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RELEVANCY
I started this project as I have a strong fascination for the future and all its possibilities. I noticed that digital technology has become an significant part of our daily lives, both personal and professional. The influence of digital technology is visible everywhere, such as travelling, health care, dating. However in fashion and especially retail, I see that the influence of digital technology is not rising fast enough. There are small changes going on, but there are not really concepts that are created out of a digital approach. This is what I am missing and therefore wanted to research what possibilities there are to keep the physical retail shop alive. To be really innovative and creative I choose to use the year 2025.

With the upcome of digitalization and thus globalization and empowerment of the consumer, shopping behaviour is changing immensely. Flexibility, personalization and fast service is key. Consumers have become much more digital. Online shops are rising as these offer flexibility, vast amount of products and fast service. The physical shops struggle to survive, as they cannot compete. Consumers still desire a tangible experience gained from a physical experience, therefor physical stores won’t disappers. However they do need to step up their game.

Especially with the new consumer around the corner: the digital native. This name is used to indicate people who were born during or after the rise of digital technology. There is more information about the digital native in the next research part of the mini-processbook.

Digitalization is not the only reason retailers are struggling. There is a market shift going on, where consumers either want the best price or a high quality product. This explains the rise of discount brands such as Flying Tiger, Forever 21 and Primark (1) and also the plan to launch a new luxury warehouse in Amsterdam. (2) At the same time brands such as V&D, Mexx and Men at Work are struggling to survive. (3)
MAIN RESEARCH QUESTION

HOW CAN LUXURY FASHION RETAILERS ATTRACT THE DIGITAL NATIVE IN 2025?

SUB-QUESTION 1
Who is the urban digital native at age 15?

Decision-making

The initial sub-question: ‘who is the digital native?’ was too broad and is therefore adjusted to make this research part more specific.

SUB-QUESTION 2
What cultural, social and economic developments can play a significant role in the retail landscape of 2025?

SUB-QUESTION 3
a. What is currently happening in the retail fashion landscape?
b. What are technological retail fashion trends?
SUBQUESTION 1

WHO IS THE URBAN DIGITAL NATIVE AT AGE 15?
INSIGHT

“53% of 16-22 year olds would rather lose their sense of smell than their phone or laptop.” (4)

Conclusion
The digital native as a consumer wants to have much more to say. Today retailers are not flexible enough in fulfilling the need of interaction.

Decision-making
Find a solution for a much more interactive customer experience.
THE DIGITAL NATIVE

FIELD RESEARCH - structured face-to-face interviews with digital natives

Goal: To get insight into this group's use of digital technology, social media and their view on the newest technological developments.

Outcome: The interviews proved that digital natives use a lot of digital technology and digital/social media. However, they are not as aware of how much time they actually spend on their devices and what they do. Also, they were satisfied with the tools they already had and most were not as excited about the latest or future technologies.

DESK RESEARCH - short movie on the need for a mobile phone in 1999 (5)

In 1999, people on the streets were asked if they would need or want a mobile phone. 90% of the people said they did not need one and could not see its advantages. 16 years later, these same people can probably not imagine living without a mobile phone - just like any average person in our society.

Conclusion

The average person often does not see the advantages of a certain product, which later becomes recognizable as something they can't live without.

Decision-making

Combine the outcome of the interviews with trend research and similar examples, to prove that my idea about the future is relevant.
**DESK RESEARCH** - analyzing digital natives through the social media platform Instagram

Goal: To get insight into what their values are, what they like to share with their friends and also figure out the reason why.

Outcome: I got insight on what their values are. Friendship and showing of the best part of your self is important, not only physically but written text of what in life is important to them.

Conclusion

This analysis was relevant for finding their values. However the reason why they do it is not as clear.

Decision-making

Combine this analysis with articles and talking to professionals, to get to a final answer.
**DESK RESEARCH** - short movie on digital natives

Abbey, 5 years old, & Mali are digital natives who are explaining and showing through a direct and funny movie who they are and what they value in life and as a new consumer. (6) This video includes information that is of course not gained from these children themselves, but gained through thorough research. This again proves the conclusion I made before about people not knowing what they might want or need in the future.

**Conclusion**

I am focussing on the 15 year old digital native. But even though the movie is focussed on the younger part of the digital natives, useful information can be used. Such as: friends are important when it comes to decision-making. They want a personalized experience and they want it fast.

