

A Work Project presented as part of the Award of an International Master's degree in  
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**How Hugo Boss being perceived by younger generations and how can  
they improve their relation with them?**

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## **I. Abstract**

Explain the question

## **II. Key Words**

**HB-** Hugo Boss

**SEO-** Search Engine Optimisation

**Gen Z-** generation z (1997-2012)

**BOF-** Business of Fashion

## **III. Acknowledgement**

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## **1. Introduction**

Hugo Boss, the German premium apparel brand was founded in 1924, it is known as one of the leading companies in the premium segment of the global apparel market (BOF, 2023) since 1977 it mainly focused on menswear and tailoring and in 1985 the company goes public and is listed in the German Stock Exchange in Frankfurt. Through out time Hugo Boss expanded their portfolio by introducing new brands like Hugo. (Roman Köster, 2011)

The brand has inherited brand awareness through time and although it is, today, in positive growth, a result of internal changes applied by the new CEO, Daniel Grieder, the brand attracts a consumer that is older than the one targeted. The average age of Bosses customer 40 years old and the average age for the Hugo's customer 41 years old. (Appendix 1)

Daniel Grieder states that “over the last six years, Hugo Boss has maintained its brand awareness but crucially lost its relevance in the fashion industry. Heritage is great and I realised that the potential of this brand is enormous — but we have to reframe it.” (Maguire, 2022)

For a brand the effort to keep the relationship with current customers, attract new ones and to make younger future generation customers aspire to them is continuous. Today, brands want to get closer to the generation Z because it is a generation that is growing and influencing older generations as well.

During the research, it was also discovered that a sizeable proportion of consumers, especially those who consider themselves dedicated Hugo Boss customers, mistakenly regard Hugo and Boss one brand, unable to distinguish the variations between them. This misunderstanding creates a picture of Hugo Boss that closely resembles the Boss identity, hindering the group's efforts to identify and sell its distinct brands to different generations.

Hugo Boss, as any known fashion brand had to reinvent themselves constantly to keep up with the market challenges and maintain its relevance in a world where (i.) the premium market is shrinking, (ii.) workwear is disappearing or transforming into a more casual and sporty products and (iii.) the younger generation is growing. Hugo Boss has a lot of challenges to keep their brand relevance and awareness.

This work project aims to understand how this brand can reach a younger consumer having into account their new current strategies. A research on the preferences, needs, consumer journeys, trends, and values of the younger consumer was been conducted, with a specific emphasis on Generation Z and potential recommendations are proposed for the brand to better engage with this demographic.

## **2. Contextual Background**

### **2.1. External Factors**

#### **2.1.1. Current Challenges and opportunities of the Fashion Industry**

According to Mckinsey's state of fashion, making a general observation on the fashion sector, the fashion industry is currently dealing with a variety of difficulties such as rising inflation rates, heightened geopolitical tensions, and expanding environmental concerns, all of which are aggravated by COVID-19. (Mckinsey & Company, 2022)

Consumers are cutting back on their expenditures, while others are actively seeking value and sustainability. Fashion firms are rethinking their strategy, focusing on direct-to-consumer models (Mckinsey & Company, 2022) and adopting environmental measures to keep up with changing customer expectations. In this changing world, fashion firms must maintain a high level of adaptability, originality, and responsiveness to customer needs while also addressing environmental and societal obligations. (BCG, 2019)

Mckinsey predicted that the fashion industry would have a hard time showing growth with the exception of the luxury sector. They projected a relatively slow sales growth caused by a contraction in the European market (Appendix 2). China and the United States are expected to showcase a slow growth. (BOF, 2023) (Appendix 3)

According to Forbes, in 2023 there is a constant search for comfort in the day to day life of consumers, particularly amongst the Millennial and Gen Z and specially after Covid. These generations are more concerned with work-life balance and are less prone to work long hours only to impress with the way they look. Employees are discovering that they can be just as effective in casual, comfortable dress as they are in professional clothes. (Peart, 2023)

When workers feel at ease in their professional clothes, they are more engaged and productive. (Rollings, 2020)

Recognising that customers are more unpredictable than ever, brands need to develop strategies to prepare for a variety of circumstances, as well as meticulously examine every element that may impact buying behaviour in order to respond as precisely as possible to consumers' needs. Brands must determine the sweet spot between engaging with customers while maintaining the brand's favourable image and financial margins. At the same time, firms' marketing and design techniques will need to be updated to reflect altering perceptions about gender boundaries in fashion and dress regulations. Office wear will grow more informal, while special-occasion attire will become more daring. (Mckinsey & Company, 2022)

### **2.1.2. Gen Z as a consumer and trend development today**

“If there is any one secret of success it lies in the ability to get the other person’s point of view and see things from that person’s angle as well as from your own.” (Dale Carnegie, 1939)

According to McKinsey the reason why this generation is so much in focus nowadays is not yet because of their size but because of their impact in the purchase behaviour of other generations. The way they are the ones setting trends in today's world is through social media or even social interaction. For example, Gen X is influenced mainly by interactions in person, and as Gen Z's parents they will listen to their children and get influenced by their purchase behaviour and consumer desires. (Sherman, L., & Lee D., 2022).

Gen Z, accounts for 25% of the global population and are born between 1996 and 2010 and are distinct because they grew up in an era of fast technology, environmental concerns, and social movements such as Me Too and Black Lives Matter, making them both practical and socially sensitive while remaining trend-focused (Sherman, L., & Lee D., 2022).

This generation is sometimes difficult to read because of their diverse and contradictory preferences, their interests change rapidly and for brands to get to them they need to interact with them in a casual, community-focused manner. Although Generation Z will have a big economic influence, they may experience greater financial insecurity than prior generations. (Sherman, L., & Lee D., 2022).

When it comes to Gen Z's characteristics, they are very demanding and have strong beliefs but they are the main generation that is asking brands to have strong and relevant values so in order to satisfy them, companies have to reflect on what they want to be giving to the society and have values supporting their actions. (McKinsey, 2020)

“Nine in ten Generation Z consumers believe companies have a responsibility to address environmental and social issues” (McKinsey, 2019).

