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SUSTAINABILITY

APRIL 2019

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SUMMARY

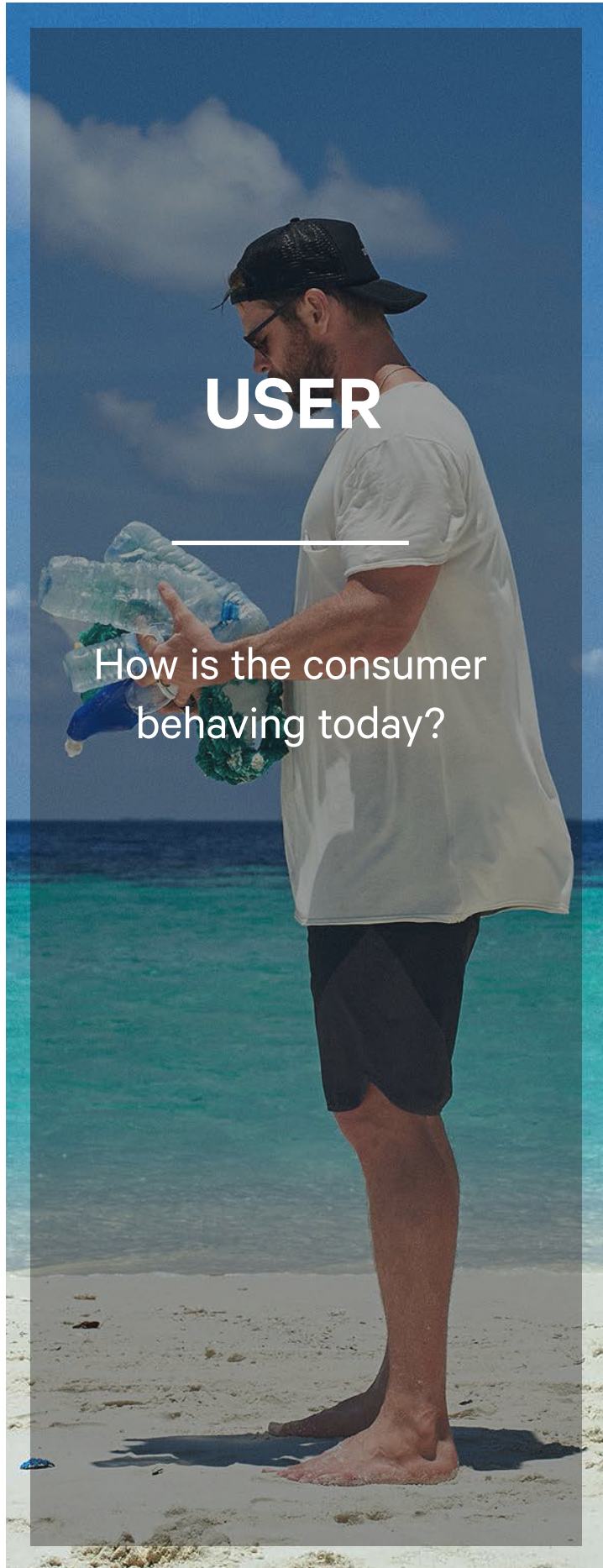
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INSIGHT

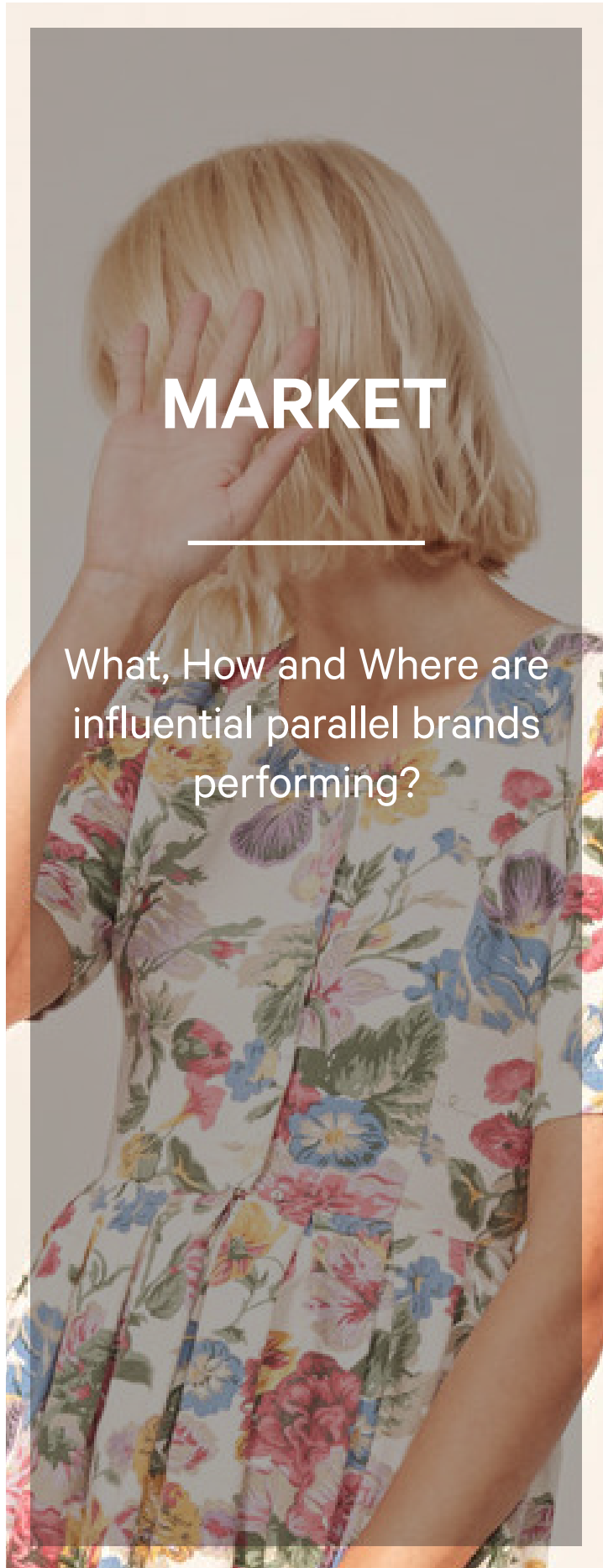
As an agency we collectively source, experience and share insight on a local and global scale. This strategic approach gives us a detailed understanding of your core consumer's behaviour & lifestyle.

Our insight pillars serve as a 360° lens to enlighten and inspire our collaborative process.



