

Fashion in Flux

The influence of New Femininity, Modern Masculinity and Conscious Consumerism on Brands.





Introduction

It's September 2023, it's the beginning of the fashion year, and after Covid lockdowns, the shows are returning in full - or even greater force. As Vanessa Friedman, fashion director at the New York Times, put it earlier this month, as New York Fashion Week kicked off, *"The news may be full of Trump indictments, extreme weather and war, but ...for anyone in need of a moment of escape or some inspiration to gird yourself for the day, the shows may represent an increasingly important pressure valve."* Friedman's comment reminds us that not only have the shows evolved from, well, shows into huge-scale 360 entertainment happenings, but they also highlight the dynamic and reciprocal influence of fashion and human behaviour.

Fashion brands understand the potential inherent in this interchange: you are (or can aspire to be) what you wear. Why? Because fashion is psychology - so much so we now have the world's first MSc Applied Psychology in Fashion thanks to London's University of the Arts. (If you're still not persuaded, think of 'enrobed cognition', the phenomenon whereby the symbolic significance of clothes affects and influences our cognitive functions. This is what was at play when women climbed into their 80's boardroom power suits and started to bang on the glass ceiling or when ethnic groups choose traditional dress over black tie at formal events to express a sense of pride and belonging to their community.)

But fashion is also profoundly political. From the personal - the clothes we wear to fit in with widespread social norms, to bend those same norms or to flat out rebel - to the social: the fact that 75% of the world's 60 million garment workers are women, the majority of whom experience the fall out from gender inequality, but also harassment or violence at work - politics and fashion have a complex and interconnected relationship.

And then there's the business of fashion itself - the industry is

one of the biggest in the world, generating \$2.5 trillion in global annual revenues before the pandemic. As digital innovation changes how we shop, the implications of new or impending eco-legislation are felt, and as conscious consumerism picks up, this industry behemoth is having to change in more ways than anyone could have imagined.

As Coco Chanel famously said, *"Fashion is not something that exists in dresses only. Fashion is in the sky, in the street, fashion has to do with ideas, the way we live, and*

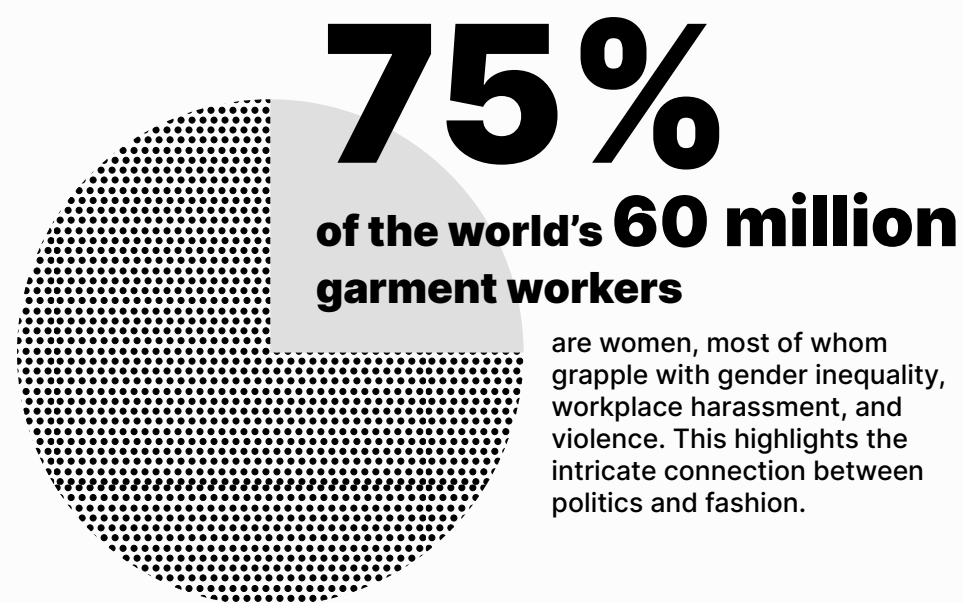
"Remember, we are all wearing signs; the way we dress lets people know where our head is at, all the time."

Halston

what is happening." These words remind us that in many senses, peering more deeply into the web of interconnected social, political and psychological dynamics that make up 'Fashion' can provide rich insight into current moods and trends. Equally, fashion brands are missing an opportunity to get closer to their potential audiences if they fail to fully embrace those shifting sands and adapt their operations and communications. To help us unpack some of these issues, we recently invited The

Guardian's associate fashion editor, Jess Cartner-Morley, to join brand marketers, influencers and activists and share her thoughts on some of the social influences she is seeing at play currently and those which are on the horizon for the fashion industry. Unsurprisingly, it was a wide-ranging discussion, with many of the emerging themes forming the jumping-off point for this short report.

