PREFACE

This mini-process book, explains in short the process made during my AO project at AMFI - Amsterdam Fashion Institute. For a more in-depth explanation extended process books can be consulted.
INTRODUCTION

This mini-process book, is a summary of my process books and explains the process I made, which resulted in my final decisions and end products.

It follows the four graduation phases. It starts with the orientation (phase 1) followed by research and decision-making (phase 2) and ends with actualization and presentation (phase 3).

Because this is a filtered process, this book only shows the most important parts of my process; research, conclusions, decisions and the outcome. If you want to know more or want something clarified, then please consult the original process books for more in-depth information.
PHASE 1

The starting point - orientation
I began my research at the end of last semester and found out that online brands are starting to create longterm brick-and-mortar brand experiences.

I looked at the online fashion industry and especially at one of the biggest players in the field for women: NET-A-PORTER. With this increasing online activity in the luxury market from traditional retailers and especially Style.com, getting an e-commerce site there will be big online competition for NET-A-PORTER.

I want to look further and see how NET-A-PORTER could benefit and how they can respond to this changing luxury market.

**NEXT STEPS**

- Research why online brands are moving offline.
- Research what is happening in the luxury market.
- Research where NET-A-PORTER could service their customer.
ONLINE x OFFLINE

ARTICLE  Why is e-commerce eyeing brick and mortar

KEY INSIGHTS
• More and more e-commerce players are proving that the physical space should not be ignored. (google, Amazon, Warby Parker)
• Brands are testing the waters with pop-up shops. Which is seen as experimentation with physical locations
• These spaces work more as an experience than just a place to buy clothes.

CONCLUSION
Pure-players are moving offline to create an experience which can't be mimicked online rather than a place to just buy clothes.

ARTICLE  Why luxury retailers have finally given into digital

KEY INSIGHTS
• The merge of Yoox and NET-A-PORTER comes amid increased intrest and competition in the online luxury space
• Luxury industry faces slowdown due to lackluster growth in emerging markets
• Companies are looking for opportunities to grow by going online.
• Companies must evolve or face future irrelevance

CONCLUSION
The luxury industry faces a slowdown in growth (in emerging markets) that is why traditional retailers are going online, to expand their brand and looking for growth. This means there will be more competition online.

BOOK  Omni-channel in retail (June 2015)

KEY INSIGHTS
• Online sales of retailers with a physical store are growing 38% faster than pure-players
• Competition grows > it will be more expensive to get visits
• Bigger brands as ASOS and Amazon are well-positioned to survive.
• Offline and online merges

CONCLUSION
As on- and offline are merging, retailers with physical stores are in advantage as they often have a stronger relationship with their customers due to the physical experience.
BOOK  Branding a store - page 349 forecasts

KEY INSIGHTS
• It is the customer that determines how and when they shop.
• One channel retailers will disappear; they do not offer enough convenience and do not meet the customers needs.
• The internet function will be more focused on providing information and inspiration.
• Online retailers will open brick and mortar stores in order to have more brand exposure and communicate more trust.

CONCLUSION
Consumers are in charge about shopping when and how they want to. That is why one-channel retail doesn’t offer enough convenience to the shopper; Brick and mortar offers more brand exposure and communicates more trust.

ANALYSIS  The biggest online luxury fashion retailers and their offline appearances.

Matchesfashion.com - Stores in London  + Townhouse for private shopping

Mytheresa.com - Theresa

Farfetch.com - Browns
**ANALYSIS**

NET-A-PORTER

The ultimate window shopping experience

KARL X NET-A-PORTER pop-up stores

**CONCLUSION**

NET-A-PORTERs direct online competitors are creating/ having longterm physical stores to create more convenience, growth or a stronger relationship with their customer.

**CONCLUSION - ONLINE X OFFLINE**

1. The online marketplace is getting more crowded with 1) traditional retailers moving online due to a lackluster growth in emerging markets, where everyone was focused on, 2) growing rival e-commerce sites and 3) brands like www.style.com getting their own online business.

2. Omni-channel retailers are doing better in sales as they have created an experience, which can’t be mimicked online. They offer more convenience and have a stronger relationship with their customer.

3. NET-A-PORTERs competitors are working on/ having omni-channel retail strategies for extra service and/ or growth. NET-A-PORTER is lacking behind.

4. NET-A-PORTER has already tried the physical world with temporary stores, which was received positive by the customers. This is a good start towards long-term commitments to brick-and-mortar stores.

An offline NET-A-PORTER experience must be innovative and service-oriented. It must bridge the devide between online and offline.
THE LUXURY MARKET

“The luxury market is driven by touristic spending.”
- Global luxury study 2014/2015, Bain and company

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CONCLUSION - THE LUXURY MARKET
The luxury market is driven by touristic spending with travel retail being one of the fastest growing markets in the luxury industry worth $120 billion in 2020.
NET-A-PORTER x TRAVEL x TARGET GROUP

SITE  Virgin atlantic + NET-A-PORTER.com

KEY INSIGHTS
• NET-A-PORTER has had personal shoppers at the London Heathrow clubhouse. This was a collaboration between Virgin Atlantic and NET-A-PORTER.
• There is the standard (hotel) helicopter that delivers packages to the Hamptons for NET-A-PORTER, to serve their traveling customer.
• NET-A-PORTER has done 2 collaborations with hotels to offer personal shopping from the hotel room, in West house hotel and the Bridgehampton.

