LUXURY AND TECHNOLOGY

Toward the Boutique of the Future

2023 Report

Second edition

COMITÉ
COLBERT

Depuis 1954

BAIN & COMPANY ◉

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TABLE OF
CONTENTS

Summary

▶ **The accelerated adoption of new technologies in the luxury sector has continued**, with increasingly sophisticated use cases for the most mature technologies (notably radio frequency identification and artificial intelligence), and a steady flow of experiments to enhance customer engagement (augmented or virtual reality, NFTs). The metaverse trend has given way to generative artificial intelligence, with highly promising use cases for the industry. Moreover, the connection between new technologies and sustainable development is now much more evident for luxury goods makers (*Maisons*).

▶ Post-Covid, **the boutique has reclaimed its status as the cornerstone of a *Maison*'s identity**. However, its **role has evolved** beyond merely hosting the purchase to providing a human and emotional experience and an immersion in the brand's universe (for 43% of luxury customers, discovering the product and the brand is the primary reason for their boutique visit; for 34%, it's the feeling of VIP treatment). That means the boutique must be fully integrated into an omnichannel customer journey.

▶ Though often concealed, **technology is ubiquitous in boutiques, powering three distinct objectives**: magnifying the relationship between customers and sales associates; enriching the discovery of collections and the immersion in the brand's universe; and, ultimately, streamlining the customer journey and operations.

▶ 75% of luxury customers **display a strong appetite for the technological use cases tested in our study**, assuming the demanding standards of the sector are met: i.e., no self-service and only the highest standards of execution.

▶ The first field of technology application in boutique is about **enriching the relationship between the customer and the sales associate**. For 61% of luxury shoppers, this relationship influences their willingness to promote a brand; deepening that bond is the main priority for all the surveyed *Maisons*. Clienteling tools foster intimacy between the customer and the sales associate, enabling more accurate and personalized recommendations based on customer, product, and logistics data.

▶ **Enhancing the flow of the in-store journey is the second field in which new technologies can be applied**, helping to ease existing bottlenecks (58% of customers mention waiting times as a source of frustration). For instance, tests are performed to enhance the payment stage or the rapid tracking of products in the boutique.

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▶ Beyond these applications, ***Maisons* are testing use cases aimed at enriching their storytelling**: through augmented reality, virtual reality, or connected mirrors to breathe extra life into collections and immerse customers in the brand's universe and heritage. These experiments are primarily conducted by the *Maisons* affiliated with luxury groups.

▶ Lastly, the combination of luxury market growth and sustainability commitments has made it even more pressing to **adopt new technologies and use cases in operations**, in areas such as boutique-specific assortment selection, improved stock allocation, inventory automation, and more. New technologies (e.g., artificial intelligence and RFID chips) can optimize flows and operations, ultimately maximizing the customer-facing time.

▶ While new technologies in luxury boutiques have taken significant strides following the Covid pandemic, they still have ample room for development. **Scaling up their deployment** requires a deep transformation of the *Maisons*, extending far beyond the boutique walls. This will involve a cultural revolution (team buy-in, work platforms), a redesign of technological architecture, as well as an evolution of the boutique in terms of its layout and organization.

The customer journey in tomorrow's boutique

Consider a customer, let's call her Pamela. She's Franco-American, works, travels. You all know her: she's a classic luxury goods shopper. Sometimes she has time, sometimes she doesn't. She organizes her wish list, schedules an appointment, and checks the availability of that bag she's been eyeing (which a chatbot has accurately recommended to her, fueled by her browsing history). She might also take a tour of the boutique in advance, using virtual reality or—even better—augmented reality.

Arriving at her destination, she stops in front of the adjacent boutique. Drawn to the interactive displays, she scans a QR code and browses the product details on her phone. She could have joined the virtual line, but it's already time for her appointment. She enters. The sales associate—seeing her for the first time—already knows her very well. The sales associate has been able to review her purchase history and the web pages that caught her attention. They know whether to call her Pamela or Mrs. Ferrand. "*Oh, please call me Pam,*" she interjects, immediately feeling at ease.

She discovers some products she wasn't familiar with thanks to the sales associate's app and shares them on her Instagram account. She experiences the latest fashion show as if she had been there. Could she have talked to a robot that might have guided her in this vast flagship boutique? Who knows ... She shows on her phone the details of a bag she had taken a picture of on the streets. The image recognition immediately identifies it.

The products she had selected before coming await her in the fitting room, as well as the products presented by the sales associate (all are in stock because artificial intelligence has brought an unparalleled accuracy to inventory management, aiding restocking through improved demand forecasting, for instance). If she had been in a rush, she could have trusted the hologram or the virtual try-on in augmented reality. But today is all about relaxing so she takes her time, exploring other items, too. Those pumps do indeed go very well with that suit, as suggested by the boutique's interactive mirror. The tawny leather? No. The beige leather? No. The gray leather? Yes, perfect. In the meantime, the red sweater she spotted when entering the boutique has arrived in black from another store location. A perfume? Why not. She likes cypress, florals, not too sweet, but a bit of sweetness nonetheless—as the neuronal assessment confirms.

Using her phone, she settles her payment directly with the sales associate in the small private lounge where she finishes her very real glass of champagne while her bags are being prepared. She could have also received a payment link, calculated from automatic scans of the radio frequency identification (RFID) chips of her purchases, or been debited directly by passing through the gate at the exit. Euros, dollars, bitcoins? The choice is hers. Artificial intelligence (AI) has allowed prices to be determined based on demand, competition, or stock levels, and to adjust them in real time.

She has already received all the warranty certificates on her account: non-fungible tokens (NFTs) that she can use when she sorts through her wardrobe. She can directly forward the care recommendations to her dry cleaner. She will even be notified when it's time to nourish the leather of her bag or when the new variation of the perfume she chose comes out. She has the small clutch bag she found for her mother directly delivered to her, and she sends her the video gift card that she recorded on the spot: "*Remember? Grandma wore it in blue at my wedding: two generations later, still a customer! Everything changes, yet nothing changes.*"

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Introduction

The lockdowns and restrictions due to the Covid crisis temporarily kept customers away from boutiques. Their return to physical stores comes with an increased need for interaction and connections. The boutique is now more than ever a destination for pleasure, discovery, and enchantment.

The boutique? No, the boutiques. As Angeline Durand Sastre, Head of Fashion Europe at CHANEL Mode, points out: *"Each boutique is unique: one boutique, one story."* Indeed, boutiques come in various and complementary formats. They must adapt to the locations they are in (residential, tourist, travel retail, pop-up, exclusive customer lounge…) as visitor expectations differ greatly. In high-traffic areas, speed is essential, and technology primarily aims to eliminate inconveniences. In tourist zones and flagship boutiques, it enhances the experience and exploration. While this segmentation of retail formats broadens the brand's territory, channels must communicate seamlessly, which only technology can enable.

Because boutique visits are increasingly part of an omnichannel journey: 66% of luxury customers—spanning all generations and geographies—say they consult the *Maison*'s website before making a purchase. A continuous dialogue is established beyond its physical walls both before and after the visit to attract the customer, trigger the purchase, and nurture the relationship from one visit to another. Clienteling applications orchestrate the various touchpoints: boutique, website, aftersales, ongoing interaction with the sales associate … Centralizing and analyzing all this data allows each customer to be treated as a unique individual and accompanied throughout their journey, whether in-store or not. That data can be used to inspire the customer at crucial moments through personalized messages. Likewise, scanning customer wish lists and their visit/purchase history can help sales associates serve and advise them better.

New technologies allow for an enriched form of storytelling. They enable brands to surprise the customer and strengthen emotional connection: 75% of customers are ready to embrace their use. The technological tools available today—whether they directly interact with customers or run in the background of the boutique—outline the contours of tomorrow's customer relationship: more practical, more experiential, more personalized, and, of course, more emotional. That relationship will become more engaged as well, in line with increasing customer expectations toward a brand's values and purpose.

General considerations

We conducted exclusive qualitative and quantitative surveys of luxury customers in various categories (from ultra-high-net-worth individuals to aspirational customers), covering three core markets (France, the USA, and China). These surveys enable us to better understand their expectations regarding the boutique's role, and their appetite for a range of technology-supported use cases.

Reasons for visiting the boutique

The boutique (as a physical space) remains the epicenter of the relationship between the customer and the brand. For *Maisons*, it's an opportunity to express their DNA, highlight their heritage, and showcase their craftsmanship: to create a consistent environment that they have complete control over. As Matthieu Rinville, Founder of Orbis Advising explains: "*The boutique is the platform for the relationship between the brand and the customer. It allows the Maison to personally know its customer, build a relationship of trust, and thus foster loyalty.*" For customers, it's primarily an opportunity to discover the products and collections of the *Maison*, while enjoying a personalized and privileged treatment, all within a smoother experience.

Close to 45% of luxury customers mention that exploring products and collections is the primary reason for visiting a boutique. Nothing compares to the pleasure they feel when they browse, touch, and try on unique pieces, thus discovering their true sophistication. As they stroll through the boutique, they enter a unique universe and give themselves the opportunity to deepen their understanding of the collections as well as the values and history of the *Maison*.

Yet for about a third of customers, the primary reason for visiting a boutique is the special treatment provided by the sales associate. As experts in their field, they offer tailored service, advice, and guidance throughout the customer's experience. Customers feel privileged and valued when they are taken care of with professionalism, thus reinforcing the exclusive nature of their experience.

