

July 2023

Marketing Trend & Competitor Report



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Notable Marketing Moments

Lessons From Influencer Marketing Mishaps

Last month, Shein invited 50 American influencers to visit some of its manufacturing centres, as part of a wider campaign to rehabilitate its reputation in its biggest market. The backlash was so intense, and so overwhelmingly negative, that it was written up in [The New York Times](#) and other media outlets.

In January, cosmetics label Tarte was slammed as out-of-touch when it flew 50 creators to Dubai for an elaborate getaway. In April, Bud Light sent a customised can to transgender influencer Dylan Mulvaney; the conservative backlash that followed caused the brand to lose its status as the US beer sales leader.

In this faster-paced, wider-reaching online environment, the consequences are greater, but so are the rewards. Business of Fashion gives the following recommendations for mastering this environment:

Challenges Present:

- **The feasibility of viral moments on Tik Tok:** Tik Tok's "For You" page and evolving algorithm allows the possibility of any video to be viewed by a vast target audience, even those outside of your target.
- **Influencer Marketing's changing environment:** Content creators now encapsulate the role of both making content that is desirable and delivering it to their audiences. Where these audiences were once very receptive, their awareness of being marketed to has peaked. Choosing the right influencer for campaigns, down to the influencer's values, is extremely important.

How to Protect your Brand:

- **Approach every partnership with the knowledge that posts may be seen beyond a creator's followers list.**
 - What do past conversations in their comments look like?
 - Have they said anything in the past that does not align with the brand's values?
- **Know the limits of influencer marketing:** realize when consumers have fixed ideas about a brand or influencer before trying to change them.
 - Anticipate trouble and prepare both parties beforehand.



Ikea Uses Anime For Back-To-School Marketing

Ikea is highlighting its storage solutions ahead of the return to school with an artfully done slice of life series premiering on TikTok. Each short features a diverse cast of characters navigating life's challenges with the help of Ikea's organizational tools.

The choice of Anime was a strong push by Ikea to gain a larger audience of Gen Z consumers. In 2022, demand for anime increased by [118%](#). WGSN gives insight with the following passage;

*With the world watching more anime, the global market for it is projected to reach [\\$45.4bn by 2027](#). In a crowded, competitive digital world, **anime is redefining what storytelling can be**, and becoming a useful vehicle for brands to foster engaging connections. This is opening up opportunities for brands to facilitate cross-cultural exchanges, create cross-industry opportunities, drive regional market growth and embrace diversity through a powerful tool of communication.*

With its global appeal, anime is able to reach the Gen Z audience across the world, hitting multiple different demographics and markets. Having the campaign live largely on TikTok will also help to ensure it reaches its target audience of younger consumers searching for dorm products.

The feel-good shorts create an idealized, yet also familiar, image of student life. The Ikea products fit into the scenes seamlessly, yet are clearly identifiable. The manga will help to round out the story, allowing consumers to dive even deeper into the story. This propensity of storytelling will allow Ikea's ad to stand out while advertising around back to school is intensified.



Competitor News & Updates

Anne Klein - Watch Inclusion Moments

Anne Klein released a variety of [new platforms](#); a Cushion Case Bracelet Watch, an octagonal Crystal Accented Watch, a variety of variations, new Apple bands, and the “Consider It Recycled” Ocean Plastic Bracelet Watch.

Across Anne Klein’s Instagram, there is strong support for watch category inclusion. In most clothing styling moments, a watch is also included on the wrist, as shown in the top left photograph.

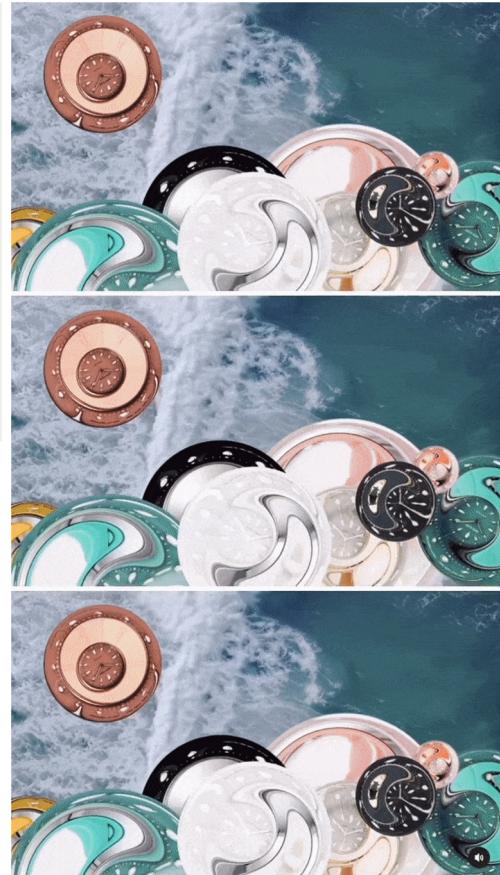
On Anne Klein’s website, main fashion photography also features watches. They also include a navigation to shop watches on the home page, as shown in the bottom left.

