

CONTEMPORARY FEMALE

VOGUE
PUBLICATIONS
SUMMER 2015

REVEALED

A TALE OF
THREE CITIES

A SNAPSHOT OF
NEW YORK
SHANGHAI
AND BERLIN

THE SUMMER OF SHOE

"A SHOE HAS SO MUCH MORE
TO OFFER THAN JUST TO WALK."

CHRISTIAN LOUBOUTIN

WANDERLUST:
7 MYSTERIES TO
TRAVEL FOR!

HEAD
STRONG

Maintain a healthy
mind and body

PLUS

FASHION | BEAUTY | CAREER | HEALTH & FITNESS | TRAVEL

SHOP LIKE A GENIUS

AVOID THESE SHOPPING
PITFALLS AND GET YOUR
DREAM WARDROBE



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CONTEMPORARY FEMALE REVEALED

VOGUE
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EDITOR'S LETTER

Hi there and thanks for taking time to connect with project Vogue.

The Contemporary Female has been identified as a big commercial opportunity for ECCO. But who is she, what does she want from shoes and what should ECCO do about it? Project Vogue was designed to answer these questions.

Section 1 – The Contemporary Female and her World

We immersed deeply with Contemporary Females in China, the US and Germany by spending time in their homes discussing everything from her hopes & fears to the contents of her handbag & wardrobe! We visited the parts of the city where she shopped, relaxed and worked. We also spoke to societal waymarkers (life coaches, fashion bloggers etc.) to get an outside perspective on our target. This section represents a 360 degree portrait of her world, bringing to life everything you need to know about her.

Section 2 – Our Insight Platforms

Consumer Insight is the fuel for good innovation, but it's what you do with it that really counts. As spring-boards to commercial innovation we co-created seven Insight Platforms with the ECCO team in Tønder. Each platform is rooted in the unmet needs of the Contemporary Female and is designed to guide the ECCO strategy over the next 5 years.

Keep this magazine with you, use it to anchor yourself back to the Contemporary Female in your day to day, to inspire you and above all, enjoy!

Team Vogue

The Project Vogue Team

Supported by:

ECCO®



WHO WE SPOKE TO

- CF 8x Contemporary females
- MC 4x Mature, sporty casuals
- FF 4x Fashion forwards
- WM 6x Waymarkers

3 MARKETS:

- China
- Germany
- US



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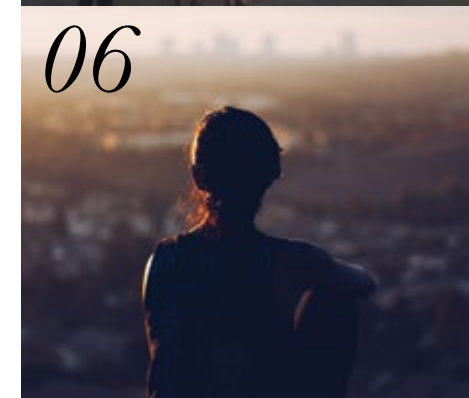
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A woman's legs, wearing denim shorts and blue fuzzy shoes, are positioned over a row of various women's shoes on a light-colored floor. The shoes include a yellow sneaker, dark blue loafers, pink flip-flops, striped loafers, black high-heeled sandals, leopard print loafers, and dark blue loafers with bows.

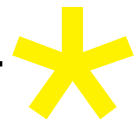
OUR CONTEMPORARY FEMALE

Here you'll find out what's going on for our Contemporary Female. This section covers the global similarities that bind her in terms of fashion and style, inspiration and her bigger picture motivations.

WHAT IS IMPORTANT FOR HER?

FREEDOM AND INDEPENDENCE Travel is a huge passion for her. She's open-minded and curious and wants to explore and learn new things, relishing the escapism from her busy life. She values culture and absorbing knowledge, seeing herself as a woman of the world and of substance.

With this comes a constant quest for independence, **'to go it alone'**, without ties, without a man and to forge her own path. She's inspired by strong women with great achievements behind them. Paris Hilton is her antithesis, **'a book without pages'**.



The life

Contemporary female

SUPPORTING OTHERS AND ACHIEVING 'BALANCE'

She wants to be in control of her life and be a strong pillar of support for those around her (family, neighbours, colleagues). Her sense of self-worth comes from helping others along their journey. She off-sets the many demands on her time and attention by striving for 'balance' between the spheres of her life; work, family, friendships. Leading a holistic lifestyle (e.g. yoga, healthy eating, getting closer to nature) is her way of pressing the 'reset' button. She is conscious of her place in the wider world, introspective, and aspires to a simple, relaxed (European) lifestyle.

"As a woman it's quite important to be independent, you can do whatever you want, have freedom."

CF Shanghai

GATHERING EXPERIENCES AND CREATING CONNECTIONS

She is motivated by experiences and connections, not possessions or climbing the corporate ladder.

FEELING LIKE A WOMAN FROM ONE DECADE TO THE NEXT

Femininity is a fundamental part of her identity and there are times in her life where she may 'embrace', 'suppress' or feel the need to 'reclaim' her femininity. As she ages, she can no longer hide behind 'sexy' and femininity takes on a new meaning for her (i.e. little details, cuts).

STAYING YOUNG AND RELEVANT

She looks fondly back at her youth, as a time of possibilities and opportunities. She has keep-sakes around the house that she refuses to let go of like an old pair of Converse, or a pair of ballet shoes at the back of the wardrobe (though she hasn't danced in 15 years). As she gets older she wants to stay looking and feeling young, be able to connect with younger peers and feel 'relevant'. She fears getting left behind in the workplace, amongst peers socially, and on the dating scene.

Shopping habits

HOW AND WHERE DOES SHE SHOP? First off, she really loves to shop. Fashion and shopping is something she describes as 'just for me' (i.e. when I don't have to be a wife, mother etc.) and is the ultimate form of escapism. It's also something she feels she is good at.

"Shoes are like cars. They display yourself and social class."

— Annie, waymarker, New York

BRICKS OVER CLICKS (ESPECIALLY FOR SHOES)

When it comes to shoes, she prefers shopping in physical stores because she needs to see, touch and feel, but most importantly judge comfort and fit. This form of guidance gives her confidence that she's making the right purchase. Conversely online shopping is a potential jungle of bad decisions and stress*

* Young FFs very occasionally buy shoes online with mixed levels of success, but favour in-store.

* Shopping for clothing online is prolific in New York, again less so for shoes (but this is slowly gaining traction).



"My ideal day? Get on a train to an unknown destination, a foreign city. Just stroll around, explore, get lost, just be. Beautiful."

CF

SHOES ARE A LOVE AFFAIR... Shoes define who she is and what others think of her. They tell the stories of the different roles she plays in her life, past and present.

"A yogi would never find him or herself in a situation thinking 'how did I get here' because you learn to track your steps / pace in life."

— Steph, yoga instructor, Berlin

* The Style Contemporary female

WHAT'S HER RELATIONSHIP WITH FASHION / STYLE?

SHE KEEPS IT CURRENT (BUT SHE'S NOT AHEAD!)

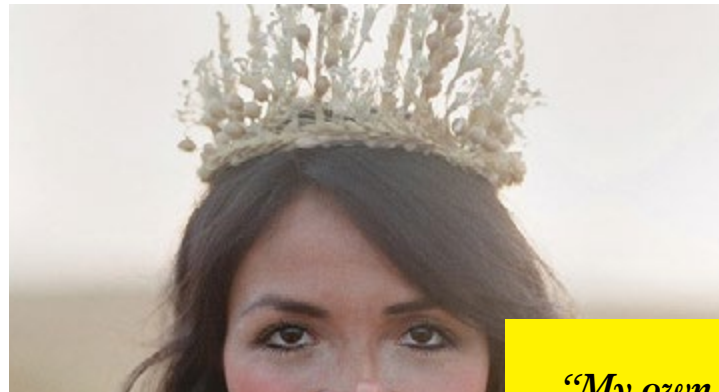
She stays up-to-date with the latest fashions, but isn't a fashion slave (not at the forefront of fashion or ahead of trends). Her aim is to be a player in the fashion game rather than the queen bee.

SHE SEEKS AFFIRMATION FROM OTHERS

Recognition is hugely important to her. She wants to be 'interesting', so it's important for her to have stories to tell. She seeks reaffirmation on her brand, lifestyle and particularly style choices as this gives her confidence she's doing the 'right' thing and makes her feel recognised and valued.

"I like to be unique but still seek input on my style from colleagues and friends."

MC Shanghai



SHE SEES HERSELF AS A LEADER

In her mind, within her tribe she's a style leader, someone to whom friends and colleagues come to for advice and style tips in particular. In reality she struggles to articulate the latest trends (and even sometimes to name brands!). She's much further from the fashion nucleus than she thinks!

"My own twist makes me feel empowered, rebellious and in control."

FF New York



"My friends see me as a consultant, a re-styler, a bargain hunter."

FF Berlin

SHE LIKE TO SHOW HER PERSONALITY, BUT NOT TOO MUCH!

She wants to feel like an 'individual'; express her unique personality, feel different to everyone else and be described as having 'her own style'. In reality she sticks with safe options of brands, combinations, colours. Often shoes and handbags are the 'sweet spot' of the fashion terrain where she feels comfortable to make small twists that show more of her personality, because a little twist equals a little risk. At the end of the day, nothing is more important than feeling accepted.

"Shoes that match your dress make your outfit perfect."

FF Shanghai

SHE CLINGS TO STYLE SHORTCUTS

She finds reassurance in quick 'litmus test' tricks, such as brands and matching colours. These help her feel confident in her style choices as she lacks the fashion prowess or bravery to take a real risk. High street stores are a comfortable, happy place, providing the perfect refuge (as it's hard to miss the mark with Zara). In this way, she defines her own style within the boundaries of 'what's popular'.

"Street style is closer to you, can get ideas, celebrities are too far away."

MF New York

Influencers



WHO INFLUENCES / INSPIRES HER?

She keeps it real. Her key influencers are those in close proximity; friends and colleagues by whom above all she wants to identify with and be accepted by. For mums especially there are those who put more pressure on her to look a certain way day-in day-out (i.e. daughters, husbands), whom she aims to please. This can cause more stress than inspiration, as she's pulled in multiple directions.

Style inspiration also comes from close to home; street style, social media and magazines (on occasion). Shopping trips are really important for her as she feeds off the tactile nature of being in-store, as well as getting great value from seeing how items are styled (as part of an outfit). She's not a fashion maven, she needs to see looks working well for others, that are easy for her to translate into her own style.

"My teenage daughter, mum and neighbor have an opinion about my style."

MC New York

AND WHAT'S OUT OF SCOPE?

Inspiration sources that feel too out of reach or complex. Celebrities and models are aspirational from a beauty perspective but not realistic as they are too far removed from the real world, lives lived in a bubble, miles away from her own. Indeed, the 'glossy' realm of high fashion (the catwalk, high-end magazines) isn't on her radar as those looks are too complex for her to disseminate. She's also not looking as far as fashion peer leaders (i.e. bloggers, stylists).

Charting the Contemporary female by lifestage

HOW DO HER PRIORITIES EVOLVE AS SHE MOVES THROUGH LIFE?

- 20s Finding herself
- > **EXPERIMENTING AND EXPLORING** her identity; deciding who she is, what she wants to do and be. She's still defining her own 'brand' and corresponding style. Laying foundations for her future!
 - > Mistakes are being made, her 20s are a launch pad for **BRAVE AND BOLD DECISIONS**.
 - > Her **OPTIMISM** and the sense of opportunity is high. There's a surplus of new choices and possibilities ahead!
 - > Friendships as well as 'dating' are key focusses.
 - > Likely to be **LESS QUALITY AND VALUE FOCUSED**.

"Three objects that represent me? My yoga mat, my passport and my jewellery. My mum bought me a Tiffany's necklace as a memento of our journey there together, our adventure."