So there is a shift on how this generation values a company that is different than any other generation. The way to calculate this value considering their perspective is more complex and multilateral and has into account societal values, status, social influence, etc. (McKinsey, 2020)

When it comes to luxury products Gen Z has a considerable willing to spend on these items but they don't look for logos or name brands, instead they want products that are unique and that set them apart. Uniqueness is something that Gen Z strives for, they want to show their personality and to be themselves by show to others their uniqueness with the products that they buy, they like to be their own people, to have their own opinions, they don't care about what image the brands want to be perceived as having because they will create their own image of the same brands. And this is why niche brands are popping more than ever. There is so much more variety on the ways in which you can purchase from those brands and the overall increase importance of social media to showcase brands and Gen Z themselves has to be considered as well. (Mckinsey, 2018)

Gen z is a generation that purchases usually in an Omnichannel way using their phone more than any other generations as one of the tools in their consumer journey. To influence the Gen Z to purchase, companies have to first get their trust, and the way to get this trust is usually by creating a community of people that the young consumer believes in. As a result influencer marketing strategies are changing and since the big influencers or celebrities are not persuading this generation so easily anymore brands are using smaller scale influencers that reach to less people at once but have this generation's trusts. Brands that are having more success in their marketing strategies are the ones that are using micro influencers where they can have a more discrete approach on their way to conveying their products. (McKinsey, 2020)

What is in style is mostly determined by the customer. The rise of social media, inextricably linked to technical improvements, has given people the ability to discover their voices. They are no more passive consumers of fashion offers; instead, they have embraced internet platforms to express their personal style, ushering in an era in which their individualism holds tremendous influence over fashion companies and businesses. (Silveira, 2023)

“Brands once unilaterally controlled their brand narratives. Today, brands engage in a multi-directional dialogue that is often driven by customers themselves across a variety of social media platforms.” (BOF, 2023)

### **2.1.3. Challenges of the middle Market and how to overcome them**

Premium Industrial brands are often distinguished for having a loyal customer base and their revenue is mostly derived from timeless items, which typically make up to 20% of the collection shown each season. The risk of the middle market disappearing is one of the many challenges facing the fashion industry today and this is where brands like Hugo Boss is localised. This was a successful business strategy up until the 20th century, but as customer needs and desires change more quickly nowadays and business models like designer brands are starting to offer entry-level products and improving their sale channels while at the same time fast fashion brands are rising and offering more quality products and improving their services on a daily basis. This makes it very hard for a premium brand to have a competitive advantage. As a result of this challenge the mid market and many of the brands that are localised in this sector are suffering a decline in sales and profit. Furthermore, when contrasted to business strategies such as Fast Fashion, the lengthy lead time required by these firms to get their items to market puts them at a disadvantage. Fast Fashion brands, in particular, provide items that are increasingly comparable to those of luxury brands but have quicker time-to-market cycles and cheaper price points. (Silveira, 2023) As a result, only premium brands with a very distinctive personality can survive and prosper in this competitive marketplace. (Lancaster, 2002) To survive, Premium brands have to lean on strong points of difference such as a strong brand identity, specific know-how or techniques or explore and develop a specific local perception, and it is crucial that these brands create customer loyalty. (Silveira, 2023) (Appendix 4)

## **2.2. Internal Factors of Hugo Boss**

### **2.2.1. History**

Hugo Boss is a high-premium fashion brand that was founded by Hugo Ferdinand Boss in 1924 in a small German town called Metzingen. It started to be a clothing factory that was known, during its most recent years for designing the military uniforms for the German army and the social nationalist party during the World war II. But it's only during the 1960's that the brand regains power and space in the market when suffering a reshaping into the international fashion group it is today. This transformation was directed by the Holy family, Jochen and Use Holy who were the ones taking over the company and who introduced the off-the-peg suits for men and registered the BOSS brand in 1977 as a brand mainly focused on menswear and tailoring. In 1985 the company goes public and is listed in the German Stock Exchange in Frankfurt. Through out time Hugo Boss expanded their portfolio by introducing new brands like Hugo, that still exists today, they introduced womenswear with Hugo in 1998 and with Boss in 2000 and created various lines that caters to a loyal customer that wants to be able to wear Hugo, Boss or both 24/7. (Roman Köster, 2011)

### **2.2.2. Brand Identity**

If we take Kapferer's identity prism (Kapferer, 2004) (Appendix 5) approach to Brand identity Boss has as its physical characteristics their logo, the heritage suit, their colours which are black white and camel and the slogan "be your own boss". In terms of personality, The new BOSS is bolder, more contemporary, and more impactful. In addition, Boss wants to offer products that make their customer feel younger, more playful, and more casual. So the ideal customer would be men and women around 27-43 years old that believe in themselves and create their successful paths. They are people who don't let fear stop them achieving what they want in life. (Hugo Boss, 2023)

Boss aspires their customer to feel encouraged to lead a self-determined life and believes that everyone can be a BOSS, “because being a BOSS is about chasing your own dreams, finding your own purpose and being whatever you want to be.” (Hugo Boss, 2023).

When it comes to culture, both Boss and Hugo share the same culture which is represented by the group’s slogan : “we love fashion, we change fashion” (Hugo Boss, 2023). Their main goal is to have its customer at the centre and ensure that “product is king” through innovation, digitalisation and an Omnichannel approach. (Hugo Boss, 2021)

Hugo on the other hand has some characteristics that distinguish its brand identity from Bosses. Their main physical features are their Hugo logo, the colour red and recently the added colour blue for Hugo Blue, products have edgier designs and have more patterns and younger silhouettes. If Hugo were a person it would be a young minded person that is starting their career and has still an authentic and unconventional way of being. (Hugo Boss, 2023)

Hugo offers fashion items that are a bold mix of contemporary and commercial pieces underlines the authentic HUGO DNA. (Hugo Boss, 2023) Grieder says “When somebody has finished studying and is starting their first job, the first suit they’re going to buy is a Hugo suit,” (Lucy Maguire, 2022). So their desired customer would be part of the Gen Z or someone that has a young spirit and is fashion forward, and not afraid to try new things and ready to start a great career. Lastly Hugo wants to encourage young generations to go their own way they aspire to be the #1 brand for those out there who like to set trends instead of following them. The brand stands for individualism and self-expression.

### **2.2.3. New strategy: Building brand equity**

Daniel Grieder was chosen as the brand's new CEO in 2021, and took the initiative to spearhead a major rebranding project. The firm revamped its goods, branding, and internet

presence under his leadership, with the overriding objective of doubling the German company's revenues to €4 billion by 2025 (BOF, 2023) and join the ranks of Interbrand's top 100 global brands. The new strategy was applied in the beginning of 2022 which, until now, has brought so much progress for the company that they decided to go beyond their first ambition and, as stated in Forbes in 2023, they are already pushing their goal to a higher revenue goal. In 2022 Hugo Boss declared it would aim to reach \$5.6 Billion By 2025. (Pamela N. Danziger, 2023)

*“We have given our iconic brands BOSS and HUGO a younger, bolder, and more emotional image than ever before.”* (Hugo Boss, 2023)

### **2.2.x. Merchandising**

The organisation currently represents two unique brands. Boss Menswear contributes a sizeable 79% of the company's overall revenues, is primarily responsible for Hugo Boss's success. The general. Brand Hugo, comes in second place with a 15% share of sales, while Boss Womenswear is responsible for the remaining 7% (Statista, 2023)

When it comes to the brand Boss it is a brand that strives to be more than just a brand; it aspires be a lifestyle brand that accompanies customers around the clock, throughout the entire year. The versatility of Boss allows individuals to wear it for any occasion, from work to workouts, from sleep to leisurely walks with their pets. It even extends to dressing children in Boss attire, they offer Boss accessories and incorporates daily routine items like towels, slippers and stationery products. In terms of lines, Boss Black is more focused on business and formal wear, Boss Camel in high quality tailoring, Boss Orange into casual day-to-day clothes and Boss Green on sportswear. In essence, Boss is the embodiment of the customer's Boss lifestyle in order to create brand loyalty.