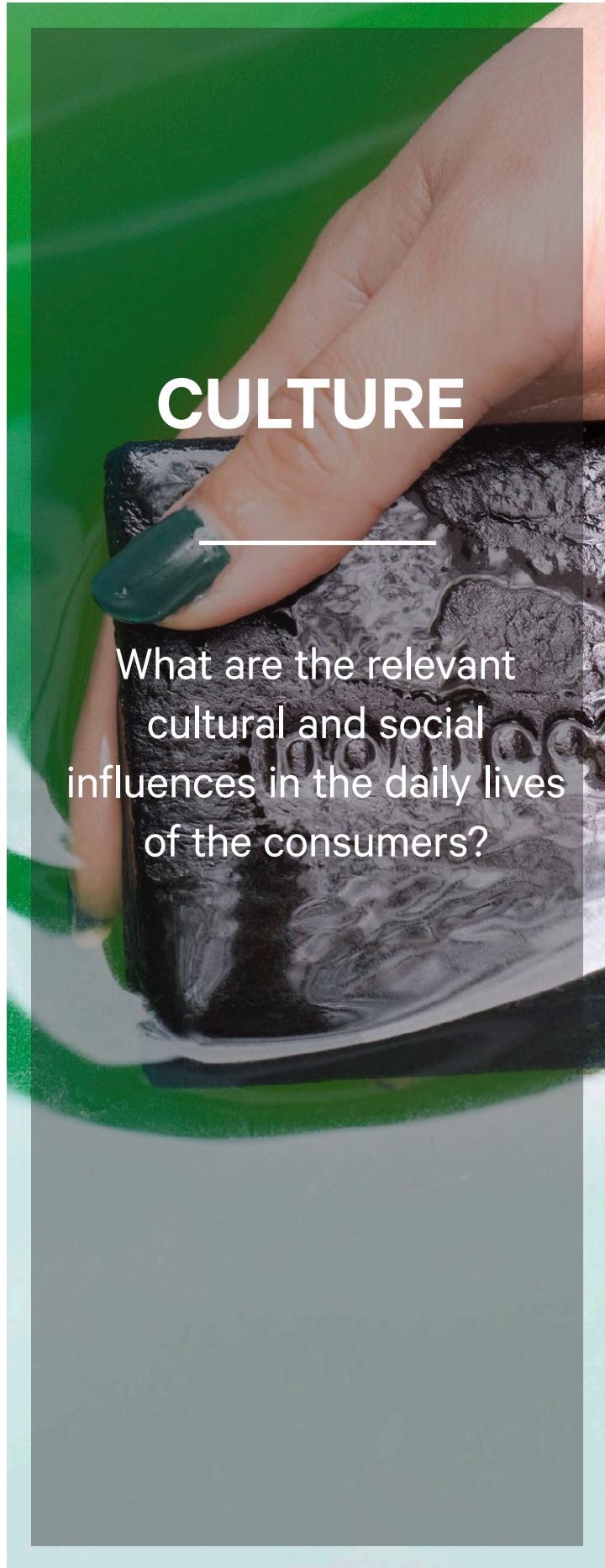
USER

How is the consumer behaving today?



MARKET

What, How and Where are influential parallel brands performing?



CULTURE

What are the relevant cultural and social influences in the daily lives of the consumers?



CONTEXT

What are the relevant macro trends in styling, materials and services that we can apply to future proof your retail activations?

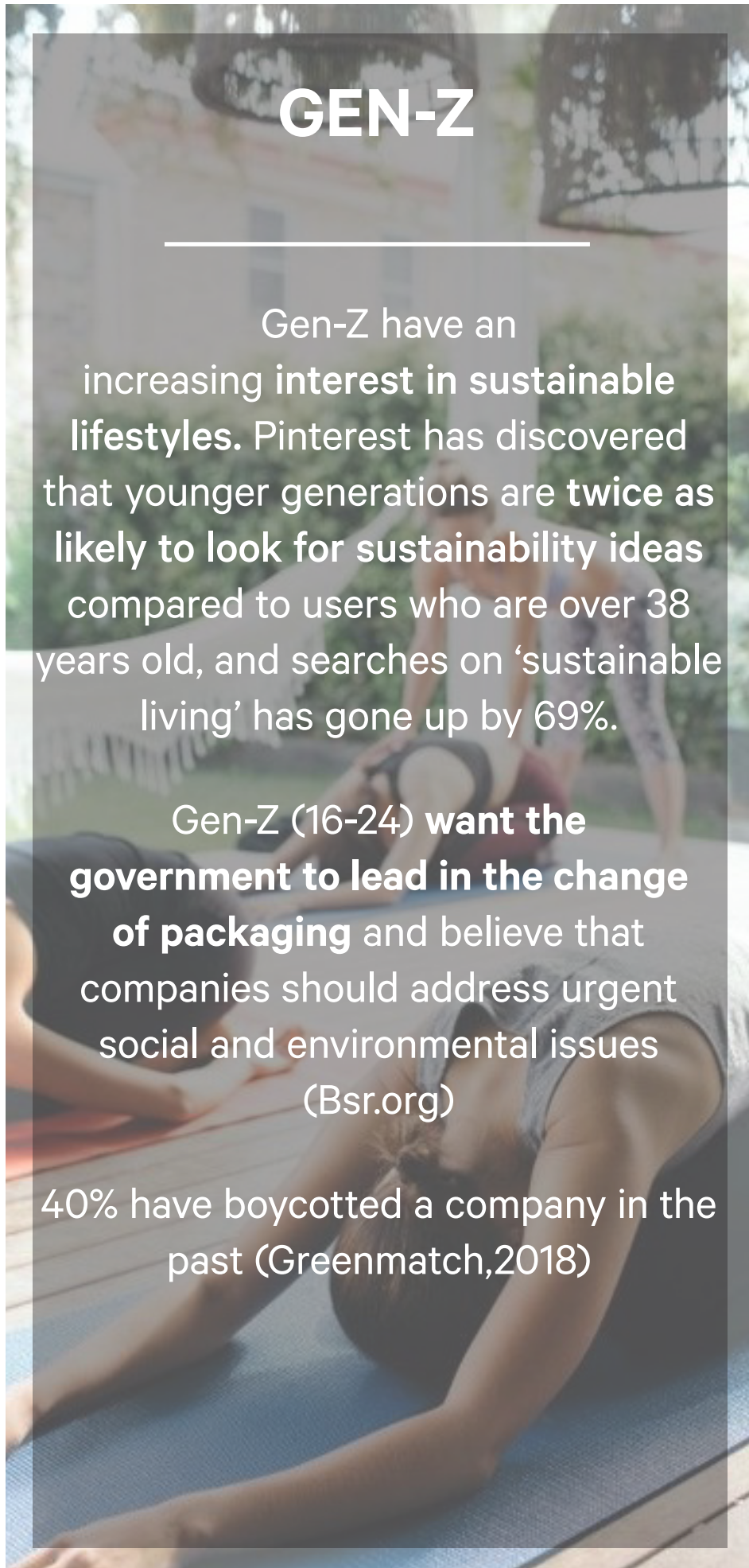


TECHNOLOGY

Where is technology being used to empower brands in creating human centric conversations with consumers?

Environmental issues are heavily influencing consumers' purchasing behaviours.

USER



GEN-Z

Gen-Z have an increasing interest in sustainable lifestyles. Pinterest has discovered that younger generations are **twice as likely to look for sustainability ideas** compared to users who are over 38 years old, and searches on 'sustainable living' has gone up by 69%.

Gen-Z (16-24) **want the government to lead in the change of packaging** and believe that companies should address urgent social and environmental issues (Bsr.org)

40% have boycotted a company in the past (Greenmatch,2018)




MILLENNIALS / YOUNG FAMILIES

Often coined the “Green Generation”, millennials are regularly considered to be the ones driving the sustainable movement with their lifestyle and behavioral changes.

Millennials are both **incredibly wasteful and sustainability-minded**. They are the most impulsive generation when it comes to shopping, and typically **discard items after 1-5 wears**.

77% of them say they prefer to buy from environmentally-conscious brands and they are **“more likely to switch to thrift for environmental reasons.”** (Fashionista)



GEN X

For older people (65 and up), **48% think manufacturers should lead the change in packaging.** (TNS)

55% of Gen X agree that they would pay more for eco-friendly products (globalweb) and 34% of Gen X would like to see more eco friendly fabrics used in clothes (guardian)

“93%

of global consumers expect more of the brands they use to support social and environmental issues”



User Analysis

Consumer Profile

The plant movement

Younger generations are adopting plant-based diets due to their increasing consciousness of animal welfare, personal health and their ecological footprint. 44% of Gen Z's say being vegan is cooler than smoking. **Beyonce and Jay Z** were offering up free concert tickets for those who commit to veganism and this movement has also crossed over into apparel. **Stella McCartney** teamed up with **Adidas** on a leather-free vegan edition of its classic Stan Smith shoe. **Dr Martens** have developed their vegan product line and brands like **Kooples** are proudly displaying PETA's approved vegan logos on their packaging.