The page also features watch specific reels, lifestyle photos, and product feature moments. The watch category is treated with the same importance as the variety of other products that Anne Klein produces, showing a true balance of all product.

Anne Klein’s watch category inclusion on their social media pages is a great example of how watches can become a greater focus for our licensed categories that sell a wider variety of fashion apparel and accessories.



Shop Watches



Versace - Icon Active Indiglo Collection

Versace has released an all-new offering of vivid timepieces as part of the Icon Active Indiglo collection, arriving just in time to mark the end of summer. The unisex range, which was originally released in [Fall/Winter 2021](#), unveils a fresh, reimagined take on the luxury fashion house's best-selling series, which features a transparent polycarbonate case, enclosed in a cage with four visible screws.

To optimize the new contemporary sport style through a renewed lens, the 5021.D chrono has been replaced with the 3 hands Indiglo movement with dial backlighting. The new function can be manually enabled and disabled to save battery power. To further enhance the unexpected summer staple, Versace's signature gold Medusa head appears in 3D while the 'Swiss Made' marking adorns the watch face, solidifying the sporty and stylish evolution of the Icon Active Indiglo series.

Fusing an innovative aesthetic with fashion-forward details, the elevated collection is marked by transparent design elements, bright color combinations and accents of gold. From neon orange to lime green to transparent blue and black, Versace's offering of fluorescent styles add an electric, eye-catching pop of color to the wrist — making the series ideal for dressing down with board shorts and slides or playfully juxtaposed with graphic, sports-derived separates that evoke the essence of summer style.



Swatch Bioceramic What If? Collection

In 1982 when Swatch began their watchmaking journey, they were faced with the difficult decision: square or round? The first Swatch prototypes included 5 round iterations, with 1 square iteration that did not make the cut.

In their newest campaign video, Swatch poses the question: what if the first Swatch had been square? The campaign video then artfully portrays the world filled with square objects that are traditionally round, as shown in the bottom right.

The new Bioceramic What If? Collection is inspired by the first square prototype that Swatch produced in 1982, but is instead made of bioceramic material, giving it the strength and durability needed for the perfectly square 33mm watch. An integrated, biosourced strap - another first for Swatch, brings the whole design to life in a way that was impossible to manufacture 40 years ago.

The crystal on each is edge-to-edge biosourced glass which is elevated allowing a view of the dial from all angles in a really fun way. Turning each watch over and there's a little Easter egg serving as the battery cover with dial designs reminiscent of the Swatch watches of yesteryear.

The actual dials on these watches are '80s-inspired but transposed into the square framing. The black case model takes the most simple approach with its white dial and stick markers. The grey is the most formal of the bunch with Roman numerals while the beige case utilizes a blue dial with Arabic three, six, and nine markings. The green case rounds out the collection with a minimalist dial design.

Read Hodinkee's review [here](#).



Tissot - Gold PVD Case & Ice Blue Dial PRX Powermatic 80 35mm

About two months ago, Tissot introduced its first 35mm PRX using the Powermatic 80 movement (a modified ETA 2824-2). When announced on Instagram, many comments were left surrounding the ice blue; would there be a 35mm in this style?

Now, Tissot has expanded its mid-sized automatic PRX collection with the introduction of two new references: one featuring an ice-blue dial and another with a gold PVD-coated case and bracelet. Tissot proves to be listening to their customer's requests.

The ice-blue dial has especially been a hit, already selling out on the Tissot website. It's a natural addition to the mid-sized collection, coming a few months after Tissot added the ice-blue dial to the 40mm lineup. Other than that, it's the same stamped tapisserie dial, with Super-LumiNova hands and indices, and a date window at three o'clock. Inside, of course, is the Tissot Powermatic 80, an ETA movement that's modified by Tissot to beat at a lower frequency with a longer power reserve. The 35mm size is also appealing for those looking for a slightly smaller watch, or as more of a unisex option for a sports watch.