### **3. Addressing the work project**

#### **3.1. Methodology**

The main research objective was to understand what generation z is looking for as a consumer in the fashion market and then align that with possible recommendations to Hugo Boss so that the brand can attract the younger generation. The research design combines primary and secondary data collection methods, with a primary emphasis on qualitative analysis. Primary data collecting was to acquire an understanding of Generation Z's current perceptions and relationships with fashion brands. It also attempted to discover what they want for the sector's future, their demands, and the current trends in purchasing behaviour among this group. The exploratory method was divided into three stages: (1) Data was collected through twenty-one semi-structured interviews, all of whom belonged to the Gen Z age group and were customers of premium brands, to delve into a wide range of themes without the imposition of right or wrong responses. (Appendix 6) Firstly, and without any visual cues, participants were asked to recall fashion labels they appreciated and purchased. Second, a visual stimuli was displayed with ten brands, including Hugo, Boss and their competitors. (Appendix 7) Additionally, a projective technique was used during the interviews. Participants were asked to assign personality attributes to both the brand in question, Hugo Boss, and another brand mentioned frequently throughout the interview if they weren't aware of the brands differentiation. Those who were aware about the difference between Hugo and Boss were asked to provide distinct personalities for both the Hugo and the Boss brands. Finally two campaigns were shown, one from Hugo and one from Boss and participants were asked to react to these videos, touching again on the awareness about the differentiation between the 2 brands and understanding if their perception of the brands changed after watching the campaigns. These interviews were videotaped with the participants' permission and transcribed for analysis (see Appendix 6 and 9 for the pre-interview survey and interview

guide). The sample was composed by twenty one people living in Europe participated in a semi-structured interview. These interviewees were between 17-26 years old, 10/21 were male and 11/21 female, 15/21 were working and out of these fifteen, three were worker students, the other six people included five students and one unemployed person. (Appendix 8) (2) Data Analysis: The goal was to identify recurring patterns and insights pertaining to Generation Z as fashion industry consumers, with a particular focus on their perceptions of Hugo Boss.(3) Discussion: Following an in-depth discussion of each relevant topic, a more precise and comprehensive set of recommendations was formulated by comparing the findings from these interviews with existing knowledge about trends and conditions in the premium fashion sector, as well as Generation Z's perspectives on fashion.

## **3.2. Results and Discussion**

This section of the paper will investigate the findings from the gathering of primary data, which will be divided into specific categories, reflecting the customer's perceptions of the brands Hugo and Boss, as well as their fashion buying behaviours, values, and desires.

### **3.2.1. Consumption trends among the generation Z**

Through 21 conducted interviews, four prominent trends emerged within Generation Z: a growing inclination towards investing in and showing interest in the second-hand market, a decreasing sense of brand loyalty, a conscious effort to consume mindfully, and a prevailing sense of suspicion and skepticism regarding advertising and marketing communication strategies.

#### **3.2.1.1. Increasing interest on the second-hand market**

With 15 of the 21 participants revealing a preference for buying second-hand clothing. This pattern highlights a significant consumer behaviour within the sampled group, indicating a

growing awareness and acceptance of sustainable shopping practises. Further discussions revealed that these individuals value not only the environmental aspect of second-hand fashion, but also the uniqueness and affordability it provides, being now possible to buy pieces from premium brands that show great quality for affordable prices.

*"thats also why I buy second hand clothes it takes off a bit of my guilt"* (Male, 24yo)

*"there are a lot of brands today that have bad materials and vintage you find pieces that have nice materials"* (Female, 25yo)

### **3.2.1.2. Decreasing sense of brand loyalty**

Out of the 21 participants, 8 indicated that they do not pledge full loyalty to any specific brand. Some among them expressed a preference for a list of brands but remained highly receptive to purchasing from brands they are less familiar with particularly in the context of the second-hand market.

*"I think I am not very loyal to a brand because I focus more on the quality and the designs, if I like the design of a brand I will buy it, even if I like others brands more"* (Male, 17yo)

*"I think I am loyal to certain brands but I also buy a lot of things on Vinted and there I don't care much about the brands"* (Female, 20yo)

### **3.2.1.3. Conscious effort to consume mindfully**

Ten of the twenty-one respondents expressed a conscious effort to be mindful in their consumption patterns, demonstrating, for example, a commitment to minimalism by cultivating a capsule wardrobe that consists only of essential and frequently used items, or they emphasised their deliberate intention to exercise mindfulness in clothing purchases, motivated by both sustainability concerns and a desire to alleviate feelings of guilt associated with consumption. This reveals a significant trend among respondents, highlighting a general

shift towards mindful and sustainable fashion practises. These individuals' nuanced approaches demonstrate a growing awareness and engagement with more deliberate and eco-conscious choices in their consumption habits.

*“I’m trying to be minimalist, I prefer to invest in good pieces and only have pieces I really need”* (Female, 24 yo)

*“lately I think a lot about the green footprint of the clothes that I have so now I’m more interested in these types of factors”* (Female, 21yo)

*“what I buy works like a vote for the future that I want”* (Female, 25).

#### **3.2.1.4. Suspicion and skepticism regarding advertising and communication strategies**

The study's forth trend is intricately linked to the promotional campaigns presented at the end of the interviews. Respondents show heightened awareness of the underlying intent behind brand marketing communications in a broader context. -

*“A lot of times ads don’t represent and show how you can style the pieces and adverts feel very fake”* (Female, 25yo)

Notably, participants appear to be less vulnerable to the influence of advertisements. Instead, they prefer genuine and meaningful connections with brands that convey relevant messages.

*“I like the second one better, it touches the heart more”* (Female, 19yo)

This represents a shift away from merely seeking a visual representation of identity through slick and professionally produced videos, emphasising a growing emphasis among those polled on the authenticity and resonance of brand messaging.