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Figure 1: Why luxury customers choose to shop in a physical boutique
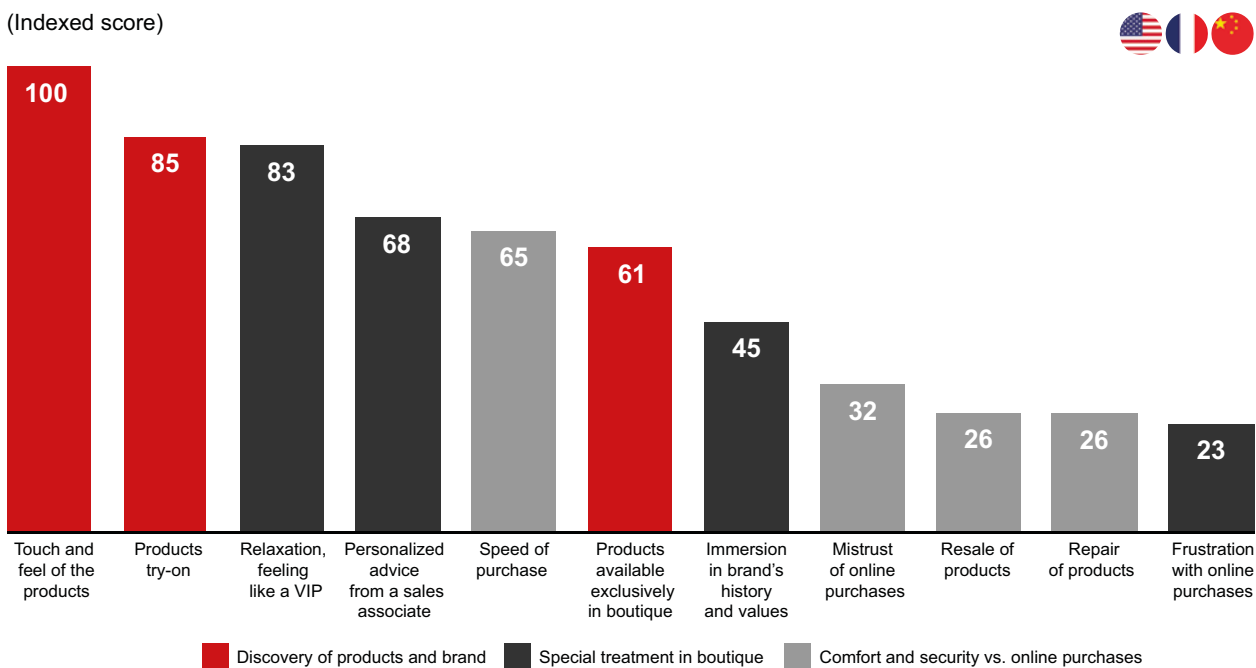
(Indexed score)

Source: Comité Colbert and Bain & Company consumer survey (June 2023)

Share of customers citing as first criterion

Source: Comité Colbert and Bain & Company consumer survey (June 2023)

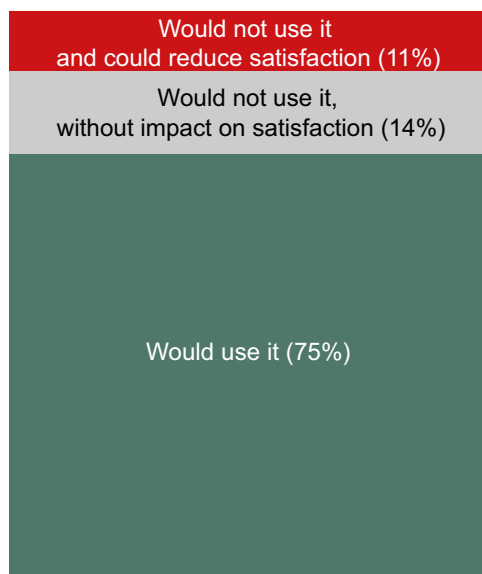LUXURY AND TECHNOLOGY. Toward the Boutique of the Future. 2023 Report

Strong customer interest in technology-supported use cases

Regardless of whether they are regular or occasional visitors, customers overwhelmingly endorse the utilization of new technologies in luxury boutiques today. An average of 75% of them express enthusiasm for the new use cases (*see Figure 2*).

All generations display robust interest. Yet it is in France where customers show more measured enthusiasm, with 66% of respondents being "promoters" of the tested use cases, nearly 20 points lower than in China, where 84% are promoters. As we highlighted in last year's report, China often serves as the testing ground for luxury's technological advancements, both in-store and online (*see Figure 3*).

Figure 2: Luxury customers are mostly keen to adopt new technology overall
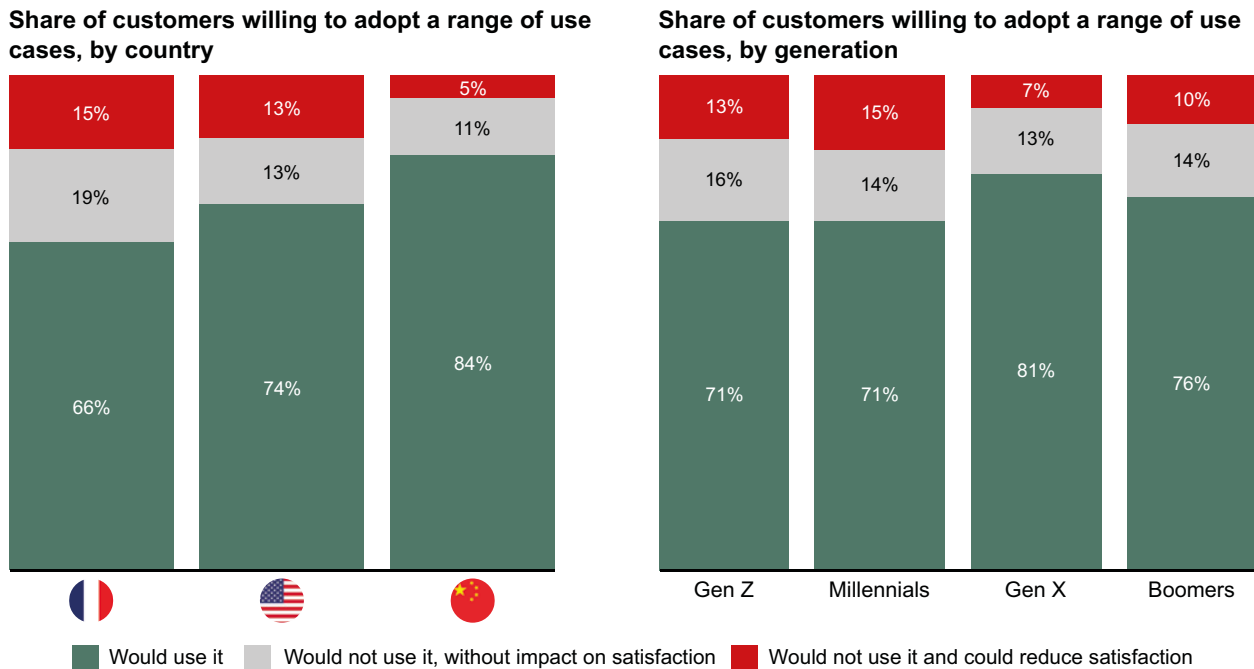
Share of customers willing to adopt a range of use cases

Would not use it
and could reduce satisfaction (11%)

Would not use it,
without impact on satisfaction (14%)

Would use it (75%)

Examples of tested use cases
(11 use cases tested in total)

- Prepare a **wis hlist online**
- Book an **appointment online**
- Access **product information** via a digital tag
- **Try on** items **virtually**
- Discover **brand's history** through digital content
- Be assisted by a **robot**

Source: Comité Colbert and Bain & Company consumer survey (June 2023)

Figure 3: Willingness to try new technology spans regions and age groups

Share of customers willing to adopt a range of use cases, by country

Share of customers willing to adopt a range of use cases, by generation

Would use it　　Would not use it, without impact on satisfaction　　Would not use it and could reduce satisfaction
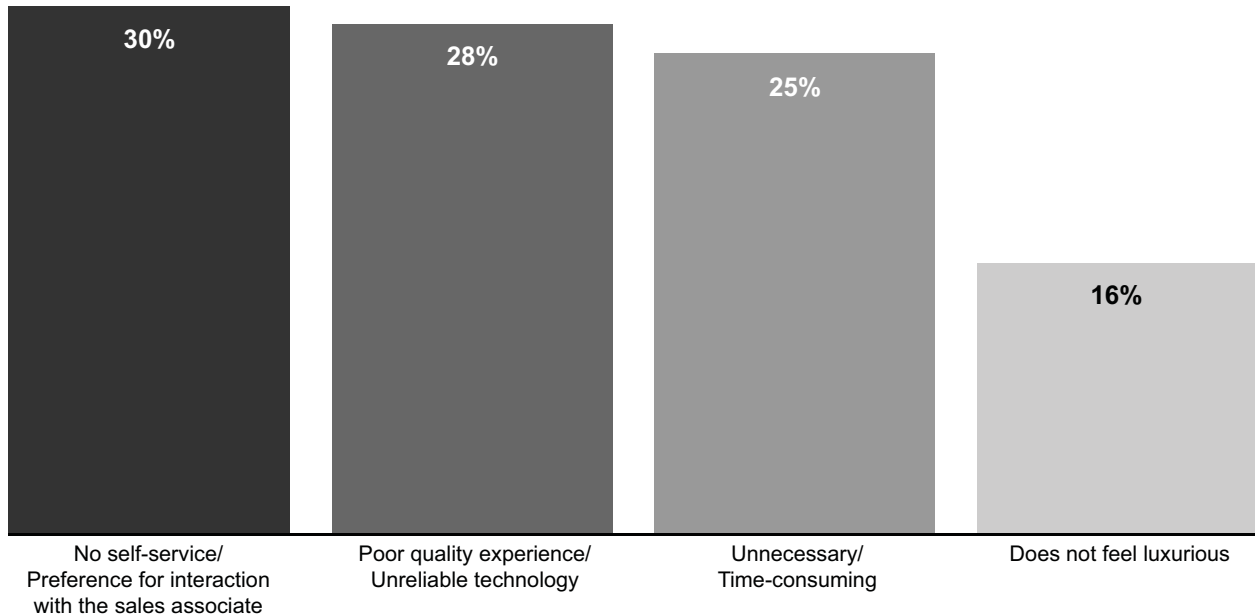
Source: Comité Colbert and Bain & Company consumer survey (June 2023)