We hope you find it inspiring.



\$2.5
trillion

the staggering annual revenue generated by the fashion industry worldwide before the pandemic.

1 Hi Barbie!

(Reclaiming femininity in fashion)

The history of how femininity presents in fashion is nothing if not cyclical; one might even say schizoid. Take the rebellion of the 60s and early 70s via the ritual burning of bras and the arrival of pantsuits for women, swiftly followed by Calvin Klein's best-selling Fall 1977 collection - a return to flowing blouses, billowing skirts in the most delicate of feminine fabrics as the pendulum swung back. From the 80s giant shoulder pads à la Dynasty that appeared as women sought to look more traditionally masculine in the workplace to the poufy rarra skirts and like-a-virgin lingerie-inspired ensembles made famous by Madonna. Look at the early 90s, a period that saw women bow down

at the altar of granny dresses, Doc Martens and plaid shirts, grunge-style, as they celebrated Riot Grrrl feminism. Yet shortly after, the emergence of Kate Moss and her skimpy silk slip dresses had women hankering after a certain waif-like, naked femininity not seen for some time. The 2000s continued with the barely-there 'Girl Power' theme thanks to ultra-low-rise jeans, miniskirts and crop tops as worn by 2000's poster-girl Paris Hilton. Somewhat unusually in fashion timeline terms, it wasn't then until the 2010s that the backlash came, in the form of normcore, the hipster anti-style, and athleisure - both of which served up their own gender-neutralish takes on femininity.



And here we are in the early 2020s, celebrating the revival of hyper-femininity and the idea that embracing femininity - even in all its Barbie pinkness - is absolutely not a weakness but rather an act of feminism itself.

A quick and dirty timeline such as the above, with its endless back and forth between apparently contradictory styles, can only

serve as a reminder that any kind of Either/Or-ism regarding femininity and feminism is wildly misplaced. Yes, there is an inherent tension between resolving the complex, enmeshed miasma of desire and politics, aesthetic taste and intellectual angst, but let's not forget that it's within the depths of this tension that most women today live their actual lives.

“When women are allowed to define what feminism is, they’ll say Beyoncé. Or Marilyn Monroe. But they’ll also say Joan of Arc.... Women don’t fit themselves into a binary box - femininity or feminism - so those categories don’t work. Recognising that leads to a more interesting conversation.”

**Jess Cartner-Morley,
Associate Fashion Editor,
The Guardian**

Jennifer A. Kingson, author of *Axios What’s Next*, sees where we are today as a turning point in this sense: *‘Behold the anthropological dichotomy of the summer of 2023: Grown women are dressing in head-to-toe pink and sipping pink cocktails at pop-up Malibu Barbie Cafés — while at the same time fighting the overturn of Roe v. Wade and promoting body positivity and #MeToo.’* Perhaps, she suggests, we’re heading for a place where fashion and looks-wise, women are at last comfortable in their own skins, femininity and power?

Of course, this isn’t an entirely new sentiment around the notion of ‘balance’. Think of the iconic boxy Chanel tweed suit, something that many of us today might associate with a very particular type of feminine dressing, along with

pearls and dainty handbags. But how many of us knew that Coco Chanel, in fact, took inspiration for her eponymous suit from the more comfortable sportswear that her then-boyfriend, the Duke of Westminster, wore, breaking the mould by dressing women in suits which made them feel more at ease than the restrictive clothes of the Belle Epoque, yet still emphasised femininity.

But if not new, summer ‘23 is undoubtedly a critical evolution - not least given women’s greater emancipation today. In this sense, and for all the current talk of non-binary fashion, how we might ask, can brands capture and reflect back to female consumers their growing ease with this anthropological bothism?

Fenomenal



In 2022, to celebrate International Women's Day and Mother's Day, George at Asda tasked us with creating a modern, female-forward campaign to engage shoppers.

Together with the client, we decided to turn the old-school definition of femininity on its head. From all things sugar and spice to a new, fresh take - femininity is whatever makes you feel FENOMENAL.

No more trying to live up to all those conflicting standards and stereotypes: slim but still curvy. Show some skin, but not too much. Be a girl boss, or even a mum boss, but don't be too bossy....

The resulting work celebrates people who feel empowered by fashion and femininity in all its forms. Using a fun and memorable play on words, we created a digital-first campaign designed

to provide the target audience with a joyful self-confidence boost. After all, only you can decide what your femininity looks like. And that should be whatever makes you feel good.



George.