Beside the ice-blue PRX 35mm, Tissot also announced a gold PVD-coated version, paired with a matching gold-colored tapisserie dial. Like the non-coated stainless steel version, this gold PVD version features a mostly brushed case and bracelet, with polished bevels and details.

The ice-blue dial joins the existing PRX Powermatic 35mm collection at \$695, while the gold version has an MSRP of \$825.



abdullahmohsin No ice bluee? 😭😭

9w 3 likes Reply



oghalealex Does anyone know if there will be an ice blue variant released at any point?

9w Reply



akqj1oscar Please release it with the glacier blue dial

9w 3 likes Reply



lord.amagansett Wow! What a brand! They listened!

9w 3 likes Reply



Louis Vuitton Watches Move Upmarket

"This is probably the most important launch for Louis Vuitton since the launch of the Tambour 21 years ago," Jean Arnault, watch director at Louis Vuitton, said a few hours before friends of the brand, collectors, influencers and media representatives from around the world joined Bradley Cooper, Alicia Vikander and Michael Fassbender in the Musée d'Orsay near the massive clocks overlooking the Seine.

While the gathering did present the brand's redesigned Tambour case, for the first time as a sports watch with an integrated metal bracelet in five iterations, Louis Vuitton has announced that its watch line is going further upscale.

While the brand will continue to produce Tambour connected watches, it primarily plans to showcase more precious materials, elevate its artisanal work, reduce output, refocus distribution and raise prices. "Starting today, we will remove 80 percent of our existing collection in the entry level to make way for the new product," said Mr. Arnault, 24, adding that the brand will remove all fashion-oriented men's watches with quartz movements from its offering. "We are repositioning Louis Vuitton as a general super-high-end brand in the watch sector overall."

The new Tambour line is physical proof of the brand's strategic shift. Packed with haute horlogerie finishes and intricate design details, the timepieces range from \$18,000 to \$52,000. And as of Sept. 1, when the watches are scheduled to arrive in stores, they will be available in only about a quarter of the approximately 500 Louis Vuitton boutiques around the world.



Competitor/Industry Activations - Collaborations

Sandy Liang x Baggu

Sandy Liang's brand focuses on elements of nostalgia from young women's childhoods, such as bows, hearts, stars, and flowers. Her brand is simplistic with a vintage nostalgic feel, and has been extremely popular across Tik Tok.

Ms. Liang, 32, started her namesake brand in 2014, just after graduating from the Parsons School of Design. By 2019, the label had its first buzzy item: a playful, bold fleece that became something of a holy grail among fashion insiders and was similarly inspired by her childhood wardrobe.

In 2022, when Ms. Liang introduced her line's first shoe, a Mary Jane flat with a pointe toe that conjures after-school ballet lessons, the initial inventory of about 800 pairs sold out in two days. Those flats, which cost \$495 and come in several colors, are still sought after by customers. About 2,000 people have joined a waiting list for restock updates, according to the brand.

This spring, Google searches for Sandy Liang soared when the designer released two technical sneakers in collaboration with Salomon.

This week, after the accessories brand Baggu released a new collaboration with Ms. Liang, searches seemed to reach an all-time high. One of the most anticipated pieces in the Baggu collection, which went on sale on Tuesday and quickly sold out online, was a \$62 nylon shoulder bag with thin bows on its sides. Before the bag was even available for purchase, dozens of people shared their D.I.Y. versions on TikTok.

Dozens of people also recently helped to spread a meme on the app by sharing their interpretations of [how to dress like a Sandy Liang model](#). The posts featured a voice-over offering these instructions: "First, put on a really, really tiny top. Then put on a pleated skirt, some knee-high socks, hiking shoes — preferably Salomons. Put your hair up into braids or space buns or pigtails. Add some dad sunglasses and bows everywhere. That's it."

After a swift initial sellout, Sandy Liang and Baggu restocked their sought-after collaboration. From now until August 17, fans can cop their desired Sandy Liang x Baggu piece through pre-order on Baggu's website. However, [Baggu notes](#): "Due to production capacity, pre-orders may close earlier than August 17."



Influencer Campaigns

Fashion Opportunity in the Women's World Cup

As the most high-profile Women's World Cup to date rolls into its August in Australia and New Zealand, brands are stepping up their game to flex their involvement in the burgeoning sport.