The disparities in levels of interest between the tested use cases are minor, except for the most futuristic technologies, such as robotic assistance, where opinions differ. Overall, 19% of respondents show hostility to robotic assistance vs. an average detraction rate of 11% for all use cases. However, Chinese customers exhibit a distinct interest. For example, a 23-year-old customer stated: *"Yes, it would be nice to have some company through a robot. I was quite impressed the first time I saw one. However, I might eventually get tired of it if I visited the same store multiple times."* For others, the presence of a robot could degrade the experience, as explained by a French customer: *"A robot? It's inhuman, cold, and essentially not very aesthetically pleasing. I'm in a luxury boutique, not a pharmacy."*

The presumed antagonism between luxury and technology is gradually fading: Only 16% of customers believe that technology isn't suitable for the sector. The barriers seem to be crumbling but on the condition that the use cases are deployed and presented to the customer in a way that matches their elevated expectations. That means no *"self-service,"* emphasized Cédric Aumonier, Business Partner at jeweler Lorenz Bäumer: *"The digital experience becomes acceptable when the customer is accompanied, when the sales associate marvels with them."* All with impeccable execution quality.

Figure 4: Customers are particularly resistant to self-service

Top reasons for not wanting to use new technology in a boutique, by share of customers citing

30%	28%	25%	16%
No self-service/ Preference for interaction with the sales associate	Poor quality experience/ Unreliable technology	Unnecessary/ Time-consuming	Does not feel luxurious

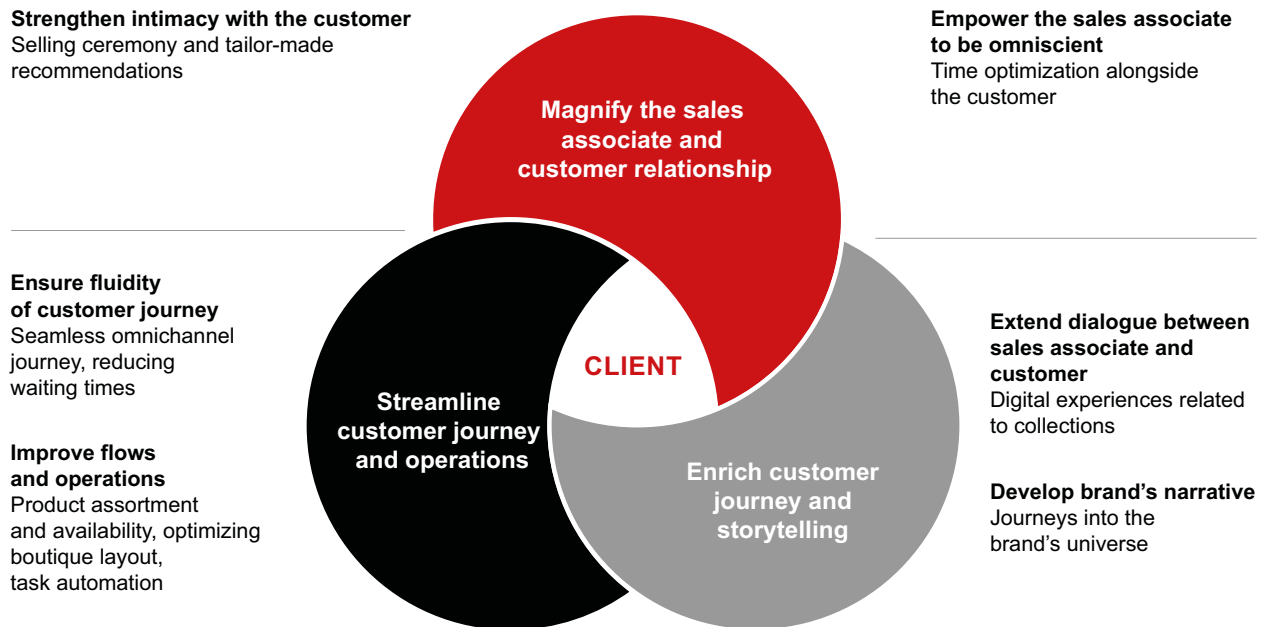Source: Comité Colbert and Bain & Company consumer survey (June 2023)

The role of new technologies in boutiques

Luxury *Maisons* are unanimous: they don't incorporate technology to be fashionable, but with specific customer-centric objectives.

The deployment of new technologies in luxury boutiques serves three primary objectives (*see Figure 5*).

First and foremost, it magnifies the relationship between customer and sales associate, deepening their intimacy. A personalized dialogue and heightened selling ceremony—enabled by the integration of platforms and intelligent data analytics—ensure a tailor-made experience. Product recommendations generated by AI complement the sales associate's intuition and give a laser focus to sales conversations. Technology also boosts the sales associate's level of knowledge, especially of inventory. They get a better sense of where products are in the boutique, as well as the real-time availability in other store locations and warehouses.

Figure 5: Objectives served by technology in the boutique

Strengthen intimacy with the customer
Selling ceremony and tailor-made recommendations

Empower the sales associate to be omniscient
Time optimization alongside the customer

Magnify the sales associate and customer relationship

Ensure fluidity of customer journey
Seamless omnichannel journey, reducing waiting times

Improve flows and operations
Product assortment and availability, optimizing boutique layout, task automation

CLIENT

Streamline customer journey and operations

Enrich customer journey and storytelling

Extend dialogue between sales associate and customer
Digital experiences related to collections

Develop brand's narrative
Journeys into the brand's universe

Source: Comité Colbert and Bain & Company consumer survey (June 2023)

Technology also aims to enrich the customer journey and brand discovery. The goal is to offer new digital experiences, whether in-store or beyond its walls, to captivate and immerse customers in the *Maison*'s universe and collections. This is achieved through immersive experiences, such as virtual try-ons or previews of product customization.

Lastly, technology is deployed to streamline the customer journey—eliminating friction points— and the operations of the *Maisons*. This optimization occurs through improvements to in-store flows, assortment, visual merchandising, and product availability, as well as through the automation of low-value-added tasks.

Value hierarchy of technology objectives in boutiques

Over the past five years, *Maisons* have made significant investments in the development of technologies that primarily align with the first of the listed objectives: placing an absolute priority on fostering stronger intimacy with the customer through his interaction with the sales associate. The necessity of these investments is confirmed by the fact that the relationship with the sales associate is at the core of the emotional experience in boutique for 61% of luxury customers. It's what makes the moment remarkable.

The need to streamline the customer journey and operations through technology has emerged as the second major focus for *Maisons*, with a growing interest in experimental solutions that enable a seamless customer experience. Indeed, 58% of customers mention waiting as a source of frustration, while 47% cite product unavailability (rising to 60% for Generation Z, for whom it's the primary cause of disappointment in a store). Online appointment scheduling, real-time product location within the store, and mobile payment are among the technological use cases being deployed or explored by *Maisons* to minimize customer wait times and maximize the time spent with their sales associate.

Furthermore, technological tools are being deployed widely within *Maisons* to optimize production volumes, stock, and the flow of goods. Predictive AI, for instance, makes it possible to anticipate needs better, taking account of variables such as geographical area, type of boutique, customer footfall, and more. This predictive capability refines itself through real-time updates linked to sales, releases of new collections, advertising campaigns, and product interest on social media or e-commerce sites. This approach helps ensure compliance with new regulations (such as the French AGEC law on waste reduction and the circular economy). It also meets the societal demand for sustainable commitments, which has placed eco-responsibility at the core of brand strategies.

Enriching the customer journey and storytelling through new digital experiences is emerging as a new battleground. The challenge is to surprise the customer, create memorable moments, and enhance the brand's desirability. Exploring these use cases takes different directions among *Maisons*. It is primarily determined by the size of the companies and their investment capacity, as return on investment is not always evident on a project-by-project basis. The second differentiating factor is linked to each *Maison*'s adoption strategy—or what one might call their technological philosophy, which is determined by their history, DNA, approach to luxury, and more.

