

Meeting consumers where they are

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The background features a large, dark blue, irregular shape on the right side, which contains the text. To its left is a bright yellow, irregular shape. The overall composition is set against a light gray background.

Making
the everyday
extraordinary

Consumer habits continue to evolve rapidly

Consumer insight crucial for the company to:

- **continue to stay relevant**
- **be able to meet consumers where, when and however they want**
- **proactively develop offering and services**

**Making the everyday
extraordinary**

GLOBAL INFLUENCES



Fiskars Group distribution channels

WHOLESALE

Pureplay e-comm
**Wholesale e-comm
& offline**
Other

DIRECT TO CONSUMER

~350 own locations

E-comm:

FISKARS®  **GERBER**

Gilmour  **iittala®**

ROYAL DOULTON
LONDON 1815


ROYAL COPENHAGEN
PURVEYOR TO HER MAJESTY THE QUEEN OF DENMARK

WATERFORD **WEDGWOOD**
ENGLAND 1759

HOSPITALITY & B2B



Target: increase share of direct to consumer sales

Current state:

- **LIVING:**
Currently ~1/3 of net sales
- **FUNCTIONAL:**
Currently small



E-commerce landscape in our categories

E-commerce is the fastest growing channel in our categories

In the product categories we operate in, an estimated 10-30% is sold online

Both direct and indirect e-commerce channels

Indirect channel including pureplay e-commerce players and traditional players' e-commerce