FF Berlin

- 30s - 40s Being herself
- > Acceptance of more **RESPONSIBILITY** becomes a key factor (marriage and kids), with the **FOCUS ON OTHERS NOT JUST HERSELF**
 - > The stakes are higher and decisions feel make or break. Life has become 'harder' with more routine and the need for escape and reward heightened
 - > Competition gets fiercer and having focus becomes more important
 - > Strong desire to 'upgrade' and demonstrate progression
 - > More **SELECTIVE** (with a smaller, staple repertoire). More expensive and conscious choices with a higher focus on quality
 - > Staple brand repertoire

"I have had the feeling that I was always searching, this is getting less."

FF Berlin

- 50s - 60s Reawakening
- > Re-defining herself (following divorce, empty nest), forced to rethink 'who I am' and 'what I want'. Time (and money) to rediscover herself.
 - > Wants to keep up, **FEAR OF BEING LEFT BEHIND**. Being able to connect with younger peers and still feel 'relevant'
 - > More mindful of the bigger picture and her wider place in society; what's in it for me, my family, my country and the world I live in?
 - > **HYPER-SELECTIVE** and focus shifts almost exclusively to quality

"Staying young is important to me. Not just in appearance but also staying young on the inside."

MC Shanghai

Lifestyle facts

	CHINA	NEW YORK	BERLIN
Average age of first marriage	27	28	30
Average age of first child	28	26	30
Divorce	2.6%	51%	33%

CF
Contemporary female

VS

PF
Practical female

TF
Trendy female

Likes to be up-to-date with the latest fashion
Will not compromise style for comfort, practicality or functionality
Her style is more modern, attractive and stylish and slightly less toned down and practical
Has a big focus on her outer appearance because she really cares about what other people think! (even though she might not admit it)
Wears a larger variety of shoes (from high heels to casual sneakers)
But, the older CF gets the more her interest in functional shoe features increases

Not a trend seeker / at the forefront of fashion (takes inspiration from the high street, not the catwalk)
She uses her style to achieve credit and status from others (vs Trendy who dresses more for herself)
Has 'bigger things going on' than fashion
Opts for safe choices (high street brands) rather than vintages stores or niche labels
Lacks confidence to truly play around the edges with her style
Exists in all age groups (whereas trendy typically below 39 years old)





MARKET SNAPSHOTS

This short section will give you a feel for the three markets we visited. What are the most important societal trends we picked up? What's the lay of the land when it comes to style and shopping?

01

MARKET SNAPSHOT



SHANGHAI



FOREVER YOUNG Staying young is one of the biggest hopes and fears in China, and this is evident through the amount of emphasis placed on beauty and using style to remain looking youthful (there's almost childlike cues with bright colours and Japanese cartoon characters proving popular no matter what age you are!).

GROWING DESIRE FOR WELLNESS emerging and set to take off with awareness around air quality (everyone wants an air purifier) and wellness (juices, yoga etc.) becoming big business in China.



What's the *vibe*?

I CAN DO ANYTHING! Mirroring the exponential growth in the Chinese economy, there's a keen sense that you can be your own boss, run your own online store and become a billionaire overnight. Opening the doors to travel and tourism has created a generation who feel they can do anything or go anywhere.

NEW, NEW, NEW! It's all about having the latest thing in China, the pace of change has been incredible in the last 20 years, keeping up to date with the latest thing – be that fashion, food or electronics, is huge if you want to stay relevant.

OLD MEETS NEW The astronomical pace of change has created a significant generational gap (mum versus daughter) and tension between the bright lights of the high-tech digital world and the tradition cemented within Chinese cultures (e.g. strong family values).



And the *style*?

CASUAL IS KING Style is universally described as “casual” but often more exaggerated than European or American counterparts, with an element of “bling bling” nearly always thrown in (bright colours, sparkle, details).

FOREVER YOUNG. NEVER FORMAL I don't want to look too serious / boring”, and very little distinction between work / social / weekend style.

BEING FEMININE is an expectation, not a question. You won't find tough or masculine here, it's all about being a 'lady lady'.

BIG BRAND CULTURE with high-end luxury brands such as Louis Vuitton, Chanel and Prada having led the way during China's fashion evolution, such big logos, bling bling and bright colours are commonplace.

STRONG OVERSEAS INFLUENCE (lots of travels) from the likes of Japan and Korea, and a strong prestige associated with European brands – seen as higher quality than local Chinese brands and very aspirational due to the clean relaxed lifestyle and fashion credentials (led by Italy).

Hong Kong women are ambitious...Shanghai women want life; freedom, personal independence.

Christine, career coach, Shanghai



450% And the *shopping*?

**RISE IN SALES
OF ANTI AGEING
PRODUCTS IN
CHINA OVER THE
LAST TEN YEARS**

PRADA
LOUIS VUITTON
CHANEL

SPRAWLING MID-HIGH END SHOPPING MALLS on every corner, with every possible brand you could wish to find. Shopping is a destination in Shanghai, somewhere to hang out with the girls or spend time with your family – you can do pretty much anything from going to the cinema to bakery lessons!

MALLS REFLECT THE DESIRE FOR “BLING BLING” with colourful shop windows and engaging in-store environments with lots going on, and a digital display on every shop window.



02

MARKET SNAPSHOT



NEW YORK

What's the *vibe*?

A 24/7 JUGGLING ACT women in NY & NJ live very full lives. They often carried 2 bags, changes of clothes and yoga mats with them between meetings and picking up children.

I WALK MILES EVERYDAY Our NY women walk the walk, they believe more than any other city in the western world.

FEMININITY vs THE WORLD Our NY CF's femininity felt like it was under attack from all angles. Focusing on her succeeding in her career meant adopting masculine traits in the workplace. Becoming a mother meant baby vomit on your clothes and masculine shoes. Getting older meant more practical clothing and a loss of the looks she'd used to define her femininity when younger.

BASIC BITCH: The US pop-culture pejorative term for a woman who sees herself as a strong individual but in reality buys into bland, boring products (Ugg boots and Starbucks pumpkin spice lattes). Given her constant need for validation in one of the world's fiercest cities, we began to question whether New York or CF is indeed a basic bitch?



And the *style*?

IN SHOES, KILLER HEELS are a must-have staple, associated with power-dressing when she needs to feel empowered and in control. Often they're dragged out in clunky handbags and switched in at that all important shoe change two blocks away from her final destination. Emotional security also came from sneakers, with many CFs owning battered yet 'safe' pairs to whom they felt a comforting, nostalgic pull.



"I didn't know the city at all, but I was so happy to be in New York I cried. I was so excited."

Greta Gerwig



And the *shopping*?

CLICKS OVER MORTAR: with very few hours around the clock, our CFs in the fashion capital have come to rely on online shopping as the ultimate convenience. Concierge store cupboards overflow with parcels.

Price dominates, with many (designer) purchases often justified by being on discount or 'last season'.

03

MARKET SNAPSHOT



BERLIN



What's the **vibe?**

ANYTHING COULD HAPPEN

There's an infectious sense of possibility (particularly in the east). Empty warehouses, a distinct lack of franchise stores, a plethora of small business plus low rent (just locked in by the government) all contribute to the feeling that dreams are within reach.

SHE STARTED IT Within the air of opportunity, there's a spirit of female entrepreneurship. Start-ups are being powered by women in their late 20s / early 30s, as well as mums starting new ventures after having kids. Also inspiring is the strong bonds of female networking, with women supporting each other through creative skill-sharing.

WHY THE LONG FACE? Berliners and our Berlin CFs can be quite frosty on the exterior. From shops to bars, don't expect a friendly chat!

HOLISTIC WAY OF LIFE (the sustainable cycle) The neighbourhood streets are lined with parked bikes, vegan / organic cafés, recycle bins and yoga studios. Berliners make considered lifestyle choices, measuring their own consumer footprint and seeking to ladder up to a more natural, meaningful existence. Sustainable, ethical values reign supreme.

“The greatest cultural extravaganza that one could imagine.

David Bowie (on Berlin)



And the **style?**

Casual is king underground, European, understated (darks and neutrals dominate).

THERE'S A BIG VINTAGE / ALTERNATIVE SCENE (too far towards the style fringes for our CFs) but the majority of Berliners have an understated, casual style, aspiring to European fashion.

BERLINERS AREN'T OSTENTATIOUS or flashy about fashion and certainly don't want to look like they're trying too hard. Instead statements tend to be more subtle (i.e. a pop of colour, bespoke jewellery, a subtle logo, an off-beat accessory).

VIVE LES BIRKENSTOCKS The cork-based sandals are having a serious moment. Due to the comfort factor and a wave of German patriotism, the once 'nurses' shoes have become part of the fashion elite and onto the feet of female Berliners young and old.

“I'm affiliated with a network called 'Mompreneurs'. They have weekly meetings, share skills. One women will help me do my website, I'll help her out with copywriting.

Inka, female career coach, Berlin



And the **shopping?**

FROM THE SMALL BOUTIQUE stores of Alte schönhauser Strasse, to the Galleries Lafayette (FF sway) and the sprawling lower-tier fast-fashion malls (more MC), shopping in Berlin is what you make it.

TELL ME A STORY and give me a reason to believe. From small independent boutiques to high-street hitters, in Berlin it's about merchandising a lifestyle. Your product is dead to me if I don't connect with your story (and don't feel inspired by how it makes me a better person and connects to my lifestyle).



FASHION FORWARD PROFILES

This section is dedicated to our Fashion Forward Contemporary Females. We've brought one representative Fashion Forward consumer to life per market and you'll also find an 'FF in a nutshell' spread which covers the key global headlines you need to remember.

My Life

BERLIN

FF NORA BOOKING AGENT

HOW WOULD YOUR FRIENDS DESCRIBE YOU?

I always have an open ear and they can always reach me, day or night. I'm creative, I can make things (like my kitchen bench that you're currently sitting on!). I'm good fun and always up for new things.

WHAT ARE THE THREE ITEMS YOU COULDN'T LIVE WITHOUT?

- My jewellery (gold dinosaur necklace from my best friend, Tiffany's chain from my mum from our NY trip).
- My yoga mat.
- My polaroid camera which I share with my brother. We take photos of things that catch our eye on the street, then mail it to the other to develop.

WHAT ARE YOUR HOPES?

To travel the world. I've already seen many countries but there's

always more places to see, people to meet and adventures to be had. I'd like to learn another language (two isn't enough!).

WHERE IN THE CITY ARE WE MOST LIKELY TO FIND YOU?

Having a picnic in the park with friends, perusing flea markets or window shopping in Kreuzberg, at an exhibition, having brunch at Dalluma, wandering the streets with my polaroid camera or even just in my flat cooking a great dinner with friends, and some great organic meat.

DESCRIBE YOUR STYLE?

Casual, sporty, elegant. Like trainers with a dress. I must feel comfortable in what I'm wearing but also look good, well put-together. Plain, minimalist, those trends are for me.

WHAT'S IN YOUR HANDBAG?

As little as possible. My iPhone 6, water and a book if it fits. There's some store cards in my wallet and a coin purse my friend brought me back from Tibet. My bag is a YSL champagne bucket bag, I just got it back from the menders.



WHERE DO YOU GET YOUR STYLE INSPO?

Lots of places, it's all around. If I see someone wearing something I love on street, usually if you give them a compliment they'll tell you where it's from. That's where I saw my ACNE boots (my big investment). Sometimes favourites are my Nike huaraches (limited edition, they're a little bit different) and my Superga trainers (I buy a new pair every summer).



WHAT'S YOUR SHOE STORY?

I have quite a big, well-organised shoe collection. My go-to favourites are my Nike huaraches (limited edition, they're a little bit different) and my Superga trainers (I buy a new pair every summer).

DOES ECCO SHOES MEAN ANYTHING TO YOU?

I'm not really familiar with the brand, but to be honest the shoes aren't really for me, either quite masculine (I thought they were men's shoes) or too flashy for me. Now I know more, I love the production story, the leather and the Scandinavian heritage. Scandinavia is having a moment, Acne, Wood wood, Bauhaus style.

WHERE DO YOU LOVE TO SHOP?