*“the Hugo campaign I didn't like, it is confusing, the styling is not that interesting, the way it is filmed doesn't let us see the clothes, in general I think it is a failed attempt to seem young”* (Male, 25yo)

*"and i think it is a bit manipulative, both" "the first I think is manipulative and the second I think it is an appropriation of the youth culture"* (Female, 25yo)

### **3.2.2 Most important factors when purchasing**

#### **3.2.2.1. Physical Dimension of Clothes**

Variability, genuine necessity, durability, quality, material composition, ease of combination, and timelessness were all important factors in respondents' purchasing decisions and all of these were related to a common idea, the younger consumer demographic prefers to invest in pieces that last over time, over fleeting trends in their purchasing decisions. Notably, 14 out of 21 respondents emphasised the importance of quality when purchasing clothing, while 11 out of 21 emphasised the importance of materials. Three respondents also added that they take a close look to materials for comfort and sustainability reasons and specifically stated a preference for avoiding plastic-based materials such as polyester. There is a tendency among respondents to adopt a quality-over-quantity mindset.

#### **3.2.2.2. Value Dimension**

Price is an emerging factor to be taken into consideration as well, being mentioned by 10/21 respondents, 6/21 respondents indicated a willingness to invest in higher-priced items, citing quality as a deciding factor.

*"quality, I think makes me buy something more expensive"* (Male 19yo)

Notably, one participant emphasised the importance of timelessness as a factor to consider when making slightly more expensive purchases:

*"Timelessness, if I know that I'm going to wear a piece for a long time than I will maybe spend 100€ on a shirt"* (Female, 22yo)

### **3.2.2.3. Self-expression dimension**

The study uncovered another significant dimension centered around the desire for self-expression and affiliation. 6/21 respondents highlighted the pivotal role of uniqueness as a key factor influencing their fashion decisions. This emphasis on uniqueness was intricately linked to the self-expression and showcase of their own distinct identity.

*"Uniqueness, I prefer to buy a brand that most of the people don't buy, I like to bring something new to the society instead of following trends"* (Female, 20yo)

Furthermore, an equal number of respondents emphasised the importance of adhering to a specific style and focus on the aesthetic dimension of fashion. It's noteworthy to highlight as well that a significant subset of respondents, precisely 6 out of 21, explicitly expressed a preference for abstaining from brand showcasing and demonstrated a disinterest in logos. This particular sentiment underscores a growing trend among younger consumers who prioritise personal style over brand showcasing. This inclination may be indicative of a shift towards a more individualistic approach to fashion, where the emphasis lies on the intrinsic qualities of the clothing rather than the overt branding.

*"I don't care about the brand, I hate logos, the less logos the better"* (Female, 25yo)

### **3.2.3. Influencing Gen Z**

#### **3.2.3.1. Community, Friends and Family**

Several influential factors shape the perspectives of the interviewees. 11 of the 21 respondents mentioned the influence of their friends, while 5 of the 21 mentioned the influence of their community as well.

*"I love to take recommendations from friends, friends are probably my main influencing source"* - (Female, 22yo)

#### **3.2.3.2. Social Media**

Furthermore, 5 of the 21 participants acknowledged the importance of their family when it comes to inspiration. Notably, the majority of respondents, ten out of twenty-one, admitted to being influenced by social media platforms such as Instagram, TikTok, and YouTube.

*"Essentially instagram is my main source of inspiration, my algorithm really found my taste"* (Female, 20yo)

### **3.2.3.3. Other sources of inspiration**

Another 5 of the 21 respondents actively engaged in Pinterest research. Other notable influences included street fashion, which was mentioned by 6 out of 21 participants, magazines, which was mentioned by 3 out of 21, films or series, which was mentioned by 4 out of 21, and travel experiences, which was mentioned by 3 out of 21 respondents. Finally, three of the twenty-one participants were inspired by nostalgic elements such as old advertisements, family photos, and iconic figures such as Princess Diana. This wide range of influences emphasises the diverse and multifaceted sources that contribute to the fashion perspectives of the interviewees.

*"I get inspiration in past memories, I'm very nostalgic, I get inspired by the way my parents dressed"* - (Male, 24yo).

### **3.2.4. Brand image of Hugo Boss, Hugo and Boss**

#### **3.2.4.1. Lack of awareness regarding brand differentiation between Hugo and Boss**

As expected the survey results revealed a notable lack of awareness among respondents, with 18/21 expressing unfamiliarity with Hugo and Boss's distinct identities as separate brands. Surprisingly, those who did have this awareness were mostly active customers of the brand or people with professional ties to the brand. Only three of the seven respondents who owned items from the brand were aware of the brand's bifurcation.

*"You assume that the brands are all the same"* (Female, 24yo)

*"I didn't know there were 2 separate brands"* (Female, 26yo)

This realisation highlights a significant communication gap regarding brand structure, emphasising the importance of improved brand differentiation strategies. The disparity in brand awareness, particularly among brand owners, suggests a potential disconnect in communicating brand distinctions to a broader consumer base. Addressing this understanding gap is critical for effective brand communication and consumer engagement, indicating a strategic priority for Hugo Boss.

*"the problem of Hugo Boss is that the way that they put themselves in the real world is very different from what they are communication in the campaigns"* (Female, 22yo)

#### **3.2.4.2. Brand Image through a projective technique**

All participants were subjected to a projective technique during the interviews in which they addressed their perceptions of Hugo Boss. Both Hugo and Boss, the two brands, were consistently referenced if the respondents had an awareness on the distinct brands within Hugo Boss. To the other 18 respondents who were not aware of this differentiation were presented the brand Hugo Boss as a whole and another brand that the participant had mentioned during the interview, In this context, we could interpret that the brand image of Hugo Boss is being assessed in relation to another brand that the respondent has purchased or favoured, possibly indicating a stronger identification with the latter. From the 3 respondents that described Hugo and Boss as different brands, Hugo was described as a man in their 20s by 3/3 respondents and participants described him as a chill person that is discovering the world, that has his head in the clouds and doesn't yet know what he wants. Boss on the other hand was also described and a man, but in his mid, late 30s that is part of the upper class he is formal, composed, knows what he wants and works in a corporate job.

From the respondents that didn't know about the distinction between brands 14/18 described Hugo Boss as a masculine brand and 12/18 imagined a person who was a CEO or in a high corporate position. The age gaps varied from 30s to 50s where 7/18 said they would be around their 40s, 9/18 mentioned maybe in their 30s and 4/18 indicated around their 50s or even late 50s. Additionally, 5/18 respondents associated the brand to a father figure.

