



For publication

# Dune catwalk concept

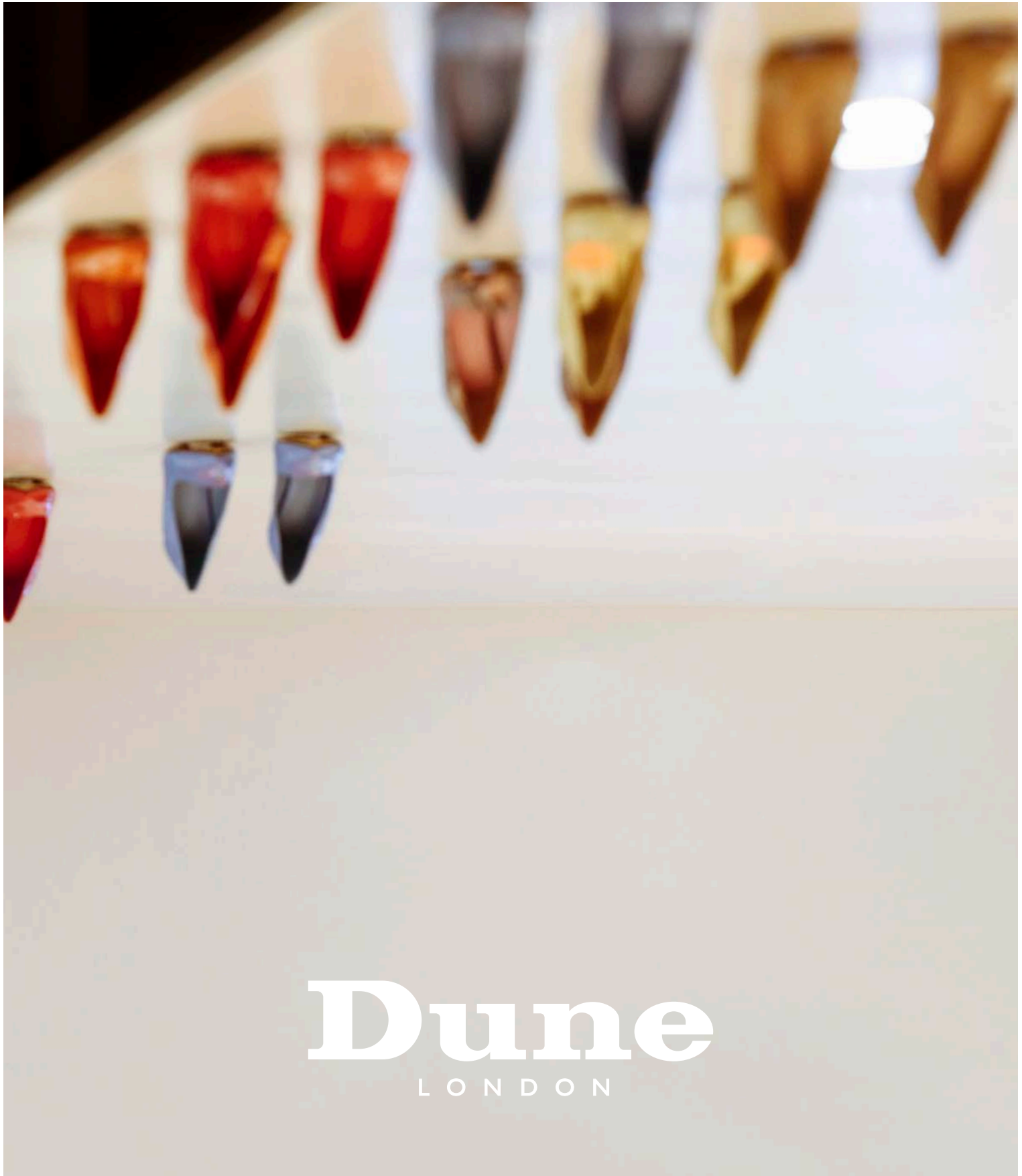
Submission title  
Dune catwalk concept

Industry sector  
Personal goods

Client company  
The Dune Group

Design consultancy  
Four-by-Two Consultants Ltd

Submission date  
30th June 2016





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# Executive summary

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Fashion footwear brand Dune has a vision to be a truly global brand: with a store in every fashion capital in the world. To stand out and to achieve successful trading environments in existing – but increasingly competitive – markets, as well as new ones, The Dune Group recognised that it needed to invest in a new store design that would achieve a number of aims. Four-by-Two was invited to create the new store concept that would have the desired impact and ‘wow’ factor – driving footfall into stores – but also communicate a strong fashion focus, an affordable price-point and unisex appeal, with the power to grow the accessories collection while also providing for the expansion of the men’s product range (a strongly growing market for the brand).



