

# GLOBAL BRAND LAB REPORT

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A photograph of two women from behind, wearing traditional headscarves (one white, one red) in a desert canyon setting. The background features rugged, layered rock formations under a clear blue sky.

four





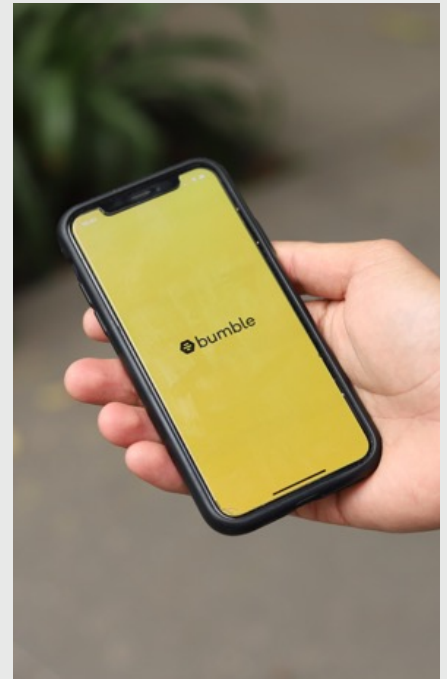
Our brand lab report is compiled by Four's team of retail and lifestyle experts and analyses some of the latest innovations, experimental campaigns and transformative developments, which are keeping iconic destinations, retail and lifestyle brands alive for consumers on a global scale. We also explore how consumer behaviour is changing - now and forever - and how brands are evolving to succeed during this evolutionary time.

*Images on this page and the cover are of Saudi Arabia, our destination spotlight this month. See page 67 to find out more.*



# CONSUMER TRENDS, CAMPAIGNS & BRAND ACTIVITY

TFL CHANGING THE WAY WE LOOK AT TRANSPORT, BREWDOG PARTNERS TECH DISTILLERY TO PRODUCE 'CROWD-CREATED' SPIRITS BRAND AND BUMBLE TAKES OVER STANSTED



Transport for London is celebrating different modes of transport available via the network with posters, film and broadcast. “Champion value” features characters tapping into the public transport network – only to be transported to their destination through a colourful portal, with a number of straplines including For Fast, think tube.

Degen Distillery, a ‘tech-infused spirits start-up’, has announced a partnership with major multinational beer and spirits company, BrewDog, to undertake a “radical social experiment”, where the pair will collaborate with their communities to co-create a new spirits brand.

Online dating brand Bumble rebranded as Bumble Airlines as part of a tongue-in-cheek campaign at Stansted airport. The billboard was displayed for 24 hours on 29 August.

# CONSUMER TRENDS, CAMPAIGNS & BRAND ACTIVITY

## TK MAXX SHOWCASES COST OF LIVING BUSTING, MCDONALD'S EMBRACES INDIAN SUMMER AND AMAZON IMAGINES ROME IN A DAY

Retailer TK Maxx is focusing on how it can help customers deal with the ongoing cost-of-living crisis with an integrated marketing campaign, launching this week. Devised by creative shop Wieden + Kennedy London, the creative will be centred around a 30-second ad that playfully pokes fun at TK Maxx's reputation for selling 'big brands at small prices'.

The fast food brand McDonald's made the most of the recent heatwave with creatives encouraging customers to cool down with one of its milkshakes. Led by Leo Burnett, the new out-of-home (OOH) billboard features McDonald's **iconic golden arches**, partially obscured and accompanied by a single drip of strawberry-flavoured milkshake. With no text, additional logo or further branding on the creative, the advert – complete with tiny beads of condensation– conveys a simple but super effective message.

Amazon Business is imagining how much more efficient the Ancient Romans would have been, if only they'd had the right business partner to help them along the way. Created by **London agency** Joint, the lavish 30-second spot re-imagines the classic tale of Romulus founding Rome in 753 BC – only this time he has the luxury of an Amazon Business account to do the heavy lifting.





