

# IT'S THE 21<sup>st</sup> CENTURY

## DO YOU KNOW WHERE YOUR INDUSTRY IS?



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# **“THE THIRD WAVE”**

**RETAILS' MOMENT OF REDEFINITION**



**IN THE CONSUMER CENTURY**



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# FOUR “MEGA”-TRENDS

**Globalization**



**Technology**



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# FOUR “MEGA”-TRENDS

**Globalization**



**Technology**

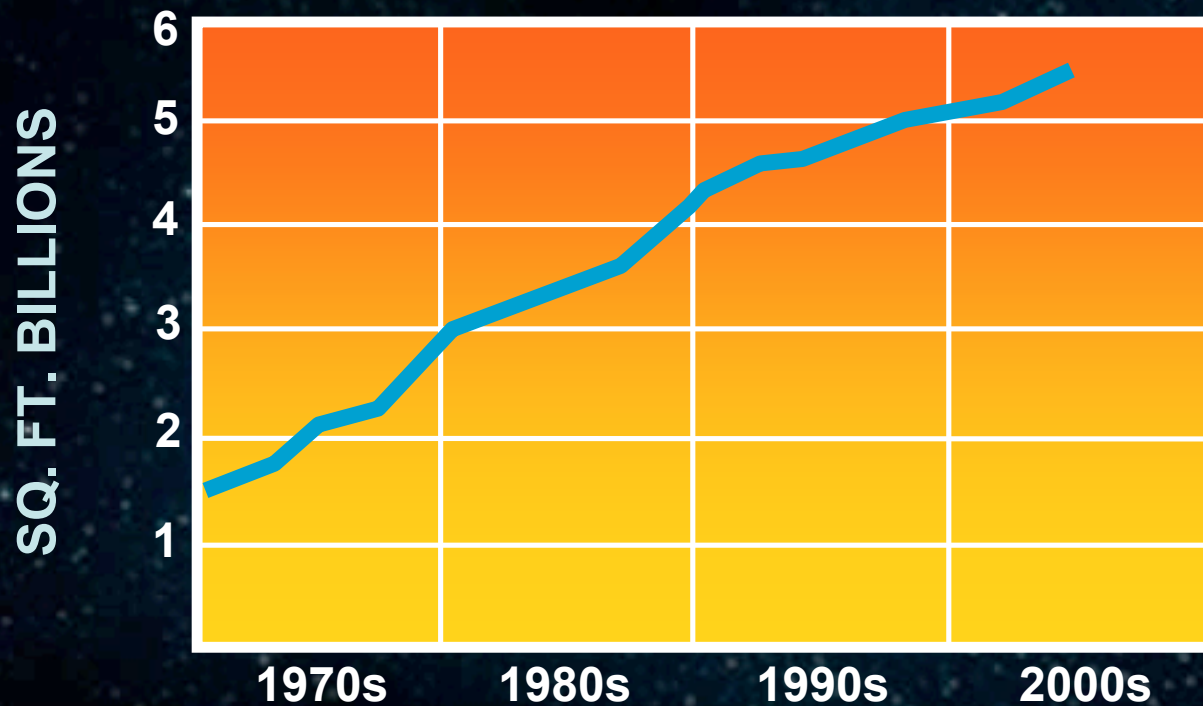
**The Great Paradox**



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## DEVASTATING RETAIL EXPANSION



RETAIL SPACE 1970 – 2002



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# SHARE WARS



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## DEFLATING PRICES



— TOTAL  
— APPAREL & ACCESSORIES



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# FOUR “MEGA”-TRENDS

**Globalization**

**Competitive  
Congestion  
Forever**

**Technology**

**The Great Paradox**



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**IN THE LAND OF EXCESS...  
CONSUMER IS KING**



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# POWER OF TOTAL ACCESSIBILITY

