



**AVERY
DENNISON**

Retail Branding and
Information Solutions

NEWNESS
AUTUMN
WINTER

16/
17

BRANDING TRENDS & INSIGHTS

NEIL ELLIOTT

HEAD OF GLOBAL TRENDS & INSIGHTS

- TRENDS PERFORMANCE
- AW 16/17 NEWNESS - PERFORMANCE TRENDS



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01/
01

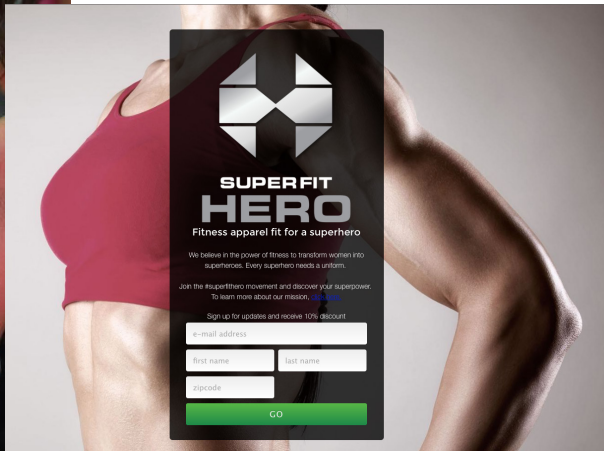
PERFORMANCE

Sweating
like a pig,
feeling
like a fox.

THIS
GIRL
CAN

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Superfit Hero is a line of athletic apparel with a mission to support and empower women. Alongside clothing, the brand is also about creating fun and inspiring content to highlight the unique superpowers of its community.



01: BODY SHIFT

- Healthy is the new sexy
- Explore wider definitions of what women value in sports
- Design function over aesthetics
- Talk to consumers as equals. Don't categorise by gender.

ThisGirlCan is a nationwide campaign developed by Sport England to encourage women to be more active, without the hang-ups of having the perfect body, great sporting ability or wearing the right athleticwear.

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Net-a-Porter, the activewear division of Net-A-Porter, was launched after customer research highlighted a growing interest in sports among women, plus an increasing desire for fitness-related products. Net-a-Porter is clear that the pieces they sell are not only performance-based, but that they can be incorporated into their customers' personal style.

The world's premier online luxury fashion destination

Enter Keyword

WHAT'S NEW DESIGNERS CLOTHING BAGS SHOES ACCESSORIES LINGERIE SPORT BEAUTY GIFTS MAGAZINES

NET-A-SPORTER

YOUR TIME YOUR SPACE YOUR STYLE

Introducing sportswear as chic as everything else in your closet. Smart tennis looks that are anything but traditional, precision running pants, yoga and dance clothes you can really move in and a dedicated area for apres-workout – this is sport with style.

SHOP ALL SPORTSWEAR



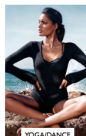
SKI



RUN



GYM &
CROSS TRAIN



YOGA/DANCE



SAIL



TENNIS



02: STATUS WEAR

- Think performance, think lifestyle
- Explore materials/patterns and print to reflect both lifestyle requirements
- Consider 'new denim', as brands look to the full potential of the activewear sector

Fashion meets sports as an increasing number of brands create performance-inspired collections. Brands such as Topshop have collaborated with **adidas Originals** and designers including Alexander Wang continue to blur the boundary between activity/leisure and fashion.

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PERFORMANCE



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The old school idea that yoga was **only for women** and spiritual men is outdated as professional sportsmen integrate yoga into their routines, including top male athletes such as Andy Murray and James Haskell. The rugby player stated, 'I'm not there to get my chakras aligned – I use yoga to give me the advantage in my game and keep me on the field'.

Acne has launched a unisex underwear range that fits both men and women, all in neutral skin tones.



03: MADE FOR ALL

- Design for gender fluidity
- Age is irrelevant as fitness drives activity
- Sports are no longer divided by gender as women seek strength and men pursue flexibility
- Don't think gender, think product need

Recognising the need to design for all, **Uniqlo's** campaign puts real people of all genders, ages and ethnicities at the core of its story.

