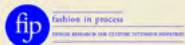


WEMANAGE



data FORMAT 2022/2023

A digital Exploration about data
and its visual representation

**Wemanage Consulting and
FiP Fashion in Process Research Lab
presents:**

data
FORMAT

**An yearly almanac
about data
and its
visual representation**

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A brief introduction to DataFormat

Recognizing the power of social media as a dissemination tool and the importance of Open Knowledge platforms, we have meticulously developed the dataFormat project, aiming to disseminate data-oriented content, shedding light on the transformative aspects of fashion.

Starting on May 2022, we developed a monthly editorial plan, in collaboration with the Fashion in Process Research Lab of the Politecnico di Milano. The Laboratory develops research, applied projects, and knowledge transfer activities with the aim of supporting and promoting the sustainable development of fashion and cultural and creative industries.

During each month, we selected a different artist, who interpreted the data provided to us by the FiP through a completely personal and innovative approach.

The result is a column that epitomizes diversity and uniqueness, in which each component is connected by interlinked themes. We have delved into significant subjects such as sustainability, trends, retail and commerce analysis, branding and marketing, and explored the broader macro-area of Digital Life. Within this realm, we have examined the dynamic intersections of technology and innovation, influencer marketing, and the GenZ's approach to fashion and luxury.

A note by Fashion In Process Research Lab

Fashion in Process (FiP) is a multidisciplinary research laboratory at the Design Department of Politecnico di Milano. FiP focuses on innovation for culture-intensive industries, bridging technologies and humanities, through a design-driven approach.


The Laboratory develops research, applied projects, and knowledge transfer activities with the aim of supporting and promoting the sustainable development of fashion and cultural and creative industries.

Given that social media are a vehicle for spreading content and that dissemination on Open Knowledge platforms is part of the University's Third Mission, the DataFormat project has been developed according to a monthly editorial plan with the aim of disseminating data-oriented contents on topics that highlight aspects of change related to fashion. Contents and data intersect FiP's research scapes: from sustainability to the relationship between fashion, technology, and innovation, from digital life to luxury and retail.

A curatorial memo

Among the glossary of new terms we invented to better understand the world that surrounds us in the last, let's say, ten to twenty years (I'm talking about words like anthropocene, goblin-mode, accelerationism, et cetera), one term struck me the very first time I read it. It's something called hyper-object, which stands for "objects or concepts that are too big for our brain to picture". A common example of it is pollution, or global warming – and the obvious consequence is the very same fact that we don't know how to handle it.

I've always hated infographics as a tool to better understand complex data or information that we need to visualize in order to comprehend. They leave no space for imagination, which is a way more powerful tool we already own to process stuff. Last but not least, we have come up with something more sophisticated to face what scares us the most – the incomprehensible – which is art.

Nonetheless, I find the world of data extremely interesting, almost sexy, in a sense. The fact that reality could easily be broken down to numbers and facts definitely has a comforting and calming effect on 

my otherwise restless nature. I fully understood the many faces of the freudian concept of unheimlich (the psychological experience of an event or individual as not simply mysterious, but frightening in a way that feels oddly familiar) when I read my first trend report, almost a decade ago. On a rational level, I knew that those polished and well designed documents are one of the most sharpened tools used by capitalism to flood an already oversaturated world with objects and services we don't really need. But on the other hand, I find that clusterization of the real to be deeply true, in a way that is similar to how good contemporary art impacts me when I have the chance to encounter it.

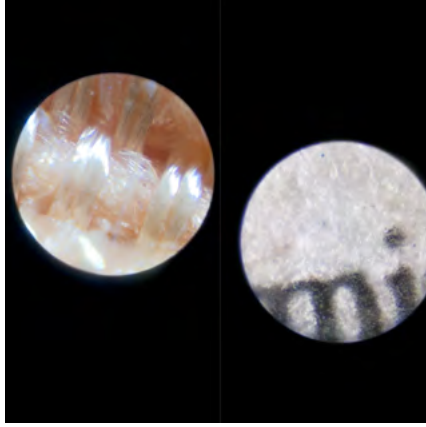
This book was conceived as a special project between Wemanage, a consulting firm for luxury and design related brands, and Fashion in Process Research Lab, to give the opportunity for a small selection of young italian artists to interpret market data into a reflection about the complex times we're living into. We hope that the sum of it is, as they say, more than its parts.

And I also want to thank Lidia Vigna, Leonardo Arienti, Matteo Patalano, Andrea Sabetta and Jasmine Cassi of Wemanage and K-448, without them (it's true) this thing would not exist. And Lucia Scaffardi, Chiara Colombi and Federica Vacca of Fashion in Process for believing in this and to give us their precious time and impeccable precision in everything.

And of course, all the artists involved.

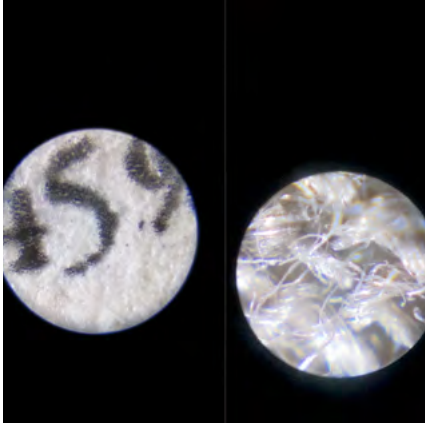
Fashion and sustainability

**as seen by
BBTA Research Group**



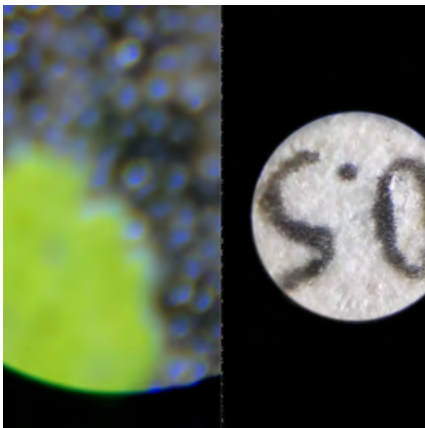
Today, carbon dioxide is hitting 50% higher than pre-industrial levels

We live in unsustainable times. According to the IPCC (2022), if current climate commitments are met, the Earth will still reach 3.2°C by the end of the century. The scientific community is now unanimous in pointing to human activities responsible for the climate crisis. CO₂, a byproduct of burning fossil fuels for energy, clearing forests for agriculture, and other human activities, has been and continues to be the biggest culprit in climate warming.



It is necessary to rethink development patterns to limit warming to about 1.5° C. This will require global efforts to prevent greenhouse gas emissions from peaking by 2025 at the latest and being reduced by 43% by 2030.

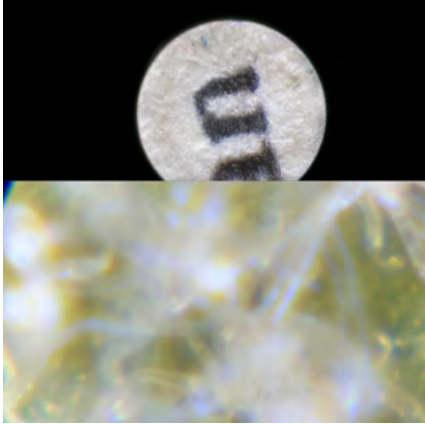
The rise in temperatures now produces a bidirectional and symbiotic process. Climate change is one of the main drivers of biodiversity loss. Still, the destruction of ecosystems undermines nature's ability to regulate greenhouse gas (GHG) emissions and protect itself from extreme weather conditions, thus, in turn, accelerating climate change and increasing our vulnerability to it. In this scenario, it is necessary to rethink development patterns to limit warming to about 1.5°C. This will require global efforts to prevent greenhouse gas emissions from peaking by 2025 at the latest and being reduced by 43% by 2030. Even if we do this, it is now almost inevitable that we will temporarily exceed this temperature threshold, but we may return below it by the end of the century.