The characteristics most described were being a high/middle class person (4/18), serious (3/18), classic (3/18) decisive or focused on goals (3/18), formal (3/18), casual (3/18). The majority of the adjectives employed carried a positive connotation, suggesting that the overall image the interviewees held regarding the Hugo Boss brand aligns closely with the brand identity of Boss. However, participants, tended to amalgamate both brands, causing the distinct personality of Hugo to effectively fade into the background.

When the insights gained from the interviews regarding the brand perceptions of Hugo and Boss, as well as their combined entity Hugo Boss, are juxtaposed, distinct conclusions emerge. (i.) Hugo's image appears significantly understated only by individuals who actively sought information, maintained connections within the company, or were professionally affiliated with Hugo Boss. Instead of simply shaping the right image, Hugo must establish a distinct identity that operates independently of Boss. (ii.) The descriptions of Boss and Hugo Boss as an integrated brand entity are very comparable. As a result, the image associated with Hugo Boss is primarily that of Boss. This convergence implies that the brand image is closely aligned with the identity of Boss. This correlation is consistent with the findings of the BOF index on brand image accuracy (BOF, 2023) (Appendix 10)

When we apply Kapferer's identity prism model to the descriptions provided during the interviews, we find that the characteristics encompassing suits, perfumes, neutral colours, and timeless styles correspond to the physique slice of the Boss identity. Within the personality

slice, adjectives such as upper/middle class, classic, decisive, formal, casual, elegant, fighter, or self-possessed appeared. In contrast, the disparity arises when comparing the cultural facet that the brand wishes to project to the communicated message. Despite the brand's stated mission of "we love fashion, we change fashion," the interviews show that this doesn't align with the brand image. 2 of the 21 participants specifically described Hugo Boss as a persona who was indifferent to or uninterested in fashion.

*“a person who likes to dress well but is not super obsessed, they don't follow trends, they have a safe style”* (Female, 26yo)

Participants emphasised that Hugo Boss is known for producing high-quality clothing, perfumes, and essential basics, forming a significant segment within the brand prism's relational aspect. However, as with cultural representation, it was emphasised that these aspects fall short of the desired standard that the brand seeks to convey.

### **3.2.5. Communication campaigns**

In the final segment of the interview, participants were shown two different advertising campaigns, one from Boss and one from Hugo. The purpose of this part was to see if exposure to the campaigns influenced a change in participants' perceptions, increased brand appeal, or maintained pre-existing attitudes. The overarching goal was to gain insights into how these brands' communication strategies resonate with the sensibilities of the younger consumer.

#### **3.2.5.1. #HugoYourWay**

Participants' reactions to the Hugo campaign were varied, revealing nuanced perspectives. Out of the total number of respondents (21), 7 were positive, 7 were neutral, and 7 were negative, indicating that the campaign resonated positively with only one-third of the participants. Despite participants quickly grasping the brand's intended message, only 2/21

participants expressed heightened attraction to the brand following campaign exposure. Conversely, a notable 4/21 participants explicitly indicated an inclination to either skip or easily forget the campaign. Another factor mentioned was the element of speed, with 6 respondents highlighting and criticising the advertisement's fast-paced nature that prevented them to see the clothes well. Furthermore, 5 participants felt that the campaign's attempt to portray a youthful and cool atmosphere fell short and appeared desperate.

**“I think it is an appropriation of the youth culture”** (Female, 25yo)

### **3.2.5.2. #BeYourOwnBoss**

The resonance of the Boss campaign was particularly strong among respondents, with a large majority of 18/21 actively preferring it over the Hugo counterpart. A sizeable proportion, 13/21 respondents, had a favourable reaction to the Boss campaign. Notably, six participants in this subset expressed increased brand affinity, as evidenced by one respondent's comment.

*“the personas are wearing classic and good quality fits, there is a very well done communication done, this video makes me feel more attracted to the brand”* (Male, 24 years old)

This positive sentiment reflected an appreciation for Boss's classic aesthetic and effective communication. In contrast, 4/21 participants remained neutral, while an equal number expressed a negative reaction to the Boss advertisement. One participant expressed disinterest by saying: *“it feels like the brand is begging for attention, and they don't need it”* (Male, 25 years old).

Despite these mixed reactions, the Boss campaign aligned better with participants' pre-existing perceptions of the brand. It is worth noting that two participants, while acknowledging the campaign's alignment with their expectations, expressed surprise at the

brand's actual message. This nuanced feedback emphasises the complexities of consumer perceptions and how they interact with advertising messages.

The primary findings of this study significantly contribute to answering the research question and shed light on important aspects of Generation Z's consumer behaviour and perceptions. Brand managers gain invaluable insights by unravelling the motivations that drive younger consumers, such as a preference for quality, a desire for uniqueness, and a commitment to conscious purchasing. These insights serve as a strategic foundation for tailoring marketing approaches that are appealing to the target audience, positively impacting brand image alignment with the intended brand identity. The study reveals an apparent gap between young consumers and the brands under consideration, emphasising the need for nuanced strategies to bridge this gap. To ensure that the communicated values and practises are perceived as intended, a meticulous approach is required.

## **4. Recommendations**

### **4.1. Boost brands**

The primary suggestion is for brand differentiation within the context of the five-part strategy outlined as "Boost brands." Rather than focusing on increasing the relevance and perception of both brands uniformly, it is proposed that a greater emphasis be placed on the Hugo brand. Given that Hugo specifically targets Generation Z, the brand's use of a strong Gen Z influencer, such as Tube Girl, for Boss rather than Hugo raises a critical question. This strategic misalignment risks sending a confusing message to the consumer, blurring the distinct communication styles of Boss and Hugo, and hindering comprehension of each brand's distinct attributes. Notably, Hugo appears to be vulnerable to being overshadowed, which could be attributed to revenue disparities between Hugo and Boss. There are two options, or Hugo Boss highlights the Hugo brand since it is the brand that is targeting the

younger desired consumer or they assume a merge of the two brands and then target a younger consumer with the one brand Hugo Boss.

If considering the first option, an important aspect of brand differentiation is the brand's online presence, particularly in its website. While physical stores effectively separate Hugo and Boss, the website currently presents both brands together, with no dynamic features that distinguish them. To improve brand visibility and customer clarity, the website structure must be optimised, ensuring a clear separation between Hugo and Boss, mirroring the distinctions maintained in physical stores. A dedicated online space for each brand, similar to the gender-based segmentation on the website, should be established, reinforcing Hugo and Boss' individuality. A comprehensive SEO (Search Engine Optimisation) strategy is recommended with a focus on increasing the visibility of the Hugo brand. Hugo is currently not prominently displayed as the first result when searched online, both on search engines such as Google and on social media platforms. It is critical to launch a strategic initiative to increase Hugo's online visibility, both in search engine rankings and social media searches. This proactive SEO strategy would ensure that Hugo is easily and clearly identified when searched, contributing to a stronger and more distinct brand presence.

