

DIGITAL FASHION FOR SUSTAINABLE CHANGE

APPENDICES

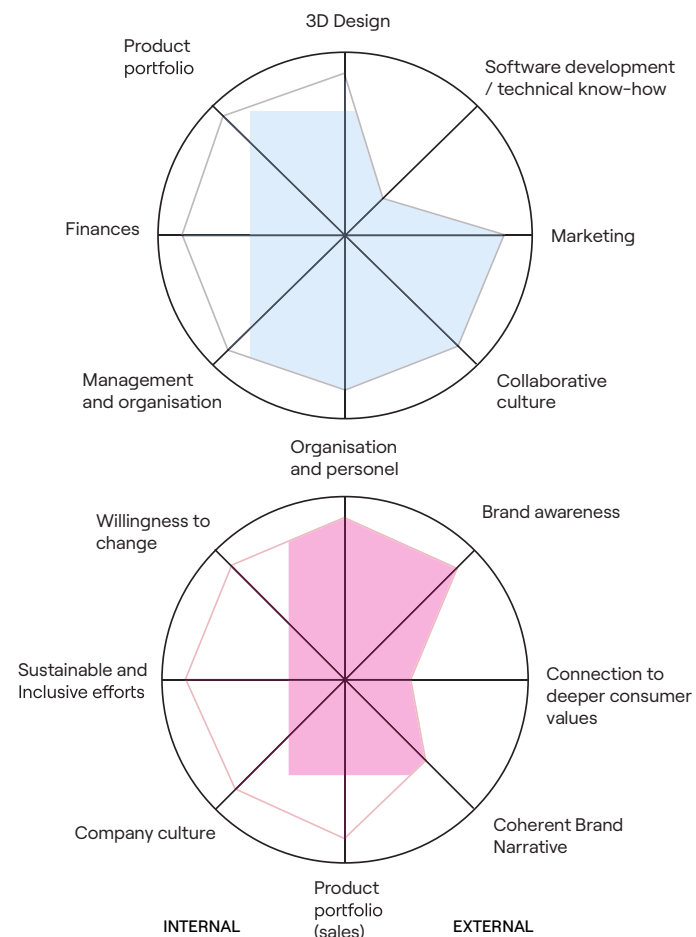
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BRAND ANALYSIS

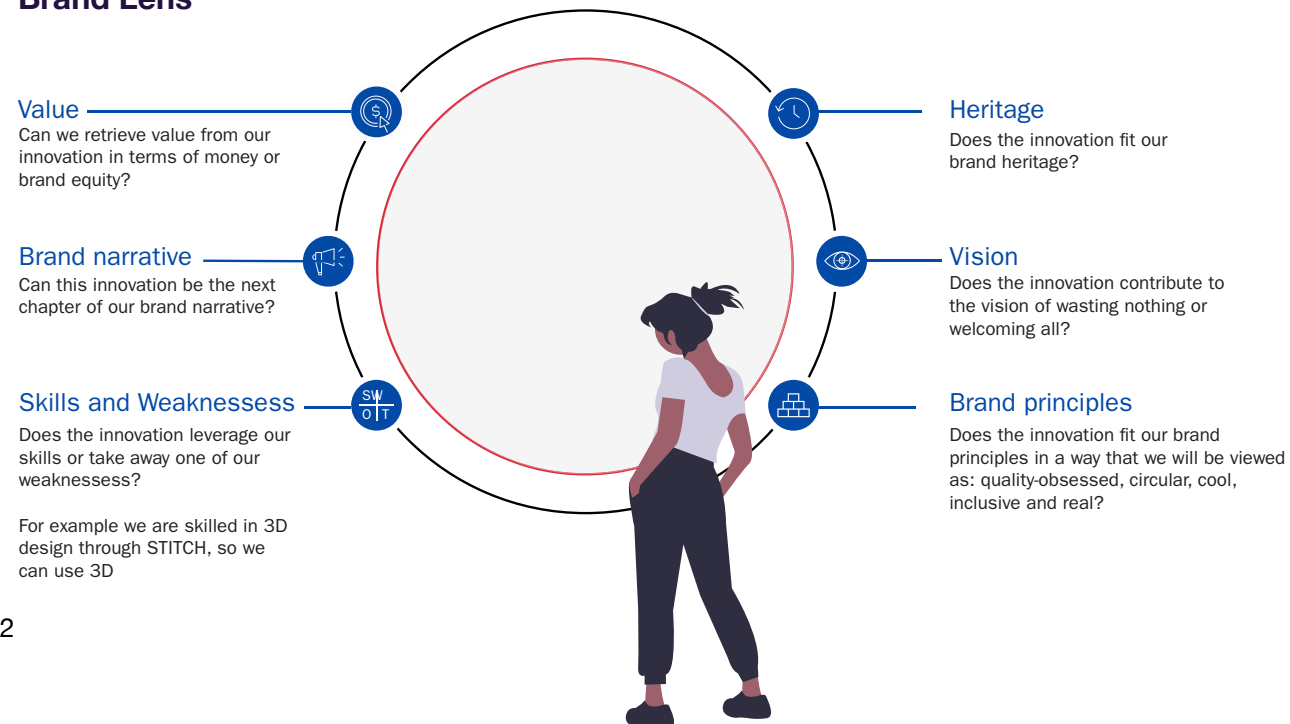
Core competences

- High quality physical products
- Inclusive product portfolio
- Products for the entire family
- Strong brand building blocks (iconic colours and logo)
- Strong brand heritage
- 90's HipHop and music association
- Open to innovation / willing to change
- 3D design
- Strong relationship with state-of-the-art startups (incubators)
- Global distribution range

