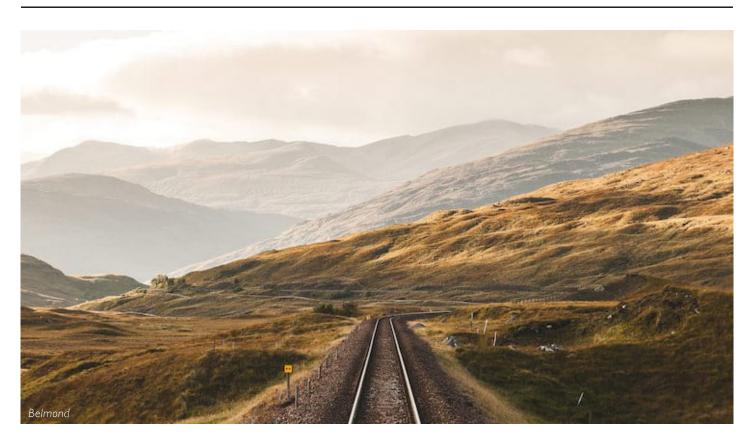
Revivalism



Revivalism 2020 Macro Trends



A life of constant connection and endless scrolling is driving a shift in the opposite direction. A 2019 study by Edison Research and Triton Digital shows that social media usage among Americans 12 to 34 years old across several platforms has leveled off or is waning. At the same time, location-based experiences are projected to become a \$12 billion dollar industry by 2023 at the current rate of growth. Capitalizing on our desire for disconnection, brands are introducing products that temporarily block access to our smartphones. In January 2020, Google Creative Lab released three new Digital Wellbeing tools aimed at mitigating smartphone addiction. But, is this enough?

Digital detoxes and off-the-grid travel have surged in popularity over the past several years as consumers look for more extreme ways to experience the world sans screen. Digital detox company Unhustle offers programs, retreats, and coaching to improve wellbeing and reduce stress, while The Ranch Malibu encourages guests to unplug with no cell service, limited Wi-Fi, and daily activity-based itineraries. Despite the intrigue, these retreats reveal one of the largest underlying problems with the digital detox movement: Unplugging is a luxury only the most privileged of us can afford. Because of our increasing dependence on the internet, the real privilege of the future is having the ability to disconnect from it.

A desire to live slowly reveals a renewed appreciation for the journey. This same appreciation is becoming apparent in products consumers are buying. A return to craft is marked by the remembering and

Revivalism 2020 Macro Trends

celebration of artisanal skills and customs. By shifting focus from the final product to the process of making, we are able to create more meaningful relationships between people and things. Apparel and accessories brands are finding ways to participate in this movement and assign new value to the products they sell. The North Face is sending its designers back to school to learn how to reuse, repair, and improve the longevity of the garments they make, while Pampa, an Australian home goods brand, is working directly with skilled artisans in remote parts of rural Argentina to create woven textiles that resonate with a growing number of consumers.

The rich cultural heritage of artisans is something that should be acknowledged and celebrated. The skills that were once passed from one generation to the next

are now in danger of being forgotten. An aging generation and a shortage of artisans is leaving luxury labels scrambling to fill their workshops. LVMH has developed a strategy to preserve the legacies of local artisans. Established by the conglomerate, the Institut des Métiers d'Excellence, or IME, aims to cultivate the next generation of skilled craftsmen. However, the concern for legacy preservation extends to more than just the apparel industry. Travelers and companies are becoming far more conscious of the threat tourism poses to the future of cultural traditions and heritage landmarks. Airbnb is experimenting with a new tourism model by introducing programs in which the traveler doesn't just enjoy the experiences offered by locals, but becomes a participant in change and helps to preserve the cultural traditions of the places they visit.



Because of our increasing dependence on the internet, the real privilege of the future is having the ability to disconnect from it.

The Disconnect



The Disconnect is an offline-only, digital magazine that requires readers to disconnect from the internet before reading. The magazine is an experiment that combines the pace and intentionality of "old" media with the accessibility and inventive nature of "new" media. By turning off the WiFi, readers are able to engage with digital content at their own pace, without constant distractions and endless advertisements. The bi-annual publication features stories about a range of topics.

