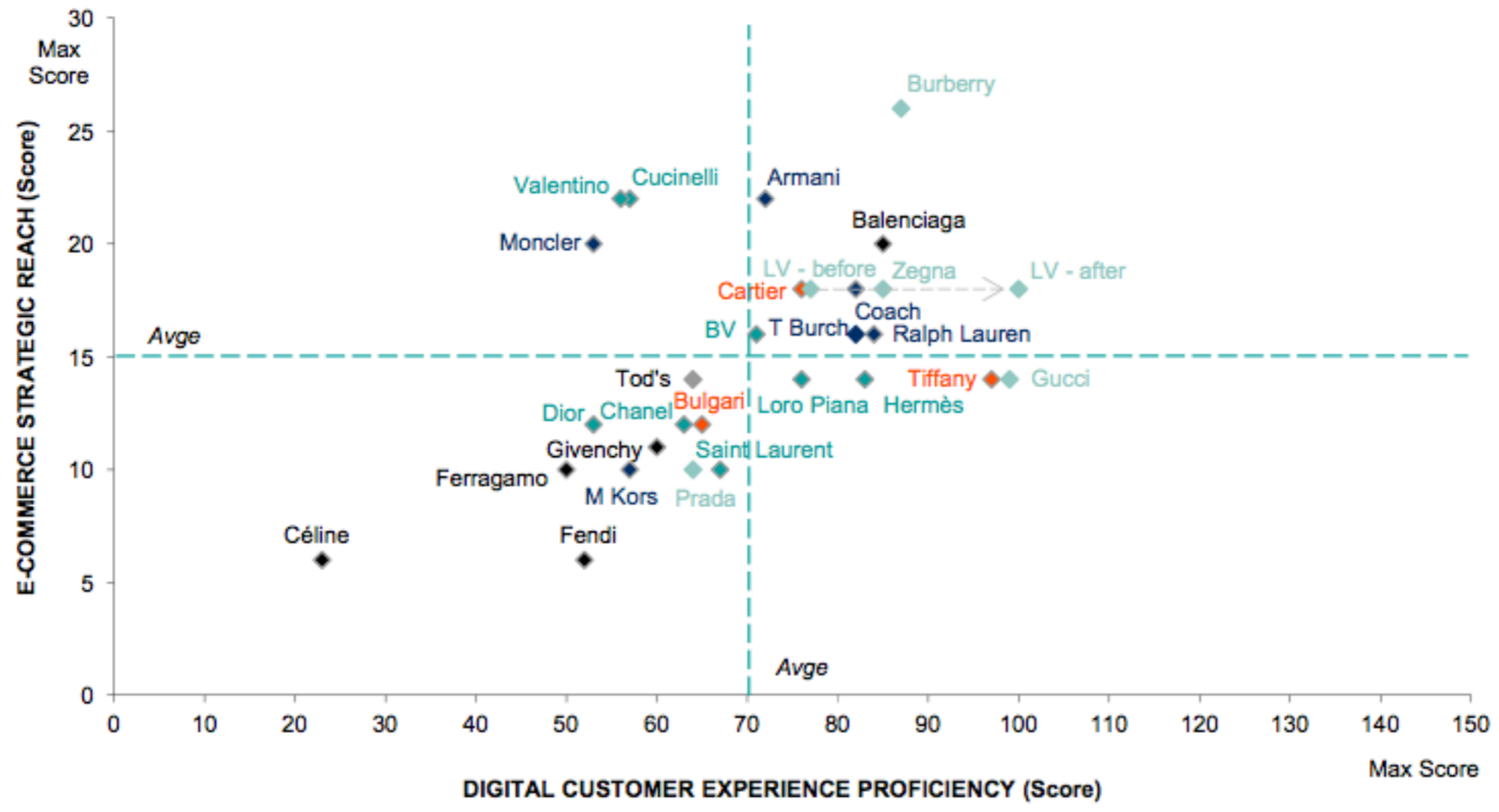
3,853,949 Followers

[Twitter.com/burberry](https://twitter.com/burberry)



3,288,392 Followers

[instagram.com/burberry](https://www.instagram.com/burberry)



Revenue by channel

in 2009/10



■ Retail	58%
■ Wholesale	34%
■ Licensing	8%

Burberry sells its products to the end consumer through both the retail (including digital commerce) and wholesale channels. For 2009/10, retail accounted for 58% of revenue and wholesale 34%.

Digital is expected to drive, on average, **40 percent** of projected sales growth from 2013 to 2020.

Opportunities to open physical retail space diminish and consumers will increasingly opt for the ease of shopping online.

