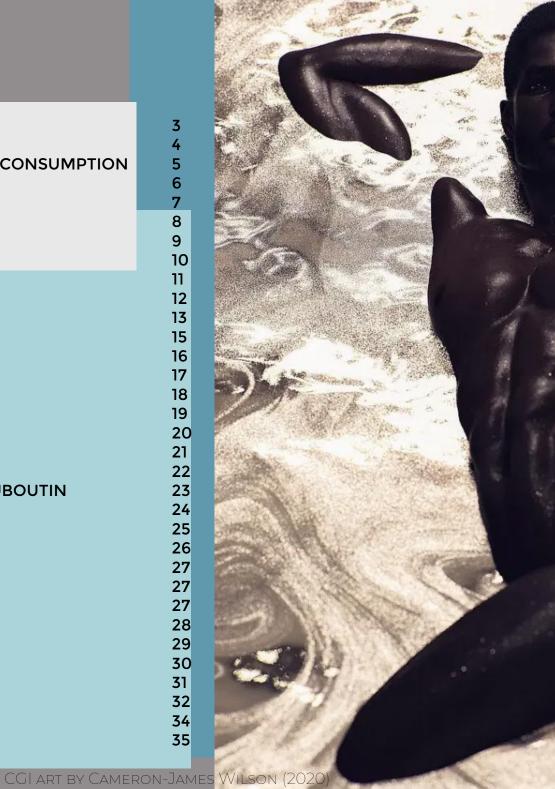


TABLE OF CONTENTS

EXECUTIVE SUMMARY	3
INTRODUCTION	4
MACRO TREND: CYPHER- CRACKING THE CODE OF DIGITAL CONSUMPTION	5 6
MACRO TREND CONSUMER ANALYSIS	7
KEY TREND DRIVERS	
MICRO TREND: COMUPTER GENERATED IDIVIDUALISM	8
GUCCIFEST	9
CGI FABRIC	10
BRIA	11
DIGITAL INFLUENCER	12
VIRTUAL FASHION COLLECTION	13
MICRO TREND: DIGITAL VISIONARIES	15
ANGEL CHEN	16
HELIOT EMIL	17
IN-CAMERA VFX	18
VIRGIL ABLOH	19
MICRO TREND: GAMIFICATION	20
THE SIMS X MOSCHINO	21
FORTNITE X NIKE AIR JORDANS	22
LEAGUE OF LEGENDS X LOUIS VUITTON ZEPETO X LOUBOUTIN	23
ZEPETO X LOUBOUTIN	24
BALENCIAGA'S VIDEO GAME	25
MICRO TREND: DO IT YOURSELF / LIVE	26
CHIPOTLE	27
BON APPETIT	27
ORIGINS	27
JACQUEMUS SUMMER 2020 DIGITAL AD CAMPAIGN	28
CHRISTINA SEEWALD FW20	29
FUTURE: DEMOCRATIZATION OF VIRTUAL ASSETS	30
CREATIVE PROPOSAL: VIRTUAL REALM	31
REFERENCES	32
VISUAL REFERENCES	34
BIBLIOGRAPHY	35





EXECUTIVE SUMMARY

• Brands are switching to digital fashion to reduce consumption and waste.

CLIMATE CHANGE HAS PUT "ECO-ANXIETY" ON CONSUMERS, LEADING TO DIGITAL CONSUMPTION WITH ZERO WASTE.

• Digital fashion shows are still significantly less engaging on social media compared to the traditional catwalk.

With uncertainty for the future, brands are increasing their

ENGAGEMENT WITH CGI, VIDEO GAMES AND INNOVATIVE DIGITAL ADVERTISEMENT.

• **M**AYOR LUXURY BRANDS STEPPING AWAY FROM THE TRADITIONAL FASHION CALENDAR

INTERNATIONAL LOCKDOWNS FORCED BRANDS TO MARKET PRODUCTS DIGITALLY AND WITH LITTLE EQUIPMENT- CREATING A NEW DIY HOME STYLE.

• THROUGH DIGITALIZATION AND SOCIAL MEDIA, SMALLER BRANDS MIGHT NOW HAVE A CHANCE TO BE RECOGNIZED.

Brands are investing in digital fashion.

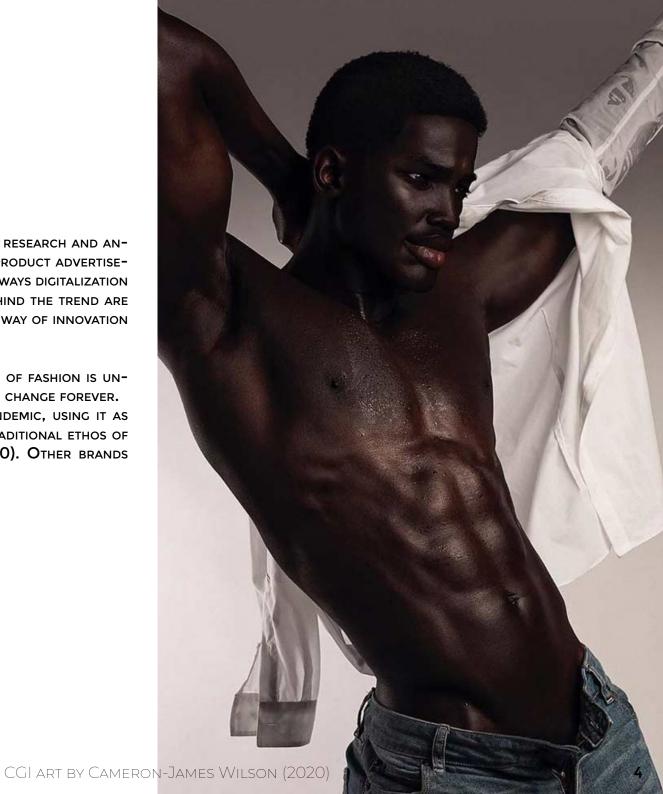
MULTICHANNEL CAMPAIGN STRATEGIES ARE STARTING TO INCLUDE INTER-ACTIVE DIGITAL AND VIRTUAL COMPONENTS.

