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The Democratization of Luxury and its Impact on the Image of Luxury Brands.

**Bachelor Project submitted for the obtention of the
Bachelor of Science HES in International Business Management**

by

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Declaration

This Bachelor Project is submitted as part of the final examination requirements of the Haute école de gestion de Genève, for the Bachelor of Science HES-SO in International Business Management.

The student accepts the terms of the confidentiality agreement if one has been signed. The use of any conclusions or recommendations made in the Bachelor Project, with no prejudice to their value, engages neither the responsibility of the author, nor the adviser to the Bachelor Project, nor the jury members nor the HEG.

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Geneva, 05/30/2017

Chrystelle BURRI

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Executive Summary

The market for luxury handbags has considerably changed over the last 20 years. It is our hypothesis here that the market of luxury handbags has gone through a phenomenon of democratization. Focusing on the city of Geneva, the present thesis wants to demonstrate that luxury handbags have become more common in the last 20 years. What are the reasons that led to this phenomenon? What is the point of view of luxury brands in Geneva regarding this evolution?

This study is an immersion in the world of luxury handbags. In order to better assess the phenomenon of democratization, two aspects seem important to evaluate. First, is this phenomenon real? Can it be tested and proven empirically? And what is the point of view of consumers on this topic? Second, what is the opinion of the companies producing these luxury handbags? Do they agree that a significant change occurred? Are they responsible for these changes, and what is the impact on luxury brands?

This research was conducted according to the design thinking method. The first part of the research is based on a quantitative approach to evaluate the consumer behaviour in the market of luxury handbag. About 220 surveys were distributed in the city of Geneva in order to collect various, and accurate data. The surveys revealed that there is indeed a phenomenon of democratization. 77% of women in 2017 possess at least one luxury handbag when only 36% in 1990. It has increased by 41%. Furthermore, it has been discovered that in 1990 only 37% of women purchase luxury handbags compared to women in 2017; 77% purchase luxury handbags as well as non branded handbags. The situation has completely change within 20 years.

The second part of the research is based on a qualitative approach. Three luxury companies were interviewed in order to gain insight into the evolution, and the impact of the democratization of luxury handbags on the brands. The aim of these interviews was to ask general, open-ended questions in order for the representative of the company to freely speak, and to share with the author the information they were willing to. Once the qualitative data were collected, they have been analysed with the empathy map. This tool allows to have a deeper understanding of a context as it not only takes into consideration the words that the speaker is using, but also his attitude. This method of analysing qualitative data grants another dimension to the interview, and gives an idea on how confident the speaker is about his statements. The interviews have revealed that the phenomenon of democratisation is not something negatively

perceived by luxury companies, it is actually the consequence of marketing strategies that they apply in order to make luxury more accessible for the mass and especially for the middle class. This new adaptation of luxury is called: “the mass-prestige”.

Finally, the recommendations are based on the obtained results. Four recommendations have been suggested for luxury companies in order to maintain the positive aspect of the democratization of luxury, and to moderate the negative aspect of it.

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1. Introduction

1.1 Aim of the Project

The work that the author realized for this bachelor project is a research document. This research is centred on the market of luxury bags. Some surveys have been conducted in order to create a personal database for Geneva, and to be able to target precisely the appropriate segment of population. This project is divided into two main chapters.

The first chapter focuses on consumer behaviour, and collecting quantitative information through surveys, to determine whether a phenomenon of democratization has indeed been taking place during the last 20 years in the city of Geneva.

After this first phase, the author answered whether or not there has been a phenomenon of democratization. When it was proofed only then It was possible to start the second phase of the project. The second chapter is based on the collection of qualitative information through interviews with luxury handbags companies. The interviews were conducted to answer the second part of the research question: "What is the impact of democratization on luxury brands?". The interviews were realized with individuals' representative of the luxury industry. The focus was on their opinion about the current state of the luxury handbag market, and if and how they maintained their activities to orient their business activities to protect their image. The objective of this work is to highlight how companies can preserve the exclusive luxury image of their brands, while expanding market effort to more segments.

The research was lead in the city of Geneva for practical reasons. Selecting several cities or a different city further from Geneva would have been too time consuming to analyse all the data.

1.2 Origin of Luxury:

Luxury has always existed, but has been expressed differently through history (Som, Blanckaert, 2015). The real definition today according to the cambridge dictionary is: "Something expensive that is pleasant to have, but is not necessary" (Dictionary.cambridge, 2017). The first signs of luxury were found in religious temples, churches and Egyptian pyramidal tombs (Kapferer, 2012). The function of luxury is to signal one's high social position to other members of one's group (Kapferer, 2012). Appearance has always been central to luxury: wealth has often been expressed

through hairstyle, clothing and other visible behaviours such as “good manners” (Thomas, 2007). Most wealthy people had expensive embroideries that were made of golden wire and precious stones. (Thomas, 2007)

Luxury and history go together, a brand cannot be labelled “luxury” if it does not have roots and inherited values that gives self-confidence to the brand (Kapferer, Bastien, 2012). However, our current understanding of “luxury” comes from France. Luxury appeared under the reign of the Bourbons between the 16th and 19th century. Many (still existing) French luxury brands like Hermès and Louis Vuitton were created in France at that time, around the 18th and 19th century (Thomas, 2007), (Maillet, 2017). The brands come from the names of humble artisans who made fancywork for the French court. After the abolition of the monarchy, France entered into the industrial revolution and industrial fortunes increased rapidly. Expensive goods became available to anyone who could afford them, regardless of class. From then on, luxury became the new way for the aristocracy to distinguish themselves from the rest of the population. At this time, luxury items were synonym of high quality. They were only produced in small quantity; most of the time, they were unique. What made these items so particular is that they had to be ordered first. An artisan had to create the item(s) specifically for the customer.¹

During World War II, many luxury companies like Chanel had to go out of business due to the German occupation in France. The Germans wanted to move the luxury industries to Berlin and Vienna, in order for these two cities to become the new capitals of culture. Once the war ended, the luxury industry was struggling to get back on its feet. Raw materials were hard to find. However, most French companies that had been closed during the war managed to reopen and many more French firms appeared on the market, such as Givenchy and Christian Dior. In the last two decades, most firms in the luxury market have empowered themselves and generated much revenue.²

1.3 What Is Luxury?

The word “luxury” comes from Latin “luxus” which means “disruption of customs” and “the excessive pursuit of sensual pleasure” (Friendly-agence, 2016). Above every definition, luxury is culture. To understand the complexity of luxury, someone has to pass you on the knowledge necessary to recognize what it is and be aware of it (Kapferer, Bastien, 2012). Luxury is the transformation of an object into a piece of art

¹ All information from this paragraph is taken from (Tomas, 2008).

² All information from this paragraph is taken from (Tomas, 2007).

(Pinkhasov, Nair, 2014). It is a way to express power and success through fashion and accessories. It is a sign of the rank one belongs to (Som, Blanckaert, 2015). Luxury also reflects quality and tradition through ages (Thomas, 2007). According to Karl Lagerfeld³: “Luxury makes your life more pleasant, makes you dream, gives you confidence and shows your neighbours you are doing well” (Thomas, 2007,p.168). The word “luxury” indeed gives a strong idea of dream and wellness (Som, Blanckaert, 2015). People easily connect luxury to fame, with luxury brands being worn by celebrities at famous galas. These brands are a way for celebrities to show that they can afford luxury items because they truly succeeded in their career (Thomas,2008). Today, the industry of luxury is worth about 130 billion Euros. It is a huge market that encompasses fashion, shoes, leather goods, jewels, fragrance and cosmetics (Thomas, 2008, p.11).

Fragrance is an introduction to luxury. It is the cheapest good of a luxury brand and gives the consumers who can not afford more the illusion that they belong to the dream of luxury (Thomas, 2008). The industry of cosmetic represents 20% of the sale of a brand (Consultancy, 2017). After fragrance and cosmetics come leather goods like handbags. Having a branded handbag reflects one’s wealth and civility to the others. Coco Chanel⁴ once said: “A women enveloped in luxury has a special radiance” (Tomas, 2007, p .135). Luxury is all about emotions. Beyond the product itself, it is about how people feel while wearing luxury items.

More than just an objective concept, luxury is also a subjective impression. What some people call luxury might be ordinary for others (Thomas, 2007). The value placed on things depends of the social and economic environment of each individual. The price is not the sole indicator to differentiate a luxury good from another good with the same function. Therefore, a strictly economic perspective does not help to define what luxury truly is (Kapferer, 1997).

Luxury can encompass many things. Any good or service that is above standard services can be referred to as luxury. In the world of handbags there is a distinction between various representations of luxury (Kapferer, 1997).

³ Karl Lagerfeld is a famous designer, photographer and dressmaker. He is also the artistic director of the « maison Chanel ». (Biography, 2017)

⁴ Coco Chanel was a fashion designer, and famous hat and dressmaker (Elle, 2017).

Figure 1 – The Luxury and Brand System



Adapted version of: (Kapferer, 1996, p.254)

According to the pyramid above, the various levels inside the environment of luxury can be ranked. The highest level is what's called in the French jargon "the griffe" (Kapferer, 1997, p.254). "The griffe" is a symbol or a sign that is proper to a brand of a person inside the brand. It is the best luxury quality, without a doubt the most prestigious. It represents a pure creation, a unique work and the materialized perfection. It also has a notion of exclusivity. Handbags under "the griffe" label are generally the most expensive, but not necessarily the most known. Their biggest fear is to be copied. An example of a luxury brand that fits this category is Dior. Its work is mostly unique and people have to order their bags before buying them. In the case of Dior, the brand does not belong 100% to the griffe because some of their productions are not absolutely unique.⁵ Hermès also belong to this category. For example, the bag: "*Himalaya Niloticus Crocodile Diamond Birkin 30*" is the most expensive bag in the world. There are only 2 copies of this model. The price of this handbag is Euro 340'000. Its particularity is that it is made of crocodile skin, decorated with 245 diamonds and white gold (18 carats).

Then comes "the luxury brand" (Kapferer 1997, p.254). This category represents: workshops, handmade work, very fine craftsmanship, and it can produce small series. An example of this category is Chanel. This category is usually considered as a warrant of quality, and also prestigious design and work. For example, the bag: "*Chanel Reissue 2.55 Size 224 Classic Flap Bag*" which is a very small purse created by Karl Lagerfeld in 2005. The creator decided to remake the Chanel 2.55 bag exactly as Coco Chanel had made it in 1955. This bag is worth Euro 3'990.

⁵ All the information from this chapter is taken from: (Kapferer, 1997, p.254).

The third level of the pyramid is “the upper-range brand” (Kapferer, 1997, p.254). They produce series in big factories, but they still target the highest quality in their sector of activity. The best example of this category is Louis Vuitton. When they started the company they belonged to the luxury brand, but since the end of the 21th century they have changed their way of production and dropped the idea of uniqueness in their bags, therefore they massively increased their production (Kapferer, 1997). For example, the handbag: “*Lockme II*” is a small piece created by Louis Vuitton. it matches this category because it is a high quality product produce in mass. Its price is about Euro 2’480.

At the lowest level of the pyramid comes “the brand” (Kapferer, 1997, p.254). It is important not to be confused with this last term which still belongs to luxury. This label does not englobe all the rest of the brands available in the market of handbags.

This category is still related to luxury. However, they represent mass series, (Kapferer, 1997) cost pressure, and an obsession to keep up the level of quality of their product, but it is not easy to play on everybody. By increasing the production, they lose the handmade quality label. To maintain a high quality on every product that comes out from the factories is a huge challenge. Their biggest fear, unlike the griffe, is not to be copied, (Kapferer, 1997) because when producing in mass, it is certain that some people will try to replicate the work. However, they highly fear counterfeits and fake items of the brand (Kapferer,1997). The best example of this category is Zofara⁶ (Zofara, 2013). They proudly state that they produce massively their handbags and that it grants them biggest benefits.

1.4 What Does “Democratization” Mean?

“Democratization” means that something has become more popular than it used to be. Something that used to be inaccessible to everyone in the past is now easier to obtain for a large number of people (regardless of their income). When we say of something that is has been democratized, it only concerns the quantity of people that have access to this item compared to the past. In the context of luxury handbags, the democratization of this market means that handbags are more available to the mass population than it used to be. The hypothesis here is that if it is observable that these items are more widely owned nowadays than they were in the past, it shows that they

⁶ Zofora is a label based in Sydney. The brand was created by the designer : Sophie Robson (Zofora, 2017).

are in the process of democratization. So far, “democratization” does not imply a loss of value in a product, it only refers to the evolution in the amount of people buying a certain good.⁷

1.5 The Democratization of Luxury

The democratization of luxury is the most important phenomenon in marketing today. There is a growing interest for luxury goods and services, but at the same time, luxury is by definition something rare (Kapferer, 1997). Thus, there is an inconsistency in the definition of luxury. In light of this paradox, we can wonder how is it possible for the luxury industry to keep up with the notion of exclusivity and rarity, while opening more stores and increasing their sales (Radon, 2012).

According to an article from Credit-Suisse, there are seven major tendencies that are responsible for the growth of the international luxury industry. Out of these seven tendencies, three of them are of particular interest for my research. The first reason for the growth of the international luxury industry is that the social networks (Facebook, Twitter and Instagram) make searching for a product easier and more accessible, as it is the case with online sales. The emergence of the Internet greatly influenced the consumers’ way to purchase; they now have access to platforms where they can purchase “second-hand” luxury items (items that have been used by someone else before). Many of these second-hand markets are online and connect customers directly to the sellers. This new way of purchasing may affect the market of new items.⁸

The second-hand market had massively increased over the past 10 years, more and more customers are reselling their old items through digital platforms. In 2014, the world wide value of personal luxury goods⁹ was: 224 billion Euros (Statistica, 2017). The value of the second-hand market for personal luxury goods on the same year was: 16 billion Euros (AFP, 2015). The C2C market is taking about 7.14% away from the original luxury industry.

Nowadays, it is not easy to target the typical consumer of luxury good. There is a general impression that the rich and wealthy are the only consumers of luxury products, but people from middleclass purchase more and more luxury brands (Som, Blanckaert, 2015). Although the middleclass does not have the purchasing power to

⁷ All the information from this chapter is taken from : (Dictionary, 2017), (Merriam-webster, 2017), (Thesaurus, 2017), (Kapferer, Bastien, 2012)

⁸ All the information for this paragraph is taken from: (Credit-suisse, sans date)

⁹ The personal luxury goods encompass : watches, jewels and handbags.

buy as much as the upper classes do, the reality is that the luxury brands must market their products to a wide array of people (Academia, 2017).

As mentioned above in the definition of luxury (see 1.3. What is luxury), handbags are the most accessible luxury item after fragrance and cosmetics (Thomas, 2008). Therefore, it is the one object that best reflects the symbol of the democratization of luxury. Not everyone can afford to get dressed in “haute couture”, but it might be easier to save money to have one “visible” item like a bag that you can exhibit at your hand everywhere you go (Thomas, 2008).

There is a paradox in labelling a product “luxury” because in one hand, democratizing a product means that you want to sell this item as much as possible, but on the other hand luxury means exclusivity (Radon, 2012). The very definition of luxury is a good that it is not accessible to the mass (Thomas, 2008). If everybody has access to luxury, what is luxury? These two words are not supposed to be combined because they contradict themselves. Something unique cannot be multiplied (Kapferer, 1997).

At its origin, luxury was meant to be rare and unique (Thomas, 2007)! The supply was low and the price very high on purpose, in order that only the wealthiest could own luxury goods.

In theory, luxury brands should be desired by all, but only be accessible to the happy-few, in order to keep “the dream of luxury”. If luxury becomes reality to the majority of the consumers, the consequence is that luxury loses its lustre (Thomas, 2008). In fact, this is the paradox stemming from the association of the words “democratization” and “luxury”. The more a luxury brand is purchased the more its aura is affected (Kapferer, 1997). That one thing that makes luxury so special, that creates a sense of quality, and identity, the whole concept of luxury, the one that generates dreams is eventually fading away when associated with the phenomenon of democratization.

1.6 The Market of Luxury Handbags:

A handbag is the one item that makes the difference on a woman’s outfit. Lately, everybody started to dress the same way and wear similar shoes, but handbags can be made out of a large variety of raw materials. There is no “fashion faux pas” with handbags: every colour and style is possible (Thomas, 2008). It can also be the touch of fun of your outfit. Many women think that they can dress with regular attires, as long as the purse is branded, they will suddenly look fancy. A purse can tell a lot about its owner, regardless of what is inside the bag, its design and brand will tell you about a woman’s dream or reality (Thomas, 2008).

Since 1990, leather goods have reached the same level as fragrance and cosmetics. They are now products used as an introduction to a brand (Tomas, 2008). Unlike fragrances they are visible and the brand is recognizable through a clear logo. In the last 20 years, a new passion for handbags has emerged. The same way it works with fashion, luxury brands create and launch new bag designs each season (Tomas, 2008). A new trend comes with every spring and fall collection.

In the past, luxury handbags were sometimes almost as expensive as a complete outfit (Thomas 2007). However, this has changed over the last 20 years. Even though some luxury bags remain very expensive, it is now possible to find cheaper bags still belonging to a luxury brand. The company plays with the material used for the bag. For instance, changing the leather for nylon is cheaper to produce (Thomas, 2007). Although the production is less expensive, these cheaper bags still benefit of the brand umbrella. That's where the good acquired its value.

Handbags have become the new trend for luxury. Nowadays when someone enters in a luxury store, regardless of the brand, the first things that they will see are handbags. Handbags are the first contact with the brand (Thomas, 2008). In general, they are the fashion item that are the easiest to sell because they can match with every woman: there is no problem of size. Moreover, there is no need to try the product on before buying, so there are no intermediary steps between desiring the good and buying it (Thomas, 2008). Nobody needs to try it on before buying because once the desired bag is found, it creates a desire of acquisition and you buy it with no other intermediary steps in between. As Muiccia Prada¹⁰ said: "It is easier to choose a bag than a dress. And there is kind of an obsession with bags. It is so easy to make money. The bag is the miracle of the company" (Tomas, 2007, p.168).

1.7 Design Thinking

Using the design thinking method is a way to gain better understanding of a context. It helps to immerse oneself into a universe that is not easily accessible. The design thinking method helps to identify the players and the issues of a specific environment. This method provides an accurate way to analyse data. The aim of this method is to observe, participate and immerse oneself, in order to have a full and complete

¹⁰ Muiccia Prada is an Italian fashion designer and business women, she also created the brand Miumiu under the umbrella of Prada. (Vogue, sans date)

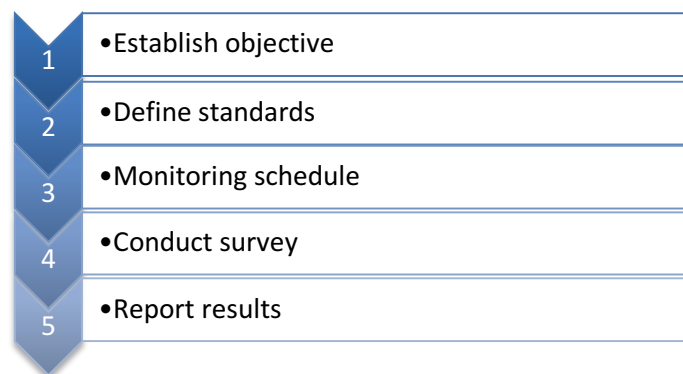
understanding of a situation. For this study, the data was collected through a quantitative and a qualitative approach.¹¹

1.7.1 Creation and Preparation of a Quantitative Strategy

There are two quantitative strategies: survey research and experimental research. Survey research is used to number things, to obtain ratios and percentages to specific questions. It helps to highlight trends and describe attitudes. The survey is a study of a sample of the population. The larger the sample, the more accurate the data to analyse will be. The questions that will be asked in this survey must be closed-ended. This approach is used to test theories. The result will provide very specific data that will be analysed in a statistical procedure. The variables in the survey are grouped then the author tries to define the relationship between all these variables. This method is appropriate to confirm an assumption or to point out the misunderstanding of a situation.