- MORE AND CHEAPER ACCESS  
THROUGH GLOBALIZATION, INCREASED PRODUCTIVITY AND  
MARKET SATURATION
- QUICKER AND EASIER ACCESS  
THROUGH RAPID, MORE RESPONSIVE AND MULTIPLE DISTRIBUTION  
CHANNELS, INCLUDING THE INTERNET AND MOBILE ELECTRONICS
- MORE INTELLIGENT ACCESS  
THROUGH INCREASED INFORMATION, COMMUNICATIONS,  
INTERNET AND MOBILE ELECTRONICS

# POWER OF TOTAL CONTROL



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# EXPERIENTIAL, BY ME, FOR ME NEW AND NOW WORLD OF THE 21ST CENTURY

FROM

TO

STUFF

EXPERIENCE

CONFORMITY

CUSTOMIZATION

PLUTOCRACY

DEMOCRACY

NEW

NEW AND NOW



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# FOUR “MEGA”-TRENDS

**Globalization**

**Competitive  
Congestion  
Forever**

**Technology**

**Consumer  
Power  
Forever**

**The Great Paradox**



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# SUPPLIERS

**ACCESS AND CONTROL CHALLENGED**

**“COMPETITIVE CONGESTION”**



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# THE POWER SHIFT AND RETAILING'S "THREE WAVES"