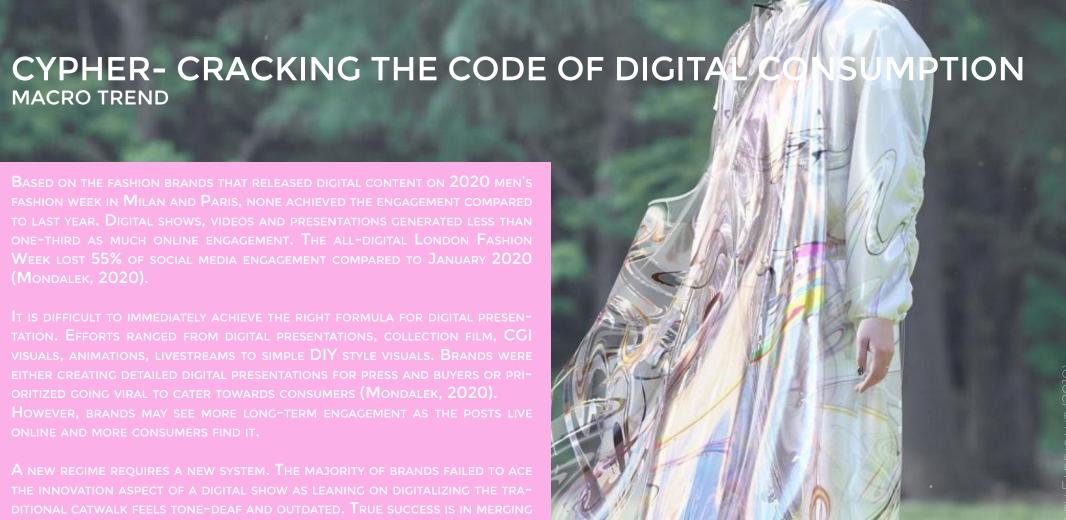
INTRODUCTION

The primary aim of this report is to summarize conducted research and analyze the current trends regarding the digitalization of product advertisement. With supporting examples, the report presents new ways digitalization tailored to the current consumer. Drivers of change behind the trend are provided and applied to form a design solution, leading a way of innovation until 2023.

WITH THE RISE OF COVID-19 SELF- QUARANTINING, THE FUTURE OF FASHION IS UNCERTAIN. THE WAY FASHION IS PRESENTED AND CONSUMED COULD CHANGE FOREVER.

MANY DESIGNERS HAVE ATTEMPTED TO WORK AROUND THE PANDEMIC, USING IT AS A SOURCE OF INSPIRATION WHILE STILL TRYING TO RETAIN THE TRADITIONAL ETHOS OF FASHION CAMPAIGNS AND FASHION SHOWS (BAKUMENKO, 2020). OTHER BRANDS PUSHED TOWARDS SOMETHING COMPLETELY NEW.





A NEW REGIME REQUIRES A NEW SYSTEM. THE MAJORITY OF BRANDS FAILED TO ACT THE INNOVATION ASPECT OF A DIGITAL SHOW AS LEANING ON DIGITALIZING THE TRADITIONAL CATWALK FEELS TONE-DEAF AND OUTDATED. TRUE SUCCESS IS IN MERGING THE TWO WORLDS TO CREATE IMPACTFUL, SHARE-WORTHY MOMENTS BOTH ON AND OFFLINE. BRANDS NEED TO CONSIDER THEIR WAYS OF PACKAGING AND DISTRIBUTING THEIR DIGITAL ASSETS, TO PROVIDE THE MEDIA AND INFLUENCERS WITH THE RIGHT CONTENT TO REACH THE RIGHT CONSUMER. THE FOCUS SHOULD BE ON AMPLIFICATION RATHER THAN DIGITIZATION (MONDALEK, 2020).

The general shift towards digital solutions will drive the use of digital fashion from the design and production phase, right through to purchasing and wearing in digital realms, including on social media and in games (Roberts-Islam, 2019).

MACRO TREND CONSUMER ANALYSIS

Digital presentation is predominantly targeted to Generation Z for their tech-savvy skills and digital dexterity towards social media and gaming (Estrella and Reach, 2020).

AGED 10 TO 23

Additionally, Generation Y are also known as digital natives, however Generation Z is more comfortable within the field of digital innovation explored in this report (Iberdrola, 2020).

AGED 24 TO 39

Interests:
Social Media (Instagram, Tiktok)
Fashion
Aesthetics
Environmentalism
Sustainability
Re- and upcycling
Zero waste
Politics
Technology

KEY TREND DRIVERS

POLITICAL

COVID-19 WORLDWIDE NATIONAL LOCKDOWN RESTRICTIONS FORBID PUBLIC GATHERINGS (UK GOVERNMENT, 2020).

US ELECTION

MANY COMPANIES STORES ARE IN CITY CENTER LO-CATIONS; POTENTIAL TERRORISM THREATS HAVE AF-FECTED TOURISM AND FOOTFALL IN SHOPPING MALLS.