Strategy wheel

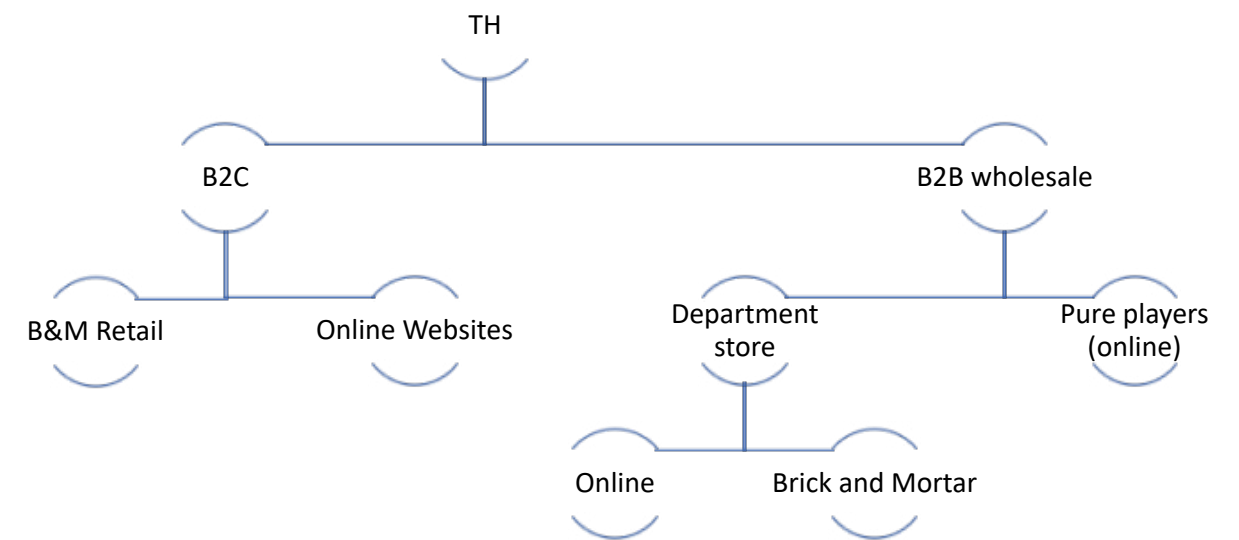


Brand Lens

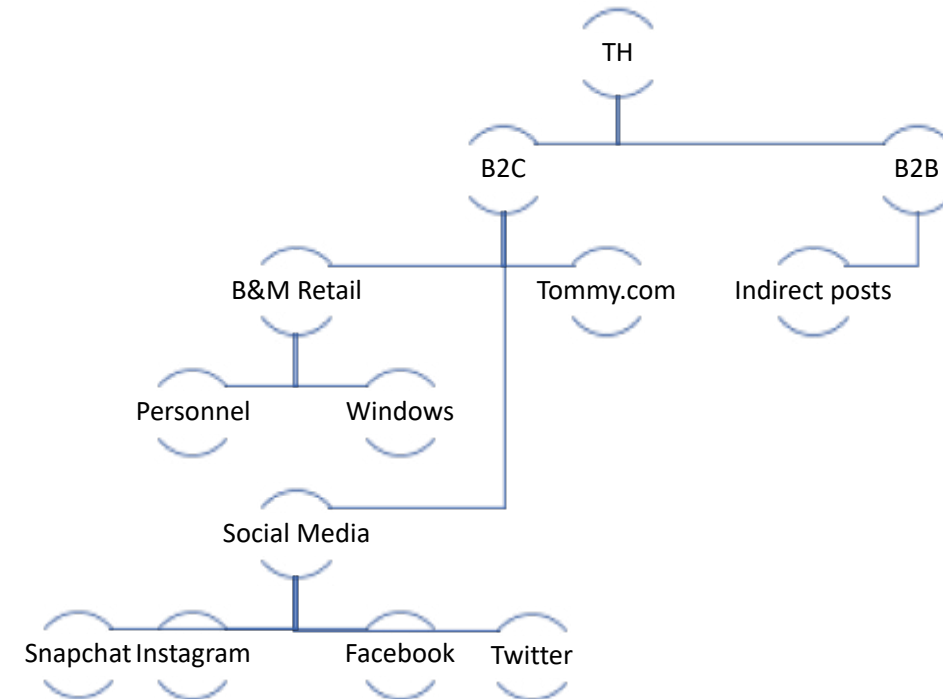


Touchpoints

TOMMY HILFIGER SALES CHANNELS



TOMMY HILFIGER COMMUNICATION CHANNELS



This appendix features the insights of a focus group around the narrow topic of “online interaction and appearance”. The group consisted of four girls (21-23 yo), and a boy (22 yo).

Participants were asked to keep track of their activities 3 days before the session around this topic. The session consisted of two sections. The first section used several brainstorming and drawing techniques in order of the ‘path of expression’ with a main focus on interaction, (identity)presentation and social media usage. The second section used the choice for certain outfits per channel to discover the deeper ‘latent’ needs

Section 1:

1. Present: First a generative collaging exercises was used to describe what they find important in online interaction and appearance, with their track-record as inspiration. Their task was to create a visual that represented ‘People and I on the internet’. Participants were encouraged to use visuals, emojis or text. The collages were presented to one another and a discussion was started.
2. Past: Second, all channels the participants had visited for interaction or visual presentation (appearance) purposes were shortly discussed. Similarities and differences were clarified. Participants were asked the last time they had interacted with people via that channel, and what was striking in these situations. Break game: To probe participants with the fundamental needs, a short competition was held where they were asked to match a selection of the poetic descriptions (appendix 1) to a set of pre-selected pictures. Nuances and questions during they game in case of unclarity were quickly discussed.
3. Future: Brainstorm carousel per channel. Participants were asked to write down associations, problems, experiences and dreams for each type of channel.

Section 2:

Most of the session (+ -45min) consisted of exploring the connection between fashion and online presentation. Participants were given 5 minutes to choose a garment that best ‘fit’ each of the pre-studied and analyzed social channels. Due to the short time frame they were forced

to follow their intuition. After this, everyone extensively presented and discussed the choices made: whether they shared the reasoning or not.

This process provided interesting insights into (a) the value people attach to their appearance in the presence of different audiences, (b) the sought-after characteristics of these outfits (c) the influence of time, location, audience and channel and especially (d) the dilemmas that accompany them.

The following main insights were retrieved from this focusgroup:

The activities they mostly do online, with a significant increase since the pandemic in bold.

- Socializing via chat or temporary photo-platforms – WhatsApp, Snapchat, Instagram chat/stories
- Socializing or meeting via video calls - Zoom, Facetime, Hangout, House Party etc.
- Scrolling through their social media accounts – Instagram, TikTok
- Exercising at home – YouTube (Pamela Reiff, Sammi Clarke), Nike app
- Experimenting with new hobbies like cooking and painting – Pinterest, YouTube, TikTok
- Watching Netflix
- Browsing and shopping

Values

1. Sustainability is a hot topic, woven throughout their entire lives. ¾ have turned vegetarian because of the environment in the past 2 years and all participants want to work in companies that actively work on sustainable solutions.
2. Although they are aware about the polluting character of the fashion industry, they still have a hard time incorporating it in their day to day actions as they don’t want to compromise for style. They like the idea of vintage and resale, but still prefer traditional retail/ecommerce for convenience, fit-reliability and visualization reasons.
3. Once a topic gets picked up by the crowd on social media, it increases social awareness and spark value-discussions in real life. It’s a place for information and inspiration.
4. Find it normal but important that everyone is accepted, and admire people who show their

true selves such as women that advocate body positivity or transgenders sharing their stories. At the same time they still have a hard time expressing their selves completely honestly, worried about the social backlash.