Slow Cabins offers a temporary escape from the stress of daily life. The company places temporary off-the-grid eco lodges at secret locations across Belgium. Lodges have no internet and can be booked "For Two" or "For the Family," which encourages guests to not only reconnect with nature, but also reconnect with each other. Slow Cabins views nature as a source of inspiration, so all lodges are fully self-sufficient and consciously designed with a minimal environmental impact.



Slow Cabins

Unsung Weavers



Unsung Weavers is a series of coats made from handcrafted woolen blankets salvaged from Mediterranean villages. High in Greece's Peloponnese mountains lives a rich tradition of craftsmanship as local artisans shear, spin, and weave wool into textural blankets. By repurposing these blankets, Unsung Weavers celebrates the long forgotten rituals of rural production and revives the ancient craft of weaving. This season, Unsung Weavers launches in Dover Street Market.

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The overly saturated and undeniably addictive quality of the internet is catching up with consumers. Tired of the endless scroll, people are realizing that memories are made offline. This realization has sparked a resurgence of the experience economy. A study by Eventbrite showed that 72% of millennials prefer to spend their money engaging in live events rather than on material possessions. According to projections from <u>Greenlight Insights</u>, at the current rate of growth, IRL, location-based experiences are projected to become a \$12 billion dollar industry by 2023.

In search of a slower pace of life, consumers find opportunities to step back from their daily stressors through mindful travel. As the flightshaming movement gains momentum, a push for slower methods of transport redefines modern luxury. Consumers are opting for more eco-friendly alternatives like train rides and bike rides that allow them to embrace the journey and revel in the beauty that surrounds them. Hotels are pitching themselves as more than just a place to stay, catering to travelers looking to connect with both their surroundings and each other. Luxury travel company Belmond offers nature walks and other experiences at its hotels around the world that allow guests to appreciate the local natural beauty, while the Moxy Hotels' established social programs have included everything from knitting classes to a collaboration in 2018 with networking and dating app Bumble. Stratford, a hotel and loft apartment development that opened in spring 2019 in east London, is also positioning itself as a social and cultural hub with a program intended to bring lifestyle, fashion, wellness, art, culture, and entertainment to its visitors.

72%

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\$12B

At the current rate of growth, IRL, location-based experiences are projected to become a \$12 billion dollar industry by 2023.

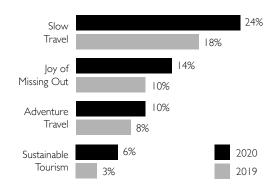
81%

81% of Gen Z, consumers age 14 to 24, prefer to shop in stores.

73%

73% like to discover new products in stores.

% share of responses from trips travelled in 2019, and potential trips in 2020



A 2019 study by Edison Research and Triton Digital shows that social media usage among Americans 12 to 34 years old across several platforms has either leveled off or is waning. Similarly, 2019 research from Global Web Index suggests that the amount of time millennial and Gen Z audiences spend on many social platforms is either flat, declining, or not rising as greatly as it has in years' past. Seeking meaningful connections and shared experiences, young people are venturing into more private and interactive online spaces. After years of constructing an online persona, this group is now looking to build richer connections found in bespoke communities that share their specific passions.

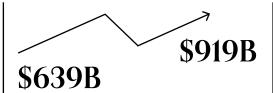
This shift toward IRL experiences and meaningful interactions has major implications for brands and retailers alike. Experience-related spending in recent years grew nearly four times faster than spending on goods, according to a McKinsey study of U.S. Bureau of Economic Analysis data. Brands are responding to this shift in demand by transforming experiences into selling opportunities. The goal from a business perspective is to design experiences that offer an opportunity to connect both on and offline. Consumers want to escape the pressures of their mobile devices, and still share online how much fun they're having offline.

The Beauty Experience

No industry is better suited for a shift toward experience culture than beauty. Research from Piper Jaffray shows around 90% of American teenagers still prefer to buy cosmetics in stores. Beauty is the only category where bricks-and-mortar's share hasn't fallen according to Erinn Murphy, principal and senior research analyst at Piper Jaffray. According to data released by AT Kearney in September 2019, 81% of 14 to 24 year olds surveyed preferred to shop in stores, with some using it as a way to disconnect from social media and the digital world, while 73% said they liked to discover new products in stores. Beauty brands are finding ways to tap into generation Z's love of IRL shopping. Harrods announced the launch of its H Beauty standalone beauty concept opening in April 2020, which will offer services such as a "coffee-to-cocktail" bar, and blow dry and facial treatments. By building welcoming in-store beauty experiences, brands are able to satisfy consumers' growing desire to immerse themselves in the shopping experience, discover new products, and ultimately, make more purchases



2/3 of Americans say that they "somewhat or strongly agree that periodically 'unplugging' or taking a 'digital detox' is important for their mental health.



