

Inge Lehmann
Email: il@whitakerintl.com
Fatima Whitaker
Email: fw@whitakerintl.com
Office Hour: By Appointment

Visual Aesthetics and Style in Retail Merchandising Mktg 392/792

Overview

It is crucial for executives in the retail industry to have an innovative approach towards understanding their consumer in order to develop new business.

This course provides deep insights on how to understand the potential of Global Lifestyles and their segmentation possibilities, in order to anticipate and predict Consumer needs and aspirations.

Consumers today, more than ever, are presented with the widest set of choices to express themselves. Be it through clothing, accessories, personal electronics and technology, and home decor. For the first time in our civilization, Consumers have the freedom to be anything they want to be and nothing can be imposed on them. Consumers may be eclectic or build their own niches to position themselves in the world. The growth of Lifestyle niches is forcing retailers to re-evaluate their businesses and potential growth opportunities in different areas. Only by learning who their consumers are and how to fulfill their needs, retailers are able to understand their style preferences and predict their choices - as well as foresee new lifestyle opportunities.

This course is a visual and practical approach to understanding global styles and it involves readings, active participation in the creation of lifestyle boards, brand books, exercises to develop all the senses and the development of a total style concept. Students will be exposed to the Whitaker Lifestyle Segmentation of the Global Consumer system and will learn:

- Understanding consumer lifestyles and their effect in retailing.
- How to anticipate and predict consumers needs.
- How to identify and create innovative retail concepts and brands.
- How to communicate to a target lifestyle effectively
- Develops creative and intuitive side of retailing.

In addition, students will critically evaluate this style segmentation system and compare it to other segmentation approaches. This course is relevant for students interested in developing their intuition and creativity and in so gain a competitive advantage in the business environment. The topics of this course are a foundation for anyone working in any area of the retail industry: marketing, merchandising, visual merchandising, store design, planning, advertising, etc.

As way of background, Whitaker International is a Retail Strategic Planning firm, founded in New York in 1992 by Fatima Whitaker, with a clear mission to bring integration and clarity to all areas of a retail company, based on “Who is the Target Customer”, through a unique visualization method of identifying consumers by style preferences versus age and demographics. The company provides training programs on Brand Positioning and Lifestyle Evolution to retailers with a multi brand portfolio of market brands as well as private labels such as Macy’s, Nordstrom, JCPenney, as well as 100% private label companies, such as Esprit in Germany, C&A in Europe and Brazil, Renner in Brazil and Suburbia (Wal-Mart)in Mexico. Whitaker has also worked with Brands such as Perry Ellis, Kenneth Cole and Calvin Klein amongst many others. Whitaker also trains and implements the whole process of product development, marketing and visual merchandising of Private Label Development from concept to the sales floor. Whitaker advises on marketing strategies, advertising campaigns helping clients integrate all of their efforts and keep the brands consistent with their target Consumer Lifestyles. Please visit our website at www.whitakerintl.com

Course Materials

Course work consists of reading before classes, active participation in class discussions, several lifestyle and sensorial exercises during class, one short essay, and creation of lifestyle boards, brand book, and final lifestyle concept.

The readings can be found in the webcafé.

We have selected the most relevant chapters; however we strongly recommend that students read the entire books in order to acquire a general understanding of branding in the fashion industry.

These reading are optional:

1. “The Evolution of Desire” by David M. Buss
2. “The End of Fashion” by Teri Agins
3. “Luxury Fashion Branding” by Uche Okonkwo
4. “Deluxe - How Luxury lost its Luster” by Dana Thomas
5. “The end of Marketing as we know it” by Sergio Zyman
6. “No Logo” by Naomi Klein
7. “Emotional Branding” by Marc Gobé
8. “Trading Up” Michael Silverstein
9. “The Overspend American” Why we want what we don’t need - by Juliet B. Schor
10. “Richistan” by Robert Frank

Grading and Assignments

The grading of this course will be done by Fatima Whitaker and Inge Lehmann during the semester. The due dates are posted on the syllabus and any late assignments will suffer a full grade penalty.

As this class works with style perceptions and aesthetics, the exercises and projects are also going to be graded by the audience (class).