Interaction

1. Spontaneous communication happens mostly with their inner circle, as soon as there is interaction with people outside that circle there is a need for preparation.
2. Most online contact with is with like-minded people, sharing most personal and honest content (like selfies) only to people in their inner circle.
3. They feel connected to the people who share the same values.
4. Have a hard time exposing their ‘true self’ online as their audience is big and mixed, they worry about the backlash. They want to stay ‘cool’ to all.
5. Snapchat is the digital version of the pub; they feel the freedom to be spontaneous and crazy because it disappears. This way they can prevent backlash while still fooling around.
6. In general they want to deviate from everyday routine (lead an interesting life), this has become harder due to the pandemic so they have started looking for opportunities to ‘forget’ reality by playing games, group-calling with friends and picking up old computer games like SIMS.
7. “I feel like I watch more on the internet and do more in real life. I use it especially for inspiration, entertainment and connecting with people. Friends of mine, and younger people are more actively engaged with the internet though, they play games and create stuff”

Digital Appearance

1. Don’t spend a lot of time processing other people’s posts, but quickly form their opinion. This realization increases the time they spend on their own posts. Biggest concern is if it will fit the image they have so carefully portrayed.
2. Like clothing, they use their social channels as a translucent means of communication, portraying parts of their interior world they want to be seen.
3. They especially value appearance when they meet people they don’t know very well yet. “When I go out, I always make sure I dress normally and nice” They are looking for comfortable and versatile

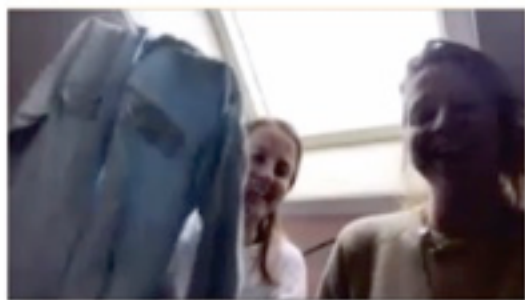
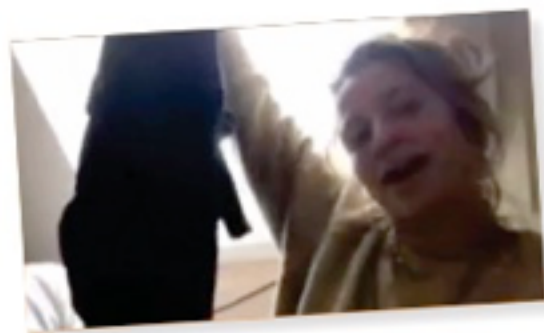
clothes at home, which they can use for both formal and informal moments (in video calls)

4. Social media is their go to place for inspirations. They take inspiration from influencers, brands, creative accounts but also from friends and acquaintances.
5. There is an increasing interest in smaller ‘grounded’ influencers that they can relate to. Often they consider these people ‘hidden gems’, and copy their ideas or style as if it were their own.
6. Exposure is often short-lived, so it should be striking. People want to show their best side.
7. They feel confident through the outfits they wear, especially new outfits strengthen their self image.
8. Clothing is chosen based on personal style and aesthetic preferences, but the influence of friends is acknowledged. Their main concerns are about the fit of the apparel, and whether or not it flatters the body in real life and on pictures.
9. Posts only make the cut when their appearance is ‘fitting’, outfits are preferable only posted once.
10. Variety of appearance is important in all forms. They want to show their diversity; to create an image that is as “real” as possible as they feel a person has several sides/identities and cannot be pigeon-holed. These multiple sides make someone authentic.

Authenticity

1. What you post must match your image, otherwise it is seen as pretentious.
2. They are aware that their online exposure influences their (future) professional life. Funny, weird or prejudice-sensitive (e.g. student associations) content is mostly posted on temporary or closed channels like Instagram stories or Snapchat and whatsapp.
3. At the same time they use their open-exposure as an opportunity to show their entrepreneurial spirit, creativity and assertiveness. “I like to show what my passions are, what I’m good at and the activities I enjoy doing, that is what defines me” – Sybren 22
4. Creativity is fostered and admired. Showing personal work is seen as a brave act, as it truly reflects someone’s inner self. It is perceived as scary but exhilarating at the same time.
5. Entrepreneurial spirit on social media is embraced. Even when they don’t like the aesthetics or products being sold, they think people who create and share

- their passions are cool.
6. Filters are sometimes seen as the 'easy way out', pictures that are pretty by itself are preferred.
 7. "I wanted new clothes, and I always like it when other people give their opinion about it. Other people are eventually the ones that have to look at them, not me, so it is nice when they like it. But of course you have to like it yourself first" – Sybren 22f
 8. I think filters are fun to play around with. Filters are nice as they make pictures "more beautiful" but I also like to keep it real. Because it is easy to make things more beautiful with filters, but then it immediately looks a bit fake.



3

GAMING OBSERVATION AND INTERVIEWS

One of the first use cases of digital fashion are the outfits avatars wear in games, called 'skins'. Three in-depth interviews were held to research how the skins create value for the consumer and what value is created and desired. The sessions lasted around 1,5 – 2 hours, and consisted of an observation part and a semi-structured interview. Insights from all observing sessions and interviews are gathered and described below.

The participants sat down with me under the impression that they would 'teach me to game'. In the mean time they talked me through their usual routines, shared past experiences and future dreams. In their 'natural habitat', playing at the time of observation/ interviewing they could easily go back to earlier memories, paid no attention to me while taking notes, and seemingly felt no pressured to answer 'correctly' to questions.

*Participant A: F, 11 yo, Amsterdam (virtual interview/ observation)
Hobbies: drawing, hockey, gaming and dancing.
Doesn't identify as a 'gamer'.
Games: Fortnite, AnimalCrossing, Roblox, ...
Devices: Nintendo Switch, Playstation 3, PC, Ipad, Iphone. Plays mostly on Iphone and Ipad, but Fortnite on PC (due to Apple restrictions)
Last year of primary school*

*Participant B: M, 21 yo, Delft (physical interview/ observation)
Hobbies: Football, gaming and 'hanging out with friends at home'. Identifies as a 'gamer'.
Games: Fifa, Runescape, League of Legends, World of Warcraft
Devices: Xbox, PC
Student Economics.*

*Participant C: M, 13 yo, Utrecht (virtual interview/ observation)
Hobbies: Hockey, chilling, chess
Games: Fortnite
Devices: Tablet, Samsung Galaxy
Second year of high school*

Value of fashion in gaming

The way value of cosmetic products in games is created and maintained is analysed in framework x: Value creation of fashion in gaming (next page). This framework describes three levels that play a role in value creation: the context in which the avatar finds itself, the product features, and the needs it satisfies. Each level contains a set of variables that influence the perceived value of the virtual cosmetic. It strongly resembles the way social media and physical fashion gain and maintain their value, and are therefore used as inspiration for future digital fashion solutions.