ECONOMIC

COVID-19 LOCKDOWN FORCES MANY BUSINESS TO ADAPT OR CLOSE (Hui, 2020).

Companies are preparing for Brexit Laws. Main issues to be expected with the supply chain, custom tariffs and workforce (Overview, 2020).

Change in consumer spending habit changes increase pressure on certain goods whilst others are in decline.

MANUFACTURING SITES IN THE UK ARE EXPENSIVE TO RUN.

SOCIAL

SUPERIOR OF A PLANTAGE OF A PERSON OF A PE

People are experiencing eco-anxiety caused by the climate change, pollution and over-consumption. BLACK LIVES MATTER MOVEMENT RESULTED IN MORE CULTURAL DIVERSITY IN MEDIA.

CURRENT CLOTHING RANGE DOES NOT CATER TO ALL AGES, BODY SHAPE AND GENDER.

REWIRING FASHION IS A GROUP OF CEOS AND RETAIL EXECUTIVES FROM AROUND THE WORLD WHO CHALLENGE FASHION TO BE SLOWER TO FIGHT OVER CONSUMPTION AND POLLUTION (REWIRING FASHION, N.D.).

DIGITAL IS CHANGING FASHION WEEK. DESIGNERS ARE QUESTIONING WHETHER IT MAKES SENSE TO SHOW SO OFTEN AT FASHION WEEKS IN A DIGITAL WORLD (GOH, 2020).

TECHNOLOGICAL

3D DIGITAL DESIGN AND AUGMENTED REALITY TO REDUCE TEXTILE WASTE IN THE FASHION INDUSTRY AND CARBON EMISSIONS GENERATED IN THE PRE-CONSUMER PHASE OF THE FASHION INDUSTRY. £5-7 BILLION IS SPENT ON PHYSICAL SAMPLING IN THE APPAREL INDUSTRY EACH YEAR. THESE SAMPLES OFTEN END UP BEING BURNED OR THROWN IN LANDFILL (ROBERTS-ISLAM, 2019).

OPTITEX SOFTWARE SOLUTIONS INCLUDE 2D DESIGN AND 3D VISUALIZATION PLATFORMS THAT COVER THE

ENTIRE SUPPLY CHAIN, CREATE EFFICIENT WORKFLOWS, AND SHORTEN TIME TO MARKET. OPTITEX PROVIDES A DIGITAL CLOUD (O/CLOUD), WHICH LETS THE USER DISPLAY ALL STYLES AND COLORWAYS BEFORE PREPARING THE FIRST PHYSICAL PROTOTYPE AND COMMUNICATE WITH THEIR TEAMS AND COLLEAGUES IN A CENTRALIZED LOCATION (O/CLOUD, 2020).

3D DIGITAL DESIGN

- A LUXURY BRAND WORKING REDUCED THE AVERAGE TIME TO MARKET PER STYLE FROM 3 MONTHS TO 2 WEEKS (ROBERTS-ISLAM, 2019).
- By Going Digital, Adidas was able to eliminate close to 1.5 million physical samples between 2010 and 2013 (Roberts-Islam, 2019).

A PREFERENCE FOR ONLINE SHOPPING IS AN INCREAS-INGLY POPULAR TREND BY OLDER POPULATIONS.

Data storage confidentiality and consumer rights.

Need to improve technology for analytics and buying intelligence.

NHS RANSOMWARE: RISE IN CYBERCRIME RISK TO DATA PROTECTION AND OPERATIONAL STABILITY.

⊘⊘⊘⊘

3D is used in many industries such as food and cars. Fashion and CGI, however, is a relatively new concept. CGI offers freedom and an advantage in terms of creating images that would be much harder to do in real life when photographers are only relying on a camera. Many recent CGI fashion visuals have been born out of government-imposed lockdowns as experimentation with digital imagery is gaining momentum, according to image-maker Nick Knight: "We are at the tip of the iceberg" (Milner, 2020).