Honesty & transparency

Consumers are demanding transparency and authenticity from brands more than ever. **Patagonia** demonstrated this with a bold statement on their website on Black Friday — 'Don't buy this jacket', stating that, "Everything we make takes something from the planet we can't give back". Transparency is one of **Oatly's** biggest core values. The oat drink company create honest and cheeky advertising that is humorous and appealing to the health conscious millennial market. Their consumers are savvy people that can make up their own mind about what products to buy.

Sense of community

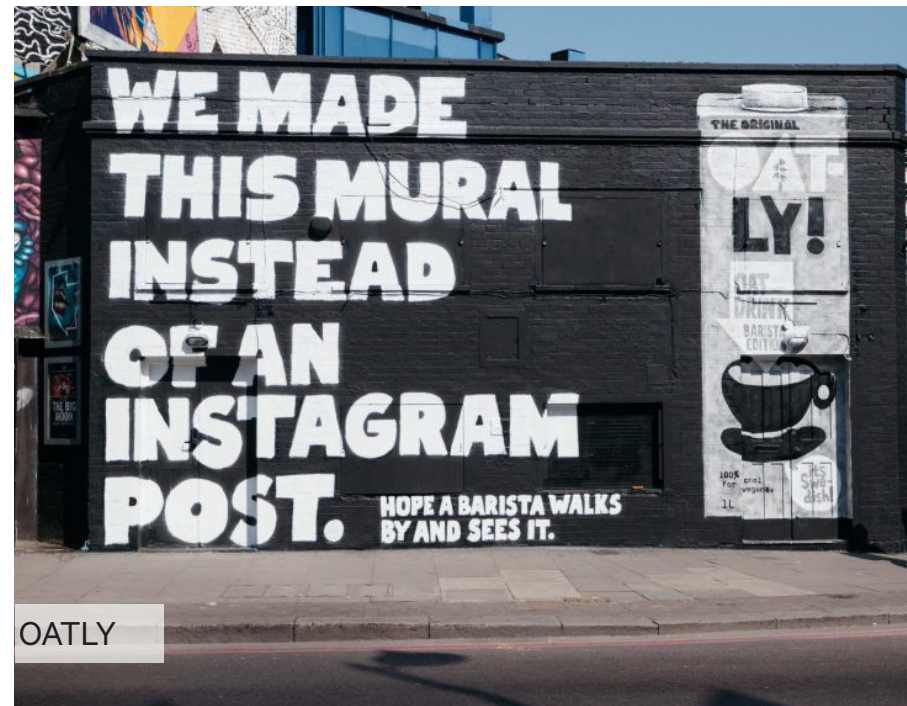
Millennials are eager to feel part of a community, providing themselves with a sense of belonging, social connectedness and positive effect on their emotional well-being. **Rapha** invites anyone to come and ride with them every week and their shops are more like "clubhouses". **Nike** take this idea further with their Run Club which allows people to connect with fellow runners in their city to run together. In a co-created miniseries, **& Other Stories** and the L.A. City Municipal Dance Squad created a community around dance, committing to challenge themselves and all of us to be bold and explore our weird sides through dance.

Key take aways:

- Connecting through creating communities
- Socially conscious consumers
- Intelligent shoppers



RAPHA CLUBHOUSES



OATLY



NIKE RUN CLUB



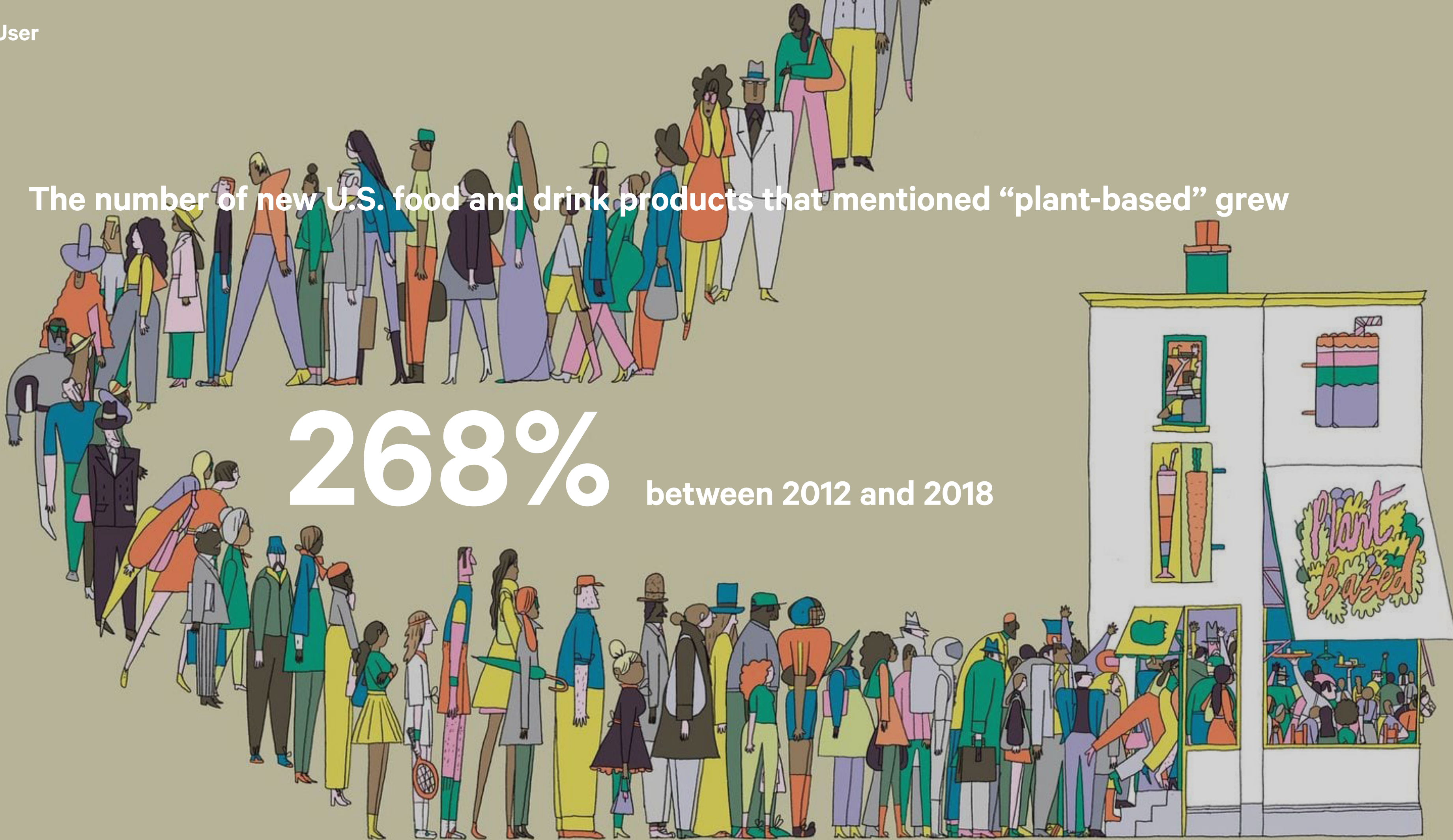
STELLA MCCARTNEY X ADIDAS VEGAN STAN SMITHS



& OTHER STORIES X #DANCINGSTORIES

The number of new U.S. food and drink products that mentioned “plant-based” grew

268% between 2012 and 2018



MARKET

retail's answer to WeWork

‘WeMarket provides the only feasible solution for young designers who want to “own” their own store. Sharing allows them to minimise individual risks while maximizing their reach.

