

Meeting consumers where they are

Kristian Tammela, Manager, Investor Relations
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The background features a large, dark blue, irregular shape on the right side, and a bright yellow, irregular shape on the left side. The text is centered within the dark blue area.

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**

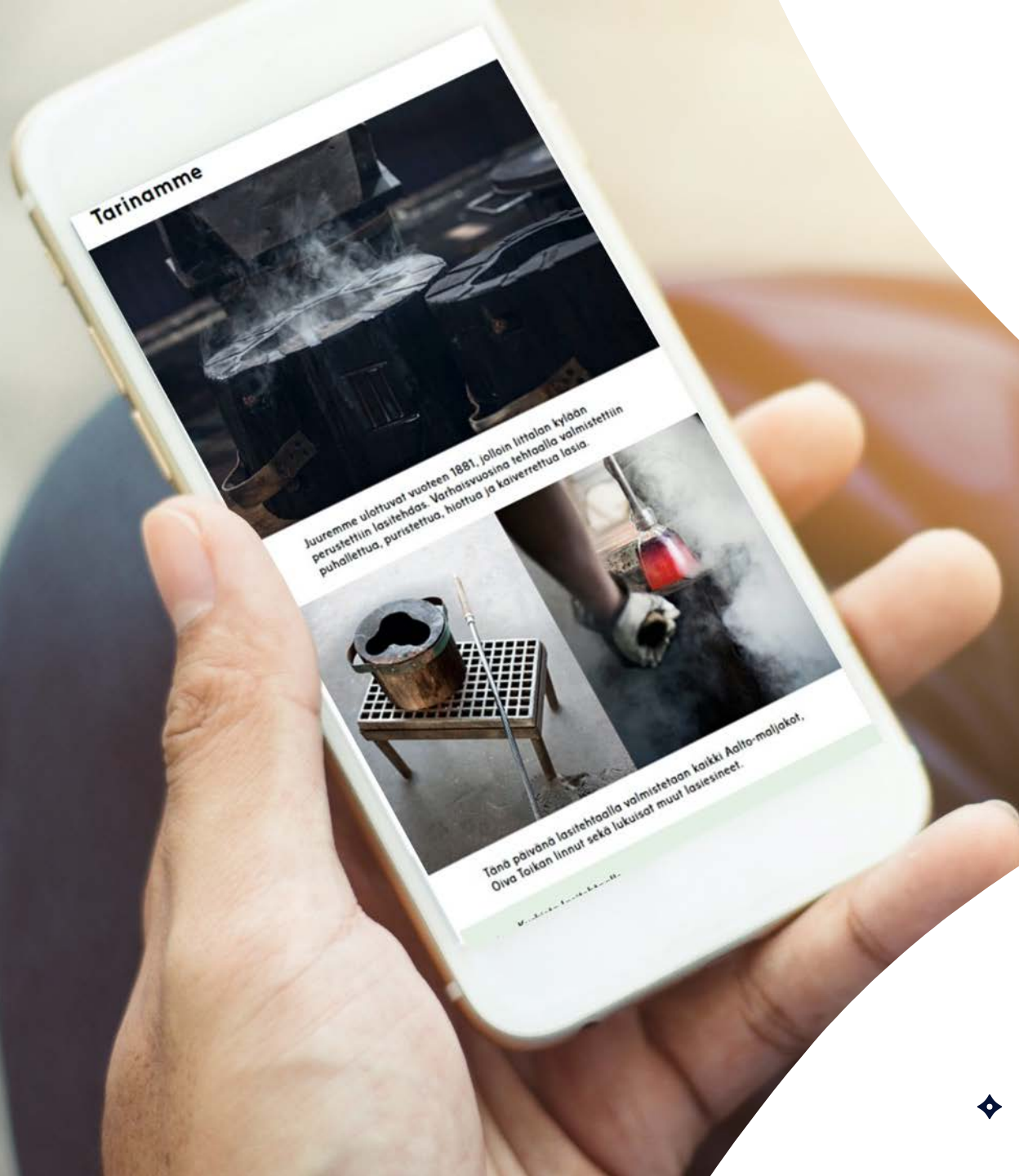
**Shared group
capabilities**

**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

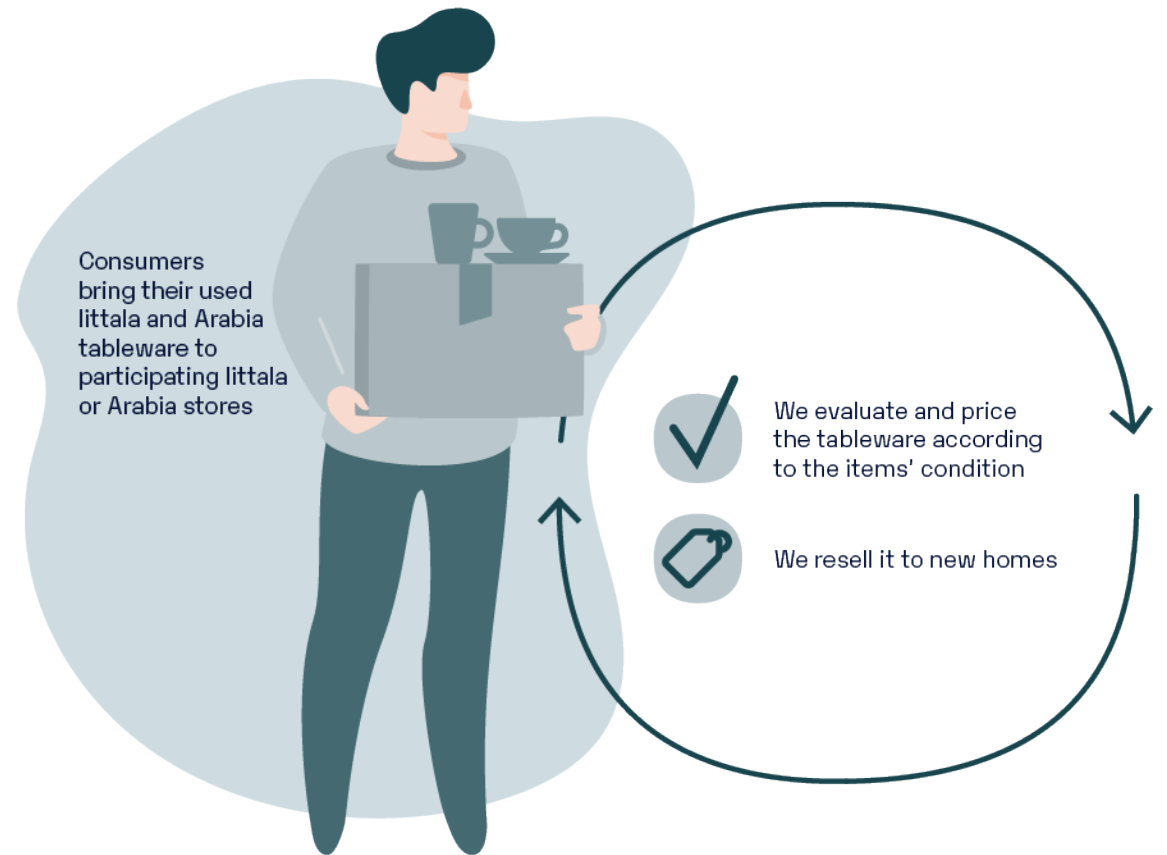
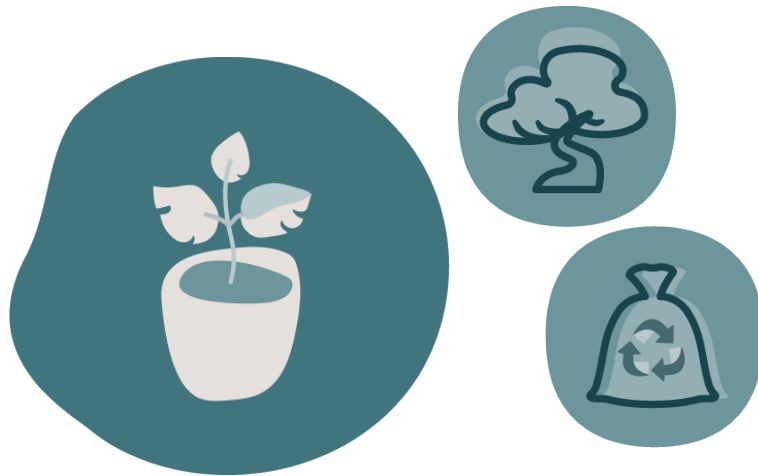
Efficiency in e-commerce