#### **4.2. Communication Strategies**

Another key recommendation based on the responses to the presented campaigns during the interviews is to create a communication marketing strategy tailored to more effectively resonate with younger generations. Given that Generation Z is bombarded with advertisements and social media campaigns, and thus has a reduced responsiveness to traditional marketing approaches, it is critical to craft messaging that aligns with their values. Generation Z, according to McKinsey, is particularly discerning and values authenticity in brand communication, seeking meaningful connections within their communities maybe by

utilising micro-influencers as a means of communication, allowing for a more subtle and nuanced approach in conveying the brand's products. Micro-influencers, with their smaller but more engaged audiences, can offer a discreet and authentic channel for product promotion.

(McKinsey, 2020)

While Hugo Boss, the group, currently has high brand awareness and a relatively positive and strong image, which is largely consistent with Boss's brand identity, there is an opportunity to leverage on this strength. Instead of simply attempting to project a modern, young, and cool aesthetic, the brand's communication strategy for Hugo, or Hugo Boss as one, should include a more profound and authentic message. According to the research, Generation Z responds more positively to campaigns that have a deeper meaning and resonate with their values. As a result, the emphasis should shift away from surface-level aesthetics and towards communicating authentic messages that foster a genuine connection with the target audience.

Additionally, given the widespread perception of Hugo Boss as a quality brand, as highlighted in the interviews where quality emerged as a key determinant for purchasing higher-priced items, the brand should strategically align with these expectations. Emphasising and delivering on quality commitments can help to strengthen the positive brand image and cater to the discerning tastes of Generation Z consumers.

Overall, the recommendation advocates for a communication marketing strategy that goes beyond aesthetics, leveraging authentic messaging that resonates with the Generation Z. Hugo Boss can cultivate a deeper and more meaningful connection with the younger consumer by leveraging the established brand awareness, positive image, and association with quality.

#### **4.3. Keep up the promise “We love fashion, we change fashion”**

The final suggestion has a more creative approach and aligns with Generation Z's appreciation for uniqueness, originality, and personal style. Hugo Boss could strategically leverage its

archive pieces from the 1980s and 1990s to tap into this sentiment, drawing inspiration from the aesthetic that resonates with the younger generation that aspires to be nostalgic. A notable approach could be to create a unique campaign that evokes the vintage Hugo Boss atmosphere popular in the 1980s and 1990s or has a deeper message to the younger consumer. (Appendix 11)

To emphasise uniqueness and create desire, the brand could launch exclusive capsule collections that have the heritage Hugo Boss personality fostering a nostalgic connection with the consumer. This approach not only aligns with the desire for originality and uniqueness, but it also imbues the brand with a youthful yet meaningful essence. Moreover, this recommendation is consistent with the brand's desire to be a leader in contemporary fashion and innovation, as expressed in their tagline, "we love fashion, we change fashion." It is critical to introduce innovative designs and concepts that go beyond the Boss brand to include Hugo and appeal to a younger demographic. A compelling solution is provided by the proposed capsule vintage or vintage-inspired collections. The brand has the opportunity to redefine its identity by reinterpreting the older, more traditional image associated with Boss in an edgy and youthful manner. This shift has the potential to reshape perceptions, positioning the brand as a trailblazer in apparel innovation, capturing the attention of the younger generation.

## **5. Limitations and further investigation**

While this research has provided useful insights into the premium fashion market, it is important to recognise its limitations. To begin, because the research was exploratory in nature, it identified critical industry concerns; however, the lack of quantitative data makes it difficult to precisely estimate the scope of these concerns and predict their impact on the industry and category. Further research using quantitative techniques is recommended to

reach more accurate conclusions on these topics. Furthermore, the study purposefully targeted the Generation Z demographic, conducted a small number of interviews, and primarily included respondents based in Portugal. As a result, it is recommended that future research expand on this study by including a larger and more diverse sample, both in terms of geographical locations and gender. This approach will result in more robust conclusions, allowing for a more thorough investigation of potential cultural differences that may influence customer perceptions and relationships with purchasing behaviours. While the semi-structured framework used for primary data collection was useful, it may not have captured the depth of insights obtained through in-depth interviews or focus groups. Incorporating these methods into future research could yield more details, diverse perspectives, and nuanced customer perspectives. Additionally, the interviews were conducted online, which could limit rapport-building and nonverbal communication. Future research could address these issues by conducting in-person interviews, potentially yielding more valuable data.

Finally, while the study sheds light on the premium fashion industry, researchers must be aware of its limitations in order to gain a thorough understanding. Using quantitative methods with a larger, more diverse sample and a broader geographic focus will allow for a more comprehensive examination of the factors influencing consumer behaviour in the premium fashion product market, providing clearer implications for industry stakeholders.

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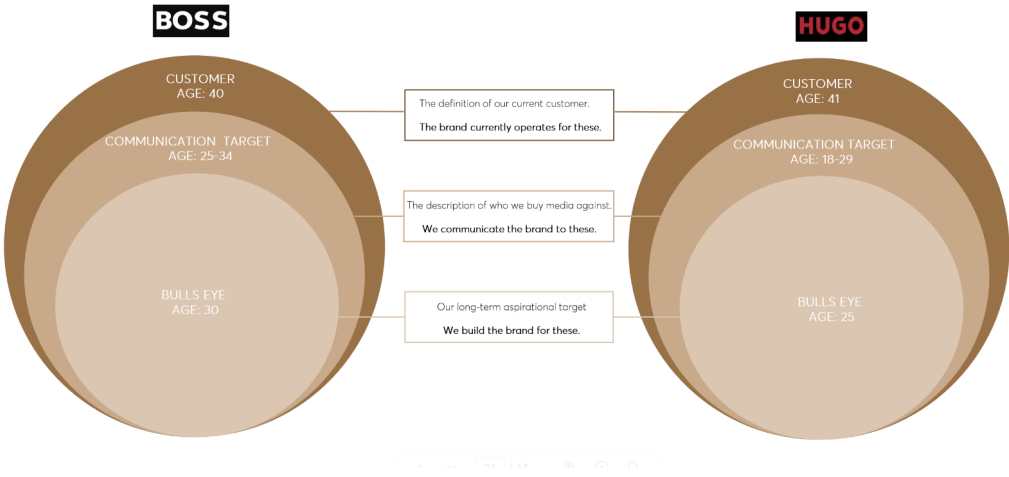
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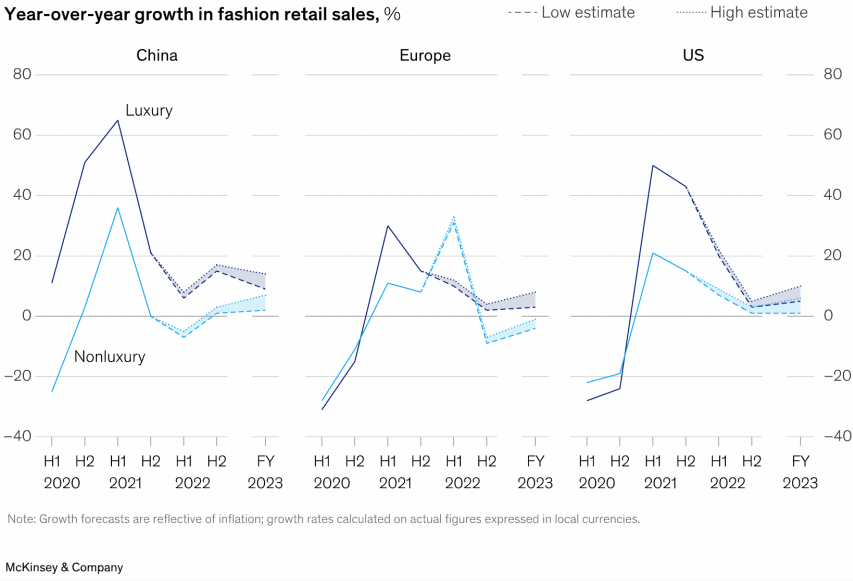
# Appendix