The way we manufacture and use products is responsible for 45% of greenhouse gases and 90% of biodiversity loss.

Business as usual is not working anymore. Industry at large needs to apply a new paradigm that establishes a vision for sustainability. This different approach could be represented by the circular economy, eliminating waste pollution, circulating products and materials, and regenerating nature. The objective for companies is to achieve:

- The closure of resource flows, with their recovery, recycling, and remanufacturing.
- The slowing of the circuit of use, as for the extension of the life of products or the fight against accelerated obsolescence, and the narrowing of the same circuit of use.
- The efficiency in using resources that is realized in avoiding waste and producing more with the same amount of resources and materials.



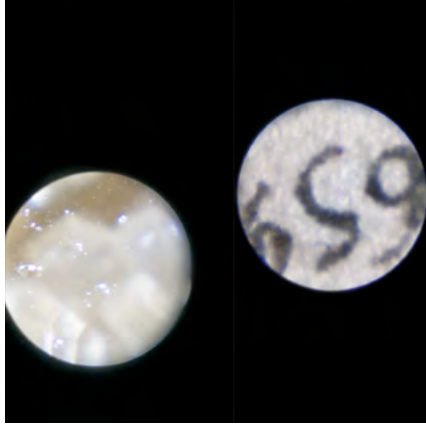
Today, less than 1% of garments are recycled into new clothes. As a result of these unsustainable cycles, 87% of all the materials used to make clothes end up in landfills or are burned in incinerators.

Circular economy models apply to fashion to end a wasteful and highly polluting system where clothes are designed without considering their life cycles. Circular fashion is designed and implemented based on a sustainable production and consumption model, where materials and products are recovered, recycled, and reused, reducing waste and emissions. This is important because worldwide, the fashion industry generates around 20 million tons of waste every year. Circularity could support fashion professionals in rethinking manufacturing and sales processes to facilitate items' repair and reuse, extending the life of garments through process innovation and guaranteeing to be transformed into something else, in the end, with the final aim to avoid waste.



57% of European consumers have made significant lifestyle changes to reduce their environmental impact, and 67% of European consumers consider the use of sustainable materials an important purchasing factor, with 63% also considering the use of sustainable materials a brand's promotion of sustainability.

Setting a more targeted consumer-facing strategy could support the fashion industry in satisfying the growing demand for sustainable offerings, meeting higher environmental and ethical standards expected by customers, and maintaining the profitability of their products. Such strategies could impact the whole supply chain with innovative production methods or by testing and rolling out new business models to provide more sturdy, high-quality garments at affordable prices.



65% of consumers plan to purchase more durable fashion items, 71% to keep items they already own longer, and 57% are willing to repair items to prolong their use. Among younger consumers, there is interest in purchasing second-hand fashion. Around 50% of Gen Zers and millennials expect to buy it.

The circular economy will reshape the apparel industry. This kind of renewal is long overdue, and now the first changes are emerging, as the average quality and durability of clothing on the market increases, so will the opportunity of capturing its value through new business models. But what will move the needle on circular business models will be the circular consumer awareness and experience that will continue to reform the industry, protecting workers and the environment. In keeping with this is the trend in European consumer behaviour. According to this, the fashion industry faces intense pressure from consumers demanding more responsibility. This activism further boosts the topic of circularity and feeds the discussion on how to transform the fashion industry concretely.

New generations

as seen by
Cristina Troisi



86% of consumers over 18 bought or are open to purchasing secondhand products in the future.

This study conducted by ThredUp showed how the fashion resale market has grown since 2016. Inspired by the fashion industry, we may also find this secondhand retail strategy in diverse sectors such as electronics and interiors, ranging from thrift shops to e-commerce platforms and rental services. This world is popular especially amongst GenZers who are becoming more mindful consumers and searching for pre-loved items that also allow them to have high-quality outfits while taking care of their finances.



Online searches for women's heels were up more than 200% in August 2021 compared with August 2020

As we started to come back to normal after extended lockdowns, there have been increased purchases of occasion and work outfits that do not compromise comfort. Doubtfully anybody could go back to the tight or uncomfortable outfits after wearing loungewear day in and day out. Adjusting to our new lifestyles, we see garments like relaxed blazers instead of suits for the workplace.

Consumers search for flexibility in every item and are willing to allocate some budget to dress up.



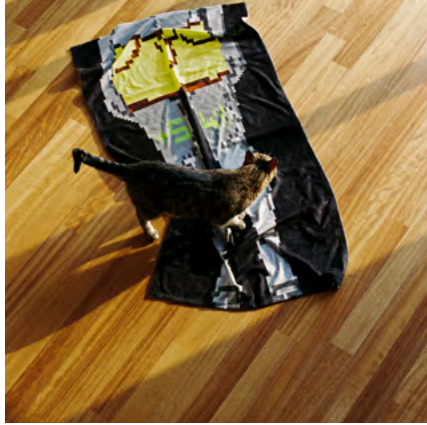
Activewear has seen increased demand in the past year, with outdoor brand Arc'teryx growing 54% with regard to 2020.

It is clear that streetwear has been influenced by the need to stay comfortable after the pandemic. In this case, the gorpcore movement has been especially highlighted. Very technical garments and accessories also inspire big luxury brands like Prada and Dior, crafting collaborative collections with outdoor apparel brands. The name is an acronym for 'Good Old Raisins and Peanuts', and its star items are rainproof Goretex jackets, cargo pants, hiking boots, and bucket hats.



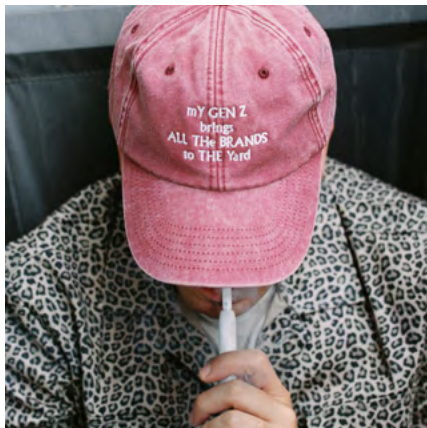
32% of fashion executives mention the word digital as one of the most significant growth opportunities.

It is no doubt that the Metaverse is one of the most trending topics, the parallel digital reality will affect more than one aspect of our lives. Digital-inspired colours such as lavender and blue are shades that relate to our digital existence while being soothing and tapping into a sense of wellbeing. Connecting to our digital side is a chance to appeal to our digital self and curated avatar, where we feel free to explore and express ourselves.



54% of the runway images from London Fashion Week 2022 showed miniskirts, states Heuritech, 2022

For the f/w seasons, brands like Supriya Lele showcased a range of short skirts in unconventional colours and textiles and some low-rise fittings. We might also relate this trend to the Y2K aesthetic that have made their way through social media and fashion, with the Free Britney movement, and the last collections of Blumarine, Miu Miu, and Juicy Couture. An overall feeling of nostalgia is shared, where a sense of a past time when things were better calls for a spirit of shared childhood and retro revivals.