# FASHION & LIFESTYLE

## STONE ISLAND'S GOT SEOUL, SIENNA MILLER: NEW FACE OF M&S, V&A: GABRIELLE CHANEL. FASHION MANIFESTO



### Stone Island's got Seoul

In September, Stone Island launched a huge archive exhibition, which coincides with Frieze Week. Titled Selected Works Seoul '982-'023: The Stone Island Archive, the exhibition will have 70 special pieces on show, including the Tela Stella cape from the brand's first ever collection, the more recent monochromatic Ventile Ghost Piece from SS11 and an entire floor dedicated to their Pure Shell jackets.



### Sienna Miller Is The New Face Of M&S – Shop Her Favourite Pieces From The Collection Now

Launched on 7 September, the AW23 womenswear collection sees Miller dressed both in seasonal, trend-led looks and timeless staples that form the foundation of any wardrobe; outerwear and smart tailoring pieces (including Sienna's favourite one - the tweed check blazer) sit alongside separates, chunky knitwear and statement accessories, blending elements of British style with bohemian and eclectic influences.



### V&A: Gabrielle Chanel. Fashion Manifesto

The V&A is to stage the first UK exhibition dedicated to the work of Gabrielle 'Coco' Chanel, charting the evolution of her iconic design style and the establishment of the House of CHANEL. From the opening of her first millinery boutique in Paris in 1910 to the showing of her final collection in 1971, the exhibition features over 180 looks and will explore Chanel's pioneering approach to fashion design, which paved the way for a new feminine elegance and continues to influence the way women dress today.



# SOCIAL MEDIA TRENDS

## FOOTBALL BECOMES 'HIGH FASHION', RALPH LAUREN JUMPS INTO THE META-VERSE, THE RISE OF PINTEREST AMONGST GEN-Z AND TIKTOK'S ENDLESS 'MICRO-TRENDS'

Adidas introduced Arsenal's 23/24 kit with a fun, new social-media campaign, which starred football players, such as Leah Williamson and Declan Rice. The kit is inspired by the "retro style" of the 1980s with visual references borrowed from Europe - from the glimpse of an Italian moped to a nod to the French new wave.

### Pinterest is becoming Gen Z's favourite fashion inspiration

Pinterest has emerged as a surprise go-to fashion destination for Gen Z, as well as a trend forecasting resource for brands and retailers. When Gen Z internet label **Jaded London** noticed Pinterest users were pinning 1990s photos of David and Victoria Beckham wearing baggy trousers, it decided to create a modern version. The brand's 'parachute pants' went viral — and Jaded has sold over 200,000 pairs since launch in 2022, worth £8.5 million in sales. The brand's founders say its design team regularly checks Pinterest to predict trends among the under 25s, drawing on its huge bank of nostalgic images from decades past.

### TikTok and the age of 'micro-trends' in fashion and beauty

This summer has seen a proliferation of fashion and beauty micro-trends on TikTok. When Hailey Bieber posted an Instagram captioned "strawberry girl summer" at the start of August, the Internet hailed her heavily blushed cheeks and nose as the hallmark of a new summer aesthetic. The trend attracted over 16 million views almost instantly on TikTok with users sharing tutorials on how they achieve the look. She capitalised on this with her Rhode beauty brand launching a collaboration with Krispy Kreme pink glazed donuts, while she showed up to the launch donning her 'strawberry girl' aesthetic.



### Ralph Lauren and the 'Race to Greatness'

Ralph Lauren ventured into the metaverse, with the launch of 'Race to Greatness', a virtual island in Fortnite. Designed to pay homage to Ralph Lauren's iconic runway shows and brand aesthetics, the island merges fashion, social gaming and exploration. At the centre, the island features a Ralph Lauren emblem-bearing foot sculpture, which they have launched in both virtual and physical forms – priced at \$250 US, with only 200 units available.



# DESTINATION SPOTLIGHT

## THE FASHION KINGDOM: SAUDI ARABIA'S INAUGURAL FASHION WEEK TAKES CENTRE STAGE



In a groundbreaking announcement, the Saudi Fashion Commission has revealed its plans to host the very first Saudi Fashion Week from 20-23 October in Riyadh. This momentous occasion marks yet another stride forward in propelling the kingdom's creative talent onto the global fashion stage. The event promises to be a spectacular showcase, featuring a diverse array of collections from brands participating in the Fashion Commission's esteemed Saudi 100 brands programme.