## Appendix 1.



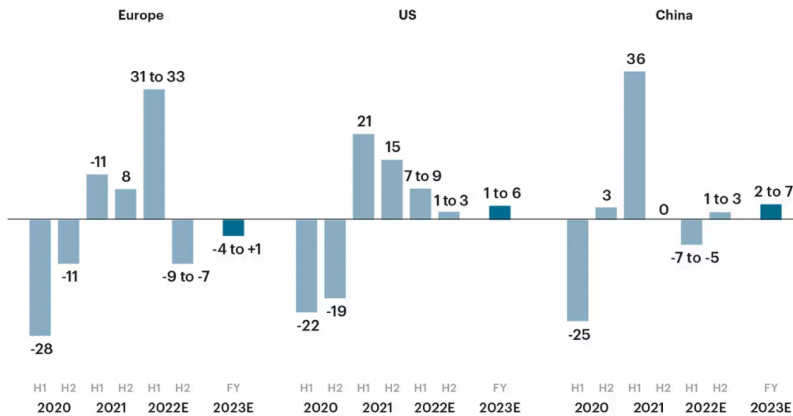
## Appendix 2

**Beyond the differences between the luxury sector and other fashion segments, regional differences will be pronounced in 2023.**



## Fashion sales in 2023 are expected to grow in the US and China

Non-luxury fashion retail sales, year-on-year growth, 2020-2023E,  
%



Note: Growth forecasts reflective of inflation; growth rates calculated on actuals expressed in local currencies

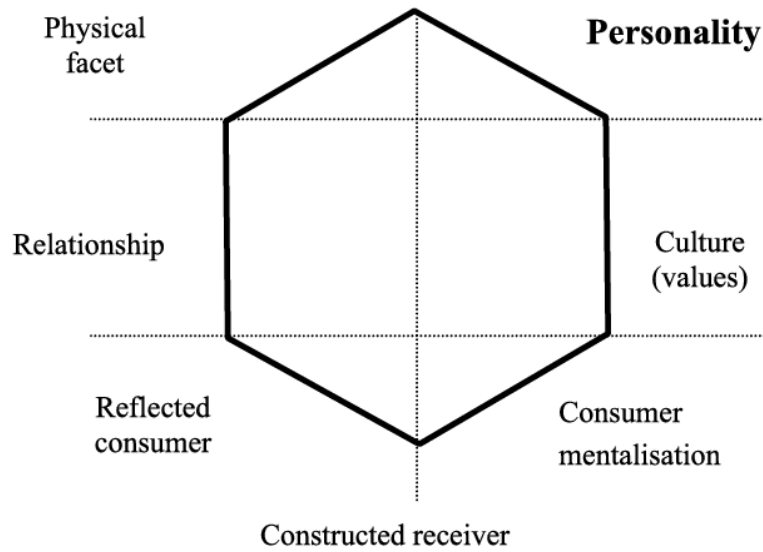
Source: McKinsey Fashion Forecasts; McKinsey analysis; expert interviews



### 1.3. Challenges

#### SHRINKING OF THE PREMIUM MARKET

- Challenge #1: Stock is a killer
- Challenge #2: Small potential to grow
- Surviving in the middle market requires strong differentiating factors to justify premium on tag price
  - Key success factor #1: Strong identity
  - Key success factor #2: Specific know-how or technique
  - Key success factor #3: Explore specific local perceptions



### Pre-interview Questionnaire

The goal is to interview European consumers that belong to Gen Z to understand what their relationship with premium brands is, how their purchase behaviour is and what makes them choose a brand and not another.

**F1. In which age gap do you fit? (Filter Gen Z)**

- 0-12
- 13-26
- 27-42
- 43-58
- 58-73
- more than 74

**F2. Where do you live? (Filter consumers that live in Europe)**

- (Europe countries)
- ...
- others

**F3. What is your current status? (Understand if people are currently working)**

- Employed
- Freelance
- Worker student
- Student
- Unemployed

**F4. What brands have you purchased before? (Filter potential customers of Hugo Boss and understand if the respondent knows that Hugo and Boss are different brands)**

- Giorgio Armani
- Hugo
- Lacoste
- Burberry
- Boss
- Zara (People who only bought Zara were also filtered)
- Ralph Lauren
- Scotch and Soda
- Tommy Hilfiger
- Maje
- Calvin Klein