2006.

Angela Ahrendts and Christopher Bailey.

“The vision was to be the first company who is **fully digital**”

“The number one strategy that came (from our first meeting) was all centred around the brand. We needed to purify the brand message and how we were going to do that;
by focusing on outerwear,
by focusing on digital,
by targeting a younger consumer”.

Figure 4: Burberry stands out for its E-Commerce Reach (full coverage by country, language and product). Six brands 'Powered by' Yoox rank in the top 10

E-Commerce Strategic Reach – Overall Brand Ranking (USA, July 2014)

Monobrand	OVERALL SCORE	ONLINE GEOGRAPHICAL COVERAGE			LANGUAGES				ONLINE PRODUCT RANGE	
		Key Countries	China	Russia	Brazil	Key Languages	Chinese	Russian	Portuguese	% Categories
Burberry	26	6	Y	Y	N	8	Y	Y	Y	100%
Armani *	22	5	Y	Y	N	5	Y	Y	N	90%
Cucinelli *	22	5	Y	Y	N	4	Y	Y	N	100%
Valentino *	22	4	Y	Y	N	4	Y	Y	Y	100%
Balenciaga *	20	5	Y	Y	N	6	Y	N	N	100%
Moncler *	20	2	Y	Y	N	6	Y	Y	N	100%
Cartier	18	3	N	N	N	8	Y	Y	Y	100%
Coach	18	2	Y	N	N	7	Y	N	Y	100%
Louis Vuitton	18	3	N	N	Y	8	Y	Y	Y	81%
Zegna *	18	3	N	Y	N	8	Y	Y	N	100%
Bottega Veneta *	16	5	HK	N	N	5	Y	N	N	100%
Ralph Lauren	16	4	N	N	N	8	Y	Y	N	100%
Tory Burch	16	3	Y	N	N	5	Y	N	N	100%
Gucci	14	5	N	N	N	7	Y	N	N	100%
Hermès	14	3	N	N	N	7	Y	Y	N	100%
Loro Piana	14	2	Y	N	N	2	Y	N	N	100%
Tiffany	14	3	N	N	N	7	Y	N	Y	100%
Tod's	14	2	N	N	N	7	Y	Y	N	86%
Dior	12	1	N	N	N	8	Y	Y	Y	7%
Bulgari	12	2	N	N	N	6	Y	N	N	89%
Chanel	12	0	N	N	N	9	Y	Y	Y	7%
Givenchy	11	App	N	App	N	2	Y	N	N	86%
Ferragamo	10	4	N	N	N	6	Y	N	N	78%
Michael Kors	10	1	N	N	N	3	Y	N	Y	96%
Prada	10	3	N	N	N	7	Y	N	N	61%
Saint Laurent *	10	4	HK	N	N	5	N	N	N	91%
Céline	6	0	N	N	N	4	Y	N	N	0%
Fendi	6	0	N	N	N	6	Y	N	N	0%

From 5 to 6	ML China	Yes	From 8 to 10	Yes	Yes	Above 85%
From 2 to 4	HK		From 4 to 7			Between 50% and 85%
From 0 to 1	No	No	From 1 to 3	No	No	Below 50%

Figure 8: Louis Vuitton, Gucci and Tiffany lead in offering customers the best digital experience