#1 Magnify the sales associate and customer relationship

#2 Streamline customer journey and operations

#3 Enrich customer journey and storytelling

Technology to improve interactions between customers and sales associates

The expectations of luxury customers

Luxury customers are not exclusive to the sector: 94% of them can also be found at Apple, Zara, Uniqlo, NIKE, or Reformation—brands from the premium or mass-market industry that have embraced new technologies, sometimes making them a primary selling point in physical stores. *"We focus on offering an advanced, tech-enabled shopping experience, but always through the lens of enhancing the customer experience in our stores,"* states Hali Borenstein, Reformation Chief Executive Officer. However, customer expectations are highly sector-specific. While they may appreciate immersive screens and holograms or enjoy interacting independently with digital tools at NIKE or Reformation, their expectations shift when they step into a luxury boutique, where human interactions remain an essential prerequisite. For technology to enhance customer relationships, it must assist the sales associate in their role and traditional objectives, and make them more knowledgeable, always with discretion and flawless execution.
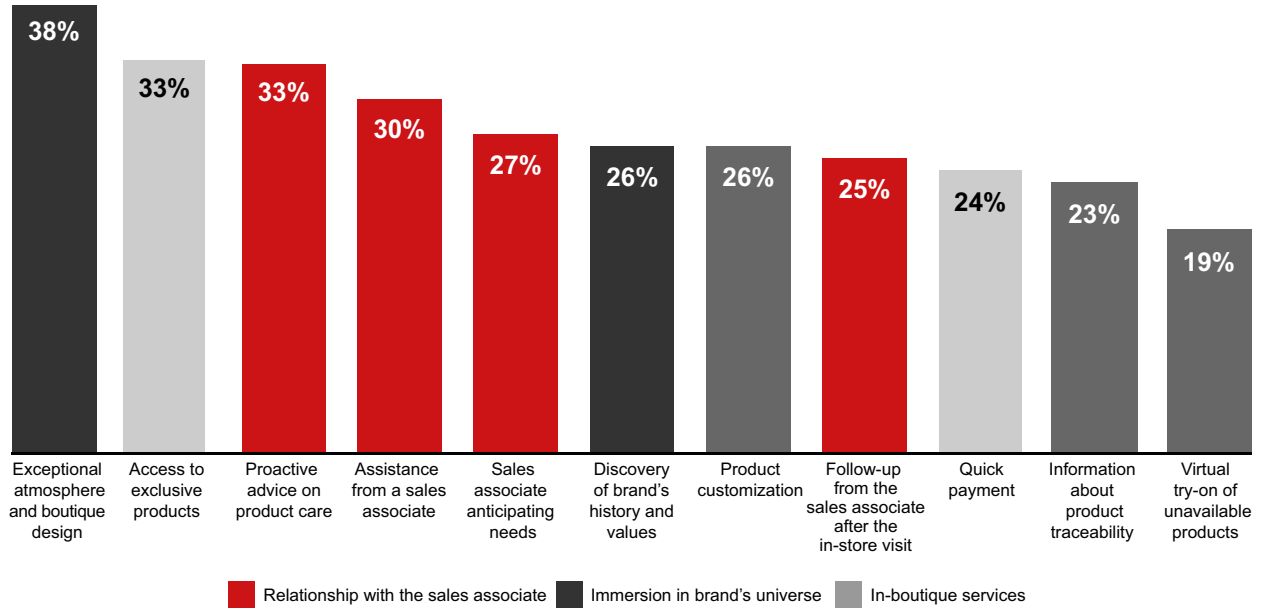
The Deus ex machina sales associate

For 61% of customers, the relationship with the sales associate is the key factor in creating a remarkable experience whether in-store or beyond (*see Figure 6*). Therefore, technology is not meant to replace the sales associate but to accompany them in enhancing human relationships without ever encroaching on their role. A disappointing relationship with the sales associate is one of the primary causes of frustration for 46% of customers.

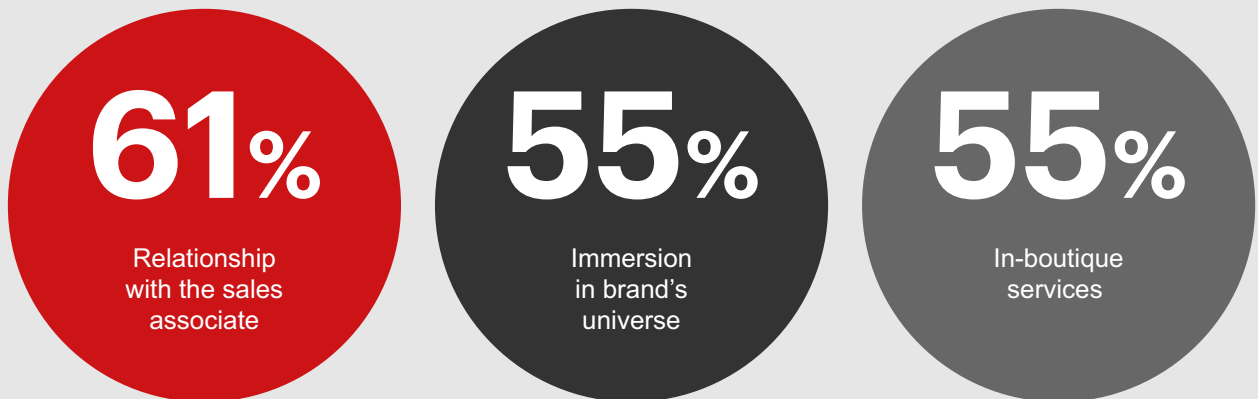LUXURY AND TECHNOLOGY. Toward the Boutique of the Future. 2023 Report

Figure 6: The most remarkable moments for customers when shopping in a luxury boutique

Share of customers citing as remarkable

38%	33%	33%	30%	27%	26%	26%	25%	24%	23%	19%
Exceptional atmosphere and boutique design	Access to exclusive products	Proactive advice on product care	Assistance from a sales associate	Sales associate anticipating needs	Discovery of brand's history and values	Product customization	Follow-up from the sales associate after the in-store visit	Quick payment	Information about product traceability	Virtual try-on of unavailable products

🟥 Relationship with the sales associate ⬛ Immersion in brand's universe 🔲 In-boutique services

Source: Comité Colbert and Bain & Company consumer survey (June 2023)

Share of customers citing as top-four criterion

61% Relationship with the sales associate

55% Immersion in brand's universe

55% In-boutique services

Source: Comité Colbert and Bain & Company consumer survey (June 2023)

The sales associate's tech-powered omniscience strengthens the relationship. It, first and foremost, enhances the relationship by personalizing it, using all the data collected throughout the customer journey (preferences, purchase history, returns, interactions with the *Maison*, even events outside the boutique). It also broadens and makes the relationship more relevant. The sales associate's intelligence—intuition, knowledge, interpersonal instinct—is enriched with additional data (such as behavioral insights) provided by artificial intelligence, to offer more fitting recommendations. It becomes more precise and tailored due to a better view of stock availability. Lastly, technology makes the sales associate more available, maximizing their time spent with the customer. *"In fact, our clienteling platform has allowed our sales associates to spend more time with our customers especially by offering stock visibility within the application, eliminating the need to physically access the storeroom,"* notes Isabelle Durand Richard, Global Chief Client Officer, Performance and Omnichannel at Christian Louboutin. *"Before its development, a customer received assistance less than 40% of the time spent in boutique."* The continuous enhancement of features goes hand-in-hand with the enrichment of the customer relationship, foreshadowing numerous other benefits and increasingly accurate recommendations.

All *Maisons* today rely, for all these reasons, on clienteling applications designed to support the sales associates. The spectrum of functionalities varies among companies, their DNA, and their philosophy. Kering has developed in collaboration with Apple an app for its in-store sales associates, enabling them to provide more personalized and efficient service to their customers. Initially designed to prepare appointments, monitor real-time stock levels, and provide style recommendations, the app—regularly enhanced based on user feedback—now offers new features, particularly to facilitate in-store replenishment.

"The purpose of luxury is to create emotions and exceptional experiences in-store. The digital strategy that has concentrated a significant portion of our investments in recent years is to build an even stronger and personalized relationship between the customer and their sales associate."

Grégory Boutté, Chief Client and Digital Officer at Kering Group

The relationship between customer and sales associate is also a priority for independent *Maisons*. For example, at Longchamp, the app developed in partnership with ChapsVision offers a 360-degree view of the customer based on data captured throughout their journey in-store, in customer service, and soon online (purchase history and interactions with the brand, key dates for the customer, etc.). This ensures personalized recommendations and therefore improves the in-store experience. The app is deployed in 270 points of sale and used by 1,200 sales associates across 25 countries. *"I have confidence in the power of invisible technology that makes our sales associates faster, more efficient, smarter, and more knowledgeable, without dehumanizing interactions,"* assures Séverine Darbois, Client Experience, Retail and E-Commerce Director at Longchamp.

Nonetheless, the tool is still just a tool. The sales associate is in charge. The rapid development of appointment scheduling has allowed sales associates to prepare for customers' visits in advance, freeing them from their screens and optimizing their attention, thereby making the use of tools even more seamless.