Experimental research means to study different groups at the same time. Each group receives a different treatment. One treatment is provided on one group and not on the other, so the impact of the treatment can be analysed. It is a way to determine if a specific treatment affects the final outcome.¹²

Figure 2 – Overview of Quantitative Research



Adapted version of:
(Psychwiki, 2017)

In the context of this project the first quantitative strategy (survey research) is more appropriate. Firstly, a topic has to be chosen (Psychwiki, 2017). Here, the objective of the quantitative research is to determine whether there is a phenomenon of

¹¹ All the content of this paragraph is taken from (Pauletto, sans date a) and (Pauletto, sans date b)

¹² All the content of this chapter (1.7.1) is taken from: (Creswell, 2009)

democratization in the market of luxury handbags. Therefore, using a survey will help to confirm or refute the first part of the hypothesis in the research question (Psychwiki, 2017).

To create a good quantitative survey, the first step is to establish objectives. As explained in the first chapter (see 1.1. *Aim of the Project*), the objective of this quantitative research is to be able to confirm or refute the hypothesis that there is a phenomenon of democratization of luxury.

The second step is to define standards. It starts with the selection of the sample that will answer the survey, and having a clear representation of the group focused on (Psychwiki, 2017). The preparation of the questions, the order they appear in the survey, and the way they are formulated matters. The person answering the survey should not know the aim of the survey until they answered all the questions. Guessing or knowing the reason why the survey is conducted before answering or after answering the first questions may influence the answers given when completing the forms. The subject may unconsciously answer what he thinks the interviewer expects to find out.

Then, when and where the survey should be realized must be scheduled, keeping in mind how important it is to select an appropriate location and time to meet the segmented group. After the program is set and the survey organized, the questionnaires are administered.

Finally, the last step is to report the results obtained through the survey, and transcribe the data to interpret and analyse them.

1.7.2 Creation and Preparation of a Qualitative Interview

The preparation of a qualitative research requires collecting various forms of data like interviews and observations. An interview is the best tool to amass qualitative inputs. It is important to search for the true meaning behind words. The interviewed person may try not to deliver all the truth or can simply be holding information. Therefore, being able to hear what the person is saying is essential, but being able to interpret the data is too.

The way questions are formulated and the order they appear in is key to the qualitative approach. It is important that, reading the questions, the interviewee feels free to give any answer, and feels that all answers are acceptable. If the construction of a question suggests what the interrogated person should answer, it will affect the value of the data

since it is not what the speaker would have spontaneously declared. The questions must be open-ended and general. It is a way to gain detailed information. With open-ended and general questions, the consulted individual feels free to express what he wants to. The freer the speaker feels, the more he will reveal accurate information. In this approach, the significance of words is primordial. If the question is too specific and only allows the person to shortly reply, it can affect his genuine opinion and hold important data.

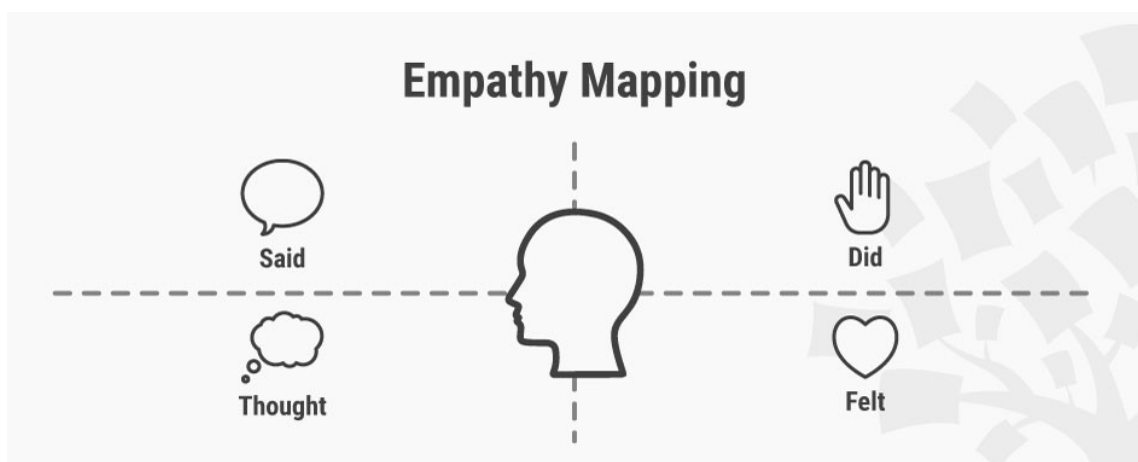
Certain words should better be avoided because they can lead the interrogated person to a negative feeling and/or a defensive position which could stop him from freely sharing his point of view. For example, in this study a word to avoid is “democratization”. It is better to talk about “evolution” than “democratization” because it sounds more positive.¹³

1.8 Restitution of a Qualitative Interview:

The hardest part when analysing a qualitative interview is to ensure that the speaker was properly understood. The attitude of an individual while talking and his body language can also provide information about what he is saying. The way interviewed people are formulating their ideas can be hiding deeper information.

Therefore, the qualitative interviews were analysed through a map of empathy.

Figure 3 – Map of Empathy



(Interaction-design, 2017)

The map of empathy helps to gain a deeper insight of the qualitative data collected through interviews (Solutionsiq, 2016). The map is divided into four categories: “Say”,

¹³ All the content of this chapter (1.7.2) is taken from: (Creswell, 2009)

“Think”, “Do” and “Feel”. Each category focuses on a specific aspect of the answer provided by the speaker (Solutionsiq, 2016).

“Say” is the exact transcription of the speaker’s words, without interpretation. “Think” is about understanding the thoughts behind the speaker’s words. “Do” focuses on the body language and attitude of the speaker when answering the questions. “Feel” mostly concerns the emotions of the interviewed person. To be able to understand what a person really feels about a particular topic, analysing the category “Do” is important. For instance, the choice of words and the tone of voice can give significant information about the speaker’s feelings (Interaction-design, 2017). The part “Do” and “Say” are pure observations and transcriptions of what is seen and heard. Through “Think” and “Feel” the data is interpreted in order to access the concerns and aspirations of the speaker (Solutionsiq, 2016).

Using a map of empathy is the best way to analyse qualitative interviews of luxury brands because it helps extracting more information out of interviews. The world of luxury brand is not easily accessible and companies do not like to share information about their brands, customers or habits. This tool helps to see if the speaker is confident about his answers or if he feels uncomfortable. In both cases it provides clues about the quality of the collected information.

1.9 Market Segment Focused on

This project has several groups of people that are focused on. For the quantitative part of the research, the focus was on the customer’s point of view. Two surveys were designed, each targeting a different group of women. As the market of handbags mostly concerns women, it has been decided to keep men out of the survey. There were only three prerequisites for survey 1’s group: the age of the interviewed women (they must be under 40 years old), their income (they have to be salaried employees), and their place of living, (they must live in Geneva). The second segmented group related to survey 2 had the same criteria as the first group, except for the age of the interviewed women, they must be over 40 and some of the women, such as housewives, were not salaried employees; they therefore answered according to the house’s revenue. Thus, for both segmented groups, the requirements were kept very low (only three criteria). As the author wants to evaluate a phenomenon of democratization within the female population of Geneva, every possible type of women was interviewed, regardless of their looks and appearance. A phenomenon of democratization impacts on a majority of people, which means that many women, regardless of their social class, hobbies or jobs are concerned by this phenomenon.

This prejudice-free attitude vis-à-vis of the interviewed women ensures the survey is not biased towards the results that would confirm our hypothesis.

The last segmented group was selected to gain insight into the company's point of view. The targeted people of this group were men or women working for a luxury brand. They had to be able to answer questions related to the evolution of the brand through the last 20 years. They had to be in charge of a store based in a shopping street or in charge of the communication of the luxury brand. This group is expected to have access to the mission and vision of the company, as well as sells and production numbers over the last 20 years in order to see the evolution of the company.

2. Market Analysis

2.1 Customer's Point of View:

This research was conducted to have a better understanding of the consumers in the market of luxury handbags today and in the past in order to see if there is a change in the purchasing habits and within what class is has occurred, therefore it was important to create two surveys.

2.1.1 Sampling Decision:

The two surveys have been distributed on three different days, and at different times during the day. It was important to work on several days to obtain a more realistic collection of data. Depending on the time the surveys were distributed, different kind of women have been met.

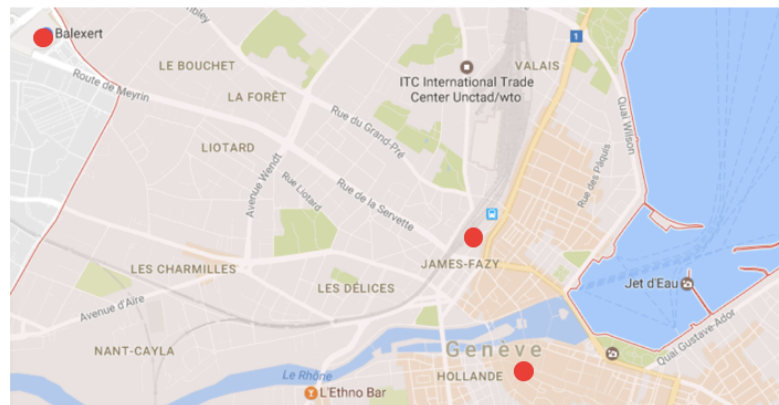
- The first time was on a Wednesday afternoon from 1PM to 3PM at three different places in the old town (Bel-air, place du Molard, Rive).
- The second time was on a Thursday evening after work, from 6:30PM to 9PM at the shopping centre "BALEXERT".
- The third time was on a Monday morning from 10 AM to 1PM in front of "MANOR" (near the train station).

During these different scheduled sessions, the largest target group of the population of women have been met. On Wednesday it was most likely to distribute the surveys to mothers, probably working part time, and having the afternoon off to take care of their children. On Thursday it was most likely to meet working women that just finished their working day. Finally, on a Monday morning it was most likely to meet women that were

working on Saturdays, and that have Mondays off to compensate, or women that are not necessarily working. Between 12PM and 1PM, it was also possible to meet working women that stopped by to buy lunch.

The locations have been selected in order to meet any kind of women from every social rank, and of any age. It was important for example, not to go on a street like the “Rue du Rhone” where all the luxury handbags stores are. It would have affected the objectiveness of the data. It was important to remain neutral and distribute the survey to any women passing by without staring at their handbag first, and thus influence the result of the survey.

Figure 4 – Distribution Places in Geneva



Adapted version of: (Goggle, 2017)

According to the map above, three locations were selected: one on the right bank of Geneva, and one on the left bank. Again, it was important for the diversity of the sample. In the city centre, the questionnaires were distributed at bus stops to make sure that women would have a couple minutes to fill in the forms. The strategy was to come after the bus left, and wait for the next potential candidate that would come and stand, waiting for her bus. A woman waiting at a bus stop is most likely to have time to answer the surveys than a woman walking from point A straight to point B.

The shopping centre also seemed to be a good location, since it is a grouping of diverse shops where women usually go and spend hours. Therefore, it was expected that many women would have time to answer the surveys.

2.1.2 Execution of the Quantitative Survey

2.1.2.1 Survey 1

Survey 1 (Appendix 1) was created for young active women. It was distributed to women between 25 and 40 years old. Survey 1 was used to determine whether young women in 2017 tend to purchase more luxury handbags than in the past, regardless of their salary or social rank.

Through the interrogations it has been tried to select questions that will tell straight if the interviewed women confirmed the hypothesis or not. Survey 1 is made of eleven questions. Ten of those questions are close-ended questions, and based on their current shopping habits.

In order not to influence the answers of the candidates, the questions were not formulated in a direct way. When reading the questions, the candidates would know that it is about luxury handbags, but not necessarily that the survey is related to the democratization of luxury. Only the last question could give a hint about the real stake of the survey.

2.1.2.2 Survey 2

The second survey (Appendix 2) was created for active women that are in a confirmed career or social position. The survey has been distributed to women between 40 and 65 years old. The questions were mostly the same as in survey 1, but they concerned women's shopping habits from 20 years ago, when the candidates used to be in the first category of young active women (candidates from survey 1; women between 25 to 40). Therefore, these women were required to make abstraction of their current situation and only answer the questions as if they were 20 years younger.

Originally, the idea was to submit both surveys to these women. It was then possible to compare their current habits with their habits in the past. However, asking the same candidate to answer both questionnaires would probably have had an influence on the second survey. They might have had the answers of the first one in mind, which would have affected the spontaneity of their answers.

The objective of survey 2 is to determine whether women purchase more luxury handbags today than in the past. This survey will provide data in order to compare the shopping habits of young active women with the shopping habits of active women 20 years ago.

2.1.3 Struggle With the Sample

During the surveys' distribution, the team noticed that getting the required number of surveys was harder than expected. The unwillingness to answer was due to a lack of time, a reluctance to share private information or the women simply refuse to take the survey. Originally, the only instruction given was to target women, regardless of the handbags they owned. Depending on their age, survey 1 or 2 was given to them to fill in. However, during the first session at the city centre it was noticed that women owning a luxury handbag were less accessible and more likely to refuse to answer the forms. Therefore, most of the surveys collected on Wednesday were not representative of the population.

The distribution team also noticed that women were usually reluctant to complete the form, while some men spontaneously offered to help and answer a questionnaire.

This observation on gendered behaviour helped to rebuilt a strategy for the second session on Thursday.

For the second survey distribution, a new team was selected. Instead of six women, a team of four men distributed the surveys at the shopping centre BALEXERT from 6:30PM to 9PM.

This new attempt led to the following two observations. The selected schedule was not the best: everyone was in a hurry, looking forward to end their day, and absolutely not in the mood to answer a survey between their activities. However, the new gender strategy paid off: women were more accessible to male interviewers. They would let them come closer and start explaining the survey before brushing them off. The negative reactions were mostly due to a lack of time; none of the women had suspicious reactions as they had had with the female team of interviewers. On the contrary, women often told it was "funny" for a man to ask questions about handbags. They also seemed to answer more freely in front of a male interviewer. This could be explained by the fact that men are thought to be less familiar with the topic of handbags, so that women could answer the questionnaire without fear of being judged for their answers.

According to Mrs. Pauchard in her master thesis, there is indeed a correlation between the gender of the interviewer and the interviewee (Pauchard, 2014). She says that genders have a particular dynamic on the exchange of information between two individuals. A woman will tend to speak more, use more words than a man would do. She will also share information with emotion (Pauchard, 2014). Women take extra time

to explain contexts and situations in order to obtain the most accurate answers, if they do not obtain the expected answer they will rebound with new questions to help the person that is answering the interview (in this study, it was a questionnaire) (Pauchard, 2014). A man is more direct and go straight to point. A person interviewed by a man will tend to share less, to contain its emotions and to directly deliver the expected content (Pauchard, 2014). In this study, it has been confirmed that women did not want to lose time. Therefore, having a man to distribute surveys to woman might have unconsciously lead to a positive reaction in the behaviour of the potential candidates.

Due to the lack of participation, an online survey was created. To create this questionnaire online, the software "google forms" was used. This platform offered various options that were interesting to use. Depending on the answers provided by the candidate, the form grants a different page access to the participant. These options helped to properly guide the survey pass.

Social networks were used to spread the survey on the Internet and get more candidates to participate. The advantage of an online survey is that it is more convenient to fill in (from anywhere, at anytime), which helped increase the participation, despite the original reasons the women gave to ignore the questionnaire (i.e. lack of time, etc.). As the online survey could not filter the candidates according to the three requirements (age, salary and place of living), some options were added to the online questionnaire. If a woman answered that she was older than 40 years old, she was directly assigned to survey 2. If a woman answered that she was unemployed, the survey ended automatically.

A male team also did the last distribution session, but the time and location was changed. This time, the questionnaires were distributed in front of MANOR between 10AM and 1PM. After launching the online survey, the quantity of women above and under 40 years did not equate anymore. As could be expected, most women that had participated to the survey on social networks were under 40. Therefore, more women above 40 were interviewed during the last session of survey distribution, in order to have as many surveys 1 and 2 completed.

2.1.4 Observation Study

As mentioned in the previous section, it was noticed during data collection that women owning a luxury handbag did not respond positively to the survey request. Therefore, another way to collect data about luxury handbags was designed.

The idea was to observe women’s handbags when paying at the register of the “take out bakery” area at MANOR. The collect of data happened during three Saturdays:

- Saturday, February 25th from 8AM to 6PM.
- Saturday, March 3rd from 8AM to 6PM.
- Saturday, March 9th from 8AM to 6PM.

Table 1 – Results of the Observation Study

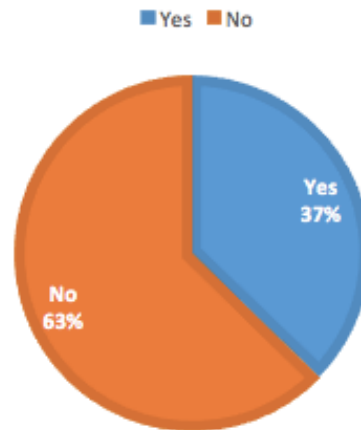
	<i>YES</i>	<i>NO</i>	<i>Total</i>
<i>February 25th</i>	64	102	166
<i>March 3rd</i>	57	100	157
<i>March 9th</i>	69	117	186
<i>Total</i>	190	319	509

“YES” means: women were wearing a luxury handbag; For this study it has been considered that the following brands belonged to the luxury market: Chanel, Luis Vuitton, Prada, Hermes, Michael Kors, Gucci, Dior.

“NO” means: women were wearing any other bags that do not belong to the first category “luxury market”, with the brands listed above.

Figure 5 – Observation Study in Percentages

OBSERVATION STUDY IN %



During these Saturdays, through 30 hours, 509 women paid at that register. Among them, 190 had a luxury handbag¹⁴ and 319 had a regular handbag¹⁵. This means that 37% of the population of women that came into the store owned a luxury handbag.

Nevertheless, in the 63% of women that had not a luxury handbag, half of them had a branded one like: Longchamp, Lacoste, DKNY, Guess, etc.

The risk of this observation is that some factors may have affected the objectivity of the study. Some women counted in the percentage of women not owning a luxury handbag may own one, but were not wearing it on that day. Still in the percentage of women with a regular handbag, some women might own a luxury handbag whose brand was not recognized. Finally, in the percentage of women that owned a luxury handbag, it is possible that some of these bags were not originals but counterfeits, thus altering the results.

2.1.5 Results

In Appendix 9, surveys 1 and 2 are compared. Survey 1 inquires about the consumer behaviour of young active women between 25 and 40 years old; survey 2 about the consumer behaviour of young acting women between 25 and 40 in the 1990's. The 20-years difference between the two surveys' studied periods should be long enough to determine whether there is a phenomenon of democratization for luxury handbags.

¹⁴ In this observation, we considered that the following brands belonged to the luxury market: Chanel, Luis Vuitton, Prada, Hermes, Michael Kors, Gucci, Dior.

¹⁵ Any other bags that do not belong to the first category "luxury market", with the brands listed above.

A total of 220 women participated to the survey. 110 answered survey 1 and 110 survey 2. 160 surveys were collected from the distribution on the street and 60 were answered online. The result of the 220 surveys are analysed in Appendix 9.

The first question is about nationalities. The question was a way to collect more insight about the nationalities of women present in Geneva. Rather they live here or not, they contribute to the phenomenon of democratization of the luxury handbags in the city of Geneva, if they shop here. However, the purpose of this question was to ensure that regardless of their origins all women have a similar consumer behaviour regarding luxury handbags. Nevertheless, women were more or less from the same region, meaning they would have evolved within the same socio-economical influences. About 60% of the respondents were Swiss and 30% were from Europe.¹⁶ It represented an accurate percentage to base the survey on.