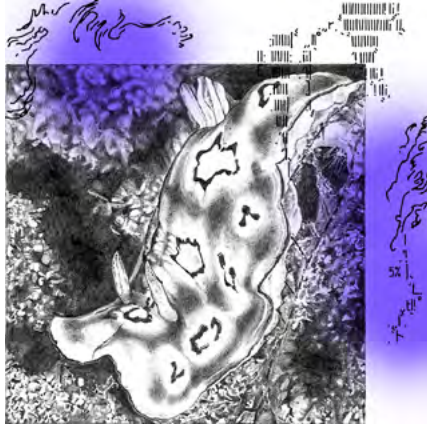
81% of Gen-Z played video games in the past six months, averaging 7.3 hours per week.

As the Metaverse is making its way as the newer normal, we see it is not only gaining hype among every business creating their online and digital environment offering services and commercial platforms. Some of the industries that are starting to explore the Metaverse are retail, entertainment, gaming, real estate, finances, art. The list goes on.

Fashion leaders have also seen an opportunity here, where new values are being discovered every day. In hand with digital fashion, a growing community finds a comfortable space for exploring this alternative environment.

Retail and commerce

as seen by
Glada Florindi



Fashion companies focused on metaverse innovation, and commercialization could generate more than 5% of revenues from virtual activities over the next two to five years.

Today, the fashion industry is writing a new chapter within the metaverse world. Virtual reality will allow companies to gain access to a new revenue stream and earn money by selling their virtual items in a decentralized marketplace. An additional advantage is a possibility of reaching a larger group of fashion enthusiasts, who will be able to participate without being physically close to the brand. Brands can engage in the metaverse across five dimensions:

- Digital assets: branded virtual clothing and NFTs
- Digital experiences: events in digital worlds
- Gaming: online battle games such as Fortnite and Minecraft
- Platforms: asset marketplaces and digital-physical gateways
- Virtual worlds: games or other immersive social environments



1 out of 3 persons from Gen Z affirmed being overwhelmed by the number of social issues that need to be addressed, and 1 out of 2 are less likely to buy from a brand that chooses to promote the opposite side on social issues that matter to them.

Fashion consumption paradigms are undergoing a social transformation. If Millennials had already started to point out significant changes in the buying and selling models, now Gen Z brings a different requirement criterion based on their beliefs and values. With a spender power of \$4.4 trillion (Snap Inc., 2022), they are interested in getting to know the stories behind their favorite brands. To engage with this young and entrepreneurial generation, fashion companies will have to elevate their strategies. Only 15% of Gen Z and 14% of millennials strongly agree that businesses are taking substantive actions regarding sustainability. (Deloitte, 2022)



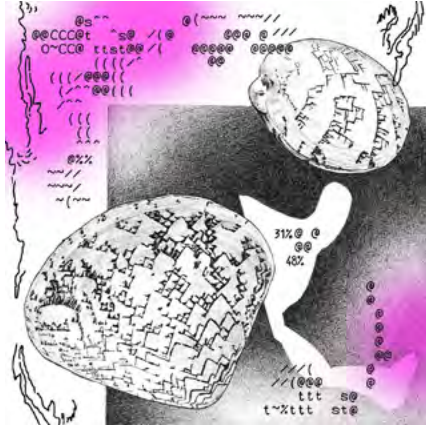
71% of consumers expect fashion companies to deliver personalized interactions, and a similar proportion says it is frustrating when this does not happen.

In increasingly complex retail, brands constantly seek solutions to meet new demands and expectations. Especially throughout the pandemic, there was a need for companies to continue acting to connect to customers. The fashion industry will take personalization beyond marketing based on past purchases or online browsing history. Today, enabled by AI and Big Data technologies, businesses have what it takes to make the customer experience personalized across all the touchpoints.



Second-hand is becoming a global phenomenon, expected to grow 127% by 2026.

Digitizing consumption and low purchasing power – especially among younger consumers – have accelerated interest in second-hand items. Such market has grown exponentially, praising one of the most promising sectors of fashion, the so-called circular economy. Driven by the effects of the Covid-19 pandemic, retailers are embracing resale to satisfy consumer demand, relying upon the opportunity for engagement and increased revenue. As resale becomes a strategic approach, more than half of retail executives without resale programs say they feel behind the curve relative to their peers. (GlobalData, 2022). Regardless of the very optimistic growth outlook for the coming years, the second-hand market also faces challenges, such as credibility, quality, and authenticity of the products.



48% of consumers in surveyed countries worldwide say they get inspiration for purchases when they are online. In addition, 31% say they are researching online more before purchasing to avoid stock, inventory, and shipping challenges.

Covid-19 generated impact and changes in the daily activities of the world population. Concerning consumer habits, there has been a change in the purchase journey in recent years. People now combine online and offline experiences to fulfill their needs. When it comes to fashion, the key is to offer a phygital seamless experience to the shopper, allowing them to reach the wished item most conveniently, ordering online or finding the closest physical store with stock availability.

Brand marketing

**as seen by
Maison Gola**



According to Financial Times in 2021 NFT market counted 360k owners for almost 3 NFT owned.

These numbers are going to increase, luxury fashion brands are experimenting with new forms of customer engagement through NFT-related projects. NFTs allow property certification for digital products and artworks, consequently opening the possibility for digital artists and content creators to produce limited editions and unique pieces. These works can be easily displayed on social media with the possibility to reach a wider public compared to traditional galleries and collectors' platforms, opening new possibilities for brands in terms of marketing strategies and influencer marketing. For its property of exclusiveness, in fact, NFTs can bring the relationship between influencers and followers to a more personal level, thanks to the possibility of exchanging unique and exclusive contents.



The gaming industry has more than 2.7 billion gamers worldwide.

Its young audience is attracting luxury brands, which are starting to enter the worlds of online games like Fortnite and Roblox, offering virtual experiences and products. Since online gamers are accustomed to paying for digital assets, these online gaming experiences can be considered as a preparatory phase for what Metaverse virtual worlds could be in the future. Gaming it's not just attracting Gen-Z gamers, Gen X and Baby boomers represent 25% of online games' audience growth in 2021, which shows growing potential for older gamers, whose top genres in games are action, puzzle, and simulations (i.e.: Roblox). Gamification is also a valuable method for improving brands' customer engagement, motivation, loyalty, users' onboarding experiences, and data gathering.



Discord usage has been increasing by 19% since 2020.

Even if it might not seem like a natural marketing channel, there is a clear and growing business case for experimenting with this platform, and many fashion and lifestyle brands have already hosted events on their Discord servers. After becoming famous for being used for sneakers' reselling, Discord has today more than 150 mln monthly active users and recently turned down Microsoft's \$ 10 bln takeover offer. The app is a highly customizable space, where it is possible to create communities around specific interests in full privacy and freedom, through which users can talk to friends or strangers in real-time via voice, text or video chat. The space for fashion within the platform is still a niche, but the servers tagged fashion are constantly increasing. The most popular pages are those reserved for subcultures close to the world of gamers, streetwear, outfit reviews, or pages such as 'Fashion of Discord' or 'Fashioncord', in which fashion shows are criticized and editorials discussed.



Around a third of TikTok, Snapchat and Instagram users in the U.S. and UK say Augmented Reality is helpful for trying on products.

Beauty brands already offer virtual product testing for cosmetics on Instagram and e-commerce, and the possibilities for fashion, tech, and lifestyle industries are expanding.

While AR can do a lot of good, this does depend on how companies use it. Since 2020, there's been a drop in filter usage in various parts of the world. One in five social media users wants to see pictures that don't use branded filters. It seems consumers are impressed by companies using AR to enhance the shopping experience and provide information on products, but they don't like it to be used to augment promotional content on social networks.



Today, two million of the estimated fifty million creators on YouTube, Instagram, and Twitch now make six-figure incomes from revenue models such as advertising, paid subscriptions, merchandise, and live or virtual events.