Context level

To what extent consumers recognise the value of virtual fashion for their avatars depends on 5 characteristics: , to what extent they get (dis)approval of others, the variety of products available, the amount of time spent in the context, frequency of visits to the context and finally amount of time a person sees themselves or their avatar. These characteristics can be used as selection criteria when evaluating new contexts for digital fashion. Not every characteristic should necessarily be maximised, but the more a context checks the boxes, the bigger the value.

For instance, if we would like to sell digital fashion to working women, we would recognise that Zoom is an interesting place as they currently spend most time working remotely, join zoom calls each day, and are confronted with their own appearance during each session.

Product level

On a product level, 7 value drivers are identified that influence the perceived value of a virtual product. The drivers are used as inspiration for the design of a digital fashion product/service.

These categories should be viewed as answers to the question "Why do you want this particular product":

Needs level

Each product driver links to a set of fundamental needs it satisfies.

4

FUNDAMENTAL NEEDS

Fundamental Need	Sub-need	Interpretation A: "I want to..."	Interpretation B "I want to..."	Interpretation C "I want to..."	Examples of need fulfillment	Pushed, can lead to:
Autonomy	Freedom of decision	Be my own boss / be free to make decisions on my own	Be able to go against other people's opinion for something I believe in	Know what my options are	Being free to make your own decisions in life	obstinate
	Individuality	Be independent	Be able to think freely without limitations of others	Be able to fix things on my own	Going against other people's opinion for something you believe in	antisocial
	Creative expression	Give shape and content to my art as I see fit	Dare to deviate from the status quo	Be able to use creativity in my life's actions	Being able to use your creativity in your life's actions	
	Self-reliance	Be able to take care of myself	Stand on my own two feet	Foresee dangers and act accordingly		
Beauty	Unity and order	Experience unity and order	Enjoy the calmth and beauty of a organized, ordered or sorted things	see or wear things fit together aesthetically	Enjoying the beauty of a well-designed garden	extravagance
	Elegance and finesse	Be graceful and stylish in appearance or manner	Make it feel like what I do is effortless	Own , carry or see elegant products	Being moved by fine arts	Over-groomed
	Artistic experiences	Submerge myself in aesthetically pleasing or sense-stimulating experiences	Enjoy beautiful products and the effort/craft/skill put into them	See, own and experience beautiful things	Being pleased by the details of an elegantly crafted piece of furniture	
	Natural beauty	Find / express natural beauty	Make it feel like what I/it look(s) like is effortless	Be beautiful (for a convenient/easier life, to attract people/mate?)		
Comfort	Peace of mind	Be free from worry	Relax	Trust life / Believe all will be alright	Sitting back in your chair at the end of a hectic workday	Indolence
	Convenience	Things to be easy to do/get	Put little effort in getting something done	Walk the path of least resistance	Having someone else organize your entire home moving	Hyper-sensitive
	Simplicity	Things to be clear and straightforward	Understand things easily		Filling out a simple and clear form	
	Overview and structure	Be able to quickly/easily assess information	Stay focused on the important things			
Community	Social harmony	Experience mutual respect	(Respectfully) live side by side with the people around me	Live peacefully according to the socially accepted rules of an environment	Beig part of a group that you can rely on, like family	Submission
	Affiliation and group identity	Feel a sense of belonging to a group of people	To experience a confidence from the people around you		Behaving in accordance to the rules and values of your group	Mindlessness
	Rooting (tradition, culture)	Feel connected to others through empirical experiences or origins			Identifying with a certain group (i.g. prrofession, club, country)	
	Conformity (fitting in)	Be accepted and appreciated by others in the group I identify with	Be appreciated by the ones I appreciate	Have others identify me as part of a group, I identify myself with aswell		
Competence Add: self-efficacy?	Knowledge and understanding	Know what I'm doing, and why			Winning a tennis match	Perfectionism
	Challenge	Being challenged in what I do	Be able to fight for something	Work towards victory	Managing your rfinance well	Control-freak
	Environmental Control	Directly affect the events around me	Be in control (De touwtjes in handen hebben)	Feel you're writing your own book/history	Believing that you are a good parent	
	Skill progression	Notice I'm getting better at something	Actively learn new things			
Fitness	Nourishment	Be satisfied and nourished			Feeling energetic after physical exercises	Health-freak
	Health	Be, or feel healthy			Feeling fit after a good night's sleep	self-indulgence
	Energy and strength	Feel energetic and resilient, mentally and physically	Feel fit and strong		Feeling satiated after a nutrious meal	
	Hygiene	Take care of myself physically	Take time for self-care	Feel clean and hygienic		
Impact	Influence	Influence what others do or think	Have an effect on something or someone (character, development or behavior)		Seeing everyone happy at the party you organized	megalomania
	Contribution	Feel I'm contributing to something	Experience being part of a movement	Experience having an effect on a development	Seeing your letter to a newspaper published	meddlesome
	To Build something	Create something	Develop something		Seeing your garden develop	
	Legacy	Write history	Look back on what I have achieved			
Morality	Have guiding principles	Know your boundaries	Treat others the way you want to be treated	Live by your personal beliefs and values	Fulfilling your duties as a father	zealotry
	Acting Virtuously	Live according to high moral standards	Knowingly do the right thing	Behave altruistically	Seeing that a game is played fairly	unforgiving
	A just society	Strive for / expect / want equal opportunities for everyone			Passing on the value of generosity to your children	
	Fulfilling duties	Live up to the expectations of my role	Fulfill my duties	Do as I promise		
Purpose	Life goals and direction	Realise dreams and aspirations	Know your actions add up to a higher end goal	Know what you are doing it for	Finding meaning in life through rerligion	restlessness
	Meaningful activity	Feel useful	Feel like your contributing to the happiness of others	Work toward a goal I find important	Knowing where a relationship is going	madness
	Personal growth	Increase my selfconsciousness and selfknowledge	Develop and utilize personal skills and talents	Better my quality of life	Spending time to keep up with world affairs	
	Spirituality	Be conscious	Be inspired	Find and follow your belief system		
Recognition	Appreciation	Feel people appreciate or desire my presence	Know that I matter	Feel thankfulness from others (for my actions), know that others are proud of me	Being commended for your volunteer work	attention-sucker
	Respect	Be admired for my ideas or qualities	Be treated nicely / politely	Be taken seriously	Getting positive attention with your new clothes	pretension
	Status and prestige	Others to look up to me / impress others	Be admired by others	Distinguish myself with my successes	being treated politely at a store	
	Popularity	Be liked, admired, or supported by many people	get positive attention	Have a lot of friends / people who want to be friends with me		
Relatedness	Love and intimacy	Feel deep affection or sexual love from someone	Feel safe with someone	Have people in my life who exactly know who I am	Having close contact with people that you care for (and care for you)	over-dependance
	Camaraderie	Have a special relationship with people I find important	Experience mental trust and friendship	experience loyalty from others in a group	Having a special relationship with people that are important to you	separation anxiety
	To nurture and care	Care for and protect what/who I find important	Be cared for	have a social safety net	Having people in your life who know exactly who you are	
	Emotional support	Feel empathy and compassion from others	Know others concern about my wellbeing	be supported in my thoughts and dilemmas		over-protetive
Security	Physical safety	Live in a stable and safe environment	Feel my environment keeps me safe from physical harms/threats		Having enough money to face potential crisis	fear of change
	Financial security	Have enough money to face potential crisis	Have peace of mind, and experience certainty in my financial situation	Know I can cover my expenses (now and in the future)	exersing familiar habits and rituals	
	Social Stability	Have stable social ties	Have a life structure and a reliable routine		Living in a stable and safe environment	
	Conservation	Know where I stand	Be ready for variables because of the presence of constants in life	Exersize familiar habits and rituals		
Stimulation Add: Escapism?	Novelty	Be amazed/surprised	Find new rewarding experiences (improve future life)	Explore and Learn	Gratifying the senses (e.g. enjoying good food)	thrill-addiction
	Variation	Deviate from everyday routine (lead an interesting life)	Seek distraction and relief from unpleasant realities	Test various options (to find the best one)	Having stimulating aesthetic experiences (e.g. art)	substance-abuse
	Play	Have fun, laugh and experience joy	Stimulate our imagination	Relieve stress	Going out to a new club	
	Bodily pleasure	Gratify all 6 senses (e.g. art, food, sex...)	Feel alive (and experience life's limits)	Have stimulating aesthetic experiences (e.g. art)		