Market Insight

Parallel market activity

Marketplace

As conversations around sustainability continue to grow, the resale market has erupted. According to Thredup, the resale market will be worth \$41bn by 2022. **The RealReal** retail shop will repair or resell your used items. Their new store on Melrose Avenue has introduced a huge audience of people that never consigned before. Luxury handbag reseller, **Rebag**, has also opened five stores in the past year — merchandised like a high-end boutique, stores are beginning to destigmatise online thrift and reinvent the thrift store.

The Circular Economy

The Circular Economy is being marketed as a guilt-free solution to consumerism. 58% of millennials in London are interested in renting clothes, according to a study by Westfield. For millennials, experience over ownership is the new norm, and with far less spending power, clothes ownership may soon be seen as an unnecessary luxury of their parents' generation. **Rent the Runway** and **Higher Studio** have positioned themselves as sustainable alternatives to fast fashion. Both offer curated high end fashion available through rentals and subscriptions — a cost effective and convenient solution to satisfying a social media-driven constant desire for newness without contributing to the negative environmental impact of buying disposable fashion.

Alternative brick-and-mortar

Brick-and-mortar retail is evolving to fit the needs of retailers and consumers. **Appear Here** and **WeMarket** provide a feasible solution for young designers to have their own store without the individual risks. Online retailers are investing in physical spaces to generate hype and exclusivity. **Amazon's** Home of Black Friday London pop-up store allowed customers to view products using the AR reality feature before buying via the app. Digital-first retailer **Depop** have opened up experiential hubs in LA and New York which act as physical manifestations of the brand, to showcase what's available on the app, act as community hubs, content studios and marketing vehicles.

Key Takeaways

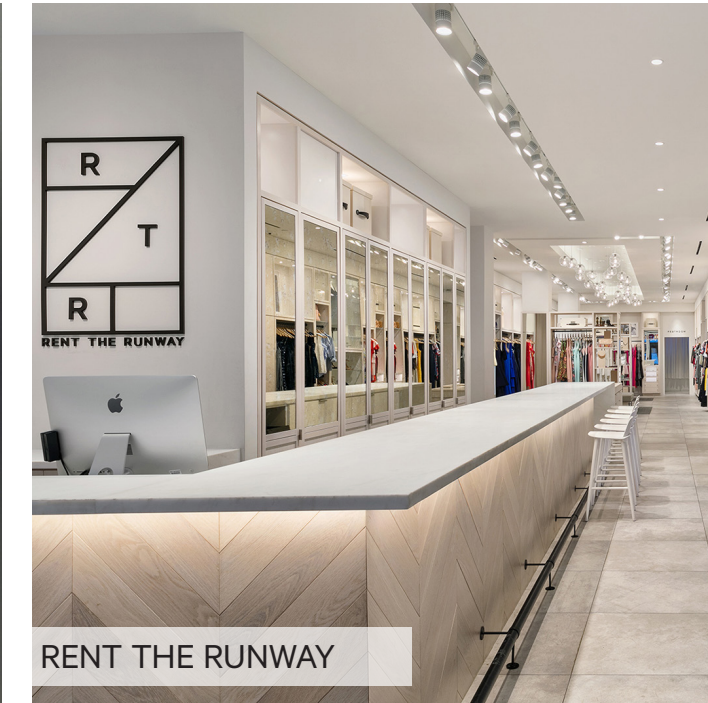
- High-end thrift
- Curated fashion through rentals and subscriptions
- Experiential hubs



DEPOP'S LOS ANGELES SPACE



HIGHER STUDIO



RENT THE RUNWAY



THE REALREAL MELROSE STORE



AMAZON BLACK FRIDAY POP UP

The Future of Fashion is Circular

Stella McCartney became the first big proponent of reselling in the luxury space by partnering with The RealReal to encourage her customers to resell her designs when they're done wearing them, giving them \$100 in credit at her stores in return.

CULTURE

Lush Naked Shop

“Reducing packaging is something Lush has been working on for many, many years. From the very first day over 20 years ago, our products were naked, but now we see a bigger movement against plastic and against waste. Alongside that, now we are able to fill up a whole shop with skincare, bodycare, hair care and bath bombs, while still providing that five star experience.”

Culture

Luxury upcycling

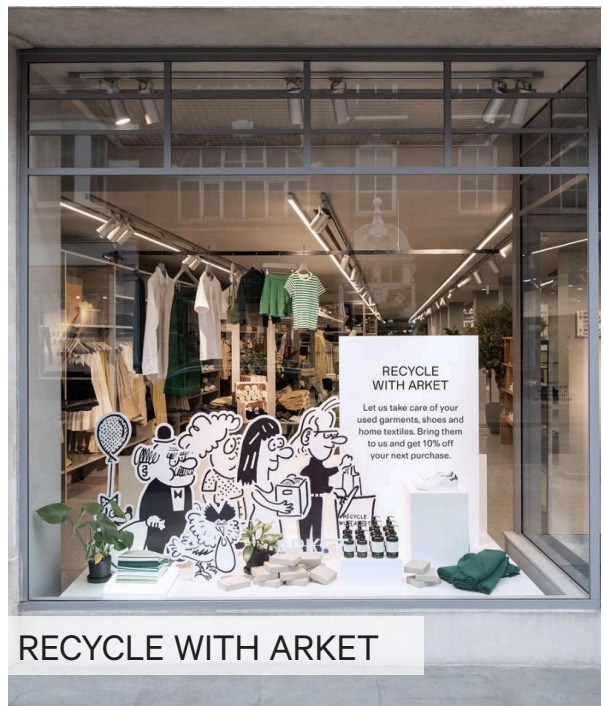
Luxury brands are drawing attention to the environmental impact of the fashion industry by transforming waste materials into desirable creations. **Elvis and Kresse** create recycled luxury accessories from London's damaged decommissioned hoses and also hosts events and workshops, engaging and educating their consumers whilst also providing them opportunities to create their own personal products. **Clean Waves**, a recent project by **Parley for the Oceans** in partnership with luxury retailer **Net-A-Porter**, transformed upcycled plastic debris collected on islands, coastal communities, beaches and oceans into a limited-edition collection of sunglasses. 100% of the proceeds fund the cause and every pair has unique GPS coordinates, that link to a specific island and progress towards its protection.



