

This is a redacted version. To request the full presentation, please email [info@euromonitor.com](mailto:info@euromonitor.com).

# Disruptors Within Luxury and the Impact on the Overall Business

---

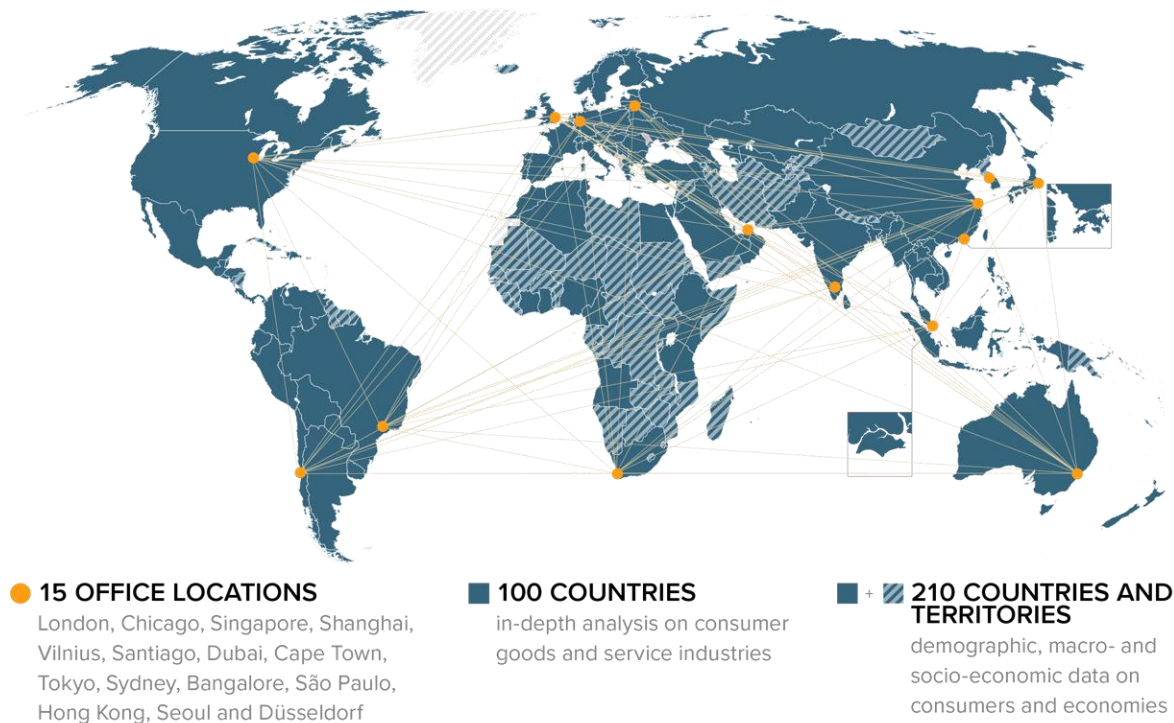
Luxury FirstLook, January 2019

Fflur Roberts, Head of Luxury Goods Research

This PowerPoint presentation includes proprietary information from Euromonitor International and cannot be used or stored with the intent of republishing, reprinting, repurposing or redistributing in any form without explicit consent from Euromonitor International.

For usage requests and permission, please contact us  
<http://www.euromonitor.com/locations>.

# Euromonitor International network and coverage





01.