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

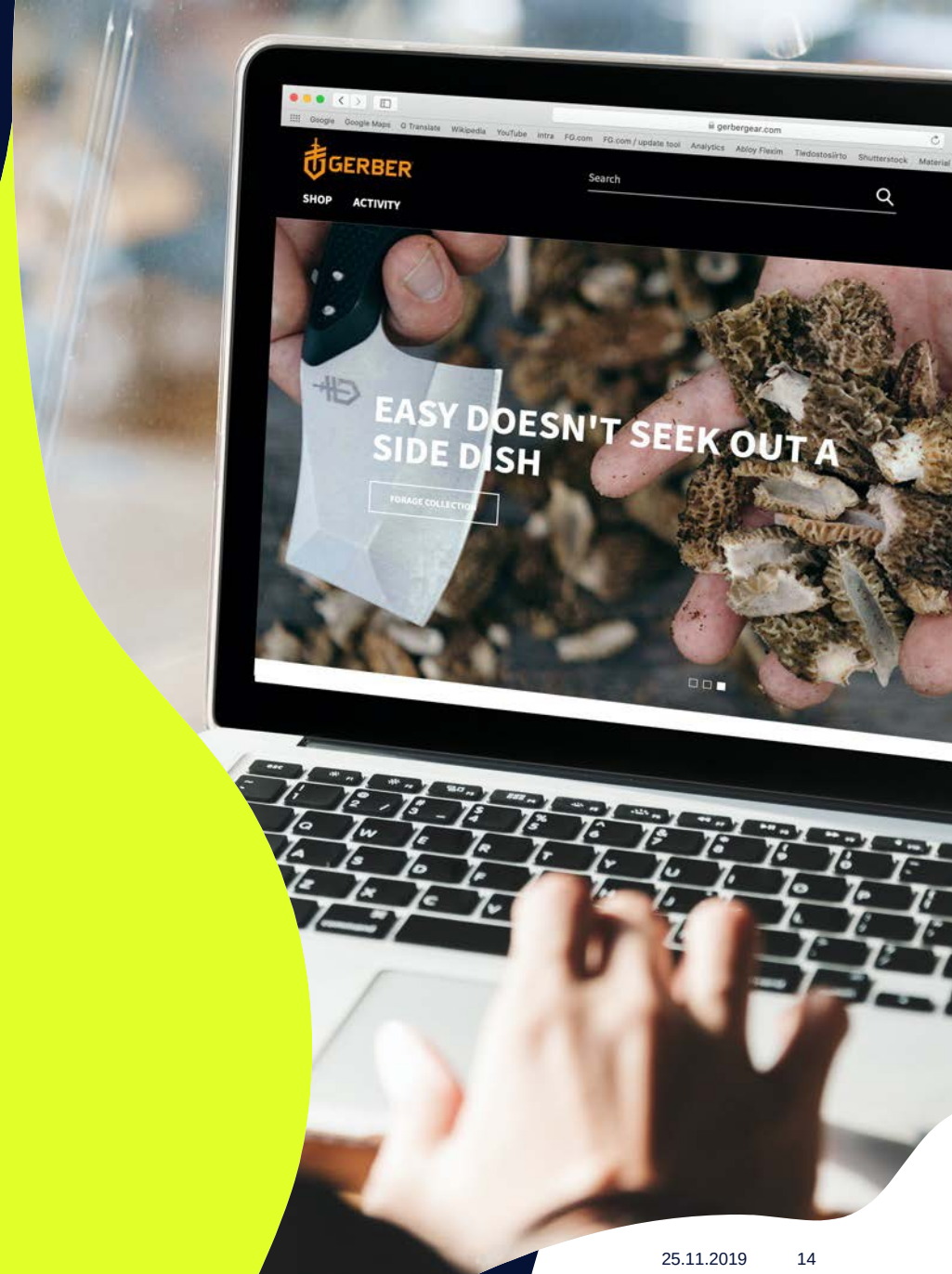
WATERFORD

WEDGWOOD
ENGLAND 1759

FISKARS®

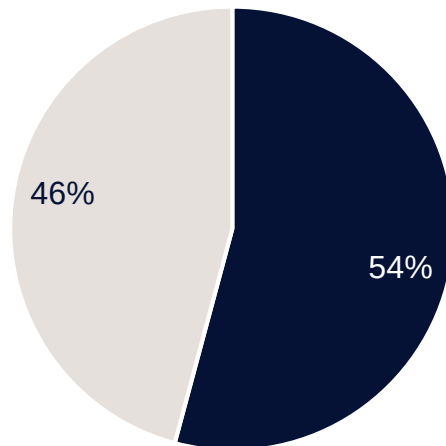
 **GERBER®**

Gilmour



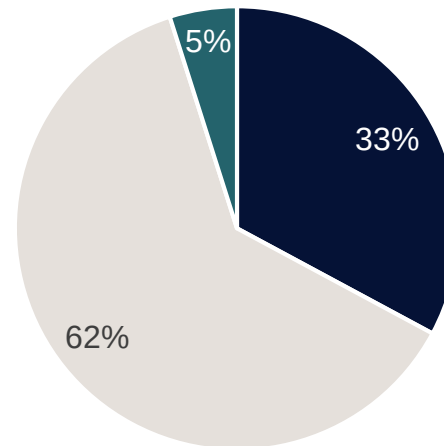
A total of 347 own stores at the end of 2018

BY BUSINESS



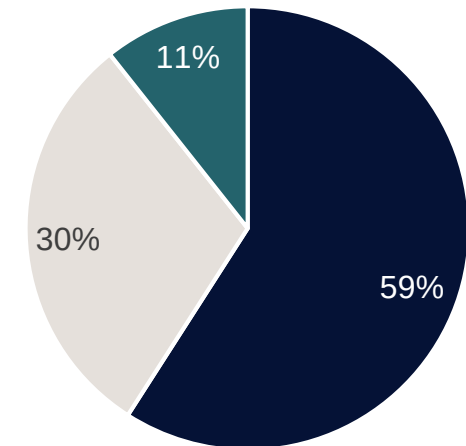
■ English & Crystal Living
■ Scandinavian Living

BY REGION



■ EMEA ■ APAC ■ Americas

BY TYPE



■ Concession ■ Outlet ■ Store