Right capabilities enabling direct e-commerce growth

Direct e-commerce channel growing

**Share of group net sales still lower than in other categories,
such as fashion**

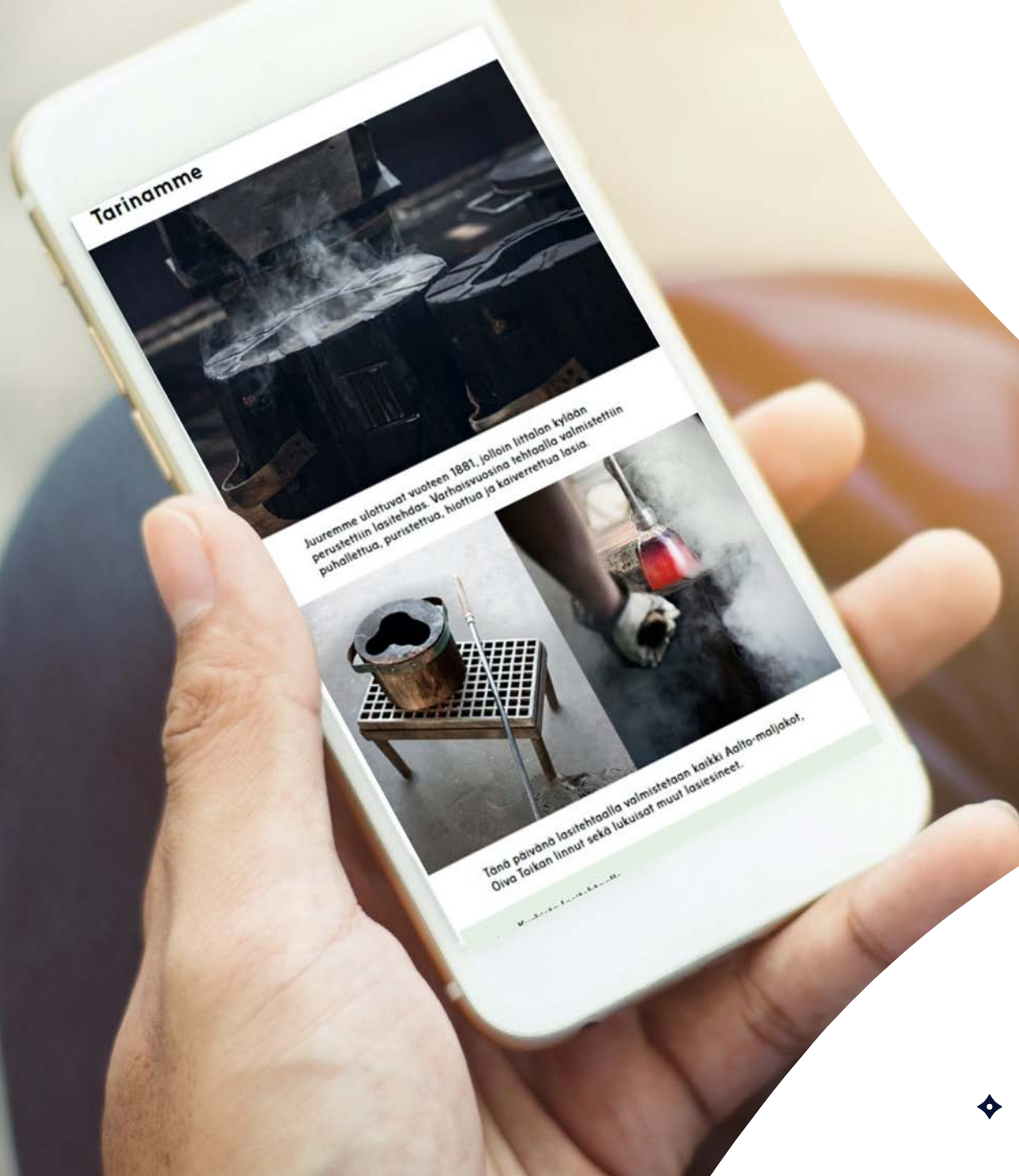
**Shared group
capabilities**

**Unified platform
in roll-out phase**

Global logistics



Case: iittala.com