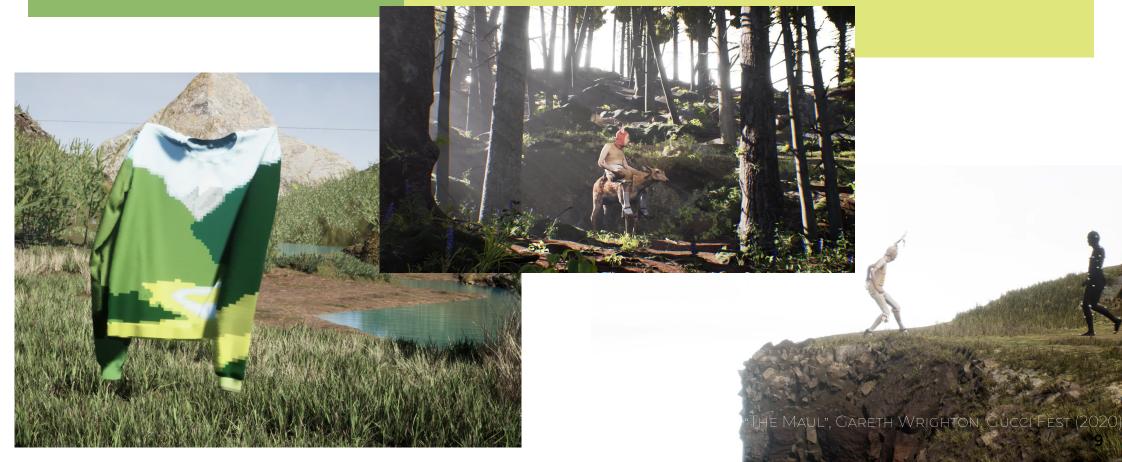


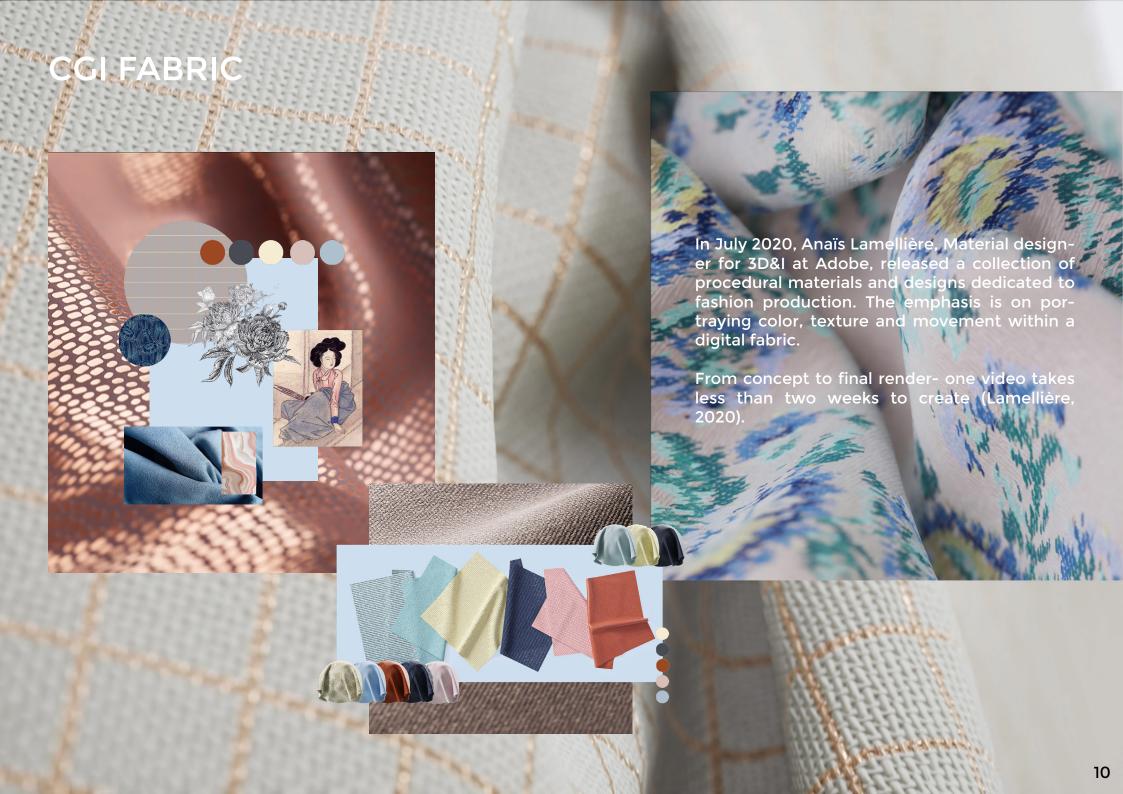
GUCCIFEST

In May 2020, Gucci's Alessandro Michele announced that he would abandon the tradition of seasonalities. As a substitute GucciFest was launched as a series of short films. GucciFest is positioning Michele and Gucci at the centre of the cultural conversation (Baskin, 2020).

LONDON-BASED DESIGNER GARETH WRIGHTON DESIGNED A TRAILER FOR AN IMAGINATIVE VIDEO GAME WITH EXISTENTIAL CHARACTERS. IT IS A VIRTUAL POST-APOCALYPTIC DYSTOPIAN TAKE ON THE COMMERCIAL MECCA OF AMERICA (WRIGHTON, 2020).







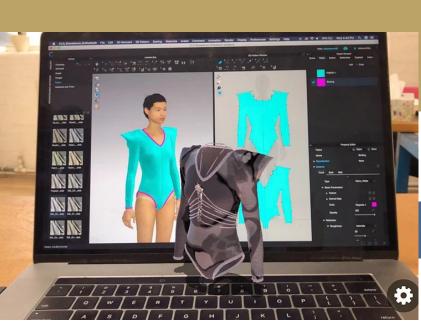
BRIA

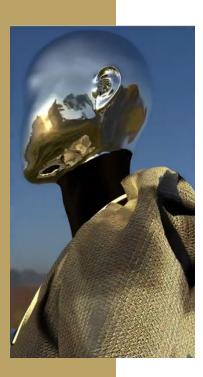
BRIA REIMAGINES THE FASHION DESIGN PROCESS BY TURNING MANUAL GARMENT CREATION INTO A DIGITIZED PROCESS. THE USE OF 3D DESIGN AND RENDERING SOFTWARES ELIMINATE THE NEED FOR PHYSICAL SAMPLES AND FITTINGS, YET STILL ALLOWS POTENTIAL PHYSICAL MANUFACTURING (AUGMENTED FASHION, 2020).