YouTube is expected to generate almost US\$30 billion in advertisement revenue from creators this year, which it will share with the video makers who generate the content.

Meta (formerly Facebook) recently announced it will pay content creators more than US\$1 billion by the end of 2022 through new bonus programs designed to keep them plugged into its app ecosystem. Short videos are typically associated with Gen Z, but the gap between short and long content is getting shorter. This is explained by younger consumers' interest in how-to videos and vlogs. One in four consumers watches a video made by a brand each month.



Nine out of ten online focus group participants said they often or sometimes need more information about products before making a purchase.

Increasingly, brands will likely compete with one another on information layers. If one brand organisation decides not to include them, a rival brand might, bringing more easily the customer to purchase. Answering customers' demands for information on products and firm practices is a way to show transparency, which builds credibility. Therefore, the layers of information a brand chooses to publish should be a clear and open demonstration to its customers of how it's acting.

Customers expect brands to be consequent on their commitments at the right time, and in the right way in the customer journey. They want to be able to get answers when interacting with the product or service they're considering buying, and at the point of purchase.

Digital life
as seen by
Stefano Serretta



"DUDE, IT WAS WORTH IT!"
 "BUT ITS NOT EVEN REAL..."

Three min are the followers Lil Miquela has on Instagram (@lilmiquela)

The influencer is Brazilian-born, 19 years old, lives in LA, and collaborates with the most famous brands and celebrities such as Calvin Klein, Prada, Millie Bobby Brown, and Bella Hadid.

Then started her career as a singer, having millions of plays for her singles on Spotify.

All 'normal', right? Yes, except that this girl only exists virtually. She is not a robot but a creation of motion graphics. And she is not even an artificial intelligence: behind her posts is a team of real people coordinating content for her. Nevertheless, no one can predict what she will say, what she will wear or what she will do, being its software based on computerized calculations collecting and translating big data from the web.

Digital companies believe the future of influencers is clear: artificial intelligence will be able to replace physical people for the creation of viral content on social media.



IF THE NEWSPAPER DISAPPEARS, HOW
 WILL I IGNORE YOU?
 ASK OUR SON, HE IS ABLE TO DO IT ALL DAY.

Gen-Z spent an average of 8 hours per day on screens in 2020.

Part of the appeal of virtual worlds is the chance to engage with others and build communities — a need that was exacerbated when global Covid-19 lockdowns ended most in-person social contact. As digital spaces become more dynamic, some consumers are participating in “digital campfires”, where they can connect with others who share their values, have conversations, tell stories, and co-create. These soaring levels of engagement have spawned a new generation of digital fashion creatives pushing the limits of possibility online. Brands, meanwhile, see the emerging “metaverse,” in which people work, play, socialise and shop, as an opportunity to engage more deeply and creatively with their customers and unlock new value streams.

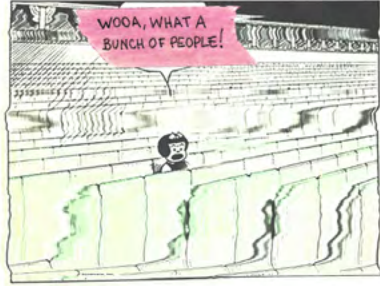


The price range for Prada, Thom Browne, and Balenciaga's complete looks in the Meta fashion store is \$2.99 to \$8.99.

This makes high fashion clothes commercially accessible and available to wider groups of digital users, progressively shaping their digital selves through and for the Meta platform.

"This essentially positions the Meta looks as the NewGen equivalent of a lipstick: the ultimate in diffusion lines, almost all barriers to entry erased", reports Vanessa Friedman in her "The Avatars wear Prada" NYT article.

These aspects trigger reflections on how wearing these skins on our digital avatar could be a unique, value-signaling, and experimental language to express ourselves and a significant driver of the creative economy, or if they will only be another vehicle for imitation and brand advertising.



108,000 unique attendees throughout the Metaverse Fashion Week.

Virtual real estate platform Decentraland jumped at the opportunity to recruit fashion brands and fans to its blockchain-based platform for a four-day event in March 2022.

Despite several technical issues concerning user experience (such as synchronization and high-quality visualization), the events worked well to attract visitor traffic, making brands validate the metaverse as a new venue for advertising and reaching consumers. Open questions arose after the event regarding whether it makes sense to adopt the codes of reality to virtuality and which will be the meta-strategies to be adopted by IRL (In Real Life) brands: to stay conservative and imitate physical collections (as Etro did) or to follow the free and creative experimentation allowed by the virtual (as in the case of D&G) with the possibility of getting lost?



For the first time in 2019, Quantstamp CEO Richard Ma gave his wife a \$9500 dress that did not physically exist

It was a digital haute couture dress created by the Dutch company The Fabricant, which specialized in creating digital fashion, i.e., digitally designed hyper-realistic garments, existing only in augmented and virtual reality. Indeed, once the dress is designed, 3D specialists model it digitally instead of physically prototyping it. Today digital fashion represents the connection between virtual reality and tailoring. Indeed, working solely in digital allows designers to create objects that push the boundaries of the extravagant and the possible since digital clothes are coined and sold as NFT on online platforms or used as filters on social media. But can they also be a way to reduce the incredible rise of fashion consumption and the constant overproduction the industry faces?



"PUT THIS NET IN FRONT OF THE SCREEN, IT SHOULD BE ENOUGH."

53% of fashion executives say it is either likely or very likely their company will experience a significant cyber-attack in 2022

Businesses face growing hazards from cyber-attacks, which are getting more frequent and sophisticated as the digitization of the fashion industry advances. Intellectual property in the digital sphere needs more robust protection because procedures like design, drafting of manufacturing standards, certification, sketching, and prototyping have been heavily digitalized in product development and are now frequently saved online. The need to preserve online assets will only grow as the number of valuable digital assets, like NFTs increases.

This is also brought on by consumers' growing and enthusiastic online shopping, which gives companies access to sensitive and valuable data. Therefore, brands must act quickly toward cyber resilience to strengthen their defenses in the face of rising consumers, regulatory pressure, and sophisticated

Technology and innovation

as seen by
Ada Varaschini



Companies implementing AI-driven initiatives between now and 2030 could generate a 13% increase in cash flow

The pandemic and daily challenges pushed more and more companies to embrace AI technologies to improve operational efficiencies and increase customer engagement. According to the “State of Fashion Technology 2022”, timely adoption of these technologies is desirable and key to raising business returns. Tech-savvy fashion industry players already counting on the benefits of such integrations could expect a 118% cumulative increase in cash flow by 2030. Conversely, laggards not embedding AI-driven operations within their business before 2030 may expect a 23% relative decline.



Kim Kardashian's post wearing Balenciaga at the Paris Couture Week has generated almost 2.5 million likes and 10,000 comments in one week, achieving a MIV[®] of 935,000\$.

Have you ever wondered what the impact of an influencer's post is? Thanks to the Media Impact Value (MIV[®]), Launchmetric's proprietary Machine Learning algorithm, it is now possible to measure the value of every social media, press, and online post. The algorithm analyses quantitative and qualitative data about placements, interactions, and mentions of a brand's content across different communication channels, providing Fashion, Luxury, and Beauty industry players a unique monetary value to rate and compare marketing strategies' performances.



In 2021, the value of the top 50 investments in fashion-tech projects grew by 66% compared to 2019

Capital streams into technologies that make fashion businesses more agile, sustainable, and engaging for consumers. On top of investors' interests, B2B e-commerce and online shopping solutions stand out, receiving about 55% of the funding. The rest primarily includes payment technologies, social commerce, and resale. Followed by digitized supply chain and logistics solutions, analytics, and artificial intelligence to leverage consumer data. Interest is also sparking for companies working in NFT, blockchain, Web3, and Metaverse developing 3D technologies, digital fashion collections, augmented and virtual reality gaming environments, and e-commerce. Still not sure what fashion-tech means?