CONCLUSION
NET-A-PORTER want their customer to be able to shop even when their not at home but when traveling by delivering extra services as personal shopping and delivery per helicopter. NET-A-PORTER has made use of the travel world already, including collaborations with hotels and airline and called it home away from home.
KEY INSIGHTS
• NET-A-PORTER created in collaboration with the Peninsula hotels city guides from cities all over the world.
• The EDIT, the weekly online magazine, has a section with favorite places and places to go to around the world. The nice part is that they combine this with outfits you could wear.
• Next to fashion, important pillars of Porter magazine are beauty, art, culture, travel.

CONCLUSION
The content NET-A-PORTER infuses in their magazines and online are fashion, beauty, culture and travel. Travel sections combine places to go to, with suggestions on what to wear/ pack and is a valued part of their content by the consumer (customer insights 1.4) and the brand.
MEDIA KIT  NET-A-PORTER Target group

## THE AUDIENCE

<table>
<thead>
<tr>
<th>Average age of the NET-A-PORTER customer</th>
<th>Household Income</th>
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<tbody>
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<td>38</td>
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Influential and highly connected

### INSTA

Average amount of likes on NET-A-PORTER’s Instagram post per subject

- **Fashion**: ~5000
- **Beauty**: ~3000
- **Travel**: ~10,000

### CONCLUSION

The NET-A-PORTER customer is a traveler. She lives all over the place and travels on average 11 times a year. The most liked Instagram feed is travel-related as well.
CONCLUSION

Their passion for travel is proved by their Instagram profiles, which is their favourite type of social media due to the fashionable aspect of this medium.

* For more target group profiles look in extended process books.

CONCLUSION - NET-A-PORTER x TRAVEL x TARGET GROUP

NET-A-PORTER tries to target their customer already whilst traveling through multiple collaborations with luxury hotels and Virgin Airlines as they know they care about luxury travel which they do 11 times a year on average.
THE LINK

EXTERNAL
Travel retail is one of the fastest growing sections of the luxury market ($120 billion in 2020).

INTERNAL
NET-A-PORTER’s target group travels 11 times a year + is very interested in luxury travels. + NET-A-PORTER already tries to target her while traveling.

MAIN RESEARCH QUESTIONS

HOW CAN NET-A-PORTER\textsuperscript{1} \textbf{BENEFIT} \textsuperscript{3} FROM THE FAST GROWING LUXURY MARKET, \textsuperscript{2} TRAVEL RETAIL?

SUB CATEGORIES TO RESEARCH

\begin{itemize}
  \item \textsuperscript{1} NET-A-PORTER
  \item \textsuperscript{2} The luxury market/ travel retail
  \item \textsuperscript{3} The benefit
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SOCIETY BUSINESS ART & DESIGN

FASHION MEDIA

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2. The luxury market/ travel retail
3. The benefit
PHASE 2

Research and decision making
CHAPTERS

• 2.1 NET-A-PORTER
• 2.2 THE LUXURY MARKET
• 2.3 HOW TO BENEFIT
2.1 NET-A-PORTER

Why should NET-A-PORTER benefit from the growing luxury market; travel retail?

NET-A-PORTER

BRAND IDENTITY PRISM

PHYSIQUE
- Black and white
- Technology-driven
- Content and commerce (magazine-style)

RELATIONSHIP
- Excellent service
- Effortless and ease
- Anytime, anywhere, any platform

REFLECTION
- Style-savvy and powerful affluent woman

PERSONALITY
- Leader
- Innovative
- Smart
- Sophisticated
- Feminine

CULTURE
- Luxury
- Global
- Innovation
- Inspiration
- Collaboration

SELF-IMAGE
- Fashionable
- Independent
- Confident
“We’ve been known for digital innovation, because that is where we started, but really we’ve been focusing on content and commerce in the fashion space and the media we’ve first played with, digital, was the biggest opportunity in 2000.”

Natalie Massenet - Founder

CONCLUSION
NET-A-PORTER is focusing on content and commerce and is always looking for the biggest opportunity at that moment in time. So NET-A-PORTER is not only about technological innovation, it is about the biggest opportunity.

FUTURE GOALS
1. NET-A-PORTER wants to stay the leading destination for content and commerce.
2. YOOX NET-A-PORTER group will be focusing on mobile.
3. The NET-A-PORTER Group will be focusing on expanding its three brands in all its key markets.
Media Kit Net-a-Porter

Conclusion

Net-a-Porter has a global focus, speaking to 6 million women each month, and wants to be available anytime, anywhere and any platform in order to speak to women worldwide. They want to inspire the customer, that is why the mix of content and commerce is so important.
NET-A-PORTER is the online luxury retailer who focuses on inspiring the customer with editorial content, more than all other brands are doing. The service level of NET-A-PORTER compared to the other brands is very high although Matches, with their private townhouse for personal shopping just adds a bit more service towards their customer.

All are digital brands but are not working with innovative technologies. This means that the technological innovation NET-A-PORTER is using within their brand as the live tracking of what people are buying, scanning Porter magazine and their app is unique for online luxury retailers.
CONCLUSION

Every website talks about Fashion and Accessories, whereas beauty and travel are only talked about by Matches and NET-A-PORTER. NET-A-PORTER has already taken a step further with beauty as they sell beauty products as well.