## At a glance

58%

average increase  
£/Sqft than old  
concept stores

30%

growth

70%

increase  
in footfall

30%

uplift in mens  
& accessories



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Every aspect of the store was individually designed to deliver results, highlighting the “affordable-luxury” positioning of the brand. The resulting store design, featuring the inverted ‘catwalk concept’, has had phenomenal impact on our client’s business; providing an iconic identity, and setting its stores apart from their competitors.

**“The Dune ‘catwalk concept’ changed the dynamic of the Dune brand.”**

Daniel Rubin, Executive Chairman and Founder, The Dune Group

**“With that concept, we’ve seen a growth of 30 percent. That’s certainly been our formula for success over the last two years.”**

(Q&A with Dune London’s Daniel Rubin with Footwear News, Oct 14)

- Sales per sq/ft average 58% higher than old concept stores
- New catwalk concept Dune stores, on average (versus company-wide average), have seen a 70% increase in footfall
- Improved showcasing of the brand; and in particular accessories and men’s shoe ranges, combined, now account for 40% of sales in catwalk concept stores: approximately 30% higher than average across all stores
- International presence has tripled in three years.



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# Project overview

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## Outline of project brief

In its early days, Dune was a much more dressy brand, and had aspirations to become a more affordable version of Bally. The product then transitioned towards a younger, clumpier aesthetic before establishing itself as fashionable but wearable, eye-catching but not outrageous. In order to continue growth, a new store design was required to assert Dune at the forefront of “affordable luxury” in the footwear business. The new concept had to meet many criteria to drive the brand forward internationally; and drive growth in key market sectors, including men’s as well as accessories. The brief required the design to elevate brand awareness; and have the power, literally, to stop people in their tracks.

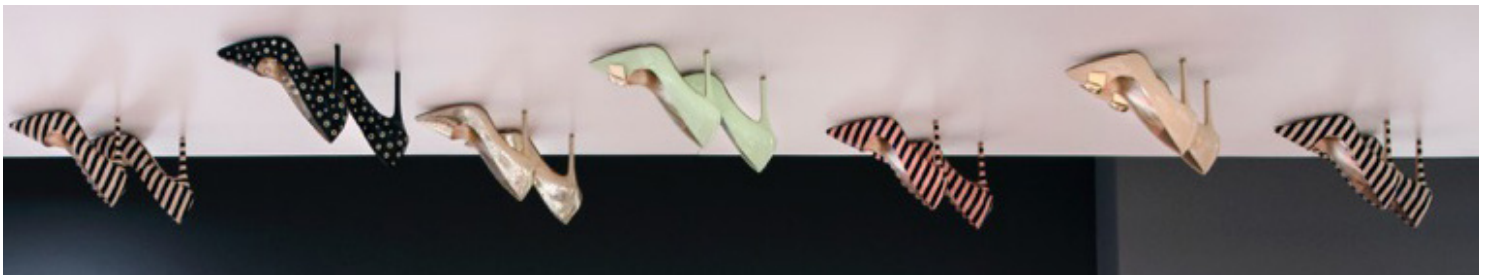
### Objectives for the new concept:

- A new unisex strategy to capture the men’s market
- A showcase store design to attract new international partners
- A departure from the existing brand perception of glitzy / glam to a fashion-focused brand
- Easier to shop
- Flexibility and adaptability for seasonal change
- To have a ‘wow’ factor and a stand-out feature unique to the brand; one which would create a talking point
- To be exciting, open and inviting; attracting new customers but not intimidating or alienating the existing customer
- To be seasonally updatable so as to allow the brand to stay on-trend.

### Description

As Browning Enterprises, Daniel Rubin was one of the leading designers and importers of footwear in the UK, bringing in a whopping 10 million pairs of shoes each year and selling to the likes of Next, M&S and Debenhams.

In 1992, The Dune brand was born in the form of a small concession within an Oxford Street Jane Norman store (a fashion clothing chain); and before long, the first stand-alone store was to open its doors on the King’s Road, in Chelsea, in 1993. Since those days, the company has grown from the first 20 square metre concession in Oxford Street, to a group with 40 UK stand-alone stores, 175 concessions in the major department stores such as Selfridges, Topshop, House of Fraser and John Lewis; and 64 franchised stores and concessions in 10 countries around the world, with most of the international expansion happening since the introduction of the inverted catwalk concept in 2012.







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## Overview of market and challenges

The change in the market for specialist footwear chains has been dramatic. Practically all the big specialist shoe retailers are gone. Tandem was dissolved in 1996, while later casualties include; the 185-store chain Dolcis, which fell into administration in 2008, Faith, which had 78 shops and 120 concessions and went into administration in 2010, plus the 75-store Barratts, which was put into administration for the third time in November 2013 – around the time that the new Dune store concept was starting to be rolled out.