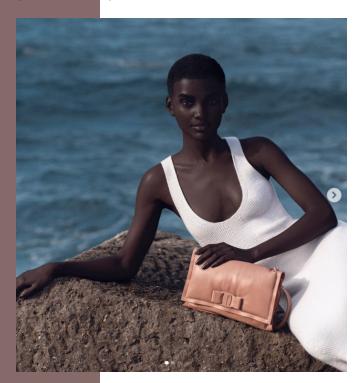




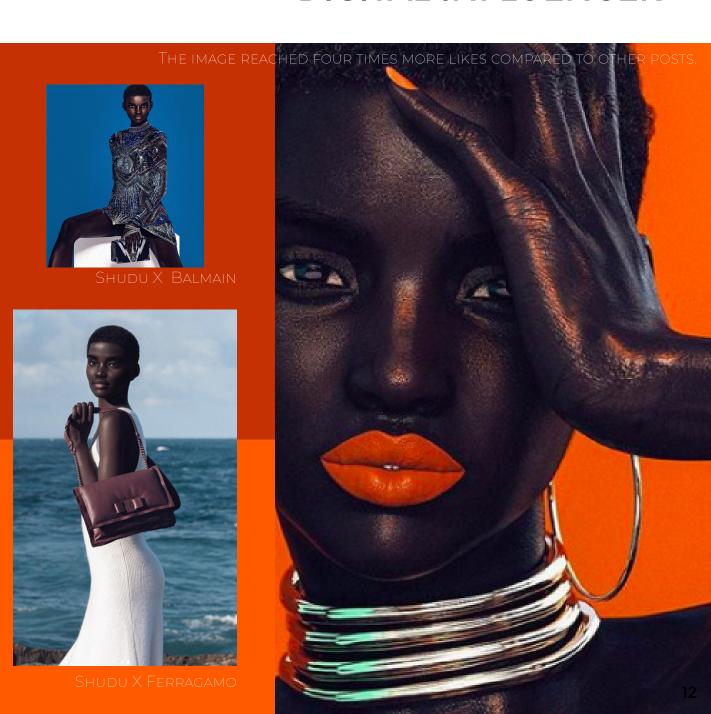
IN 2017, PHOTOGRAPHER CAMERON JAMES-WILSON CREATED A FIRST EVER DIGITAL SUPERMODEL. A SINGLE IMAGE TAKES ABOUT TWO WEEKS OF PLANNING AND THREE FULL DAYS WORK. THE MODEL NAMED SHUDU GAINED COVERAGE WHEN FENTY SHARED AN IMAGE OF HER WEARING THE BRAND'S LIPSTICK (SHUDU, THE FIRST DIGITAL SUPERMODEL, 2020).

ALTHOUGH WITH A THE LARGE FOLLOWING, DIGITAL MODELS ARE CURRENTLY TAKEN AS ART PIECES. THIS MIGHT CHANGE AS MAJOR FASHION BRANDS ARE STARTING TO CAST DIGITAL MODELS IN CAMPAIGNS (SHUDU, THE FIRST DIGITAL SUPERMODEL, 2020).

OLIVIER ROUSTEING CAST THREE CGI MODELS FOR HIS LATEST BALMAIN PRE-FALL 2018 CAMPAIGN (WEISS, 2018).



DIGITAL INFLUENCER





VIRTUAL FASHION COLLECTION

GCDS SS21

IN THE VIDEO RELEASED ON THEIR WEBSITE, GCDS.IT, GCDS TAKES THE VIEWER ON A JOURNEY TO AN ALTERNATE UNIVERSE WITH ANIMATED MODELS WALKING DOWN A RUNWAY. GCDS COLLABORATED WITH DUA LIPA, RAISA FLOWERS, AWENG ADE-CHUOL, AND A FEW MORE PUBLIC FIGURES WHO CAN BE SEEN IN THE FRONT ROW OF THE VIRTUAL SHOW.

THE VISUALS ARE HIGHLY CREATIVE AND EXPRESSIVE. THOUGH THE COLLECTION IS REMINISCENT TO WHAT THE BRAND USUALLY OFFERS, IT IS AN ENTIRELY CAPTIVATING AND BOUNDARY-PUSHING SHOW. GCDS SS21 PRESENTS A TRUE REFLECTION OF WHAT'S HAPPENING IN THE WORLD (BAKUMENKO, 2020).





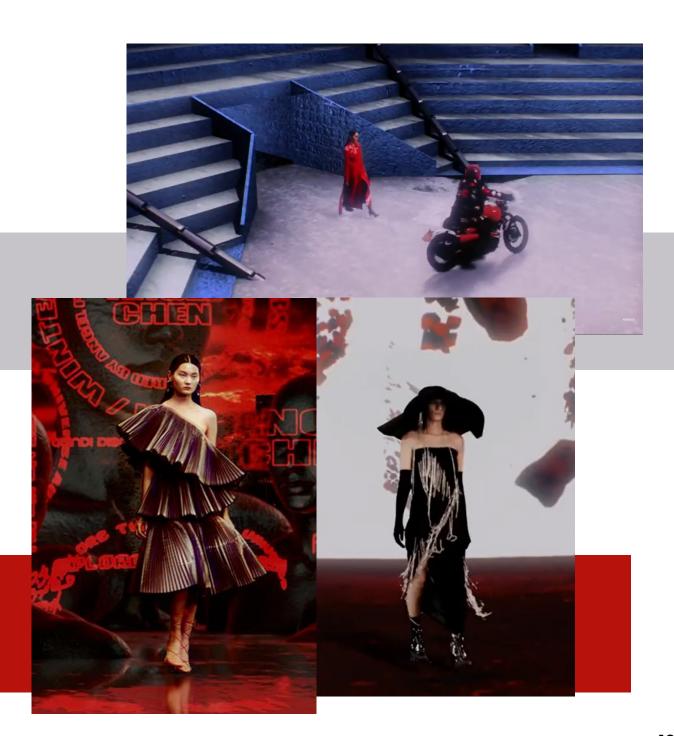
ANGEL CHEN

In April 2020, Shanghai based designer Angel Chen presented her fall 2020 collection virtually on five different platforms including Instagram, Weibo and Douyin.