The second question is an indicator of income. The phenomenon of democratization is closely linked to income: democratization means that more women own luxury bags, regardless of their income. This second question showed that survey 1 and 2 had more or less the same percentage of income. The majority of women make less than

CHF 5'000. This means that all the women were more or less in the same financial situation in 1990 and in 2017. However, even though the amount is the same, CHF 5'000 in the 90's does not have the same value in 2017.¹⁷ It also indicates that the questions were mostly answered by low middleclass women. According to an article of the RTS, anyone with a salary between CHF 3'750 and CHF 8'300 belong to the middleclass. Therefore, all the women that have a salary around CHF 5'000 belong to the low middleclass (RTS, 2017). This is a good population sample to evaluate phenomenon of democratization of luxury handbags.

77% of young women in 2017 answered the third question: "Do you own a luxury handbag?" positively. This is a very high percentage; more than half of the women from survey 1 own at least one luxury purse. In comparison, only 36% of the women from survey 2 (which means in the 90's) had at least one luxury bag. The majority of women answered negatively. Not only do the answers to this question show an increase of 41% in the number of women that own a luxury handbag, they also show a complete reverse. For the 1990's the majority of women answered negatively and in 2017 the

¹⁶ 87% of women from Europe actually specified that they were from France, near the border.

¹⁷ According to the official website of the Swiss confederation CHF 5'000 in 1990 equals CHF 6'456 in 2016 (information about 2017 are not available yet).(Portal-stat, 2017)

majority answered positively. This result can also be explained due to a difference in the definition of a luxury handbag that has evolved within 20 years.

The fourth question concerns an approximation of the percentage of luxury handbags women have in their wardrobe. For example, on a total of 100 purses, how many are from a luxury brand. These results are represented in the graphs 4.1 and 4.2. As aforementioned, the majority of young women in 2017 (survey 1) had at least one luxury purse. Graph 4.2 (representing young women in 2017) shows that most women owning at least one luxury handbag have few luxury handbags. It seems important to these women to have at least one for nice occasion, but most of the handbags they own are not luxury products. 42% of the women answered that up to a fourth (1 to 5 handbags over 20) of all the handbags they own are luxury handbags. As for the graph 4.1 (representing women in the 1990's), only 29% of the women own between 1 and 5 luxury handbags on a total of 20. It seems important to these women to have at least one for nice occasions, but most of the handbags they own are not luxury products.

Question 5 gives indication about the purchasing habits of women. It tries to determine the frequency at which women tend to purchase handbags. Both surveys provided the same answer: the majority of women in the 1990's as well as in 2017 do not frequently buy handbags. 61% of the respondents from survey 1 and 55% of the respondents from survey 2 answered "no" to the question "Did you regularly purchase new handbags?". Even though the final answer is the same for both surveys, still, there is an increase of 6% between survey 1 and 2 which seems to indicate that women in 2017 purchase handbags slightly more frequently than in 1990.

Question 6 is connected to the previous one: this question evaluates what kind of handbags women purchase. The aim here is to see whether women in the 1990's had the same consumer behaviour as women in 2017. Do women in the 1990's and in 2017 buy luxury brands only, not branded handbags only or both?

Figure 6 – The kind of bags women buy- 1990/2017

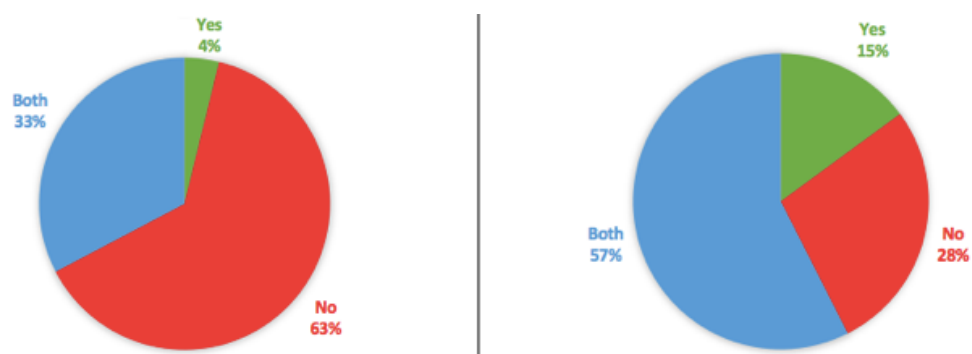


Figure 6 is the representation of graphs 6.1 and 6.2 from Appendix 9. “Yes” means that women only buy luxury handbags, “No” means that they do not buy luxury hand bags and “Both” means that they purchase both types of goods. On these graphs, the changes between the 1990’s and 2017 become clear. In the 1990’s the majority of women purchased not branded handbags while most women in 2017 bought both, luxury handbags and not branded handbags, by 57%. The consumer behaviour regarding luxury handbags has indeed changed. In addition, in the 1990’s merely 4% of women only bought luxury purses, while this number increased to 15% by 2017. The most surprising result is that only 28% do not buy luxury purses at all. If the percentage of women purchasing both types of handbags is encompassed with the percentage of those who only purchase luxury purses; the total represents 72% of the female population.

This leads to the following result: 72% of women under 40 years old in 2017 are consumers of luxury handbags while 37% of women under 40 years old in the 1990’s. The difference is significant.

Question 7 enables to define what women mean by “regularly”. For someone, regularly might mean every 6 months, but for someone else regularly would mean every month. The data collected show that a woman purchasing at least one bag every three months considers that she buys purses regularly, and when exceeding 3 months, she does not consider that she rarely purchases handbags.

The ninth question shows what brands women own and which brands are most popular. For survey 2 the top three of the most appreciated brand in the 90’s are: 1) Longchamp, 2) Louis Vuitton, and 3) Gucci. For survey 1 the top three is: 1) Michael Kors, 2) Longchamp, and 3) Louis Vuitton. Both surveys revealed that Longchamp and Louis Vuitton are in the top three. This means that the brands were already popular and appreciated 20 years ago. In the open category “other”, the brands that were often mentioned are: Calvin Klein, Céline, Fendi etc. This graph is explained in more depth in the following chapters.

The last question is a general question about the personal opinion of consumers on democratization. To the question: “Do you think it is easier to own luxury handbags today than 20 years ago?” both surveys got the same result: 85% of the participants think that it is indeed easier to have a luxury handbag today than in the 1990’s.

In conclusion, the first part of our data analysis seems to indicate a clear phenomenon of democratization. In 2017, more women own luxury handbags than 20 years ago. Hence, the first part of the data analysis seems to confirm our hypothesis.

2.2 Companies' Point of View

2.2.1 Development of the Interviews Qualitative

According to the result of the surveys, Louis Vuitton, Longchamp and Michael Kors are three brands that are very democratized and that seemed relevant to interview: Therefore, an interview with these three brands was required. Michael Kors did not positively reply to the request therefore; it has been replaced by Céline that was mentioned regularly by women in the street. Obtaining these three interviews turned out to be harder than expected. The world of luxury is very restricted and luxury brands do not seem to appreciate someone being “prying” or that is “losing its time”, even coming from a student. After several written refusals from other brands, the author decided to request short interviews with managers directly at luxury stores in the rue du Rhône in Geneva. Longchamp and Céline accepted to give an interview, but required seeing the questions prior to the meeting. Of course, this affected the spontaneity of the answers given. On the other hand, the answers were thought through by the brands as they had time to prepare efficient answers.

2.2.2 Longchamp

Before sharing the result of the interview, a short introduction about the brand seems important. Longchamp is a French company specialized in the work of leather goods. It was founded by Jean Cassegrain in Paris in 1948. The company is mostly known for its handbags (created in leather or in canvas) and for its traveling items (for instance, luggage's, passport covers, luggage tags etc.). Longchamp also make fashion accessories and lately, “ready-to-wear” clothes. Today, the brand Longchamp is still owned by the Cassegrain family. The brand has evolved with the founding family. The grandson of Jean Cassegrain manages the company with a more modern approach. He combined what already existed from the brand with different desires. Longchamp is available in more than 300 stores throughout the world. The store located in Geneva at the Place du Molard is one of the most prestigious store of the brand.¹⁸

¹⁸ All the content of this paragraph is taken from (Longchamp, 2017) and Appendix 6.

As mentioned in chapter 2.1.5, Longchamp is in the top three luxury brands most bought by women, not only in 2017, but also in 1990. It seems that Longchamp was already very appreciated by the middleclass 20 years ago. The interview with Mr. Claudio Mazzotti¹⁹ and the map of empathy of the interview are found in Appendix 4 and 6 which summarize how Longchamp sees the changes of its brand value, what defines its image and how Longchamp defines the evolution of their customers.

Before starting the interview, the aim of this project was explained to Mr Mazzotti: the answers obtained during the appointment should provide insights about the evolution of the brand through the last 20 years. The questions were oriented on the concrete changes between today and the past. The answers provided by Mr. Mazzotti have helped increasing our awareness of the impact of the changes on the value, the image and the customers of Longchamp.

The first part of the interview was centred on Mr. Mazzotti himself, on his functions and responsibilities within the firm. Its aim was not only to get to know the respondent, but also to see how he was answering personal questions, related to him instead of the brand. This first question²⁰ was then used to analyse the answers of the rest of the interview. It was meant to serve as a sample of Mr. Mazzotti's natural tone of voice, and how he expresses himself in order to be able to analyse the rest of the exchange in an objective way. The second part of the interview was mostly about to the image of Longchamp and its customers. Finally, the last part of the interview focused on the store' sales.

According to Mr. Mazzotti; the most important aspects of Longchamp's image are handicraft and expertise in leather goods (being the brand's main occupation). What Longchamp values the most is the work of leather and everything related to handmade fabrication. This is the image the founders of the brands' have been working on since its creation. The experience Longchamp has acquired through the years is what differentiate it from other brands. Mr. Mazzotti, says that the image of Longchamp has not completely changed since its creation. To him, these values have always been the core of the company. They have been confirmed through the years and have evolved. However, one aspect of Longchamp has changed and helped the brand differentiates itself from other brands: the desire to communicate. Today the brand communicates

¹⁹ Claudio MAZOTTI is the store manager of Longchamp at Place du Molard in Geneva.

²⁰ The question was: "What position are you holding at Longchamp and since when are you working for the brand?".

more than in the past, and this new way of communicating seduces its customers more.

During the second part of the interview, the questions aimed at determining the brand's typical customer in the present and how it might vary from the typical customer 20 years ago. However, the author learned that different products are designed to attract different types of clientele. For instance, some products are created to attract young women, while other products match mature women's expectations better. "A customer at Longchamp can evolve with its desire" said Mr. Mazzotti. He also added: "We sincerely do not have one type of customer", then adding, on second thought: "There is actually something that connects all the customers of the brand, they will all be sensible to the price/quality index and are particularly not ostentatious." The customers of the brand nowadays are more diversified than 20 years ago. According to the store manager, this is due to a change in the products the brand offers. Today Longchamp tends more to luxury, with more complex²¹ and expensive items. Inevitably, the customers have also evolved with the brand and Longchamp followed the evolution of its customers.

Mr. Mazzotti sounded very enthusiastic about this change. When he was asked if Longchamp sees this changes as positive, he did not hesitate to answer: "Yes".

He shared that, not only is the diversity of customers very motivating, but it has also led to an adaptation of the sales techniques. The store manager explained that the brand practises an active way of selling which means that the employees of the company will go to the customers and interrogate them in order to find out what product would best match a client's expectations.

The last part of the interview was not carried out as planned, as Mr. Mazzotti was not allowed to answer any questions related to numbers or performance of the store. Instead, the interview turned into a discussion. The information shared was spontaneous and therefore, highly trustable.

Within the last 20 years, the brand has been through a huge evolution in sales and in the supply chain. Longchamp has considerably increased its turnover and is now connected to its consumers in ways it was not before. Originally, Lonchamp used intermediaries to sell their bags, but now in addition to the intermediaries the are directly connected to the customers. Mr. Mazzotti mentioned that the brand was

²¹ "Complex items" means: products (handbags) that are harder to realize, create, and match the customer expectation. Finally, a production for which details matter.

satisfied with something that did not change throughout the years: its authentic way of fabrication for their bags. Longchamp remains a leather goods producer.

To the question “Which model of handbags do you sell most? “, Mr. Mazzotti replied without hesitation “Le Pliage”. (See figure 7 below)

Figure 7 – Longchamp’s Best Seller: “Le Pliage”



(Courtney, 2017)

“Le Pliage” is a handbag launched exactly 20 years ago, when the company started to transform the brand, and to evolve with its new customers’ desires. This product is universal; the idea of a foldable bag corresponds to a practical need. It stands amongst the entry-level products and represents luxury for the everyday. One purse is sold every 12 seconds. Its price depends on the size, starting from CHF 60 up to CHF 150. The most appreciated size of the purse is “the shopping” model which costs CHF 95.

The motto of the brand is “luxury in intimacy”²². It corresponds to the brand’s policy: Mr. Mazzotti thinks that Longchamp is not ostentatious luxury. He explained that a small horse might appear on certain bags, but in general, the brand remains discrete with visible signs, as many customers do not like to have a clear logo on their handbags.

In conclusion, the results of this interview tend to prove what Jean Cassegrain said about “Le Pliage”: it is a must have for a woman (Isbn-magazine, 2016), to which Mr. Mazzotti agrees to say that every woman deserves and should have a Longchamp, because every woman deserves to have a nice quality handbag.

2.2.3 Louis Vuitton

Louis Vuitton is a French firm that produces luxury leather goods since its creation in 1854. Since 2000, the brand also provides “ready to wear” collections to its customers. This brand is known worldwide. Louis Vuitton is the first brand of the LVMH group, created in 1987. In 1989, the billionaire Bernard Arnaud acquired the brand and became the CEO. Bernard Arnaud has considerably improved the image, and the

²² Translated into French by: « le luxe en toute intimité ».

priorities of Louis Vuitton within the last 20 years. He worked on the expansion of the brand worldwide and tend to focus more on « high-end products » aspect in order to preserve its luxurious image.

As mentioned in chapter 2.1.5, Louis Vuitton is the third favourite luxury handbag brand in Geneva. 35.8% of women who participated to the surveys own at least one Louis Vuitton bag. 20 years ago, the brand was second with 26,4% of women owning a Louis Vuitton.

Mrs. Sophie Le Van, manager of the watch and jewellery, as well as leather goods department agreed to participate to the interview. (Appendix 3 and 7) The method was the same as for the previous interview, but the discussion was divided into four categories (Before starting the interview, she was introduced to the topic, and the same way it was proceed with Longchamp, the discussion was then split into four categories.) The first one focused on her to provide a sample of her natural tone of voice and way to express herself in order to be able to analyse the rest of the exchange in an objective way.

The second part was about the image of Louis Vuitton. The image of Louis Vuitton is based on its ability to maintain its quality and the capacity to renew itself and surprise customers. Therefore, according to Mrs. Le Van, the most representative value of Louis Vuitton today is: the client. She even said that what the brand values most is to have satisfied clients. Its mission is to surprise them and to go beyond their expectations. Mrs. Le Van explained that the founders of the brand were pioneers and already acknowledged the importance of loyalty of a satisfied consumer. In addition to the particular care they have for their customers, Louis Vuitton has a unique savoir-faire, the brand has managed to preserve its heritage and shows a dynamic engagement. Unlike its competitors, Louis Vuitton is not only in the leather goods industry, it also provides items for the silhouette of men and women. Therefore, Mrs. Le Van thinks that Louis Vuitton is ahead compared to other luxury brands that are starting now to create “ready-to-wear” collections to their luxury brands. As a matter of fact, Louis Vuitton has already been taping into this market for the last 20 years. Nevertheless, leather goods remain the heart of Louis Vuitton’s work.

Regarding customers’ evolution, the brand does not target one specific type of customers. According to Mrs. Le Van, there is no perfect client and that all customers are important. Mrs. Le Van explained that, when a popular brand like Louis Vuitton decides to desacralized its products it takes a risk that will bring many positive impacts for the brand, but it will also bring new types of customer that are not especially positive

for the brand's image. The brand is not afraid to use the term "democratization". Louis Vuitton's clientele is international: 40% of the clients who visit the store in Geneva belong to this international clientele. The biggest change regarding consumers is that clients have become more aware of the brand, and therefore have higher requirements, and sharp expectations on the quality and trends. For instance, some customers care about the sustainable management of the brand, they want to know the origin of the leather used for their purse. Another example of their increased requirements is that some customers want to personalize their handbags. Therefore, Louis Vuitton provides a service that personalized the handbags with the initials of the client. The last point about customer's expectations is the bag's visual impact, which means that women wearing a Louis Vuitton handbag want it to be recognized. However, the brand sees this change in a positive way. Indeed, the store manager stated: "It is proof that Louis Vuitton is a house that is highly capable. Despite 160 years of performance and experience, the house is always able to renew itself. It is very positive."

Louis Vuitton has more than 5'000 references of handbags, but when asked "Which model of handbags do you sell most?", Mrs. Le Van spontaneously answered "the Speedy monogram" and "the Neverfull".

Figure 8 – Louis Vuitton's Best Seller: "Le Speedy Monogram" and "le Neverfull"



(Vuitton, sans date)

Mrs. Le Van explained that most of the « iconic models »²³ are very appreciated by customers. The speedy monogram (see first picture of Figure 8) belongs to the iconic references. This bag was launched in the 1950's and was responding to a specific demand at the time of its creation; women desired a practical bag for the city. Its design

²³ The iconic models represent the handbags with the "Damier" design or with the exposure of clear LV logo.

bears resemblance to a small piece of luggage. The price of such a handbag depends of its size, but stays under CHF 1'000. It was already Louis Vuitton's best seller before the Neverfull was created.

The Neverfull (see Figure 8, second picture) is a relevant example of the evolution of bags in history. Once again, Louis Vuitton created a bag that matches a specific need. Active and modern women of the 21st century desire a light functional handbag. This is why the Neverfull was launched in 2009. Flexible and structured at the same time, this purse has turned into a timeless bag perfectly adapted for the city. A medium-sized Neverfull is about CHF 1'000.

One of the most important achievements of Louis Vuitton seems to be its ability to keep its prestigious status as well as the interest and desire of the customers, despite its impressive popularity. Louis Vuitton did not hesitate to democratize its products in order to improve its turnover. The small company created in 1854 turned into an international leader of the luxury industry. The firm even changed the way luxury is perceived today by increasing the supply of luxury handbags and making their products more accessible. (Thomas, 2007).

2.2.4 Céline

Céline is a luxury French fashion house. The brand was founded by Céline Vipiana in 1945. Since 2008, the house is run by creative director Phoebe Philo. Céline is covering many areas in the fashion industry. They design ready-to-wear clothes, accessories, and are also famous for their leather goods and shoes. The particularity of Céline's items is that they are all crafted to be beautiful. Above all Céline wants its product to have a practical aspect without any artifice. The brand has 140 stores established in the world. (LVMH, 2017)

According to survey 1 and 2, this brand did not rank very high in popularity. This might come from the fact that the brand did not appear in the multiple answer question. However, the brand has been mentioned several times in the category "other". In survey 1, 13,5% of the women said that they own at least one Céline handbag. As for survey 2, it is 5,6% of the women. The percentage has more than double in 20 years. Mr. Guybert confirmed the impressive evolution of Céline during that period of time and exposed some of the major changes the brand went through.

Céline used to have no particular interest in customers, as it was just a classic and simple brand. Today, the image of Céline is rather elegant and feminine, but very minimalist. Its new image is the result of two major changes. First, the partnership with

Michael Kors: he was highly interested in giving value to accessories and handbags. He has improved the luxurious aspect of the brand. The second change came with the arrival of the new creative director: Phoebe Philo. She arrived at the company in 2008, she developed the image of Céline, and gave this elegant and minimalist aspect to the brand. The simplicity of the brand is well expressed through its moto: *“less is always more”*.

Not only Céline’s image changed, but so did its clientele. They went from a simple and classical type of customer to a more modern, young and independent type of women. In addition, the clients are more reserved, they completely rely on the brand. However, Mr. Guybert pointed out that even though this is a fact, everyone is welcome, and Céline is always happy to win more customers.