This integration of technology into human interaction doesn't seem to bother customers, especially the younger ones who consider it legitimate. As pointed out by a 23-year-old British customer *"I expect the sales associate to establish a genuine relationship with me. I would appreciate if they remembered my preferences and advised me accordingly. I would like this relationship to continue even outside the store, especially for them to suggest pieces that might interest me and hold them aside."*
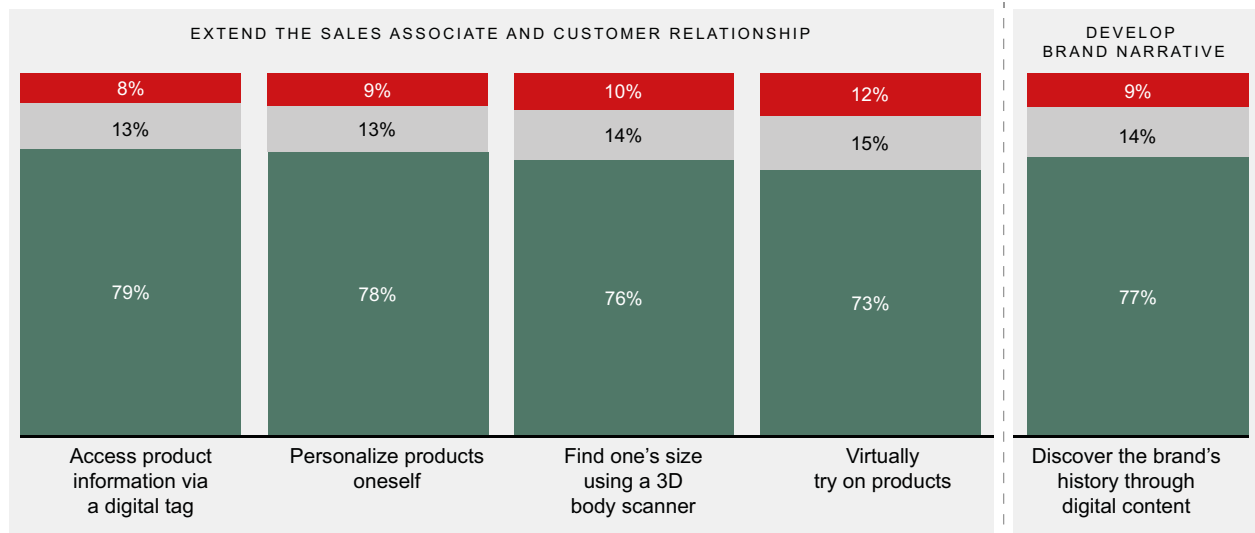
Technology to enrich the customer journey and brand discovery

Beyond the invisible technology that lies hidden behind the sales associate, there is also a strong appetite among customers for tools that aim to enrich their in-store experience and their knowledge of the brand. Two main uses emerge: those that extend the dialogue between the sales associate and the customer by inspiring the latter from a fresh angle around the collections, and those that—disconnected from the actual purchasing journey—develop the brand's overall narrative beyond the boutique and offer an immersion into its universe.

Figure 7: Where the deployment of new technology is likely to be most welcomed by luxury customers

Share of customers willing to use technology for a specific purpose

EXTEND THE SALES ASSOCIATE AND CUSTOMER RELATIONSHIP				DEVELOP BRAND NARRATIVE
8%	9%	10%	12%	9%
13%	13%	14%	15%	14%
79%	78%	76%	73%	77%
Access product information via a digital tag	Personalize products oneself	Find one's size using a 3D body scanner	Virtually try on products	Discover the brand's history through digital content

■ Would use it　　■ Would not use it, without impact on satisfaction　　■ Would not use it and could reduce satisfaction

Source: Comité Colbert and Bain & Company consumer survey (June 2023)

Extending the dialogue between the sales associate and the customer

The first set of uses includes recommendations, product information, customization, and virtual try-ons. They strengthen the relationship with the sales associate and serve the collection's narrative. In the CHANEL boutique at 19, rue Cambon, Paris, interactive mirrors display complete runway looks based on items brought into the fitting rooms, which are identified automatically via radio-frequency identification (RFID) chips. The sales associate can also control the mirror with their app and provide additional suggestions.

"[These mirrors] are not intended to create a 'wow effect,' but rather to serve as a tool facilitating communication between the sales associate and the customer. They are indeed a visible technology, but their true purpose is to seamlessly blend in and act as a simple means to facilitate communication between the customer and the sales associate."
Angeline Durand Sastre, Head of Fashion Europe at CHANEL Mode

Even in premium fashion, where technology is the cornerstone of the customer experience, being supported by a sales associate creates value. At Reformation, for example, the in-store experience is made to feel like customers are shopping online. Shoppers use touchscreen monitors to create a session and add items to their "magic wardrobe," and within a few minutes, their dressing room is stocked with their selection. *"Technology is the heart of the experience of our customers, combining online and offline in a seamless way. That said, our sales associates still play a critical role in the customer journey. The average order value is significantly higher when the transaction is assisted,"* explains Reformation's Borenstein.

In the context of essential omnichannel strategy, which has become more crucial since Covid, luxury *Maisons* are also developing increasingly sophisticated remote consultations. For example, Parfums Christian Dior offers online makeup consultations lasting an average of 30 minutes. These consultations aim to replicate the boutique experience in a setting that recreates the one-on-one relationship with the sales associate to ensure the same intimacy and level of advice and guidance. Virtual trials—made possible through partnerships with Bambuser (experts in video commerce) and Perfect Corp (virtual try-on specialists)—allow products to be tested as if the customer were in the boutique. While these consultations are currently highly effective for makeup, ongoing technological advancements are likely to soon elevate the quality sufficiently to expand their

application to accessories. However, greater challenges are faced in the realm of ready-to-wear, given that factors such as elasticity, fabric weight, and body shape significantly impact how a garment is worn.

Other use cases are particularly focused on enhancing emotions. *"We use technology to improve, enrich, and personalize the customer experience with the goal of strengthening the customer relationship with our Beauty Advisors,"* says Guillaume Legay, International Retail Director at Guerlain. *"We see that this approach also has a significant impact on our conversion rate."* The *Maison* implemented a fragrance consultation station in its Harrods concession in 2019, which has since been widely deployed. Based on the discovery of two fragrance series and the customer's impressions at each step, it allows them to develop their olfactory profile and preferences to guide them through a range of over a hundred fragrances. Leveraging neuroscience, Yves Saint Laurent Beauté's Scent Station offers a 25-minute in-store experience that defines the customer's emotional profile using a headset connected to an electroencephalogram (EEG) that detects brain stimulations, along with an artificial intelligence algorithm that determines the fragrances most likely to be pleasing.

Digital tag—labels to enhance customer experience

Digital tag devices utilize technologies such as QR codes or near-field communication (NFC) to store and transmit information about a product. Designed to be discreet, they are commonly used for tracing products throughout their life cycle.

Details about the origin of materials, manufacturing processes, and care instructions can be accessed through a quick scan of a label. These labels can also serve as an authentication tool: They allow the customer to access their authenticity certificate at any time and can thus facilitate second-hand transactions.

The *Maison* Chloé has embraced this approach—in line with the *Maison*'s ecological and social values— to offer its customers transparency, traceability, and an extended lifespan for garments or accessories. The Digital ID, launched in April 2023 in partnership with EON and Trust-Place, is a QR code (or a chip for shoes) placed on creations from the Chloé Vertical collection (bags, shoes, and ready-to-wear items made from linen, silk, wool, or leather). Each piece in the collection is traceable, with the Digital ID providing access to all information related to the manufacturing process, from the original source of the material to the final production. This digital passport also serves as an authentication certificate, while also including valuable advice to extend the lifespan of the purchase (maintenance and repair). It includes a direct link for authenticated resale—with a unique number—on the luxury second-hand platform, Vestiaire Collective. Currently limited to the Chloé Vertical collection within its spring-summer 2023 collection in Europe, the UK, and the US, this innovative service is set to be expanded to Chloé's entire collections by 2025. From September 2023, all Chloé ready-to-wear collections will be equipped with the Digital ID.

Digital tags—initially regarded as a technology for internal, behind-the-scenes use—are now evolving into tools that extend the relationship between the sales associate and the customer. NFC chips integrated into products are beginning to be used as additional touchpoints with customers: Sales associates can use them to suggest maintenance, repairs, or other services. The *Maison* RIMOWA will offer its customers the ability to register products and download a certificate of authenticity and ownership stored on the blockchain, leveraging the technology provided by the startup Selinko and the Aura Blockchain solution. According to Hassan Benahmed, Chief Information Officer at RIMOWA, NFC technology *"not only allows for easy verification of product authenticity but also enables the simple digital transfer of the authenticity and ownership certificate onto the AURA blockchain in case of resale."*

Taking the customer on a journey through the brand's universe

The second set of use cases is even more immersive. It elaborates on the brand's narrative and image, without being tied to a specific product. It transports customers beyond the boutique and can also enhance the *Maison*'s events.

Christophe Bertin, International Retail Director at Cartier, elaborated on the opportunity: *"One of the objectives of technology is to stir up surprise beyond its functional aspect, to offer memorable and unique experiences to our customers. Discovery becomes a pleasure, bordering on entertainment. It is in flagships and boutiques oriented toward local clientele where we can implement this type of technology, in places where customers are able to spend more time."* For example, Cartier has introduced interactive holographic presentations of its high jewelry collections in Shanghai, where customers can not only observe the products from every angle but also zoom in to discover the jeweler's craftsmanship. Similarly, Van Cleef & Arpels has developed a waiting area in its Place Vendôme boutique to "*take customers on a journey through a discovery of its heritage and craftsmanship,*" according to Alban Belloir, International Retail Director at Van Cleef & Arpels. He adds: *"Technology can help us manage waiting times intelligently, so that the customer remains emotionally connected to the brand before their interaction with the sales associate."*

Considering the substantial investments, larger companies are unsurprisingly progressing faster in this second category. Beyond the size criteria, some *Maisons* are more daring in exploring new technologies, while others are more reserved, choosing not to fuel their brand communications with these digital experiences.

The invisibility cloak

There is demand from a significant proportion of customers for immersive experiences, regardless of their age. This demand is even more pronounced among Chinese clientele (10 to 20 percentage points higher than in France and the United States). However, discretion takes precedence. Among all the experiences that these tools offer, robotic assistance—which is the most visibly identified as technological—is the one that customers reject the most: 19% of respondents feel that a robot would diminish their experience (up to 22% in France and 29% in the United States, compared with just 5% in China); 37% do not wish to use it.