Under the visionary leadership of Burak Çakmak, CEO of the Saudi Fashion Commission, Saudi fashion brands have already garnered attention on international platforms such as Paris and Milan Fashion Weeks. Their remarkable talent has captivated fashion professionals and enthusiasts worldwide. Now, for the first time ever, the fashion community is invited to experience the kingdom's unique creative energy during this historic event. Saudi Arabia is poised to become the next international fashion destination.

The announcement coincided with Paris Fashion Week, where Saudi design showcases and pop-ups stole the spotlight. These events included experiential fashion shows, state-of-the-art showrooms, and a series of industry gatherings, signalling the acceleration of Saudi Vision 2030. Following substantial advancements in arts, culture and sports, the fashion industry is the next frontier, and the potential is thrilling.



# INFLUENCERS & KOLS

## ONES TO WATCH



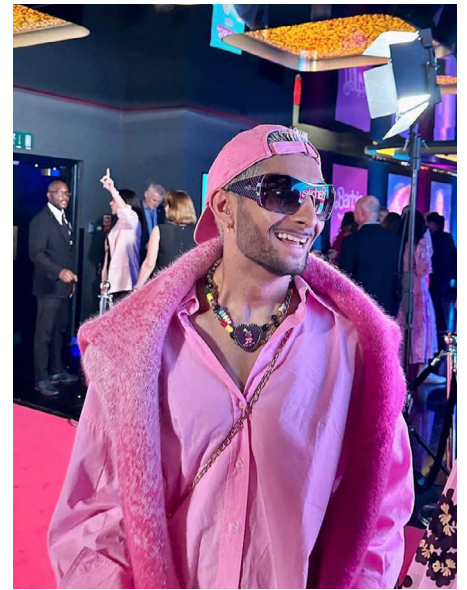
**120K Instagram Followers**

Antoinette is an innovative fashion influencer who uses creative editing, reminiscent of the Cher character's wardrobe in *Clueless*, to bring life to her outfit inspiration. Her style is trendy, allowing her to work with the likes of Converse and House of CB, as well as Primark to promote their Barbie-inspired line.



**269K Instagram Followers**

John creates aesthetic content, showcasing his vibrant wardrobe, with features on his page from his partner and his adorable son. His style is the perfect mix of luxury and streetwear, which he brings these together through unboxing designer trainers and showing followers how to style them.



**223K Instagram Followers**

Aly is a fashion influencer who dedicated his content to explaining his bold outfit choices and demonstrating how they can achieve the same look. His signature baggy trousers are a staple of his avant-garde streetwear style.

# ARTS & CULTURE

## AI INFLATABLE FASHION, IMMERSIVE SURREALISM IN MUMBAI AND PARIS HILTON & ROBLOX COLLAB

### New immersive exhibition launches in Mumbai

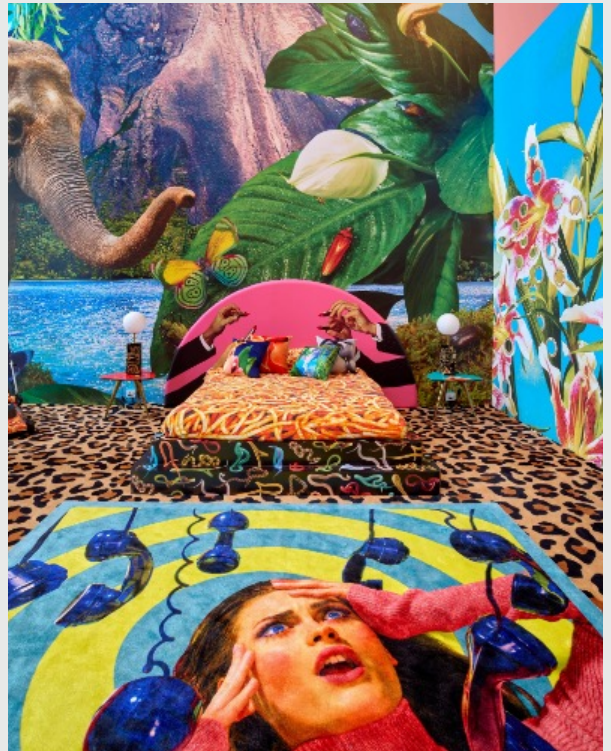
Italian creative studio, Toiletpaper, has launched a new exhibition call Run as slow as you can, which is designed to overwhelm visitors and challenge people to engage in the real world as we move ever closer to a virtual one.