Luxury brands lost \$98 billion in sales to counterfeits in 2017 alone, with online counterfeiting making up 31% of the total.

Counterfeits are a massive and widespread issue for high-end companies, affecting profits and reputation. In response to this challenge, luxury brands are looking at blockchain technologies to increase trust, security, transparency, and data traceability. Subverting competition in favor of a common good, luxury conglomerates LVMH, Prada Group, and Richemont founded in April 2021 Aura Blockchain Consortium, a non-profit organization investing and developing applications of blockchain technology for the luxury market. The consortium's solution currently serves over 20 brands, hosting more than 17 million products registered as "digital twins" on the platform (CNN Business, 2022).



Japanese researchers set the new data transmission speed record of 1,02 Petabits per second over 51.7 km, 100,000 times faster than the fastest home connection speed.

In an era of greedy bandwidth services and an explosive increase in data traffic, the need to develop technologies to meet this demand is crucial. Researchers from the Japanese National Institute of Information and Communications Technology (NICT) demonstrated it is possible. The technology they developed achieves a data speed equivalent to 10 million channels of 8K broadcasting per second and is compatible with existing manufacturing processes and conventional cable infrastructures. Despite being considered a significant step toward realising communication systems supporting the evolution of Beyond 5G information services, real-world constraints and challenges may considerably slow its implementation.



Tissue and organ scarcity is a critical public health concern, with less than 10% of the global need being satisfied.

Research is advancing in regenerative medicine, with 3D bio-printing of tissue and organs promisingly playing a vital role. In March 2022, the American Biotech company 3DBio Therapeutics and Dr. Arturo Bonilla set a new milestone in the field. A 3-D printed ear grown with a patient's cells was successfully transplanted; it will mature over time and develop the features of a human ear. While the proprietary reconstructive procedure and transplant, part of the company's ongoing clinical trial, could revolutionize how doctors repair or replace tissue and organs, we may start wondering... What could be next?

Secondhand markets

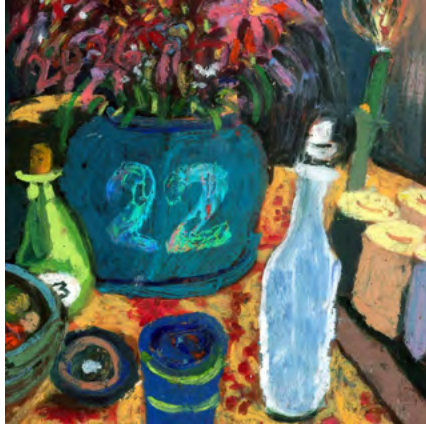
as seen by
Martina Bruni



In 2016, about 107 billion units of apparel and 14.5 billion pairs of shoes were purchased. By 2030 global apparel consumption is projected to rise by 63%, from 62 million tons today to 102 million tons, equivalent to more than 500 billion additional T-shirts.

We're buying more and more clothing, and we're also throwing away a lot of these purchases, with 84% of clothing ending up in landfills or incinerators.

It's an unsustainable number that pushes us to find ways to get more use out of each piece in our wardrobes. This is fundamental to reducing the impact of our fashion choices on the planet.



Secondhand is becoming a global phenomenon, expected to grow 22% by the end of the year.

It is predicted that the global second-hand apparel market will have exponential growth, 3 times faster than the global clothing market in general by 2026.

Shopping secondhand is proposed as one of the solutions consumers can adopt to reduce the impact of their wardrobes.

Growing concern about the planet and possible financial crises are driving consumers to consider local secondhand stores or resale websites.



Sites such as Depop, The Real Real, or Vestiaire Collective, have truly revolutionized the way consumers think about secondhand. 74% of consumers have purchased or are willing to purchase second-hand clothing.

Technology and online marketplaces are driving the growth of the secondhand market. Online resale is the fastest-growing sector of secondhand and is expected to reach over 50% of the market.

For 70% of consumers, it is easier to shop secondhand than it was 5 years ago. This is possible because of the emergence of technology and online marketplaces.



The clean-out trend accelerated during the pandemic with 57% of consumers selling their unwanted apparel in 2021.

The surge was caused by the millions of people who spent time at home during the lockdown clearing out closets, attics, and garden sheds. The results of such cleaning have led to people selling their unwanted possessions online. But this is not a short-term trend. According to McKinsey, second-hand will continue to expand due to consumers' growing concern for sustainability.

Although 30% of consumers say they have purchased more secondhand fashion items online than before the pandemic to save money, an average of 38% say it is a choice dictated by a desire to reduce waste and the related impact.



By 2030, competitors' channels as rental channels are expected to remain flat, and department stores and value chains are expected to lose the most market share.

A recent ThredUp study demonstrates how second-hand is dominating the clothing market compared to all the other channels combined. Secondhand is expected to grow by 9 points, more than any other sector: From 4% to 18%. This is because second-hand is attracting more customers than any other category. In the UK, 75% of GEN Z and Millennials customers plan to spend their apparel budget on second-hand clothing over the next years.



Italy recorded a 137% increase in second-hand clothes deposits and a 128% increase in orders. The increase covered 3 categories: menswear (+190%), women's ready-to-wear (+149%), and women's accessories (+108%).

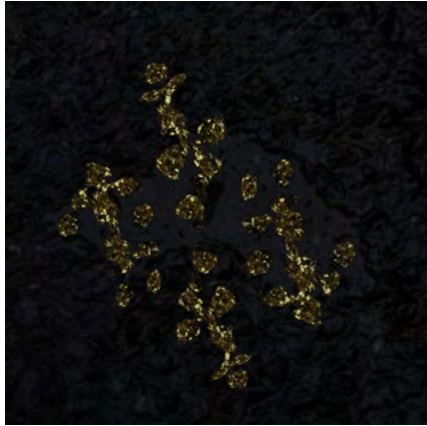
Italy is the leading country in Europe for the production of textiles, clothing, and accessories with 41 percent of European fashion production on our territory. This strong presence of manufacturers was one of the reasons why second-hand fashion was not such a widespread consumer habit.

Today, times are changing. As reported by Il Sole 24 Ore, which processed data provided by the Vestiaire Collective platform, between March and June 2020, Italy recorded a 137% increase in second-hand clothes deposits and a 128% increase in orders. The increase covered 3 categories: menswear (+190%), women's ready-to-wear (+149%), and women's accessories (+108%).

The consolidation of this trend demonstrated how this new consumer habit second-hand is now becoming established in Italy.

Decolonising fashion

as seen by
Cora Manfredi



13 pieces from the V&A museum's Asante collection are looted court regalia.

The seized treasures were acquired by the Victoria and Albert Museum in 1874 and are now likely to return to Ghanaian territory; Asante represents one of the two biggest West African cultures, together with Benin. Most of the items were forcefully handed to the British after they raided Kofi Kariki's palace and "imposed an indemnity of 50,000 ounces of gold" (V&A, n.d.), which the Asanthenes paid with gold beads and jewellery. Amongst these items, we may find a flower-shaped pectoral disc worn at purification rituals by priests, which London crown jewellers then auctioned. Besides moral property principles, looted objects belonging to certain cultures make part of their present cultural identity, enabling the sharing and passing on of their traditions and history. The failure to return these stolen objects perpetuates colonial regimes, especially since the self-proclaimed universal museums holding them are usually not universally accessible to all.



Hailey Bieber's "Brownie Glazed Lips" video has over 21 million views on TikTok.