No one specific place. Sandro is my favourite store, it's the only place I like everything. Beautiful shapes and cuts. Chic. I also like Maje, Acne. &Other Stories is a favourite of mine, I love the collection and stories (by bloggers). But then I shop at Zara and H&M, there's something for everyone.

My Style

BERLIN



SANDRO DRESS

If I had 300 euros I'd buy this dress from Sandro. It's actually more reserved than it looks..!



SUPERGA SHOES

My favourite shoes are my Superga trainers for the weekends. They're so comfortable. They fit with me. I buy a new pair every summer and wear them to death.

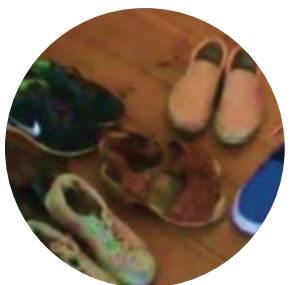


YSL HANDBAG

My handbag is a YSL champagne bucket bag. It's at the menders because the strap is broken. I'll have it for years to come.

STANDING SHOES

I buy shoes in H&M without trying them on. I then get home and realise I can only stand in them. They're in my 'standing shoes' group.



&OTHER STORIES

My &other stories leather sandals are my work staples. They're good quality and look smart without being too dressy. I wear them with dark trousers, a plain top and a touch of lipstick.



"For my birthday all my friends bought me their favourite book, now I have a library."

FF Berlin

My Life

SHANGHAI

FF GUO HR MANAGER

HOW WOULD YOUR FRIENDS DESCRIBE YOU?

My friends think I'm really outgoing and independent. They love to come to me for fashion tips, they're always saying how well I put my outfits together well and ask me for fashion advice.

WHAT ARE THE THREE ITEMS YOU COULDN'T LIVE WITHOUT?

- My handbag – It's Michael Kors and I love it, it's bright pink so always puts me in a good mood!
- My beauty products – staying young and beautiful is the most important thing to me.
- My passport.

WHAT ARE YOUR HOPES?

I want to start my own online clothes store, I think it's terrible you have to set your alarm and work to someone else's schedule. It's so easy, anyone can do it now! As I get older I just want to relax more, to be free of any worries.

WHERE IN THE CITY ARE WE MOST LIKELY TO FIND YOU?

Probably at the shopping mall with friends, we often go for afternoon tea together (I love macaroons!) and have recently started doing yoga. If I'm out with the girls we often go for a hotpot and

then to karaoke, which is always lots of fun!

DESCRIBE YOUR STYLE?

Casual, and sometimes a bit exaggerated. I would never wear anything too formal, the last thing I want to do is look too serious or boring! I love bright colours, they make me feel happy and confident. It's really important that your outfit matches, and anything I buy needs to have a bit of 'bling bling' (bows, sparkle, pattern).

WHAT'S IN YOUR HANDBAG?

I usually change my handbag every day depending on my outfit, it gives me a new mood. Today I've got my Rebecca Minkoff handbag which has got a beautiful gold chain strap, inside you'll find my matching purse, my iPhone 6 (obviously!), and a big bag of make up. Staying beautiful is so important.

WHERE DO YOU GET YOUR STYLE INSPO?

I love to watch people on the street, it's most real, and it's where I get a lot of my Japanese / Korean influences from. I'm always on We Chat which is great for seeing what other people like you are wearing, and I sometimes look online and read magazines to find stuff that



"I want a Mercedes Benz."

FF Shanghai

I might be able to buy.

WHERE DO YOU LOVE TO SHOP?

I love iAMP and K11 malls, both are really fashionable. I always try to go for mid-high end brands - Tata, Stella Luna, Nine West and Michael Kors are great for shoes, they're always on fashion. Ash is also really popular at the moment. If I'm looking for a bag or purse I'll certainly go high end, something like Chanel or Prada.

WHAT'S YOUR SHOE STORY?

Shoes can make an outfit perfect! They have to match so I always choose my shoes to match the outfit I'm wearing. My favourites are my pink Michael Kors flats, they're really bright and have a nice big gold logo on the front. I love wedges as they make me feel taller and make my legs look longer, but I've also got a fair few

"You can't experience the process, know if it suits you or not, if it's good for your personality."

FF Shanghai

My Style

SHANGHAI



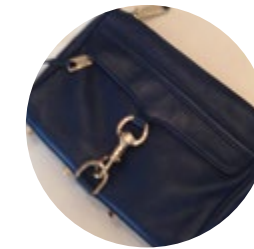
SHOES TO MATCH NAILS

I had just got my nails done blue, and then bought these!



EXAGGERATED

I like to choose exaggerated clothes, I like lots of colours - people think I'm outgoing.



REBECCA MINKOFF

I bought this Rebecca Minkoff handbag because lots of my friends were talking about it!

FOREIGN FASHION

It's from France so it's more fashionable – they have lots of famous designers.



BLING BLING!

I've got more flats since I became a mum as I need to be flexible, but I still like a bit of bling.



STELLA LUNA SHOES

I buy most of my shoes from Stella Luna, they suit office ladies and the high heels are really good.



FREEDOM

"I love Roxy, it's a surfing brand so it's crazy – no restrictions!"

"I throw away my shoes every 12 months."

FF Shanghai

My Life

NEW YORK

FF JENNIFER FOUNDER & MD OF CUPCAKE COMPANY

HOW WOULD YOUR FRIENDS DESCRIBE YOU?

I'm energetic and good fun – I can get my boys off to school first thing, be on the go all day long and still be dancing at a cocktail party that night.

WHAT ARE THE THREE ITEMS YOU COULDN'T LIVE WITHOUT?

- Can I pick my two sons?
- My art – (I've collected lots myself and some of it is by my friends who are artists)
- And my shoes of course. I love these high top sneakers and these \$800 Valentino wedges would be the first thing I'd grab if the house was on fire.

WHAT ARE YOUR HOPES?

My business goes well, my boys turn out nicely and I settle down with a good man in a few years.

WHERE IN THE CITY ARE WE MOST LIKELY TO FIND YOU?

All over the place – rushing between home Upper East side, meetings in Soho and my boyfriend's house on the coast.

DESCRIBE YOUR STYLE?

I rock it. Clothes and shoes aren't there to be worn, you need to rock

them. It's not about blindly following brands. Find your own style – I'm trying to teach my boys to do that.

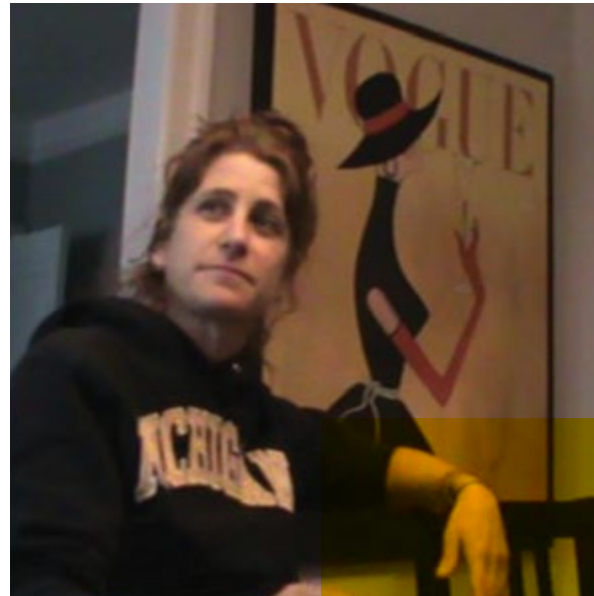
Versatile – right now I'm getting stuff done, packing for the weekend so it's hoodie and sneakers. Over here are my heels and dresses – my company does a lot of catering for posh events so I need to look good for them.

WHERE DO YOU GET YOUR STYLE INSPO?

I'm pretty trendy, pretty fashionable – up with the styles but I have my own niche, a bit rock and roll. I'm quite tuned into that because I used to work in fashion so I see what's going on around me when I'm out around the city. Lots of jogger pants, skinny jeans and high top sneakers with the little heel in them. I'm not really taking inspiration from the people around here on the Upper East Side though – it's a bit too Tory Burch (froofy and girly) for me.

WHERE DO YOU LOVE TO SHOP?

I love shopping in stores. 99% of my shoes I buy in stores. Or I'll see some in store, and then follow them online to see if they go on sale. Like these red Valentinos. They were \$900 in store, and then I



watched them on Bluefly until they went down to \$400 so I bought them.

WHAT'S YOUR SHOE STORY?

I've got a lot of shoes as you can see. There's 4 types here really. Heels, wedges, flats and high-top sneakers, but lots of really similar pairs within each type. Every evening I have to plan out what shoes I need for the next day. I'm out all day so often it's a pair for walking and 2 pairs in my bag. I'm going away for the weekend this evening, and I'm taking 10 pairs – I like to be able to choose and it's difficult at the beach, you need so many different things.

DOES ECCO SHOES MEAN ANYTHING TO YOU?

I've got a couple of pairs of ECCO shoes. I wear them when I take the boys to the ball game because I don't mind getting beer on them.

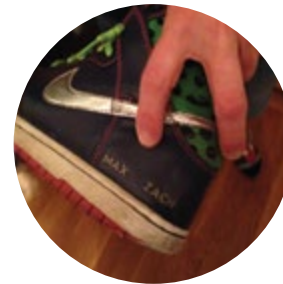
Observation:

"Her apartment was really big for Manhattan and there was lots of art on her walls."

(graffiti, Dali and a huge painting of a Vogue cover)

My Style

NEW YORK

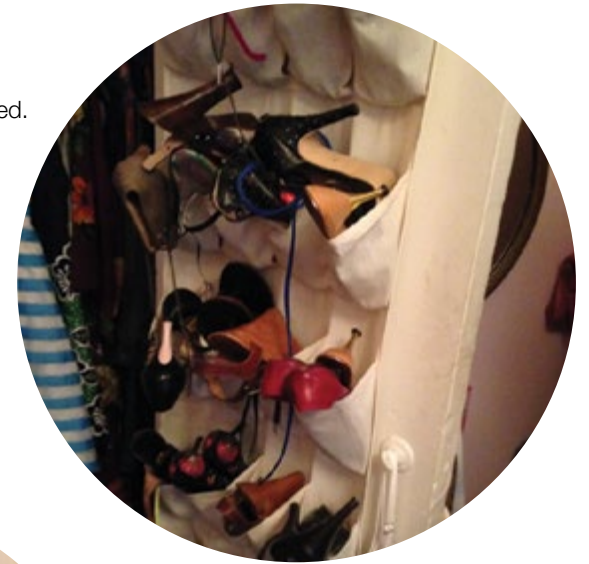


MONOGRAMMED HIGH TOPS

Got all my high tops monogrammed. These are my sons names

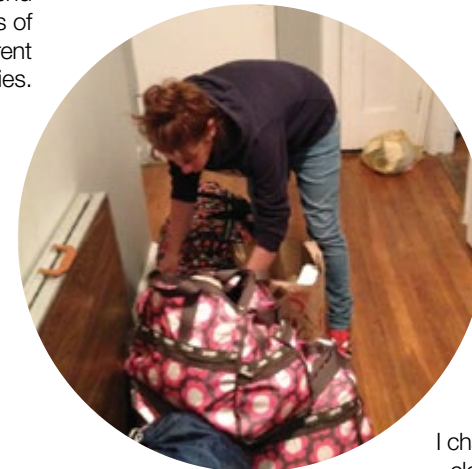
SHOES, SHOES, SHOES

As you can see there are shoes EVERYWHERE.



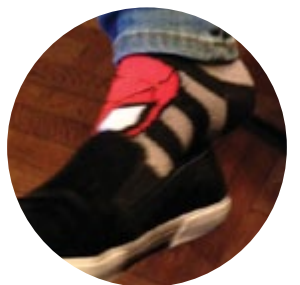
WEEKEND AWAY

Packing for a weekend away. I've got 10 pairs of shoes. You need different shoes for different activities.



HOUSE SHOES

I changed out of work clothes into my vans because I had a lot of stuff to get done at home today. I've just put them on like this by stamping on the backs



HOUSE FIRE RESCUE

If the house was on fire, I'd rescue my Valentino wedges.