The last topic that was discussed with Mr. Guybert was the sales. He spontaneously shared that since 2010, the sales have massively increased, and that the brand is gaining a strong brand image. He also said that it was probably no coincidence that their best seller, the “Luggage Nano”, is a product created in 2010. This product is connected to the new image of the brand and it is what customers like about it.

Figure 9 –Céline’s Best Seller: “Le Luggage Nano”



(Instantluxe, 2017)

The Luggage Nano was launched in 2010, it is available in various material, like regular leather, python skin or crocodile. The price depends on the material used. For a simple design in leather material, the bag cost about CHF 2’000, and for one in python’s skin, it goes up to CHF 4’300. This bag has a high capacity, and is convenient for an everyday use. It thus matches women’s daily needs for a handbag.

For the last 10 years, Céline has been through many changes, and has managed to improve the image and perception of its brand. They went from a “plain” company with nothing particular to a successful company, well known, and highly appreciated by customers. In 2011, Bernard Arnaud commented the brand’s economic situation, saying that Céline had improved its revenue by 16%. (Seidler, 2012)

2.2.5 Comparison of Longchamp, Louis Vuitton and Céline

The three interviewed brands are competitors: they play in the same market. Even though Louis Vuitton and Céline are under the same group (LVMH), they do not have the same strategy nor the same approach with their customers.

The three interviews did not unfold the same way. In general, they were all good quality interviews, and all interviewees agreed to talk about every topic they were asked about, beside the sales performance of their stores. Mr. Mazzotti and Mr. Le Van clearly know how to express themselves. They even provided more information than what was actually requested. They were able to develop their ideas well, and according to the map of empathy, they followed the thread of the discussion, as planned. However, the interview with Céline was more challenging. Mr. Guybert seemed nervous during the entire interview, and mostly provided short answers. It was necessary to ask additional questions after each one of his comments, in order to challenge its spontaneity and to obtain some clarifications. This difference in communication can be explained by the position the interviewees hold inside the store. According to the description of their functions, Mr. Mazzotti and Mrs. Le Van are more used to interviews than Mr. Guybert, who mostly focus on sales.

Table 2 – Results, Comparison of Longchamp, LV²⁴ and Céline

	Longchamp	Louis Vuitton	Céline
Image, values	90’s: handcraft and expertise in leather goods. Now: handcraft and expertise in leather goods & communication.	90’: Handcraft experts, preserved heritage, focus on customers. Now: handcraft expert, preserved heritage, focus on customers, and dynamic	90’s: Simple & Classic. No particularity. Now: Elegant, feminine, and minimalist.

²⁴ LV stands for Louis Vuitton

		engagement with modernity.	
Clientele	90's: Wide demography of consumers Now: Wide demography of consumers. Loyal to the brand, looking for a good quality/price ratio handbag.	90's: Limited customers, mainly rich customers. Now: international.	90's: Classic Now: Modern, young and independent women.
Production	Increase	High Increase	Increase
Sales situation	Increase	Increase	Increase
Best Seller	Entry level handbag	Entry level hand bag	Average Handbag

Regarding the image and values, Longchamp and Louis Vuitton empowered their original value and evolved with the new trends of fashion and communication. Céline had a different evolution. The brand completely changed, rebuild its image, and now shares new values.

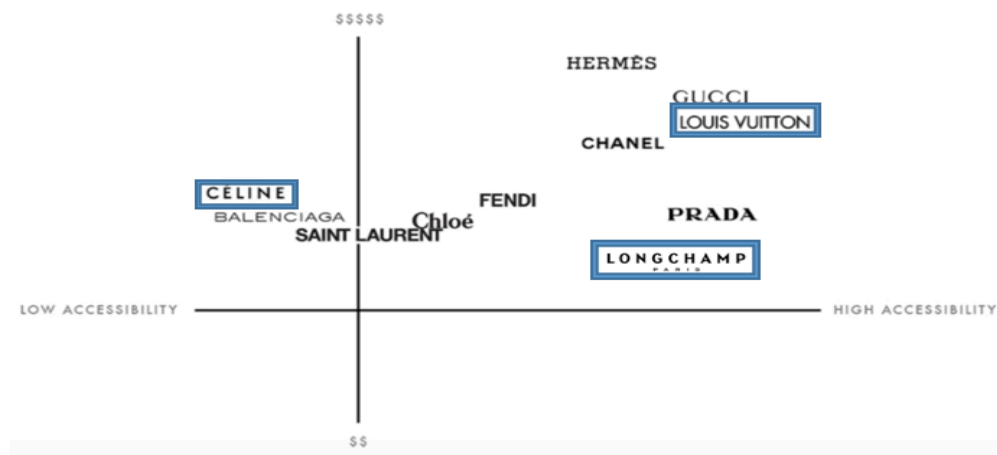
The same phenomenon happened to Longchamp's customers. Longchamp already had a large demography of customers, and on this base, the customers evolved and became more loyal to the brand. Regarding Louis Vuitton, customers were mostly rich people. Now the customers are mostly international, and not necessarily rich. Finally, Céline has the biggest changes in the evolution of its customers: they went from a classic clientele to a more modern, young and independent type of clientele.

When comparing the productions and sales, all of the brands have recorded an increase. They produce more and therefore also sell more.

In General, Longchamp, Louis Vuitton, and Céline do not have the same positioning in the luxury market. In terms of democratization of luxury, two aspects are mainly

important. The price of the products is an important factor to define if people afford the items? The second factor is the accessibility of the product in term of distribution. The figure 10 below compares the luxury brands in the luxury market according to the two factors previously mentioned. Comparing the three interviewed brands, Louis Vuitton is the most accessible, and most expensive of the three. Céline is the less accessible, and a moderately expensive brand. Finally, Longchamp is, like Louis Vuitton, a very accessible brand, but is the less expensive of them three.

Figure 10 – Current Positioning of Luxury Brands



Adapted version of: (Portfolios, 2017)

Their bestsellers are the best example of the democratization of the brands. Longchamp and Louis Vuitton, both have a purse that is in the most accessible range of price. Only Céline, that benefits from a lower popularity, has a bestseller in the average price of the brand.

Based on these results, Longchamp and Louis Vuitton had a similar evolution. Even though they are not comparable in terms of content²⁵, they evolved the same way: they empowered the essence of their brand. The two brands did not change, unlike Céline that when through a complete make over.

2.2.6 How Luxury Brands Democratized Luxury

The data collected through the surveys show that there is a phenomenon of democratization. Two decades ago, luxury was a business exclusively accessible to the wealthy.

²⁵ By content it is meant: pure type of products, image, target people etc.

The interviews with luxury brands' representatives indicate that the average customers of luxury brands have changed. Nowadays there is a younger category of consumers, which represent women aged of 25-30 years old and belonging to the middleclass. As the anonymous author mentioned in his article about mass communication, the luxury market has changed its target consumers (Friendly-agency, 2016). This idea is conveyed by the interviews on the evolution of the brand.

This change has been induced by luxury brands themselves. The brands have been working on making luxury accessible to everyone (at least partially). As mentioned in chapter 1.3, they have created cheaper products like perfume and cosmetics to attract new consumers to the brands, and they designed handbags with new materials that are less expensive (Thomas, 2008).

Luxury brands also capitalized on the influence of mass media. They used celebrity marketing through television, radio, newspapers, internet and social media. For example, Dior tried to give a younger image to its brand with Kendall Jenner, a 21-year old woman very active on social networks and currently one of the most popular models in the world. Choosing her to parade on the catwalk attracts young women who identifies with her, and thus with the brand (Média, sans date), (Friendly-agence, 2016).

The phenomenon of democratization of luxury is the consequence of changes in the marketing strategies of luxury brands (Kapferer, 2015). These changes are closely linked to the brands' desire to increase their production. As mentioned in chapter 1.3, luxury goods used to be unique and rare, produced in a limited quantity. Most artisans had a small workshop where handmade goods were produced. Therefore, the supply was limited and only rich people could benefit from such extraordinary items. However, several decades ago, luxury brands entered the "mass-prestige" market (Thomas, 2007). This is a new term used to designate luxury brands that are producing in mass for all type of consumers while retaining the prestige of being part of the luxury industry (Thomas 2007). At its origin²⁶, the production of luxury handbags was limited because it was handmade. It took longer to produce the good, but it was a proof of the designers' engagement, and of the quality of the product (Thomas, 2008). Today, "mass-prestige" means that luxury brands like Louis Vuitton no longer make handmade purses. Instead, they have industries producing massively with sewing machine (Thomas, 2008).

²⁶ The origin is proper to each luxury brands and to their date of creation.

Originally, luxury brands were specialised in one good and they made it perfectly, in a low supply. For instance, Chanel used to make only hats, Louis Vuitton was specialized in luggage and Burberry in rain coats. Within the last fifty years, luxury companies turned into billion dollars' companies. Today, they no longer produce one specific item. Each brand sells everything. A luxury brand can sell Leather goods items, ready to wear, accessories, cosmetics and shoes. It is not about the good itself and its quality anymore, it is about the relationship between the brand and the consumer (Granot, 2013). Luxury brands now try to sell the image of a luxurious life style instead of luxurious goods (Fashionbi, 2017).

Many brands of luxury handbags have outsourced their production to produce more and to supply a better quality leatherwork. One of the most famous luxury brands, Louis Vuitton, outsourced part of its production to Romania, China and Spain. The firm motivated its decision through several reasons, but the most obvious one is the reduction in labour costs. However, Louis Vuitton's customers do care about the provenance of their bags, as it is expected of a luxury item to be "made in France". Therefore, companies that outsource their production to produce more ensure that the final assemblage of the bag will be realized in France, in order to benefit from the "made in France" label. Although this legal trick works, it may still affect consumers' faith in Louis Vuitton. ²⁷

Luxury brands disregard the rarity of their products by increasing production (Bastien, Kapferer, 2009). However, this is how these firms have massively improved the power of their brands and created a new luxury market (Bastien, Kapferer, 2009).

The abandon of rarity is explained by several factors. The most relevant argument is that the number of rich people on the planet is drastically increasing. The brands thus seized the opportunity to produce more for slightly cheaper, thus increasing their profit (Bastien, Kapferer, 2009).

2.2.7 The Impact of Democratization on the Luxury Brands

The phenomenon of democratization of luxury handbags is the direct consequence of the strategies followed by luxury brands (Thomas, 2007). By changing their production to make luxury items more accessible to the mass, luxury brands have increased the interest of the middleclass for their products. However, the brands' desire to widen their

²⁷ All the content of this paragraph is taken from (Dai, sans date).

attractiveness beyond the upper classes also has negative effects on the luxury industry.

These changes have modified the behaviour of luxury consumers. Women have changed their expectations regarding luxury brands. They have lost their primary interest for luxury handbags, which was looking for a high-quality product. At the time luxury brands were created, customers were purchasing these brands for their high level of quality. Today, the attitude is not the same. Even though women are still looking for quality, they highly care about the brand image and its visibility. What women are targeting now is a handbag that is rapidly related to a luxury brand. This desire to own a luxury bag has less to do with the quality of the product than with the visibility of its logo, which makes it identifiable as a luxury item. The new generation of luxury consumers cares more about other people noticing that they wear luxury, and is ready to spend more money for that purpose. This attitude led to a game of power and appearances.

Another consequence of the democratization of luxury handbags is the lack of loyalty of consumers towards a brand. Luxury handbags used to be timeless (Thomas 2007). Nowadays the market evolves in the same direction as the fashion industry, with momentary and seasonal trends evolving quickly. The consumers' desire for change has led to the development of a second-hand market. As women want to change their purses regularly, Internet platforms and luxury second-hand shops enable them to sell and buy used luxury handbags easily. This system allows women to sell their luxury purse, get some money back, and buy a new one. On the other hand, women buying a second-hand luxury handbag have the opportunity to own a real luxury good for a lower price.

Moreover, as consumers tend to care less about the quality of luxury goods, luxury brands with mass production have become the victims of the counterfeit market (Thomas, 2007). As luxury bags are easily recognizable on the outside, they are easily imitated. However, even though from the outside, the illusion works, most of the time the difference between a real luxury handbag and a counterfeit can be told by looking directly inside the purse. This is a way for the luxury brands to protect themselves and still being able to legitimate their original products. Of course, the counterfeit market in parallel of the luxury industry represents a loss for luxury brands. In 2013, the world wide value of personal luxury goods was: 217 billion Euros (Statistica, 2017) and the counterfeit market was worth: 407 billion Euros (Retaildetail, 2016). This market is enormous. However, this amount of € 407 encompass the total counterfeit industry not

only the personal luxury goods. This well developed counterfeit market represents a danger for the luxury industry. Why would consumers spend a great deal of money on an authentic luxury bag, when they can have an identical product at a small price? Some consumers rather pay less for a counterfeit that will look identical to the original luxury product, than to spend four time the price for the real good, since in the end, they both benefit from the name of the brand.

Despite the negative aspects of the democratization of luxury mentioned above, ultimately, it still massively increased the sales and benefits of luxury brands. Luxury brands have turned from small artisanal shops into billionaires' companies (Thomas, 2008).

3. Discussion

So far, two kinds of results have been obtained. The surveys and analyse of the graphs in Appendix 9 prove that the phenomenon of democratization of luxury handbags is real. The number of women that value luxury handbags over not branded handbags has massively increased. It has been noticed that there are no stereotypical customers: it concerns people with all kinds of salary and of any age.

The second results were based on the impact of the phenomenon of democratization, and on new data collected through interviews with various companies in the market of luxury handbags. These interviews have been analysed with the empathic map in order to understand all the emotional aspect of the answers provided by the interviewed, and to perceive the genuine meaning behind the words they used. In general, these interviews showed that most of the brands are happy with their customers, and with the new market they have entered in through democratization.

These interviews led us to conclude that the phenomenon of democratization comes from the luxury brands themselves. Even though it can generate a negative impact such as counterfeit or loss of loyalty from very rich consumers (due to change of perception), luxury brands do gain more by mainstreaming certain luxury goods. By changing the way luxury brands are interacting with its customers, and by making luxury brands accessible to more individuals, the industry of luxury entered in a new era of luxury called “new luxury”.

3.1 The New Luxury

According to our study, it is clear that luxury has evolved and that luxury as it used to be has changed. Luxury consumers are not necessarily looking for something rare and exclusive anymore. They would rather purchase cheaper, but more luxury handbags and identify to a trend, a mass movement, although many other women might own the same item. According to many brand analysts like Jean-Noel Kapferer²⁸, luxury in the 21st century is called “new luxury”. Various terms fall under the umbrella of new luxury, such as “affordable luxury” (Kapferer, 2015), “mass-prestige” (Thomas, 2007), etc.

²⁸ Jean-Noel Kapferer is a brand analyst, and a leader in brand management. (Page, sans date b)

The results from the survey in chapter 2.1.5 show that the new customers of luxury handbags belong to the middleclass²⁹. This societal class will opt for a luxurious life style. The survey revealed that women from the low middleclass own many luxury handbags and that the average salary of someone from this class is about CHF 5'000. Two of the interviewed brands showed that their best sellers' price ranged between CHF 1'000 and CHF 2'500. Therefore, we can observe that this societal class will opt for a luxurious life style – one luxury purse corresponds to 20% to 50% of their salary.

When comparing this with the evolution of the handbags price. It is noticeable that the price of handbags has slightly increased. For example, when looking at the origin price of "The Epi Leather Neverfull" of Louis Vuitton. This handbag was launched in 1985 with a price of CHF 1100. It represented 22% of the salary of a low middle class women. Today this model is sold for about CHF1900. Which represent 38% of the salary. These statistics show that luxury was more affordable 20 years ago. However, the phenomenon of democratization was not important at this time and women care more about luxury handbags in 2017. Within 20 years, the price of handbags seems to have increase (probably related to the inflation and a price modification from the brands). These changes in price take off 16% more of the salary of a low middle class women in 2017 than 20 years ago.

These women like wearing luxurious brands better, however, they value the quantity rather than high-quality. According to the results in Appendix 9, in 2017, 37% of women have between half and the totality of their purses coming from a luxury brand; compared to only 12% 20 years ago. Moreover, women are more attracted to American luxury brands like Michael Kors and Calvin Klein that are new luxury brands and less expensive than the older brands existing since the 18th century. Although they belong to the old luxury brands, brands like Longchamp are very appreciated because they also belong to the category of affordable luxury handbags. Nowadays, consumers privilege cheaper luxury brands which allow them to purchase more luxurious items and increase their perception of living a luxurious life style.

Michael Kors and Calvin Klein are the proof that some brands can make it in the world of luxury without necessarily having historic origins. Jean-Noel Kapferer mentions this: "American brands are new in the industry of luxury and they've rapidly succeeded on

²⁹ The term middleclass is for High and low middleclass (Low middleclass = people that earn less than CHF 5'000) and (high middleclass people that earn between CHF 5'000 and CHF 10'000).

the luxury market without conforming to the rules of patrimony and history. Some examples for this trend are Ralph Lauren and Calvin Klein” (Kapferer, 2006).

Nowadays the luxury market is highly trendy which explains the apparition of many terms to refer to and define luxury today. According to Jean-Noel Kapferer and Vincent Bastien, these new terms are only confusing consumers. They go even further, saying that labeling a product « luxury » helps increase sales. What has changed between the old and the new luxury is the connection between the brand and the consumers. New luxury is about the relationship between the product and the customer more than just the product itself.³⁰

As mentioned above, the trends defined as “new luxury” are: affordable luxury and mass-prestige. Affordable luxury is mostly what middleclass women look for. Affordable luxury handbags are luxury products, as they are attached to luxury brands. However, even though they cost more than a regular purse, they are still considered cheap on the luxury market. They correspond to widely accessible entrance products to get consumers a taste of luxury (Dumbre, 2015). In other words, affordable luxury handbags are purses that provide its consumer with the feeling of buying a luxury good. Compared to a basic unbranded purse, those purses are expensive.

Mass-prestige is also a “new luxury” trend and it is also known as “mass luxury”, “opuluxe”, or “Mass-tige” (Bastien, Kapferer, 2009). It corresponds to a new phenomenon that started 20 years ago, due to a change in production, when luxury brands tried to increase their profit by reaching a larger public. (Bastien, Kapferer, 2009). “Mass-prestige” refers to luxury items that are created in series, or in large quantity in order to be massively sold. Bastien³¹ and Kapferer agree in their book “Luxe oblige” to qualify this term as an hybrid of luxury created by the middleclass. The products belonging to mass-prestige are more accessible than any other luxury items and their aim is simple: they are used to improve the image of the people wearing them (Bastien, Kapferer,2009). Therefore, they have to be easily recognizable. These products are designed with clear symbols or evident logos (Thomas, 2008).

Figure 11 – Examples of Mass-Prestige Handbags

³⁰ All the content of this chapter is taken from: (Bastien, Kapferer, 2009).

³¹ Vincent Bastien is a French business man. He wrote several books about luxury and branding. (Ikones, 2015)



(Pinterest, 2017 a)



(Pinterest, 2017b)

For instance, the “LV” sign or the squared pattern are easily recognizable and identified as Louis Vuitton, even though the name of the brand is not (fully) mentioned. Another example is the golden lock and/or the initials “MK” visible on all Michael Kors bags.

Nevertheless, new luxury is a market that knows how to adapt itself. The luxury brands play with mass-prestige to reach a high number of consumers and increase their benefits. However, each brand keeps some unique and extraordinary luxurious items to satisfy its rich clients, who do not want to be associated with the mass. Luxury items affordable only to wealthier customers do not need to have explicit logos or a recognizable design. For rich consumers, luxury still matches the definition of rarity and excellence, and it is not associated with quantity but quality.³²

3.2 Recommendations

As mentioned in the introduction, the democratization of luxury is a phenomenon stemming from a desire shared by both the consumers and the brands. By creating a luxury that is more accessible, the brands have increased their profits and have also allowed new consumers to afford these new luxury goods. However, if everyone can afford luxury handbags, the dream that used to be associated with this industry might disappear. The risk is that people from the middleclass stop buying from a brand because it has become too common, and that they no longer associate the brands to luxury. It would affect the luxury companies. In the same way, if the rich consumers associate the luxury brand to a lower social class it might also affect the revenue of the brands. Therefore, my recommendations for the luxury brands are that they should provide ideas on how to keep the positive aspect of the phenomenon of

³² All the content of this chapter is taken from: (Thomas 2008).

democratization and to diminish the negative aspect, as it will be explained in further details.