Distribution has also changed beyond recognition. In the early 1980s there was no New Look, and no Primark: the retail landscape was completely different and the strengthening of the footwear offer within clothing multiples has become the biggest challenge for footwear-only chains. It is relatively easy for clothing retailers, and department stores, to carve out a space for footwear; therefore leveraging a diversity of product to help cover big rents. A brand like Zara, for example, sells a lot of shoes – selling them at the bottom of racks or in a corner of its stores. It doesn't have to recover its costs and overheads on shoes alone. It has been inevitable that, sooner or later, specialist shoe retailers would find life more difficult. A footwear-only retailer will always be beaten on price, so they have to have a clear idea of who their customer is and a real focus on product design, along with a store concept that is "something special" for shoppers to really engage with the brand. Unlike fashion retailers, footwear-only retailers require about one third – even up to almost one half – of their store area for stockroom, which puts added emphasis on the efficiency of the sales-floor design.

For Dune, though, the business is continuing to grow by investing in larger stores and bolstering its accessories and men's footwear offers. In 2013, Dune started to roll out the new catwalk unisex store strategy by replacing smaller women's-only shops with larger footwear stores offering women's and men's product as well as a sizeable handbag accessory offer. The results have seen men's sales grow 25% year on year; while individual store performances have rocketed. The company is continuing to expand its property portfolio at home and abroad building upon the success of the strategy – and the inverted catwalk concept.



Project launch date, August 2011



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Really good design is a valuable business tool for clients; and the better we understand their business, and their goals, the better we can design effective solutions. In-depth meetings, getting to know the existing and new Dune customer and prioritising requirements of the brief, were paramount in approaching the new store concept.

## A solution greater than the sum of its parts

Top 10 sum of parts:

- 1 Where possible, any restrictive shopfront was eliminated and replaced with wide-open fronts, increasing footfall; shoppers are not intimidated but can just wander in and take their time browsing. For high-street locations, the shopfront is as open as can be achieved to provide a welcoming, embracing interaction with the customer
- 2 Driving the fashion focus via the inverted 'catwalk': literally an upside down catwalk ceiling feature and fascia panel with shoes strutting the length of it. This dramatic and engaging ceiling feature has metal-clad panels with shoes held in place by magnets. It has become Dune's iconic feature. Customers literally stop in their tracks fascinated by the art-like installation. With the shoes being held in place by magnets, seasonal updates are immediate, changing the look of the store in an instant, always on trend and at the forefront of fashion
- 3 Product is king: the architectural envelope is considered and muted; ceilings and bulkheads are deliberately kept dark and the perimeter bright so that the product glows
- 4 The shop-fit gives equal stature to men's and women's product ranges. It had to be easy to shop as men, typically, do not like to walk through women's product
- 5 The customer journey is made simple with floor fixtures and seating located under the 'catwalk', creating clear circulation routes. The designated seating area also makes it easier for staff to serve efficiently; eliminating pinch points. Customers can try product on without being disturbed by other shoppers. Comfort, both physical and mental, is often overlooked when trying on shoes: unlike fashion retail, almost all customers will try before they buy
- 6 Large campaign images at the front of the store draw people inside and explain what Dune is all about. The fashion focus is sustained from the inverted catwalk to the in-store communication, supporting Dune's fashion credentials
- 7 Video walls scrolling through product-launch and catwalk imagery further add to the fashion environment
- 8 Warmth is brought in, both physically and psychologically, with timber flooring: with the sensation underfoot when trying on shoes being of utmost importance
- 9 Shoes and accessories are small objects in the context of a store environment, and this required careful consideration. Beautifully lit, linear shelving with a contrasting fore-edge creates containment and a strong visual draw
- 10 The key components are designed to work in any store environment, an important consideration, from shopping centres to high streets, and historic buildings to concessions; strong and impactful, communicating the brand message regardless of physical restraints.





