



L'e-commerce nel retail moda-lusso

Potential to delight?

7 novembre, 15.30 – 17:00

BAIN & COMPANY 

Who we are



Valentina Gorgoglione

Manager

Bain & Company

- ~8 years of experience in Consulting
- Practices Digital Payments / Retail & Luxury



Enrico Febelli

Managing Director

N&TS GROUP

- ~25 years of experience in payments
- Previously Chief Service Officer N&TS GROUP



Alessandro Viola

Head of Corporate Sales

Nexi

- ~18 years of experience
- Previously Basilichi Marketing and Sales Director, Retail Distribution Director (SIKA AG)

Anthony Di Pascale

Product Manager

Axepta

- >6 years of experience
- Last >4 years on e-commerce and digital payments



Filippo Manca

Head of Merchant Sales

VISA Italy

- ~25 years of experience in sales and business development, Issuing and Acquiring, Retailers and Financial institutions.
- Previously in Vodafone e Banca Commerciale Italiana (now ISP)



Antonio Galiano

Head of E-Bank

ICCREA

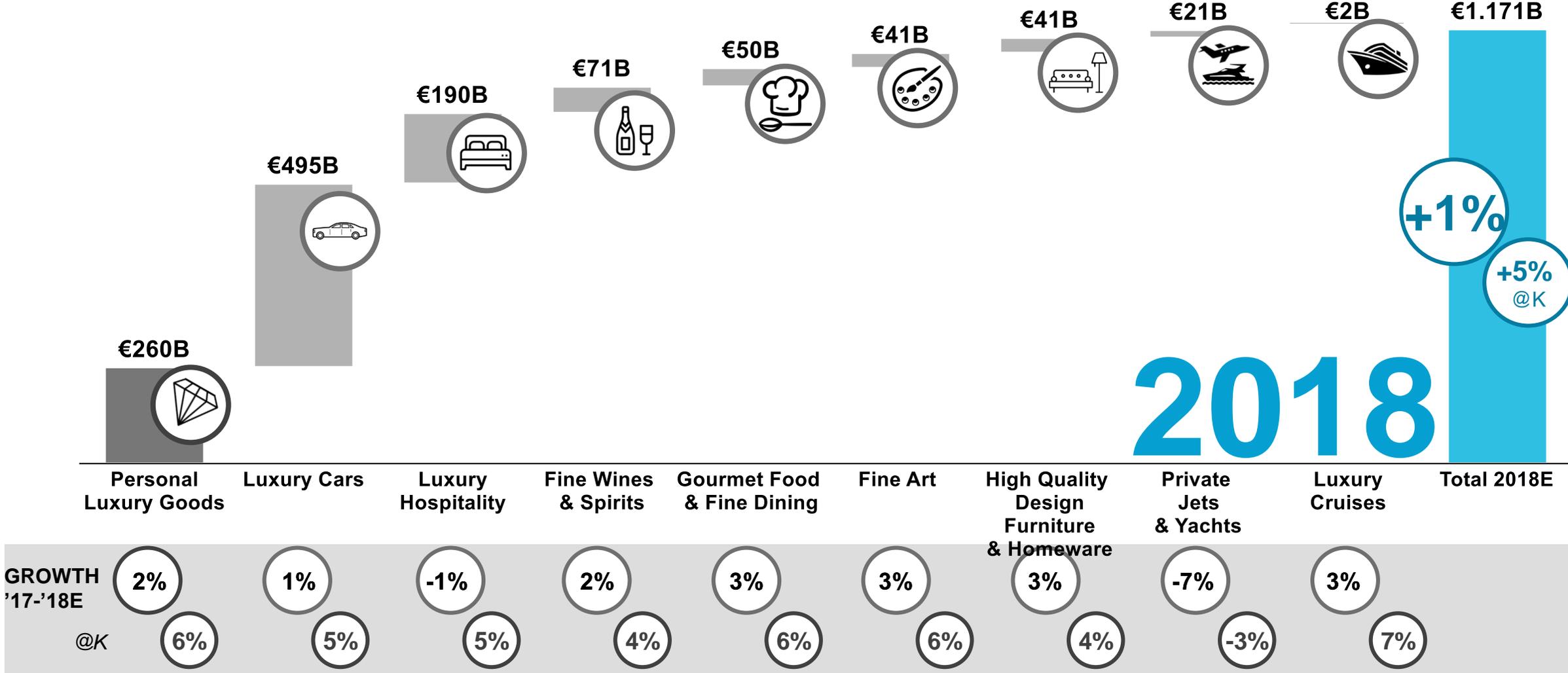
- ~22 years of experience in digital payments transformation and fintech investments (i.e. Satispay, Ventis, tmqstore.com)
- Board member of Visa, Bancomat, Ventis, TMQ