The least talked about subjects by competitors are beauty and travel.

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<tr>
<th>CONTENT on website</th>
<th>GIFTS</th>
<th>SPORTS</th>
<th>TRAVEL</th>
<th>CULTURE</th>
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VISUAL IDENTITY

THE WEBSITE NET-A-PORTER.COM

CONCLUSION

The online magazine, has also the lay-out of a classical magazine. It has headers, an intro and text, complemented with images, very commercial.

Signature colors are black and white just as the packaging.
CONCLUSION

- Luxury high fashion editorials; High end poses
- Mostly woman, portrayed alone as powerful and independent (heads up and relaxed)
- Feminine and elegant
- Subtle color use > luxury feel
- Focus is on fashion and on the women
- Almost no use of props, only in background
BRAND IDENTITY

Although NET-A-PORTER may be known for their digital innovation their focus is on fusing content and commerce and are always looking for the biggest and innovative opportunities. NET-A-PORTER wants to lead and not follow, they want to set the standard with innovative ideas and technology.

With their focus on global expansion, they want to be available anytime, anywhere, any platform. They monitor what the economy is doing and adapt to new booming markets. All brand extra’s are created for growth.

They want to make the world more stylish through innovative technology, smartest product, exceptional service and original creative content.

With their world-class editorial content on fashion, beauty, travel and culture they want to inspire the NET-A-PORTER customer. This together with digital technology should make the shopping experience easy and effortless.

VISUAL IDENTITY

WEBSITE
The branding of the website is black and white. Then the editorials of the magazines bring in some color. It is straight, to bring in some structure however there is no background and it is all quite clean, only showing the products in the e-commerce section.

PACKAGING
Signature black with white details packaging; as if you open a present. Black is being used for luxury often.

OFFICES
The offices are created to have one overall brand feel and must breath the brand NET-A-PORTER, hence the black and white color scheme. It has virtual, classical and monochromatic themes to fit the technology and luxury fashion aspect of NET-A-PORTER. The space is very transparent with a lot of glass and open spaces which are decorated with leather couches and chandeliers to give it that luxury feel.

THE MAGAZINES
Classical commercial magazine-style with high-end fashion editorials. These editorials are feminine and elegant, have a focus on the fashion and the powerful woman who is wearing it, is the center of attention. There is a subtle color use, no screaming colours and a minimum use of props.

COLORS

| Black | White |
SHE - internal target group

PODCAST APPLE, NATALIE MASSENET

KEY INSIGHTS
• Time-poor cash-rich fashion consumer and an aspirational fashion consumer.

CONCLUSION
The target customer is internally known as She. She is just like Natalie Massenet (founder) and Alison Loehnis (President) around 38 years old, time-poor and cash-rich. She travels often for leisure, fashion forward, she wants it first and lives all over the place. There is a big aspirational group as well.

MEDIA KIT NET-A-PORTER

The world’s premier online luxury fashion destination
NET-A-PORTER speaks to 6 million women each month
38
Average age of the NET-A-PORTER customer

£170,000
Household Income

£22,000
Average annual spend on fashion

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NET-A-PORTER TARGETS: “SHE”
• Time-poor
• Cash rich
• Style-savvy
• 22,000 pound annual spend on fashion
• CEO, senior executive, lawyer, medical practitioner or media/ fashion director
• Driven by US and UK market
• Travels 11 times a year
• Influential and highly connected
THE BUSINESS WOMEN
• Entrepreneur/ Lawyer/ Business consultant
• Biggest group; Buys everything from clothing to gifts.

“THE CREATIVE”
• Fashion editor/ Photographer/ Copywriter
• Buys everything more due to the quality and passion for design and brands.

“THE AFFLUENT STUDENT”
• Still in university.
• Buys mainly beauty and accessories and reads the content. Aspirational.
MOST NAMED REASONS FOR BUYING AT NET-A-PORTER

Product offer

Excellent customer service

Differente to local offer/ More exclusive

New and exciting items

Fast delivery

Free shipping

Easy return policy

SHE x TRAVEL Instagram interviews

I asked customers on Instagram if they wanted to help me graduate by answering some questions. This is where insightful outcomes:

KEY INSIGHTS

- On average SHE browses quickly through the stores and goes to the lounge after.
- SHE likes it when the products she buys have a story or are unique.
- SHE thinks the product range for fashion at the airport is very limited and the stores are not so inspiring as it is always the same duty free shops.
- SHE doesn’t want to carry much extra.
SHE - target group

The target group NET-A-PORTER is aiming for is “SHE”. She has a good job as f.e. CEO, senior executive, lawyer, medical practitioner or media/fashion director and is cash-rich but time poor. She has a high income and spending power that is why she spends on average 22000 pound on fashion and travels 11 times a year.

However, most women who actually buy at NET-A-PORTER are a bit less affluent. They are real business women or working in the creative field. They are ambitious and some are starting their own businesses. Also affluent students buy sometimes at NET-A-PORTER, they really aspire the brand.

Although the N-A-P customer lives all over the world, it is dominated by the Uk and US market. Although their style may be very different, they all are very fashionable and style-savvy. They love to get inspired via technology on fashion, travel and beauty. They also read magazines as Vogue and NET-A-PORTER’s own Porter. Furthermore they love good food, not necessarily healthy, whilst going out for dinner or brunch with friends. They travel often; around 6-8 times a year; for business, on city trips or on luxury vacations.