# Industry Overview

Global luxury goods  
market exceeds  
US\$1 trillion

## Global Growth in Retail Formats, 2017-18

### Store-Based



+5%

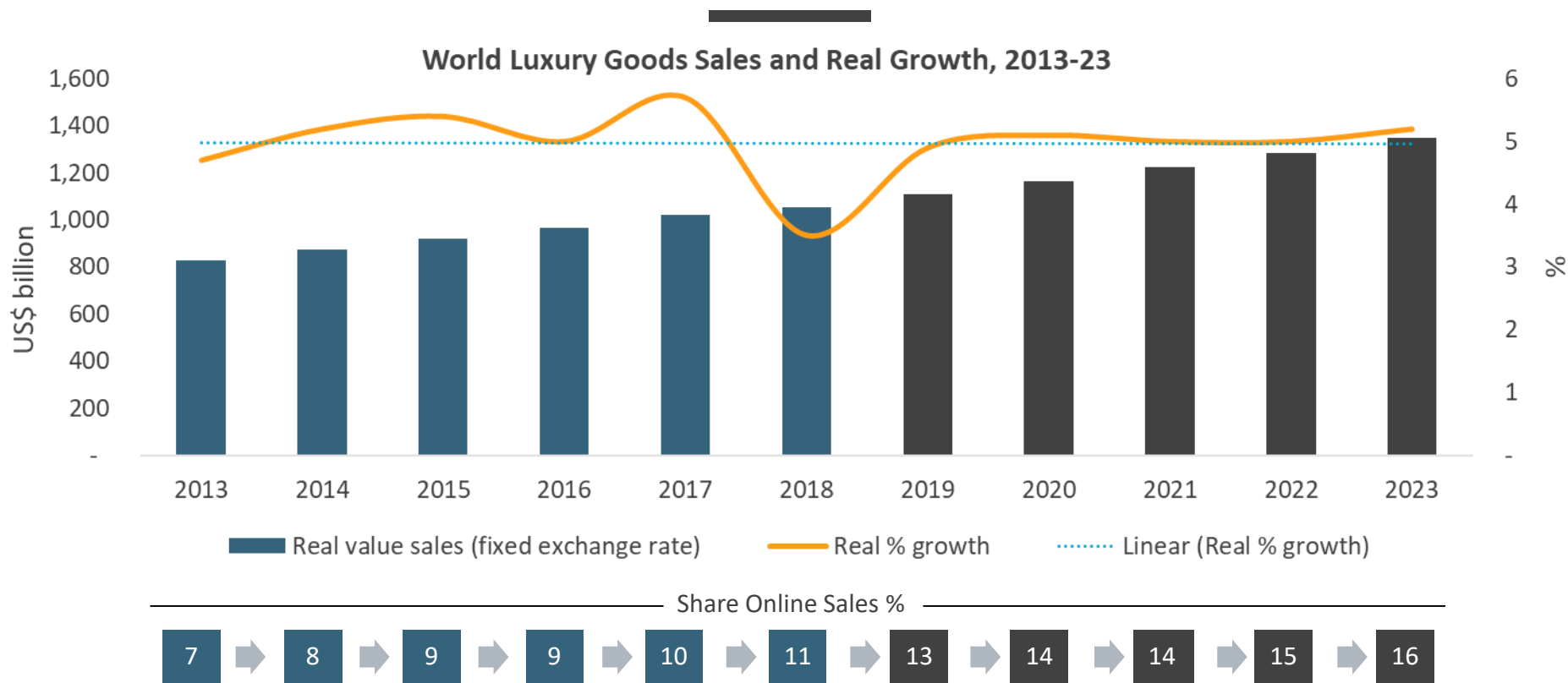
### Digital



+14%



# Healthy global performance





02.

## Disruptors in Luxury

# Redefined consumer values and priorities: Euromonitor identifies five key disruptors in luxury



Shifting Market Frontiers



Demographic Shifts



Sustainability



Digital Drivers



Experience More



## Demographic shifts

---



Middle class households in developed economies have not improved their standard of living and struggle to maintain their economic status.



The need to optimize on limited resources means focusing more on obtaining the most value for money.



Value is not only about price. Areas like quality, experience, authenticity and convenience are playing an important role.



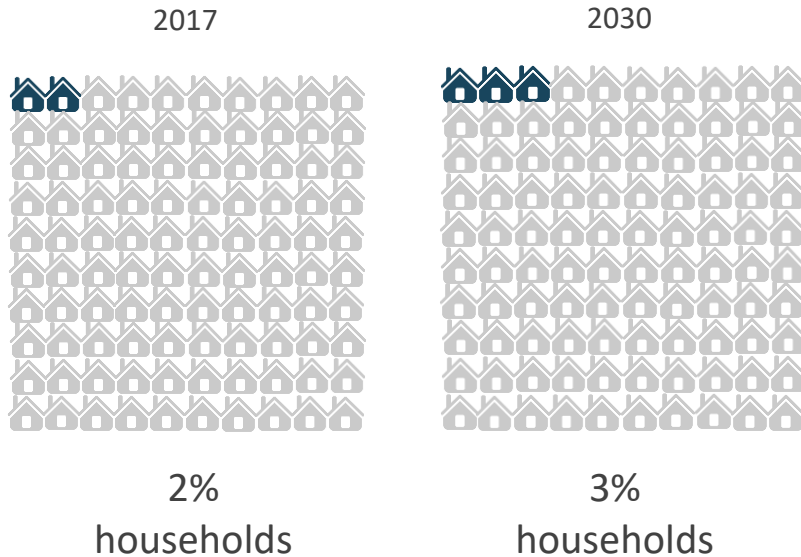
The accumulation of “stuff” has become less important making headway for simplicity and frugality.



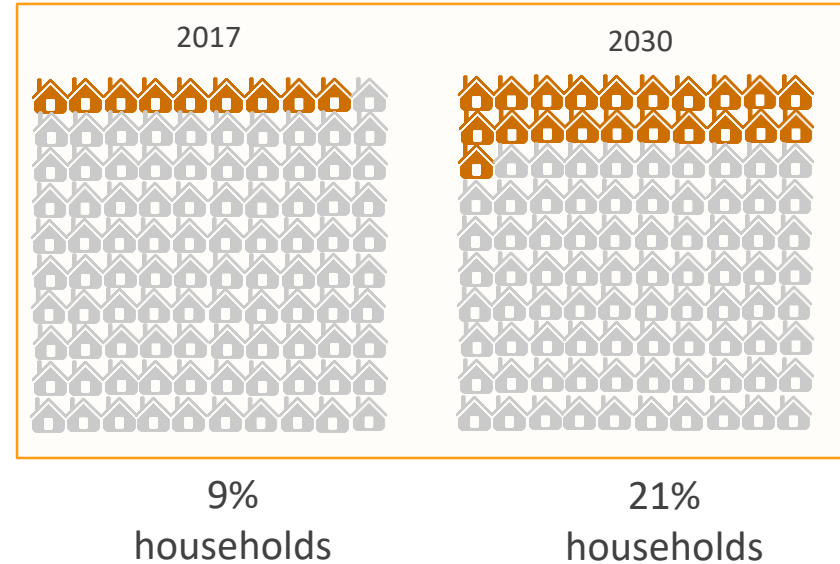
This trend has the potential to be disruptive to a number of industries and opens up a number of new opportunities.

## Exclusive yet inclusive: More room for affordable luxury and premiumization

Global Households with Disposable Income over US\$300,000 as % of Total



Global Households with Disposable Income over US\$100,000 as % of Total



Source: Euromonitor International

This is a redacted version. To request the full presentation, please email [info@euromonitor.com](mailto:info@euromonitor.com).

Thank you