Technology should not be a distraction within the customer journey: The additional emotion it provides should be delivered in subtle touches or integrated into dedicated spaces. "*We create specific zones in our stores for technology-enabled experiences,*" explains Pierre-Emmanuel Placette, International Head of Retail Solutions Development at Cartier. The immersive space, named Studio Treize, offered by the *Maison* in Chengdu (augmented reality, hologram to narrate the brand's heritage and craftsmanship) is integrated within the boutique's journey. The Looking Glass, the recently developed in-store virtual try-on solution by the jeweler in partnership with Jolibrain, is concealed within a decorative element: a lamp on a desk.

Pop-up boutiques can serve as technology catalysts. *"It's important to be cautious with the use of new technologies so as not to become trivial or superficial. To bring life to our collections, we often use digital experiences in an event or pop-up setting, for short periods,"* confirms Alban Belloir, International Retail Director at Van Cleef & Arpels. It was, for example, in this context that Jacquemus presented an automatic handbag dispenser—primarily a marketing operation, but one that highlights the need for dedicated spaces.

The Browns example

Browns, the luxury multibrand boutique owned by Farfetch, serves as the group's laboratory to define and implement its vision of *"Luxury New Retail"*: a completely connected and seamless customer experience between the physical and online worlds. The connections between Farfetch's infrastructure, the Browns website and apps, and in-store operations form the foundation of a unique experience at Browns.

The Browns app for customers is the gateway to the experience pre-, during-, and postvisit in the boutique. At home, while browsing a magazine or social media, the customer can use the visual search feature in the Browns app to find similar items in the Browns catalog, add them to her wish list, and book an appointment in the boutique to touch and try out those products, while getting advice from her stylist.

LUXURY AND TECHNOLOGY. Toward the Boutique of the Future. 2023 Report

Once in store, she is warmly greeted and guided by her stylist through the experience; her fitting room is ready with preselected pieces and, if the customer is willing, a connected mirror—activated as the garment equipped with RFID tag enters the fitting room, showing how it can be styled, displaying other colors and sizes available. On the mirror, the stylist can tap the items not in stock in the store to complete looks and provide styling recommendations.

"The connected mirrors are not there to distract attention away from the physical product, but to bring them to life at the point of consideration and consultation," says Vishal Katelia, Senior Head of Customer & Retail Innovation strategy at Farfetch.

In addition, most of the augmented experience is brought to life through the Browns app when the customer is walking through the store with her stylist: Zoning technologies—especially Bluetooth beacons, QR codes, and NFC—trigger the right content at the right location to enliven the collections and amplify the craftmanship behind each product, as well as bring the story of Browns to life. *"This is not about technology, but how to leverage tech to enrich the relationship between the customer, her stylist, and Browns to bring an extra layer of experience to the journey to create a personalized mini-store for every single customer,"* adds Katelia.

The customer's app is mirrored by a sales associate's app, aiming at empowering them with a go-to tool that enriches the customer's experience and provides value through enhanced relationship-building opportunities vs. manual operating tasks. Through their integrated app, the stylist is connected to a global view of inventory, to the customer profile, to the store operations to control the mirrors and the stock runners, and to the payment and order management systems, all to power a personalized experience for the customer in their presence. Later, when the customer is no longer in the boutique, the sales associate can push items to the customer's wish list to continue conversations and facilitate further engagement.

Browns is pioneering a new approach to the stylist's role and recruitment: Each of them is both a salesperson and an influencer, bringing to the boutique their own community, and triggering new events and partnerships. *"It was very important for us to lean into this new angle of who the sales associate of the future is. Our team are a unique mix of ambassadors, community engagers who are fluent in articulating how to leverage tech to enrich the retail experience holistically. The connected experience is co-crafted with them,"* Katelia concludes.
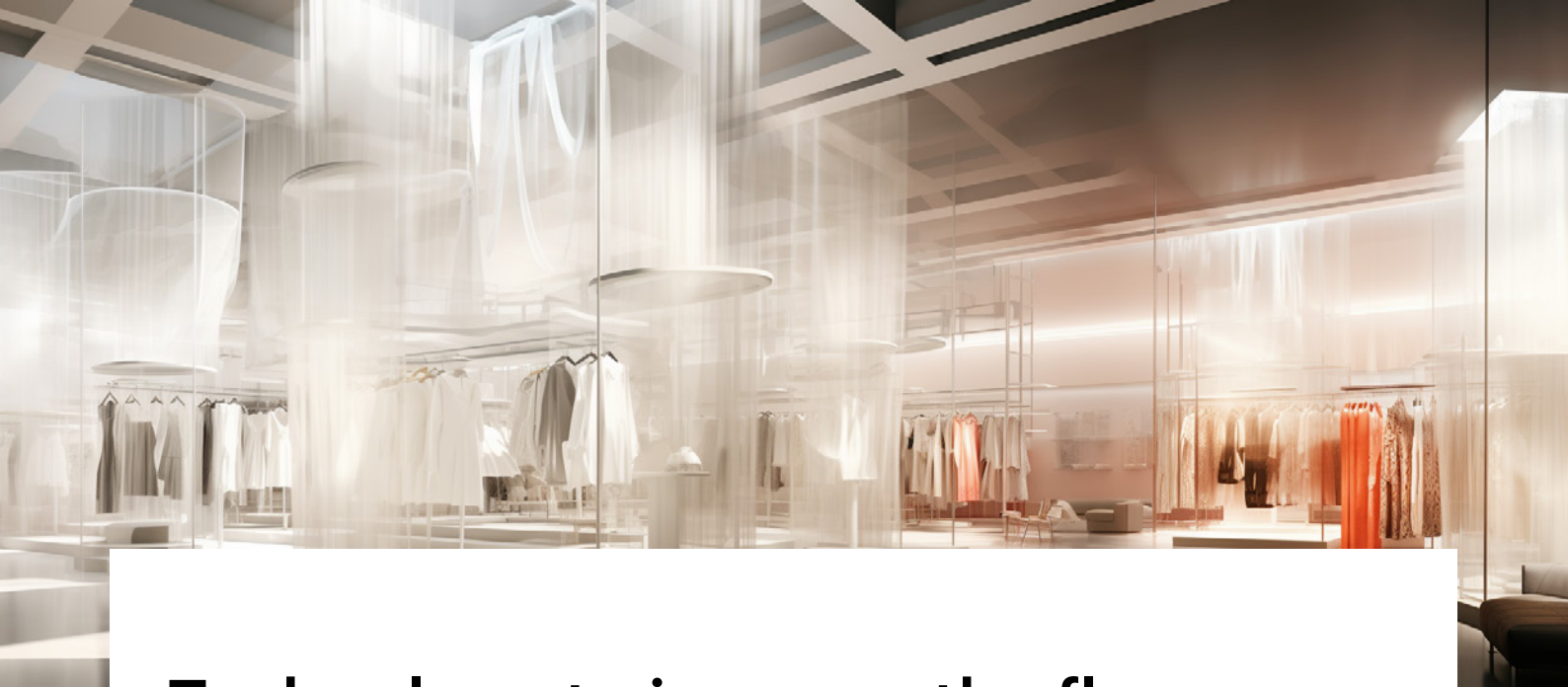
Technology to improve the flow of customer journeys and operations

Minimizing waiting times from entering the boutique to payment

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"The first 20 seconds in a store are crucial for either reassuring or creating a sense of frustration. This is where technological tools can play a role to transform this moment in an immersive way."

Christophe Bertin, International Retail Director at Cartier

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Waiting frustrates 58% of customers (up to 71% in France). New technologies can enhance the customer journey both when entering the store and throughout the discovery and purchasing experience, whether it's to free up a sales associate, receive information, stay informed about product availability, try a product on, or pay. Waiting becomes irritating, especially since it can undermine the perception of a luxurious experience, as stated by an American customer: *"Waiting in line never gives a feeling of luxury, no matter what brands do to entertain their customers."*

Figure 8: The top frustrations for customers when shopping in a luxury boutique

Share of customers citing as a frustration when going to a luxury boutique
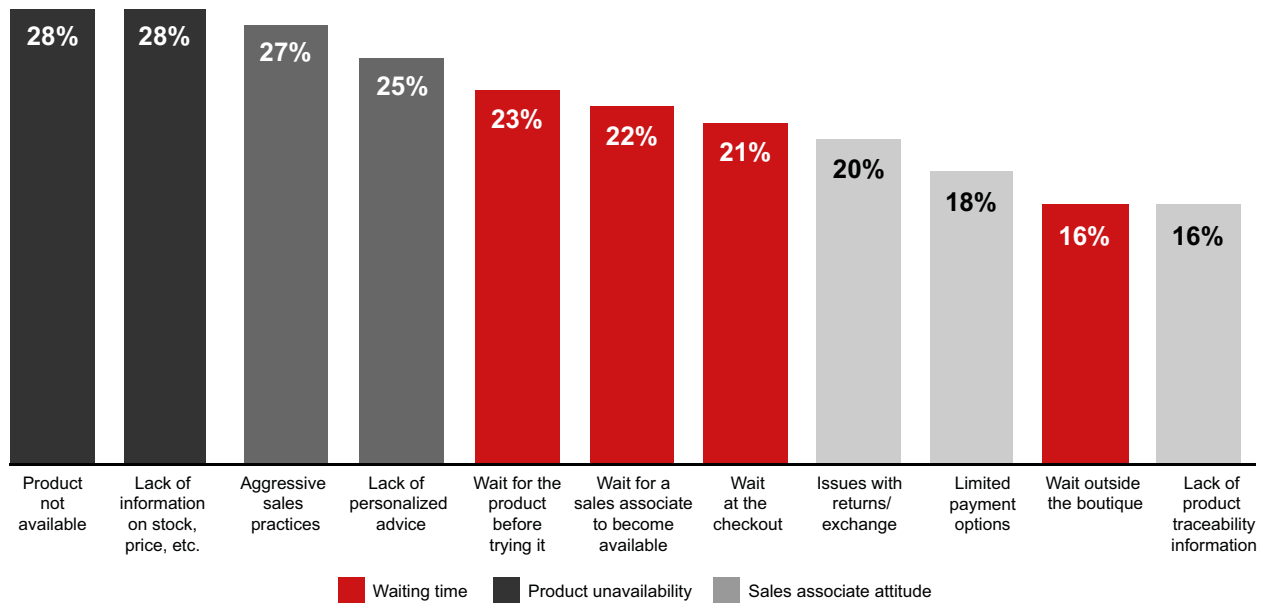
Source: Comité Colbert and Bain & Company consumer survey (June 2023)