Redefining Masculine Expression and Selling Gender-neutral

Four years after appearing on the cover of GQ's 'The New Masculinity' issue in a giant puffy ballgown, and six months after being named Louis Vuitton's creative director, Pharrell Williams is today at the epicentre of a movement to push boundaries and gender norms, allowing men the ability to be more expressive in their style choices. All this whilst simultaneously reshaping the luxury fashion business - uniting fashion and pop culture in fresh, authentic ways.

Vuitton's and broader society's growing recognition of the historical constraints of men's fashion is overdue. Whilst a certain flamboyance has been embedded

in at least wealthier men's clothes for centuries (think of the 'Peacock' age of Elizabethan men's fashion with all its velvets, satin, furs, silks and lace), it's now 200 years since menswear in the West was reduced to dark frock coats and more recently their modern-day equivalent - buttoned down shirts and tailored suits that come in a veritable array of four shades of dull. Yes, hipster, hypebeast and hip-hop culture have all done their essential bit to (re) shape masculine identity and how it's expressed through clothing, but there is still so much more work ahead if mainstream fashion is to escape from the codified silhouettes of what is masculine and what is feminine.



A New Maskenility:

In this summer's blockbuster 'Barbie', it's through his clothing choices that we see Ken navigating what he thinks it means to be a man:

"The outfits that catch his eye are coded symbols of machismo. He ogles a man strutting across the street wearing a floor-length white mink coat, gazes at a group of businessmen in boxy tailored suits and ponders the sweat-stained '80s-style sleeveless vests worn in a nearby gym. In that moment, Ken's limited understanding of masculine dressing communicates three things: wealth, power and muscle."

Leah Dolan, CNN.com

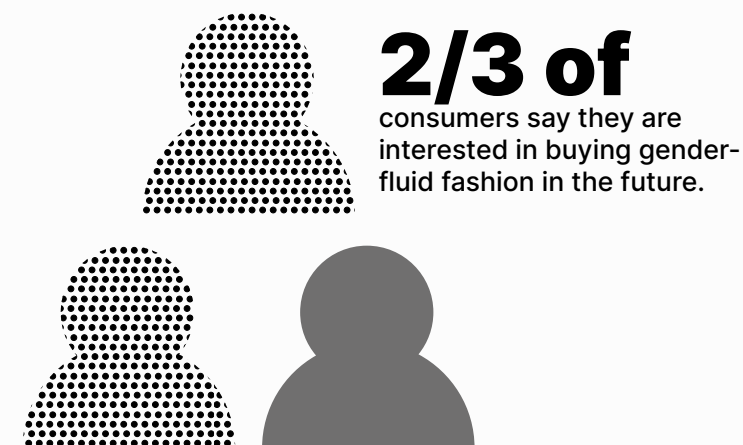
The rise of so-called gender-neutral or unisex fashion is one example here, consistently defaulting as it does by and large to male-coded clothing. Transgender campaigner for common ground, Katy Jon Went, agrees, "Gender-neutral fashion is Communist bloc-bland/ Star Trek androgyny... Women wearing menswear is just feminism, but (everyday) men wearing womenswear should be too - not only the pop stars, 'they/thems' and Eurovision camp crooners."

At stake here for brands is a piece of the sizeable gender-fluid fashion pie: Industry projections suggest the global market for unisex or genderless fashion will grow by 4.5% annually, reaching \$3.2 billion by 2028. But by playing to the default masculine silhouette, the femininity that