5

INSIGHT CLUSTERS

A combination of the consumer insights gained from the interviews and focus group, and larger trend research.

Cluster 5: Ways to escape

In our increasingly stressful society, people are seeking new forms of mood alteration and an easy escape from reality (FI, 2020). As people increasingly work from home, and the pandemic put restrictions on physical travel, this search only grew. People try to find ways to deviate from everyday routine, and lead an interesting life. Form. The average monthly searches for “virtual” grew +235% (may 2020 vs 2019), as the lockdown forced virtual experiences to become the new real for consumers, businesses and institutions. With facebook launching its stand alone \$299 USD Oculus Quest VR glasses back in 2020, the standalone sector saw 19% growth (Graham, 2021). Facebook expects VR to be the next social platform.

In this search, they join virtual experiences to escape home together. Video-calls offer the opportunity to connect with the ones we love, and virtual (gaming) experiences even to meet people outside their inner (daily) circle.

“When you’re always in the same location, you need to sort of fake the location shifts” (Rich, 2020)

People will always travel to recharge, experience new adventures and meet curiosity needs. The only question is, in what form? Virtual games like Roblox and Fortnite became a place for organizing remote, live events like fashion shows, concerts and conferences (Fortnite and Roblox).

Important to note is that the most popular video games are infinite (FI, 2020). They are online worlds, where players can participate whenever and for however long they like; truly ‘living’ in - or escaping to - the virtual space.

Underlying fundamental needs: Comfort, Relatedness, Stimulation

Cluster 6: Sociability of games

Millennials & Gen Z use gaming platforms as social networks to play but also to connect with their friends. The immersive nature of the gaming world attracts Gen Z to socialise and hangout anywhere they want, and is becoming ‘more social’ than traditional social media because of its intuitive nature.

A big increase can be seen in the amount of users on platforms focusing on socialising rather than competition elements such as Fortnite Party Royale (350 million active users), Roblox (150 milion monthly active users) and Animal Crossing: New Horizons (62,7 million)

Underlying fundamental needs: Community, Stimulation

Cluster 7: Authenticity is uniqueness

Humans want to be unique (Maslow, 1954). The concept of authenticity is changing and gets an extra dimension from merely being real and true, toward being unique. 1 in 3 Gen Zers says, “I would rather be considered unique than real” which is complete pivot from their previous generations (Davies, 2020). Their large online networks and exposure to global trends make it difficult to stand out; admiring unique people and experiences even more. As Simmel (1950) put it: “People define and are defined by that which they are not”.

Fundamental Needs: Beauty, stimulation, Impact, Recognition

Cluster 8: (Artificial) Dreams can be created

If you can dream it, you can create it. Opportunities to experiment and express online are endless, and Gen Z experiences more safety, control and autonomy online than in real life (Rich, 2020). People always desire to realise their dreams and aspirations, and with Gen Z's digital skillset they can do so, be it virtually. Tech realises their fantasy worlds and ideal identities.

They use digital tools to enhance or experiment with their online identities. People are increasingly aware of this ‘fake’ content, but don’t always mind as long as it entertains. This acceptionation of ‘fake’ can be seen on social media where people increasingly use beauty filters, or interact and follow synthetic media figures such as @ilimiquela and @shudugram as real ‘life-influencers’. In a way they are seen as more authentic than human influencers as they don’t to pretend to live . “I just think it’s good content. But most of the time it is

staged a bit, because the content is just too good. It has to be. But I don't mind, as long as it's funny" (lucy,11).

In virtual worlds they experiment with different identities even more freely. Dressing up their avatars in different outfits, changing facial and body features or even gender. Interestingly skins are seen as 'the avatar' rather than the outfit of the avatar ("if you are a default skin, if you are a base skin etc").

"One thing that happened a lot is gender change. It's freedom. It's redesigning your own personality. It's less about the 'big boobs/big lips' thing where we try to mimic the physical ideals of beauty, but it was much more about redefining what beauty means to you, and creating something that is recognizable but even a bit quirky or strange. A new own direction." – Adriana Hoppenbrouwer about their digital twin user research. 3D is a place of freedom, and shouldn't replicate reality. That's what photography already does. When you are in the 3D space, that is when you can be anybody.

Underlying fundamental needs: Stimulation, Autonomy, Beauty

Cluster 9: Experimentation is key and fun.

Both on social media accounts, and in virtual gaming worlds is experimentation with their looks key. Be it to test what other people think, or to see if they still like the posts (if it still fits their identity) after some time. People watch videos on YouTube and Twitch to increase their skillset, mix and match avatar outfits and take multiple pictures to see which ones get most likes, all in all: you can't learn how to drive by watching someone do it. "Sometimes I watch Twitch to learn tips and tricks, and hacks!"

Fundamental needs: Competence, Community and Recognition

Cluster 10: The young are king and free online.

When faced with consumption barriers, gen Z is able to utilize their advanced tech skills to overcome restrictions set by higher authorities (e.g. parents or teachers) at a much younger age compared to their previous generation. Examples are installing a geo-VPN to play games at school, or secretly adding their fingerprints to their parents phones (Protein Agency, 2020).