She doesn’t like to spend much time at the airport. She often browses quickly through the stores but she finds the product offer for fashion quite uninspiring. After the quick shopping session she goes to the lounge, gets a coffee and checks her email and Instagram.
2.2 LUXURY MARKET

What is happening in the luxury market?

THE LUXURY MARKET - OVERALL

CONFERENCE  Future Shopping 08-10-15

“Most vitality will be seen where the old and the new connects - the digital and physical.”

Desiree Struyk - Senta - Road to Prosperity

CONCLUSION

There is a place for both online and offline in the future. A combination of the two will be most profitable.
ARTICLE  Luxury web battle looms as LVMH, Hugo Boss develop e-commerce

KEY INSIGHTS
• As department stores (Neiman Marcus, Galleries Lafayette) and publishers (style.com) join the ranks of those offering luxury goods online. There is a new breed of competitor:
• This shift is making the internet look more like the real world
• Department stores have seen their share of luxury sales erode as brands opened outlets from Beijing to Bogota.
• Same dynamic is starting to play out online. LVMH and Hugo Boss are shifting more resources to e-commerce as growth in China Slows.
• 9% of luxury sales will take place online by the end of the decade. More shoppers turn to mobile devices to browse and buy. They have the flexibility to order how and where they want.
• Luxury brand will likely to continue via third-party websites, to help reach customers who wouldn't necessarily come to their outlets.
• The big gorillas are entering into our space, if you want to play in that field, you want to have size.” (Richemont about amazon.com)

CONCLUSIONS
• The competition online in the luxury market is increasing as growth in China slows. This is making the internet look more like the real world.
• The customer has the power to shop where and how they want to, so brands need to be everywhere, on and offline.

REPORT  Global powers of luxury goods (Deloitte 2015)

KEY INSIGHTS
• The ever sophisticated luxury consumer is increasingly digitally-savvy, time-sensitive, and socially aware.
• Luxury industry is a digital “latecomer” as they wanted to protect brand heritage and exclusivity.
• All content must be seamlessly available across multiple platforms
• As digital engagement of brands rises, online sales will also increase. However, traditional brick-and-mortar stores remain extremely important to the luxury industry.
• There is not likely to be a slowdown in foreign travel; not only does travel provide the experience of seeing a new culture, it also offers the ability to buy unique and one-of-a-kind luxury items. Travelers can return home with both an invaluable story about their trip and status through their purchase of products unavailable in home markets.
• Luxury spend while traveling counts for 37% of the market in 2013.

CONCLUSIONS
• Luxury brands moving online will lead to less exclusivity due to more global accessibility.
• Traditional brick and mortar stores remain extremely important even though online sales are rising, as the biggest amount of purchases is still being made in store.
• There will not be a slowdown in foreign travel. Consumers buy unique and one of a kind luxury products whilst traveling.
KEY INSIGHTS
• International tourism and a stronger middle class are shaping luxury trends, luxury experiences and alternative luxury channels.
• Slower but steady. Slower but more sustainable long term growth.
• All markets are strongly driven by touristic spending except the Chinese, Japanese and South American market.
• Luxury accessories 29% of the market, growth of high-end shoes surpassed that of leather goods.
• Retail channel is growing > weighting 30% of the market.
• Consumers are on the hunt for greater luxury value for their money.

CONCLUSIONS
• Almost all markets are strongly driven by touristic spending so again the traveler plays an important role in the luxury market.
• Consumers are on the hunt for greater luxury value for their money. Therefore there is much to achieve, with e.g. experiences and exclusive products product.
• The US is by far the largest market in luxury goods.
1 LUXURY MARKET

Driven by touristic spending

2 LUXURY BRANDS

Are finally going online due to lackluster growth in emerging markets

1. Less exclusivity
2. More competition online

3 LUXURY CONSUMER

Greater luxury value for their money - something unique

Need for development

- Personalized service
- Guidance
- Being educated/informed

- New markets
- Exploiting new channels
- Innovative new product categories
1. The luxury market is driven by touristic spending, that is why it is interesting to look further into travel retail and travelers spending. With the US (NY) as the biggest market for luxury goods, by far.

2. Luxury brands moving online means that there will be more of the same product online, this means less exclusivity. There will probably be a counter reaction from people who want exclusive and unique luxury products.

3. The luxury consumer wants greater value for their money, either in experience, service and/or product.

4. Traditional brick-and-mortar stores remain extremely important even though online sales are rising. The biggest amount of purchases is still being made in store. A combination of online and brick-and-mortar will be most profitable and serves the customers needs thus they can decide where and when they want to shop.
TRAVEL RETAIL

DEFINITION
Travel retail

TRAVEL RETAIL = retail outlets within travel environments

RETAIL AT AIRPORTS (65% of travel retail)

RETAIL AT CRUISES, FERRIES

DOWNTOWN DUTY FREE STORES

BORDER SHOPS

CONFERENCE  Future Shopping 08-10-15

“We see that customers are more interested in luxury and experiences, that is why the retail at schiphol is slowly morphing into luxury experiences, to offer the customer something extra whilst waiting for their flight to depart.” “I definitely think NET-A-PORTER and airports would be a good match”