Digital Customer Experience Proficiency – Overall brand ranking


Monobrand	OVERALL POINTS	DIGITAL CUSTOMER EXPERIENCE PROFICIENCY										
		WEBSITE EXPERIENCE					E-COMMERCE EXPERIENCE		CROSS CHANNEL EXPERIENCE			
		DISPLAY VISUALIZATION	PRODUCT PRESENTATION	PRODUCT SELECTION	BASIC CUSTOMER SERVICE	PERSONAL SERVICES	ONLINE SHOPPING	DELIVERY	STORE FINDER	CROSS CHANNEL SERVICES	SHARE	APPS
Louis Vuitton	100	5	27	1	1	3	20	9	1	4	1	1
Gucci	99	10	1	17	4	1	8	1	5	4	1	13
Tiffany	97	1	9	6	4	3	8	5	15	3	1	1
Burberry	87	10	1	13	1	5	16	9	7	2	16	18
Balenciaga	85	10	9	6	4	11	2	2	7	14	1	18
Zegna	85	27	9	6	4	5	2	20	3	4	1	18
Ralph Lauren	84	10	9	13	4	5	5	8	6	4	22	13
Hermès	83	10	9	13	4	19	11	5	4	12	1	1
Coach	82	21	4	1	4	14	5	16	24	1	1	18
Tory Burch	82	10	9	1	4	19	5	16	10	12	1	1
Cartier	76	22	9	1	4	10	16	16	25	4	16	6
Loro Piana	76	22	1	1	4	12	26	16	7	4	16	13
Armani	72	10	4	6	4	5	11	24	15	19	16	6
Bottega Veneta	71	5	9	13	4	14	8	2	12	19	1	18
Saint Laurent	67	1	9	6	4	19	1	20	21	19	1	18
Bulgari	65	1	24	21	4	19	23	9	21	4	1	6
Prada	64	10	9	26	24	5	20	2	12	4	26	18
Tod's	64	22	9	23	4	1	11	9	27	16	16	13
Chanel	63	10	24	6	4	19	16	9	21	19	1	13
Givenchy	60	5	4	23	4	19	16	5	10	16	26	6
Cucinelli	57	22	4	6	24	19	11	24	17	19	1	18
Michael Kors	57	27	9	18	1	14	11	20	27	14	16	6
Valentino	56	10	4	21	24	14	20	20	17	19	1	6
Dior	53	10	24	23	4	19	25	9	12	16	22	6
Moncler	53	1	9	18	24	19	2	24	17	19	22	18
Fendi	52	5	9	26	28	12	27	n.a.	1	19	1	1
Ferragamo	50	5	9	18	4	14	23	9	25	19	22	18
Céline	23	22	27	26	4	19	28	n.a.	17	19	26	18

Source: ContactLab Analysis (USA, July 2014)

Figure 3: ... yet luxury goods players are moving slowly in building digital capabilities. Only six new country e-stores have been added to those active in 2013 (o.w. three new e-stores in S. Korea)

E-Commerce – Key country shipping by mono-brand (July 2014)

BRAND	KEY COUNTRIES									Total Countries	
	USA	Europe	Japan	China	S. Korea	HK	Russia	UAE	Brazil		
Burberry	x	x	x	x	x	x	x	x		8	
Balenciaga	x	x	x	x	x	x	x			7	
Cucinelli	x	x	x	x	x	x	x			7	
Armani	x	x	x	x	x	x	x			7	
Valentino	x	x	x	x		x	x			6	
Bottega Veneta	x	x	x		x	x				5	
Gucci	x	x	x		x			x		5	
Ferragamo	x	x	x		x					4	
Louis Vuitton	x	x	x						x	4	
Ralph Lauren	x	x	x		x					4	
Moncler	x	x		x			x			4	
Saint Laurent	x	x	x			x				4	
Tory Burch	x	x	x	x						4	
Zegna	x	x	x				x			4	
Coach	x		x	x						3	
Hermès	x	x	x							3	
Loro Piana	x	x		x						3	
Cartier	x	x	x							3	
Prada	x	x	x							3	
Tiffany	x	x	x							3	
Tod's	x	x								2	
Bulgari	x		x							2	
Dior	(Beauty)	x								1	
Michael Kors	x	PHONE NUMBER / NET-A-PORTER									1
Givenchy	NET A PORTER IOS APP ONLY, SEPARATION WOMEN AND MEN									App	
Chanel	(Beauty)	NO E-COMMERCE									0
Fendi	NO E-COMMERCE									0	
Céline	NO E-COMMERCE									0	
TOTAL	23	21	19	9	8	7	7	2	1		

 Additions July 2014 vs. July 2013

Note: Counting only for Fashion, not for websites focused on Beauty

Source: ContactLab Analysis

Figure 13: Coach – followed by Burberry – stands out for overall cross-channel services. Collect in Store, Online Order in Store and In-Store Availability are key and valuable features, yet offered by few brands

Cross-channel experience: Cross-channel services (USA, July 2014)