Producer Power



DEMAND  
SUPPLY

MORE SUPPLY

1900

1950

2000

**Production Driven**  
Chase Demand  
Product Brands  
**Fragmented Markets**  
**Fragmented Marketing**

**WAVE I**

**Marketing Driven**  
Create Demand  
Lifestyle Brands  
**Mass Markets**  
**Mass Marketing**

**WAVE II**

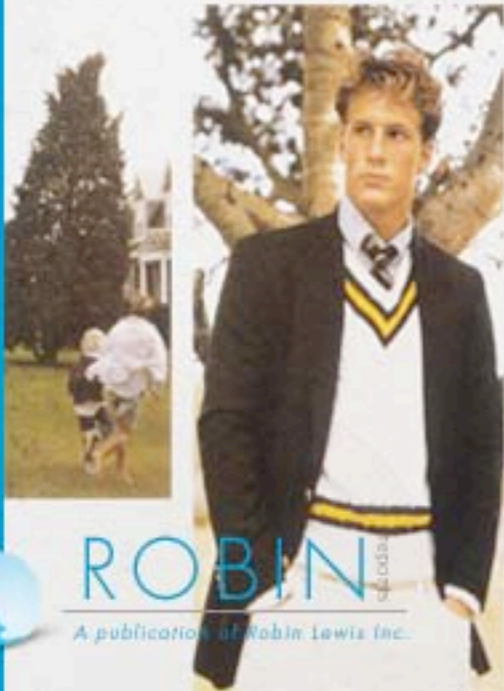
**WAVE III**



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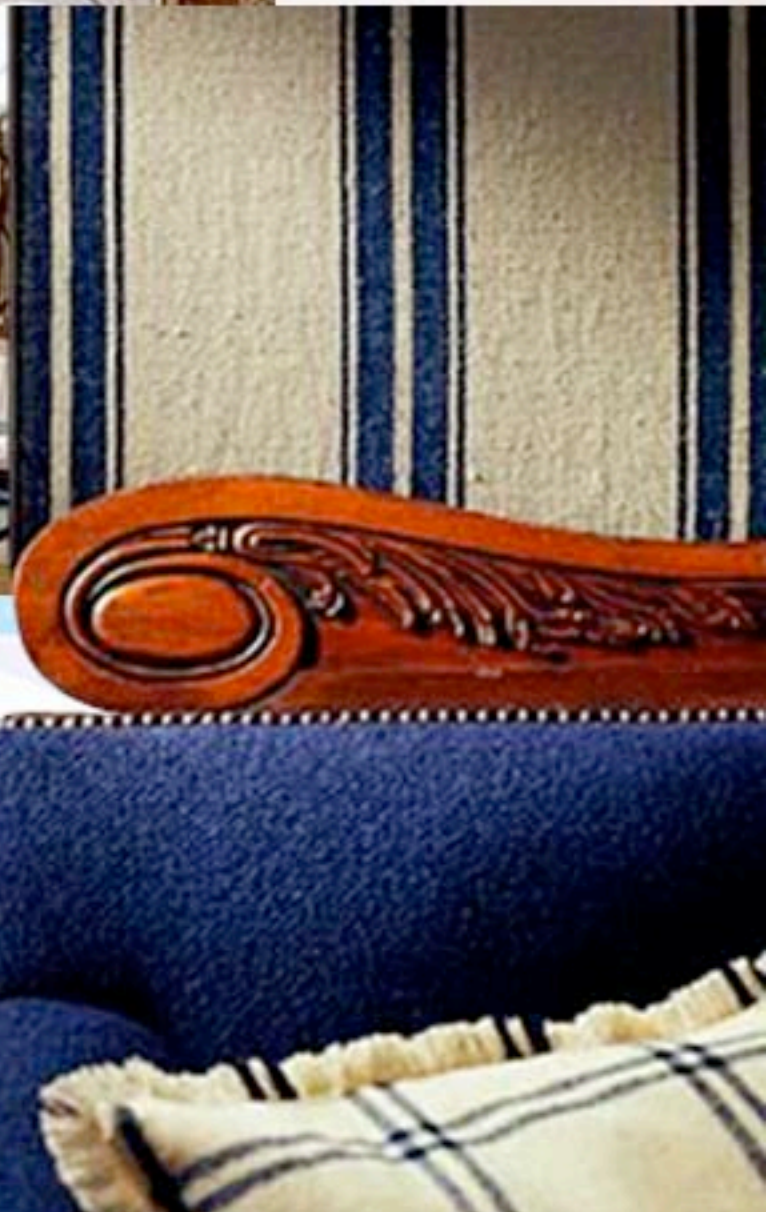




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# THE POWER SHIFT AND RETAILING'S "THREE WAVES"

Producer Power



DEMAND  
SUPPLY

MORE SUPPLY

TOO MUCH

Consumer Power



1900

**Production Driven**  
Chase Demand  
Single Product Brands  
**Fragmented Markets**  
**Fragmented Marketing**

**WAVE I**

1950

**Marketing Driven**  
Create Demand  
Lifestyle Brands  
**Mass Markets**  
**Mass Marketing**

**WAVE II**

2000 AND BEYOND

**Distribution Driven**  
Deliver to Demand  
Lifestyle/Experiential Brands  
**Finite Market Segments**  
**Micro-Marketing**

**WAVE III**



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Producer Power



Consumer Power



DEMAND  
SUPPLY

MORE SUPPLY

TOO MUCH

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1950

2000 AND BEYOND

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**WAVE I**

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Create Demand  
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**Mass Markets**  
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**WAVE II**

**Distribution Driven**  
Deliver to Demand  
Lifestyle/Experiential Brands  
**Finite Market Segments**  
**Micro- Marketing**

**WAVE III**

Stuff	To	Experience
Conformity	To	Customization
Plutocracy	To	Democracy
New	To	New And Now



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# SEVEN EMERGING BUSINESS MODELS

- 1) RETAILERS INTEGRATING “BACKWARD”
- 2) WHOLESALERS INTEGRATING “FORWARD”
- 3) CONSOLIDATION AND SEGMENTATION
  - Segmentation for marketing leverage
  - Consolidation for supply chain leverage
- 4) “MINI”-FORMATS FOR MANY NEIGHBORHOODS, THE INTERNET, AND MULTI-CHANNEL DIRECT
- 5) NICHE BRANDING BY SPECIALTY CHAIN BRANDS AND THE RISE OF INDEPENDENT BOUTIQUES AS THE NEW “MOM’S AND POP’S”
- 6) ACCELERATED BRAND PROLIFERATION AND NEW LINE/STYLE CYCLES (CONTINUOUS/RAPID INNOVATION AND DIFFERENTIATION)
- 7) GOING GLOBAL