Global luxury markets: ~1.2T€, with 5% real-term growth in 2018

Global luxury goods markets | €B

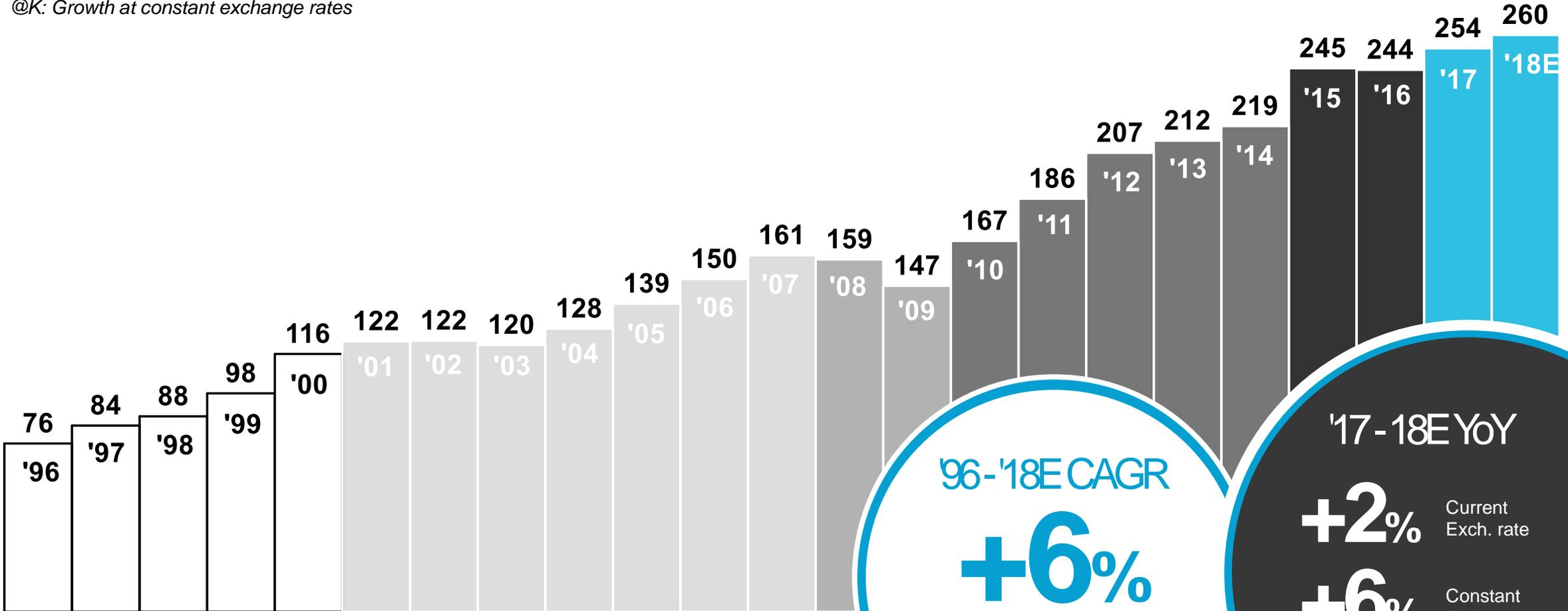
@K: Growth at constant exchange rates



Personal luxury goods market in 2018 confirmed the “new normal” started in 2017



@K: Growth at constant exchange rates



'96-'18E CAGR

+6%

'17-'18E YoY

+2% Current Exch. rate

+6% Constant Exch. rate

Under the surface of a New Normal phase of market growth, Next Gen Luxury is arising



NEW-GENERATION

Chinese Gen Z being the “**segment to watch**”: significant **spending force**, **impulse** buyers, **proud** and **empowered**



POST-OWNERSHIP

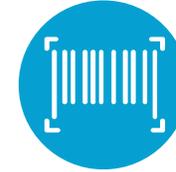
Paradigm shift in consumption favoring **access over ownership** (eg. Rental)

Accelerating 2nd hand market favored by digital players with global scale



AFTER-LIFE

Sustainability, Social responsibility and **Circular fashion** as a new mantra: new vision for the **environment**, for **human** labor and **animal** welfare



BEYOND-PHYSICAL

Digital disrupting the entire luxury **value chain** and asking for a holistic redesign of the entire **technology eco-system**



ABOVE-VOLUME/PRICE

Customer networks as the new and exponential measure of value, beyond product and brand

E-commerce in the retail luxury sector: potential to delight?





IL SALONE
DEI PAGAMENTI
PAYVOLUTION