**Decision-making**

Find examples of what is said and described about specifically the slightly older digital native.
**DESK RESEARCH** - infographic ‘The Voice of the Active Learner - Education From a Digital Native’s Perspective

This infographic is specified on the digital native as a student and what there wants and needs are within this section. (4)

**Conclusion**

They are used to non-physical spaces; being separate, but together. Also their devices are important to them, they connect with and experience the world through these. Sharing and connection with friends is highly important.

**Decision-making**

Use intimate technology to fully understand the customer and offer an ultimately personalized experience.
What cultural, social and economic developments can play a significant role in the retail landscape of 2025?
INSIGHT

“Flexibility is the characteristic of today’s society.” (3)
Digitalization and the rise of (digital) technology has reinforced flexibility and transparency within our social and professional lives.

Transparency

With the rise of the Internet and the increase of transparency with open networks we gained freedom, but slightly lose our privacy. Typing in something in Google and it already gives you suggestions. More and more things are curated, but at the same time new policies will make it possible to stay more private. (7)
Conclusion

First signs of easy to use virtual experiences for the every day life. Try before you buy 2.0: on + offline intergration.

Mass-production is going to ruin the earth. 3D printing is a great sustainable solution for a better environment.

Lives get more and more curated. This is primarily really useful in this world of information overloard. But if everything is curated, how can we still find things by chance rather than choice?

Decision-making

Find the right balance between identified/ curated data and serendipity/randomness.

This is an example of how precisely something virtual can be applied to real-live environment. Use this development to create precise virtual mirror view.

Use 3D printing and virtual product presentation (rather than an entirely ready to buy collection range) as an essential part of the new shopping experience.
Conclusion

This short movie has inspired me a lot and strengthens my future vision. Use this as a reference to create the new customer experience.
“Today the customer either goes for the true experience or fast service. (...) we see a lot of developments in retail towards a more digitalized physical store. But we do not exactly know where we are going or what it is we are doing yet.”

Decision-making

In 2025 these two elements (fast service & experience) will be combined. Take the online mindset to the brick-and-mortar store.

Conclusion

Fast service and experience are now still to seperates. There a clear first signs, but not work for the consumer yet.
EMPOWERMENT OF THE CONSUMER

One of the results of digitalization is empowerment of the consumer. Access to information has become much more easy to get. Transparency has helped the consumer to become more powerful. Brands can say one thing, but if it isn’t through the consumer will find out, through customer reviews, but also the ability to easily compare prices online or find out how their product is made.

MARKET CHANGE

“The new reality in the shopping street.” (3)

The rise of online shops and the economic crisis are not the only reason that retailers are struggling. The consumer demands have changed and retailers have not anticipated enough on these new demands. Especially mid-market retailers are struggling. Both discount and luxury brands are doing much better; the launch of a new luxurious warehouse in Amsterdam is announced (2), Primark shops are opening in several cities.

“The Rise of Luxury and Discount: Exploring the challenges facing retail’s middle.

Retail may be now more stable since the recession, but there is still limited growth. Discount brands push to be leaders for the bargain hunters, while retailers formerly known as ‘premium’ brands are pushing themselves further upward into the luxury market.” (1)

As concluded earlier in the process, there are several challenges that the retail landscape is facing. The aftermath of the economic crisis, the rise of online shops and the changing demands of the consumer. An economic reasons for that is changing the consumer demands is: the consumer either wanting the best price for a product or high quality. As a result the mid-market brands are struggling the most.
Conclusion
Due to financial changes, consumers either go for discount brands or luxury brands. Mid-market retailers are struggling. In 2025 the mid-market will disappear.

Decision-making
Focus on either luxury brands or discount brands, as the mid-market will no longer exist in 2025.

In 10 years fast fashion is still here. Therefore FOCUS ON LUXURY BRANDS, as they have more potential and are more likely to shift towards slow fashion within a decade.
SUBQUESTION 3

A. WHAT IS CURRENTLY HAPPENING IN THE RETAIL LANDSCAPE?

B. WHAT ARE TECHNOLOGICAL RETAIL FASHION TRENDS?
INSIGHT

“The retailer should become the old butcher from the past, together with new insights and modern technology should become the old butcher around the corner. This way they know exactly what mr. X and mrs. Y want and need and can anticipate on this.” Prikkel de Koopknop, Geert Degrande Press & communication Officer Fun Belgium

“80% of the consumers is prepared to share personal data.” Michiel Mintjes, Orange Valley

Conclusion

Due to mass production and big stores, most retailers lost the personal connection with their customer. Today certain technology can make it possible to get this connection back.