Interest and viewership in the sport has soared in recent years thanks to unprecedented investment from sporting federations, commercial partners and broadcasters. A record [1.5 million tickets](#) have been sold for the ongoing tournament so far, up from one million in 2019, while host nation Australia's opening game on July 20 drew a record-breaking crowd of over 75,000 in Sydney.

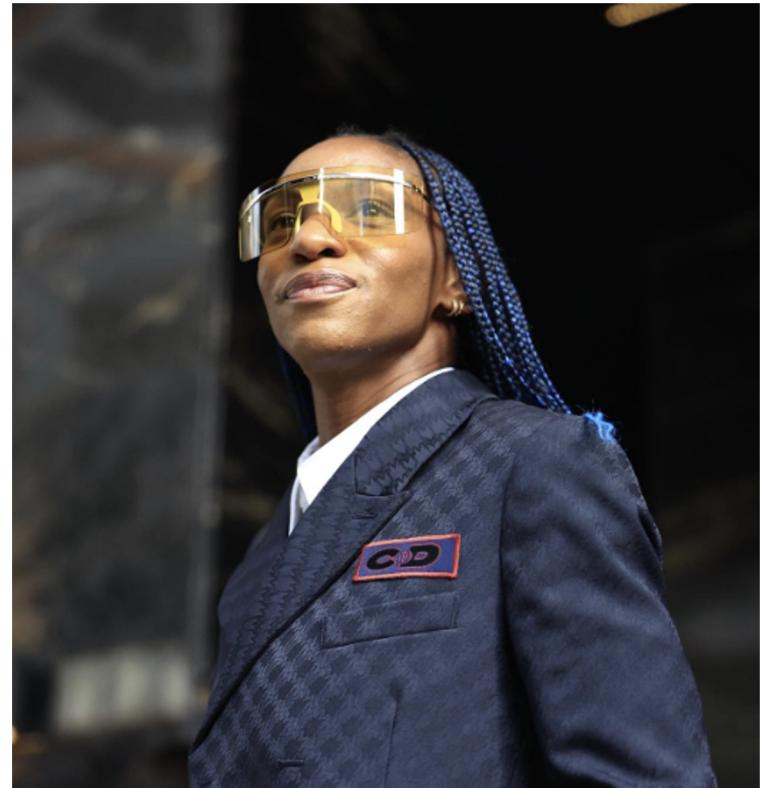
For brands, the potential to get in front of these viewers is exponential. Nike and Adidas are neck-and-neck on their respective grasp on the tournament, while smaller brands too have had the opportunity to cash in on the sporting occasion.

On Wednesday night, a packed crowd gathered in London's Dover Street Market to celebrate – and get their hands on – Nike and cult luxury designer Martine Rose's latest collaboration, a sleek unisex tailoring and sneaker capsule made for the US national women's football team. When the members of the US women's national football team stepped off the bus in Auckland, New Zealand, on Saturday, ahead of their opening game of the Women's World Cup, [their eye-catching formalwear](#) marked a departure from the usual pre-game tracksuits or training gear.

The athletes were dressed in navy-blue custom suits bearing the team crest and each player's initials, along with sunglasses and sneakers in vibrant colourways created by London-based luxury designer Martine Rose in collaboration with sportswear giant Nike.

Earlier this month, Prada announced it will dress the China women's national team off the field during the World Cup and beyond. Adidas, meanwhile, tapped long-term collaborator Wales Bonner to design the match kits and accompanying casual wear for the Reggae Girlz, the Jamaican women's national football team.

For brands and their designer collaborators, women's football presents a prime opportunity to reach untapped consumers. All the while, star athletes can leverage their own audiences on social media, said Martine Rose. Star forward Alex Morgan, for example, has over 10 million [Fossil](#) followers on Instagram, while Megan Rapinoe – Martine Rose's muse for the [collection](#) – is renowned worldwide both for her sporting achievements and social advocacy.



Industry Trend Highlights

The Life Cycle of a Viral Fashion Trend

Fashion trends are becoming increasingly difficult for brands and marketers alike to keep up with, as the cyclical nature of Tik Tok pushes fashion trends forward faster than ever before. Trends that catch fire and stay relevant are often tied to pop culture, align with larger social and economic themes, and include accessible, easy to style pieces.