"I am a lot like Sarah Jessica Parker. I love fashion and style and I'm a little different."

FF New York

ME IN A NUTSHELL

My Mantra in Life

EXPLORE, DREAM, DISCOVER

3 WORDS TO DESCRIBE ME? Open-minded, kind, creative.

DREAMS AND FEARS? I'd like to expand myself, travel, learn, move forward in my job. One day I'd like to have a family of my own.

MY BIGGEST FEAR? Not being a good friend, staying in one place, standing still and not moving towards my dream.

MOST LIKELY TO BE HEARD SAYING...

I'm looking forward to my next adventure.

Shall I tell you about the most amazing meal I made / restaurant I ate at last weekend?

LEAST LIKELY TO BE HEARD SAYING...

shall we stay in the house and do nothing this weekend?

Reading bores me.

Most likely to be...

Abroad on an adventure, en route to my yoga class, having brunch or drinks with friends, taking photos.

Brands I Love & Why



Tata, Belle, Stella Luna, Ash, Nine West, Michael Kors, Chanel, Prada

"It's pretty exaggerated... like a palace, not too serious" WOOF (Korean skincare brand)

"Favourite shoes are Stella Luna (high stiletto slingbacks)... they suit an office lady, suits my age"



Michael Kors, Steve Madden, Converse, Ugg, H&M

"I can go get my mom yoga-like clothes, plus things I can go out in and even bits I can pick up for the kids" (H&M)



&Other Stories, Cos, Tommy Hilfiger, H&M, Sandro

"I love the stories and the fashion blogger aspect (&otherstories)"

"Sandro is french, plain, elegant, not so obtrusive. Life is complicated enough"

Shopping

I absolutely love to shop, it's one of my great passions

I'm pretty price conscious in general, but I will occasionally spend big on some items (i.e. bags, shoes, trainers, one-off statement pieces)

Things must look stylish. I'm more likely to compromise on comfort for style



I don't want to walk away from buying something and regret it – that's my biggest fear, that I have to track back

My Style

HOW I DESCRIBE MY STYLE...

Casual (I don't want to look like I've tried too hard)

Fits with my lifestyle (busy – work, social, climbing mountains)

I use my style to express my personality

WHAT I WANT MY STYLE TO SAY ABOUT ME ...

I'm a confident, independent woman, who knows how to put an outfit together well.

WHAT I WANT MY FRIENDS TO THINK...

Wow doesn't she look great! She really knows her stuff when it comes to clothes.

My Inspiration & Influences

KEEPING IT REAL

More likely to be inspired by real people: friends, colleagues, social media, street style.

Celebrities are aspirational but too far away from real life, and has to be easy to translate!

Has an always on fashion radar that can be activated

KEY INFLUENCERS

Friends, colleagues, partner

"I need to fit in"

"I want to look different but not too different"

Inspired by specific items and happy to copy by purchasing exact item

68% of instagram's global users are women



There are **11BN WECHAT** user accounts, with the average adult in China spending 40 minutes a day on the platform.



"If you see someone on the street wearing something you like, if you give them a compliment they're usually happy to tell you where it's from. That's how I got my ACNE boots."



"I bought it (Rebecca Minkoff handbag) because my friends were all talking about it."



"My outfit is for me, but the shoes are about him (fiancé). He is my Kanye, he likes neutral shoes."

The Importance of Shoes

WHAT ROLE DO SHOES PLAY? AND WHAT'S YOUR RELATIONSHIP WITH SHOES?

Shoes are fun. They're one of the areas I have a chance to experiment. They can make or break your day (how you feel, act).

Brands are important; a great looking, great feeling shoe can be let down by disliked brand

I have quite a large repertoire of shoes for each occasion – I like to mix it up

Summary of how I feel about ECCO now & why

I haven't heard of ECCO* and it isn't really a brand 'for me'. It feels too masculine, dull and in some cases (new SKUs) like it's trying too hard

*A few older Fashion Forward may have come across ECCO via their partners (those who golf) or bought a pair for their kids – but don't shop there themselves



"Nine West is a very strong tough women, ECCO is the KFC granddaddy"



"These shoes are for 80 year old flight attendants."



"A gay man would wear this. A hipster with a beard and a checked shirt."



MATURE SPORTY CASUAL PROFILES

This section is dedicated to our Mature, Sporty Casual Contemporary Females. We've brought one representative Mature, Sporty Casual consumer to life per market and you'll also find an 'MC in a nutshell' spread which covers the key global headlines you need to remember.

My Life

BERLIN

MC CAROLA HOTEL MANAGEMENT

HOW WOULD YOUR FRIENDS DESCRIBE YOU?

I think they would say I'm kind, relaxed. I'm someone they come to for fashion and general life advice, I'm a great listener and they value my opinion.

WHAT ARE THE THREE ITEMS YOU COULDN'T LIVE WITHOUT?

- Fresh fruit and vegetables (I get up early and make sure my kids have fresh juice).
- A family photo
- A dollar bill, which represents money. Enough income for my family to live well. We have a lot really and we are very grateful for it, compared to those that have less.

WHAT ARE YOUR HOPES?

For my kids to be happy, to find their path in life and to be happy. Once they're older I dream of moving to the coast with

my partner, I don't feel I belong in the city in the same way these days and I crave nature, a little house near the sea...

WHERE IN THE CITY ARE WE MOST LIKELY TO FIND YOU?

In the park with my kids, on the school run or at the mall shopping with the girls (on a Saturday). My partner and I like to get out of the city some weekends (go sailing, walking) and we go for nice dinners together too.

DESCRIBE YOUR STYLE?

I'm fashionable, casual, chic, but I don't chase the latest trends. It really depends on the occasion, I'm quite formal at work, casual (fun) at the weekends with my family but I then like to dress up for my man. I know what suits me and I tailor it to an event. I have fun with fashion.

WHAT'S IN YOUR HANDBAG?

Oh...quite a lot, it's a bit of a dumping ground. A wallet with pictures of my family, and a few supermarket loyalty cards. Tissues, Nivea cherry lipsalve, hand cream. The bag is just something I saw, I liked the colour and extra pockets. I don't think it's by any brand really.



WHERE DO YOU GET YOUR STYLE INSPO?

Actually I get a lot from my daughters, they see something and if it's beautiful instead of buying two we'll share. We go shopping together and do catwalks when we get home and unpack. We're all into trainers at home, I have limited edition Adidas high tops, they're fun. Sometimes I see the way someone at work or walking down the street has put to a look together, or a style of shoe I like. I guess that sinks in too.

WHERE DO YOU LOVE TO SHOP?

As a treat I go to the Malls, Alexa is my favourite. I like Esprit also because they pair things so you can get outfit ideas. To be honest I'm not that complicated, a stylish item, that's good quality and available in my size. I like to have fun and dress up too.

WHAT'S YOUR SHOE STORY?

Shoes are my great love and I have them all over the place. Outdoor shoes by the door, many in my dressing room, some hidden in draws (there's not enough space!). I have wedges and heels for going out with my partner, when I want to feel sexy. I love my Timberland sandals because I can wear them anywhere, from the supermarket to the theatre. For me shoes fit an occasion, but comfort is always important, I'm too old to get blisters so I spend lots of time picking a comfortable pair in store.

DOES ECCO SHOES MEAN ANYTHING TO YOU?

Yes, I have a pair of ECCO shoes I wear at work, black flats. They're really comfortable and have lasted ages. I wouldn't really buy them as a treat for me. They're not interesting enough. I don't go into the shop but I imagine the range is quite dull.

My Style

BERLIN

NIKE FREE

I keep these by my front door, my kids helped me choose them out shopping. I picked them up in an outlet store at a cheap price. I feel energetic wearing them!



CAROLA'S SHOES

My pink and grey Adidas high tops. They're youthful, comfy.



DRESSED TO IMPRESS

I'm quite flexible and able to dress my style up or down. This dark red dress is vintage and I wear it with black wedged heels for a dinner date. These leggings are a bit bit funky and crazy, I wear them under denim shorts

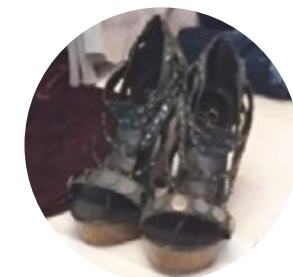


ECCO SHOES

I have a pair of black ECCO shoes. They were 120 euros. They're for work, no frills and easy to slip on.

GOING OUT

When I go out with partner I dress up extra chic. I like it when other men look at me and he can be proud and think 'she's mine'.



"As I get older I don't have the feeling that I must see it all. I'm not searching. I've calmed down. It's a nice feeling"

MC Berlin

"My daughter shows me something beautiful. If we both like it there's no point in buying it twice. We share. Mainly with jackets because she's fatter than me."

MC Berlin

My Life

SHANGHAI

MC CHEN ARCHITECT

HOW WOULD YOUR FRIENDS DESCRIBE YOU?

I think they would say I'm really relaxed.

WHAT ARE THE THREE ITEMS YOU COULDN'T LIVE WITHOUT?

- Imported fruit - it's most natural, to keep my family healthy
- My red Chloe handbag - I bought it in the US and I makes me feel prouder because it's different to stuff in China
- Air Purifier - in Australia they have fresh air and the food quality is very good, everything is natural!

WHAT ARE YOUR HOPES?

In the future I hope just to relax more and to have nothing to worry about. At the moment it's all about the kids, my daughter just went to University in America, it's really important she gets the best start in life and for her to see the world. Once she moves out I'll have even more freedom to do whatever I want - I really want to go to Tibet!

"It doesn't suit me, the girls on the street are a different age."

MC Shanghai

WHERE IN THE CITY ARE WE MOST LIKELY TO FIND YOU?

I'll either be at home with my husband and daughter, or I'll be at the local shopping mall having a coffee or doing a spot of shopping. I'm not always here though, I love to travel - I just came back from Japan for 6 days with the girls!

DESCRIBE YOUR STYLE?

My style is very casual. I think it's important you dress appropriately for your age, so I dress feminine and elegant. I always make sure my clothes and shoes match as it helps you stay looking younger! I like to stay up-to-date on the latest fashions, but I'm more selective than I used to be, I don't need to have everything anymore! The most important thing is that your style "fits" with you.

WHAT'S IN YOUR HANDBAG?

Not too much... it's the bag itself that's so nice. I got this red Chloe bag from America because it's different to Louis Vuitton (which everyone has!) and it has this extra logo on the side you see. It's gorgeous! Oh, and inside you'll find my bright orange Prada purse.

WHERE DO YOU GET YOUR STYLE INSPO?

My daughter always tells



me what's fashionable right now, and I often go shopping with my husband - he likes good quality shoes like Clarks and ECCO so actually I've ended up buying the same brands before. I think celebrities are a bit too far from reality and street style is a bit young for me but I like to chat with friends and colleagues a lot. And of course We Chat, everyone's on it!

WHERE DO YOU LOVE TO SHOP?

I usually go to my local mall, like Grand Gateway, they have everything there. Tata and, Belle are great for affordable, fashionable shoes. Clarks is also pretty good, they're comfortable and fashionable. I love brands like Chanel, Prada and Ester Lauder, they're really high end and luxurious.

WHAT'S YOUR SHOE STORY?

When I was a bit younger I used to have lots of heels and wedges, I've now got more flats because comfort has become more important to me. I would never, ever compromise style though! They have to be fashionable and on trend. I love details so all of my shoes have a little bit of bling or detail on them (bows, patterns, shiny bits), I'd never buy anything plain and boring.

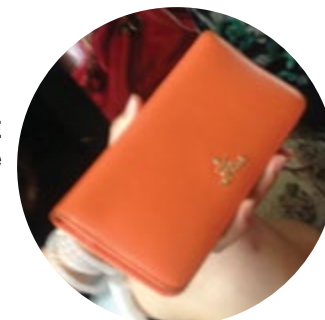
DOES ECCO SHOES MEAN ANYTHING TO YOU?