**F5. Are you willing to attend an interview following this survey?**

**F6. If yes, could you indicate your email for further contact?**

Appendix 7 - 10 brands showed during the interview



Appendix 8 - Sample description

<b>Gender</b>	<b>Age</b>	<b>Nationality/Residency</b>	<b>Occupation</b>
<b>Male</b>	22	Cuban American, living in Venice Italy	Worker student
<b>Male</b>	24	Portuguese and French, living in Lisbon	Worker student
<b>Male</b>	17	Portuguese living in Lisbon	Student
<b>Male</b>	19	Portuguese, Living in Lisbon	Student
<b>Female</b>	26	Portuguese and german, living in Berlin	Worker student
<b>Female</b>	22	Portuguese, Living in Lisbon	Student
<b>Male</b>	24	Portuguese, living in Prague	Full time worker
<b>Female</b>	22	Portuguese and American, living in Lisbon	Worker student
<b>Male</b>	25	Italian, living in Stuttgart	Full time worker
<b>Male</b>	22	Portuguese, Living in Lisbon	Worker student
<b>Female</b>	25	Belgian, living in Paris	Full time worker
<b>Female</b>	24	Portuguese, living in Lisbon	Full time worker
<b>Male</b>	24	Portuguese, living in Lisbon	Worker student
<b>Male</b>	24	Portuguese, living in Lisbon	Unemployed
<b>Male</b>	25	Portuguese, living in Lisbon	Freelancer
<b>Female</b>	21	Portuguese, living in Lisbon	Student
<b>Female</b>	26	Moldavian and Portuguese, living in Lisbon	Full time worker
<b>Female</b>	24	Portuguese, living in Lisbon	Freelancer
<b>Female</b>	26	German, living in Stuttgart	Worker student
<b>Female</b>	19	Portuguese, living in Porto	Full time worker
<b>Female</b>	20	Portuguese, living in Amsterdam	Student

## Interview Questionnaire

### Warm-up

Good morning / afternoon / evening. My name is Eva Fisahn and I am currently a student of International Management at NOVA School of Business and Economics. In this course, we are conducting a research related to premium fashion brands.

For this purpose, I would like to interview you for approximately 45 to 60 minutes, by means of a semi-structured interview, which means that I will ask you several questions, to which there are not right, or wrong answers and you are free to say whatever comes to your mind on the subject.

For analyzing our interviews later, I would like to record our conversation – would that be, ok? It will remain anonymous, and you will not be contacted further past this interview, in compliance with the General Data Protection Regulation (GDPR), of May 2018.

### SECTION 1 – Opening Question (Define customer decision journey)

1. **Can you remember the last time you purchased a clothing piece from a price point between 80€ and above? Guide me through that process.**
2. **What are you favourite fashion brands and why?**
3. **From this list which fashion brands do you recognise? And which brands have you purchased before?** (Document with pictures from different brands)
  - Topics to take from this question: Take the “why” those products information already – what factors are considered? Price (including promotion factor), quality, brand purpose, trend, timelessness, etc.
4. **What makes you buy one brand and not another?**

Topics to take from this question:

- Try to lead the person to talk about her connection with the brand also, price, experience, quality, popularity, purpose...
- Comparison with other brands
- Importance of purpose– especially in the social-environmental situation that we are going through nowadays.

### SECTION 2 – Conducting Questions (Define personas)

**1. What does a typical day or week look like for you? For example, can you tell me about yesterday?**

- Topics to take from this question:
- What type of person are we interviewing
- Do they talk more about her routine related to work, family, friends, herself?
- How is fashion included in this routine? – try to take it from them if not mentioned

**SECTION 3 – Conducting Questions** (Define Gen Z as a consumer)

**1. What factors are most important to you when making a fashion purchase?**

- Topics to take from this question:
- How do they feel when purchasing these products?
- What products do they mention, and which brands do they relate with?
- How do they become aware of the existence of those products? – was through recommendation from family and friends? Social media? Do they search for it? how is it?
- What channels do they use? Online shop, physical, department shops, Omnichannel?
- Understand the importance of purpose, social and environmental responsibility

**2. Do you follow fashion brands on social media? Or how do you get to know fashion brands?**

**SECTION 4 – Conducting Questions** (Define understanding about Hugo Boss)

**1. Tell me what do you know about Hugo Boss?**

- Topics to take from this question:
- Understand how aware the respondent is about the fact that Hugo and Boss are different brands and about their differences.
- Introduce the brand and understand what are their opinions and perspectives on the brands, where they know them from etc.
- What products are mentioned, who buys them, etc.

**2. Have you ever purchased any of their products?**

**SECTION 3 – PROJECTIVE TECHNIQUE** (Only do this part to people who

Projective Technique is conducted.

3. **How would you characterise these fashion brands if they were a person?** Note: During this exercise is important to question regarding Hugo and Boss if they knew the difference between both brands and Hugo Boss as a whole and another premium brand if the respondent didn't know the difference between the brands.

Projective Technique:

- a. If Boss/Other brand was a person, what kind of person in a friend group would they be?
  - b. If Hugo/Hugo Boss was a person, what kind of person in a friend group would they be?
- Topics to take from this question:
  - In the interviewer point of view how is the identity of the brand? Is it the confident friend? (This characteristic might be hidden in words like: the leader, the strong friend, and others).
  - How does the brand differentiate itself.
  - The result – feelings wise – of using products of that brand.

#### **SECTION 4 – Campaigns**

The interviewer must show campaigns 1 and 2 followed by the generic questions – the campaigns do not need to be shown in their totality. During the interviews other campaigns should also be added to have a more diverse range of feedback from different types of campaigns and brands. If the respondent doesn't know about the difference between Hugo and Boss now is the time to tell them a bit.

Campaign 1

Campaign 2

2. How do you feel about the two campaigns that I just show you?
  - Topics to take from this question:
  - Which one would you say its from Hugo and which one from Boss?
  - How do the campaigns make the interviewer feel?
  - Do you identify with the campaigns? Would it make you want to feel attracted to the brands?
  - Relation between fashion and purpose

3. Are you aware of campaigns done by both brands?

### **SECTION 5 – DEMOGRAPHIC INFORMATIONS**

**Note:** All the other questions are already disclosed in the pre-interview form (Nationality, Gender, Age, Education and Occupation).

4. How old are you? 25
5. What is your nationality? And where do you live currently?
6. In what area do you work?

### **Wrap - up**

Alright! Coming to the end of the interview we would just like to first and foremost thank you for your time.

Do you have any specific feedback you would like to give us?

Thank you so much and have a great day!

Appendix 10 - Brand Image BOF study

BOF released a study done with a new AI tool called Brand Magic that compares the brand identity, created by the brand with the brand image that is given by the consumer. The way it works is it “assesses the ideals and values that a brand sends in its marketing as exemplified across Carl Jung’s 12 archetypes” and “(...)then analyses if and how customers receive those ideals and values based on their social media posts about that brand.”

According to this study Boss is at the 3rd position (Appendix 3 and 4) on the most aligned brands with their customer:

“Boss (Score = 92) is amid a significant turnaround being led by CEO Daniel Grieder. He has clarified the positioning of its two brands, Boss and Hugo, while leaning into a successful influencer-led strategy to drive awareness. The company raised its 2023 guidance for the second time in August.” (BOF, 2023)

## HUGO BOSS

# Recommendations

**KEEP THE PROMISE**

**"WE LOVE FASHION, WE CHANGE FASHION"**