3.2.1 Recommendation number 1: Luxury Must Absolutely Keep the Prestigious Aspect of Their Brands.

Two ways can be used to succeed in this task. The first one is to reinforce the dream around the products and the brands. The brands can team up with trendy creators to launch a collection, and they must keep using premium quality raw materials as the quality of the products remains highly important for the customers in the luxury industry. To keep its clientele, the brands must make them dream of owning its products. If the customers are ready to pay higher prices for handbags, then the bags have to be made out of premium raw material.

The other way to keep the prestigious aspect of a brand is to show inspiration and transmission of heritage. By heritage, it is not meant the creation's date of a brand and the transmission of the company to the next generation. What matters here is the transmission of knowledge, skills and savoir-faire acquired from the beginning of the brand.

3.2.2 Recommendation number 2: creating a particular universe for each brand that reflects its own personality.

Creating a particular brand identity can be achieved through advertising in partnership with celebrities that agree to associate their image to a brand. By acting this way, companies may have the opportunity to be associated with a current celebrity which will keep the brand's image young.

The store itself can contribute to the creation of a universe for a brand can also be done in the store itself. When a customer enters a luxury shop, he expects a luxurious experience. The way he is welcomed, the atmosphere, etc. all play an important role, and can be developed and put forth in many ways. There are many options depending on the environment that the luxury brand wants to create. To create an environment, a luxury industry can play on the following aspects:

- Furniture: the choice of furniture and the colors of the store will directly create an atmosphere. Selecting white furniture with white floors and walls can give a modern look to a store. Selecting gold, ornate furniture and decorations with warm tones of colors can give a more traditional and luxurious aspect to a store. Finally, black color can give a trendy aspect of the store.

- Visibility of products: it is a choice to make, showing all the products or selecting only some. The location of each product is also important. When entering most luxury shops, the first area seen is the handbag section.
- Scent: scent can create an atmosphere. For example, by selecting a perfume that represents the smell of leather, you can create the right atmosphere for high quality leather goods.
- Sounds: sounds can also be used to awaken your senses and affect your mood. Playing the right kind of music to create the desired atmosphere, will give the customer a positive feeling during his shopping experience.

3.2.3 Recommendation number 3: regulate mass production.

Luxury brands are constantly trying to produce more and more to reach new consumers through new strategies. The fact is that with all these new luxury brands developing, consumers do not build a loyal relationship to any of them. Customers go where the trend leads them. In addition, if the brands are too accessible, there is no limit between luxury goods and other nice to have goods. If something remains constant between old and new luxury, it is the fact that the luxury must make people dream. As aforementioned in recommendation 1, customers should ideally dream about the products that the brand offers as something hardly accessible. If everyone can have it, where is the dream? The final part is, if people no longer dream about owning luxury goods, they will stop buying them and there will be a huge loss for luxury brands. Therefore, this recommendation is about how to moderate the negative impact on the brands.

Luxury brands must be careful, and not reach the point where mass marketing will lose its interest to consumers. Because in the end what women want when they purchase a luxury bag, it is not a luxury bag that says “affordable for all”. In other words, even if highly increasing the profit of the brand is attractive, the luxury companies have to regulate the production of mass product, this way it will not go out of control.

Additionally, most of the brands that have mass-prestige products also have a large range of luxury products that better reflect the true values of luxury. This is the kind of product that real rich people purchase. They are usually more discrete than the mass product. However, if the explosion of mass-prestige on certain goods is too big, the wealthiest will no longer want to purchase goods from these brands because they will not want to be associated to mass-prestige. As Mr. Mazzotti said, the handbag “le Pliage” is the best seller of Longchamp in terms of quantity, but not in terms of

revenue. This is why the real challenge for luxury brands is to make sure they do not lose their old, faithful customers by trying to seduce a large number of women from the middleclass that show little loyalty for their brands.

3.2.4 Recommendation number 4: Keep the same communication for all the customers.

If the company is producing mass-prestige and regular luxury items, it is important for the luxury brand not to dissociate the message they deliver about each product. Having one type of message creates a sense of unity and groups every type of consumer under the umbrella of “consumers”. There is no differentiation. They are all clients of the same brand. In addition, a woman from the middleclass purchasing a mass-prestige handbag will feel like she has chosen this item because she wants this particular product, not because she can not afford other handbags. If the brand starts to adapt its message for the middleclass and for richer consumers it may affect both classes. The women from the middleclass might feel offended because they would feel excluded from the original brand and women from the richer class will lose interest for luxury brands that has adapted itself to the middleclass. It will give the impression to the rich consumer that the brand has lowered its quality in order to match other customers’ needs and wealthy people will not appreciate to be associated to a brand that plays on both sides. Therefore, keeping the same message for both types of products is a way to keep a high-end image of the brand, and the richer people will not necessarily feel affected by the brand producing these two types of goods.

3.3 Limits of the Study

Through all the steps necessary to realise this study, here are the factors that could have affect the objectivity, and the evolution of the research.

In the first part, related to the surveys (explained in more details in chapter 2.1.3) (because it was important to rebound on the issues in order to improve the collection of surveys), depending on the people that agreed to answer the questionnaire, and the ones that refused to participate, the result of the surveys were potentially affected. However, in addition to what has already been talked about, distributing surveys on the street, and spreading the survey online could have affected the answers. When directly asking people on the street, it is possible to unconsciously pick women that could best fit the surveys. Regarding the online survey, we could not select the candidates. Once they were online, it was not possible to check who was participating. In addition, if someone did not understand a question, she could have answered the opposite of

what she actually believes. This is something that frequently happened on the street: women asked for some clarification about the meaning of some words.

A series of factors could have affected the second part of the study, related to the companies. First, the way the questions were expressed. The way the questions were formulated could have influenced the answers of the interviewed person. It was hard to formulate questions in such a way the person would answer them freely, and still obtain relevant results. The questions should lead the person to develop an opinion about a topic, but at the same time, there are some words that had to be avoided in order not to offend the interviewed person. At any time, the person participating in the interview has the right to decline the question if he/she feels that the question is inappropriate, and may divulge private information that could tarnish the company's image. It happened in this study. The word "democratization" has been avoided, and all the speakers refused to talk about their sales.

Secondly, the map of empathy method used to analyse the interviews could have influenced the analysis of the answers. Some people are naturally more nervous than other when talking in public or with strangers. This nervousness could be associated to the topic the speaker was talking about, when it actually was just regular nervousness, or a twitch. Even though the interviewer tries to reduce this inconvenience, this reaction cannot be controlled. This situation happened during the interview with Céline, in the end, it was difficult to know if Mr. Guybert was just nervous or if he was not sure about its answers.

Another limit of the study is the reluctance to answer open questions with answers such as "we don't know", "no opinion". With such answers, companies' representatives can bypass uncomfortable questions. This creates a lack of data on certain questions. However, this issue was addressed through the method of empathy. During the interview with Céline, Mr. Guybert reply to some of the interrogations in this way. When he was asked: what are the values of Céline?" He first suggested to have a look on Wikipedia to find the answers. However, after some insistence he provided an appropriate answer.

In general, the quality of the interview also had an influence on the data collection. From a personal experience, the interview with Longchamp was the most satisfying. Mr. Mazzotti answered 90% of the questions and developed his answers a lot. Compared with Céline's interview, the latter was highly frustrating. Mr. Guybert did not naturally reply to any of our interrogations, and he never developed his ideas. It

affected the course of the interview, because all the interviews were framed with necessary and complementary questions. Nothing was spontaneous with him.

Finally, the number of people that have been interviewed on the street. 220 women participated to the consumer surveys. However, even though this number of participants was enough to establish a solid analysis, a bigger sample would have made the results more accurate. Nevertheless, to obtain more questionnaires, it would have required more time on this matter.

Still regarding survey 1, the locations where the surveys were distributed had an influence on the final result. The places that were chosen were all in the centre of the city. In these area, it was most likely to meet women from the middleclass. Other places like the area of Champel or the Lignon, where women from complete different social classes could have been met, would have provided different results. However, it was a personal choice to select this places, because according to the first literature review, it was the most affected class by the democratization of luxury.

Secondly, the impact of the phenomenon of democratization has been established based on the three conducted interviews. This sample's size is problematic. The information had to be completed with books and information research. It was hard to evaluate the impact on an entire system based on a small sample size. In addition to the three interviews recorded, seven other luxury brands were asked to participate. Since they refused the interview, it was no longer a personal choice to pick who was going to answer the questions. Probably that if some other brands had participated, it would have provided a deeper insight about this matter, interviewing other brands with a different market positioning would have provided a different point of view.

4. Conclusion

It has been very interesting to immerse myself into the world of luxury brands and of consumers habits. Each step helped me to have a deeper understanding of the research I was conducting.

The present thesis is about the democratization of luxury. It has been conducted through 5 months and its aim was to determine whether there is a phenomenon of democratization regarding luxury handbags. In order to answer this question, a research was conducted in the City of Geneva. The research is divided in two parts. The first part of the research was a quantitative study of consumer habits in Geneva regarding luxury handbags which happened during the 3 first months of the research. It aimed at confirming or invalidating my hypothesis that there is a phenomenon of democratization regarding luxury handbags in Geneva. The second part of the research was a qualitative study based on interviews with luxury brands' representatives. Its aim was to analyse the impact of this phenomenon on luxury brands and see how luxury companies have evolved through the last 20 years, facing the democratization of luxury on the market of handbags.

For the first part of the research, a quantitative approach was used to conducted surveys on the street. After this first step, it was important to hear the point of view of some luxury companies on the evolution of their brands. Therefore, three interviews with luxury brands in Geneva have been conducted. Two out of three interviews represented the most appreciated luxury brands by women nowadays (according to the surveys). These interviews have been extremely interesting because they provided a different approach on the original hypothesis. Through these interviews it has been possible to establish the evolution of the image of the brands and the change in consumers' habits. However, the most interesting part was to realize that luxury brands mostly see these changes as positive.

To conduct the qualitative approach with the interviews the design thinking method was used. This method helped us to use a different method of analysis regarding qualitative data. As I said earlier, the luxury industry is a secret industry and luxury brand are completely in control of what they communicate on, in order to preserve the interest of the brand. Therefore, integrating the empathic map was the best way to dig deeper than just the words used. It was a way to analyse the feeling and thoughts of the interviewed person through was he said and did.

This aspect of the research was what I enjoyed the most because it enabled me to access a very restricted and secret world. It allowed me to immerse myself in a professional environment and to face the reality of the new luxury with passionate people.

The results of the first part of the research confirmed that there is a phenomenon of democratization of luxury in Geneva, and the second part revealed that the impact of this phenomenon on luxury brands is positive, and that it actually was the consequence of a marketing strategy from the luxury brands.

These results led to four main recommendations in order to keep this impact positive and to avoid the democratization to tarnish the image of luxury brands. It has been recommended to: keep the same communication for all customers, to regulate mass production, to create a particular universe for each brand that reflects its own personality, and finally to keep the prestigious aspect of the brands.

Thanks to this study, I have been able to compare the consumers' behaviour of modern women with the consumers' behaviour of women from 20 years ago. The evolution is impressive. The purchasing behaviour of women have radically changed within 20 years and luxury brands have known how to play with the desire of the new customers. However, this study was only oriented towards the luxury handbags market. All the research was organized in order to answer the initial hypothesis question. Now that this project has come to an end, it would be interesting to dig deeper to see if the democratization of luxury in general is ineluctable, and if it concerns all domains of the luxury industry.

To conclude the research on a quote from Hermès: "Luxury used to be ordinary goods for exceptional people, but now it can be defined as exceptional goods for ordinary people" (Som, Blanckaert, 2015, p 30).

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Appendix 1: Survey 1

1) Where are you from?

Switzerland Europe North America South America Africa
Asia

Oceania Eurasia

2) How old are you?

Less than 25 years old 25-30 years old 31-35 years old
 36-40 years old More than 40 years old

3) What is your profession?

4) What is your salary rank?

Less than \$ 5'000/months \$ 5'000-10'000 More than \$
10'000

5) Do you have luxury handbags?

Yes No

6) Based on the total amount of handbags you own; what % of luxury handbags do you have?

None Less than 25% About 50% 75%
 100%

7) Which Luxury brand do you have? (Indicate X: for the ones you have, 1 for the one you have the most)

Chanel Louis Vuitton Dior Gucci Michael
Kors

Burberry Hermes Longchamp Marc Jacob Other :

8) Do you regularly purchase new handbags?

Yes No

If yes, are they luxury handbags? (if you purchase luxury handbags AND no brands handbags check "both")

Yes No Both

9) How frequently do you purchase new handbags?

Every months Every trimester Every semester
 Every year Rarely

10) Do you remember at which age you bought your first luxury handbag?

About 15 years old In your 20s In your 30s More than 40 years old
 Never had

11) Do you think it is easier today to own luxury handbags than 20 years ago?

Yes No

Appendix 2: Survey 2

1) Where are you from?

Switzerland

Europe

North America

South America

Africa

Asia

Oceania

Eurasia

2) How old are you?

Less than 25 years old

25-30 years old

31-35

years old

36-40 years old

More than 40 years old

3) What is your profession?

From this point, we ask you to put yourself back 20 years ago and to answer as if you were back in 1995

4) What was your salary rank?

Less than \$ 5'000/months

\$ 5'000-10'000

More than \$ 10'000

5) Did you have luxury handbags?

Yes

No

6) Based on the total amount of handbags you owned; what % of luxury handbags did you have?

None

Less than 25%

About 50%

75%

100%

7) Which luxury brand did you have? (Indicate X: for the ones you have, 1 for the one you have the most)

Chanel

Louis Vuitton

Dior

Gucci

Michael Kors

Burberry

Hermes

Longchamp

Marc Jacob

Other : _____

8) Did you regularly purchase new handbags?

Yes

No

If yes, were they luxury handbags? (if you purchased luxury handbags AND no brands handbags check "both")

Yes No Both

9) How frequently did you purchase new handbags?

Every months Every trimester Every semester
 Every year Rarely

10) Do you remember at which age you bought your first luxury handbag?

About 15 years old In your 20s In your 30s More than 40 years old
 Never had

11) Do you think it is easier today to own luxury handbags than 20 years ago?

Yes No

Appendix 3: Qualitative interview Louis Vuitton

B) About you:

B1) Which position are you holding in the store or for the brand and what are your functions?

B2) Since when are you working for Louis Vuitton?

C) Image:

C1) What is the spirit of Louis Vuitton today? What are your values, vision and mission?

C2) In what way these elements are different from 20 years ago?

C3) In your opinion, what are the reasons of these changes?

C4) What is the image of Louis Vuitton you would like to convey to your potential customers?

C5) What aspect of the image of the brand have you seen evolved during the last 20 years?

D) Customers:

D1) Ideally, what type of customers do you target at Louis Vuitton?

D2) How was your targeted customers, 20 years ago?

D3) Concretely, what is the typical customer at Louis Vuitton?

D4) How did your clientele evolved during the last 20 years?

D5) How do you try to conquer new customers?

D6) how did your methods to approach new customers progressed?

D7) In your opinion are these changes related to a new type of customers of the brand?

D8) Do you positively see these changes?

D9) Do you have a typical standard of welcome at Louis Vuitton?

E) Sales:³³

E1) which model of handbags do you sell most?

What is its price?

E2) On a scale from 1 to 10 that would compare all your different handbags, where would you situate it ? (10 = the most expensive and the best quality)

E3) Do you have the information about the last two questions (E1 & E2) for the years 1990?

E4) In your opinion do you think that every woman deserves and should have a Louis Vuitton's?

F) Other:

F1) Is there anything that seems important about Louis Vuitton's evolution that you would like to add?

³³ The questions for Louis Vuitton are not the same as for Longchamp because Madam, Le Van said that she would not be able to answer questions about numbers and performance of the store.

Appendix 4: Qualitative interview Longchamp

B) About you:

B1) Which position are you holding in the store or for the brand and what are your functions?

B2) Since when are you working for Longchamp?

C) Image:

C1) What is the spirit of Longchamp today? What are your values, vision and mission?

C2) In what way these elements are different from 20 years ago?

C3) In your opinion, what are the reasons of these changes?

C4) What is the image of Longchamp you would like to convey to your potential customers?

C5) What aspect of the image of the brand have you seen evolved during the last 20 years?

D) Customers:

D1) Ideally, what type of customers do you target at Longchamp?

D2) How was your targeted customers, 20 years ago?

D3) Concretely, what is the typical customer at Longchamp?

D4) How did your clientele evolved during the last 20 years?

D5) How do you try to conquer new customers?

D6) how did your methods to approach new customers progressed?

D7) In your opinion are these changes related to a new type of customers of the brand?

D8) Do you positively see these changes?

D9) Do you have a typical standard of welcome at Longchamp?

E) Sales:

(If you do not have the exact numbers you can give an approximation in percentage)

E1) Can you tell me how many handbags you sold in this store in Geneva in 2016?

E2) Do you have these numbers for the year 1990? (or in an other Longchamp' shop in Switzerland)

E3) which model of handbags do you sell most?

What is its price?

E4) On a scale from 1 to 10 that would compare all your different handbags, where would you situate it ? (10 = the most expensive and the best quality)

E5) Do you have the information about the last three questions for the years 1990?

E6) In your opinion do you think that every woman deserves and should have a Longchamp's?

F) Other:

F1) Is there anything that seems important about Longchamp's evolution that you would like to add?

Appendix 5: Qualitative interview Céline

B) About you:

B1) Which position are you holding in the store or for the brand and what are your functions?

B2) Since when are you working for Céline?

C) Image:

C1) What is the spirit of Céline today? What are your values, vision and mission?

C2) In what way these elements are different from 20 years ago?

C3) In your opinion, what are the reasons of these changes?

C4) What is the image of Céline you would like to convey to your potential customers?

C5) What aspect of the image of the brand have you seen evolved during the last 20 years?

D) Customers:

D1) Ideally, what type of customers do you target at Céline?

D2) How was your targeted customers, 20 years ago?

D3) Concretely, what is the typical customer at Céline?

D4) How did your clientele evolved during the last 20 years?

D5) How do you try to conquer new customers?

D6) how did your methods to approach new customers progressed?

D7) In your opinion are these changes related to a new type of customers of the brand?

D8) Do you positively see these changes?

D9) Do you have a typical standard of welcome at Céline?

E) Sales:

(If you do not have the exact numbers you can give an approximation in percentage)

E1) Can you tell me how many handbags you sold in this store in Geneva in 2016?

E2) Do you have these numbers for the year 1990? (or in an other Longchamp' shop in Switzerland)

E3) which model of handbags do you sell most?

What is its price?

E4) On a scale from 1 to 10 that would compare all your different handbags, where would you situate it? (10 = the most expensive and the best quality)

E5) Do you have the information about the last three questions for the years 1990?

E6) In your opinion do you think that every woman deserves and should have a Céline's?

F) Other:

F1) Is there anything that seems important about Céline's evolution that you would like to add?

Appendix 6: Map of empathy Longchamp

Interview with Mr. Claudio Mazzotti.