Maryan Brouwer - Schiphol Retail

CONCLUSION
There is place and a need for luxury experiences at airports. NET-A-PORTER with their traveling customers would be a good fit.
ARTICLE  Tapping travelers beyond traditional corridors

KEY INSIGHTS
• Travel retail is worth about 15% of the broader luxury goods market.
• China accounts for 27% of total market, Russia for 15%, Indonesia 4%. The GDP per capita starts to rise and people have more disposable income, they want to travel + shop.
• For 82% of the Chinese travelers, shopping is their number 1 priority when traveling, followed by 56% Middle eastern countries and 48% of Russian.
• The square footage that has been dedicated to retail has made the airports a lot bigger + more luxurious
• Retail spending:  
<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2016</th>
</tr>
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<tbody>
<tr>
<td>ASIA</td>
<td>$12.2 bill</td>
<td>$32.2 bill</td>
</tr>
<tr>
<td>EUROPE</td>
<td>$10.6 bill</td>
<td>$12.4 bill</td>
</tr>
<tr>
<td>AMERICAS</td>
<td>$ 7 bill</td>
<td>$10.1 bill</td>
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</tbody>
</table>
• Market leaders are not only targeting new consumers + new geographies but also expanding focus from traditional travel corridors to travelers.
• Travel retail: Defines retail outlets located within travel environments has evolved to ‘traveler retail’. Travelers do not shop only at airports, shop everywhere, especially on the high street.

CONCLUSIONS
• Markets where GDP per capita starts to rise and have more disposable income are the leaders within travel retail (China, China, Indonesia)
• Market leaders are not only targeting new consumers + new geographies but also expanding focus from traditional travel corridors to travelers (high-street). Retail spending and the amount of travelers is growing as it gets easier to travel for everyone around the world.

ARTICLE  Luxury brands step up battle for traveling shoppers

KEY INSIGHTS
• Luxury brands are opening more outlets at airports tapping into one of the fastest growing sections of the luxury market that is set to keep booming.
• “Customers are spending time in airports where the environment has become increasingly sophisticated” Chairman of Chanel’s fashion business
• Channel affects more customers interested in luxury
• Perfume and cosmetics, biggest product category for travel retail 28% wines and spirits 18%, Fashion and accessories 13.5% Watches and jewelry 12.2%

CONCLUSION
Travel is set to keep booming. As tourists are spending and make up for a big part of the global luxury spending, luxury brands are opening more outlets at airports and cruise ships. Therefore the environment has become more sophisticated. People who travel have on average more to spend which makes it interesting for the luxury retailers.
ARTICLE  Airport retail flying high

KEY INSIGHTS
• Once a rarely discussed side-line business now a highly, lucrative luxury strategy
• There is a captive audience who is bored and looking for diversion others are buoyed by the start of a leisure trip.
• It marks the start of a holiday
• In 2020 the travel retail and duty-free market is expected to be worth $120 billion.
• It is seen as a platform to launch a brand to the world.
• By digitizing product displays retailers may soon be able to more rapidly/efficiently adjust their merchandising strategies.
• Once there is a burgeoning middle-class with the prosperity to travel, who don’t have access to a lot of brands, there is an opportunity to sell huge quantities of your best products.
• Flights get cheaper which means that the consumer has more spending power

CONCLUSIONS
• Travel retail is a highly lucrative strategy for luxury retailers as the luxury customer is often bored and in the mood to spend as a mark to start of their holiday.
• Airport sales can deliver a brand a lot of data, that is why luxury brands use it to be seen as a platform to launch their brand to the world and see where to open next.
• Once there is a burgeoning middle-class with the prosperity to travel, who don’t have access to a lot of brands, there is an opportunity to sell huge quantities of your best products.

ARTICLE  The sixth continent

KEY INSIGHTS
• Once a way for passengers to load up on cheap booze and cigarettes, now a big part of many brands’ strategies and of airports’ revenues.
• Catching people in the golden hour is a data paradise.
• Sales at airports will grow by 73% from 2013 to 2019
• Income of airports has been squeezed by regulators and budget airlines as landing fees and passenger charges. That is why they are boosting “non-aeronautical income.”
• A chance to show off to people who may become their best customers when they return home

CONCLUSIONS
• Travel retail has shifted from cheap booze and cigarettes, to a strategy for many brands. This data-paradise is a growing market as airports are boosting non-aeronautical income and travel is increasing it is becoming very sophisticated.
• It is the perfect place to show who you are as a brand to potential new customers.
KEY INSIGHTS

• Travelers account for 40% of global spending on personal luxury goods with 12-13% through travel retail.
• LVMH is the only luxury player with significant direct operations in travel retail.
• Salvatore Ferragamo is most exposed with 138 locations. Hermès second with 60 locations.
• Travel retail grows faster than the broader luxury goods market.
• It is sensitive to foreign exchange rates and exogenous shocks (terrorism, health scares, financial crises).
• Growing importance of emerging market travelers in Asia and Latin America. Emerging market nationalities are biggest spenders per passenger.

CONCLUSIONS

• Travel retail (60% airport malls but also includes ferries/cruises, border shops and downtown duty free and tax-free shops) is one of the fastest growing sections of the market which makes it an interesting opportunity for luxury brands. However, this business is sensitive to foreign exchange rates and exogenous shocks.
• Emerging market nationalities are biggest spenders per passenger.