Monobrand	BRAND RANKING	CROSS CHANNEL SERVICES				
		In Store Availability	Collect in Store	Return in Store	Online Order in Store	Product Exchange
Coach	1	YES	YES	YES	NO	YES (Online & In-Store)
Burberry	2	NO	YES	YES	NO	YES (Only In-Store)
Tiffany	3	NO	YES (Selected Locations in NY)	YES	NO	YES (Online & In-Store)
Bulgari	4	NO	NO	YES	NO	YES (Online & In-Store)
Cartier	4	NO	NO	YES	NO	YES (Online & In-Store)
Gucci	4	YES	NO	YES	NO	NO
Loro Piana	4	NO	NO	YES	NO	YES (Online & In-Store)
Louis Vuitton	4	NO	NO	YES	NO	YES (Online & In-Store)
Prada	4	NO	NO	YES	NO	YES (Only In-Store)
Ralph Lauren	4	NO	NO	YES	NO	YES (Online & In-Store)
Zegna	4	NO	YES (7 Selected Stores)	YES (Selected Stores)	YES	NO
Hermès	12	NO	YES (Selected Stores)	NO	NO	YES (Online & In-Store)
Tory Burch	12	NO	NO	YES	NO	YES (Only Online)
Balenciaga	14	YES	NO	NO	NO	NO
Michael Kors	14	NO	NO	NO	NO	YES (Online & In-Store)
Dior	16	NO	NO	NO	NO	YES (Only Online)
Givenchy	16	NO	NO	NO	NO	YES (Only Online)
Tod's	16	NO	NO	NO	NO	YES (Only Online)
Amani	19	NO	NO	NO	NO	NO
Bottega Veneta	19	NO	NO	NO	NO	NO
Céline	19	NO	n.a.	n.a.	NO	n.a.
Chanel	19	NO	NO	NO	NO	NO
Cucinelli	19	NO	NO	NO	NO	NO
Fendi	19	NO	n.a.	n.a.	NO	n.a.
Ferragamo	19	NO	NO	NO	NO	NO
Moncler	19	NO	NO	NO	NO	NO
Valentino	19	NO	NO	NO	NO	NO
Saint Laurent	19	NO	NO	NO	NO	NO

Broadly Offered	Broadly Offered	Broadly Offered	Broadly Offered	Offered Online & Offline, or Offline-Only
Offered in Selected Stores Only	Offered in Selected Stores Only	Offered in Selected Stores Only	Offered in Selected Stores Only	Offered Only Online
Not Offered	Not Offered	Not Offered	Not Offered	Not Offered

Source: ContactLab Analysis

Brazil
Russia
China
South Korea
UAE

Unlike Burberry, most luxury brand are very slow to cater online to emerging markets.



“I’d rather walk naked down the street than join facebook”

-Pheobe Philo, Creative Director @ Celine

Burberry excels in strategic e-commerce reach, with online sales across all product categories available in a wide array of countries and languages.

*Still room to improve on overall User Experience.



Daniel Hief
BBC -> Burberry



Angela Ahrendts
Burberry -> Apple



BURBERRY KISSES

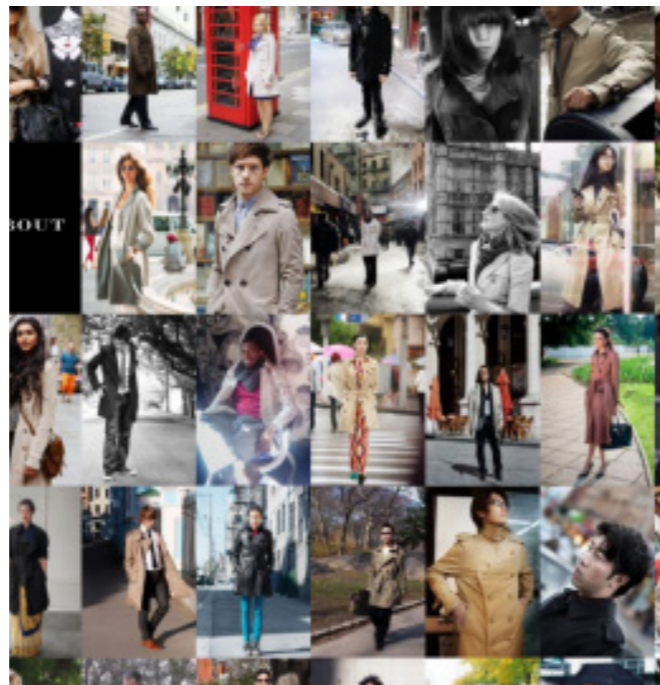
Powered by Google™

MEDIA CONTENT COMPANY?

or

FASHION DESIGN COMPANY?