SAY	THINK
<p>Longchamp is a luxury type store, with an amazing location here in Geneva. With luxurious facilities.</p> <p><u>About you</u>³⁴</p> <p><i>B1) Which position are you holding in the store or for the brand and what are your functions?</i></p> <p>My title is; store manager. I am supposed to take care of this store. Which means; deal with employees every day, follow what is related to the sales. I am also responsible of the stock and of the inventory. Everything that concerns the management of the store. What doesn't correspond to our tasks as store manager is everything that is related to a global view of the brand. We mainly focus on the aspect of the store. That's the most important.</p> <p><i>B2) Since when are you working for Longchamp?</i></p> <p>I entered 5 years ago.</p> <p><u>C) Image:</u></p> <p><i>C1) What is the spirit of Longchamp today? What are your values, vision and mission?</i></p> <p>I believe that there is a primordial one which is the hand-crafted aspect and the fact that we are leather producers, this is our main occupation. Everything that is connected to the fabrication of leather goods. All this handmade fabrication, the work of leather the experience acquired through the years is effectively what we value most. That's actually what differentiate ourselves from all the other brands.</p> <p><i>C2) In what way these elements are different from 20 years ago?</i></p> <p>I wouldn't say that they have changed. I rather say that they have been confirmed. But they didn't change, they didn't change. The advantage of this brand Longchamp (that belongs to the same family than the one who created it in 1948), is kind of original and particular in the commercial landscape nowadays. Nothing changed, it has evolved. Which means that effectively during all this time we had to acquire the experience in order to confirm it today. Maybe we are more confident about this values today than 20 years ago.</p> <p><i>C3) How did you differentiate yourself, compare to what you proclaimed 20 years ago?</i></p> <p>Like I said, I wasn't working for the brand 20 years ago. So I could hardly give you the orientation of Longchamp at that time but I don't think I am mistaking if I tell you that 20 years ago we didn't have the same desire to communicate. 20 years ago it was mostly distributed in multiband. It was a product that corresponded to a positioning. However,</p>	<p>B1) -</p> <p>C1) The way he insists on the way Longchamp does their bags that is very specific to them, it shows that he thinks that the brand does better than the others in this speciality.</p> <p>C3) Thinks that he doesn't know the answer for sure because he wasn't working for the brand 20 years ago.</p>

³⁴ text in blue and italic represent what I asked him.

<p>today we communicate, that's probably the main difference. The brand itself hasn't change, but willing to say it and to state it; yes.</p> <p><u>D) Customers:</u></p> <p><i>D1) Ideally, what type of customers do you target at Longchamp?</i></p> <p>That is something kind of vague. We can't say that we wish to target only one type of customer. However, we have an evolving clientele and that is divers. Because we have several products. For instance, we start with a basic product like "le Pliage" that everybody knows. These range of folding bags that are accessible at certain prices. It is not a low positioning; it is simply based on a good price/quality index. Through this product, we have a young positioning in the market, our bags are very present in the young community. They are already purchased by young women in high school. Yes, in high school already! It is our best seller so technically everywhere in the world. This is our best seller in terms of quantity because it is also the most affordable bag. This is an everyday handbag. It is really a handbag for every day, but its it a luxury everyday handbag. That's what's surprising actually. We start with very young girls, young women and then more mature women. We sincerely don't have only one type of customer. Well actually maybe yes, maybe there is something that could define our typical clientele, I would define it as a clientele that will be sensible to the price/quality index and particularly not ostentatious. Actually, I think that we have kind of a motto, that matches our last handbags. It is "luxury in intimacy". I think it corresponds quite well to our policy, we don't have a "show off" luxury, it is more a luxury that we keep to ourselves, because we know that our bags have been created by artisans. It is always build with a strong ethic and high quality of leather. I think that it is really what defines our typical clientele, the one that want to own luxury, the one that want to own a luxurious product, but not with the desire to show off.</p> <p><i>D4) How did your clientele evolved during the last 20 years?</i></p> <p>Inevitably, we tend more to luxury. With more complex items with higher prices. So, our customers, did they change? I think that they evolved. I think that Longchamp followed the evolution of its customers.</p> <p>That's it.</p> <p>Its always the same idea. The priority is to produce a quality handbag and not to produce it regarding of the demand. With quality, but also choices, a range and also some colors.</p> <p>Does it match your expectation for an answer?</p> <p><i>D5) How do you try to conquer new customers?</i></p> <p>Us as manager of the store, we are in charge to welcome and deal with the customers that will enter inside the store. Everything that is related to the communication is not related to our part of the work for Longchamp . So, to</p>	<p>D1) There is no typical Longchamp's customer. However, he thinks that some customers are more interested into some products than others. Some products are created to seduce certain customers. Therefore, there is not just one type of customers because there is not just one type of product. And finally comes back on its answer and says that there is something that connects all their consumers and that's the fact that they are sensible to the price/quality index. He also thinks that some of the handbags are luxury for everyday.</p> <p>D4) He thinks that the customers of the brand have evolved with the new orientation of the brand that tend more to luxury. But also that the brand has changed because of its new customers.</p> <p>It's a relationship between the brand and its customers.</p> <p>D5) He doesn't want to talk about the brand in general. Re-contextualize the question and answers about the store only. Thinks that to conquer</p>
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<p>conquer a new clientele, could be the kind of work that belongs to the members of Longchamp working in the offices in Paris. They will talk about the image of the brand, find some visuals, be on the social media. Etc.</p> <p>For us, in the store, the evolution is on the technics of sales. We are absolutely not in a “passive sale”. We are in a respectful sale and active.</p> <p><i>D6) what is an active sale?</i></p> <p>It means that we go ahead, we interrogate the customer, we try to understand what she is looking for. We seek for details. It is something that is done everywhere. However, we go very deep into details to establish a connection with the customer. That’s even something we practice between each other with the other members of the team. We attend trainings to learn how to practice that. We don’t want to simply wait for a customer to come to purchase. We want to be proactive, and to be able to understand what the customer want.</p> <p><i>D7) Do you positively see these changes?</i></p> <p>Of course, yes, yes of course yes! Because it is also a very interesting way to motivate our employees. Who is not only passive. Staying here in the store and waiting, knowing or not how to sell. That doesn’t mean anything today. We also need people that are, not only motivated, but also capable to learn new things and that are able to question themselves in order to change if needed. That is really motivating.</p> <p><i>D8) Do you feel like you (Longchamp) have wanted these changes or you have just followed a movement?</i></p> <p>Follow... yes, follow, but not in the negative way. It is not an obligation to follow. So yes, we followed a movement because we (I say “we” because I include myself in the team) are conscious that it is a primordial evolution. For our carrier and work, but its not... It is something initiated by the brand, it is certain! It must be done in a global way, for all the stores the same way. There must be the same welcoming everywhere, no matter where in the world.</p> <p>So we must develop these capacities. We must be surrounded by a team of workers that have the capacities to follow these evolutions.</p> <p><u><i>E) Sales:</i></u></p> <p><i>You mentioned, when arriving that you could not answered the questions about numbers. So I am trying to find which questions I can still ask you.</i></p> <p>Voila, we will see what we can talk about.</p> <p><i>E1) Do you see an evolution in terms of sales between today and 20 years ago? without providing me any numbers.</i></p> <p>Without a doubt, yes of course! that’s for sure. Obviously. First of all, 20 years ago, the distribution was only done in multiband. So, Longchamp intervned as leather goods producers and suppliers. They sold to retailers that sold to the final customers. Longchamp was not straight connected to its final customer. Today we still have this market yes, PLUS the market that is proper to Longchamp,</p>	<p>new customers it goes through a good welcoming and the evolution of the technics of sales. They use an active way of selling.</p> <p>D6) To him an active sale is interrogate the customers and see what he is looking for.</p> <p>D7) He thinks that working on the sale strategy is a good way to motivate employees. Its not only about following an evolution and satisfied customers. Its also about personal challenges for the team of the store.</p> <p>D8) He thinks that the word “follow” is inappropriate and moderate the meaning of the question. But generally he thinks that Longchamp followed the natural evolution because it is primordial do adapt itself.</p> <p>E1) There is a huge evolution in the sales during the last 20 years. He thinks that there is an evolution in the supply chain, Longchamp is now also directly connected to the customers.</p>
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<p>with the stores and that is growing all over the world. Inevitably, with these parameters plus the evolution of the price of the items, because they are more luxury oriented. So yes, there is an evolution of the turnover. We can even say an important increase.</p> <p>I think that it's exactly during the last 20 years that it highly increased.</p> <p><i>E1.1) you had a "BOOM" in your sales!</i></p> <p>YES! exactly it was the third generation of Cassegrain. So now it is the gran-son of the founder that is leading the company. He kept the company and make it evolved with more modern approaches. Maybe with different desires than what has been done before. He managed to start from what already existed in the past in order to develop the brand with new horizons.</p> <p><i>E2) which model of handbags do you sell most?</i></p> <p>Without a doubt "le pliage". Voila! in terms of quantity, it effectively the one. Its not necessarily the one that will bring the most in the final turnover of the brand, but in term of quantity yes, definitively. I believe that we sell one Pliage every 12 seconds in the world. The Pliage is really universal. And actually what is interesting is that, this bag exists for 20 years.</p> <p><i>Exactly 20 years?</i></p> <p>20-21... we went from small leather producers with this idea of foldable bags like an origami to an international development.</p> <p><i>What is its price?</i></p> <p>We have various price. It depends on the size of the handbag. It starts from CHF 60.- up to 150.- for the traveling bags. That is the highest price. Otherwise, to be more specific, the Pliage has different sizes and models. The best seller of Pliage is; the "shopping" model. Which is CHF 95.-.</p> <p><i>E4) On a scale from 1 to 10 that would compare all your different handbags, where would you situate it? (10 = the most expensive and the best quality)</i></p> <p>Yes, let me modulate this question. I am sure to know what you will think about it. It is not because it is more expensive that it is of a better quality.</p> <p>For the quality, we want it to be equal for all our bags. The difference is on the raw material used, the way it is fabricated. These are the factors that will indicate the price. More than the quality itself. So, a lower price doesn't mean a lower quality and a higher price doesn't mean a higher quality.</p> <p>Now, how can we position it...</p> <p>What do you exactly expect for this answer?</p> <p><i>Just to know if you would qualify the Pliage as an introduction to the brand. Is it an entry level product?</i></p> <p>Yes of course. It is an entry level product. It is the less expensive bag actually.</p> <p>But NOT the lowest quality. So yes it is our entry level product. Young women already wear it.</p> <p><i>E5) You told me that the Pliage was launched 20 years</i></p>	<p>E1.1) The gran-son of the founder managed to change the brand with his new desires and a modern approach.</p> <p>E2) The Pliage is the best seller, but only in terms of quantity. it was launched 20 years ago. And cost between CHF 60 and 150 .-</p> <p>E4) Thinks that there is only good quality at Longchamp, the price is based on the material used not on the quality.</p> <p>It is an entry level product.</p> <p>E5) He doesn't want to answer this question</p> <p>E6) He thinks that I</p>
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<p><i>ago, do you know 20 years ago when this bag didn't exist which model was the best seller?</i></p> <p>No, no... unfortunately, that, I don't know. I could not say, I would tell you absurdity.</p> <p><i>E6) In your opinion do you think that every woman deserves and should have a Longchamp's?</i></p> <p>That is a surprising question! is that a question of deserving?</p> <p>I don't know, is it for you, an item that every woman should have?</p> <p>So, let me ask you a question, do you think you deserve the pleasure to wear a nice purse?</p> <p><i>E6.1)Yes!</i></p> <p>There you go, you have your answer.</p> <p>From our point of view, instead of categorized all this, we simply try to make people happy. To develop this pleasure. So, in that sense, yes, you deserve that pleasure that owning a nice purse provides you. Because let's be clear.... There is nothing essential in a purse.</p> <p>E6.2) But.... Its overriding! Meaning you cannot live without a purse! but you could.... I mean a human being can live without a purse. Beside that.... YOU JUST CAN'T. That reflects an image of you, you have memories with it. That is something we realize every days when talking to our customers. They create memories with their purses. That's something a man will never understand.</p> <p>Let me give you the example of a couple that would come here.</p> <p>The wife will ask him: "What do you think about it?"</p> <p>He will answer: "I don't know, do YOU like it?"</p> <p>I know its very cliché, but the wife would like some information about; how does she look with that purse on, because that is part of her expectation. However, that is something the husband doesn't understand because to him its just a bag.</p> <p><i>E6.3) Is that a scenario you often see in this shop?</i></p> <p>That is constantly! That is the TYPICAL SENARIO! That's something we usually make fun of with our customers, men and women. So yes, you have memories with your purses you conserve them.</p> <p>I say you, but I am talking about women. Its true that the conserve them thinking: "this one was a gift, so I must keep it!" that's something very emotional.</p> <p>So yes, in that sense, yes you deserve to have a bag. And why not Longchamp above all, of course.</p> <p><i>E6.4) Above all. (laughing)</i></p> <p>Well yes, that would be too bad if I were saying no, no; you should go buy a Louis Vuitton.</p> <p>And any way they are not at all comparable.</p> <p>It is absolutely not the same product.</p> <p>You see, if we compare Longchamp to other brands, because I believe that it it something that you noticed with the surveys you conducted with women on the street.</p> <p><i>E6.5) Yes I must tell you that Louis Vuitton is the second brand that came out from my surveys.</i></p>	<p>already know the answer as well.</p> <p>E6.1) Women deserve the pleasure to own a nice purse.</p> <p>E6.2) Technically a purse is useless, it is not a basic need! However, no women can live without so in the end, it IS a necessity ! Men don't understand the relation a women has with her purse.</p> <p>E6.3) Thinks that women are emotional regarding their purses.</p> <p>E6.4) Agrees with my statement, women deserve a nice bag and a Longchamp of course.</p> <p>E6.5) Admits that Louis Vuitton is well known and easily recognizable.</p>
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<p>Yes of course, because the brand is well known and well recognized.</p> <p>It is for sure, when you walk down a street you will straight recognized a Louis Vuitton's purse, but if you look for a Chanel purse...</p> <p><i>E6.6)...It is harder to see.</i></p> <p>Of course it is harder ! Because THAT is real luxury! And the idea is..... it is something else, it is another kind of luxury. For Louis Vuitton there is an image that is created around it. And that is something they actually want to get out, that "damier" image. They want to get out of this image that is associated with the damier because everybody has it. Even kids have it on their caps.</p> <p><i>E6.7) In addition, it is very easy to counterfeit.</i></p> <p>Yes, that is ! exactly! (laugh).</p> <p>And by the way, that something kind of surprising, but regarding counterfeits, we also are affected regarding the Pliage. However, not about our other handbags. Because it is useless to counterfeit them. In the end I don't think we are that fare from the cost price that someone would get if they were producing it with the same quality.</p> <p><i>E6.8) Let me share this with you, according to my research through my survey, the 3 brands that came out on top are: Yours, Louis Vuitton and Michael Kors.</i></p> <p>Yes</p> <p><i>And when I took the time to compare these 3 brands what stroke me is that your brand is the only one that is not easily recognizable, I mean recognizable through a clear logo a symbol proudly exposed. Unlike Michael Kors that have the big golden locker, or Louis Vuitton with the "Damier".</i></p> <p>It is true, however, sometimes we have a small horse, and even that, it happens that we have some customers that don't want that.</p> <p>Even that they wouldn't, they don't want to show it. So, even though it remains discrete, that even too much, they don't want to show it. But that shows you the desire of our customers.</p> <p>I think in the brands that you have talked about, without talking about them because we only want to talk about our brand. But I believe that we are the most authentic, honestly.</p> <p>Because... It is not about the creation's date. It simply that, regarding to the fabrication's aspect, we are the only one to produce our handbags.</p> <p>Because yes, we produce our bags. They are not from fabrics that come from other societies. That is all our supply chain. We truly are leather goods producers.</p> <p><i>Ok, thank you. I believe that I am done with my questions.</i></p> <p><i>F1) Is there anything that seems important about Longchamp's evolution that you would like to add?</i></p> <p>I think that we have approached it all about the evolution of the brand.</p> <p>It is a beautiful brand! Simple, but beautiful and with the desire to last through time with a vision that is... not a</p>	<p>E6.6) A real luxury brand like Chanel is more difficult to recognized. Probably thinks that Louis Vuitton doesn't belong to "real Luxury".</p> <p>E6.7) Longchamp is also affected by counterfeits. Mostly on the Pliage</p> <p>E6.8) Thinks that Longchamp doesn't have a very visible logo because it is not what their customers want. Their moto is "luxury in intimacy". Longchamp don't produce a "show off" luxury. Longchamp is the most authentic. Authenticity is not about the creation's date. It is about the fabrication's aspect.</p> <p>F1) The evolution of Longchamp has been well covered, nothing to add. Longchamp is a simple and beautiful brand with a vision that last in time.</p>
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<p>vision that is like other brands very marketing oriented. With explosions everywhere, with symbols... We have the desire to orient the brand with quality. That is the most interesting.</p> <p><i>F2) My last question before we finish this interview: do you have a standard of welcome at Longchamp?</i></p> <p>Yes of course, like most of the brands we welcome the customers. "welcome to Longchamp" and with a smile.</p> <p><i>Thank you very much for your time!</i></p> <p>With pleasure</p>	
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DO	FEEL
<p>During all the interview Mr. Mazzotti was very relaxed, spontaneous with a confident body language. Cross legs and talking with hands.</p> <p>As for the intonations and expression of his answers here is the detail and comments for the answers.</p> <p>B1) Relaxed but serious tone of voice, look at me in the eyes.</p> <p>C1) Looking for his words</p> <p>C2) Short pause before answering. Repeating twice the sentence «They didn't change»</p> <p>D1) Brief hesitation before answering about the targeted customers.</p> <p>Very spontaneous about the fact that women in high school are totally into their best seller "le pliage" even repeat it twice "in high school!". Sounds amazed at the same time.</p> <p>Doesn't finish his sentence and go back to typical customer type.</p> <p>D4) "That's it." With a thoughtful voice</p> <p>Ask me if I am satisfied of its answer.</p> <p>D6) very fast time of reaction to answer.</p> <p>D7) repeat three times yes. Very enthusiastic tone of voice. Very communicative through his body language (with his hands)</p> <p>Use the words "very interesting"</p> <p>D8) hesitate before answering. Re contextualize his perception of the word "follow" and continue to speak normally.</p>	<p>B1) He feels relaxed, but remain serious and focused on the interview.</p> <p>C1) the fact that Mr. Mazzotti is looking for his words means that the answers aren't necessary obvious and that he needs to think about it in order to deliver the best answer. However, once he found his word we can assume that he is confident about his answer because he insists on their specificity which makes them better than their competitor.</p> <p>C3) Even though he wasn't working for the brand 20 years ago and think that he doesn't know exactly the answer he feels confident enough to answer and provide an explanation about how Longchamp differentiate itself.</p> <p>D4) "that's it." means he is satisfied with it previous answer. It also sounds like he feels that the answer was logical.</p> <p>When he asked if I have received the expected information it means that he feels confident about his answer and that he provided his best answer on the topic. He wants to make sure he is not avoiding something that I would consider interesting for the interview. It's a very professional and careful attitude. Not trying to hide information on this topic.</p> <p>D6) due to the fast reaction's time it shows that's he knows what he is talking about and that it is a topic a deals a lot with.</p> <p>D7) the tone of his voice and the repletion of the word "yes" indicates that there is not a doubt about how he feels about this evolution and the changes related to the brand. He sees it in a very positive way.</p> <p>He feels very motivated and passionate when talking about the capacity of its employee to be proactive sellers and able to adapt themselves regarding of changes.</p> <p>D8) he is not spontaneously convinced of the answer he wants to provide. Felt uncomfortable with the word "follow", that could sounds either</p>

<p>started a sentence with a negation and changed it into a positive sentence.</p> <p>E1) is smiling while answering and has a happiness in his tone of voice.</p> <p>E1.1) very communicative ! and spontaneous. And straight eye contact.</p> <p>E2) fast and spontaneous answer. Positive tone of voice. Still looking straight in the eyes.</p> <p>E4) Re contextualized the question.</p> <p>Accentuate the word “not”, sounds very categorical about this.</p> <p>E5) Sounds amused and looking away.</p> <p>E6) Again sounds amused, very spontaneous and fast in his answered. Make me participate to answer the question together.</p> <p>E6.2) Shares personal experiences.</p> <p>E6.4) Both laughing sharing information, having a real exchange of data. Un-censored way of talking.</p> <p>E6.7) Still Laughing and answering spontaneously.</p> <p>F1) Proud and serious tone of voice.</p>	<p>positive or negative. Once he explains that to him it is in a positive way. He felt more relaxed.</p> <p>E1) the fact that he is smiling and sounds happy while answering says that he feel good about this topic and that it is actually something he is glad to share.</p> <p>E1.1) The spontaneity and communicative way of answer the fact that he is looking at me straight to answer shows that he feel that I am understanding what he is saying and that he feels positive about the information shared.</p> <p>E2) Feels like this is an obvious answer, there is no doubt about the best seller in terms of quantity.</p> <p>E4) That need to re contextualized the question makes him feel more confident about answering. He ensures himself that what he will answer will not be misunderstood. In addition the tone of his voice on the negation “not” means that he feels very confident about the quality of the brand. There is no doubt about it. Longchamp handbags are equal in terms of quality.</p> <p>E5) He feels amused of the question, as he doesn't know the answer and because it sounds almost obvious to him that he doesn't have to know the answer because he was not working for the brand 20 years ago.</p> <p>E6) Messy way and unorganized way to answer but shows a real spontaneity, he share his ideas the way they come. It is clear and nontraditional at the same time.</p> <p>E6.3) Feels passionate when communicating the personal experience inside the shop.</p> <p>E6.6) He feels like Longchamp and Louis Vuitton are in a way not comparable and even that Louis Vuitton doesn't belong to real luxury.</p> <p>F1) Feels proud of the brand he is working for and defends the values of Longchamp.</p>
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Appendix 7: Map of empathy Louis Vuitton

Interview with Mrs. Sophie Le Van.