TRAVEL RETAIL

Tourists are spending and make up for 40% of the global luxury spending. Luxury brands are anticipating on this and have seen that there is business within this travel retail segment. That is why travel retail is becoming more sophisticated and is shifting from cheap booze and cigarettes to luxury goods.

There is a slowdown in the emerging markets’ economies, however they are spending while traveling. Markets where GDP per capita starts to rise and people have more disposable income are the biggest spenders, (China, Russia, Indonesia) as prices are often lower and the product ranges are bigger when they are overseas.

Airport sales are worth 60% of travel retail. Luxury brands use this location for data, and to be seen as a platform to launch their brand to the world and to potential customers. People are captive, and thus easier to target. They are often bored and in the mood to spend on luxury to treat themselves.

Travel is set to keep booming and is expected to be cheaper in the future. This means that there will be more money left to spend on goods. Travel retail is expected to grow by almost 50% to a $120 billion business in 2020. This means that travel retail is no longer a rarely discussed side-business anymore it is a highly lucrative strategy for luxury retailers, which will be more and more sophisticated every year.
The luxury market

Is driven by touristic spending

Travel Retail is morphing from souvenirs to luxury goods and experiences

Travel Retail is expected to be worth $120 billion in 2020

Luxury brands

Are finally moving online

More online competition

Online retailers move offline with longterm experiences/ stores, as the shopper decides on how and where they want to shop

Online and offline are slowly merging into one
KEY TRENDS

RETAIL TRENDS

putting customers first
search for differentiation

TRAVEL RETAIL

RETAIL IN GENERAL

localisation of product
aspiration
value
exclusivity
price
experience

collaboration

collaboration

collaboration

co-creation
search for differentiation

rationale is more than selling
engages more deeply
very visual and stimulates browsing

curated commerce
pick-up points
showroom

different retail models

more interaction
service

charging phones
personal shopping
sit and watch
multilingual
home delivery
pre-ordering

KEY TRENDS
MAIN TRENDS

Differentiation through collaboration
Adding value through exclusivity and experience
Interaction
Convenience
Technology
Personalization
2.3 HOW TO BENEFIT

Linking all key insights and conclusions to create conceptual starting points.

LINKING RESEARCH

As NET-A-PORTER wants to focus on a broad expansion, the travel retail concept must stand for what NET-A-PORTER is and does. This can be accomplished by using its mission; making the world more stylish through innovative technology, original creative content, exceptional service and the smartest product.

As retail is used to strengthen the relationship with the customer; the experience must attract the whole target group “SHE”.

page 40
Key insight + Key insight leads to conceptual starting points

INSIGHTS BASED ON

NET-A-PORTER
SHE
TRENDS

Uses state-of-the-art technology + Technology, in-store + mobile + payment = Technology must be a vital part of the retail concept.

Focus on mobile + Interaction + convenience = The travel retail concept must be connected with the NET-A-PORTER app.

Original creative content / Magazine-style + Curated commerce = The product range must be based on themes including both content and commerce.

Content and commerce + Finds travel retail now quite uninspiring = Must make the pre-boarding (shopping) experience more convenient and inspiring.

Collaboration + Likes to buy unique products / wi/ story = There must be products which have added value through exclusivity this can be achieved by collaborations.

Adding value through exclusivity + Collaboration = Technology must be used to inspire the customer.

Uses technology to be inspired.

TRANSFORM INTO CONCEPTUAL STARTING POINTS
CONCEPTUAL STARTING POINTS

OVERALL
• Making the world more stylish through innovative technology, original creative content, exceptional service and the smartest product.
• Serving the current and attracting the potential customer.
• Must make the pre-boarding (shopping) experience more convenient and inspiring for her.

LOOK AND FEEL
• Making use of the signature black & white branding color scheme.

LOCATION
• Location(one of N-A-P) key markets; The US, The UK, Australia and/or France.

1) INNOVATIVE TECHNOLOGY
• The customer uses technology to be up to date about trends and uses it for inspiration on fashion, beauty and travel. NET-A-PORTER is on the forefront of digital technology. The shopping experience trend is to be more interactive and convenient, that is why the travel retail concept must inspire and use technology.

2) ORIGINAL CREATIVE CONTENT
• Building on the strength of the magazine style of NET-A-PORTER and the curated commerce trend, the product range must be based on themes - including both content and commerce. (Not the dull duty-free type of lay-out per brand)

3) EXCEPTIONAL SERVICE
• NET-A-PORTER differentiates online by using state-of-the-art technology. This together with the rise of new in-store technologies, leads to the fact that technology must be a vital part of the travel retail concept to make the experience indeed more convenient and services as quickly as possible. (in-store/ payment).

4) SMARTEST PRODUCT
• Building on the insight that the traveling SHE buys products that are unique, there must be products which have added value through exclusivity. This can be achieved by collaborations, which NET-A-PORTER does more often.
PHASE 3

Actualization and presentation
CHAPTERS

• 3.1 CONCEPT DEVELOPMENT
• 3.2 LOOK AND FEEL
• 3.3 STORE DESIGN
• 3.4 PILOT LOCATION
• 3.5 ARCHITECT
• 3.6 PRODUCT/PRESENTATION
3.1 CONCEPT DEVELOPMENT

How I came to the final concept.