Individual Assignments:

1) Lifestyle Board 1 (5%):

Each student will be assigned a particular lifestyle and will have to create a lifestyle board using images magazines, internet, catalogs etc. The size of the board should not be bigger than 30 x 20 inches but we are expecting a board that is visually rich and interesting.

2) Lifestyle Board 2 (5%):

Each student will be assigned a particular lifestyle and will have to create a lifestyle board using images from magazines, internet, catalogs etc. The size of the board should be bigger than 30 x 20 inches but we are expecting a board that is visually rich and interesting.

3) Essay 1: Analysis of Concept store (10%)

Each student will develop an essay which should analyze five assigned concept stores by lifestyle. These stores will be assigned during the trip to King of Prussia. Students should use part of the time at the mall to visit the stores and take notes. The essay should identify who the target consumer is by lifestyle and include comments on the physical store, catalog, website as well as recommendations of how the concept could be improved. The essay should be no more than 4 pages double spaced.

Group Assignments:

During the semester there will be 3 group assignments. Groups should have five people and should be formed at the beginning of the semester. Once you have formed your groups it is important to register it on webcafe by 2/8.

4) Lifestyle Board 3 (10%): Each group should create 4 specific lifestyle boards using images from magazines and the internet etc. The size of each board should not be bigger than 30 x 20 inches but we are expecting boards that are visually rich and interesting.

5) Mid Term Project: Brand Book (15%)

Each group will have to create a brand book for a specific lifestyle. It should contain general lifestyle positioning that reflects the concept and aesthetics of the brand. In addition it should also have detailed product description, briefings for advertisements (body language, hair styles, make up, accessories, etc) as well as an appropriate font and choice of diction. The group will also present their brand book to the class so we advice on a power point brand book.

6) In Class Sensorial Assignment (15%)

After the lecture, in their groups students will have to select supplied samples to recreate specific lifestyle environments. The lifestyle environments will be sensorial involving smell, sight, touch, feeling/emotion, sound and taste. Each group will present to the rest of the class. A standard evaluation sheet will be handed to all students who will also grade the presentations and this will be factored into the final grade for this assignment.

7) Final Project: brand concept (25%)

In your groups you will create one specific lifestyle concept. Components for this should include but are not limited to:

- Definition of the of the brand concept
- Style and Aesthetic of the products
- Store Design (includes in store signage and windows)
- Website Design
- Catalog Design
- Packaging
- Advertising Campaign
- Global Consumer communication

Each group will present in front of the class and all members of the team should present. Presentations will take place on the 12th and 13th sessions but in order to be fair to everyone all slides must be handed in to me virtually by the 12th lecture. Once handed in slides can no longer be changed. Presentations will be 50 minutes long with 10 minutes for questions and class discussion after each one.

Class Participation (15%)

Class participation is an important component of the class. We encourage quality of perception and input of ideas over quantity of comments. In addition failure to contribute to discussions on webcafe when required to do so as well as unexcused absences will affect this portion of the grade.

OUTLINE OF CLASS SESSIONS

CLASS	DATE	TOPICS	DELIVERABLES
1	1/25	<p><u>Review Syllabus</u></p> <p><u>Discussion on “The Evolution of Desire”</u></p> <p><u>INTRODUCTION TO THE LIFESTYLE METHOD:</u></p> <ul style="list-style-type: none"> • History and Evolution of Style • Why we buy things that we don’t need? • The overspent consumer 	<p>For this class students should read:</p> <p>Reading 1 and 2 of: “The Evolution of Desire”</p>
2	2/1	<p><u>LIFESTYLE DEFINITION 1:</u></p> <p>Class Discussion for “No Logo”</p> <p><u>Lifestyle description:</u></p> <ol style="list-style-type: none"> 1. Traditional 2. Neo Traditional 3. Modern 4. Design 5. Techno 6. Minimalist 	<p>For this class students should read assigned readings from:</p> <p>“No Logo” by Naomi Klein</p>