THE FINAL PRODUCT IS A SIX-MINUTE VIDEO THAT SHOWS HER COLLECTION IN A VARIETY OF DIGITAL ENVIRONMENTS (YOTKA, 2020).

THE MODELS WERE FILMED AGAINST A GREEN SCREEN AND THE VISUAL EFFECTS WERE ADDED WITH POST-PRODUCTION.

THE EXECUTION WAS SUCCESSFUL AS 40,000 WATCHED THE SHOW LIVE ON TMALL AND RETAILERS HAVE PLACED ORDERS AFTER THE STREAM. CHEN BELIEVES A COMBINATION OF BOTH PHYSICAL AND DIGITAL MIGHT BE OPTIMAL FOR DIGITAL PRESENTATIONS (YOTKA, 2020).



HELIOT EMIL

DANISH BRAND HELIOT EMIL IS KNOWN FOR THEIR DIGITAL RUNWAY EXPERIENCE. THE FW20 PRESENTATION TOOK PLACE IN THE MIDST OF THE COVID-19 CRISIS.

The viewer is in centre of the show in a 360-degree space, being able to physically explore the environment. The label worked with a 360-degree camera and took one full day to produce. Fewer models were required comparing to a physical runway.



IN-CAMERA VFX

In-Camera VFX means shooting real-time visual effects during a live action film shoot. The technique relies on a mixture of LED lighting, live camera tracking to create seamless visual realms between foreground actors and virtual backgrounds. Its replacing green- and blue screens and decreasing the time required to produce VFX visuals (In-Camera VFX Overview, 2020).

THE MANDALORIAN (2019) IS ONE OF THE FIRST MAJOR PRODUCTIONS TO CHOOSE LED WALLS OVER GREEN SCREENS (BLAKE, 2020).



Inside the volume, The Mandalorian (2019)



THE MANDALORIAN (2019)





In-camera VFX within a LED volume

VIRGIL ABLOH

On July 10th, 2020, Virgil Abloh showcases his men's \$\$21 collection in "The Adventures of Zoooom with Friends", a virtual animation presents his new collection "Message in a Bottle". A colorful crew of animated characters is a nod to Virgil Abloh's ongoing theme of Boyhood (The Adventures of Zoooom with Friends by Virgil Abloh for Louis Vuitton, 2020).

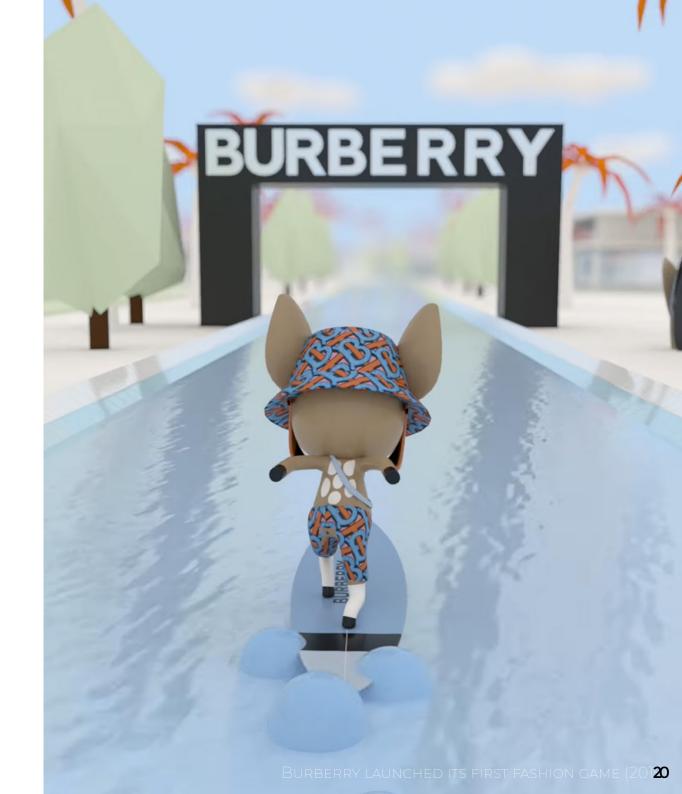


LOUIS VUITTON MEN'S SS21 CAMPAIGN VISUAL (2020)



GAMIFICATION MICRO TREND

BRANDS ARE COLLABORATING WITH GAMING COMPANIES TO ADVERTISE PRODUCTS TO THE YOUTH. COLLABORATIONS CONSIST OF PHYSICAL COLLECTION PAIRED WITH DIGITAL PRODUCTS THAT CAN BE PURCHASED IN THE GAME.





THE SIMS X MOSCHINO

IN 2019, THE SIMSTM COLLABORATED WITH CREATIVE DIRECTOR JEREMY SCOTT TO PRODUCE A MOSCHINO COLLECTION FOR BOTH REAL LIFE AND IN-GAME. THE PIECES ARE INSPIRED BY THEIR OWN READY-TO-WEAR ITEMS, INCLUDING STYLES FROM PAST COLLECTIONS (MOSCHINO X THE SIMS, 2020).