1.3
million
myiittala
members

**Strong
double-digit %**

net sales growth
CAGR in 2015-18

**Strong
double-digit %**

Increase in average
customer value with
inspirational
messaging



Size gives us an advantage

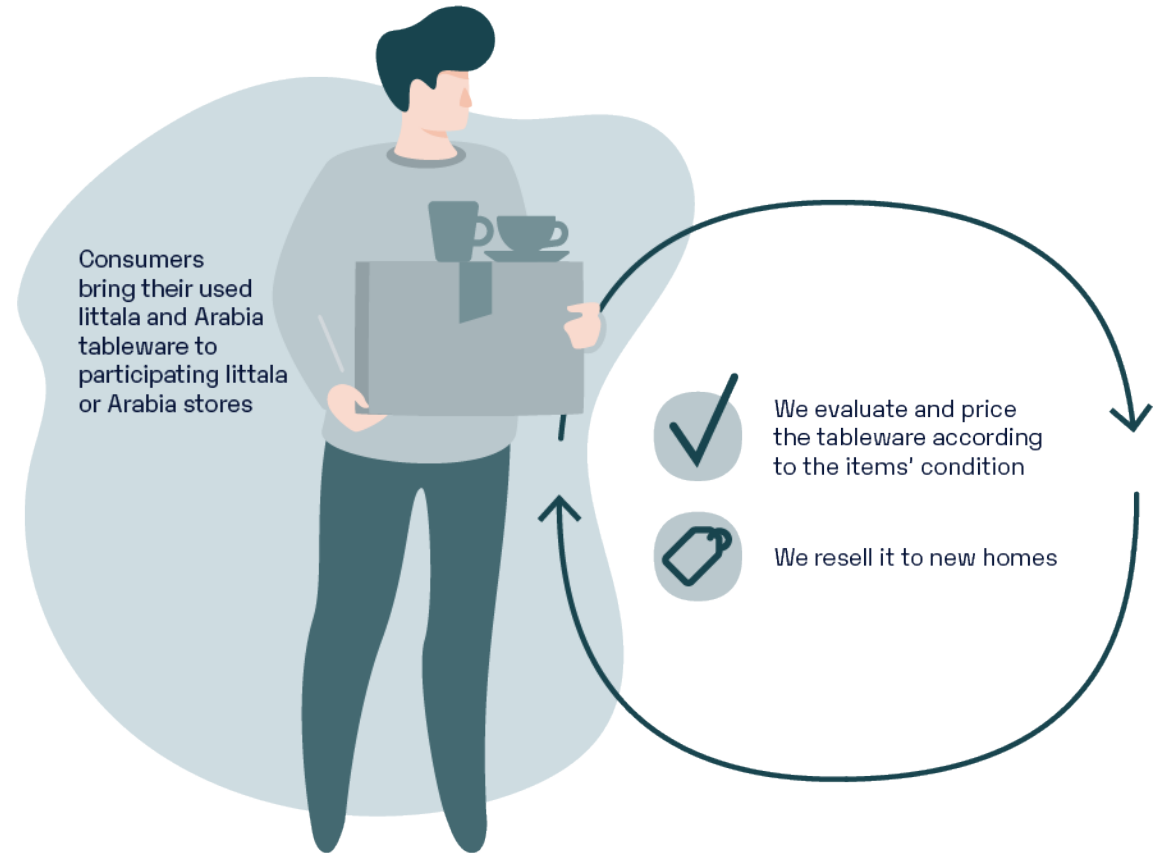
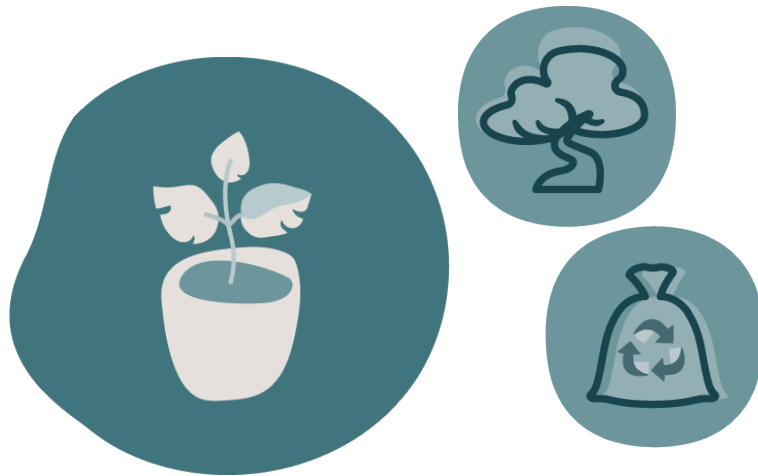
Efficiency in e-commerce