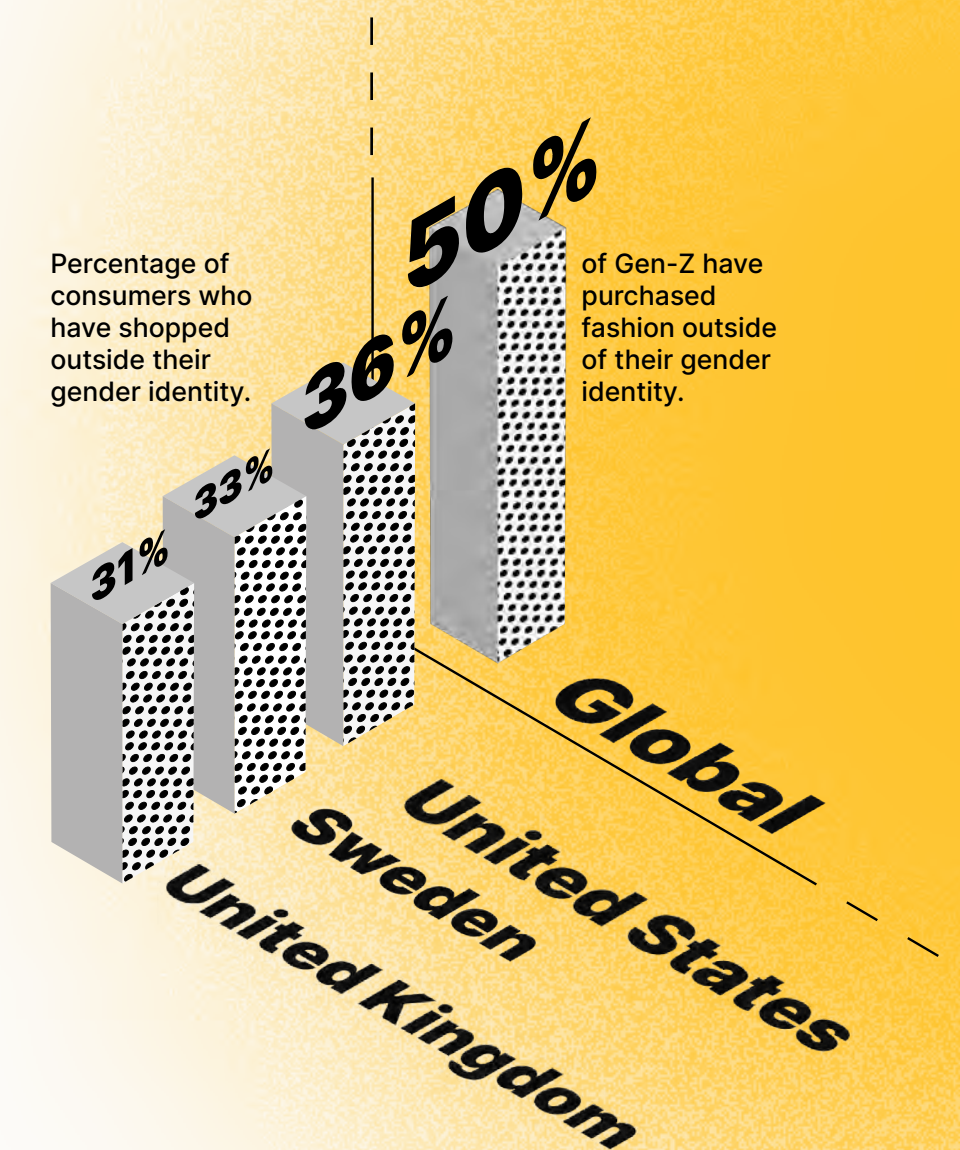
simultaneously exists within the notion of gender neutrality is lost, as is the opportunity for brands to truly connect with a more fluid-thinking customer base. Data collected in a survey last summer by fintech company Klarna found that as many as 36% of U.S. consumers had purchased fashion outside of their gender identity, followed by Sweden with 33% and the United Kingdom with 31%. The

\$3.2 billion

the anticipated value of the global unisex or genderless fashion market by 2028, with annual growth projected at **4.5%**. Brands are eager to tap into this sizable market segment.



same survey also revealed that around 50% of Gen-Z globally have purchased fashion outside of their gender identity, and approximately two-thirds of consumers say they are interested in buying gender-fluid fashion in the future, with younger generations leading the way - a stat not to be sniffed at given that Gen-Z will of course soon become the largest cohort of consumers globally.



“Part of the reason so-called gender-neutral fashion skews to the male silhouette is a result of the broader move to casualisation – men’s clothes have typically just been more comfortable to wear. But I think it will be real silent progress when we see more Harry Styles direction of gender-neutral dressing as that says something very cheering about gender.”

Jess Cartner-Morley



Fashion, Feminism and Femininity breakfast with Jess Cartner-Morley



Making the World Go Round

Circularity, Sustainability and Fashion

Shock fact: The fashion industry emits about the same quantity of greenhouse gases per year as the economies of the UK, France, and Germany combined. Is it any wonder then that the loudest noise in fashion today concerns sustainability? From reducing water usage ([according to Common Objective](#), the industry is said to use around 93 billion cubic metres of water per year, enough to meet the needs of 5 million people and an amount that is expected to double by 2030) to increasing the use of more sustainable fibres, or moving to renewable energy sources, a number of brands are stepping up to the plate, aware that today's consumers are increasingly shopping consciously.

Beyond all that is climate-specific, there are so many additional ways in which the fashion industry intersects more broadly with sustainability issues. Not least when you consider that the fashion industry is one of the largest employers in the world, especially of women, with some estimates that women make up roughly 80% of the supply chain (alongside the four UN Sustainable Development Goals related to the environment, non-profit body Fashion Takes Action lists another five labour-related SDGs where the fashion industry should and could have an impact, including gender equality and the eradication of poverty.)