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# THE FUTURE IS NOW

## RETAILS' MOMENT OF REDEFINITION



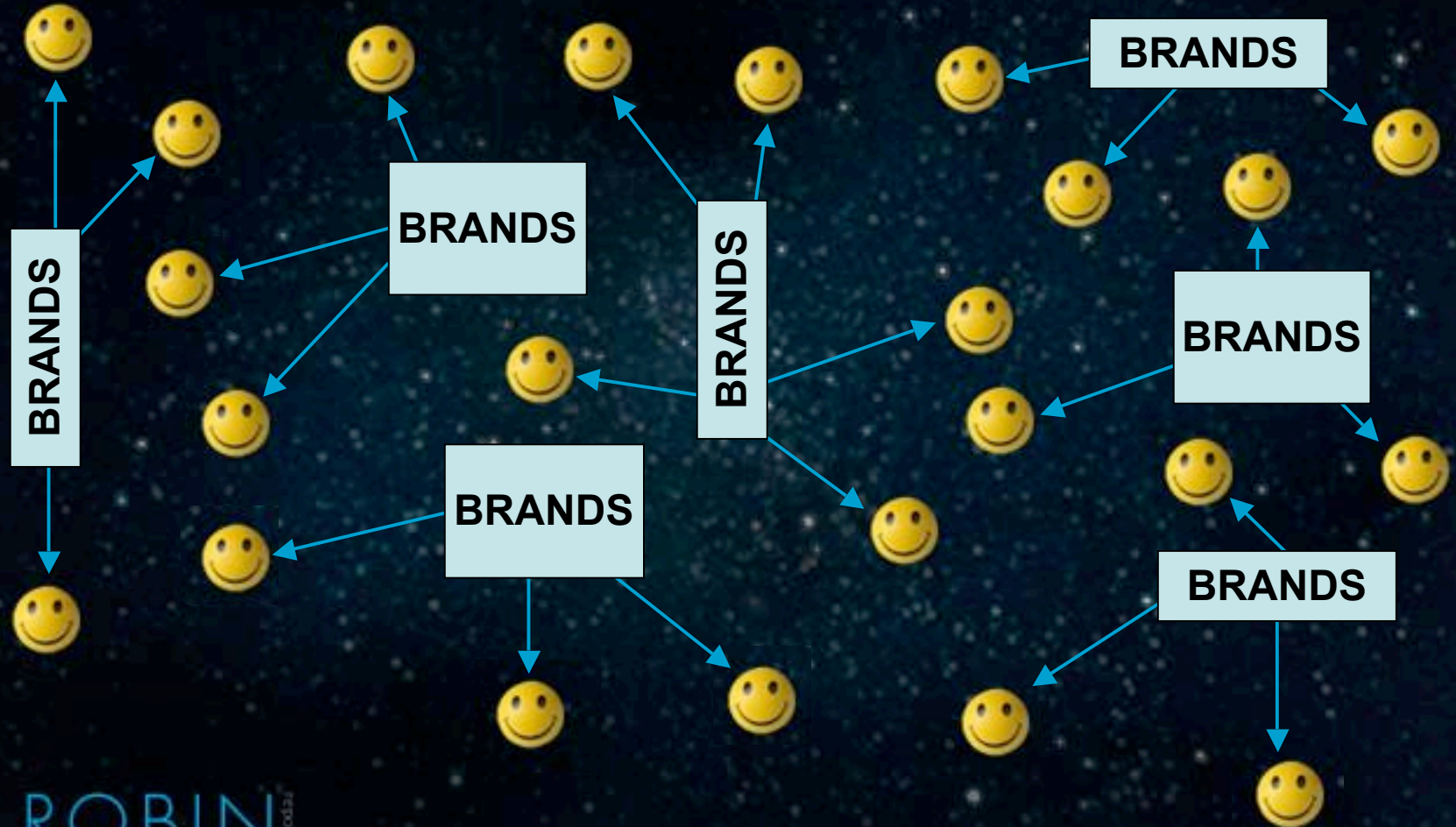
WHAT WILL YOU CALL YOURSELF? WHAT WILL YOU BE?

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# BRAND MANAGERS



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**“BRING MY BRAND TO ME”**