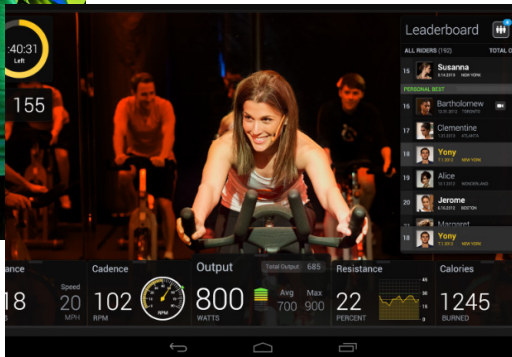
01/
04

PERFORMANCE



Immersive fitness: **Les Mills virtual workouts** use projection technology to transform the gym studio into a truly immersive environment. The sessions – currently for cycling – aim to offer a heightened sense of anticipation and focus thanks to the visceral sensation created.

Peloton bikes bring spin classes to the home or any location with live streamed classes that link via Bluetooth and an accompanying app. Peloton studio rides are streamed live and on demand to the brand's bikes around the world. Users can also benefit interactive chat with the instructor via the bike's interface



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04: IMMERSIVE

- Layer experience to enhance performance
- Technology spurs users to achieve their goals via gaming
- Reconsider traditional fitness 'locations' in favour of experiences that can be delivered any time, any place
- Embrace the 2D to 3D world

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05

PERFORMANCE



Morning Gloryville combines sober clubbing culture with exercise. Starting at 6.30 am participants kick off their day with an energetic club experience. The event is so successful that communities now come together in over 15 cities around the world.

Run an Empire is devised by experience designers and play-makers who believe in the importance of play and engagement whilst exercising. The game encourages individuals to out-run people in their neighbourhood, which helps to develop new communities and local networks in the urban environment as well as encouraging exercise.



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05: COMMUNITY

- Community workouts spark a new competitive spirit
- Workouts are evolving from routines to become broader leisure activities
- Body worship: fitness groups could become the new churches and community hubs
- Layering a narrative or play encourages a new level of competitive engagement



PERFORMANCE



Driving the trend for integrated and subtle tracking, the **AmpStrip** is a heart rate monitor that sticks to the user's skin like a band aid.



Embedded with sensors that track muscle exertion in 22 different places, **Athos** is a **wearable personal trainer** providing real-time feedback that motivates the user to improve their performance.

06: FITNESS INTELLIGENCE

- Consumers expect wearables to track in real time
- Wearables become truly integrated and connect to the internet of things
- Hardware meets software with invisible tech
- Integrated wearable technology must be led by function not gimmick if it is to ignite consumers' interest
- Such integrated wearable technology is the stepping stone to the next-level Human +

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Aiming for truly **integrated fabric sensing technology**, **Nike** has recently applied for a patent that could place the brand at the heart of soft sensing technology.



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PERFORMANCE



Nienke Hoogvliet's textiles are made from yarn derived from **cellulose extracted from Kelp seaweed** and harvested in South Africa. With similar properties to viscose, it has a naturally occurring organic aesthetic **but is entirely man-made.**



Biolace from Carole Collet is a project that explores the potential of synthetic biology for the future manufacturing of textiles. Her concept for genetically engineered strawberry plants, **produce lace from their roots** at the same time as fruit.

07: NEXT NATURE

- Inherent properties are harnessed to create new potential
- Nature and tech collide for the best of both worlds
- New naturals are harvested using advanced tech for new material offerings
- More than sustainability, this is about future-proofing material resources

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**“ WE REFUSE
TO BELIEVE
TECHNOLOGY
CAN'T ENHANCE
A FLOCK OF SHEEP ”**

Power Wool™ from Polartec is the **first natural synthetic fabric** of its kind and is leading the way for future symbiosis between synthetic and nature. A bi-component knit, it has distinct surface features to optimize wicking, breathability, odour resistance and