Decision-making

Create an experience that gets back the connection between retailer and customer. Use customer data to realize this.
As concluded earlier in the process, there are several challenges that the retail landscape is facing. An economic reason for that is changing the consumer demands: the consumer either wanting the best price for a product or high quality. As a result, mid-market brands are struggling the most. Further, the rise of online shops is a result of the changing consumer demands.

“So where do mid-market retailers, for that matter, all retailers have to go? In recent years, some shoppers will look online, check reviews, compare prices, and then head to the store to test, touch, try, and buy. This is called web rooming. Other customers will visit stores to test and try, but might go home and make the purchase online. This is called showrooming.

To survive, the physical store must evolve into an effective platform that offers an experience that cannot be replicated online. Only innovators who embrace change, survive.” (1)
Conclusion

Shopping is an emotional activity, therefore the physical shop need to stay. However it is not anticipating enough on the demands of the consumer. Today the consumer no longer sees the on and offline world as two separates, however in the retail landscape the on and offline world haven’t really emerged yet.

Decision-making

For 2025 combine the advantages of both on and offline shopping to create the ultimate phygital experience that combines best of both worlds.
Lecture: Future Retail Concepts  
- Carijn Frijters @ Material Xperience

There are several developments going on in the retail landscape that are the first signs of what retail will look like in the future.

1. personalization  
2. co-creation  
3. fast & flexible service  
4. experience

“if she doesn’t like it, we don’t do it”

Re-branding Hunkemoller is based on the persona Shero (=she hero) to attract a younger audience. Their inner tagline strengthens their customer centralisation.
Conclusion
Today retailers are developing new services that offer a more personal customer experience. However, these developments are still in their infancy and retailers are not moving fast enough.

Decision-making
2025 is all about knowing the customer and offering a personalized experience that fully caters to their wishes.

RETAILER 2015
if she doesn’t like it, we don’t do it

RETAILER 2025
if it is not her personality, we don’t offer it
TECHNOLOGICAL RETAIL DEVELOPMENTS

Virtual shop tour with Google Cardboard (9)  Shopping with Apple Watch (10)
Decision-making

Create a concept where digital technology is a starting point.

If iBeacons are already used today, take this to the next level. At the same time think about some people being sceptic about sharing all their data. Let those be able to not share their data.

Conclusion

There are a lot of developments going on when it comes to technology in retail. However most of these developments are only in their infancy. Retailers are adding tools to their environment instead of making a retail environment that is based on digital technology.

The use of data to improve the customer journey is already done through iBeacon today.
CHASIN INNOVATIVE SHOPPING WALL

Chasin’s concept store in the ‘Negenstraatjes’ is based on an innovative concept that implements digital technology into the shopping experience.

Conclusion

There are clear first signs of combining the on and offline world, but I experienced the concept myself and came to the conclusion that, again, the technology is still in its infancy. The sales assistant also explained that the system doesn’t work fluently yet.

Also there were only few options in terms of suggested outfits. Not all clothing could be viewed on the screens and the customer can’t combine their own items.

Decision-making

For the new retail environment I want to create an experience that is more interactive and personal. The consumer needs to be able to fully create their own style and not pre-set like any other consumer.
“We are searching for optimal connectivity between the physical shop and the web, based on the latest innovations. (...) Create mobile point of sales that make it possible to connect to any cash register system. Say goodbye to the payment desks.”

INTERVIEW WITH HERMAN BERG, SALES MANAGER AT PAY PLAZA

Pay Plaza: the flexible end-to-end solution for global payments.

Conclusion

Mobile point of sales are a point of focus today. Not many retailers are working with it yet, but this will happen soon. It is a online shopping advantage that is taken offline.

Decision-making

Use this information to create an easy and fast purchase method for the future.
IDEA

The fashion industry creates so much waste. At the same time, the fashion industry includes many creatives. Let’s create a great solution to end this problem. Make SLOW fashion fast.
INSIGHT

“Everything that can be automated, will be automated.” Robert Cannon, Internet law & policy expert
I want to create an effective platform that offers a phygital experience to fulfill the desires of the female digital native in 2025.