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# Outline of design solution

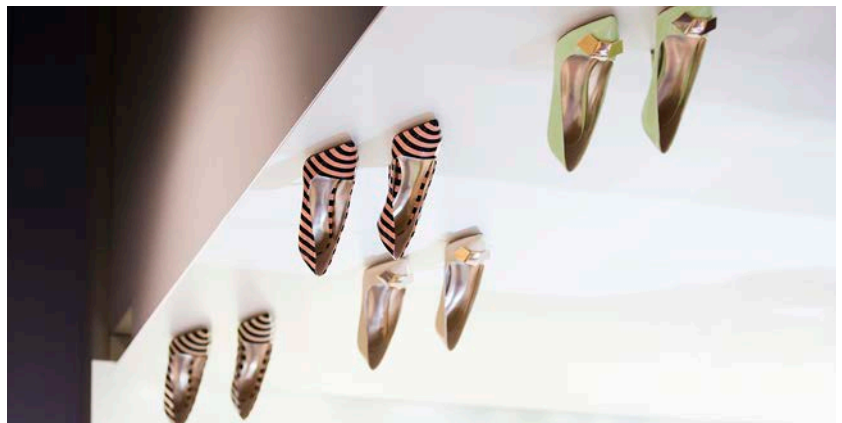
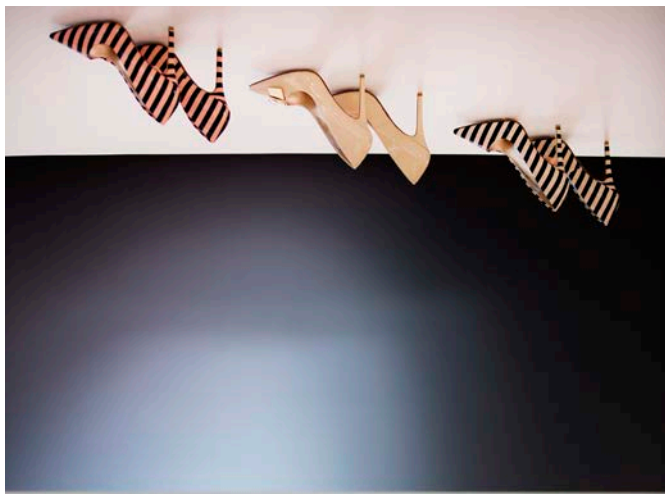
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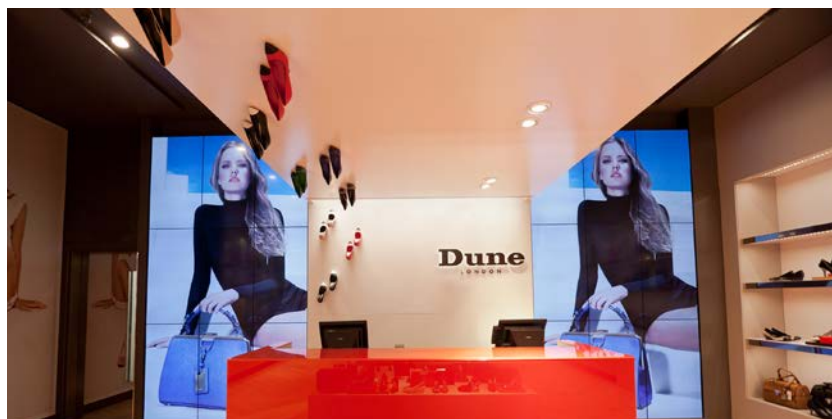
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# Summary of results

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- New concept stores have a 58% increase Average of Ave £/Sqft
- Conversion has increased over the last 3 years by an average 8.7% each year
- Average door count for the quarter from March is 70% higher than old concepts
- ATV in new concepts for the quarter is 2% higher than old concepts
- From Year to Date £/Sqft – 13 out of the top 15 are new concept, the same as the last trading week 20 (wc 13 June 2016)
- The top 7 stores engagement rate (visits over 4 minutes) for the last quarter are all new concepts with the highest being Oxford Circus with 51% visits over 4 minutes
- 8 out of the top 10 highest capture (Passing traffic to customers entering) rates are new concepts
- Improved showcasing of the brand; and in particular accessories and men's shoe ranges, combined, now account for 40% of sales in catwalk concept stores: approximately 30% higher than average across all stores.

2012



2016



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58%

average increase  
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# Other influencing factors

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Whilst we recognise that there are many factors that make any footwear retailer successful: product, price, location, service, stock deliverance, the impact and effectiveness of implementing the catwalk concept is unquestionable.

To look at a specific new refit in White City (May 2016), the two weeks before closing compared to the first two weeks open (this avoids sale periods):

- Door count increased 61%
- Capture rate up 3.5%  
(this increases to 10% if looking at 4 weeks to 4 weeks)  
(passing traffic to entering traffic)
- The average dwell time for the same period increased by 14% to 3 minutes 20 seconds
- Engaged visits (those over 4 minutes) increased by 5%
- Returning customers also increased 17% for the same period.







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# Research resources

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- *Footfall data captured from Irisys installed by Walkbase.com with Wifi analytics provided by walkbase*
- *Sales monitoring by Island Pacific*
- *£/Sq Ft – Calculated weekly by Dune London internal reporting*