**93 billion
cubic metres**

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“Fashion brands can’t just use people’s increasing desire to shop with values as an opportunity to sell. Authenticity is absolutely everything and has to be reflected throughout a company. Not just in your product, what it does and how it makes the woman who uses or wears it feel but also the voice that you give to the women who get to sit in the important meetings and, importantly, how you treat the women who come in and clean that room when you go home.”

Jess Cartner-Morley

As fashion and apparel companies grapple with the daunting task at hand - the most recent research from Business of Fashion Insights reveals a significant gulf between brands’ publicly disclosed commitments and their corresponding scores on sustainability objectives, pointing

to a substantial shortfall against 2030 goals - it’s worth considering additional areas of opportunity in the brand action and messaging space that could, in the interim, reap dividends with a growing cohort of fashion eco-consumers.

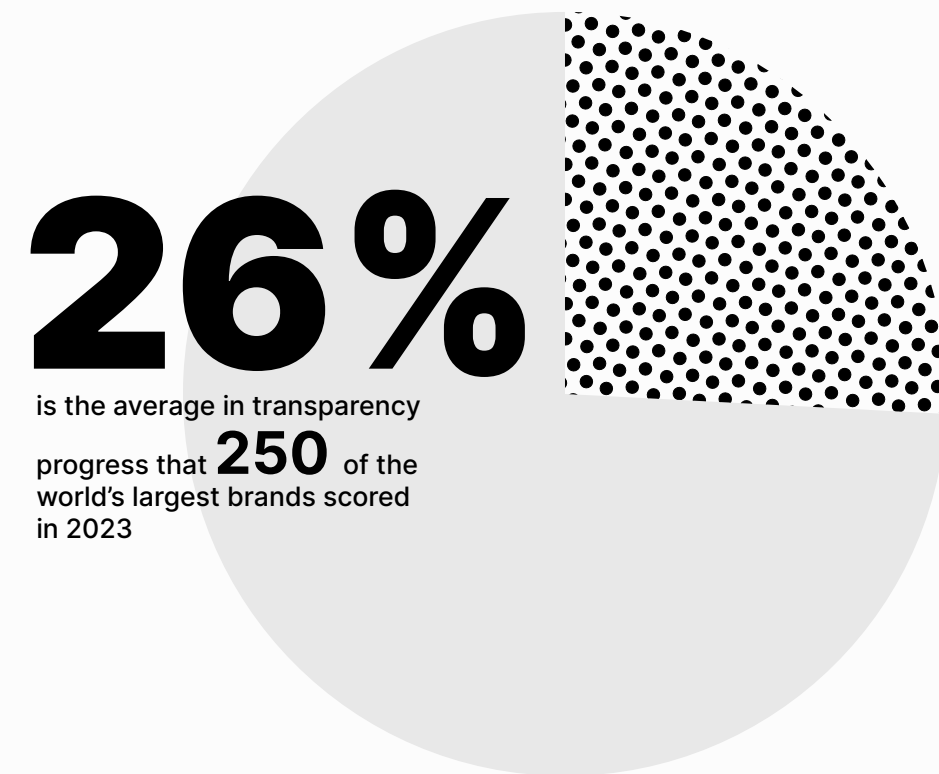


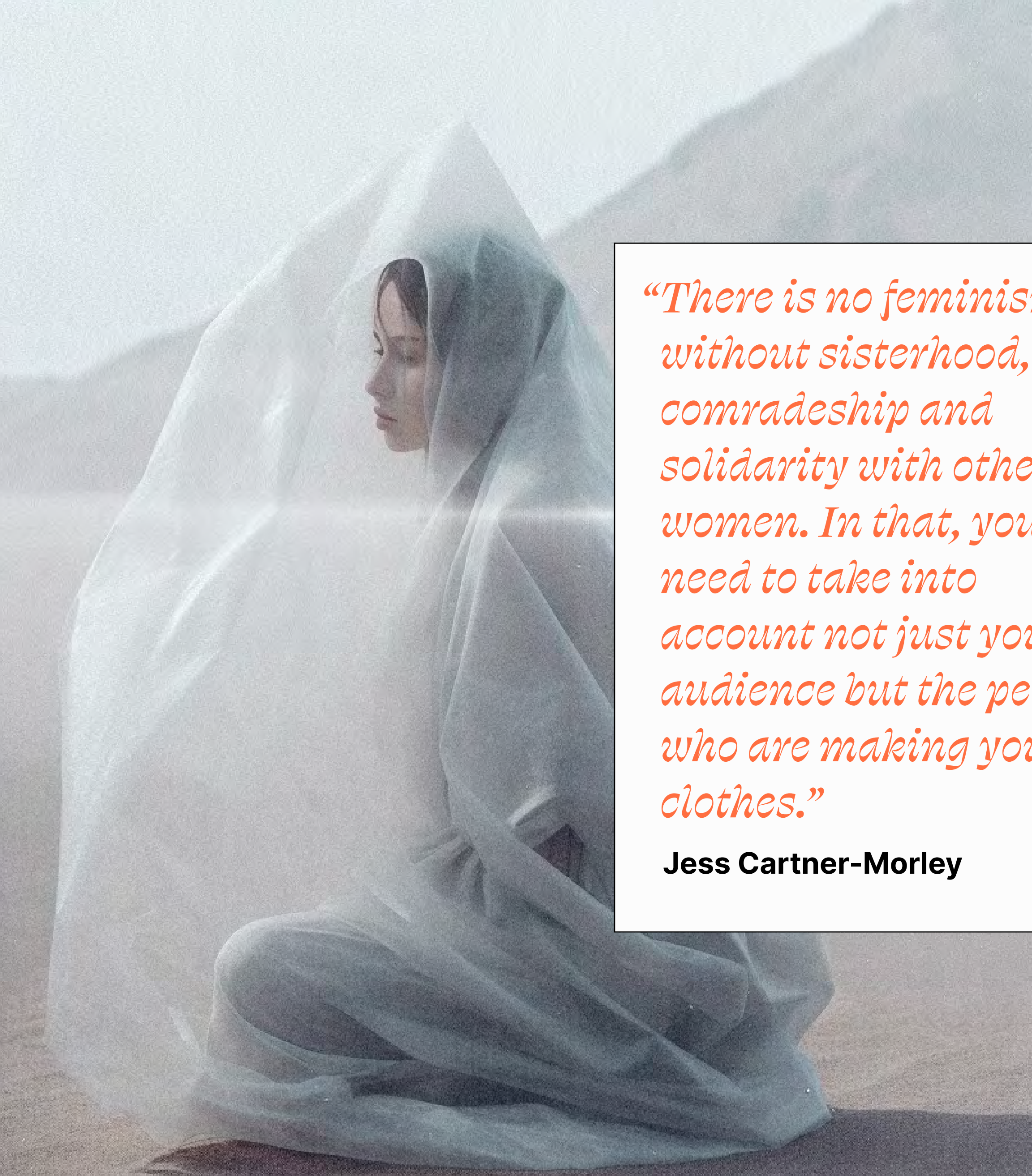
Transparency

People increasingly care where their clothes come from. However, with global supply chains fragmented and notoriously difficult to track, supply chain transparency has been a problematic issue for fashion brands to address. So much so that according to the most recent