Fundamental needs: Autonomy, Competence

Cluster 11: The malleability of man

(Artificially) crafted images and identities online shift our image of 'realistic' humanity. These images have shifted the generations' view on beauty, and has created a feeling of 'malleability of man'. Millions of people edit their photos online to meet conventional beauty standards using filters or editing apps (especially in China) (Ewe, 2020) and as video calling (informal and formal) has skyrocketed since the pandemic, people are constantly confronted with their own face, the requests for plastic surgery have skyrocketed along (Meeson, 2020).

Synthetic stars (like @lilmiquela) are a new type of influencer, whom can be given any desired beauty ideal, and would never say/do anything off-message, unless it was planned. Interestingly enough they are created to be more human than most models are presented in magazine after endless photoshopping and retouching.

Fundamental needs: Beauty, Recognition

Cluster 12: Generation of creative beings

Tech realizes fantasy worlds; From an early age technology has encouraged Gen Z to make their ideas become a (virtual) reality in games like Minecraft, creating content for TikTok, streaming on Twitch, or even giving a personal story to the avatars they live through. They were raised to have a wide imagination and aren't yet bound to borders of reality. Moreover, children experience more safety, control and autonomy in virtual worlds than in real life that enhances this creativity (Rich, 2020).

"Suppose you have the map, and then there is a castle and that is mine, and I am Lucy the queen of the island"– Lucy, 11

This push for creativity also goes beyond the digital domain. Customization of products have been around for some time already, giving consumers the possibility to put their personal touch and join the creative process. With the advancements of cheap 3D-printing and Micro-factories (Future Today Institute, 2020), scalable personalization and on-demand manufacturing opportunities only increase, as will the creative freedom of children.

Gen Z recognizes their creative power as well, changing their relations with brands. They want to connect and collaborate with brands, opposed to merely consume. They want to create a better future together and feel like they have a purpose and impact. (Interview Hoppenbrouwer; YOUTH IN PANDEMIC, 2020)

Fundamental needs: Autonomy, Beauty, Stimulation

Cluster 13: A peek into the creators' process.

There is an increasing desire for a peek into the creator's process on channels like Twitch and Youtube, ranging from (music) artists and chefs to gamers. To date there are 900 Million 'viewers': people watching other people play games on platforms such as Twitch (Lafayette, 2020). Twitch is even evolving beyond its gamer roots, offering a home for young artists live-streaming their creative process (Irregular Labs, 2020). When watching, their crave for newness is key.

[on artist process] "I just like to watch I guess, it can be so satisfying!! .. I watch something different every time, otherwise it will be boring" – Lucy, 11

Interestingly, gaming content on Twitch is centred around the self-expression and social needs of the individual, not only their technical gaming ability (Plug and Play, 2020).

Fundamental needs: Stimulation

Cluster 14: Nostalgia

Consumers are increasingly nostalgic about pre-pandemic experiences (trendhunter) Restaurants are still the place where peoples' social life takes place, landmark events are celebrated and for learning about the different cultures that make up a community (Guardian) People are still looking for physical contact and experiences

Underlying fundamental needs: Stimulation

Cluster 15: Enabling low key communication

A new visual language arises among Gen Z. By sending emojis, memes, selfies or photos of surroundings, a social interaction with less pressure is allowed. This language is highly symbolic and community-dependent, which creates a sense of belonging if understood but

also makes it more difficult for people (or brands) to connect. Temporary visual content (Instagram stories or Snapchat) even increase this effect. The knowledge that something won't backfire combined with the fact that a picture/visual 'says more than a 1000 words' lay a foundation for subcultural languages.

Underlying fundamental needs: Relatedness, Community, Stimulation

Cluster 16: We dress to belong

We value our appearance the most in places and at moments we encounter people we don't know very well yet, or whom we want to impress (work, acquaintances, crushes). This is true for the physical worlds as well as the digital. Like clothing, they use their social channels (and the outfits they wear on pictures) as a translucent means of communication, portraying parts of their interior world they want to be seen and to show in what way they want to be identified or associated with. Also in virtual (gaming) worlds, social codes and a sense of belonging arises:

- "In the digital realm it is about curating yourself for some kind of social connection"
o Adriana

Underlying fundamental needs: Beauty, Community

Cluster 17: Handling the information overload

Content algorithms (e.g. TikTok for you page) are welcomed with open arms because of their ever-improving accuracy and convenience factor; serving them tailored content on a silver platter. Due to this instant accessibility, there is no need to explore thoughts independently and in-depth, causing Gen Z to become surface level experts (Protein, 2020). The more choice a person has, the less likely (s)he will decide.

At the same time, they watch the info fed to them on 'stand-by mode', where only strong repetition or extreme/unexpected content stands out, no matter the creator.

Underlying fundamental needs: Comfort, Stimulation

6 FACTOR PROCESSING

In these screenshots the construction process of the new future context is shown.
The original Miro Board can be retrieved via this link:
https://miro.com/app/board/o9J_khKIKxA=/