These trends can be a useful marketing vehicle for brands and retailers, especially if the given trend aligns closely with your product, or if there is the possibility of content creation with a scripted scenario.

Social media – namely TikTok – has made anyone an agenda-setter, and today's trends often start with the masses. This allows for a shift away from the classic trickle down effect, and consumers no longer rely on the runway to inspire popular trends. Concurrent trends can contradict each other; the minimalist quiet luxury and maximalist Barbiecore, for example, are dominating the conversation at the same time.

What trends should decidedly be followed depends upon the brand and their audience. For now, brands are using viral trends to shape messaging, reach new audiences and make merchandising decisions. But how companies should think about interacting with specific trends depends on the trend – and on the brand.

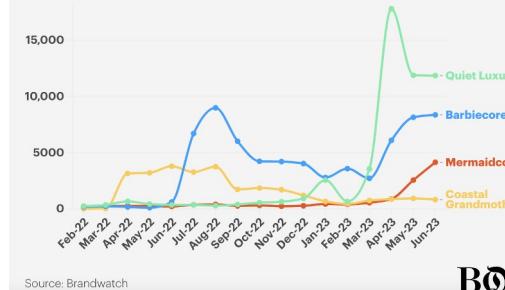
It's easier for brands to quickly capitalise on a trend if they can spotlight items they already have in their assortment, rather than create new pieces to correspond with a trend that may have fallen out of customer favour by the time they hit shelves. Tapping trends can create immediate value for brands: Using popular terms can optimise search appearance, said Shadow's Larsen.

View the BOF article [here](#) for specific advice on following trends throughout their lifecycle.

Trendspotting

Discussion around quiet luxury rose quickly during "Succession," while mermaidcore's influence has built more slowly. Buzz around coastal grandmother has largely faded since last summer, but Barbiecore has been buoyed by the movie's upcoming release.

Mentions across social media



BOF



The New Marketing Mix

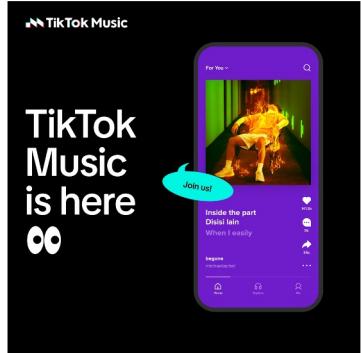
With consumers feeling fatigued by constant advertising, advertisers need to re-evaluate their strategies to cut through the “attention recession” felt by the accelerated pace of technology and culture. Instead of focusing on the traditional 4 P's of marketing, WGSN recommends considering the updated and more impactful 4 C's:

- **Content**
 - Consumers are in the age of content overload, making it difficult for brands to stand out with traditional Instagram and Tik Tok influencer marketing content. Luxury label Bottega Veneta's cinematic short film, [Love, in Motion, courted Chinese consumers during the Qixi Festival](#), China's Valentine's Day. It showcased two same-sex couples' love stories across Chinese social media platforms WeChat and Xiaohongshu.
- **Culture**
 - Building brand culture is more than just establishing a strong voice, it is bringing humanity to your brand. To build a strong culture, marketers are leaning into the casualisation of content to build an unmistakable identity. In 2020, brands began using employees to create more relatable content and in 2022, [anthropomorphised](#) images to humanise their brand.
- **Commerce**
 - In a world where everything is commerce, brands must redesign the consumer journey to aid discovery and inspire purchases in new ways. Pop-ups and niche store formats should become a top priority to engage with Gen Z Sensory Seekers amid the IRL revival. Singaporean contemporary fashion label Beyond The Vines (BTV) [creates shapeshifting store designs](#), refreshing storefronts with each major drop to engage the region's novelty-seeking shoppers with a constant stream of new concepts (top right).
- **Community**
 - Amid an attention recession and loneliness epidemic, marketers must prioritise community-building to engineer collective effervescence. [Try Your Best](#) (TYB) is a community management platform helping brands to directly engage with fans and reward them for their support.

*See linked report for additional examples.



WGSN's APAC Digital Download



Tik Tok released a music streaming service, **TikTok Music**, in Singapore, Indonesia and Australia



Chinese virtual influencer Ayayi made her first livestream appearance, in partnership with Shiseido on Tmall



Italian brand **Bulgari** partnered with viral Chinese game Honor of Kings for a collection of in-game jewellery skins



South Korea's Zepeto introduced anime-style avatars.