The video showed how to style the make-up look using brown liner and gloss, for which Bieber soon began to receive credit, ignoring that women of colour popularised the look in the 80s. The fine line between cultural appropriation and cultural appreciation finds its differential point in the inspiration. Numerous influencers and fashion houses have been called out for cultural appropriation. Although it is valid for designers to draw inspiration from a cultural exchange, a creative interpretation is always needed for this to expand our views of the world in a way that acknowledges and gives credit to the original communities that create them. Avoiding the reduction of these skills and symbols into becoming copied elements also involves knowing what these elements portray and represent.

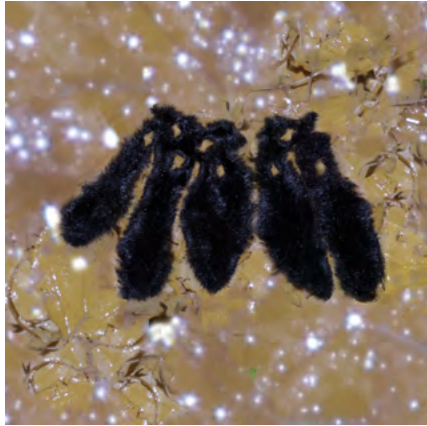


Half of the models for the New York Fashion Week 2022 show by Ay Lelum were Indigenous.

Ay Lelum, 2022

The design house is a multi-generational artist family that collaborates in creating Coast Salish fashions based on Snuneymuxw First Nation in Nanaimo, Canada; they also host events and workshops. This year, the house had 5 Coast Salish models representing their community and culture. The participation of the first all-Indigenous modelling agency Supernaturals in NYFW 2022 also saw various participations in the runway shows of designers like Rebecca Baker, Alicia Designs, Korina Emmerich and Copper Canoe Woman.

Still, these are not the only Indigenous fashion houses that are making a presence in the fashion world where there has been a long underrepresentation of Indigenous faces and clothing systems. B. Yellowtail Collective, for example, understood the importance of sustaining Indigenous traditions to preserve their culture. Made up of Native artists and artisans from diverse origins, it fosters economic opportunities for their communities.



Searches involving a-gendered related keywords have increased by 33% on the fashion shopping platform Lyst.

Terms such as androgynous and gender-neutral have been increasingly used as search prompts since last year. Back in 2016, Wunderman Thomson had already stated that 56% of Gen Z people shopped outside of their supposed designated gender area, thus ignoring the categorised and labelled sections in retail spaces. Even though non-binary fashion has been around for many years as a means to experiment and express gender, it is in present social media context that the binary division of retail and online shopping spaces is beginning to change.

One of the first 'gender-free' stores in New York is The Phluid Project, a space to empower the LGBTQIA+ community founded by Rob Smith, inspired by his Ojibwa tribe Native American heritage and the Two Spirit Indigenous leaders. The growing representation of this gender fluidity in fashion is relevant since it allows its democratisation across the whole gender spectrum, highlighting that it is not just a trend but gaining more visualisation.



Seed2Shirt Farmer Enrichment Program sources organic cotton from 12,000 BIPOC (Black, Indigenous and People of Colour) farmers, partnering with 350 thousand cotton farmers in West Africa.

Based in the United States, Seed2Shirt's apparel promotes ethical and sustainable development, creating positive social impact by empowering BIPOC cotton farmers, providing them training and liveable wages. Imperial and colonial contexts have historically controlled cotton trade. Initially concentrated in India and China, cotton cultivation shifted with the proliferation of European imperialism and the Trans-Atlantic slave trade between the 16th and 19th centuries; Enslaved Africans and their American descendants were the cultivators for the North American cotton industry that allowed White plantation owners to gain great wealth. This labour and agricultural exploitation were the foundations of the modern fashion industry, especially in America, where Indigenous populations were forced from their lands to cultivate cotton. (Mayer, 2020 & Fincher, 2022). Programs such as Seed2Shirt help build communities with intrinsic values and systems of equality that break from long-dated colonial practices that maintain the status quo.



29% of fashion brands disclose actions that promote gender equality in their supplier facilities.

Fashion Transparency Index by Fashion Revolution, 2022

Although a gender-equality focus should be applied throughout the fashion industry's whole supply and production chain, only 8% of brands publish sex-segregated data on the distribution of job roles in their supplier facilities. The lack of information and measurement of these indexes means there is a knowledge gap, precluding the chance of improvement. These figures are particularly alarming since the fashion industry employs and is primarily fuelled by female workers and consumers.

This lack of female representation brings sexist consequences in an industry where men predominantly fulfil senior roles. Gender equality not only brings up discussions of labour conditions and fair wages, but it also highlights that the power and profit generated by marginalised female groups working in the fashion supply chain remain marginalised of this wealth. Measuring fashion brands' transparency figures may bring us to understand the power dynamics embedded for centuries in the industry and how to dismantle them.

Fashion and social media

**as seen by
Tamar Matan**



74 percent of consumers say that they are now more influenced to shop via social media...

...than they were before the pandemic, and 70 percent cite clothing as one of the product categories they shop for most on social media.

While Western markets may still lag China in rates of adoption, social shopping has gained a global foothold and is poised to grow in the year ahead as social media giants from Facebook and Instagram to YouTube and Snap Inc. invest heavily in shopping features and take advantage of new functionalities.



By 2027, worldwide social commerce sales are set to reach over \$600 billion.

In the US alone, annual sales through social commerce are expected to surge from approximately \$37 billion in 2021 to \$56 billion in 2023 (this includes sales of all products and services agreed on social platforms regardless of the method of payment or fulfillment). In some markets, social media is fast becoming a preferred way of shopping and interacting with brands, as social platforms are increasingly augmented with advanced technology. Indeed, social commerce — from in-app checkouts on social media platforms to sales transactions on live streams — is already booming in China.



The first shoppable fashion event in live stream with TikTok got seven times more views than expected.

In the US, during Walmart's first shoppable live stream fashion event with TikTok, it gained seven times more views than anticipated and grew its TikTok followers by 25 percent, according to William White, chief marketing officer for Walmart US.

In August 2021, the social video platform announced an expansion of its partnership with Shopify including a pilot test of TikTok Shopping with select merchants across the UK, US, and Canada, which could help brands enable social commerce. Brands looking to leverage community-specific platforms as a way of boosting the discovery phase of social commerce should take care to engage authentically with users.



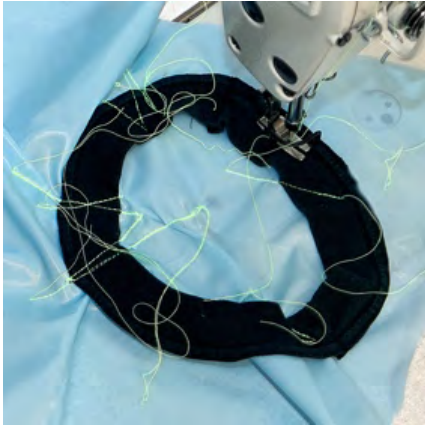
True Fit's Fashion Genome is one of the industry's largest connected data sets, mapping the relationship between 80 million active users, 17,000 brands, and \$300 billion in cross-market transaction value.

Romney Evans, the tech entrepreneur who co-founded True Fit, has launched a new business: Shoptrue. The fashion marketplace offers 2,000 brands from value-priced garments to luxury labels, where users can purchase styles from any brand in a single place and with a highly personalized shopping experience. For Shoptrue, Evans envisioned a customer journey where AI-driven data helps match consumers to brands and styles they'll find relevant. Fueled by a data-driven understanding of the relationship between shoppers and their personal style, the Shoptrue team said it's developed capabilities that re-insert the user into the AI curation experience, as opposed to style recommendations that rely solely on a prescriptive algorithmic approach.