Figure 1 Overview of all trends, developments, states and principles gathered

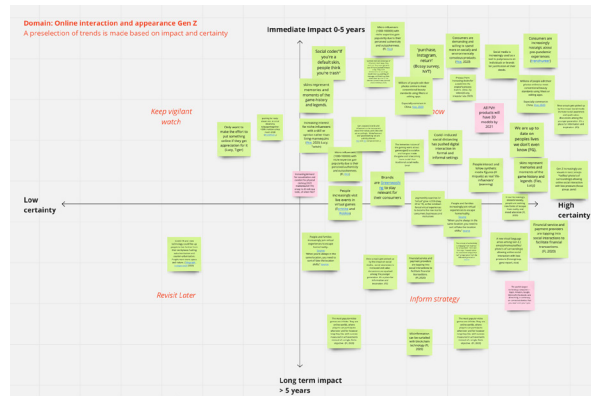


Figure 2 Pre-selection of trend-factors



Figure 3 Final selection of all factors based on originality and relevance

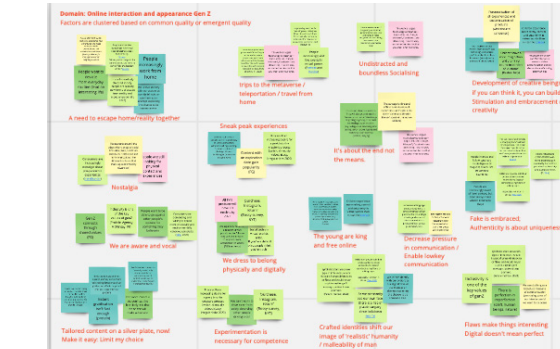


Figure 4 Initial clustering of factors

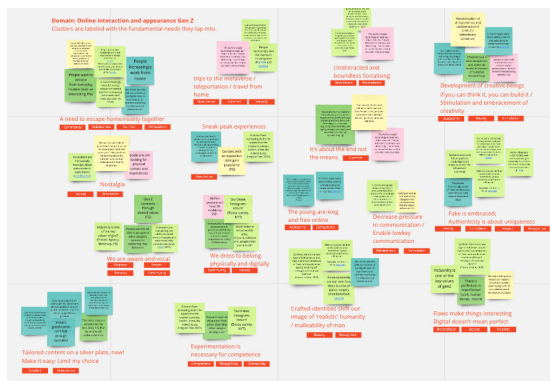


Figure 5 Clusters are labeled with fundamental needs

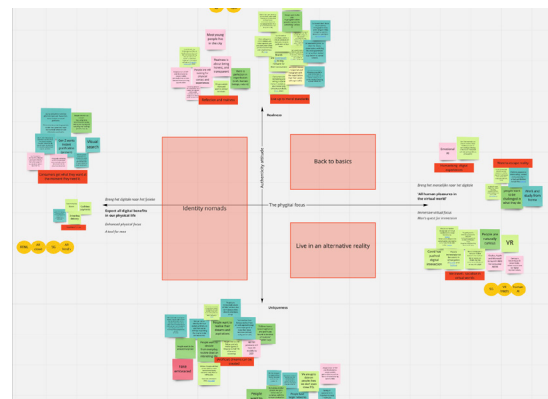


Figure 6 Axes constructed based on common needs

7 FUTURE CONTEXT FRAMEWORK

An image of the future context can be created by reviewing the relationships between the clusters. A framework is created that shows the relationships between these clusters along two dimensions; Gen Z's perception of authenticity, and the phigital focus. Each dimension has two opposing forces, that together make up a coordinate system with four quadrants. These quadrants represent four different world views of our future domain.

X-as: Phigital focus

In light of the pandemic, digitalisation has accelerated beyond expectations in all aspects of our lives. And even though some of the millennials are still catching up with installing our virtual backgrounds on zoom; In 5 years-time to Gen Z, there is no such thing as a digital and a physical world anymore. The two are merging into one phigital experience.

However, the way the world's blend can be approached from two angles: man's quest for immersion on one hand, and the search for an enhanced world that is more convenient and efficient on the other.

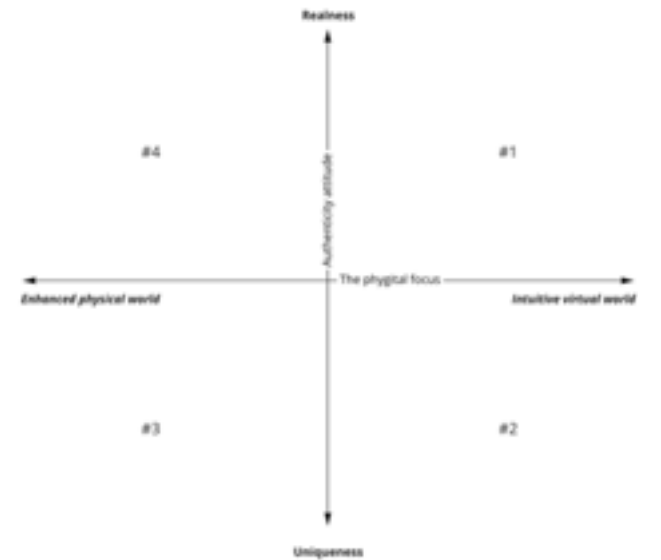
1. Man's quest for immersion

On this end the phigital focus lies on immersing oneself in the virtual environment. Be it in fantasy games, real world copies or via remote working environments; people are looking for ways to immerse themselves in the virtual environment. In doing so they try to make all technology more human.

2. Enhanced physical world

People always strive for more efficient and convenient ways of handling things. This end of the dimension combines factors around the 3D visualisation technologies and sensors that enhance our physical world with a digital layer: connecting all things and places in our world through a 3D digital copy.

The technologies are tools for men rather than an end-goal, and are used to make processes, tasks and experiences more efficient, accessible or even fun (through visual overlays). It makes it possible for us to enjoy the benefits of the digital space, in the physical realm. And enables instant spatial gratification: relevant content in relation to where they are, what they're doing anytime, anywhere.



Y-axis: The perception of authenticity

Self-expression of a fluid identity is at the core of Gen Z, with their digital self as an extension of their profile. On the y-axis the opposing interpretations and values of authenticity are mapped out, showing the contradicting value of this generation.

1. Realness

Authenticity is when you show who you really (read: naturally) are, from the inside and outside. On this end people are looking for relatability, proximity and morality. In their search for the truth they're accepting all that is real, and rejecting all that is pretentious or unmoral.

2. Uniqueness

At this end of the spectrum people value uniqueness over realness. Technology such as filters and editing apps are viewed as tools to make things more "individual" rather than "fake." It's embraced because it can enhance their unique identity. In that sense also 'fake' is embraced, they believe it entertains and gives a different perspective.

Design direction

In conversation with the client, it is chosen to follow the direction of the fourth quadrant, 'Carefree controlled expression' for the following reasons:

1. Competitors: Within the domain of online expression most factors (in quantity) are pointing toward the desire to stand out in an alternative reality (see appendix x). This can partly be attributed to the lockdowns and their push toward virtual alternatives of physical experiences, making these trends and developments more salient at this point in time. It is therefore easier to address, but also easier to detect by competition. A quick competitor analysis of possible current and expected competitors shows this same trend (Figure on the right). Especially Luxury brands like Louis Vuitton and Gucci, who's products already have strong links to escapism have a strong position in this area.

"a \$10 Louis Vuitton skin might be expensive in the virtual world, but, if the digital purchase allows you to live vicariously in your favourite fashion designer's clothes, \$10 becomes an affordable luxury"

Only a month ago (Christmas 2020) Tommy Hilfiger has launched their autumn collection virtually in the social game Animal crossing, actively pursuing this direction already themselves. Players are invited to 'Tommy Forest' for a virtual party hosted by an avatar of Mr. Tommy Hilfiger. At the party, users can shop at an indoor Tommy Hilfiger boutique, join winter activities, and plant trees. For each tree planted virtually, the brand plants one in real-life; connecting to the company's vision. This example shows only the beginning of a brands' possibilities in virtual environments. However, as TH's marketing teams are already pursuing this direction, the client was most interested in researching other directions for this thesis.