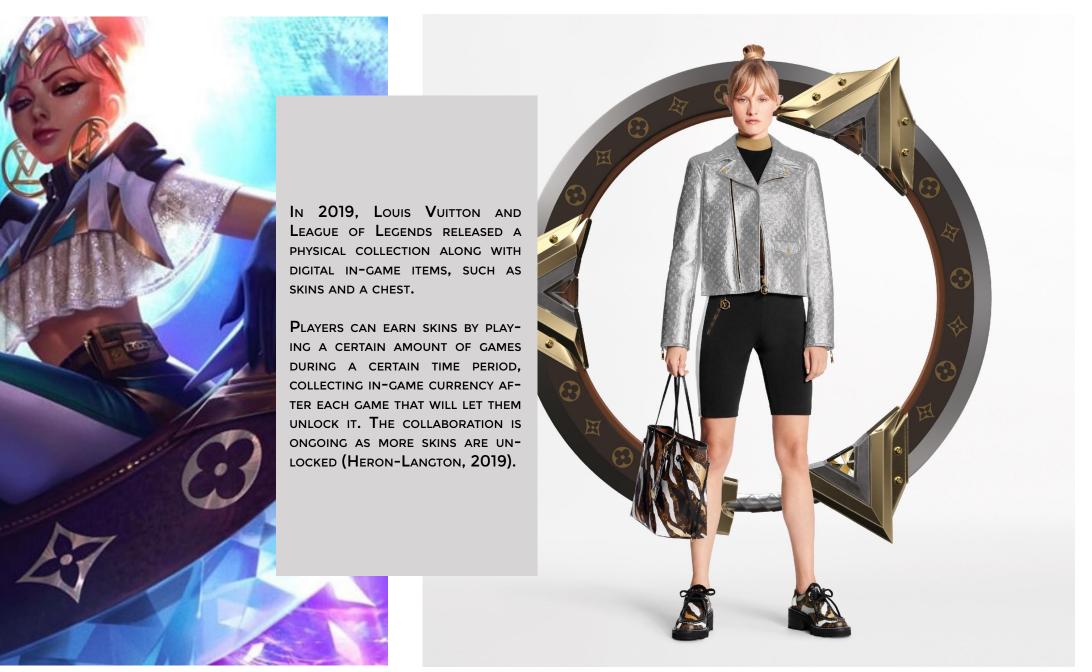
FORTNITE X NIKE AIR JORDANS



IN 2019, FORTNITE COLLABORATED WITH NIKE AIR JORDANS. THE PARTNERSHIP INCLUDES PURCHASABLE IN-GAME BRANDED OUTFITS AND SPECIALS.

As cosmetics are an essential part of in-game digital identity, it's clear that brands have taken note. With three in-game crossovers in two months, it can be assumed that this trend has yet to reach its full potential (Byrne, 2019).

LEAGUE OF LEGENDS X LOUIS VUITTON



ZEPETO X LOUBOUTIN

IN 2018, SOUTH KOREAN APP DEVELOPER SNOW RELEASED ZEPETO. AN AVATAR-BASED SOCIAL NETWORK FOR TEENS WHERE USED CAN CUSTOMIZE THEIR APPEARANCE, OUTFITS AND HOMES (HASKINS, 2018).

IN OCTOBER 2020, CHRISTIAN LOUBOUTIN PRSENTED HIS \$\$21 COLLECTIONS IN-GAME DURING PARIS FASHION WEEK (SOCHA, 2020).





BALENCIAGA'S VIDEO GAME

BALENCIAGA IS DUE TO LAUNCH THEIR AW21 COLLECTION IN AN ORIGINAL VIDEO GAME (AFTERWORLD: THE AGE OF TOMORROW) ON 6TH OF DECEMBER 2020. THE PLATFORM OFFERS PLAYERS TO NAVIGATE THROUGH A VIRTUAL REALM, COMPLETING TASKS AND MEETING CHARACTERS DRESSED IN THE NEW COLLECTION.





AFTERWORLD: THE AGE OF TOMORROW (2020)



DO IT YOURSELF / LIVE MICRO TREND

THE RISE OF LIVE-STREAMING PLATFORMS IS BRINGING OUT MORE INFLUENCER MARKETING ACTIVITY WITHIN THIS CONTENT. THIS INCLUDES PLATFORMS SUCH AS:

- VIDEO GAME STREAMING SITES (TWITCH, MIXER, DLIVE)
- LIVE VIDEO FEEDS ON SOCIAL MEDIA (FACEBOOK LIVE, YOUTUBE LIVE, PERISCOPE)

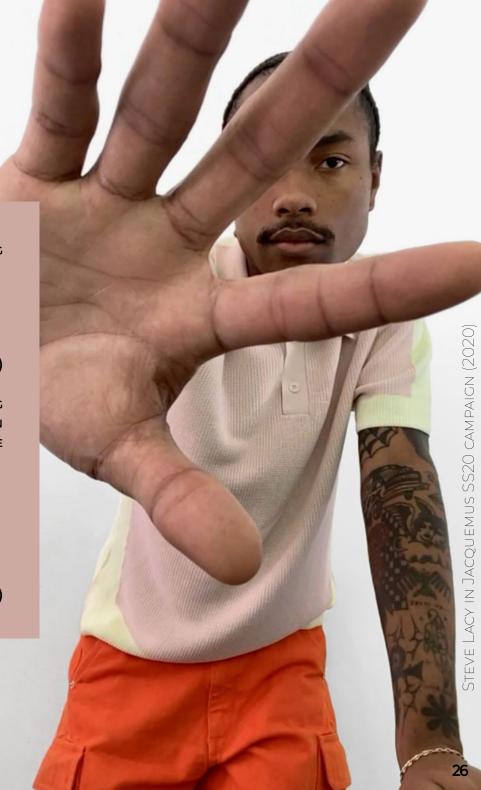
(Go Live - Advertising in Live-streaming, 2020)

WITH 83% OF INSTAGRAM USERS SAY THEY FIND NEW PRODUCTS OR SERVICES BY BROWSING THE PLATFORM (How Instagram Boosts Brands and Drives Sales, 2019), Live video can be an effective tool to highlight products and host events. In fact, 82% of people prefer live video to social posts.