Proportion of customers citing as one of their four biggest frustrations

58% Waiting time

47% Product unavailability

46% Sales associate attitude

Source: Comité Colbert and Bain & Company consumer survey (June 2023)

Appointment scheduling is one way that luxury brands are adapting to their customers' demands, by anticipating their visits and preparing interactions with sales associates. For more spontaneous visits to the store (tourists exploring, impulse buyers, admirers of window displays, etc.), queue management tools allow customers to maintain their place in a virtual queue by scanning a QR code, letting them engage in other activities until they receive a notification of their impending turn. This is, for example, the approach chosen by Cartier in China. Depending on product category, there are different ways to handle situations in which a customer is waiting in-store to try on an item. For ready-to-wear or accessories, RFID tags can instantly show if an item is available and where it is (for instance, in the backroom, in a display case, on a shelf, or being tried on by another customer). Deployed by many luxury brands on each product, *"RFID enables much faster stock entry, product tracking in-store, and analysis of product conversion rates,"* explains Orbis Advising's Rinville. *"With the time saved and this information, brands can dedicate even more personalized moments with customers, thus strengthening their loyalty."* However, RFID technology isn't appropriate for jewelry due to technical constraints related to the size of pieces and interference with the metal of display cases. *"During events featuring a limited number of creations, we can precisely geolocate real-time pieces. We are currently testing innovative technologies to localize all products on a boutique scale,"* notes Cartier's Placette.

A comprehensive understanding of customer movements within a retail space could also potentially streamline traffic flow and enhance cross-selling opportunities. While such knowledge already exists for online journeys through the use of cookies, applying it to physical stores is still largely experimental. Creating a heatmap of hotspots within the store (paths, traffic density, time spent in each area, products touched and tried on, etc.) using cameras and visual recognition technology, and then analyzing this data with artificial intelligence algorithms could generate recommendations for in-store navigation flows (category presentation order), display methods (eye-level shelving, window displays, hangers), as well as arrangement of collections (by category, product type, color). This wealth of information has the potential to improve both the customer experience and store performance. However, several constraints, such as the high level of investment required and regulations (especially the EU's GDPR rules, which restrict technologies such as phone tracking or visual recognition) need to be addressed before sustainable solutions can be deployed on a larger scale. Some leading specialist retailers seem to be more advanced in analyzing in-store customer traffic. One of them, for example, has deployed customer flow mapping solutions to meet specific operational needs, such as optimizing the visual merchandising or adjusting the number of sales associates per boutique area. Integrating regulatory constraints, the solutions developed by this specialist retailer combine different technologies to collect data: infrared sensors to count boutique entries; detectors with RFID sensors at certain strategic locations and in fitting rooms. For this retailer, there is no relevant turnkey solution: Technological solutions for analyzing in-store traffic must be tailored to specific operational use cases that can create value for each brand. This player aims to recreate the physical equivalent of the online experience for each product, in order to better understand and optimize product performance.

The payment process—final stage of the in-store customer experience—can sometimes lead to frustrations due to waiting times and impact the overall emotional experience. Some players in industries other than luxury are ahead in this regard, offering the option to pay anywhere without leaving the sales associate's side, using mobile payment terminals or applications on the tools at their disposal. *"These players, especially tech giants, are setting very high experience standards,"* says Thierry Lamouroux, Chief Commercial Officer at Boucheron. *"We must integrate this level of expectation into the experience we provide to our customers."*

Apple's Tap to Pay is currently being rolled out across LVMH's boutiques. It enables sales associates to accept payments through Apple Pay, contactless credit cards, and other digital wallets anywhere in the store using their iPhone, regardless of the purchase amount.

One of the giants in specialized retail has invested significantly in making its customers' shopping experience more fluid. The customer application gives access to a range of functionalities activated by pushing the store doors. Customers can scan a product themselves to check stock availability, activate their loyalty card, or book an appointment online in advance of their visit.

Optimizing stock management

The strong performance of the luxury sector (the luxury personal goods market reached record levels in 2022, 23% above the pre-Covid level of 2019), the associated accelerated growth in volumes, and the complexity of boutique supply have made the adoption of technologies for improved inventory management even more relevant.

We have observed since last year significant progress in the adoption of RFID chips (close to a third of *Maisons* were already using them last year). Their use continues to spread in the luxury sector, even though not all functionalities have been activated yet.

Lacoste, for example, is a pioneer in this field. *"RFID is one of our operational efficiency levers. It speeds up the inventory process and makes it more reliable. It reduces the time to find and move pieces from the storehouse in our large boutiques. We also improve the reliability of our store inventory and our ability to allocate products in real time,"* assures Olivier Peil, Digital acceleration and Innovation Director at MF Brands Group, Lacoste's parent.

For most *Maisons*, real-time visibility of stock is not yet in place. Boutiques are not equipped with as many RFID-equipped detectors as required to enable the use of all the functionalities of the tool, aiming not to compromise the boutique's design and to maintain the standards characteristic of luxury *Maisons*.

Furthermore, the *Maisons* began transitioning several years ago toward optimizing the assortment available in boutiques and better anticipating the necessary stock per point of sale. Algorithmic solutions allow for increasingly precise recommendations based on a wide range of internal and external *Maison* data. The main challenge facing this automation of product allocation in boutiques lies in gaining teams' acceptance of automated decision making. Technology must not become a black box. Boutiques should have complete transparency regarding the criteria that guide the selections of offered products.

The *Maisons* have been exploring new solutions to refine the accuracy of these stock allocations in boutiques for a few years now: *"We are convinced that artificial intelligence can allow us to optimize our open-to-buy. At the same time, we need to be faster and more precise in replenishing our boutiques,"* says Sorin Ciocan-Vladescu, Group Supply Chain and Logistics Director of the Kering Group. Today, this technology is widely used by *Maisons* across a wide range of use cases, both within and outside the boutique. Developing it to improve replenishment and thus product availability has become a priority for everyone, big and small, including Kering, which has already deployed such solutions at Gucci after several years of testing and aims to generalize these tools across the *Maisons* of the group.

Generative artificial intelligence

The revolution of artificial intelligence has been taking shape for several years now, particularly with automation models such as IBM Watson or conversational AI like Google Dialogflow. A new inflection point has been reached today with the launch of GPT-4 and similar models. These new models have notable characteristics: They are designed for general purposes and can pass the Turing test— making it difficult to determine if you're conversing with a computer—they are also trained on larger datasets and can understand and speak multiple languages. We observed last year in the luxury industry that 27% of the surveyed brands had already adopted artificial intelligence for customer
engagement purposes (with a further 17% planning to do so by 2025) and 19% for process optimization (with a further 29% planning to do so by 2025). We can now expect this number to increase significantly with the rise of generative AI, reaching around 80% of tests. Indeed, we are witnessing daily experiments across the value chain of luxury *Maisons* with use cases ranging from customer engagement and sales support to applications in the back office.

The most advanced *Maisons* have prioritized testing customer use cases with AI-augmented sales assistants or chatbots to support sales associates, even though nothing has been fully deployed and made visible to the customer yet. These *Maisons* are at the same time actively considering the impact of generative AI on their internal procedures, including those related to human resources (resume/CV management, job posting, employee onboarding), procurement (generating requests for proposals, analyzing and evaluating supplier responses), or legal affairs (contract drafting, identifying inconsistencies in certain legal documents).

Some applications remain more sensitive for luxury *Maisons*, such as the creative domains where each *Maison* must preserve its unique inspiration to maintain its distinctiveness and brand image. Generative artificial intelligence could help designers to imagine the shapes and creations of tomorrow, based on a large amount of data on trends, colors, etc. These tools are complementary and enhance designers' capabilities, without replacing them.