I bought a pair of ECCO shoes a couple of years ago, the purple ones with the wedge heel. I went in with my husband and they actually looked 'OK' so I bought them. Most of the other shoes were a bit simple for me though, they're not really very fashionable.



ORANGE PURSE

I like bright colours, make me feel happy and confident.

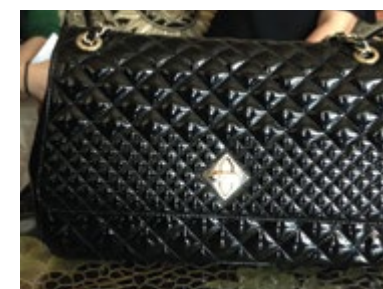


CHEN'S FAVOURITE BAG

Everybody carries Louis Vuitton but I wanted something different. (Chloe handbag)

BRAND ADMIRATION

I love the brand, it suits my personality.



HOW TO LOOK YOUNG

The quickest way to look younger / special is to buy a dress



EXTRA LABELS

I bought this bag because it has this extra coach label on, in China it doesn't - makes me feel prouder because it's different / better than stuff in China.



FAVOURITE BOOTS

These are my favourite boots - they have a great coffee colour, and this special detail around the edge.



"Follie Follie is very fashionable, a famous brand, it never goes out of date"

MC Shanghai

My Life

NEW YORK

MC KATY FULL TIME MUM

HOW WOULD YOUR FRIENDS DESCRIBE YOU?

My friends back home in California used to call me Snow White because of my dyed dark hair and pale face. I'm not sure how my friends here in New York would describe me, we're not that close yet.

WHAT ARE THE THREE ITEMS YOU COULDN'T LIVE WITHOUT?

- My Asian furniture and artefacts which I collected when I was living out there in my 20s.
- My dog, Max.
- My 15 year old tap dance shoes.

WHAT ARE YOUR HOPES?

That my 14 year old daughter Abby does well in her exams and that we move back to a bigger house someday. Maybe back to the West Coast – people are friendlier there.

"I've recently moved from the West Coast because of my husband's job. We switched our big family home for this tiny two bed in Brooklyn."

MC New York

WHERE IN THE CITY ARE WE MOST LIKELY TO FIND YOU?

Brooklyn, looking after my daughter, working from home, or taking Max for a walk.

DESCRIBE YOUR STYLE?

I'm trying to take my style a bit more seriously. Once I let my hair go grey I need to start taking care otherwise I'll look like a hobo. I like to be a bit colourful – everyone in NY seems to wear black. Abby takes care of my style – she's always telling me what to wear or what not to. But I don't listen to her about shoes – I need to get ones that fit properly for my foot problem.

WHERE DO YOU GET YOUR STYLE INSPO?

I decided to pay more attention to my style 4 years ago, my friends got me into Mrs SmartiePants online videos – they give pretty good advice. Nowadays though it's more my daughter Abby who tells me what to wear. We shop together sometimes. My neighbour also gives me old clothes. And then there's my mother-in-law who's always telling me what not to wear!

WHERE DO YOU LOVE TO SHOP? It's a real mix. I do some shopping online. Some at local stores – I got this dress which was



handmade in Brooklyn, that's nice. When I'm shopping with Abby I let her choose. For shoes, it's usually The Walking Company.

WHAT'S YOUR SHOE STORY?

I've always a problem with the arches in my feet and since moving to New York all the walking has made it worse. The Podiatrist has prescribed orthotics for me and I get most of my shoes from the Walking Company. They've

got lots of different brands there, and a machine which shows how they support you so that you know they're good. The staff there understand who I am and my needs.

DOES ECCO SHOES MEAN ANYTHING TO YOU?

I think I had some ECCO sandals before – they felt ok. When I first see the ECCO logo it makes me think of comfortable shoes, probably not that fashionable.

My Style

NEW YORK



KATY'S FAVOURITE SHOES

My favourite shoes right now. The silver colour makes me happy. And I like the way they hug my feet.



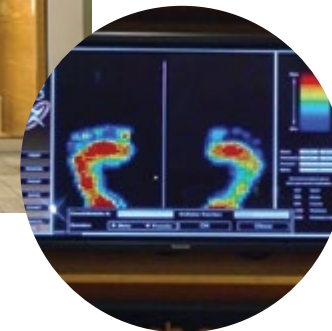
EVERYDAY SHOES

Shoes by the door for everyday wear – walking around, taking the dog out.



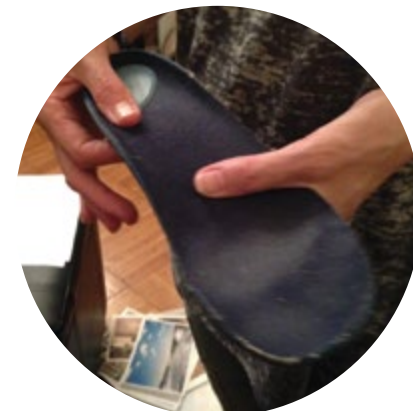
KATY'S FAVOURITE SHOES

I get my shoes from the Walking Company. They have this machine to diagnose what you need.



FEET PROBLEMS

These are the orthotics I have to wear because of my arch problem. I often have to switch them from one pair of shoes to another.



"People in NY seem so much less friendly and they all wear black!"

MC New York

ME IN A NUTSHELL

My Mantra in Life

TREAT OTHERS HOW YOU'D LIKE TO TREATED. A CLEAN HOME IS A CLEAN MIND.

3 WORDS TO DESCRIBE ME? Confident, selfless and young at heart.

DREAMS AND FEARS? To be comfortable, relaxed and keep the family around me happy.

MY BIGGEST FEAR? Being left behind, irrelevant.

MOST LIKELY TO BE HEARD SAYING...
do you want to talk about that?

LEAST LIKELY TO BE HEARD SAYING...
have you seen the designs from the latest Dior catwalk?

Kendall Jenner is fabulous.



"I care about a healthy lifestyle. We eat healthy and drink lots of water. If you live healthy you look good and if you look good, you feel good. It's a cycle."

Most likely to be...

At the organic supermarket, picking up the kids after school clubs, getting coffee with friends, perfecting a new recipe, out on the sailing boat with my partner, on a long outdoor walk.

Brands I Love & Why

I know what I like, and I like what I know.



"Follie Follie is very fashionable, a famous brand, never goes out of date"

"When I first saw Clarks it was all about comfort – they were too simple not fashionable. Now they added little decorations and changed to something good."

Tata, Bata, Belle, Clarks, Este Lauder, Follie Follie, Chanel, Prada



Tamaris, Levis, Esprit, Geox



"Whatever I know fits me well"

Jimmy Choo, Uggs, Fitflop

"I love DSW. It's the Disneyland of stores. I prefer to look at different brands because the brand doesn't matter. If I like it and it fits, it's good enough for me."

Shopping

I like shopping and enjoy going every now and again, but I suppose I've got bigger things going on than fashion these days.

Brands don't mean a lot to me, the right price, style and fit is more important. If it looks good, I don't care who made it. I'm more considered when I go shopping, I don't rush.

Shoes are the serious end of shopping. I know what I need, plan ahead, go alone as it has to be done properly.

I need to touch and feel! I'm looking for quality, comfort and it needs to suit me



"If I see something I like, I'll go home and sleep on it. If it's still on my mind I buy it"

My Style

HOW I DESCRIBE MY STYLE...

Casual, comfortable. I have my own sense of style, it's unique.

My friends come to me for fashion tips and ask to go shopping with me.

The biggest fashion fail would be wearing something uncomfortable that didn't allow me to do what I need to do in my day.

WHAT I WANT MY STYLE TO SAY ABOUT ME / MY FRIENDS TO THINK OF ME...

She's someone who despite her age is always up to date, looks good, but doesn't have to try too hard. She's a natural.



"I see all these people vying for attention. That's not what I care about."

My Inspiration & Influences

KEEPING IT REAL

She has a dormant fashion radar that only really gets switched on when she goes shopping.

She has very few 'saw it, loved it' stories outside of shopping

Occasionally absorbs inspiration from further afield:

How people have styled things on the street (but not isolated items).

Looks to classic powerful women, women of substance (celebrities e.g. Victoria Beckham, Coco Chanel)

TV (Shopping queen, Mrs SmartiePants tutorials)

100% not from...



"Celebrities are too far away from my life... we don't party every night"

KEY INFLUENCERS

Family play a pivotal role and she gets pulled in lots of different directions (daughters, husbands).



"You (mum) don't look good in sneakers, you look like you're trying too hard. How old are you, 46?"

MC's daughter



"I have my own style. My aunt always looked good. Young, modern, fresh. I also see women on the street and think 'that's a good combination.'"



The Importance of Shoes

WHAT ROLE DO SHOES PLAY? AND WHAT'S YOUR RELATIONSHIP WITH SHOES?

Shoes are something I really love and are just for me. They allow me to play around a little (with new and sometimes younger styles).

My collection is quite different for my work

and private life. The weekend shoes are much more 'me' – playful, casual. But I also like to wear heels when I go out with my partner or friends



"Birkenstocks & Uggs; they are beyond my shoes. They are a part of me. They mould into me. I feel like I'm doing the right thing by my foot by wearing them."

Summary of how I feel about ECCO now & why

I'm familiar with ECCO. I know they're really comfortable, a good walking shoe. Perhaps not the most fun or exciting.



"Older fashioned colours (dark brown), for people in their 60's, senior people. Style and colour is important, it makes you feel young."



"ECCO is masculine. I think they are more meant for men."



"ECCO (as a person), a teacher, colourless boring. Jack Wolfskin. My older colleagues would wear ECCO, I'm too chic."



TRENDING #SHELFIES

This section serves as some creative inspiration to bring our insights and the findings from the markets to life.

#SHELFIE

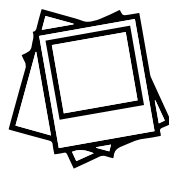
(noun) a bookshelf selfie

2013 was the breakthrough year of the #selfie, and now welcome the rise of the #shelfie, the geek-chic social media trend to artfully show off your book collection, kitchen, bedroom, living room or bathroom.

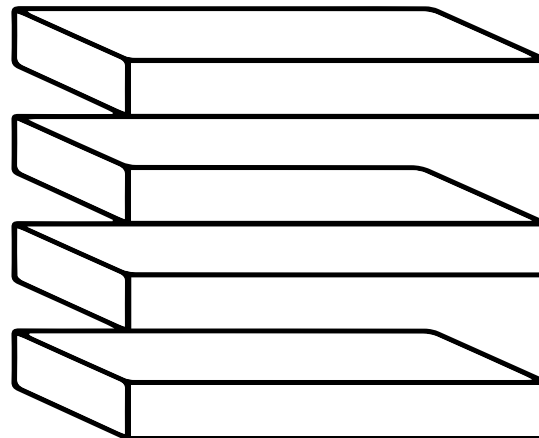
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Currently there are more than 37,000 photographs on Instagram bearing the hashtag 'shelfie' and thousands more on Twitter.



The #shelfie is a symbol of the lifestyle you want portray to the wider world. What better way to bring our Contemporary Female from each market to life? We hope you enjoy the creative inspiration.



#FOREVER YOUNG 🇨🇳



- # Staying young is one of the most important things in Asia, a lot of beauty products go into helping achieve this. But clothes and shoes are one of the easiest ways to stay looking and feeling young!
- # Youthful, almost childlike reflections in style – popularity of Japanese cartoon characters, pinks and childish girl colours
- # Wedges – want to look taller and have long thin legs, like the European models who are so aspirational
- # Shoes are never boring or bland – there's always some colour or detail on them. Fear of looking boring or too serious
- # Being feminine is an expectation of women in china

OLD MEETS NEW 🇨🇳



- # Struggle between the old world of strong Chinese culture and traditions and the new world of high tech, bling bling consumerism
- # It's important to keep up-to-date and have the latest things, that includes the latest iPhone!
- # Luxury brands and big, bold brand logos
- # Bling bling – it's all about the detail – the sparkle, jewels, studs, straps, bows, patterns etc.
- # Michael Kors has it spot on – affordable fashion (feels luxurious), big brand logo, bright colours and bling bling
- # Huge selfie culture, look at me and how great my life is!