Fashion Transparency Index for 2023, 250 of the world's largest brands are still scoring an average of just 26% in transparency progress. There are exceptions like Ganni, who, through its partnership with Provenance, a transparency tech provider, is showing that data and third-party proof can bolster consumer trust

in a brand's production when many other retailers are struggling to certify their garment origins. And it matters: research highlights just how much people want brands to provide this information so that they can shop more sustainably, with 55% of consumers in a poll last year saying that working out what fashion items are manufactured sustainably is confusing, 57% of women and 50% of men saying when they shop online, they don't know how to identify if an item of clothing is sustainable or not, and 54% of respondents saying they don't anyway completely trust the claims some brands make about their commitment to sustainability.





“There is no feminism without sisterhood, comradeship and solidarity with other women. In that, you need to take into account not just your audience but the people who are making your clothes.”

Jess Cartner-Morley

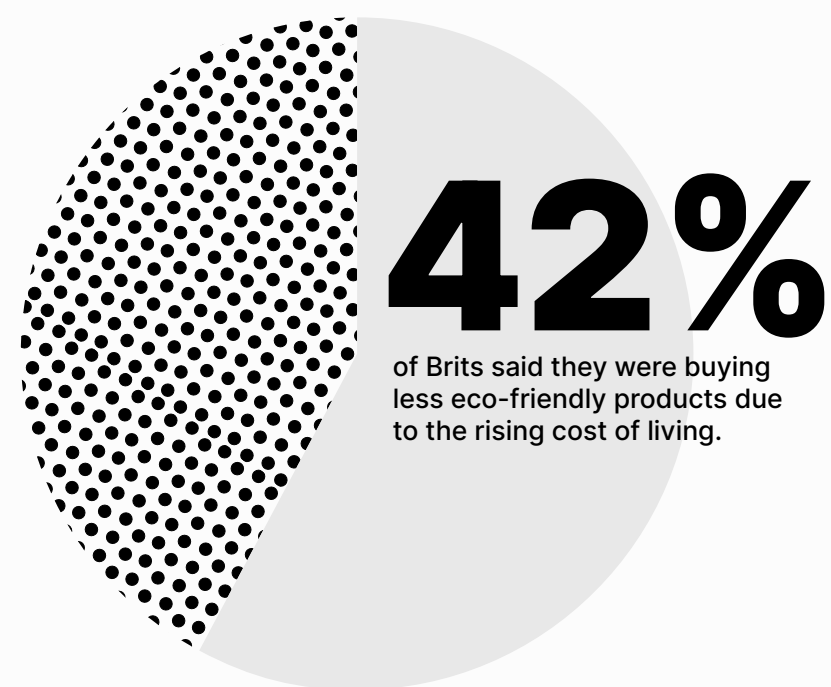
While technology’s influence on the fashion industry deserves a whole other report, given the extent to which it is entirely reshaping it, the Ganni/Provenance example serves to remind us just how tech-enabled radical transparency can help brands communicate their sustainability commitments in meaningful and verifiable ways.