The experiments seen so far are very promising and can have a positive impact on both the customer experience and the engagement of industry employees. By intelligently integrating generative AI technologies and involving employees early in the thought process, *Maisons* can gain a competitive edge in this area and offer unique experiences for customers, products more in line with their expectations, and even more personalized interactions.
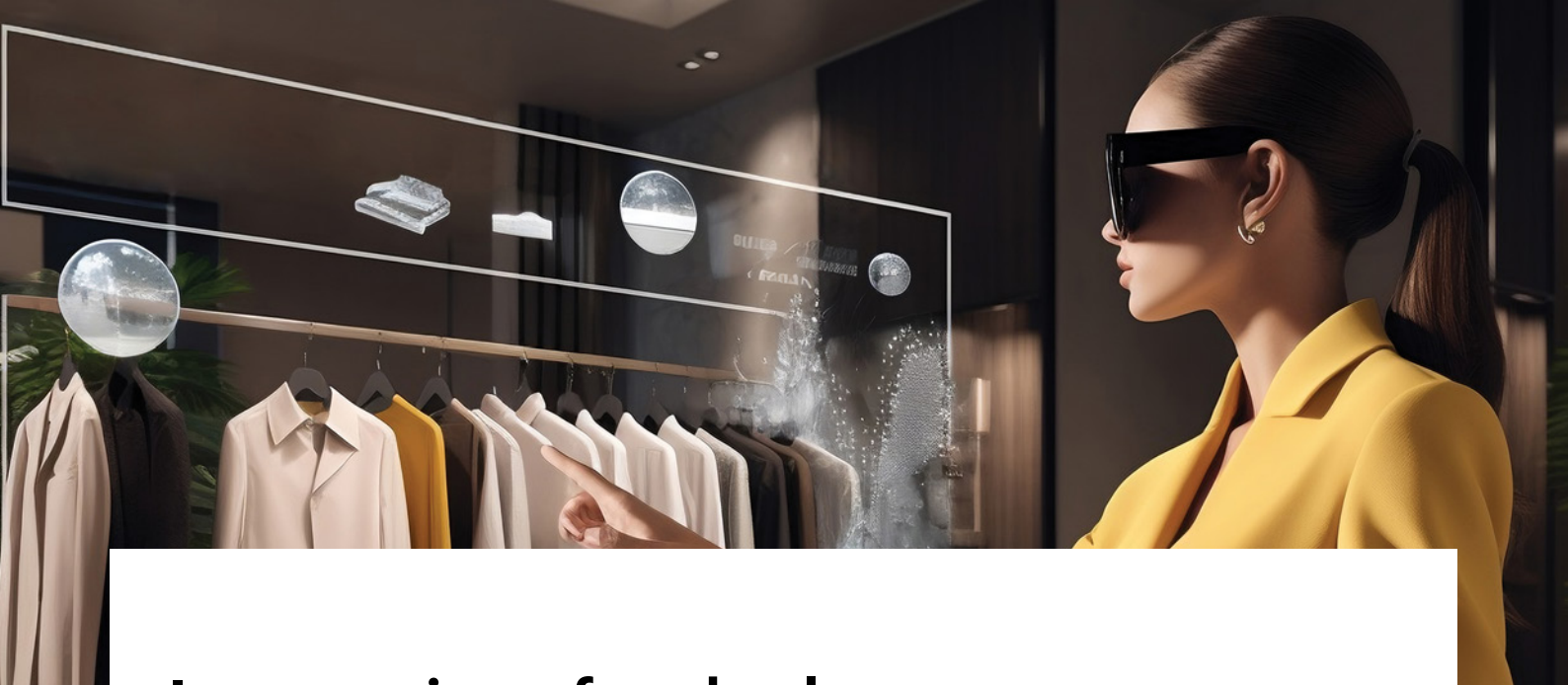
Imperatives for the luxury sector

A cultural and behavioral turning point

The cultural awareness of technological necessity—a major challenge highlighted in our report last year—is beginning to reach a certain level of maturity that requires active support. Some tools originating outside luxury are no longer disregarded, and new specific use cases for the sector are starting to emerge. Today, the *Maisons* have a clarified vision of how they want to use technology in boutiques, primarily to serve a customer-centric approach. It is now essential to convince the entire team of sales associates, who may sometimes perceive its deployment as a threat, by reassuring them about the fundamental role they continue to play in the customer journey.

Training is key for the development of new skills: Beyond the tool's functionalities, it will help standardize behaviors, posture, and gestures. This includes how to hold an iPad elegantly and type on its keys, how to be there for the customer without obstructing their view, as well as which tools to activate and when. Chloé has adopted a native app called Chloé Academy, initially designed to support sales associates during the launch of new products. It has now entered a second phase dedicated to digital and technological aspects to accompany the *Maison*'s customer strategy deployment. The app provides advice to encourage behavioral evolution. The startup ecosystem is actively providing increasingly sophisticated solutions for the industry. For example, 360Learning offers *Maisons* a training platform that empowers sales associates to create their own content (with the support of generative AI), thus promoting transversal learning.

New sales associate profiles are emerging. Those profiles are younger (either in age or in mindset), experienced in digital practices, and more intuitive in the use of applications—especially those related to customer relations. This recruitment strategy is also shared by Cartier: *"We tend to hire professionals with slightly different backgrounds, particularly valuing profiles with experience in hospitality,"* states Christine Lacire, International Business Skills Development Director at the jewelry company. New behind-the-scenes roles are also noticeably supporting sales associates in stock management and inventory. *"As our boutiques become hubs, we are developing roles dedicated to back-of-house operations that can evolve into merchandising and retail operations functions,"* Lacire adds.

Adapting to the new definition of the customer journey

The complexity and omnichannel nature of the new customer journey radically change the approach to customer loyalty. The relationship can no longer be thought of solely from the perspective of the sales associate or even the boutique. It must be cultivated on a broader scale that encompasses the entire brand. It's necessary to break away from the historical culture of individual customer ownership and eliminate conflicts between different channels. Incentives (bonuses, variable compensation, etc.) need to be reimagined, encompassing both physical boutiques and online purchases. Silos must be broken down. *"The concept of customer loyalty tied to a specific sales associate needs to evolve with omnichannel strategies. The customer's affiliation is no longer tied to a specific store but spans multiple locations. One solution is to incorporate average customer retention per sales associate into incentive systems, regardless of the purchase location. Other criteria, such as after-sales service, which plays a vital role in customer retention, should also be considered,"* states Cartier's Bertin. There is also a need to train sales staff in after-sales service: This moment, sometimes perceived as difficult to manage, can be converted into a sales opportunity.

Necessary investments in information systems and data management architectures...

As expected, luxury *Maisons* and groups have embarked on comprehensive digital transformation programs to align the architecture of their IT systems and data platforms, ensuring unified real-time information flows. This encompasses data on customers, products, pricing, stock, and logistics. These data points need to be captured across all touchpoints and flows, while maintaining their quality and adhering to the strictest security standards. The crux of the matter now lies in the enrichment and intelligent analysis of this data, transforming it into value-added use cases.

The architecture of IT systems is undergoing modernization to facilitate exchanges between stores and digital platforms, enable the integration of third-party solutions, and accelerate the pace of innovation to enhance the customer experience.

Within the group, the harmonization of solutions and platforms among *Maisons* is underway. It aims to provide smaller *Maisons* with access to innovation. *"Kering's firepower and significant investment capacity allow it to launch pilots with emerging technologies, incorporate feedback, and then deploy the best ideas to the Maisons,"* notes Grégory Boutté, Chief Client and Digital Officer of the Kering group.

The scale effect undoubtedly works in favor of larger companies, and smaller ones would benefit from joining their efforts and coming together within innovation hubs. Moreover, the data alone doesn't define the customer approach of the *Maisons* but rather how they use it, similar to how a tanner can supply different leather goods makers without producing identical products. Agility and breaking down silos are also key to success in this regard.

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Lastly, the *Maisons* are working to provide intuitive tools to support customer relationships and simplify the daily tasks of sales associates. The company YOOBIC offers an all-in-one business app for this purpose. It integrates internal communication, as well as the ability to perform tasks (checklists, visual merchandising, marketing operations, inventory management, reporting needs to headquarters) and train via mobile learning.

In a more practical yet equally important manner for the functioning of these tools, the *Maisons* will need to rely on excellent in-store connectivity to ensure the seamless execution of technological experiences.

...but also in the very architecture of the boutique

The deployment of technologies in boutiques must be considered in conjunction with the layout of the place: for instance, elimination of traditional cash registers, or creation of dedicated areas for immersive experiences and remote sales spaces. Logistics and storage areas will also need to evolve to adapt to task automation, especially inventory-related tasks. In a broader sense, the boutique itself becomes a mini fulfillment center as it needs to accommodate the omnichannel nature of the customer journey. It will involve spaces suited for shipping and receiving products between boutiques. *"Today, the supply chain, retail, and merchandising need to work hand in hand. The role of the Maisons is to push and support such an organization through technological tools that unite the teams,"* concludes Kering's Ciocan-Vladescu.

31

Methodology

The study was co-conducted by Bain & Company and the Comité Colbert between April and June 2023. Four main sources of data were used to carry out this study:

1. A **quantitative online survey targeting luxury customers**. The sample was drawn from three countries (France, United States, and China) and is representative of luxury customers in terms of gender, age, and consumer categories (from high-net-worth individuals to aspirational shoppers). This survey allowed us to better understand the reasons for visiting boutiques, significant moments, customer frustrations, and their appetite for a range of use cases supported by technology in luxury boutiques.

2. **Qualitative interviews with luxury customers** conducted by Bain Consumer Lab. These interviews tested certain technology use cases in boutiques with luxury customers based in France, China, and the United States.

3. **Interviews with leaders from *Maisons*, groups, and technology partners** to specify technological use cases within the companies.

4. Various documentary research and Bain & Company's experience.

LUXURY AND TECHNOLOGY. Toward the Boutique of the Future. 2023 Report

Acknowledgments

Hassan Benahmed, Chief Information Officer, RIMOWA

Laurent Aymard, Chief Operations and Financial Officer, Saint Laurent

Alban Belloir, International Retail Director, Van Cleef & Arpels

Some members of the Comité Colbert took part in this study but asked not to be named.

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The authors would like to thank **Ginevra Bersani** and **Mathis Favier**, consultants at Bain & Company France, for their participation in the study and their contribution to this report.

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Comité Colbert's mission is conveyed in its raison d'être: to passionately promote, to sustainably develop, and to patiently transmit French savoir faire and creation in order to infuse a new sense of wonder.

Our actions aim to collectively promote French art de vivre on the world stage, to preserve French savoir faire and creation, and to participate in their transmission to new generations.

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