Spending on influencer marketing skyrocketed from \$1.7 billion in 2016 to \$13.8 billion in 2021.

There are also risks involved, particularly if relationships sour or if the influencer is involved in a scandal or controversy. For many brands, though, the rewards outweigh the risks. In some cases, fashion companies have elevated influencers to brand-defining roles that were once the sole domain of Hollywood stars and supermodels. Hugo Boss, for example, signed a multi-year agreement with TikTok personality Khaby Lame as a global brand spokesperson in 2022.



Boobie is a dog – with over 270, 000 followers on Instagram.

She is among a new wave of “petfluencers” whose appeal has translated into ad revenues, brand sponsorships, and franchises that include scarves, bags, and nails.

Boobie’s account is run by James Pacitto and Charlie Glassman, both creative directors working full-time for a global advertising agency based in New York. Their identities have never been revealed before. Her style reflects Pacitto and Glassman’s personal aesthetic and values: she pairs luxury brands including Louis Vuitton, Gucci, and Balenciaga with contemporary labels such as Paloma Wool and Lisa Says Gah. Boobie’s main source of income is brand deals, accounting for 80 percent of revenue, followed by products and other sales at 20 percent. Most of her partnerships tend to be one-offs but can evolve into ongoing projects if the results are well received.

Luxury goods

as seen by
Maditha De Paoli



The world's Top 100 luxury goods companies generated revenues of US\$305 billion in FY2021, rebounding from US\$252 billion in the previous year, and exceeding the US\$281 billion in FY2019 (before the impact of the COVID-19).

The luxury market seems to be better prepared to deal with the economic turmoil. Despite current and ongoing economic challenges, such as high inflation and rising costs, the luxury market continued to perform strongly and will continue to invest in its future growth this year and for the rest of the decade to 2030. With a broader consumer base and multi-channel ecosystem of access, the obstacles will be less hard to overcome.



Gen Z (60%) and Millennials (63%) are purchasing luxury items at a much higher rate than their elders: Gen X (46%) and Baby Boomers (18%).

That shows that there's a new group of young luxury shoppers - Gen Z and Millennials - who are even more likely to purchase luxury items than their elders. The top drivers of purchases among luxury shoppers are quality materials (64 percent), brand name (52 percent), and longevity (50 percent).

In addition, almost half of the consumers also indicate authenticity as important to them with 39 percent also citing exclusivity.



4 out of 5 (84%) luxury shoppers say they would find it helpful to pay overtime for luxury products.

Gen Z (87%) and Millennial (89%) luxury shoppers find significant value in the availability of flexible, interest-free payment options, which allow them to split their payments over time while getting a more transparent shopping experience.

Adopting an entirely new method of managing payments is always a challenge for any company, but seamless payments applied into premium products are an opportunity for business customer loyalty growth, building a resilient check-out experience suited to the young shoppers.



Accessories remained the largest personal luxury goods category in 2021 and grew by 8%, relative to 2019, to reach €62 billion.

This fact is directly linked to the male universe, which is increasingly interested in luxury consumption. Through their interest in fashion, beauty, design, and lifestyle, men are looking not only for sources of inspiration but also for brands that communicate and respond to their requests and desires.

As a matter of fact, the global menswear market is experiencing faster annual growth than womenswear and is expected to reach \$546.9 billion by 2026 (Euromonitor, 2022).



84% of luxury shoppers consider touching and seeing a product as essential to the purchasing experience.

In most product categories, this is likely why traditional brick-and-mortar remains the channel of choice among luxury shoppers (Watches and Jewelry: 45%, Food & Beverage: 45%, Beauty: 37%, Home & Interiors: 37%, Health & Fitness: 36%).

Furthermore, luxury digital native brands, after successfully achieving online traction, are moving into brick-and-mortar retail. The motivations vary from the ability to give consumers the chance to physically see and touch the products to the offer of a seamless shopping experience.



The GCC luxury market was worth nearly \$10 billion in 2021 — a 23 percent increase on pre-pandemic levels — and is expected to grow to \$11 billion in 2023.

BoF & McKinsey, 2022

The GCC luxury goods market is growing significantly due to heavy reliance on oil and hydrocarbon revenues and is still expected to grow positively due to the government's proactivity.

Luxury goods sales in the Middle East region are mainly driven by the GCC countries, many large and smaller malls are currently under development in the GCC amid investment by governments and private companies in infrastructure development to complement population growth, a growing tourism sector, and an increase in per capita GDP.

Influencers

as seen by
Le Cose Più Vere della Vita



Influencer marketing, which involves a collaboration between brands and influencers, is a marketing strategy that has been successfully used by thousands of businesses and brands and has experienced continued growth over the past decade, estimated from \$1.7 billion in 2016 to \$16.4 billion in 2022.

The increasing popularity of short video formats on platforms like TikTok, Facebook, and YouTube; the effect of the global pandemic on consumers, which catalyzed social media consumption; and the optimization of data collection, which marketers used for social media ads, are the main reasons for this flourishing growth.

Influencers are perceived as trustworthy experts in their field by their followers, which purchasing decisions are influenced by creators' recommendations and endorsements; the reason why investing in influencer marketing can be part of a valuable strategy for helping brands expand their audience and awareness



According to Scrunch's reports, the "health and wellness" (31%) and "beauty and fashion" (21%) industries are those that most rely on influencer marketing for their campaigns.

The aim of their influencer campaigns is mostly (71%) creating brand awareness during a campaign cycle, rather than increasing sales. As people seek truthfulness, meaning, and genuine connection, authenticity is becoming more and more important in influencers' content strategy over the next few years.

Rather than broad and generic campaigns, audiences expect content to be multi-faceted, intelligent, and targeted. Gen Z, digital natives, will have increased spending power and more voice in 2023 and will be a core target part for brands recording to influencer marketing.



Now with over six million followers across Instagram, TikTok, and YouTube, Miquela, the 19-year-old Robot living in Los Angeles, has become the quintessential virtual influencer.

Her storyline as a robot not only provides a reason for her existence in our world but also gives her a unique, compelling point of view that keeps fans wanting more. The role her followers play is important, hence they have decision-making powers over her storyline through the use of polls, comments, and direct messages.

Miquela is just one of the many existing virtual influencers; what is interesting in this phenomenon is that it represents freedom for creators to craft an appearance and achieve connection without needing to act on their human selves or compromise their financial situations with lifestyle investments, opening the possibilities of expression widely, without all the constraints of real life.



Despite a higher number of followers, mega-influencers and celebrities seem to have lower engagement rates than nano-influencers.

Data from Hype Auditor found that nano-influencers (with fewer than 5,000 followers) have the highest engagement rates (5%), which seems to decrease as the follower count grows, until reaching the celebrity level (1.6%).

This can be because mega-influencers lack expertise in a dedicated narrow niche, resulting in having a less real influence on their audience.

Users engage with their preferred creators via polls, comments, and direct messages, asking for specific content related to clothing, skincare, jewellery, cosmetics, footwear, etc. This gives influencers the opportunity of conveying to brands profound insights about consumers' demands and expectations.

High penetration and usage of social media platforms, such as Facebook and Instagram, among millennials are encouraging fashion brands to invest more in influencer marketing practices. People from the age group of 18 to 34 use Instagram the most, making it the most sought-after channel by fashion influencers and brands to advertise their products



Fashion and Beauty influencers can reach huge audiences and visibility as well as the opportunity to collaborate with many top brands in the world, hence for many of them launching their fashion or beauty label has been a logical next step.