The global market size of the wellness tourism industry is projected to grow from \$639 billion in 2017 to \$919 billion in 2022.

70%

Identified rates of anxiety and depression in young people have increased by 70% over the past 25 years.

Sources: American Psychological Association, Global Wellness Institute, Royal Society For Public Health

The harmful effects of screen time are well-researched and widely known. Social media has been inextricably linked to increased rates of anxiety, depression, and poor sleep. One in six young people will experience an anxiety disorder at some point in their lives and identified rates of anxiety and depression in young people have increased by 70% over the past 25 years. According to the Royal Society for Public Health, young people claim that four of the five most used social media platforms (Instagram, Snapchat, Facebook, Twitter) make their feelings of anxiety worse.

Our inability to disconnect is a consequence of more than just social media. The internet in general has become integrated into every aspect of our daily lives, making it both extremely important and nearly impossible to unplug. Brands are capitalizing on our desire for disconnection by introducing products that temporarily block access to our smartphones. The Arrivals Aer puffer jacket features a pocket that blocks cellular

and GPS signals, encouraging wearers to reconnect with the outdoors. In January 2020, Google Creative Lab released three new Digital Wellbeing tools aimed at mitigating smartphone addiction: Screen Stopwatch, Activity Bubbles, and Envelope.

In a culture of increasing isolation, we are commodifying offline, human experiences. People are turning to wellness retreats and digital detoxes to experience the world sans screen. An array of digital detox companies, including Unhustle, The Ranch Malibu, and Slow Cabins, are creating technology free spaces and promising a renewed outlook on life. Slow Cabins fully embraces the slow living movement, offering stays at off-thegrid eco lodges in secret locations close to home. The company's unique approach requires guests to leave the digital world behind and immerse themselves fully in their natural surroundings.

Despite the intrigue, these retreats reveal one of the largest underlying problems with

The New Luxury 02



the digital detox movement: Unplugging is a luxury only the most privileged of us can afford. Milton Pedraza, the chief executive of the Luxury Institute, calls this "the luxurification of human engagement." Because of our increasing dependence on the internet, the real privilege of the future is having the ability to disconnect and distance yourself from it.

According to early results of a landmark study on brain development supported by the National Institutes of Health, children who spent more than two hours a day looking at a screen got lower scores on thinking and language tests. In Silicon Valley, screen time is increasingly seen as unhealthy. Executives are already sending their kids to tech-free schools, limiting screen time at home, and partaking in digital detox retreats. In other words, the very people who

created our addiction to technology are now paying to escape from it.

"If you're truly at the top of the hierarchy, you don't have to answer to anyone. They have to answer to you," says Joseph Nunes, chairman of the marketing department at the University of Southern California, who specializes in status marketing. While the wealthy can afford to step away from technology, many others cannot. In an increasingly connected world, parents, children, and employees feel obliged to be available at all times, unwilling to risk extended periods of disconnection. So while digital detox camps and mindfulness practices may be viable solutions for the upper class, they are merely temporary and exclusionary fixes to a much larger systemic problem.

A return to craft is marked by the remembering and celebration of artisanal skills and customs. In a culture of efficiency and excess, we are slowing down, redefining value, and challenging the perception that clothing and other goods are disposable, or should be treated as such. Creatives are turning to analog formats to cut through the digital noise. Coldplay promoted the release of their eighth studio album with a series of small ads placed in the classified section of local newspapers. The band also sent seemingly personally typed postcards to selected fans via snail mail.

People are beginning to find beauty in the process, a pillar of the slow living movement. By shifting focus from the final product to the process of making, we are able to create

more meaningful relationships between people and things. The Object is Absent exhibition at the MU Space in Eindhoven during Dutch Design Week brought together twenty projects across various mediums to explore the act of making. It placed designers at the center of the work rather than physical items. For example, in the Action Shop, designers taught visitors how to create a particular action or movement, rather than offering them a physical object to take away from the show. The goal was to show that it is possible to move toward a different way of living. By owning fewer things and having a different relationship with those that we own, we will in turn create less of an impact on the world around us, the co-curators told Dezeen.