ELVIS AND KRESSE



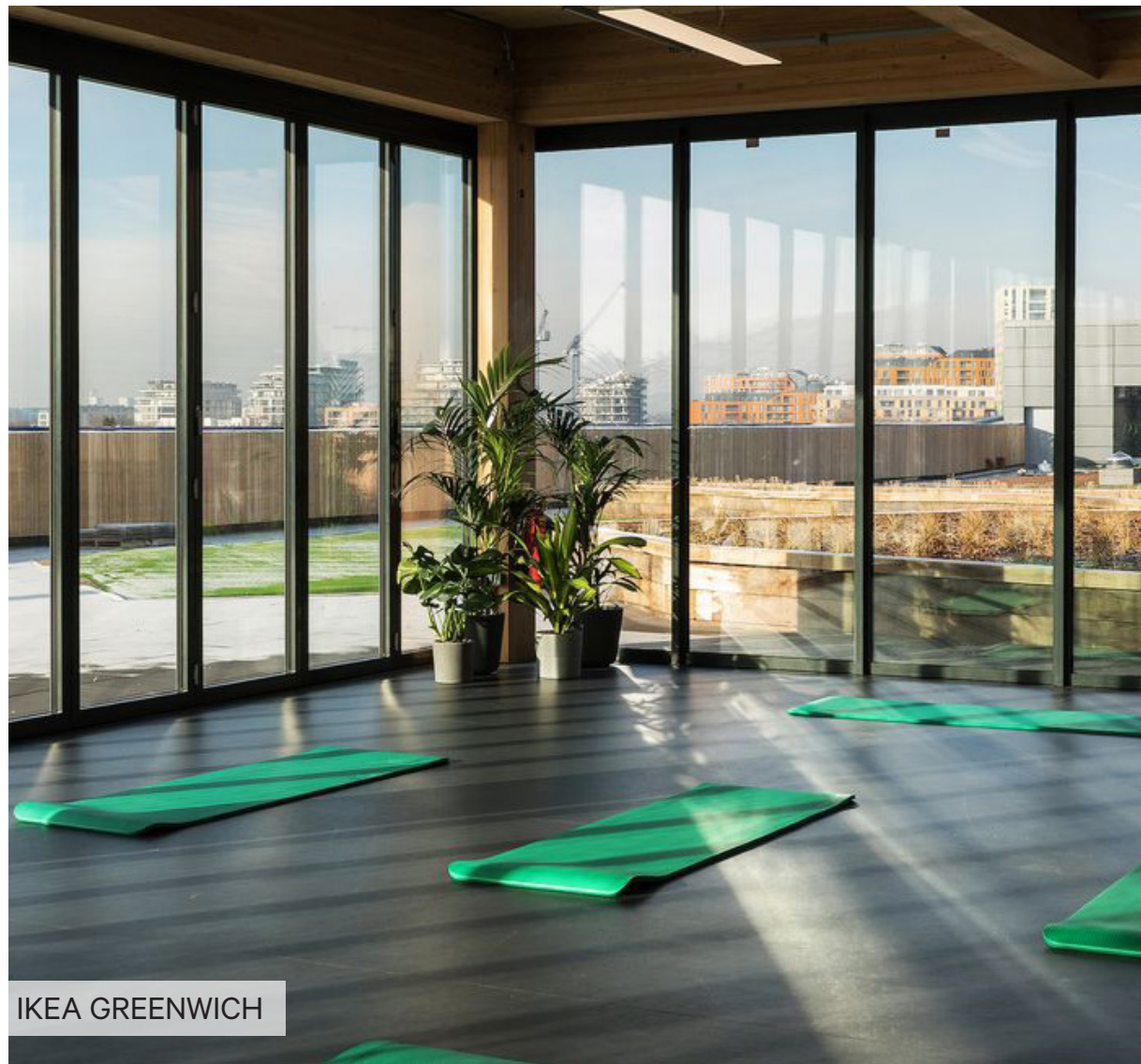
UPCYCLE | REFORMATION X THREDUP



RECYCLE WITH ARKET

Wellness

The new Greenwich **IKEA** store proudly owns its sustainable approach and the design of the building incorporates a number of green technologies. The store utilises natural light, making for a more green and efficient space, whilst also benefiting the wellbeing of the consumers. The rooftop pavilion offers wellness yoga and meditation classes. Skincare brand **Haeckels** create the most effective natural products from sustainable resources as well as inspire and implement solutions to aid our planets ocean crisis. They reward everyone who helps keep the coastline clear of litter, rewarding customers with a facial cleanser, exfoliant powder or beard oil free of charge.



IKEA GREENWICH



HAECKELS

Loyalty schemes

Brands are building deeper connections with their consumers by offering authentic loyalty schemes that provide benefits as well as fall in line with their morals. **Thredup x Reformation** have teamed up to create a sustainable loyalty programme which allows consumers to send their used clothes and accessories of any brand to Thredup and earn shopping credit to Reformation, a brand already dedicated to minimising its environmental footprint. **John Lewis** are also offering a similar buy back scheme and **Recycle with ARKET** also offer a reward for your contribution for your next purchase in their stores or cafés.

Key take aways:

- Consumer engagement and product takeaway
- Practical workshops and wellness classes
- Product education and convenience market

Clean Waves x Net-A-Porter

Created with Ocean Plastic[®], upcycled plastic debris collected on islands, coastal communities, beaches and oceans



CONTEXT

“Elena Amato has created sheets of bacterial cellulose with paper-like qualities as a sustainable alternative to the plastic packaging used in personal care products... Made from renewable resources the material also grows quickly, as well as being

fully compostable and
vegan”



Context | Surfaces

Trend Analysis

‘Modern type of Terrazzo’

Dutch designer **Simone Post** has collaborated with sportswear giant **Adidas** for their new Paris store in creating a series of graphic rugs through the recycling of old trainers — one of the hardest fashion products to recycle. The initial sampling process, generated by shredding the shoes, left her with a uniform grey colour, however further testing and granule combinations allowed for different colour variations. Post is keen to develop the material further, looking to create entire floors as well as the potential of making new shoes from the new material.

Material innovation

Finnish solid-manufacturer **DURAT** have developed unique materials which contain recycled post industrial plastics and are 100% recyclable. DURAT has further created a new line of materials called the Palace Collection, which uses earthy tones with shimmering flecks of natural mineral pigment. **Charlotte Kidger**'s industrial craft project focuses on utilising plastic waste streams associated with CNC fabrications. Kidger has developed a composite made from reclaimed polyetherane foam dust and resin with added pigment for colouring.

Make it with paper

Richlite is an incredibly durable, extremely versatile, and highly sustainable material made from resin-infused paper. Richlite has expanded into a premium surface material used in the aerospace, marine, action sports, culinary, architecture, and design industries, and in machine shops and automotive manufacturing. Handmade from many layers of high quality custom craft paper, Richlite's surface texture comes from the natural variation in the way fibers lay within the paper. Richlite's color comes from a combination of the paper and the amber tone of the resin. With materials made from recycled content and pulp derived from responsibly harvested trees, Richlite's goal is to achieve success while leaving behind a smaller footprint.

Key take aways:

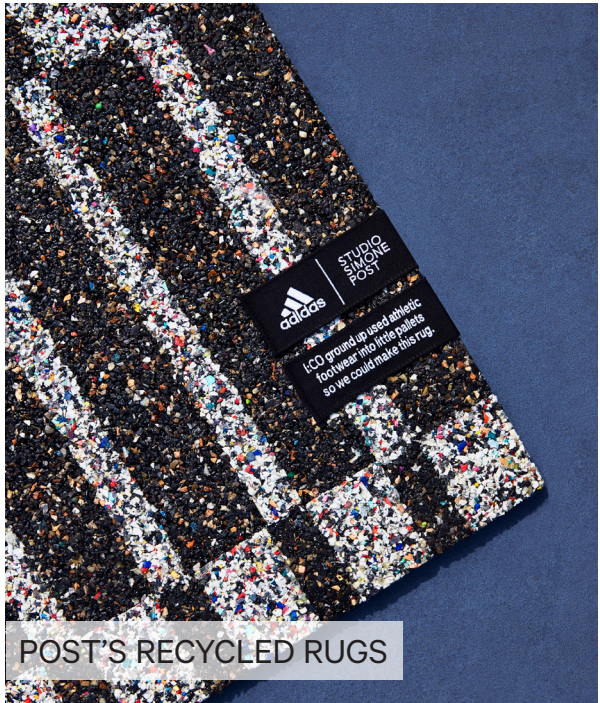
- Recycled materials
- Utilising waste streams
- Natural bright pigments



DURAT PALACE COLLECTION



CHARLOTTE KIDGER



POST'S RECYCLED RUGS



RICHLITE — MAKE IT WITH PAPER



POST'S RECYCLED RUGS

Context | Materials

Trend Analysis

Zero leftovers

Popularly known for having been involved in numerous environmental initiatives over the years, **H&M** are now launching their **Conscious Exclusive Collection** for SS19. The premium collection, which includes feminine silhouettes inspired by nature, is created from innovative materials, with fabrics made from citrus peel, pineapple leaves and algae biomass. **Shellworks** turn discarded lobster shells into recyclable bioplastic objects. The material created acts as a sustainable alternative to single use plastics. Any left over materials can be later turned back into the original bioplastic solution, making their products infinitely recyclable.