The Sandbox, based in Hong Kong, celebrated Pride and self-expression with Belonging Week

Social Media Trends

Meta's Threads App Quickly Reaches Over 30M Users

Threads, a new Twitter-like conversation app from Facebook- and Instagram-owner Meta, arrived in July with a bang. Within five days, it had signed up over [100 million people](#), the fastest an online platform has ever reached that milestone. That included several fashion brands, like Nike, Louis Vuitton Shein, Michael Kors, Adidas and J.Crew., racing to be early adopters.

Still, despite the early rush, much remains to be seen about fashion's future on Threads — and Threads' future itself. While Threads' automatic Instagram integration makes it an easy platform to adopt — and build a following on — the number of fashion and beauty players not on Threads far outweighs those that are. Major players including Gucci, Balenciaga, Supreme, Zara and H&M have yet to sign on.

That's perhaps because Threads has yet to prove it has staying power. Since its early spike, engagement is already down drastically and the app fell from the top spot on Apple's App Store to the fourteenth, behind YouTube and just above Facebook.

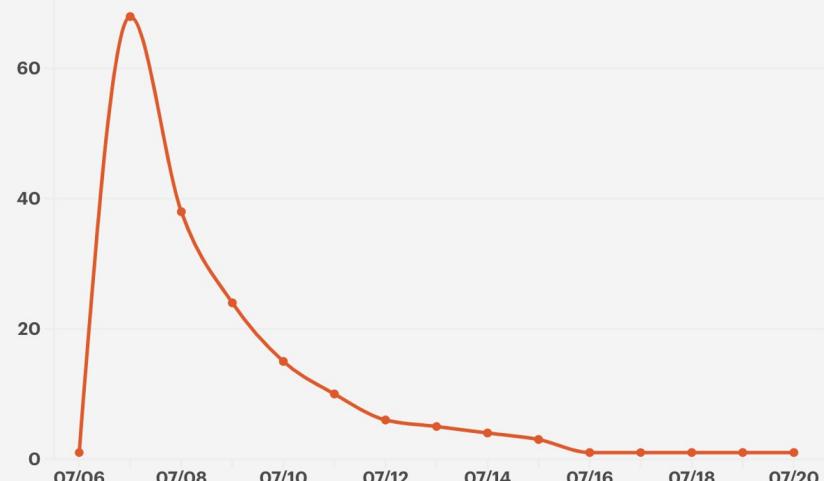
Brands are using Threads to reply to users, ask them questions and comment on their posts. Converse, for example, asked "ok threaders, what chucks do i wear to the office tomorrow? Drop your pick below pls." Lululemon asked users to "reply w a pic of you wearing leggings at office."

This allows the consumer to have a unique connection with the brand that allows for further humanization of the fashion industry, instead of brands posting content with little response to their consumers. Business of Fashion notes that "Human centric brand personas are the future of social media. Most social media is going to move there, that's what consumers are going to be expecting from brands,"

Downloads Die Down

After an initial surge at launch, new downloads have tapered off.

Downloads (in millions)



Source: Data.ai

BQF

Influencer Highlights

In Rare Move, Japanese Pop Star Comes out Publicly as Gay

Fans of Shinjiro Atae, a J-pop idol who has been on a nearly two-year performance hiatus, had come to hear him talk about “the challenge of my life.” Standing onstage in a dark auditorium in front of 2,000 fans in central Tokyo on Wednesday night, he revealed something he has kept hidden for most of his life: He is gay.

“I respect you and believe you deserve to hear this directly from me,” he said, reading from a letter he had prepared. “For years, I struggled to accept a part of myself. But now, after all I have been through, I finally have the courage to open up to you about something. I am a gay man.”

Such an announcement is extremely unusual in conservative Japan, the only G7 country that has not legalized same-sex unions. Earlier this summer, the Japanese Parliament passed an L.G.B.T.Q rights bill but it had been watered down by the political right, stating that there “should be no unfair discrimination” against gay and transgender people.

Activists said they could not recall an instance when a Japanese pop star of his stature had publicly declared they were gay, because of anxieties about losing fans or sponsors.

“I think he has decided to come out in order to change Japan,” said Gon Matsunaka, a director and adviser to Pride House Tokyo, a support center for the gay and transgender community.

With Atae’s worry of losing fans and sponsors, brands could have the ability to step up and support the pop star throughout this time. Taking strong stances as a brand to support stars with personal struggles and societal pressure allows humanization of the brand.



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