The Art of Making 03



Apparel brands are finding ways to participate in this movement and assign new value to the products they sell. The North Face is sending its designers back to school to learn how to reuse, repair, and improve the longevity of the garments they make. The Renewed Design Residency aims to help designers shift from focusing purely on the performance and aesthetics of a garment to thinking about the entire garment life cycle. Pampa, an Australian home goods brand, works directly with skilled artisans in remote and rural Argentina to create high quality woven textiles. Founded to protect Argentina's woven heritage, the brand tells the story of each of its artisan partners through words, images, and products. This approach combines elements of sustainability. transparency, and craft that resonate with a growing number of consumers that value quality over quantity.

We urgently need to create new relations and values between people, and between things and people.

- Alexandre Humbert and Lucas Maassen, Co-curators of The Object is Absent



Skills and traditions that were passed down from one generation to the next are in danger of being forgotten.

The skills and traditions that were once passed from one generation to the next are now in danger of being forgotten. LVMH has developed a strategy to preserve the legacies of local artisans. The Institut des Métiers d'Excellence, or IME, aims to cultivate the next generation of skilled craftsmen. The institute offers 20 tracks for students in France, Switzerland, and Italy in a variety of specialties, such as leather goods, jewelry, watchmaking, and shoes. In September of 2019, the conglomerate announced its partnership with La Fabrique Nomade, an association that helps refugee artisans in France find employment. These initiatives reflect the essential role of artisans within the Group's ecosystem.

The rich cultural heritage of artisans is something that should be acknowledged and celebrated. LVMH has made preserving

and passing on this savoir-faire to new generations a fundamental priority, however, other luxury brands have not been as supportive. Indian craft and embroidery traditions have become an integral part of become. many luxury brands and they, in turn, sustain artisanal livelihoods season after season. The exportation of these skilled practices are due to both cost and shortage of artisans. "While beautiful craft-making still exists in Europe, the numbers are fast dwindling and cannot be compared with the artisanal breadth and volume that India offers." says Karishma Swali, managing director of Chanakya, a Mumbai-based export atelier. In addition, the cost of producing luxury embroideries in Europe would be around ten times higher than what it costs in India. embroidery According to the Business of Fashion, embroidery traditions represent a mix of ancient influences drawn from silk route

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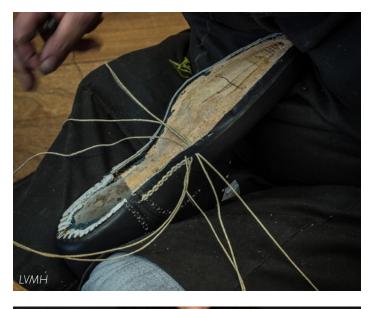
India.

Traditional craft has

Lost Legacies 04

trading, Persian invasion, centuries of internal migration, trade with China and diverse local-cultural beliefs. Unfortunately, due to India's recent reputation as a cheap exporter of garments for fast fashion brands, many contemporary western designers refuse to acknowledge their relationships with India. As transparency becomes an increasingly important part of the supply chain, it is to everyone's benefit to celebrate the traditions that are on the verge of being lost forever.

The concern for legacy preservation extends to more than just the apparel industry. Travelers and companies are becoming far more conscious of the threat tourism poses to the future of cultural traditions and heritage landmarks. In October 2019, Airbnb in China launched appreciat a campaign called "Lost & Found" aimed – to preserve China's heritage sites. Faced with an increasing loss of awareness and recognition of traditional craft, the platform offers travelers the chance to learn Chinese crafts and traditions from 40 masters as Chinese part of its traveling experiences. With a similar goal in mind, Airbnb also sponsored masters a project called Italian Sabbatical, in which selected visitors became temporary members of the southern Italian village of Grottole. As its population ages and younger people move away, the village is at risk of disappearing. The project experiments with a new tourism model, in which the traveler doesn't just visit passively or enjoy the experiences offered by locals, but becomes a participant in change.









Faced

with a loss of

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offers travelers Roadmap 2020 Macro Trends





















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