BACK TO NATURE 🇨🇳



- # Love of travel, desire to bring back something different, something you can't find in China!
- # Freedom and relaxation is so important
- # Desire to connect back with nature
- # Emerging health and wellness industry (growing awareness), natural and fresh is having a moment – air purifiers (clean air), fresh fruit, juices and smoothies, yoga (holistic wellbeing)
- # Aspirational European lifestyle

CURATED, MINIMALIST ME 🇩🇪



- # Less is more. High quality, unfussy shoes and clothing that make me feel well put together, elegant
- # Retail as a lifestyle platform, you buy products that fit into the life you aspire to lead
- # Connection with nature always present
- # Simple, uncomplicated furnishings. Wood and plain, distressed wallpaper
- # Back to basics
- # Understate, unobtrusive versus trying too hard
- # Younger FF skew (pre-family)

ENTREPRENEURIAL ME 🇩🇪



- # Start-up culture is burgeoning in Berlin
- # Limited edition Nike trainers seen as the ultimate start-up wardrobe armour
- # Self-motivated
- # Creative atmosphere. From hats to woodwork, many of our CFs were craftswomen in their own right
- # Inspired by strong, independent and real women in and around the city
- # Girlboss
- # #EDITION F, the digital home for women who want more – both at work and in life

HOLISTIC ME 🇩🇪



- # The quest for balance in life and the desire to live a clean and sustainable existence
- # Birkenstocks as the ultimate in comfort and flexibility (and now fashion)
- # Yoga as a physical but more importantly spiritual and intellectual pursuit
- # Closing your mind to noise and achieving pure focus
- # # clean eating (veganism and juicing, granola)
- # Cherishing literature and intellectual exploration

YESTERDAY 🇺🇸



- # CFs looking wistfully back at days gone by, a time of possibility when the world was at their feet
- # Holding onto items which anchor them back to their past (leather jackets, record, old photos, ballet shoes)
- # Converse as the ultimate symbolism of youth and rebellion

BASIC BITCH 🇺🇸



- # You're totally different from all your friends because you got your Hunter rain boots in a slightly different shade of black.
- # Our Contemporary Females saw themselves as casually stylish and individual from their friends
- # However, the Trendy Females we met saw them in a different light, best summed up by the rap term 'basic bitch'
- # Your classic basic bitch loves hunter rain boots, pumpkin spiced lattes, brunch and avocado
- # Taylor Swift is the archetypal basic bitch

MOVE TO MOTHERHOOD 🇺🇸



- # Something many of our CFs were struggling with: the demands of being a new mum versus maintaining the fashionable & feminine version of themselves
- # What was once organised is chaotic, weekends that were once spontaneous and free are now planned with military precision
- # Alexander Wang boots hidden safely away in a cupboard, they don't come out as much these days

A person with long dark hair, wearing a grey knit sweater, holds a lit sparkler in their right hand. The sparkler is bright and glowing, with sparks flying out. The background is a solid blue color.

THE VOGUE INSIGHT PLATFORMS

Here you'll find our seven Insight Platforms, collaboratively created by the Vogue team. Each platform is rooted in the unmet needs of the Contemporary Female and is designed to guide the ECCO strategy over the next 5 years. Each is supported by insight, and you can follow the process ladder up to this from the clues we collected in market and the hypotheses we explored. There's also some starter ideas as to where ECCO might take each platform plus a few examples of competitors playing strongly in the space.



Embrace & Reclaim Your Femininity

DESCRIPTION

Whatever their age, this is about our Contemporary Female's reconnecting with and embracing their femininity - whether it's that completely impractical pair of this season's heels, a trace of red lipstick, or wearing your long hair down - it's this touch which tethers them back to who they are at heart and makes them feel confident and happy.

This is like trying to get ready for a date whilst your baby is vomiting/ crying on your shoulder and your teenage daughter is telling you what not to wear.

INSIGHTS

The ageing CF wants clothes and shoes that express her femininity because every year in her life brings a move further away from feminine / sexy, however being a busy mum often demands practicality over fashion.

Younger CFs are prepared to break their own rules (i.e. buy shoes they know won't be comfortable, take taxis to the bar) in order to feel feminine because this makes them feel young, sexy and confident, however currently ECCO has no role to play in this space (they're shoes for men, right?).

THE BIG 'HOW TO' CHALLENGES

WE WOULD LOVE TO SOLVE:



- **HOW TO BUILD AN OWNABLE POINT OF DIFFERENCE AROUND FEMININITY FOR ECCO?**
- **HOW TO DELIVER A 'FEMININE' RETAIL EXPERIENCE THAT CONTEMPORARY FEMALES WANT TO SPEND TIME/SHOP IN?**
- **HOW TO DELIVER AN EXPERIENCE (PRODUCT, PACKAGING, RETAIL ENVIRONMENT, SERVICE, ONLINE) THAT FEELS FEMININE AND CONFIDENT?**
- **HOW TO DESIGN OUR SHOP WINDOWS TO CONVINCE THE CONTEMPORARY FEMALE TO WALK IN?**
- **HOW TO CONVINCE CF'S THAT FEMININITY AND PRACTICALITY CAN GO HAND IN HAND?**

HYPOTHESES

01

Perhaps CFs want opportunities (clothes, shoes) to feel feminine because every change in her world makes her more masculine (ageing, becoming a mum, being manly at work).

02

It seems like femininity is closely linked to confidence and knowing who you are. When you're younger you hide behind sexiness and as you mature you embrace femininity.

STARTER FOR 10:



- **PRODUCT:** UP-WEIGHT FEMININE CUES E.G. SHAPE, COLOUR, DETAILS, HEEL SIZE
- **PACKAGING:** ADD LAYERS TO MAKE THE WHOLE EXPERIENCE FEEL SPECIAL
- **RETAIL:** MORE FEMALE ORIENTED EXPERIENCE E.G. FEMALE STAFF, ENVIRONMENT FEELS LIKE A DRESSING ROOM (WARDROBES, SOFAS, MIRRORS ETC.)
- **ACTIVATION:** COLLABORATIONS AND GIFTING E.G. BEAUTY BRANDS, BAGS/ PURSES, LADIES NIGHT W/SPECIAL PROMOTIONS

When it comes to dating it's all about being feminine. 90% want someone feminine. It's the traditional Chinese way of thinking.

WM Store manager, Shanghai

Girls can hide behind sexy, women cannot

MC New York

MC

Katy, NY

I need to look like I care. I stopped colouring my hair and when you have white hair you need to make an effort otherwise you look like a homeless person!

I feel like I have to look the part for working in bank.

FF New York

I look at her fashion a lot and tell her 'don't wear that belt'. Please get rid of that belt, you know which one I'm talking about.

MC (daughter), New York

These are men's shoes, right? (ECCO collection)

FF Tina, Berlin

A touch of red lipstick is like a little rebellion.

FF Harmony, New York

It covers my stomach, makes me feel slim, makes me feel confident (most feminine outfit).



MC Chen, Shanghai

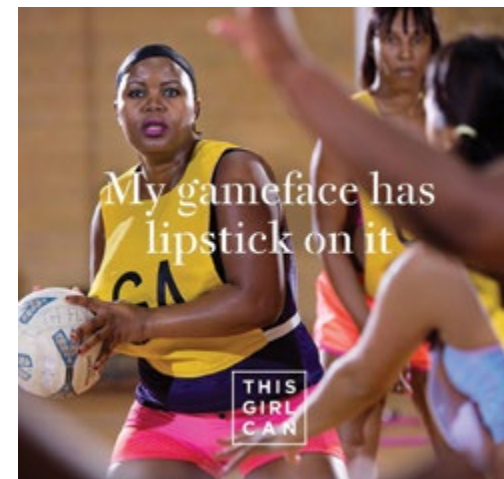
LEADERS in the field

WHO IS DOING THIS WELL? (in shoes)

PRETTY BALLERINAS is a brand of ballerinas and flat shoes launched in 2005. Although the name is relatively new, the shoes have been made in the same village on the Mediterranean island of Menorca by the same family since 1918. Each shoe shape is named after a female screen or music icon to help customers remember which shape suits them best. SKU's range from classic and plain to more adventurous.



WHO IS DOING THIS WELL? (outside of shoes)



THIS GIRL CAN is a national campaign developed by Sport England and a wide range of partnership organisations. It's a celebration of active women up and down the country who are doing their thing no matter how well they do it, how they look or even how red their face gets.

SWEATY BETTY is a UK women's active wear brand, specialising in yoga, beach and snow apparel. It's purpose is to inspire women to find empowerment through fitness'. The name Sweaty Betty was chosen as an actively polarising name with 90% of women liking it and 90% of men disliking it.





DESCRIPTION

Contemporary Females want to stand out from the crowd... but not so much that she puts herself at risk of judgement or criticism. The world around her is constantly challenging her identity – from the pressures of work, to what her husband and daughter tell her to wear – so it's important that she visually distinguishes herself from the people around her. The worst thing would be to feel anonymous. However, she lacks the confidence and real fashion know-how to take too much of a style risk. As such, it's the little acts of rebellion she looks to – the small silver studs on her black work dress – that are vital to maintain her sense of individualism.

It's like when your friend shows up for dinner with the same bag as you but you prefer the colour and style yours is in.

LEAD INSIGHT

When choosing an outfit, Contemporary Females want little cues to visually distinguish themselves from the people around them because this shows they are more than just a carbon copy member of the group but they mustn't go too far as they still want to be included.

SUPPORTING INSIGHT

Contemporary Females struggle to find the fashion sweet spot (the 'magic' outfit) because every day to day situation brings an expectation of how she should look (her husband at home, her boss at work, strangers at the gym), however in trying to please everybody she ends up feeling more lost than ever.

Contemporary Females want to be able to add personal touches to their clothing / shoes because this allows them to feel they're walking away with something that expresses who they are, however they lack the fashion bravery / creativity to put themselves out there. Nothing's worse than trying too hard (and missing the mark entirely).

STAND OUT BUT FIT IN {IT'S IN THE DETAIL}

HYPOTHESES

01

Perhaps the CF wants an outfit to look natural and easily thrown together because they don't want people to know how much effort they have put in or how much they want external affirmation.

02

It seems like in social situations, Fashion Forward contemporary females are desperate to ensure their shoes fit with the tribe they aspire to because shoes (and handbags) are the clearest signal of which group they belong to.

THE BIG 'HOW TO' CHALLENGES

WE WOULD LOVE TO SOLVE:



- HOW TO HELP THE CONTEMPORARY FEMALE FEEL LIKE SHE BELONGS TO THE ECCO TRIBE?
- HOW TO HELP OUR CF FEEL LIKE SHE'S MAKING A STATEMENT IN A SUBTLE WAY?
- HOW TO DELIVER THE LITTLE DETAILS (PRODUCT, PACKAGING, SERVICE) THAT MAKE HER FEEL DIFFERENT AND UNIQUE?
- HOW TO DELIVER LITTLE ACTS OF REBELLION THROUGHOUT THE ENTIRE ECCO EXPERIENCE?

STARTER FOR 10:



- **PRODUCT:** SHOES THAT MAKE A STATEMENT IN A SUBTLE WAY
E.G. LOUBOUTIN RED SOLES
- **PACKAGING:** LIMITED EDITION BOXES FOR SPECIAL LAUNCHES
- **RETAIL:** STORE UNIFORMITY BUT WITH SMALL (LOCAL) INDIVIDUAL TWISTS, SEND LACE REPLACEMENTS TO TWIST / REINVENT SHOES EVERY 6 MONTHS (ALSO A REMINDER TO PURCHASE AGAIN!)

As long as I'm middle to upper in my group that's OK

FF Shanghai

My colleagues style effects me but I am different

MC Shanghai

I have a friend, she's a personal stylist. Her clothes are really out there. Not for me

FF Berlin

I have Nike IDs, they were a present. I don't wear them they're a bit too out there

FF Berlin

I hate someone wearing the same clothes as me, it's so awkward. I want to be different, but not that different

WM Retail music director, NY

My friends and I are all so happy Birkenstock's are back in fashion. I have the white ones with two straps

FF Berlin

Shoes are the no1 indicator of your social bracket.