2. Brand principles: One of Tommy Hilfiger's core brand principles is realness. As the brand seeks ways to strengthen its narrative and communicate its principles through all initiatives, the strategic design direction should lie in either one of the top two quadrants; supporting consumers that share this value of realness. "it's all about finding the right balance between projecting "realness" and giving the freedom to consumers to embrace some extent of "fakeness" as escapism/entertainment. But I feel brands shouldn't encourage

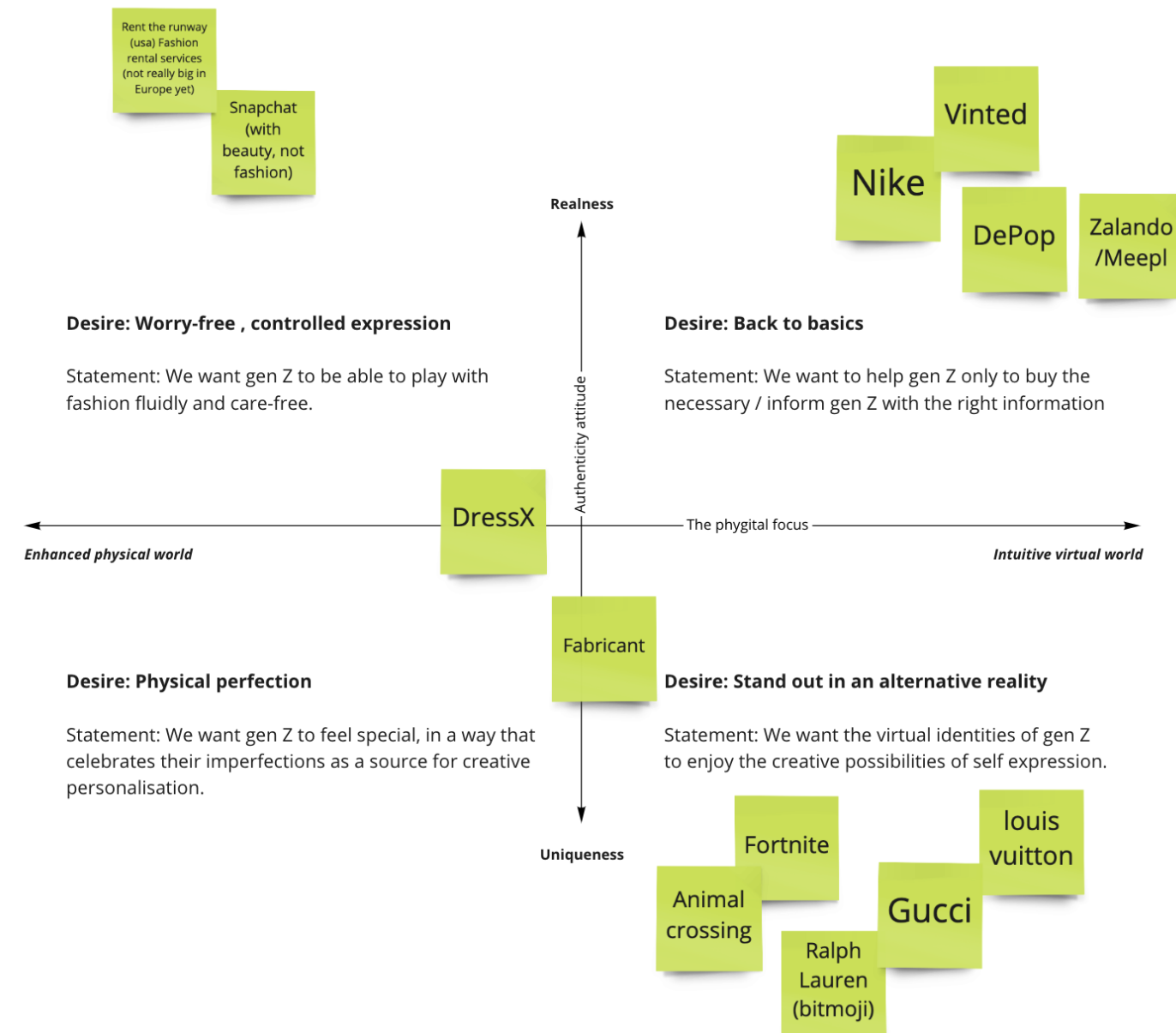
people to be who they are not i.e. causing low self-esteem and other negative repercussion"

3. Excitement: The client was most excited about the idea of fluid dressing; where you can adjust your appearance on the go, depending on your situation or audience.

"Imagine a black dress that can change its silhouette between night and day – You can also digital download new prints for the dress so you can use one dress with different prints & silhouettes. Now what if we design shoes and accessories that can also change shape and you can color match with your dress? We will be selling less physical assets and more digital colors" – TH innovation manager USA.

In addition, there is still very little competition in that area. The biggest threat currently is Snapchat with its beauty filters. Even though Snapchat has years of experience with creating filters, they are mainly focused on bringing fun content, or making faces beautiful. The company does not have any skills in actually "designing products". In addition, PVH already has a good relationship with Snapchat and a history of multiple collaborations. The expertise of Snapchat in this field will therefore be more of an opportunity than a threat.

Concluding; for this thesis it is decided to focus on the fourth quadrant where the main consumer concern is worry-free controlled expression. In the next paragraph a deep-dive of this future context is provide



Future visioning workshop

First a future visioning workshop was organised with the digital innovation team. The goal of this workshop was to secure understanding over the future needs, commitment toward the vision and reduce the natural resistance toward change. First the nuance and relative importance of underlying trends were discussed. Then the consumer needs were discussed, and the employees were led through a step-by-step generative workshop where multiple future visions were formulated on how 'ideal futures', and what role Tommy Jeans could take on. The process and outcomes of this workshop can be found in appendix X.

Key session insights:

- The team wants a connection to current digital initiatives and core business.
- There is a need to connect the physical product to the digital innovations.
- The vision should proceed business optimisation and be bold and inspiring.

"In 5 year time, PVH will only produce physical products based on digital fashion sales demand

- The future visions mainly related to the projects the team was already working on and showed improvement directions from aa business point of view. This outcome was valuable for the team in a way that it aligned them on their current direction. However, for this project we try to identify new directions. Finally, it was decided that a bolder future vision could be taken for this thesis, that pushes the boundaries of what digital fashion could mean for the end consumer.

Time pacing workshop

The goal of the workshop was to:

1. *Get a sense how fast PVH and Tommy Hilfiger generally innovate (within the digital stream), by analysing current time intervals.*
2. *Map key moments and transitioning stages on a timeline (e.g. quarterly market launches or planned launches of current projects)*

Results:

Interval times

1. Two incremental innovations of design value enhancement : 6 months
2. Two new user-centred products/service designs : 2-3 years
3. Radically new value proposition designs: 3 years

In a workshop with the expected development timeline of the technology is mapped out on a timeline before the workshop. This will be presented to give the participants a sense of feasibility over time. Critical opinions toward these technology evolutions will be discussed.

Together we will create and project three strategic life stages on a future timeline, based on the Strategic life cycles model of Simonse and Hultink (2017) shown in figure X. Stages are:

1. Design value enhancement
 - 1) User-centred value creation
 - 2) Value proposition creation

The intermediate steps of the roadmap won't yet present final concepts, but focus on the value proposition Tommy Hilfiger will deliver in each stage, building up to the final future vision in 5 years.