Consumer insight capabilities



New flagship store concepts to be rolled out, omnichannel focus

Stores as a platform for new services



Stores support implementation of services

vintage

**Rolled out in all own
iittala stores in Finland
in 2019**

**E-commerce extension
in piloting phase**

**Assessing expansion to
other countries**



Other service models under development

Responding to new consumer habits, such as sharing and renting

Arabia launched subscription service on November 18, 2019



Appendices



Brands with own e-commerce

iittala®


ROYAL COPENHAGEN
PURVEYOR TO HER MAJESTY THE QUEEN OF DENMARK

ROYAL DOULTON
LONDON

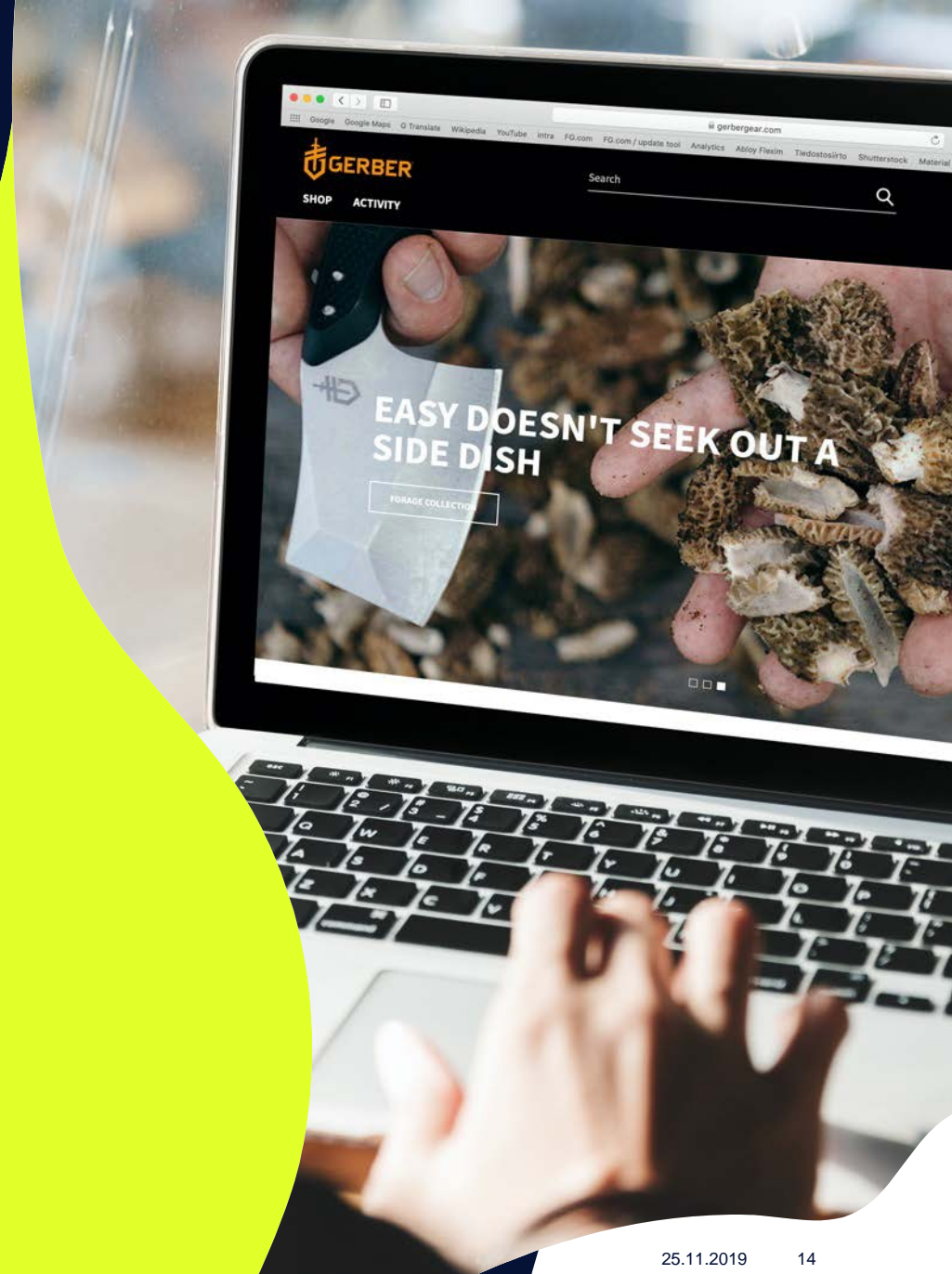
WATERFORD

WEDGWOOD
ENGLAND 1759

FISKARS®

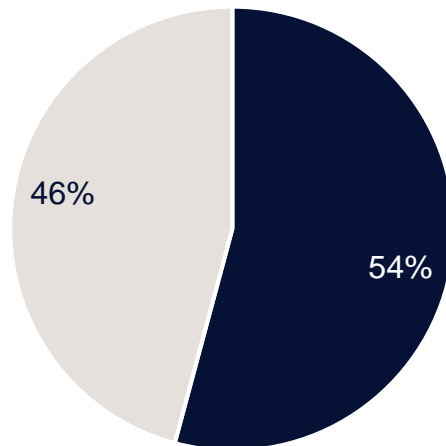
 **GERBER®**

Gilmour



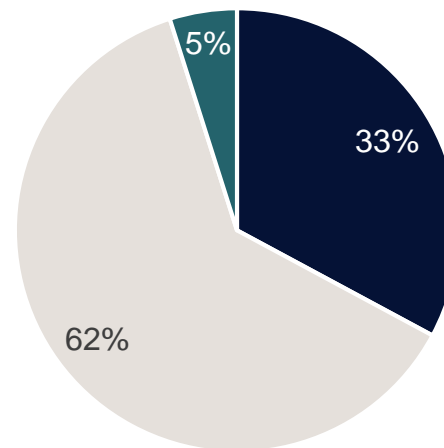
A total of 347 own stores at the end of 2018

BY BUSINESS



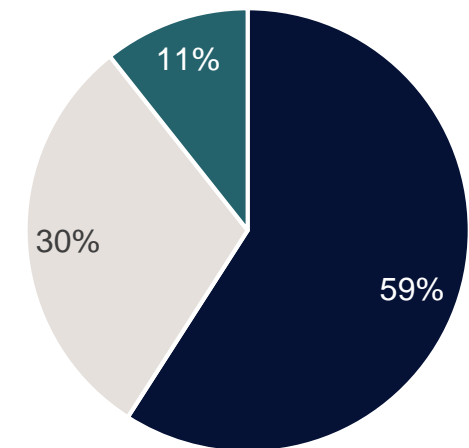
■ English & Crystal Living
■ Scandinavian Living

BY REGION



■ EMEA ■ APAC ■ Americas

BY TYPE



■ Concession ■ Outlet ■ Store