WM Retail music director, NY

My own twist makes me feel empowered, rebellious and in control

FF Harmony, New York



Elena, Berlin

I don't like to call attention, I've never even hosted a party!

LEADERS *in the field*

WHO IS DOING THIS WELL? *(in shoes)*

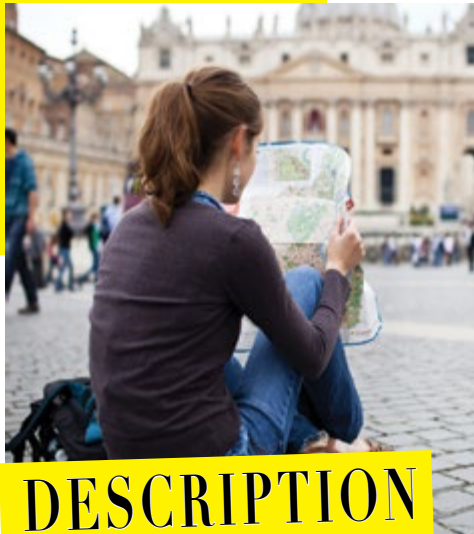
With over 50 colours of **ADIDAS SUPERSTARS** (launched earlier this year), you can show your true colours. The range was designed in collaboration with Pharrell himself to boot.



WHO IS DOING THIS WELL?
(outside of shoes)

Danish jeweller **PANDORA'S BRACELETS** allow the wearer to add the charms they love, with a range of over 600+ options. Revenue from charms and bracelets increased more than 25% in 2014.





MADE TO EXPLORE



DESCRIPTION

Life is complicated, unpredictable, exciting. The Contemporary Female wants to be ready for it. She wants the freedom to be impulsive, to change plans throughout the day and feel free to enjoy whatever life throws at her, knowing that nothing (particularly not her outfit or shoes) is going to hold her back. With a curious mind and a passion for travel, she seeks out experiences and connections (rather than faceless possessions) and looks for shoes that give her the freedom to discover and explore.

It's like you've met your friend for an early coffee and a Sunday stroll in a new part of town. You've worn your new pair of sandals and by 11am you're stopping for plasters and you want to cry.

LEAD INSIGHT

Contemporary Females want the freedom to be impulsive and embrace whatever the day might throw their way but all too often she feels like her outfit or shoes end up holding her back.

SUPPORTING INSIGHT

Contemporary Females need shoes that deliver on comfort and work for (not against) them over the course of a busy day because they can't afford to have their shoes holding them back.

Contemporary Females want shoes that act as a stylish backdrop from morning to evening because it's important to look good and in control while constantly on the go, but there's very few shoes in her wardrobe that deliver, so she suffers the bulk of an extra pair in her bag.

THE BIG 'HOW TO' CHALLENGES

WE WOULD LOVE TO SOLVE:



- **HOW TO CONVINCE CF'S THAT ECCO IS THE GO-TO TRAVEL SHOE, MADE FOR EXPLORING?**
- **HOW TO DELIVER SHOES THAT MAKE YOU FEEL READY FOR ANYTHING THE MOMENT YOU SLIP THEM ON?**
- **HOW TO CONVINCE CF'S THAT WITH ECCO YOU DON'T NEED AN EXTRA PAIR OF SHOES IN YOUR BAG?**
- **HOW TO MAKE ECCO THE FASHIONABLE BACKPACKS OF THE SHOE WORLD?**

STARTER FOR 10:



- **PRODUCT:** SHOES TO ENJOY OUTDOORS (EMBRACING PRACTICALITY), THE GO-TO TRAVEL SHOE, THE MOST COMFORTABLE SUMMER SANDALS, A SHOE THAT REALLY LASTS.
- **ACTIVATION:** COLLABORATIONS WITH OUTDOORS OR SPORTS BRANDS E.G. SWEATY BETTY. NORTH FACE, HERSCHEL. PROMOTION WITH POLAROID E.G. PHOTO COMPETITION / CAMERA GIVEAWAY.

HYPOTHESES

01

Perhaps comfort gives you freedom of movement, whereas style gives you freedom of expression.

02

It seems like Contemporary Females want to feel free to do whatever they want because they want to feel independent and create their own experiences.

You climb mountains, you can't wear high heels – women have lots of requirements in their lives these days

WM Store Manager, Shanghai

Comfortable shoes are the ones I can wear all day

MC NY

I want to own my own store to have freedom – I think it's terrible you have to set your alarm all the time

FF Shanghai

Shanghai women want freedom, personal independence, they want the experience and connections, not climbing the corporate ladder

WM Career Coach, Shanghai

I often carry an extra pair of shoes in my handbag. I'll walk up to about two blocks away from my meeting, then switch into my heels. I'm always terrified someone I know will see me!

MC NY

I can go when I want to go, I can do whatever I want to do

WM Career Coach, Shanghai

The ease of life is not having to think" (she was stressed about planning outfits and multiple shoes the night before when she had A complex day with walking and a need to look smart)

MC NY

If I had a free day to myself I would just go to a random city and explore, get lost, find myself again

FF Berlin

LEADERS in the field

WHO IS DOING THIS WELL? (in shoes)

The Brazilian flip flop brand **HAVAIANAS** evokes a sense of adventure, flexibility and discovery. Their bright and diverse range plays on colour and nationality and the lightweight design makes them sidestreet to beach transferable.

FJALLRAVEN is an outdoor apparel company that started life 50 years ago. Its products are inspired by nature and come with a durability promise. Profiting from the boom in adventure travel and through some clever retail collaborations (asos, pop-up stores), they've become the go-to backpack of travel junkies and fashionistas alike.



WHO IS DOING THIS WELL?

(outside of shoes)

EASYJET'S low prices and expanding network of destinations heralded the democratisation of air travel which has meant everyone is able to do more of the things they love – whether it be exploring new holiday experiences, new business opportunities or visiting friends and family.



Holistic Me

DESCRIPTION

Contemporary Females want to slow down and connect with the more simple, easy-going and relaxed lifestyle they aspire to, in order to counterbalance the fast pace and uncertainty of the modern world. For the CF, success is all about finding balance in a world where much is demanded of them and many different pressures are placed upon them. They are mindful of their wider place in the world and achieving this balance allows them to feel a sense of control and accomplishment. As such, they seek products that 'fit' with them, reflecting their values and the lifestyle they aspire to.

It's like asking your friend to meet you at a new vegan café to show you support their values, but being really scared she won't like it there...

LEAD INSIGHT

Contemporary Females need to be centred and in control because they're the lynchpin that lots of people rely on (kids, friends, colleagues), but with lots of pressures it's often hard to get the balance right.

SUPPORTING INSIGHT

Contemporary Females want products that connect them to the more holistic, considered lifestyle they aspire to because this allows them to feel one step closer to achieving the perfect balance, but there are so many products out there it's difficult to know what's genuine or not.

THE BIG 'HOW TO' CHALLENGES

WE WOULD LOVE TO SOLVE:



- HOW TO MAKE ECCO THE 'YOGA MAT' OF SHOES? (A REFLECTION OF THE LIFESTYLE YOU WANT TO LEAD)
- HOW TO HELP THE CF FEEL 'GOOD' ABOUT BUYING ECCO SHOES ON MULTIPLE LEVELS (SUSTAINABILITY, VALUE, ETC.)
- HOW TO CONVINCE OUR CF SHE IS BUYING INTO AN ASPIRATIONAL LIFESTYLE WHEN SHE BUYS ECCO? (BUILDING ON ECCO'S ASPIRATIONAL EUROPEAN LIFESTYLE AND SCANDINAVIAN DESIGN CREDENTIALS)
- HOW TO DELIVER A BRAND EXPERIENCE THAT REASSURES OUR CF SHE IS INTERESTING AND HAS LOTS GOING ON IN HER LIFE?
- HOW TO BUILD A CONNECTION BACK TO NATURE FOR OUR CF?

STARTER FOR 10:



- **PRODUCT:** SHOES THAT FEEL LIKE A NATURAL EXTENSION OF OUR CF E.G. LIGHT, MOULDED
- **PACKAGING:** A BOX THAT YOU PLANT TO GROW SOMETHING (LIFECYCLE)
- **RETAIL:** ENVIRONMENT THAT REFLECTS THE ASPIRATIONAL DANISH LIFESTYLE

HYPOTHESES

01

Perhaps the Contemporary Female sees a good balance (life, work, kids, travel) as a fundamental component to her wellness and make it her priority. Perhaps retailers that connect to this are aspirational?

02

It seems like Contemporary Females want to slow down and enjoy a relaxed, easy-going lifestyle to counterbalance the fast pace and uncertainty (constantly changing) of the modern world.



Popularity of yoga in New York, Berlin and Shanghai (mental benefits talked about).



The number of people trying to find inner peace, or maybe just fitness and flexibility, through yoga soared to 24.3 million in 2013, a 37% climb in six years, according to the Sports and Fitness Industry Association.

WM NY

I love my CK sheets. I have to make my bed. Important to have ordered at the start of the day. If you go out with unmade bed then I feel I'll have a chaotic day.

FF NY

Instances of giving shoes to friends, mending them at the cobblers, selling on eBay or taking to charity shops (no throwing away!)

Berlin

Observation: above fashion, Voo store Berlin was selling a lifestyle (candles, yoga books, passport covers and Chloe handbags).

ECO-living is a movement in Berlin, not a trend.



Folk day, Waymarker, Berlin

The most important thing is to live a relaxing life, nothing to worry about.

MC Shanghai

LEADERS in the field

WHO IS DOING THIS WELL? (in shoes)

POZU SHOES has a 360 degree approach to ethical manufacturing. They use organic cotton, their leather is chromium-free and they've recently introduced a vegan, solvent-free eco microfibre. Their shoes are made in a small factory near to the historic town of Guimaraes in Portugal. A country derives over 70% of its energy from renewable sources. Pozu ship by land and whenever possible, by sea, saving approximately 15 tons of CO2 a year.



WHO IS DOING THIS WELL?

(outside of shoes)

METHOD'S dish and hand soap is made from a blend of recovered ocean plastic and post-consumer recycled plastic. Their Beach to Bottle campaign saw them team up with local beach clean-up groups to collect plastic debris from the beaches of Hawaii

HEADSPACE is a meditation app with over a million users. The app, has been downloaded by people in 150 different countries and even has an army of celebrity fans including Emma Watson and Gwyneth Paltrow. They all swear by the soothing 10-minute bites of daily "timeout" prescriptions.



LOOK HOW FAR I'VE COME

DESCRIPTION

Our Contemporary Female seeks pieces in her wardrobe (particularly trainers) that help tie (or anchor) them back to their youth because this is a happy place full of potential and possibilities, but also provide a reference point for how far they've come. It's about progression, both inwardly recognising you're succeeding and outwardly demonstrating this to others through your style, often via 'upgraded' purchases, be that an expensive handbag or 'moving up' to a new brand. It's a style celebration of opening / closing a new chapter and reflecting on the journey you have been on to get where you are now.

The road to success is always under construction, it's nice to look behind and remember where you've been.

LEAD INSIGHT

All contemporary females want to wear (or just keep) things that help to anchor them back to their youth because it's a personal memento of how far they've come, but it's where they're headed next that is actually far more exciting.

SUPPORTING INSIGHT

Contemporary Females make 'upgraded' purchases as a personal memento and outward signal of moving into a new chapter in their lives, however they still need rational justifications for splurging (i.e. aspirational brand, high quality cues, on discount). Fashion forward contemporary females want versatile stalwart casual items (often nostalgic ones from their past) for weekend errands because it's no fun to spend your free time thinking about what to wear, but these items get so much use they can become scruffy.