LIVE PLATFORMS IN ORDER OF PREFERENCE:

LIVESTREAM: 45%
FACEBOOK LIVE: 66%
YOUTUBE LIVE:70%

(GOLUM, 2017)



CHIPOTLE

Chipotle is a fast food chain serving Mexican food and the company uses Instagram Live to share recipes (Sheng, 2020).



CHIPOTLE'S EXECUTIVE CHEF SHARES HOW TO MAKE MARGARITAS FOR CINCO DE MAYO (SHENG, 2020).

BON APPETIT

BON APPETIT, A MAGAZINE FOCUSING ON COOKING AND RECIPES, USED INSTAGRAM LIVE AS AN OPPORTUNITY TO HOST A VIRTUAL DINNER PARTY WITH VARIOUS CELEBRITY GUESTS. EACH GUEST PAIRING WAS ALSO CREATIVELY NAMED AFTER COURSES OF A MEAL, FROM APPETIZER TO DIGESTIF (SHENG, 2020).



THE AIM WAS TO CREATE A LAID-BACK, YET ENGAGING ATMOSPHERE AS CHEFS AND GUESTS CARRIED OUT RELAXED AND CASUAL CONVERSATIONS. FOR THOSE WATCHING, THIS COULD'VE BEEN AN IMMERSIVE EXPERIENCE TO FEEL AS IF THEY WERE CHATTING WITH THEIR FRIENDS OVER DINNER (SHENG, 2020)

ORIGINS

ORIGINS IS A COSMETICS COMPANY CREATING PRODUCTS FROM NATURALLY-DERIVED INGREDIENTS. THE COMPANY ALIGNS INSTAGRAM LIVE WITH THEIR BRAND BY SHOWCASING PRODUCTS AND HOSTING CONVERSATIONS ABOUT SKINCARE (SHENG, 2020).



PRODUCTS ARE PRESENTED UP CLOSE TO THE CAMERA. COLLABORATORS SHARE THEIR STORIES, WHICH PROVOKES VIEWERS TO CONSIDER HOW THEY CAN INCORPORATE THE PRODUCT INTO THEIR OWN ROUTINES, WHICH ULTIMATELY PUSHES THEM CLOSER TO PURCHASE (SHENG, 2020).

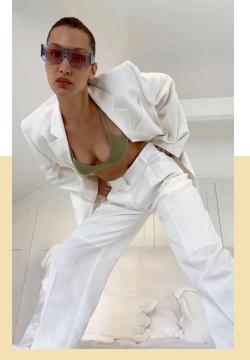
Products online often only show the packaging of the product, therefore revealing what the product itself looks gives a better understanding of how they might expect the product to look and feel (Sheng, 2020).

JACQUEMUS SUMMER 2020 DIGITAL AD CAMPAIGN

BALENCIAGA IS DUE TO LAUNCH THEIR AW21 COLLECTION IN AN ORIGINAL VIDEO GAME (AFTERWORLD: THE AGE OF TOMORROW) ON 6TH OF DECEMBER 2020. THE PLATFORM OFFERS PLAYERS TO NAVIGATE THROUGH A VIRTUAL REALM, COMPLETING TASKS AND MEETING CHARACTERS DRESSED IN THE NEW COLLECTION.

THE COLLECTION WAS PROMOTED BY BELLA HADID IN THE FIRST FASHION CAMPAIGN SHOT OVER FACETIME.

APTLY TITLED "JACQUEMUS AT HOME", THE CAMPAIGN SEES HADID MODELLING PIECES FROM THE SPRING 2020 COLLECTION THAT WAS SHOWN LAST JUNE, IN CELEBRATION OF THE DESIGNER'S 10-YEAR ANNIVERSARY (DAVIS, 2020).







JACQUEMUS BY CREATIVE DIRECTOR SIMON PORTE JACQUEMUS

CHRISTINA SEEWALD FW20





SGITTENSTRATION BY JOSHUA MOWLE (2020)

CREATIVE PROPOSAL: VIRTUAL REALM

THE VIRTUAL MATERIAL PROVIDED BY BRANDS WILL ALLOW THEM TO INTERVENE INTO CUSTOMERS SOCIAL MEDIA. BRANDS ARE GOING TO CREATE VISUAL ASSETS INTO WHICH THE CUSTOMER CAN PLACE THEIR OWN AVATAR. USERS CAN CHANGE LIGHTING, LOCATION AND CREATE IMAGES OR SHORT VIDEOS ENGAGING WITH OTHER USERS THAT CAN BE SHARED ON MULTIPLE PLATFORMS, PRIMARILY INSTAGRAM AND TIKTOK. THE VIRTUAL ASSETS ARE HIGHLY CUSTOMIZABLE AND VISUALLY REALISTIC INCLUDING LOCATIONS (ENVIRONMENT SCANNED WITH A SMARTPHONE CAMERA), LIGHTING (ADJUSTED BY USER), AUDIO, TEXT AND BRANDED APPAREL.





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