Another connected way fashion brands can and should lean into transparency is how it relates to humility and vulnerability in brand communication. Recent research has shown that perceived pressure to be ‘perfect’ is causing brands to stay tight-lipped on their social and environmental progress, leading them to under-report or ‘greenhush’ their sustainability

efforts as a result. Yes, fears of being cancelled are real, but it’s important to remember that demonstrably committing corporate time and investment to tackle an important issue facing humanity will go some way in and of itself with eco-minded consumers and the humility required to confidently admit you’re on a journey can go a long way when creating emotional brand connections. Greenwashing and woke washing are indeed widespread, but ‘hushing’ genuine purposeful achievements for fear of backlash is not only the ultimate example of a brand selling itself short but could also have serious consequences for wider progress on a given issue.

Affordability

With so many of us struggling with day-to-day basics due to the cost of living crisis, it's fair to assume that the more existential threat of climate change will move down the list of people's concerns and priorities. Research from our study last November, "[Fixing the \(other\) Climate Gender Gap: The Role of Brands](#)", confirmed this - 42% of Brits said they were buying less eco-friendly products due to the rising cost of living.



This is where brands can play a vital role, helping consumers to continue favouring more sustainable products when they shop by offering them at price points that work for people. After all, as our research also showed, whilst two-thirds of respondents said the most important thing a brand can do for people during tough economic times is offer value for money, the piece respondents considered the next most important was to help the environment. It's a crucial point, as while some brands rightly see a purposeful role for themselves - to encourage people to make sustainable choices - there's an argument that it's more about enabling consumers to make the sustainable choices they already want to be able to make.

And while eco-friendly clothes are inevitably more expensive than fast fashion - something that hopefully will change as demand grows and new innovations in production drive prices down - there are less immediately apparent ways, unrelated to price-point, in which fashion brands can appeal to eco-conscious consumers. An insightful report last year from commerce experience platform Nosto reveals that shoppers also want online fashion retailers to address sustainability by offering slower deliveries, enabling apparel repairs and reducing product returns. And to the point above, these shoppers are crying out for greater transparency about where their clothes come from.



Circularity

According to McKinsey, almost all (roughly 97%) of clothing eventually ends up in a landfill, and 60% of apparel manufactured hits a landfill within 12 months of its manufacturing date. A seemingly obvious solution to this challenge is recycling garments - but refashioning old clothing into new has yet to take off: Currently, less than 1% of textiles produced for clothing are recycled, with one reason being the blending