		<p>Break - 10 min</p> <p><u>Exercises:</u></p> <p><u>Mistake Boards</u></p>	
3	2/8	<p><u>LIFESTYLE</u></p> <p><u>DEFINITION 2:</u></p> <p>Class Discussion on Deluxe</p> <p><u>Lifestyle description:</u></p> <p>7. Glamour</p> <p>8. Eclectic</p> <p>9. Trendy</p> <p>10. Romantic</p> <p>11. Artist</p> <p>Break - 10 min</p> <p><u>Exercises:</u></p> <p><u>Mistake Boards</u></p>	<p>For this class students should read assigned readings of “Deluxe – How Luxury lost its Luster” by Dana Thomas</p> <p>Individual Lifestyle Board 1 Due.</p>
4	2/15	<p><u>LIFESTYLE</u></p> <p><u>DEFINITION 3:</u></p> <p><u>Lifestyle description:</u></p> <p>12. Nomad</p> <p>13. Eco</p> <p>14. Spiritualist</p>	<p>Individual Lifestyle Board 2 Due.</p>

		<p>15. Intellectual 16. Mainstream</p> <p><u>Exercises:</u></p> <p><u>Mistake Boards</u></p>	
5	2/22	<p><u>This class will discuss how to communicate with each lifestyle effectively?</u></p> <p><u>Guest Speakers:</u> <u>Fran Philip, LLBEAN</u></p> <p><u>CASE STUDY</u></p> <ul style="list-style-type: none"> • The consistent evolution of LLBean as a Brand. 	<p>For this class students should read: Reading 1 and 2 of: “Luxury Fashion Branding”.</p> <p>And assigned readings from “The end of Marketing as we know it” by Sergio Zyman.</p>
6	3/1	<p><u>GROUP REVIEW OF BOARD 3:</u></p> <p>Groups will only come in for one hour period and will be working with Whitaker and another group in a more in-depth session.</p>	Group Lifestyle Board 3 Due.

		Assignment: Each group will be given a life style to further develop a brand book.	
	3/8	<u>Spring Break</u> <u>NO CLASS</u>	
7	3/15	<u>INDIVIDUAL PRESENTATION OF BRAND BOOKS:</u> Each Group will have 20 minutes to present their brand books to the class followed by 5 minutes of Q&A 10 min Break after 3rd group	Mid Term Project Brand Book Due.
8	3/22	<u>Lifestyle vs Price Point:</u> Discussion of Trading Up: <u>Guest Speaker:</u> <u>Carlos Gomes</u> (CEO TMG) Presentation on price points vs. Lifestyle “Massification of Fashion and How to	Students should read “Trading Up” by Michael Silverstein

		achieve Differentiation”	
--	--	-------------------------------------	--

	3/29	<p><u>Importance of Senses for creation of lifestyle concept stores and brands.</u></p> <p><u>This class will be a series of exercises on senses by lifestyle:</u> Smell, Sight, Touch, Emotion, Sound, Taste.</p>	Read “Emotional Branding” by Marc Gobe.
--	-------------	--	--

--	--	--	--

10	4/5	<p><u>RETAIL ANALYSIS BY LIFESTYLE</u></p> <p>Field Trip – Retail Study Tour of King of Prussia.</p> <p>1) Fatima, Inge and Monica will work each one hour with a group of 10 students. 4 stores per group.</p> <p>2) Students will go to five assigned retail concepts on their own and take notes on product, store</p>	
-----------	------------	---	--

		<p>design and merchandising. Students should identify who the target consumer is based on lifestyle and gather information for the essay.</p>	
11	4/12	<p><u>BEST OF RETAILING:</u></p> <p><i>GUEST SPEAKER: Terry Agins</i> (Author of The End of Fashion and journalist of WSJ) & <i>Maarten de Groot</i> (President of the International Association of Department Stores)</p> <p>“How Retailing has evolved and the role of Design”.</p> <p>How to apply all learned concepts to a retail environment. Whitaker will discuss best global innovative Retail and Brand Concepts.</p>	<p>Essay 1 Due Read: Assigned readings of “The end of Fashion” by Terry Agins.</p>

12	4/19	<p><u>Presentation of Group Projects</u> Each group will present their final project individually in front of the class for 50 min., We encourage active class participation with individual comments.</p>	<p><u>FINAL GROUP PROJECT DUE: BRAND CONCEPT</u> Everyone should submit their presentations on webcafe today before class.</p>
----	------	---	---

13	4/26	<p><u>Presentation of Group Projects</u> Each group will present their final project individually in front of the class We encourage active class participation with individual comments.</p> <p>Final Discussion and Wrap-up</p>	
----	------	---	--