Today retailers are just like the generation babmyboomers and generation X & Y: digital adapters. As this group has grown up without any or little digital technology they are much slower to adapt to digital tools. They do use it, but it is not yet in their system. Likewise retailers are adding digital technology to the store, but it is not in their concept.

Create an experience that takes place in a physical space, while totally emerged with online services. Fully integrating online services to the brick-and-mortar store.

1. make the physical retailer a digital native

2. make slow fashion fast: create a sustainable environment

3. create a extremely personalized customer experience
Our new customer experience helps the digital native who wants to have a digitalized physical shopping experience by fully adapting the physical environment to fulfill the desires of the D.N cater their needs and have a faster + more sustainable shopping experience.
I want to make an effective platform that offers a phygital experience to fulfill the desires of the female digital native in 2025.

**CONCEPTUAL STARTING POINT**

Integrating online services into a physical environment. Offering a fully personalized & digitalized customer experience.

**END PRODUCT**

Creating a visual, digital report about the new version of retail: the phygital experience.

**WHY?** To inspire and brief retailers, visual merchandisers and interior designers on how to attract the female digital native in the future.

**Conclusion**

The fashion part is missing. How do we buy clothing in 2025? Also how will technology evolve? The concept needs to be worked out much further.

First worked out ideas were already there, but I did not present these yet. I misunderstood what conceptual starting points mean.
Decision-making

Do not only use animation, use photography to make my future vision more clear.
CONCEPT DEVELOPMENT

Decision-making

add an extra step where the customer can actually EXPERIENCE the garment. This is very important that distinguishes a physical shop from an online shop.
Conclusion

This customer is a bit ‘cold’, needs to be more of an emotional experience. Use the human senses. Make sure every step within the journey is based on developments today. Think about what physical objects are still going to be inside the store.

Decision-making

Back-up every step with research. Find the emotional aspect and apply it. This is just a try-out of how to visualize all these steps within the new customer journey. Find out and experiment how to make it much more visually attractive.
moving image (animation) movie/presentation

animation & photography
Decision-making

Find & add more visual inspiration. Experiment with visuals and animation. Watch the movie ‘Her’ again to get a realistic future perspective for the look & feel.

Conclusion

The luxury feeling is not visible and the starting point is not clear enough.
The motion graphic will look like an iPad magazine, where some images are ‘clickable’. Within these images animation is added to visualize and explain the new customer experience.
Decision-making

Make it visually more attractive, fashionable and futuristic. The motion graphic is going to have a voice-over to clarify the story, so do not use a click-able presentation as if it is an iPad magazine.

Find a way to visualize the actual future environment.

Conclusion

It is too much interior. The fashion feeling is missing. Existing images of interior can also make up for a great look & feel of what the environment will look like. However for my future vision it is more difficult.
VISUALIZING THE FUTURE OF FASHION
Conclusion

The 5 other images give clear insight on how I see fashion in 2025. The left upper image does not say much and the one below is too contemporary.

Decision-making

Use these as a basis or tool to visualize my future vision through the end product. Do not use them in the actual end product.
CONCEPT

RETAIL ENVIRONMENT 2025

CONCEPT 1

DIGITALIZING THE LIVING ROOM SHOP

For the ultimate innovative experience create a great contrast between the home feeling in-store and the access to the broad online world.

Make the physical objects digital without them seem to be digital in the first place.
Products are 3D holograms (examples of how to present)

(screenshot) or glass displays as a tool to find the product

Conclusion
The idea is interesting, but distracts from my core vision and goal to digitalize the physical environment.

Decision-making
Kill your darlings! I am super fond of the idea, but the focus should be on the options of 'social' shopping. Create the experience with this as a basis.
CONCEPT 2
SERVICE DESIGN

The screenless shopping displays are a focus within the shop. Present the products elsewhere in the store.

The best selling products are presented through holovision. No personal, but virtual interaction.
Decision-making

Think about how important the waiting area is for friends to wait. Maybe should not put the focus onto it, but do have it there.

Conclusion

This idea fits better with the digital natives, as the acceptance of their peers is important.
Decision-making

Use an online retailer.

why?
To visualize the importance & need for a physical shop. I am choosing to use an online shop to show how much and in what kind of way a retailer really adds up to a shopping experience.
Decision-making

Use a brand to visualize the retail experience.

why?
It gives more structure & adds a fashion feeling. I am struggling with making the end-product look luxurious and more fashionable. When using a brand I can adjust the environment to the brand and it automatically becomes more fashionable.