Bio-couture

Designer **Piero D'Angelo** addresses air pollution by creating bio-garments that filter the air around us and reduce harmful pollutants. Piero has also created the **'Propagation Kit'** that allows you to grow your own bio-couture garment. The active component of his fabric is lichen — a symbiotic organism most commonly made of fungus and either green algae or a cyanobacterium, that plays an important role in our ecosystem. By combining fashion and lichen he has produced a textile that will purify our air as we wear it.

Plant-based alternatives

Bag manufacture **QWSTION** have created the world's first technical fabric made from banana fibre. "Banana Hemp" or "Abacá", is sturdy and self-sufficient, requiring no pesticides or extra water. These qualities have allowed it to contribute to reforestation in areas of the Philippines once eroded by palm plantations, whilst enhancing the economic prosperity of its farmers. Their Bananatex® Collection designs are based upon the characteristics of the material, with patterns designed to leave zero waste after cutting the individual parts. At the end of the bags' lifecycles, their fabric is 100% biodegradable, and their buckles and zippers can be recycled.

Key take aways:

- Natural, innovative materials
- Purifying textiles
- Biodegradable products



DURAT PALACE COLLECTION



SHELLWORKS



POST'S RECYCLED RUGS



H&M'S CONSCIOUS EXCLUSIVE COLLECTION



QWSTION — BANANATEX BAGS

“Architects Brimet Silva and Ana Fonseca of Digitalab have together developed a method of turning cork into a thin thread that can be used in the manufacture of furniture, lighting, textiles and accessories.

Called CO-RK, the thread offers a sustainable, non-fibrous alternative to materials like plastic”

TECHNOLOGY

“I wanted to enter the world of fashion, but soon became disheartened by the unsustainable means by which it operates” — Ryan Mario, Petit Pli founder

“Childrens clothing that grows bi-directionally”

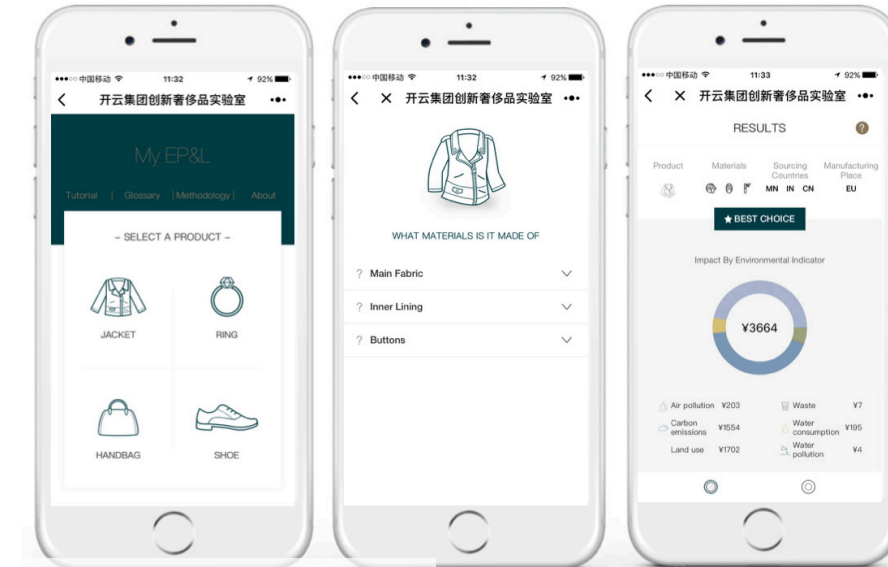
Technology Trend analysis

Informative apps

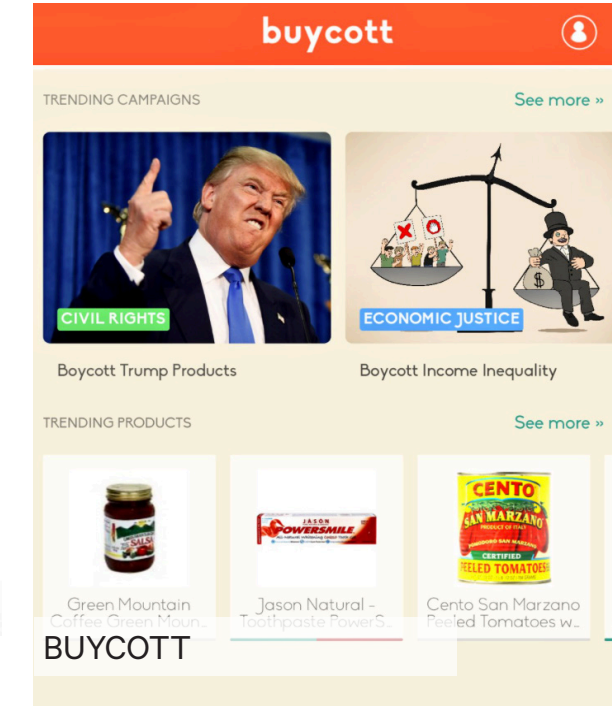
A number of informative apps have become available, providing all the information you need to make more informed decisions and hold brands accountable for the impact they have on the planet. **Good on You** is a free app that shows you a brand rating based on how they impact workers, the environment and animals. **buycott**, allows users to scan barcodes on products and see if the product is ethically produced and good for your health. Users can also communicate with companies and demand better ethical responsibility. **Kering**, the parent company of high-end labels such as Gucci and Balenciaga, launched a sustainability app 'My EP&L', which enables customers, designers and all, to measure their environmental impact, which is then converted into values and scores, encouraging a move toward greater sustainability in future projects and decision making.



GOOD ON YOU



KERING - MY EP&L



BUYCOTT

Demand-led software

Technology is enabling the fashion industry to transform its production processes, data analysis and cut waste to make each more efficient. A new 3D software called **CLO** gives designers the tools to design garments in digital form without the need to cut out a physical pattern. **Atacac** create their designs using this software and present the 3D renders online for consumers to buy, ensuring that garments are only produced when necessary.

Smart wardrobes

Digitisation of wardrobes is making people more aware of what they already have in their wardrobes. Through machine learning, **Finery** suggests novel outfit combinations. **Save Your Wardrobe** is an app that offers a convenient service, as soon as you purchase an item the app will automatically upload it to the digital wardrobe. AI technology scans emails and online retail accounts for recent purchases.

Key take aways:

- Organisation for convenience
- On demand production
- Clever wardrobes



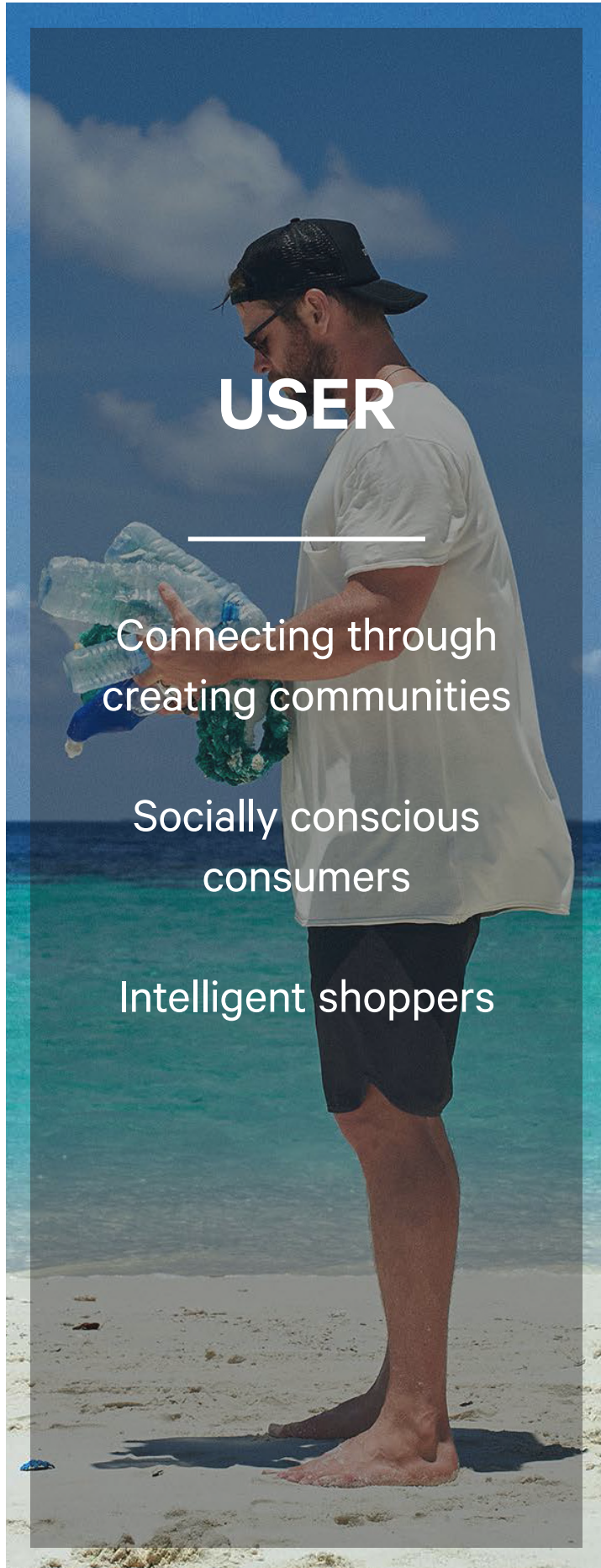
ATACAC



CLO 3D

“Chile-based designer Margarita Talep has created a sustainable, biodegradable alternative to single-use packaging, using raw materials extracted from algae.”

“fabrication will be an important part of future industries”