CONCEPT IDEAS

1. URBAN OASIS

* A place that is often more beautiful, more inspiring and more pleasant than real life.
* The URBAN OASIS generates a tranquil bliss that extends the carefree holiday feel.
  * Elongating the carefree holiday feel
    > what is happening in the store? You need to know this before starting to design

2. VACATION SHOP

* Sell luxury resort wear.
  > Looking back at the conceptual starting points it needs to breath NET-A-PORTER. In order to strengthen the relationship with the current customer and let new customers meet the brand.

3. CONNECTING COUNTERPARTS

* Nowadays, most characteristics are slowly blending, just like online and offline are slowly fusing into one.
* Luxury store and lounge
  > Making it more of an experience, and work more with the technology. It can be more bombastic as NET-A-PORTER is on the forefront of digital innovation. They can drink in the lounge which is complementary, that is why I let this go, and stay closer to NET-A-PORTER and choose for something NET-A-PORTER would choose and is their expertise; Technology.

4. THE ULTIMATE FASHION DESTINATION

* NET-A-PORTER calls itself “The world’s premier online luxury fashion destination”
* The shoppers at the airport are all going to different destinations. What if the shopper can choose her destination, is there via virtual reality, and get a selection of/ choose from a collection that fits that place. This would be the ultimate destination.
STARTING POINT
• Evolving the world’s premier online luxury fashion destination into the ultimate fashion destination.
• NET-A-PORTER’s magazine-style + edited range + continue shopping online. Fusing online and offline.
• NET-A-PORTER uses state-of-the-art technology
• Customer uses technology to get inspired

CONCEPT TEXT
The NET-A-PORTER ultimate fashion destination is a luxurious experience where every destination becomes a fashionable escape by mixing content with commerce.

State-of-the-art technology takes the customer on a digital journey and provides her with fashion suggestions and must-go places for her chosen destination. This fashionable guide, that prepares her for the perfect luxury escape through a bespoke experience, personalized to the wishes, interest and destination of the customer, will enrich her travels.

The environment fuses online and offline to provide her with an inspiring and fashionable surrounding influenced by the magazine-style of NET-A-PORTER. Next to selling an edited range and providing a digital catalogue that is endless, the environment inspires as much as NET-A-PORTER.com does with the newest fashionable products and editorial content.

FINAL CONCEPT
Travel + Digital innovations, Bringing her to the destination: The ultimate fashion destination.
Destinations above, St. Tropez, Chile and Dubai have been featured in NET-A-PORTER’s online magazine. They already have a lot of content, thus easy to reuse for a big data base.
3.2 LOOK AND FEEL

*Overall look and feel, form, material, color and lighting.*

---

OVERALL LOOK AND FEEL

Translating NET-A-PORTER into a physical expression.

- needs to *breath* NET-A-PORTER
- needs to have a global appeal to attract a global audience
- needs to connect counterparts: hard and soft, organic with rigid

---

OVERALL VALUES

Feminine strength
Sophisticated gloss
Polished luxury
FORM

Corporate branding

CONCLUSION
• Rigid
• Rectangular
• Structured
• Stiff

KEY WORDS
• Feminine shapes
• Elegance
• Central composition
• Focused on Female

Editorials

FINAL FORM

Mixing rigid forms with feminine shapes, that gives a worldly feel to attract a global audience.
COLOR

THE WHOLE WORLD AS WE EXPERIENCE VISUALLY, COMES TO US THROUGH THE REALM OF COLOUR

Hans Hofmann

NET-A-PORTER SIGNATURE COLORS

CONCLUSION

Only black and white would look very sterile and clean, which NET-A-PORTER is not. As they also work on that content level, they use soft and subtle colors in their editorials, which makes it more luxurious and warm.
Monochromatic black and white with a golden touch.

NET-A-PORTER Editorials
Colors based on ‘Luxury’ Meaning

FINAL COLOR PALETTE

Monochromatic black and white with a golden touch.
CONCLUSION
Mixing refined soft-shell, with reflecting hard-shell materials.

FINAL LUXURY MATERIALS
Clear glass, soft suede, black tinted mirrored glass, polished brass
LIGHTING

CONCLUSION
As the retail environment is focused on women, it would be good if there is warm lighting as women would experience this as something positive.

FINAL LIGHTING
Warm tinted light bundles, that highlight the exclusive products.
3.3 STORE DESIGN

Floorplan, fixtures, final design

OVERALL - field research

1. Paths should be wide and easy accessible with small trolley.
2. Product should be clearly presented, not to crowded, so people walk in more easily when in a hurry or stressed. (this is NAP's style + oasis feel as well)
3. Better if store doesn’t have shop windows, rather want it to be open, so people can walk in easily. (attracts a larger audience, what we want to achieve at airport retail, letting people meet the brand)
4. Exclusive items work well, and will sell as they often buy impulsively and it is not available anywhere else.
5. Products must be clearly presented as they often walk by quickly, and if they see something they like they walk in quickly.
6. Logo must be clearly presented above the counter.
7. Products should be presented in spot lights, to emphasize the exclusivity of the product.

FIELD RESEARCH
Burberry and Hermes at Schiphol Airport
Fixtures

Inspired by form: mixing linear forms with organic shapes.

Products must be clearly presented, as the shop will not have a shop window.

Consult extended process books for more sketches.
FLOORPLAN - STORE DESIGN

- fitting rooms
- brass organic rack
- adaptable wall presentation
- stock room
- brass polished counter
- presentation table
- digital wall

FINAL STORE DESIGN
MUST GO PLACES, just as in the online magazine.