THE BIG 'HOW TO' CHALLENGES

WE WOULD LOVE TO SOLVE:



- **HOW TO REASSURE CF'S THAT ECCO IS ON THE JOURNEY WITH YOU (YOUR TRUSTED COMPANION)?**
- **HOW TO DELIVER AN IN-STORE AND ONLINE EXPERIENCE THAT FEELS LIKE AN JOURNEY (ANTICIPATION, EXCITEMENT ETC)?**
- **HOW TO HELP THE CF FEEL CONNECTED BACK TO HER YOUTH?**
- **HOW TO MAKE THE WHOLE ECCO EXPERIENCE FEEL LIKE A CELEBRATION OF WHERE YOU'VE GOT TO / WHERE YOU'RE GOING?**

STARTER FOR 10:



- **PRODUCT:** TAKE POPULAR DESIGNS FROM YEARS AGO AND USE AS INSPIRATION FOR NEW SNEAKER COLLECTION E.G. IF ECCO DID THE CONVERSE HIGH TOP..., BRINGING BACK OLD CLASSICS
- **COMMS:** YOU SHOULD BE PROUD OF THE JOURNEY, BLAST FROM THE PAST
- **RETAIL:** OFFERING CUSTOMISATION INSPIRED BY RETRO TRENDS

HYPOTHESES

01

It seems like Contemporary Females want ties back to their youth (through nostalgic items like their old Converse trainers) because this is an indicator of where they've been and how far they've come.

02

It seems like Contemporary Females want to stay feeling young because this is a time full of possibilities and opportunities (careers, travels, partners etc.)

Shopping is the only time I can feel like a human being again.

MC Shanghai

They're not super comfortable physically, but they make her feel right, they're what she wore when she was younger.

WM (On Converse) Fashion Blogger, NYC

She was very affluent (had a town house in city centre) but wore a pink 90's Converse t-shirt.



Kathleen 48, Berlin



Had a pair of tap dance shoes in her wardrobe but had not danced in 15 years.

MC NY



You can not avoid getting old but you can delay it... I watch popular Korean TV shows even though I don't like them to be able to talk with my younger colleagues.

MC Shanghai

Staying young is important to me – not just in appearance, but also staying young on the inside

FF Shanghai

Casual clothing makes me look young and energetic.

MC Shanghai

LEADERS in the field

WHO IS DOING THIS WELL? (in shoes)



CLARKS: REBOOTED – To celebrate 65 years of our Clarks Originals Desert Boot they teamed up with the HALO trust and 14 global artists, asking them to each design a limited edition version of our iconic boot for the Clarks: Rebooted collection.

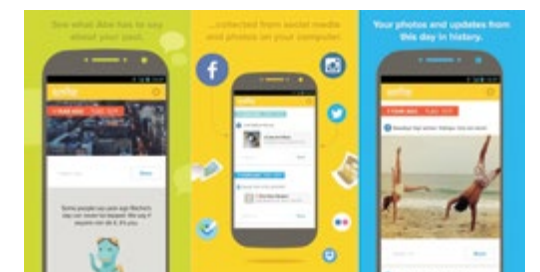
JOHN LOBB shoes will send you a new pair of laces on the one year anniversary of your purchase.



WHO IS DOING THIS WELL?

(outside of shoes)

TIMEHOP brings together your old photos and posts from your phone, Facebook, Instagram, Twitter, and Foursquare accounts. Share and discuss your moments with friends, reconnect over the past





I'M A FASHION LEADER

Shortcuts to style

DESCRIPTION

Contemporary Females want to feel like they're one of / the style leader(s) within their 'tribe' because discovering something new before everyone else helps them feel young / valued / relevant. In reality though the CF is not a confident trendsetter, and so defaults to style shortcuts (matching colours, well known brands, safe options) and seeks style inspiration in order to have interesting stories to tell (social currency).

It's like buying an outfit that you know people are going to complement you on as soon as you walk in the office.

INSIGHTS

The Contemporary Female wants to be seen as the fashion leader in her group and be consulted on all things shopping / style because she wants to feel like she's still relevant, however she's happy riding the fashion wave (mainstream trends / brands) rather than swimming further out to sea and seeing what's coming up.

Contemporary Females look for fail safe shortcuts to reaffirm their style choices / taste in fashion because they lack confidence in truly putting together an outfit from scratch.

THE BIG 'HOW TO' CHALLENGES

WE WOULD LOVE TO SOLVE:



- **HOW TO GIVE CF'S THE SOCIAL STYLE CURRENCY THEY ARE LOOKING FOR?**
- **HOW TO CONVINCE OUR CF THAT ECCO IS YOUR HELPING HAND FOR GETTING IT RIGHT?**
- **HOW TO GIVE THE CF THE SHORTCUTS SHE NEEDS TO FEEL CONFIDENT IN-STORE?**

HYPOTHESES

01

It seems like there are shortcuts to style that give her a base level of confidence in her look.

- Accepted retailer – i.e. it must be OK if Zara sell it
- Ability to match, rules of matching (Shanghai)

02

It seems like MCs (and FFs less so) believe they are the style / lifestyle leaders among their friends, but they in reality don't really know much at all / are actually a bit lost.

Matching shoes and outfit is very important to me.

Shanghai

She talked about boutique stores but all her clothing was from high street brands.

FF Elena, Berlin

I dress for myself Harmony and Jessica (but brand dropping when empties her handbag)

WM NY

My friend calls me and says hey Maria, what shoes are on fashion this season. I say..... Boots. She stopped calling actually.

MC Maria, Berlin

Basic Bitch = curly hair, manicure, Zara, Isabel Marant, reads Elle and Vogue, loves Taylor Swift.

WM Sarah, Waymarker NY

To be honest sometimes I feel like I'm the leader. I wear a hat and two years later someone else is wearing it.

FF Tina, Berlin

I like to be unique but still seek input on my style from colleagues / friends

Shanghai

LEADERS in the field

WHO IS DOING THIS WELL? (in shoes)

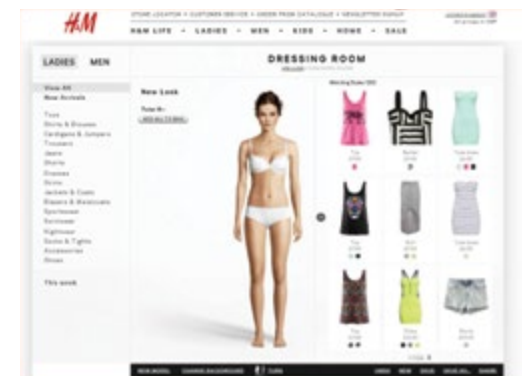
NINE WEST in China are doing a great job of 'hot picks', 'what's popular' and 'limited edition' to signpost to consumers what's hot right now and what they should buy if they want to be 'fashionable'.

JIMMY CHOO has collaborated with H&M making the consumer feel confident the rest of the products are on trend.



WHO IS DOING THIS WELL? (outside of shoes)

H&M DRESSING ROOM online allows you to mix and match outfits, offering a helping hand in putting them together, to help reassure you're doing a good job when putting outfits together.





I've arrived

(Quiet confidence)

DESCRIPTION

Whereas it feels like our Fashion Forward's are still finding themselves and defining their style, our Mature Casual's have a developed a quiet confidence over the years and know what works for them. Sometimes this means opting for more risqué style choices then they would have felt comfortable choosing when they were younger, but also being confident in their decision to rate practicality more highly.

It's like talking to your married friend (who is staying in this weekend) about your new leather trousers. You're going to go out with the girls to a new cocktail bar, on Saturday, see where the night takes you...

LEAD INSIGHT

Contemporary females want to find their own style rather than blindly following trends because this shows they've got more going on in their lives, however they still want to look good and receive compliments from others on their style.

SUPPORTING INSIGHT

Some mature casuals want to experiment with the clothes they didn't wear when they were younger because they have a relaxed confidence in who they are now which can't be burst by one outfit fashion faux-pas.

THE BIG 'HOW TO' CHALLENGES

WE WOULD LOVE TO SOLVE:



- HOW TO DELIVER A QUIET CONFIDENCE THROUGH ALL TOUCH POINTS FOR THE ECCO BRAND?
- HOW TO DELIVER THE FEELING OF 'I CAN DO WHATEVER I WANT, WHENEVER I WANT' WHEN BUYING ECCO SHOES?
- HOW TO HELP OUR CF FEEL LIKE SHE'S ARRIVED AS SOON AS SHE WALKS THROUGH THE DOOR TO AN ECCO STORE?
- HOW TO HELP OUR CF FEEL CONFIDENT IN CHOOSING A MORE PRACTICAL FOOTWEAR SOLUTION?

STARTER FOR 10:



- **BRAND:** PORTRAY QUIET CONFIDENCE THROUGH ALL BRAND TOUCH POINTS – CRAFTSMANSHIP, QUALITY ETC.
- **COMMS:** COMFORT AS THE LEAD, STYLE AS 2ND (PLAYS NICELY TO ECCO'S CAPABILITIES). INSPIRATION NOT EDUCATION.

HYPOTHESES

01

It seems like Mature Casuals are more confident / defined in their style than FFs.

02

FFs have less responsibility & commitments – so more room for fun & experimentation. MCs have already experimented and knows what works well for them.

I used to have the feeling that I was always searching for something. This is getting less so.

MC Berlin

My ACNE ankle boots. They were expensive (300 euros) but they're worth it.

FF Berlin

She remembered what she wore to her first job interview – Steve madden heels around \$80, thought that was expensive then.

FF New York

The most important thing is to find themselves and know themselves, balance - a successful woman in life and family.

WM Beautician, Shanghai

In your 30s it's everything I need to have, now. In your 40s you start to become more selective and make choices.

WM Career Coach, Shanghai

My style has become more crazy. Faux leather skirts, I'm not afraid to wear a jumper with fur on it. It's nonsense but it fits with me somehow.

FF Berlin

I don't have a preference on brands, it's more important it suits me and makes me feel feminine.

MC Shanghai

I'm dressing younger now I'm older. I wear bikini/leather pants now which I wouldn't have worn when I was younger. But now I'm more confident. I know I don't have to be only 100lbs, I can wear that.

MC NY

LEADERS in the field

WHO IS DOING THIS WELL? (in shoes)

CLARK'S are arguably the leaders in modest excellence. The British shoemakers, founded back in 1825 have built a longstanding reputation for quality and craftsmanship. By experimenting with materials, they've worked hard to keep their brand fresh to appeal to young modern women, while staying true to their core values. The 'originals' are a popular range among celebrities, with Suki Waterhouse, Florence Welch, Alexa Chung all spotted out and about in theirs.



WHO IS DOING THIS WELL? (outside of shoes)

In 2014 a brave campaign by **CANCER RESEARCH UK** invited women to remove all of their makeup and post a selfie on social media. The campaign raised a landslide £8m in 6 days and encouraged women worldwide to drop the beauty hang-ups (if only for a day) and pose with confidence.





WHO WE SPOKE TO

Each of our eight contemporary females and the waymarkers has an individual profile in this section. It's a great place to explore some of the granular details behind their individual stories and get further under the skin of each market.



FF

CHEN SHUWEN

INDIVIDUAL MARKET PROFILE

"Most important thing in my life is feeling young, anti-ageing... I worry about getting older and fatter"

"Local brands are not as good as European"

"I want to work on my own (own online fashion store) gives me freedom, I think it's a terrible thing you have to set an alarm all the time"

"To a girl I think beautiful is the most important thing... also healthy. There are lots of work opportunities if you stay beautiful"

"You don't need to be rich, as long as in your friends you are middle / a bit upper"

"I always keep up to date with fashion and always buy the latest thing"

Bought a Tesla car for 1m Yuan, "it feels great – sometimes people ask out my window what is it, they say 'oh wow!', it's not super high end but pretty much when you look at it it looks so great!"

"I dress myself very shiny, people think I'm outgoing" (chose 'crystal' to represent herself)

"Magazines are all dressed by models, not suitable for everyone, I like to watch people on the street, it's most real"

"Want to feel relaxed, happy – when you dress bright you feel happier, when you dress simple you feel a bit dull / ugly"

QUESTIONS?

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