SAY	THINK
<p><u>About you</u>.³⁵</p> <p><i>B1) Which position are you holding in the store/for the brand and what are your functions?</i></p> <p>I started working at Louis Vuitton 10 years ago in Paris at the Galeries Lafayette. I first joined as a seller and gradually moved up step by step to arrive today at the position of manager. So, since 2014 exactly. At the beginning, I was only in charge of watches and jewelries. Since 2016, so very recently, I now also became in charge of leather goods, travelling items and women accessories which represents 60% of the turnover.</p> <p><u>C) Image:</u></p> <p><i>C1) What is the spirit of Louis Vuitton today? What are your values, vision and mission?</i></p> <p>The real value I would say of Louis Vuitton is overall the client. What I mean is we need to satisfy and surprise our customer. We have to go beyond his expectations and be audacious. (looking for her words) We are ahead compared to other luxury brands. Unlike others, we are lucky to offer items both for men and women from head to toes. But above all, we offer leather goods which is the heart of our work. Louis Vuitton managed to preserve its heritage through the years and has now a unique savoir-faire.</p> <p>The message we deliver today is: “yes we are a producer of leather goods but we are also fashionable”. We follow the current trend and we try to prove to our customers that we have rejuvenate. This is because we have a more demanding client base who is of course looking for (looking for her words) excellent leather goods that has a contemporary style and why not pioneering. Therefore, you can see new items everyday as we receive every month new products that will animate big classics of the house.</p> <p>So really our true value is to surprise our customer and go further with him therefore we have a dynamic and modern image.</p> <p><i>C2) In what way these elements are different from 20 years ago?</i></p> <p>I would say that it did not fundamentally change but it is more the approach that has changed. Because Louis Vuitton since more than 160 years and already when it was a small company, starting with Louis Vuitton gran son, Gaston. They were pioneers. They have always understood that the most important point was the</p>	<p>B1) She believes that she has worked hard to be at the position she is currently occupying and that she is responsible for the majority of the turnover of the store in Geneva.</p> <p>C1) She thinks that the true value of the brand is the customer itself and that Louis Vuitton is above most of the other Luxury brands.</p> <p>C2) The value of the brand did not change over the years and for 160 years, Louis Vuitton has always put the customers first. Nevertheless, the brand has always been aware and has always adapted to the current trends.</p>

³⁵ Text in blue and italic represent what I asked her.

<p>customer and to go beyond their expectation was already an important value and brand's philosophy. So, it did not change. The customer is still the main priority. Louis Vuitton has always adapted to the current trends and I think that it is simply the fact that we have evolved. Obviously, it is a different approach today but the message and the value is still the same.</p> <p><i>C3) What is the image of Louis Vuitton you would like to convey to your potential customers?</i></p> <p>.... I think that it is effectively the image of a house that lasts and perpetuates itself in terms of quality. That is clear. But also that has the capacity to renew itself and surprise the customer.</p> <p><u><i>D) Customers:</i></u></p> <p><i>D1) Ideally, what type of customers do you target at Louis Vuitton?</i></p> <p>I would say that we do not particularly target a specific type of customer. I think that Louis Vuitton has veritably desacralized itself for the past 20 years as the leader of the luxury industry. There was that old image of luxury which was only targeting certain customers but I think that the objective of Louis Vuitton today is to make the brand more accessible to people who want to invest in a luxury product. So, the ideal customer is the one who loves the house and that understands its history, and the values that are conveyed. There is no perfect customer. All the customers are good... IMPORTANT.</p> <p><i>D2) Concretely, what kind of customers do you have in your store?</i></p> <p>Well, it is particular in Geneva as we have a store which is located in the heart of Europe and therefore, we are a platform with many international customers/tourists. However our client base is mostly local as 60% of our sales are from Swiss customers from Geneva.</p> <p><i>60% is a lot!</i></p> <p>Yes, it is! And part of these local Swiss customers lives half of the year abroad. Actually, 30% of these customers are living between 2 cities all year long because of their family situation or professional duties. They must travel a lot but they are still legally based in Geneva.</p> <p><i>D4) How did your client base evolve during the last 20 years?</i></p> <p>The needs and desires have seriously changed as most of our customers now have a visibility on products and a vision of luxury that is different. To buy a luxury product today is something that has been desacralized. So the customers have higher requirements and higher expectations on the quality and the trend. Also on the visual impact, which means that if she wears a Louis Vuitton Bag, she wants the purse to be recognized but at the same time they do not want it to be too visible. Today, our customers' expectations are higher in their desire to invest on a luxury brand. It is a very challenging clientele in our everyday routine.</p> <p><i>D5) How do you try to attract new customers?</i></p>	<p>C3) Louis Vuitton wants to convey to its customers the image of a brand that lasts and perpetuates itself in terms of quality.</p> <p>D1) Every customers are important and there is no such thing as the perfect client. She believes that Louis Vuitton is for anyone that has good taste.</p> <p>D2) Because the store is strategically located and that Geneva is at the center of Europe, they have an international client base. However, 60% of them are still local consumers.</p> <p>D4) Nowadays, customers have higher expectations than before. Luxury has been desacralized and these new customers are very difficult to satisfy.</p>
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I think that it is through the products of course as it is clear that in the end it is the most concrete part of the brand. All the new arrivals that we receive with all the colors are very interesting. Also, we follow the latest trends. Either for the ready to wear. It can also be related to innovations. Like digital technology, some partnership with famous artists. We have plenty of artistic collaborations. There is a deep notion of art that really matters since we opened the Louis Vuitton's foundation. It has become more important also in terms of image of the brand. So yes, I think that it is through the product that it is going to attract the customers and also, we can see it through advertisement. It is a fact that commercials are always stronger and more present than 20 years ago when there were only few advertisements made during the year. Extremely specified and exclusively on leather goods. Now, we have commercial campaigns dedicated to all our categories of products.

To summarize it up to you the concrete changes are on the choice of colors, the digital technology and the presence of the publicities.

Totally.

D6) Do you positively see these changes?

I think that changes are certainly positive. It is the proof that Louis Vuitton is a house that is capable. After 160 years of performance and experience, Louis Vuitton is still capable to renew itself. It is very positive. Of course there is always a part of inconvenience in changes because it can attract some customers that will maybe not be able to appreciate the product for its true value and will tarnish the reputation of the product. However, I think it is part of the game to be willing to open the doors of the house to all of our customers. Inevitably that contains a risk but that is something that has been taken into consideration 20 years ago. I believe that Mr. Bernard Arnaud³⁶ is behind all this with his pioneering vision because he was the first one to desacralize luxury. So yes, I think that there are many advantages in changes but also a small part of inconveniences.

You often use the term of "desacralization" is it a synonym of democratization for you?

..... Yes, there is of course a part of democratization of luxury in this term; yes, it is for sure.

It is not a word that scares you inside the brand?

NO, not at all! The way you talk about it, I believe it also impacts the small brands that are developing around the luxury industry and this is what makes these small brands exist as well... We create the trends so that they can follow them.

They will attract some new customers that we will maybe get later on. It will depend on their revenue.

E) Sales:

D5) She thinks that the product itself attracts new customers. In addition, innovations like digital technology and a bigger presence in advertising make the brand more modern and attractive.

D6) She thinks that changes are positive as otherwise, the brand would not take such decisions.

However, she adds that changes can also bring part of inconveniences.

She sees Bernard Arnaud as the person responsible for the new direction of the brand.

She uses the term "desacralization" as a

³⁶ Bernard Arnaud is the CEO of the group LVMH.

<p><i>E1) which model of handbags do you sell the most?</i> I think, well, it is clearly our “iconic models” that you will find on our official website when you click on “iconic models”: you will find the “Caba neverfull” and the “Speedy monogram”. We may have more than 5’000 references at a certain point but the customer that comes in our shops will first be attracted to the classic and essential ones. He will go for a product he knows and he will feel reassured. However, this will not stop him from coming in the next months to buy the next editions. However, it is true that our iconic models are models that reassure because they have a history and because they have been existing for 60 years. So yes, customers will first choose these type of bags and without a doubt, the “Caba neverfull” and the “Speedy monogram” are our best sellers.</p> <p><i>What is the price?</i> It is about CHF 1,000 for a bag of a medium size which is about 30-35 centimeters.</p> <p><i>E2) 20 years ago, were these two models already best sellers or has this changed?</i> No, 20 years ago it was already these two models. Actually, not the “Neverfull” because this one is quite new, we launched it in 2009. But today, it is turning into a classic because it has evolved with the life style of women that needed a light and functional handbag. It is actually the same for the “Speedy”. This model was born in the 50’s and it was responding to the demand as women needed a bag for the city and a practical bag that looked like a small luggage. Already at this time, the “Speedy” belonged to our iconic models.</p> <p><i>E3) On a scale from 1 to 10 that would compare all your different handbags, where would you position it? (10 = the most expensive and the best quality)</i> First let me specify two things, a lower price does not mean a lower quality. Because all of our products are extremely well finished and handmade. Now, if we had to take this scale into consideration, I would say that we position it at 5. This is mostly due to its price because if we only were to judge the quality, I would give it a 10. That’s for sure! (laughing)</p> <p><i>E4) Are these models entry level products?</i> Yes, they are one of the first bags you can afford at Louis Vuitton because otherwise, the price below these would corresponds to clutch purses.</p> <p><i>E5) In your opinion, do you think that every woman deserves and should have a Louis Vuitton bag?</i> Oh yes... deserve ?? that is a very personal question! (laughing). Having a Louis Vuitton purse is like having a history, having a hand-crafted products and that is essential. For yourself of course. For many women, a bag corresponds to an important part of their life. A specific moment that we want to remember. So yes, in that sense it is important. To remember a moment and to</p>	<p>synonym of democratization.</p> <p>She thinks that the word democratization is not a bad term and that it also has an impact on small companies.</p> <p>E1) She is positive about the fact that iconic models such as the “Speedy monogram” and the “Neverfull” are their best sellers. She thinks that the iconic models reassure the customers because they are well-known products.</p> <p>E2) 20 years ago, the “Neverfull” model did not exist and the “Speedy monogram” was the only best seller. She is convinced that the “Speedy” matched the needs of the women in the 50’s.</p> <p>E3) She is extremely clear about it: a lower price is not a synonym of bad quality. Gave it 5/10.</p>
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<p>think: "I have worked hard for that, for a good quality hand bag." For some other women that have the financial resources, it will simply be part of their wardrobe. These are two different approaches but why not, there are no rules.</p> <p><u><i>F) Other:</i></u></p> <p><i>F1) Is there anything that seems important about Louis Vuitton's evolution that you would like to add?</i></p> <p>I think we have cover it all, you have asked very concrete questions, and I think it matches well what Louis Vuitton wants to convey today.</p> <p>Maybe there is a part about the trends that we did not develop. But it is a phenomenon that we can see nowadays, Louis Vuitton uses its ready to wear to communicate its trend.</p> <p>But it is more or less already answered when we talked about the image of the brand.</p> <p><i>F2) My last question before we finish this interview: do you have a standard of welcome at Louis Vuitton?</i></p> <p>Yes, of course! You can go visit any Louis Vuitton shop around the world and you will always be welcomed the same way. All the clients that enter inside the shop must be welcome the way they deserve to be welcomed. Regardless of who they are. We must respect the person and offer him the best service possible.</p> <p>Even when I travel, I go to a Louis Vuitton shop because it feels good to have this special welcome and it feels like home everywhere. It must be the same for the clients that travel all around the world. Let's take the example of a client that is loyal to our shop here in Geneva: we would like him to experience the same warmth and familiarity in the other shops.</p> <p>Yes, it is a standard but it is more than that: it is a must! To us, it is the minimum we can do for our clients.</p> <p><i>F3) I actually have one more spontaneous question: you said that Louis Vuitton is desacralizing itself since a while now, do you actually create two range of products to satisfy two different type of customers?</i></p> <p>First of all, we will not talk about "ranges" because we do collections. Each collection will be made out of different materials and have a different final look. By the way you can be wealthy and love the handbag "Monogram". It is more about the amount of work that is behind each product. So, as I said there is no range, we have collections that match everyone's expectations. For the less wealthy people, they will also find something that corresponds to their personality. The material used defines the price of the bag. A purse in canvas will obviously be less expensive than one in leather and will not seduce the same customer. The idea is not to satisfy the customer regarding its revenue but to satisfy him with quality. This criteria matches everyone's expectations, whether they are wealthy or not.</p> <p><i>Thank you for your time, I believe we are done</i></p> <p>You are welcome, I hope that it will help you</p>	<p>E4) The two best sellers belong to entry level products.</p> <p>E5) She believes that the question is not relevant. However, she thinks that having a purse that has a history behind and that is hand-crafted is essential.</p> <p>F1) She thinks that we have well covered the topic. No need to talk more about.</p> <p>F2) She thinks that the welcome standard at Louis Vuitton is extremely well organized. It is like going home every time she enters a LV store because they all apply the same standard of welcome.</p> <p>F3) She thinks that using the word "range" is inappropriate. Louis Vuitton do collections. Products are created to satisfy everyone's desire. However, some handbags are more accessible.</p>
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DO	FEEL
<p>B1) Speaks fast, does not need to think before answering and looks at me directly in the eyes.</p> <p>C1) Still speaks very fast and forget what she wants to say.</p> <p>C2) Sounds more relaxed, takes the time to speak.</p> <p>C3) Does not answer straight. Need couple seconds to answer. Provides a short answer.</p> <p>D1) Looks at the ceiling. Confident tone of voice</p> <p>D2) Spontaneous way of answering, smiling.</p> <p>D4) Answers straight</p> <p>D5) Sounds calm, speaks slowly.</p> <p>D6) For the second part, she briefly hesitates and looks at the ceiling before answering and then answers straight. Very natural tone of voice. Sounds very sincere. Then when talking about the trends sounds a bit arrogant and self-satisfied.</p> <p>E) Starting to reposition herself on the sit and plays with a pen.</p> <p>E1) She is attentive and looks at me in the eyes, then is very spontaneous</p> <p>E2) Has a very happy tone of voice, starts talking with her hands.</p> <p>E3) Has a close face</p> <p>E4) Has a natural tone of voice, calm gesture.</p> <p>E5) Sounds surprised.</p> <p>F1) Has a natural tone of voice, calm attitude.</p> <p>F2) Sounds very dynamic, and has a happy face, she smiles a lot.</p> <p>F3) Sounds satisfied and calm</p>	<p>For the interview in general, she did not feel very comfortable. However, unlike Longchamp that required the questions ahead of time. She discovered all the questions on the day of the interview.</p> <p>She did not seem very confident about her answers in general. Because she started all her sentences with a conditional time. And often said that she hoped she answered properly.</p> <p>B1) She felt very confident about her answers and even shared more than the original question.</p> <p>C1) She felt probably uncomfortable, she answered in a much unorganized way and not even to the question. She must have kept in mind the introduction of the interview because she is already talking about other topics.</p> <p>C2) She felt more relaxed than at the beginning, maybe she distanced herself from her answer because it concerns the past and not the current status of the brand.</p> <p>C3) She felt like she has already answered most of the question in her previous answers therefore, she needed time to find something new to add and she answered shortly but clearly.</p> <p>D1) Her body language did not show a strong conviction at the beginning but once she started talking the tone of her voice sounded like she was convinced of her answer.</p> <p>D2) Felt proud of the diversity of the store but also that the % of local customers is very high.</p> <p>D3) She sounded like she knew what she is talking about.</p> <p>D4) Again felt very comfortable about the answer that is part of her routine, she knows her customers very well.</p> <p>D5) She felt that the product is what will attract the customers. She also felt confident about the quality of Louis Vuitton's products.</p> <p>D6) Felt positive about her answers, was not afraid of the word democratization, didn't even seem surprised of the question.</p> <p>When talking about the trends, she felt extremely proud of Louis Vuitton, in her opinion the brand clearly creates the trend and she felt convinced about it.</p> <p>E) She felt uncomfortable talking about the sales, so reject the topic through her body language</p> <p>E1) She almost felt relieved to hear the first question that is about the product. Then felt very excited about the topic, we can tell that it is a theme she knows well as the manager of the store.</p> <p>E2) Same as for E1, she felt confident about her answer, she even wants to share more about the history. That means that she was feeling relaxed.</p>

	<p>E3) She felt upset with the question. She didn't want me to associate a low price to a low quality and wanted to make sure I am not going that way with my questions.</p> <p>E4) She didn't feel surprised of the question.</p> <p>E5) She felt like I am a bit intrusive, and that as it is a personal question it is not really of my concerns, however she still provided an answer.</p> <p>F1) She felt neutral, not particular emotion showing.</p> <p>F2) She felt happy to talk about her personal emotion regarding the various store around the world that make her feel like at home.</p> <p>F3) She felt enthusiast about the standard welcome. To her, they are all very welcoming and make her feel very comfortable. She expects it to be the same for the customers.</p>
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Appendix 8: Map of empathy Céline

Interview with Mr. Alexandre Guybert .