Choosing her destination, will get her in the holiday mood even more. Every destination will have a different setting + different suggestions, destinations are posh ski environments in different countries.

4 was the advised number of choices said the VM of Hunkemoller at the future of retail conference.
St. Moritz is one of the world's most famous holiday resorts. Chic, elegant and exclusive with a cosmopolitan ambiance, it is located at 1856 metres above sea level, making it one of the world’s highest ski resorts.

Example of what information is provided on the map.

The pop-up screen gives an interactive feel.
As exclusive products do well at airports, which leads to impulse buying. It will be a good idea to have the exclusive product lines physically in store. One collaboration at a time. The ultimate luxury product.
3.4 PILOT LOCATION

Where the stores should be located.

STARTING POINT

• NET-A-PORTER wants to focus on expanding in its key markets, that is why it is advised to have the travel retail concept located in (one of NET-A-PORTERs) key markets: The US, The UK, Australia and/or France.

LOCATION

COMPARING MAIN AIRPORTS AND IT’S SHOPS

KEY INSIGHTS

• France only has French mono brands
• New York doesn’t really have high-end luxury boutiques at the airport yet.
• Heathrow has quite a lot of luxury stores as well as department store Harrods.
• LA has started with Hermes, Gucci and Burberry.
• Hong Kong only has mono brands, all western companies.
• Beijing is more directed towards men.
• Atlanta shops are a bit lower than the luxury high end however this is an airport where people have to transfer and had the most passengers in 2014 according to airport council international. So could be interesting as well.

CONCLUSION

New York JFK doesn’t have luxury stores yet which is remarkable as it is one of the biggest markets for luxury goods. Brands can speak to New Yorkers, travelers and business women who all have money to spend.
**KEY INSIGHTS**

- New York is the biggest city for the luxury market. Followed by Paris and London.
- London, New York and Paris are the favorite destinations of SHE. *(see research phase 2)*

**CONCLUSION**

New York is the destination for luxury goods, however at the airport there is not much luxury yet. There is an opportunity here.
KEY INSIGHTS
DELTA Airlines, one of the biggest airlines flying to JFK, has renewed terminal 4. This has led to the fact that it is the biggest terminal and most suitable for a new luxury shop.

CONCLUSION
TERMINAL 4 would be most interesting for NET-A-PORTER as it is the biggest terminal with space for luxury retail. It also serves a lot of interesting Airlines as DELTA, Virgin, KLM, Singapore Airlines, Emirates, Etihad, Jet Airways, and SWISS Airlines.

FINAL LOCATION
Although New York is the destination for luxury goods, however at the airport there is not much luxury yet. There is an opportunity here.

Start in New York (JFK Airport is the biggest and has the most shopping potential), as a pilot, and expand later on into London, Paris, Hong Kong and depending on what the Australian market does, in Australia.

TERMINAL 4 would be most interesting for NET-A-PORTER as it is the biggest terminal with space for luxury retail. It also serves a lot of interesting Airlines as DELTA, Virgin, KLM, Singapore Airlines, Emirates, Etihad, Jet Airways, SWISS, Volaris and West Jet.
3.5 ARCHITECT

A suggestion to design the final stores.

JOSEPH DIRAND

“Dirand uses perfect lines, sensuous volumes, a monochromatic palette and rich materials.” Business of fashion

FINAL ARCHITECT

Joseph Dirand’s designs match perfectly and would make the perfect final design.
3.6 PRESENTATION

End products, video and final presentation.

BOOKLETS

LAY-OUT - booklets
BINDING AND COLOR - booklets

Magazine binding, just like Porter and they started as online magazine, thus a nice reference.

NET-A-PORTER's signature colors are black and white and as it is a business proposal it looks professional, with a monochromatic color use just like how NET-A-PORTER uses its colors.
All images NET-A-PORTER has online now make use of text that gets zoomed in on. I want to use this in my video as well. Furthermore I have to use what I have created for the booklets, as there is not much time left and it is used as an extra to get a better understanding of the retail design.
IDEA

N E T - A - P O R T E R

A luxurious experience

where every destination becomes a fashionable escape.

PHASE 1 introducing the concept
PHASE 2 showing the retail design
PHASE 3 zooming in on the map
PHASE 4 go to a destination in the fitting room
PHASE 5 change destinations
Inspired by this design, the products on the table can be on different heights.

The most important booklet high, less important on the table.

Must look clean further; no nonsense—luxury!
Using the NET-A-PORTER signature packaging on black glass which is used in store as well. Image will be printed on aluminum to give it a luxury feel, and the iPad will be behind the image, so it feels like you’re in the fitting room as well.
NOTE:
All subjects can change slightly, as this book is printed before the final presentation.
SOURCES

Sources of all articles, images and text used in this mini-processbook.
SOURCES

PHASE 1
ONLINE x OFFLINE


THE LUXURY MARKET


page 72
PHASE 2

NET-A-PORTER
Available at: https://www.youtube.com/watch?v=D9kgobzvww [Accessed 10 Jan. 2016].


SHE


THE LUXURY MARKET
Future shopping conference, own image


PHASE 3
CONCEPT DEVELOPMENT


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LOOK AND FEEL


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PRESENTATION


Binding, own images