### Jacquemus inflatable handbag

French fashion brand Jacquemus, launched a digital art campaign featuring a video of an inflatable handbag on the French Riviera.

### Paris Hilton and Roblox launch Slivingland

Paris Hilton has uploaded all her favourite things to her virtual 'Slivingland' on gaming platform Roblox, inviting everyone to join her "sliv inside her imagination". Watch the trailer [here](#).





# CONSUMER FINANCIAL PLANNING TRENDS

## ASSET OR ACCESSORY, BALANCING COST AND SUSTAINABILITY & LVMH INTRODUCES APPLE TAP TO PAY FOR SEAMLESS IN-STORE TRANSACTIONS



### Luxury handbags - asset or accessory?

Luxury handbags are investment assets for the wealthy, driven by potential high returns and a desire for unique holdings. **This FT article** discusses how a London-based finance coordinator expects 40-50% ROI on her £100,000 Hermès handbag collection, which she has accumulated over the years. The article also points out that wealth firms have noted a rising interest, offering diversification from traditional markets. Although mainly popular among women and younger clients, only a small portion invest significantly. Handbag prices have surged in the primary market, reflecting the trend. However, research, storage and selectivity are crucial for such investments due to evolving fashion trends.

### Balancing cost and sustainability for fashion choices

**This FT article** explores the financial dilemma posed by affordable fashion choices. It discusses the author, Jo Ellison's personal experience of purchasing an affordable yet potentially unsustainable £6 bra from Primark. The article emphasises the need for consumers to balance price, quality, and environmental impact in their fashion choices – questioning the effectiveness of categorising shopping habits as 'good' or 'bad', based solely on affordability. The author also highlights the importance of considering the frequency of wear in sustainability calculations, reflecting the evolving synergy between consumer financial strategies and environmentally conscious fashion trends.

### LVMH Introduces Apple Tap to Pay for Seamless In-Store Transactions

**This Forbes article** is about LVMH, which has launched Apple Tap to pay on iPhone in select US stores (Sephora, Christian Dior Couture, Celine, Tiffany & Co., Louis Vuitton), enabling contactless payments via advisors' iPhones, using an iOS app. This aligns with customer demand for transparent, secure digital transactions, enhancing the in-store experience. The move is part of LVMH's strategy, building upon existing client advisor tools.

# IN THE WORKPLACE

## THE RISE OF THE 'WORKCATION', SUMMER WORKPLACE TRANSITIONS AND HOW TO AVOID OFFICE GUILT TRIPS



### Gen Z's office runway

As Gen Z is transitioning from Zoom call interviews and remote working to return-to-office mandates, many young professionals are searching for ways to blend office dress codes, current trends and their own personal styles. With lots of people turning to TikTok for the best business casual fits, trends featuring combinations of typical office attire and vintage or thrift pieces are emerging.

### Wrong trouser day

The Bristol Children's Hospital Charity has announced their most unique dress-down Friday appeal of the year. The charity is encouraging corporate offices and workplaces to help raise money by having staff come to work in their weirdest and wackiest trousers. All the money raised will help to bring a smile to sick children at Bristol Children's Hospital and St Michael's Neonatal Intensive Care Unit.



### Gender identity in the office

For many people, what they wear to work is about a lot more than just personal style – it's crucial to their professional performance and how they are perceived in the workplace. Non-binary individuals are sharing their struggles with dressing in typical gender-conforming attire and how it impacts their self-worth and confidence. Testimonies have been shared by non-binary people about how dressing in a way that aligns with their gender identity is a relief and the benefits have extended to their career.





# FASHION TRENDS

## MARKS & SPENCERS ON THE RISE AND THE USE OF SMART TECHNOLOGY IN FASHION



Despite a challenging market for retailers, Marks and Spencer sees a return to growth, with their clothing and home sales increasing by 11.5% this year. M&S's success is attributed to their drift away from older style perception, to drawing in new, younger customers with trendy ranges. Other ways for brands to optimise their businesses could be investing in latest online and in-store technology to improve shoppers' experience.