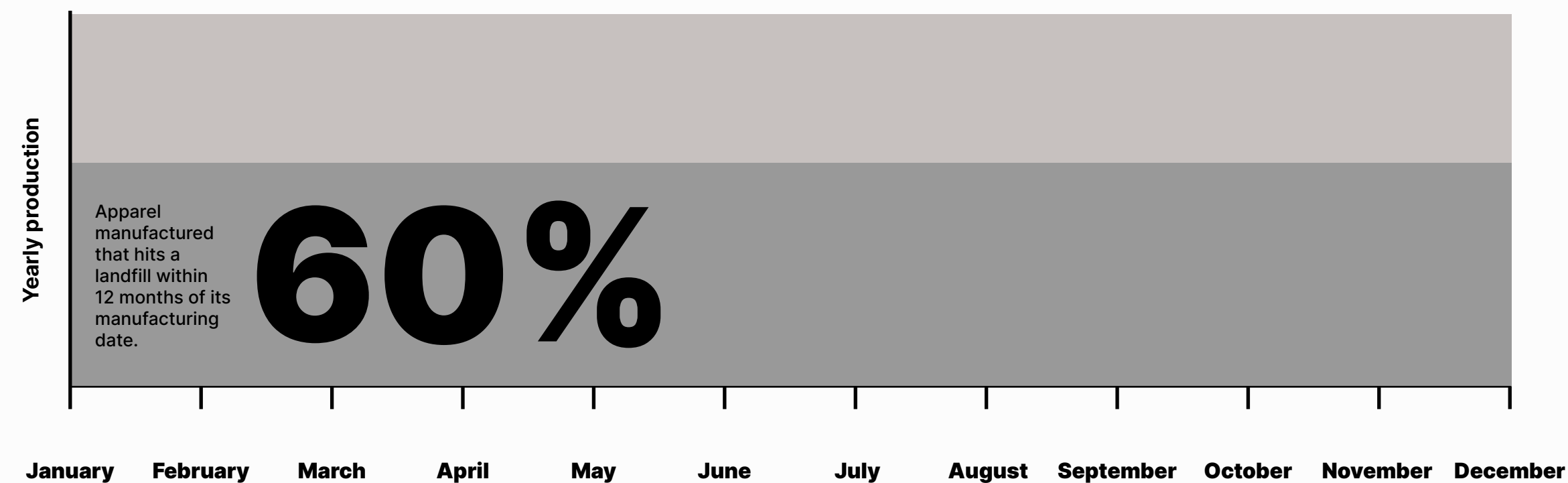
of textiles now common to the manufacturing process which make it harder to recycle one fibre without harming another.

While new or impending waste legislation in the EU and some US states should help improve textile economics, in part easing current pricing disparities between virgin and recycled fibres/fabrics over time, and the growth in rental and resale platforms continues apace,

it's clear that in an ideal world, we should all learn to just toss out less and cherish our existing wardrobes more. But for an industry founded, funded and fueled by its ability to sell aspiration, having to dial back the constant pushing of newness is a counterintuitive ask.

Patagonia, of course, nailed this challenge back in 2011 with their audacious *'Don't buy this jacket'* Black Friday ad. But what does a path through the seemingly nonsensical look like for less exceptional brands? A look back at 17th and 18th Century fashion in Europe perhaps holds the key - this was a time when clothes were among the most expensive things families would own, with life cycles

DON'T BUY THIS JACKET



that lasted decades. But they were also clothes made to be unmade, with people changing their looks and adding personal touches via alterations, reshaping things, and tweaking. A ribbon here, a newly nipped-in bodice there.

While this 'less is more' approach is far more of a challenge for fast fashion brands, it does offer higher-end brands a rich seam to mine. Companies including Net-a-Porter, Ralph Lauren and Mulberry understand this and have embraced partnerships with alteration services (no doubt to cash in on an opportunity worth billions by bringing refurbishment services in-house) and introduced recycling credits and durability guarantees. Others have started to communicate the notion of "trendless fashion", including Gucci, which reduced its fashion shows

from five to two each year with a commitment to showcasing seasonless collections, and Salvatore Ferragamo, which created a "future-proof" collection, with creative director at the time Paul Andrew calling it "an explicit rejection of fashion's cycle of enforced obsolescence, a cycle which I strongly believe is itself now obsolete." (However, in a classic example of grand statements not fully supported by actions, it's worth noting that Ferragamo's sustainability rating from anti-greenwashing platform Good on You is just 2 out of 5, based on progress against the company's stated commitments).

What seems undeniable is that iterative add-ons to fashion brands' messaging around sustainability won't work for much longer: As a task force of

fashion luminaries convened by the New York Times' Friedman last December agreed: the goal of sustainability can't happen without fundamental changes to the business model - the fashion industry as a whole will surely have to shift to focus on profitability (with purpose) versus exponential growth. And importantly, brands will need to communicate that they recognise the need for such an essential change and lay out how they intend to get there.

"Things shift more slowly now, it doesn't feel right in the context of sustainability to constantly be changing styles and trends".

Jess Cartner-Morley



Conclusion

The world of fashion in 2023 is a dynamic and ever-evolving landscape shaped by a complex interplay of societal, political, and psychological forces. Far from being a mere expression of personal style, fashion has become an increasingly powerful tool for conveying identity, challenging norms, making political statements and demonstrating values.

Fashion brands must adapt to these shifting dynamics by aligning themselves with the values and aspirations of their consumers and embracing authenticity, transparency, and humility in their marketing. As the industry evolves, only the brands that remain agile, responsive, and committed to positive change - and communicate all this in engaging ways - can expect long-term success in this highly competitive marketplace.





If you would like to discuss any of the issues raised in this report and the implications for your brand, please feel free to drop our managing partner Alex a note at

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