- *Live streamed catwalk shows**
- *Viral social media campaigns**
- *Nurturing online communities**



Campaigns
Burberry Kisses
Burberry Acoustic
Art of the Trench
Bespoke

Twitter

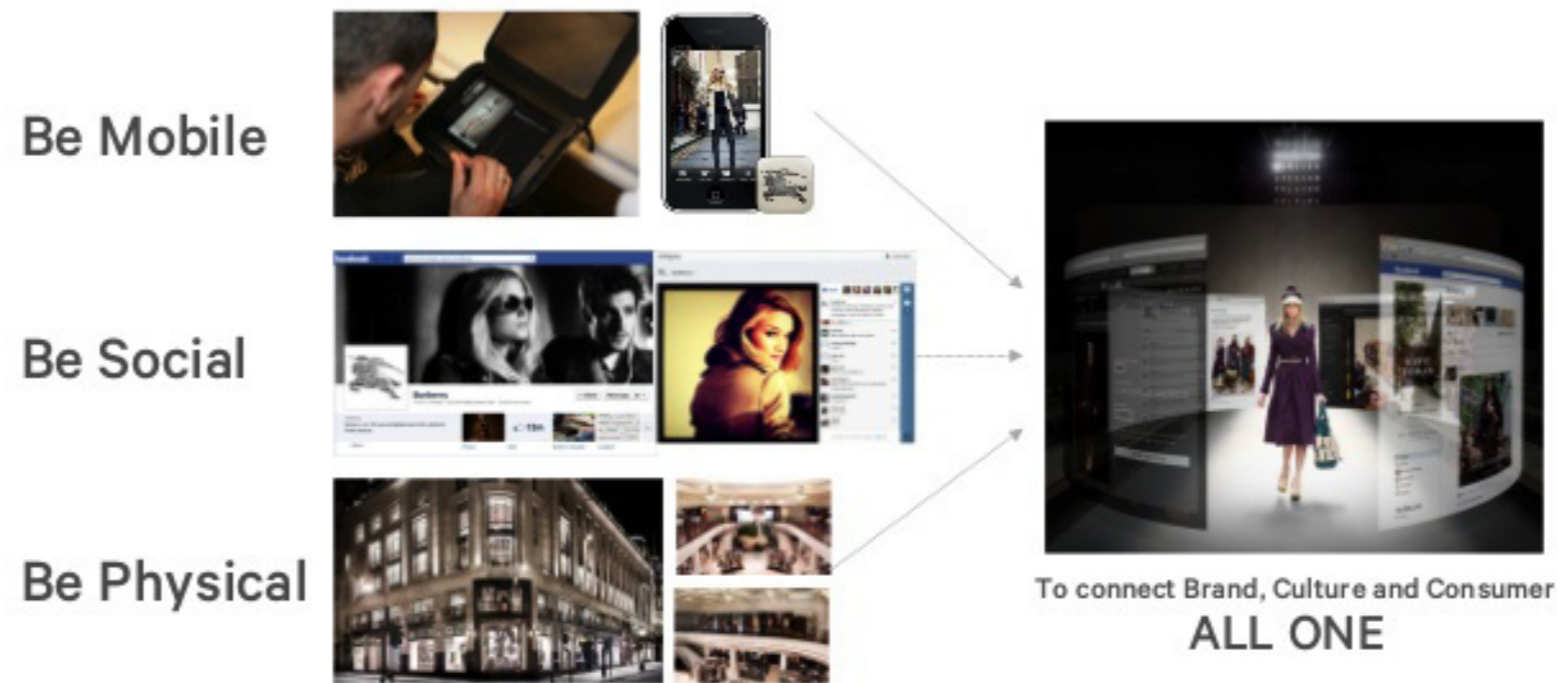
@BurberryService, an official Twitter account for dealing with customer service enquiries that's available a remarkable 24 hours a day, 7 days a week. **WOW.**

70% of employees at Burberry's headquarters are now under 30 years old and according to Ahrendts are "fast, flexible, dynamic and open to change"

The flagship retail store on Regent Street in London is inspired by the site map of Burberry.com, with the layout and architecture mirroring that of the website. Floor space in the store is split between Bespoke, 'ready-to-wear', Acoustic and Experiences, similar to how they're divided on Burberry.com.



The Connection and Coherence of All the Channels : A 360° Experience, Any Device, Anywhere, Anytime



“All this technology needed to be linked up so that we could have a single customer view that we could use across channels, mediums and platforms”

A. Ahrends



YOOX

NET-A-PORTER

KERING

BOTEGGA VENETA

SAINT LAURENT

BALENCIAGA

ABOUT
BURBERRY

INVESTOR
RELATIONS

CORPORATE
RESPONSIBILITY

GREAT BRAND, GREAT
COMPANY

OUR PEOPLE

COMMUNITY

ETHICAL TRADE

ENVIRONMENT

BURBERRY FOUNDATION

CALIFORNIA
TRANSPARENCY ACT

MEDIA CENTRE

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Careers

GREAT BRAND
GREAT COMPANY

OUR
PEOPLE

ETHICAL
TRADE

ENVIRONMENT

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FOUNDATION

COMMUNITY