NOTE TO MYSELF:
Even though the concept is used to express my future vision on luxury fashion retailers in general, I can use a specific brand as a tool to visualize the concept.

It is not from the brands perspective and therefore it does not necessarily need to fit the brand. But rather adjust the concept to the brands look & feel.
**1. NET-A-PORTER**
The luxury fashion online retailer sells womenswear that sells brands such as Burberry Brit, Stella McCartney and Levi's. It has a social focus: recently created their own social network. They came offline once before through window displays.

**2. MYTHERESA**
This luxury online retailer offers womenswear and started out with one multi-brand store, but grew out to become one of the leading online shops. They offer designers brands such as Balenciaga, Saint Laurent and Valentino.

**3. LN-CC**
The evolving online platform compases menswear, womenswear, books and music. it offers pieces from mainline designers as well as upcoming labels.

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**END PRODUCT BRAND RESEARCH**

**Why not use Net-A-Porter?**
It has too many different target groups, which makes it difficult to analyze this and focus on a certain group due to the short amount of time.

**Why not use MyTheresa?**
The brand identity of MyTheresa is not strong enough. It is more difficult to work with a brand that has a quite general look & feel. Also the brand does not fit me personally.

**USE LN-CC**
This online retailer has a strong brand identity that fits me personally. Thus it will function as a good tool to visualize the new customer experience.
Use LN-CC as a tool to visualize the new customer experience online retailer. It shows both the importance of a physical shop and helps me to make the endproduct more fashionable.
Will the retail store survive?

First layout infographic

Retail shops struggle to survive

Online shops pop up like daisies
Conclusion
It does not look luxurious yet. Also it could be more futuristic, the style is too contemporary.

Decision-making
Make it more clean and edgy. Create a fresh look and feel that shows my future perspective.
This moving presentation shows what is happening in both 2015 and my future vision for luxury retail in 2025.
This product gives a small introduction into what kind of brand LN-CC is.
THE DIGITAL NATIVE

Born during or after the rise of digital technology, growing up with digital technology has highly influenced the digital native’s standards and values.

Advanced multitasker who embraces the benefits of sharing information, objects and ideas.

Values advice and experiences of friends, family and peers rather than those of brands.

Crave immediate feedback as the digital native is used to fast service and have easy access to information.

The focus within this project lies on the digital native that is born around the year 2000, the new consumer entering the market in 2025.

"Presenting physical products inside a luxury fashion environment, who does that anymore?" - the luxury fashion retailer of 2025

THE START OF THE FUTURE

Digitalization

“60% of the consumers is prepared to share personal data.” - Michiel Mintjes Orange Valley

Empowerment of the consumer consumers depend on other consumers rather than brands

The rise of online stores as these offer fast service, easy access to information and unlimited product choice

Struggle of mid-market retailers consumers either go for the best price or the high quality of luxury brands

Explanation boards

These give an overview on the core aspects of my project.
FEEDBACK

**Good**

- Bold & convincing choices
- Strong future vision
- Clear & convincing idea
- Excellent use of media!

**To improve**

- Redo the businesscard of the future video
- Show your skills
- Make your concept tactile within the 3D presentation
- Leave out the wooden frames as they do not fit the concept
Decision-making
Show the new experience in the 3D presentation. Make it spacious and clear.

Leave out the extra boards: the info is already in the infographic.

In the businesscard video show something of what I explain.

Change the quote into a catchy title.
NEW PRESENTATION

FIRST IDEA

THE 3D PRINTER AS A BASIC SHAPE

Use the 3D printer as a frame to present the laptop within. It makes the infographic the center of attention.

Think about what a 3D printer looks like in 10 years. It does not look like these.
Decision-making

An element of the new customer journey that is interesting to visualize is the holovision products. Re-create a holovision within your presentation.

Conclusion

The 3D printing in 2025 inside the shop will be done in only seconds. The 3D printing is not the main experience the customer goes through. Therefore do not use this as a starting point for the presentation.
SIMULATION OF THE HOLOVISION IMAGE

Use the holovision to visualize the experience within the new customer journey.
Conclusion

It would be a shame to not make the infographic the center of the presentation.

Decision-making

Present the infographic on the beamer. Adjust the presentation to the beamer.


GRADUATION PROJECT JUNE 2015
AMSTERDAM FASHION INSTITUTE
BY ROBIN VAN DER AA