SAY	THINK
<p><u>About you:</u> <i>B1) Which position are you holding in the store or for the brand and what are your functions?</i> Responsible for sales <i>B2) Since when are you working for Céline?</i> 2013. <u>C) Image:</u> <i>C1) What is the spirit of Céline today? What are your values, vision and mission?</i> For the values you can say focus, sincerity and flexibility of the house. Our values are related to services, to handcrafted product, to modernity. Céline's moto is "less is always more". For the image, there are 2 big dates to remember. First the collaboration with Michael Kors in 1997 helped to add value for the handbags and accessories. Well yes, Michael Kors really helped to improve the image of the brand because he gave it a more luxurious aspect. Then the second date that had an impact on the image of Céline is 2008. This is when Phoebe Phil arrived at the board of artistic direction. She had great ideas for the brand and since 2008, the brand has seriously improved. Céline is now considered as a feminine, elegant but also minimalist brand. People like that. <i>C2) In what way these elements are different from 20 years ago?</i> I wasn't there 20 years ago How could I answer that? But probably a more familial way to take care of the business. Before Céline was a brand without particular accent and classic and now since 2010 is has been working on its image they have been working with famous designers like Michael Kors. Many designers contributed to new collections for the brand. As I said, before, it was kind of classic. Regarding the leader goods it was maybe a bit less luxurious. Some of our bags were produced in China, you know what I mean... Now céline has been modified through a new marketing process, with new visuals and is completely changed. Also regarding its production. Now we are totally more focus on the leader good production and its artisanal aspect. they care about details. <i>C5) What aspect of the image of the brand have you seen evolved during the last 20 years?</i> As I said, the brand was very simple and oriented on classic items, the brand had kind of a conservative</p>	<p>In a general approach, Mr. Guybert think what he said. When he did not want to develop its answer he did not. And when he thought that the author could find the answers by herself he said it as well.</p> <p>B1) He Thinks that he doesn't want to develop his answers.</p> <p>C1) He thinks that the main values are : focus, sincerity, flexibility. The image is related to several important date: Collaboration with MK. Arrival of phoebe at the board of artistic direction. Phoebe seriously improved the the brand's image.</p> <p>C2) Thinks that Céline used to be a classic brand with no particular accent. He thinks that Céline has changed a lot and that it is due to the collaboration of the brand with famous designers.</p> <p>C5) He thinks he is repeating himself and that he has nothing more to say.</p>

<p>image... and now I believe it it still a simple brand in a way but not like it used to be, not it is simple but more “minimalist” and the colours, the style of the items are more feminine.</p> <p><u><i>D) Customers:</i></u></p> <p><i>D1) Ideally, what type of customers do you target at Céline?</i> Everyone, but a bit more the active women between 35-45 years old. But we have customers from 20 to 70 years old. We target more active and independent women.</p> <p><i>D2) How was your targeted customers, 20 years ago?</i> I imagine more classic and probably a bit older. But again it is hard to answer because I wasn't here 20 years ago...</p> <p><i>D3) Concretely, what is the typical customer at Céline?</i> Today, I think that the typical customer would be more modern than in the past. Maybe younger as well. The women that enter in this store look like independent and modern women. Then again these women have between 20 to 70 years old.</p> <p><i>D4) How did your clientele evolved during the last 20 years?</i> Well, it has evolved... it has evolved in a way that we target now more people than before. Before our customers were more classic and now we have more modern and trendy customers. The customers of the brand are more reserved, they highly rely on the brand. However, we still have the classic customer type. But in addition, we have these new kind of customers which are sharper on their expectation of the brand.</p> <p><i>D5) How do you try to conquer new customers?</i> Well... Through actions.... But this is something confidential it must not spread out of the house. I cannot really share that information with you. But we have actions that establish a long term relation with our clients. We have specific sales process at Céline that allows us to realize various successful sales. Once we have established a first contact we do our best to keep them, we call them, we offer them gifts, we let them know when a new collection arrives, when it is the sales period and finally when we organize special events.</p> <p><i>D6) how did your methods to approach new customers progressed?</i> Yes, of course, it has evolved with the digital technology. Now our customers can also go online, they have an application on their phone. The technics to approach new customers is more modern nowadays. However Céline doesn't want to be present on social media.</p> <p><i>D8) Do you positively see these changes?</i> Well yes, from this point of view, for our customers yes... we can be more precise about what the customers need. We can send them pictures, the interaction with our customers is more direct.</p>	<p>D1) Thinks that Céline targets everyone.</p> <p>D2) Thinks that Céline customers were more classic 20 years ago.</p> <p>D3) He thinks that the typical customers are modern, young and independent women between 20 and 70 years old.</p> <p>D4) Thinks that the brand target more people than before. Customers are more trendy and have sharper expectations.</p> <p>D5) Thinks that the brand tries to conquer new customers through actions, but he thinks that this is a confidential topic and does not want to talk about it.</p> <p>D6) Thinks that the brand has evolved with the digital technology and that Céline does not want to be present on social media.</p> <p>D8) Thinks that the changes are positive for the customers.</p>
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<p><i>D9) Do you have a typical standard of welcome at Céline?</i> Yes, you should come to buy a handbag and you will see by yourself how we welcome customers.</p> <p><u><i>E) Sales:</i></u> <i>E2) Can you talk about a general increase of the sales in this store?</i> Oh yes, this has been very general for the brand, I guess, since 2010 the brand is doing very well. But I can at least confirm you that already in 4 years since I arrived at Céline there is a noticeable improvement.</p> <p><i>E3) which model of handbags do you sell most? What is its price?</i> <i>Of course! our best seller is the “Luggage”. In the “nano” size. It was actually launched in 2010. You see how everything is connected!</i> <i>Its price is about CHF 2000.-. We actually have a range of price for this model. So, it goes from CHF 2000.- to 2800.-.</i></p> <p><i>E4) On a scale from 1 to 10 that would compare all your different handbags, where would you situate it? (10 = the most expensive and the best quality)</i> I would say 7. It is not necessarily an entry level product because it is the average price for a handbag at Céline. We have other less expensive bags like “the caba” but they do not belong to our best seller’s category.</p> <p><i>E6) In your opinion do you think that every woman deserves and should have a Céline’s?</i> I would be dumb not to answer yes.</p> <p><u><i>F) Other:</i></u> <i>F1) Is there anything that seems important about Céline’s evolution that you would like to add?</i> I think we can also mention something about Céline in general; One of the biggest changes of the company is also related to the fact that they tend to be more sustainable than before.</p>	<p>D9) Thinks that if the author wants an answer to this question she should be a customer of the brand.</p> <p>E2) Thinks that the brand is doing well since 2010, but that he can only judge for the last 4 years.</p> <p>E3) Thinks that Céline’s best seller is: “Le Luggage Nano”. Its price is between CHF 2’000 and 2’800.</p> <p>E4) He thinks that Céline’s best seller is worth a 7.</p> <p>E6) He thinks that the answer is obvious and that even if he doesn’t think so that’s the only answer is allowed to provide. F1) Thinks that it is important to talk about the sustainability of the brand.</p>
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DO	FEEL
<p>B1) Sounds really annoyed, C1) Doesn’t let me explain the concept, because he doesn’t have too much time. Sounds aggressive. C2) sounds negative and arrogant: I wasn’t there 20 years ago...” C5) Reply with short answers. D1) Short answer, plain tone</p>	<p>B1) He feels like he doesn’t want to answer the interview C1) He feels that he doesn’t have time to lose. C2) Still feels like I am wasting his time. C5) Feels upset because I told him that if he doesn’t want to continue this interview we can stop it. D1) Feels that he doesn’t have much information to provide because the brand targets everyone. D2) Again he feels like every questions about 20 years ago are inappropriate to ask because he was not working for the brand at this time.</p>

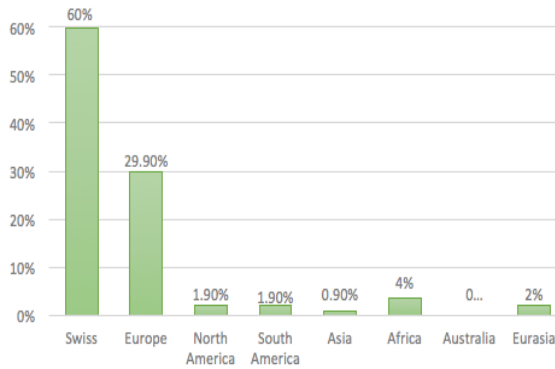
<p>of voice. D2) Negative tone of voice, D3) neutral tone of voice, talking with its hands. D4) uncertain tone of voice D5) Absolutely unfriendly, he sounds like he wants to start an answer and then no. D6) Friendly way to express himself, smiling. D8) Strong facial expression, positive tone of voice. D9) Short answer, arrogant E2) Positive tone of voice, happy face E3) Has a very enthusiastic tone of voice. E4) Confident tone of voice. Look at me straight in the eyes. E6) Very sarcastic and annoyed tone of voice. Looking at me with big eyes. F1) calm attitude.</p>	<p>D3) D4) He feels more like he is guessing for an appropriate answer than convinced by what he says. D5) He feels like he doesn't have to answer this, but must somehow feel bad about his answer because he tried to provide a substitute answer. D6) Feels positive about its answer he talks about a positioning of the brand that he knows. Probably tries to balance his emotion compared to the previous answers that was very icy. D8) He feels that changes are a good thing for the brand. D9) Feels like the question is not worth an answer. E2) Feels like he knows the topic and is confident to talk about it. E3) Feels confident about his answer. E4) Feels like the quality handbags of the brand's best seller is worth a high ranking. He feels confident about the products he sells. E6) he probably feels like the question is "stupid" and does not understand the purpose of it. F1) Feels that people should know about the sustainable part of the brand. In general Mr. Guybert was not feeling comfortable with all the questions about the image of the brand. Things went better when we started to talk about customers.</p>
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Appendix 9: Results from survey 1 and 2

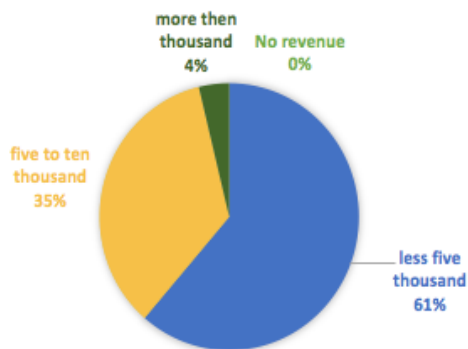
This Appendix is to compare the results obtained from both survey (1&2)

Survey 2 (1990)

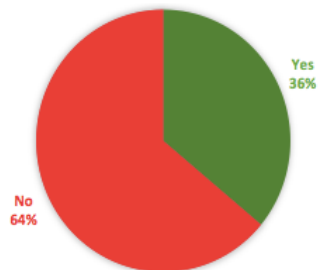
Graph 1.2: Nationalities



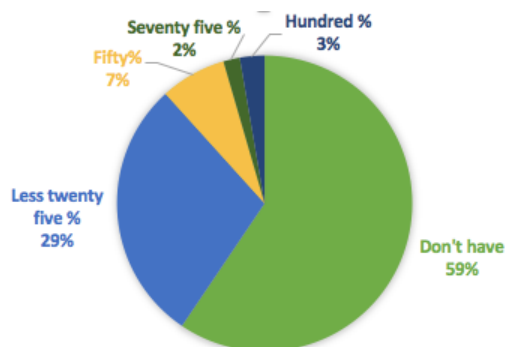
Graph 2.2: Revenue Rank



Graph 3.2: Do you have a luxury handbag

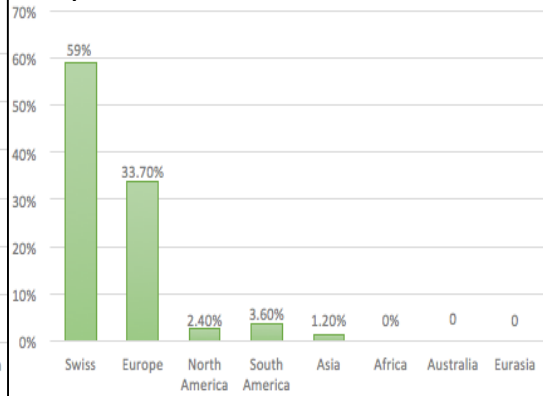


Graph 4.2: What % does it represent

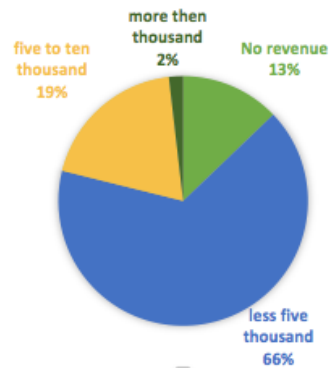


Survey 1 (now)

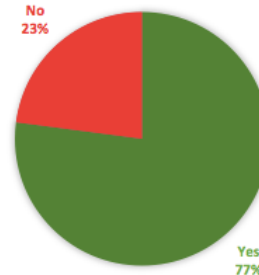
Graph 1.1: Nationalities



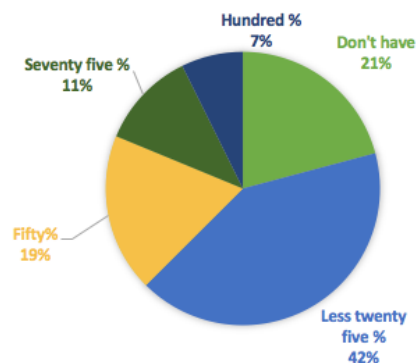
Graph 2.1: Revenue Rank



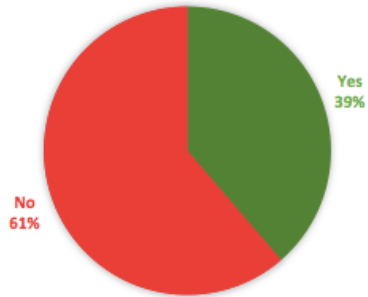
Graph 3.1: Do you have a luxury handbag



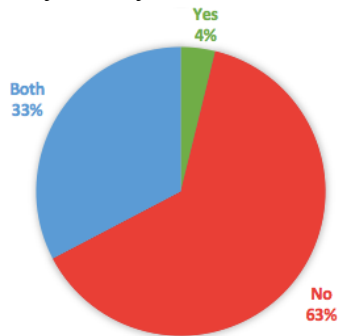
Graph 4.1: What % does it represent



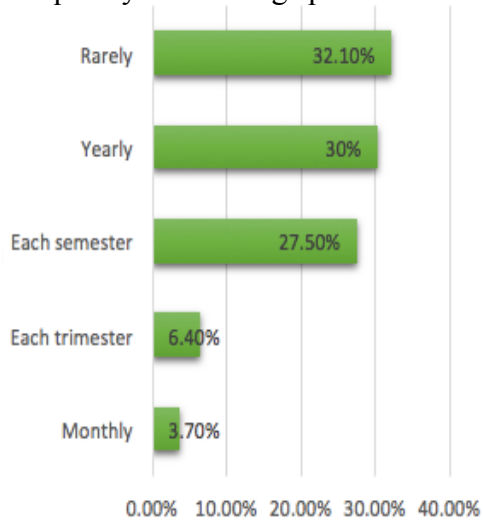
Graph 5.2:
Do you regularly buy hand bags



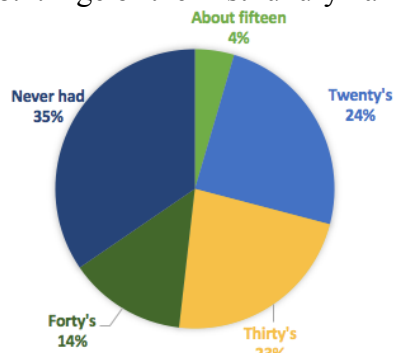
Graph 6.2:
Do you buy luxury or no brand bag



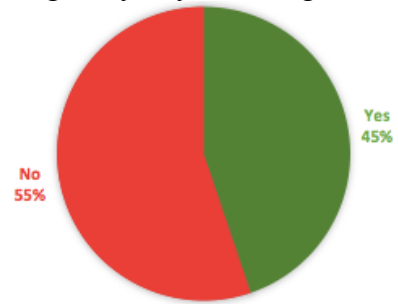
Graph 7.2
Frequency of new bags purchase



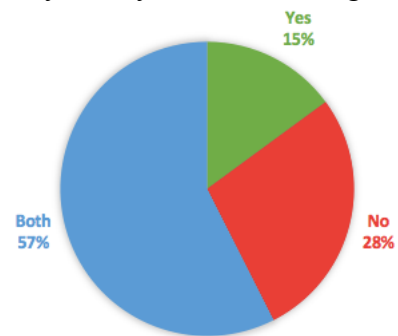
Graph 8.2: Age of the first luxury hand bag



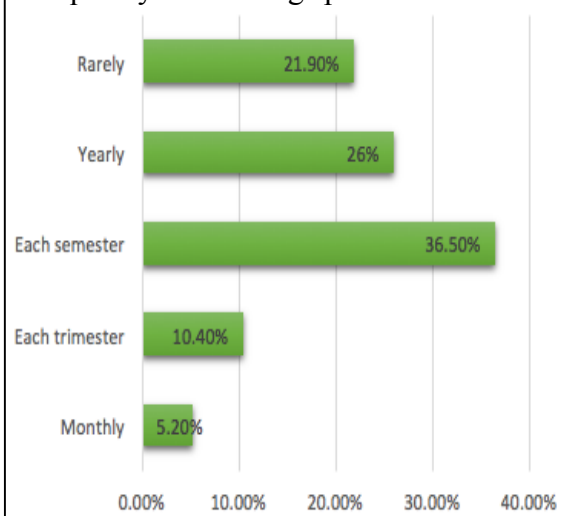
Graph 5.1:
Do you regularly buy hand bags



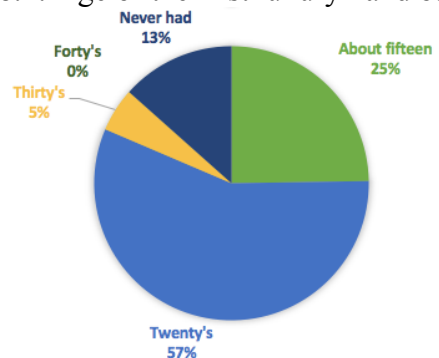
Graph 6.1:
Do you buy luxury or no brand bag



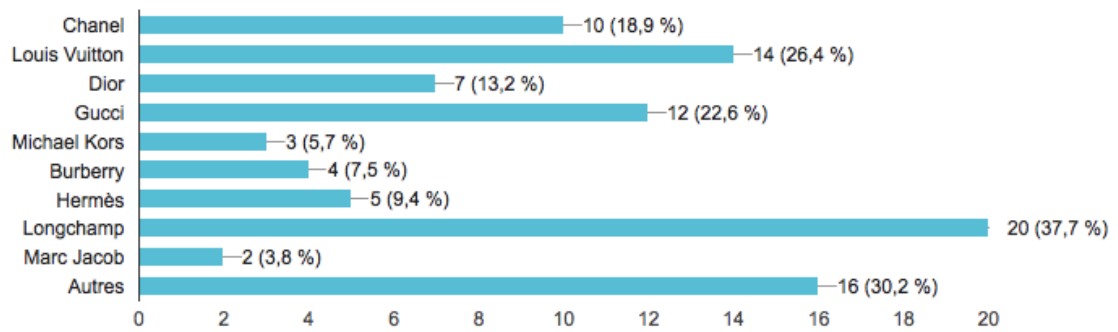
Graph 7.1:
Frequency of new bags purchase



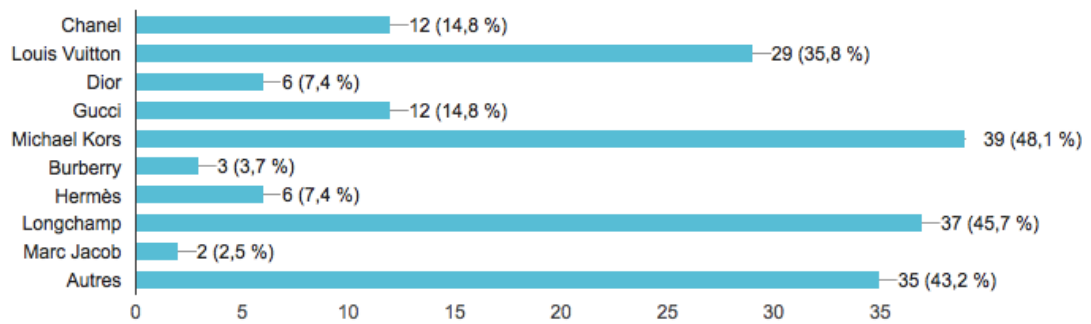
Graph 8.1: Age of the first luxury hand bag



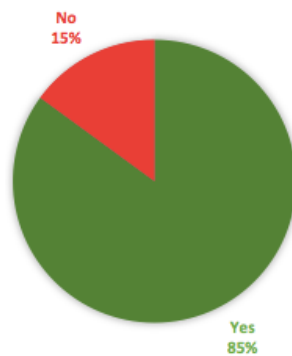
Graph 9.2: Brands women have (Survey 2)



Graph 9.1: Brands women have (Survey 1)



Graph 10.2:
Is it easier to have a luxury bag in 2017



Graph: 10.1
Is it easier to have a luxury bag in 2017