In the past 10 years, many influencers decided to start their brand, and some of these companies became notable competitors in their respective industries. More than ever before, creators will be expected to stand out and contribute with their view on the industry.

Creator-led beauty brands are dominating the industry. 40% of the top 100 creator brands are in the beauty industry, with a total annual revenue of 1.5 billion dollars. The fashion industry instead comprises 23% of the top 100 creator brands, with a total annual revenue of 375 million dollars.



In the age of authenticity, 63% of Gen Z believe that frequent users of a brand are the most trustworthy brand spokespeople.

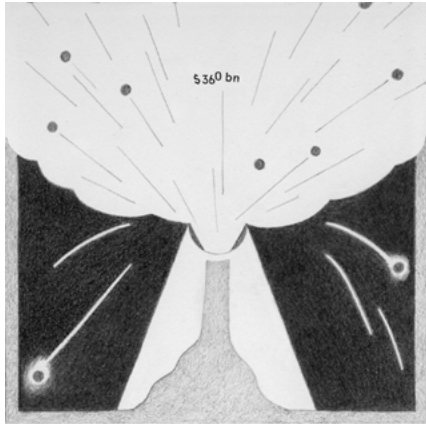
Native digitals are, indeed slowly losing trust in mega influencers and celebrities, in favor of peer-to-peer recommendations, so brands and retailers are looking for their next influencers and ambassadors among their consumers.

Using community casting campaigns brands aim to turn customers into ambassadors. These practices can generate self-perpetuating success cases and push wannabe ambassadors to post pics and tag themselves while using or wearing products, with the hope of being noticed, feeding a thriving online community and a viral fandom.

Using real-life consumers to establish a more relatable and authentic influencer network, brands start collaborations with influencers based on university campuses and launch hashtags to let the boundaries between ambassadors and consumer fade.

Gen Z

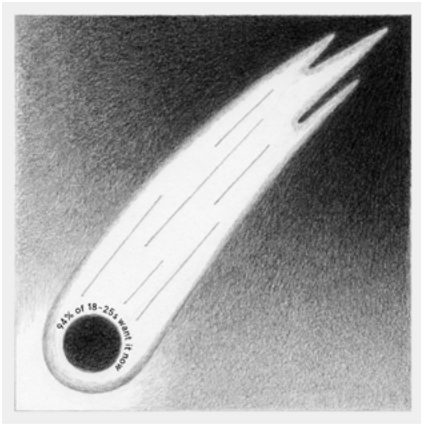
**as seen by
Cristina Amodeo**



Gen-Z consumers have an estimated purchasing power of \$360 billion, according to Business of Fashion Insights.

But as brands and retailers are discovering, changing their gender-specific shopping experiences and building a “fluid fashion” offering that resonates with this generation is far from straightforward.

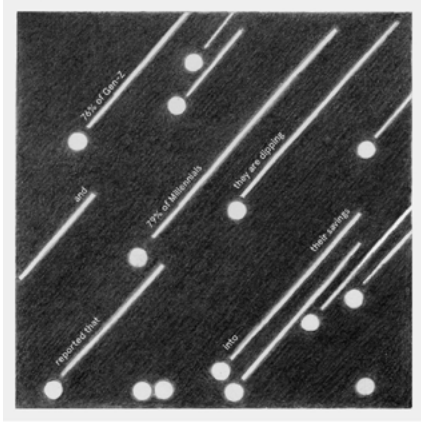
In particular, Gen-Z’s relationship with gender neutrality in fashion can be nebulous at best. For example, the generation is not necessarily seeking out gender-neutral garments — Gen-Z prioritizes other factors such as affordability when purchasing clothes.



94% of 18–25s agree, “When shopping online, I expect my purchase to arrive immediately.”

Over the course of the pandemic, Chinese DTC fast fashion retailer Shein, eclipsed H&M in market share, experiencing a surge in US sales growth of 568% between March 2020 and March 2022.

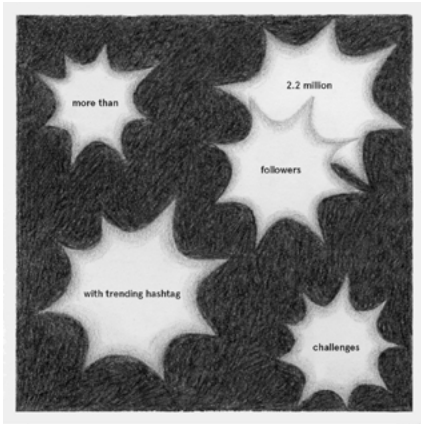
Virality on social media has the power to sell out items. The hashtag #TikTokMadeMeBuyIt has 16.7B views and counting. One notable example is Canadian retailer Aritzia’s vegan leather “The Melina Pant”, known to sell out with every drop.



76% of Gen-Z and 79% of Millennials reported that they are dipping into their savings, taking on more credit, or taking on additional jobs to manage their finances.

The popularity of resale has not been lost on big brands. Lululemon, Dr. Martens, and Patagonia, among others, have started offering resale in recent years through their service or third parties. In addition to Kering's 2021 investment in retail platform Vestiaire Collective, Farfetch announced plans to acquire B2B resale-technology platform Luxclusif to help expand the category.

Meanwhile, Amazon has partnered with reseller What Goes Around Comes Around to sell pre-owned handbags from luxury brands.



Gucci has amassed more than 2.2 million followers on TikTok with trending hashtag challenges promoting user-generated content.

Gucci provides a playbook for luxury. It outranked all mid-tier, fast fashion, and ultrafast fashion brands to become one of Gen-Z's top three favorites fashion brands in an unprompted awareness poll.

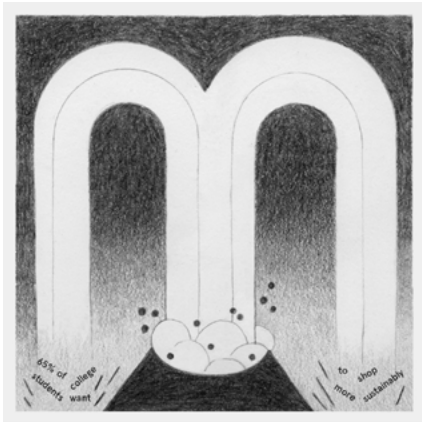
Gucci shows how brands can capture the attention of Gen-Z (as well as Gen-Alpha) consumers by creating positive brand associations so consumers consider its products to be worth saving up or splurging on. Gucci's marketing is accessible to Gen Zers, while its products remain aspirational.



Gen-Z respondents under 20 years of age are more likely to buy products that were not designed specifically for their gender, with 56% of the cohort stating they buy clothing that is not classified by gender at all.

On the fashion app Lyst searches for terms including “genderless” and “gender neutral” increased 33% in the first half of 2021. In South Korea, the number of posts about genderless fashion more than doubled in 2020 on the search engine Naver.

This shift is already translating into sales, as can be witnessed in handbags, a category that traditionally caters to women. Luxury resale site The RealReal reported growth in interest for Birkin bags has grown twice as fast among men than women, and resale marketplace StockX said there is an even split of men and women among consumers shopping within its handbags section.



51% of college students say they want to quit fast fashion or shop it less. Nearly 65% of college students want to shop more sustainably for clothes this year.

BBC, 2019

Gen Z wants to shop more sustainably. More shoppers are reconsidering their priorities when it comes to fashion. Gen Z wants to quit fast fashion for 3 top reasons why:

- Sustainability. They want to shop from more sustainable, ethical brands.
- Quality: they want to buy clothes of higher quality.
- Guilt. They know fast fashion & overproduction is harmful to the planet.