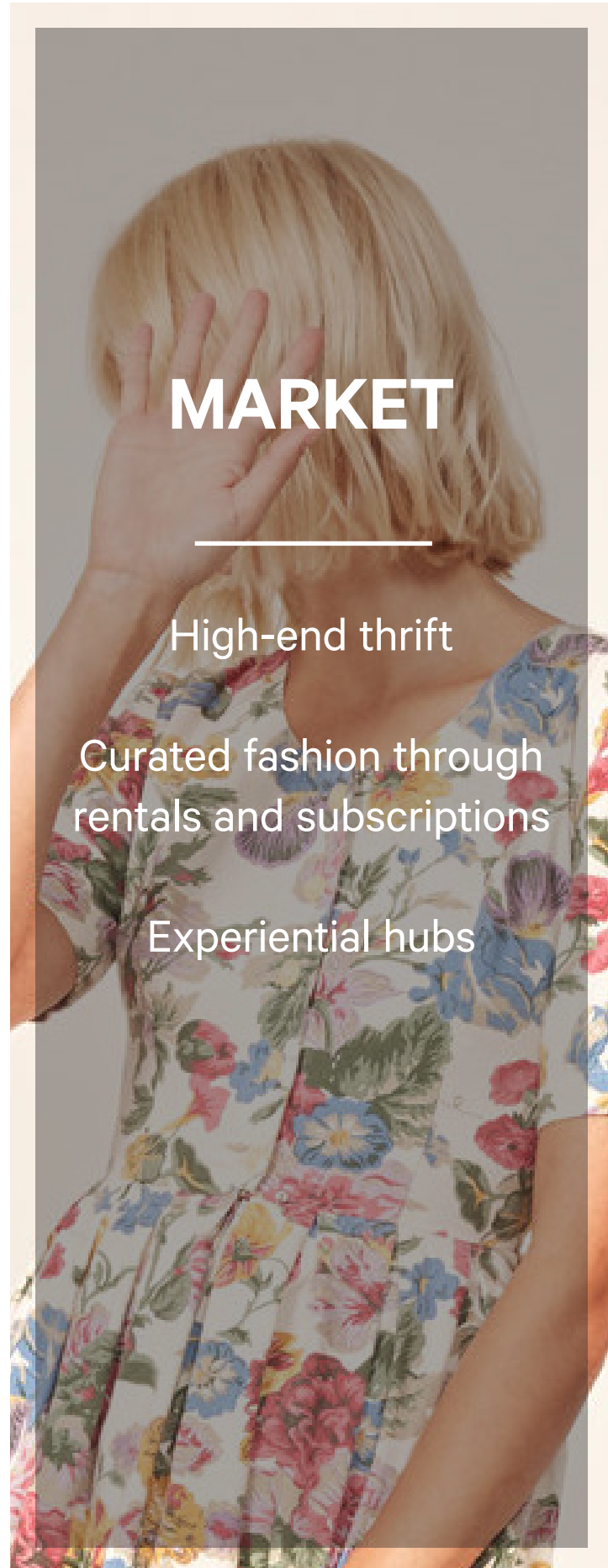


USER

Connecting through
creating communities

Socially conscious
consumers

Intelligent shoppers



MARKET

High-end thrift

Curated fashion through
rentals and subscriptions

Experiential hubs

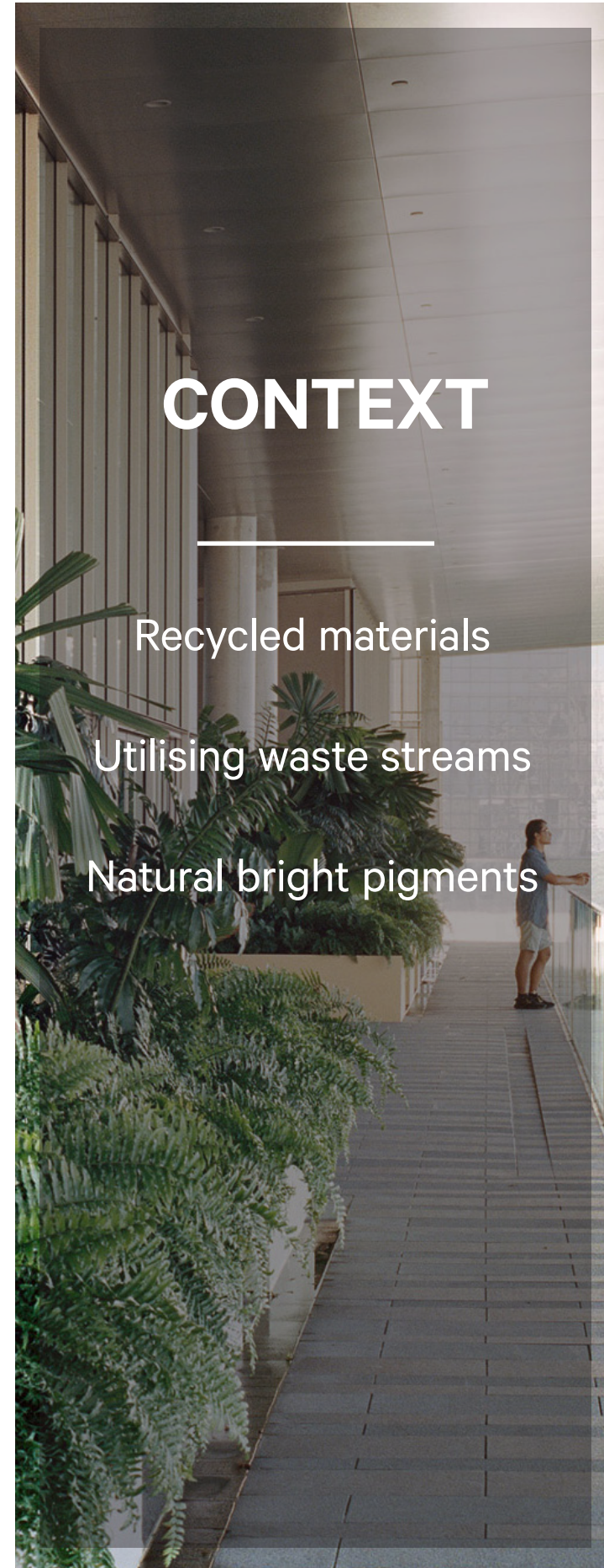


CULTURE

Consumer engagement
and product takeaway

Practical workshops and
wellness classes

Product education and
convenience market

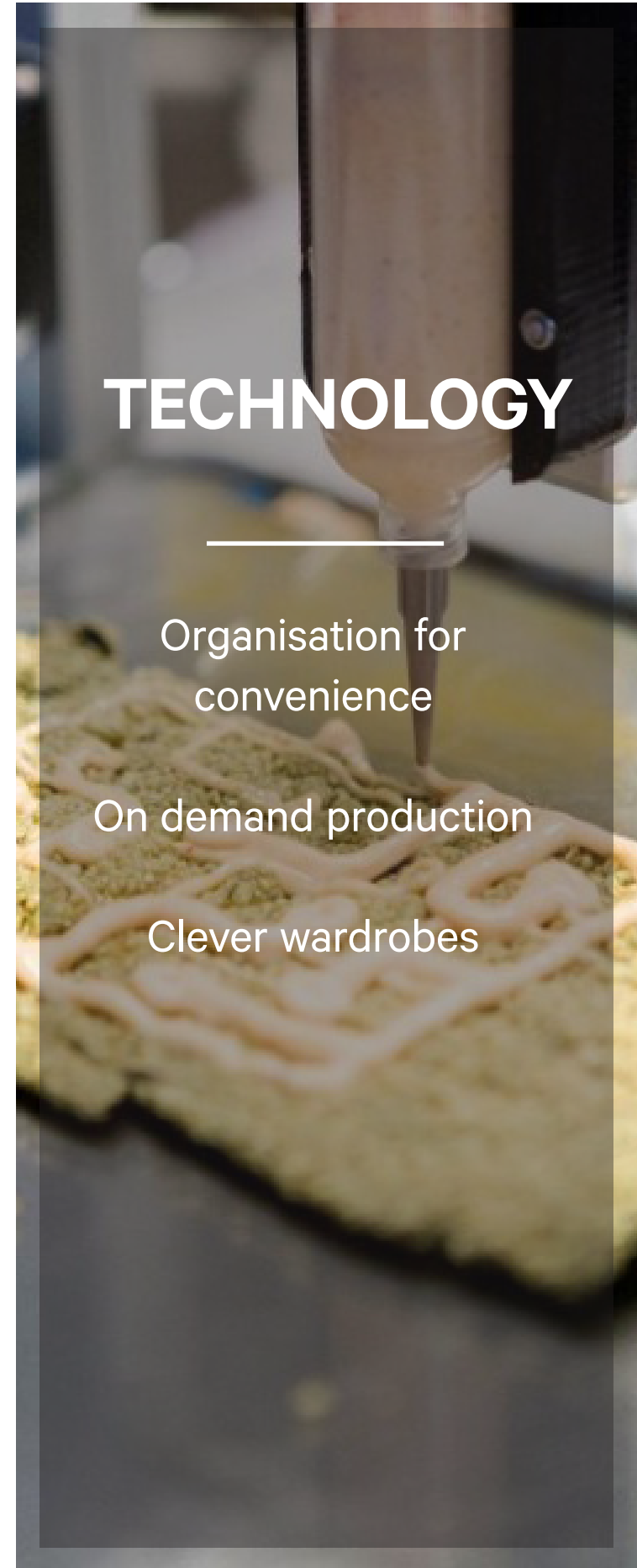


CONTEXT

Recycled materials

Utilising waste streams

Natural bright pigments



TECHNOLOGY

Organisation for
convenience

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Clever wardrobes

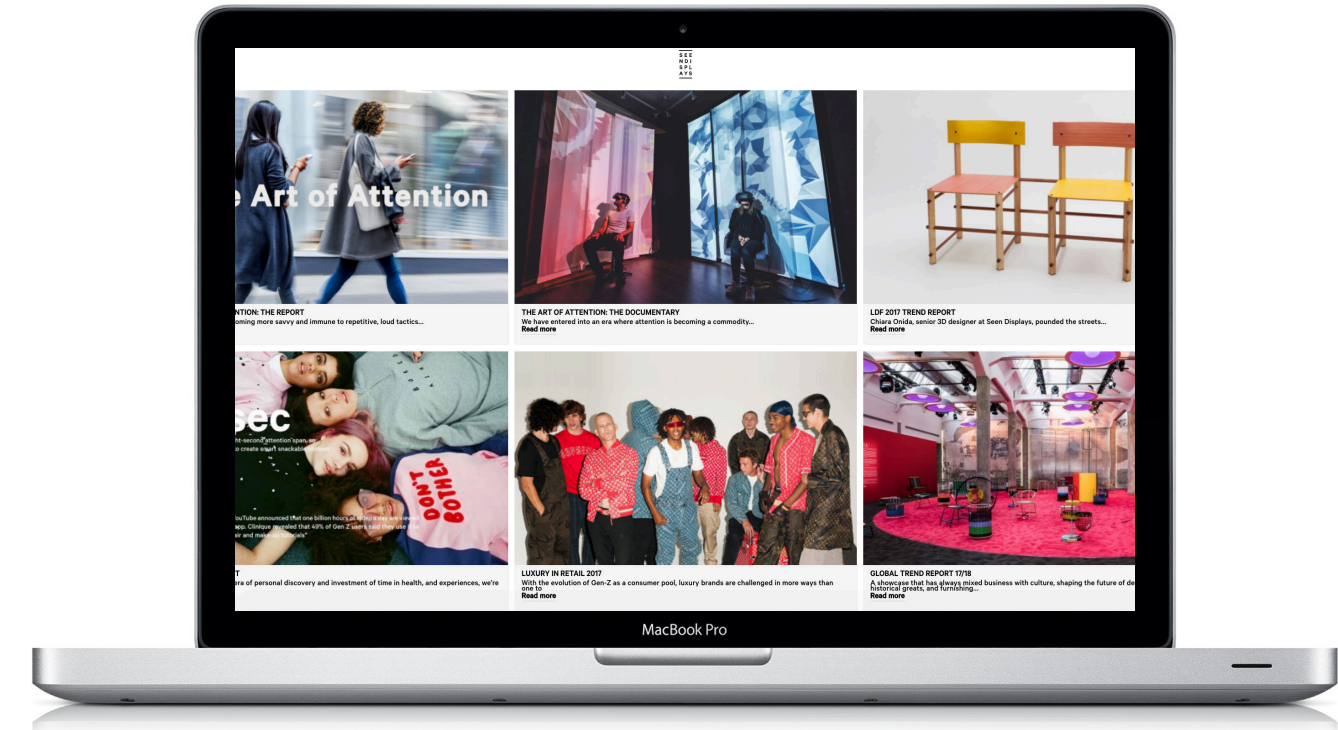
Sustainability Overview

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insight for your brand?

Contact us on the below, we
would love to hear from you!

contactLDN@seendisplays.com



MAKE A DIFFERENCE

Register for exclusive access to
progressive, trustworthy and
experimental insight.

Sign up to our members hub and join
the retail revolution.

THANK YOU