### M&S sees a big rise in popularity

- Following a slight dip in interest in 2021, both search and online mention volume of M&S has increased continuously.
- They are also dominating as #1 in YouGov's BrandIndex, with a buzzscore\*\* of 15.3 – almost doubled that of Next, who came #2.
- Main followers of @marksandspencerstyle are female aged 25-34 (33.8%).
- M&S Style's Instagram audience are mainly women, aged 18-25 – clothes and family are their main interest.
- Many compliment the improvement in design style of M&S clothing.

\*\* Buzzscore = a measure of whether more consumers are hearing positive things about a brand in the last two weeks.

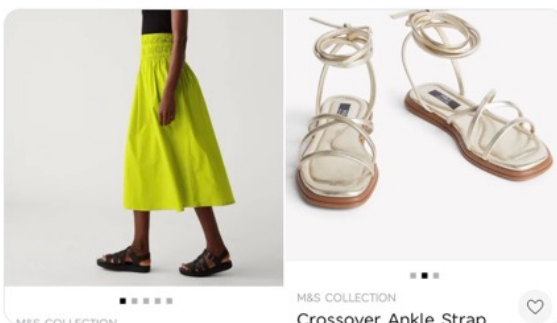
M&S shoppers are loving the versatile wardrobe 'must have'

#AFF



dailyrecord.co.uk  
M&S shoppers love 'smart but comfy' £22 jeggings 'suitabl...  
Marks and Spencer customers are raving about the versatile wardrobe must have that can be dressed up and down for ...

Much as I enjoy moaning on about Marks & Spencer, I can't really this season, I love it! tomorrow channelling my Greek widow with this (but black) skirt and mega comfy sandalés



**26K** total online mentions of 'workwear' or 'work outfit' in the last 12 months



**15%** uplift of search volume 'workwear' or 'work outfit' in the last 12 months

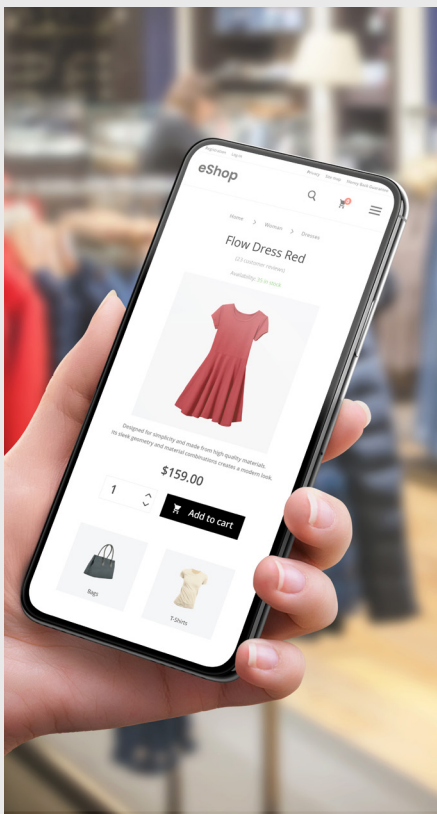
# SMART TECHNOLOGY

## IN THE MEANTIME, SMART TECHNOLOGY IS ALSO GAINING INTEREST IN THE FASHION INDUSTRY



### Virtual clothing try-on

With VR, consumers can virtually try on clothing and accessories, eliminating the need for physical fitting rooms and enabling a more personalised shopping experience. Brands such as Nike, Fenty Beauty, Zero10 and more have started using AR to allow their customers to view their products in real time using virtual technology.



### Chatbot personalisations

Chatbots have become personal shopping partners, offering recommendations and guidance to customers. These AI-powered assistants analyse user preferences, style choices, and even past purchases to suggest clothing items that align with individual tastes and current trends.



### AI size recommendations

Utilising vast datasets and machine learning algorithms, AI analyses a customer's measurements, previous purchases, and even brand-specific sizing variations to provide tailored size recommendations. Ensuring the customer gets a perfect and comfortable fit, every time!





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four