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PERFORMANCE



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TREND IMPACT

- Look first at function and need, not gender or age
- Emerging technologies that tap into the mind and opening up new product opportunities
- Engage with a layered experience through narrative or play to enhance activity
- Look to Human Plus as tech enhances man through a synthetic and biological blend
- Embrace the symbiosis of natural and synthetic materials to future-proof material resources and offer advanced properties



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AVERY DENNISON | RBIS
ELEVATE BRANDS
ACCELERATE PERFORMANCE

**AVERY DENNISON RBIS
IS PASSIONATE ABOUT
THE APPAREL INDUSTRY
AND OUR MISSION TO
HELP ELEVATE YOUR
BRAND AND ACCELERATE
YOUR PERFORMANCE
THROUGHOUT THE GLOBAL
RETAIL SUPPLY CHAIN.**

SUSTAINABILITY

Sustainability is rooted in our values and has long been part of our approach to business. Today, it drives us to work collaboratively across our entire value chain to address the environmental and social impacts of product packaging, labeling, retail branding and graphics materials. We are not alone in our quest to becoming more sustainable and have partnered with a number of external stakeholders, including trade and non-governmental organizations to share our knowledge and learn from others. In fact Avery Dennison were the first labels, trims and packaging supplier to join the SAC (Sustainable Apparel Coalition).

Avery Dennison™ Greenprint helps customers make informed decisions about product sustainability and their raw material selection. We combine life-cycle assessment with creative design to enhance product presentation while reducing your impact on the environment. Greenprint brings intelligence, creativity and sustainability to fashion – helping you use less while elevating your brand.

THE POWER OF BRANDING

EXTERNAL EMBELLISHMENTS ARE CRITICAL ON DENIM

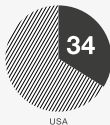


USA 32% CHINA 37% EUROPE 34%

A global study from Avery Dennison RBIS determined the relative value consumers place on the label, tag and packaging when purchasing a garment.

EXTERNAL EMBELLISHMENTS DRIVE PURCHASE INTENT ON ATHLETIC TOPS

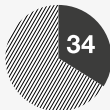
IMPORTANCE FOR ATHLETIC TOPS BY REGION (%)



USA



CHINA



EUROPE

BRANDING SOLUTIONS INCREASE PROPENSITY TO PURCHASE

PURCHASE INTENT IMPACT WITH ELEVATED BRANDING

+17%

PURCHASE INTENT BY REGION



USA

CHINA

EUROPE

BRANDING SOLUTIONS INCREASE VALUE PERCEPTION

03

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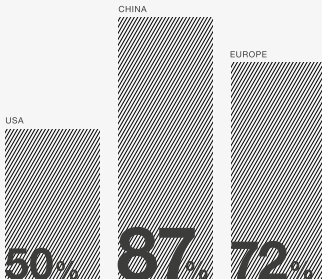
Average increase in overall garment value with elevated branding +3%

\$0.10 increase in trim cost – 400% return on \$20 garments

Embroidery effect heat transfer is universally preferred to the embroidered patch

In Europe and China, graphic tags should fold. This is of lesser importance in USA

SUSTAINABILITY MATTERS AND ATTITUDES ARE SHIFTING



Consumers across the globe are most interested in buying garments made in a socially responsible way

“Consumers care about products that improve the well-being of peoples lives”

THE THREE KEY TAKEAWAYS

1

Maximize consumer impact by elevating on-garment branding

2

Optimize conversion by increasing purchase intent 17%

3

How it's made is most important to consumers – communicate to your consumer what matters most to them

It's not just the material, it's the way it's made that is important

THE IMPORTANCE OF SHIFT

83%

Customers more likely to buy products from brands that go green

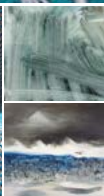
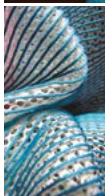
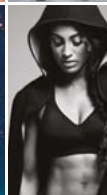
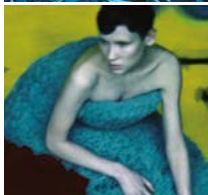
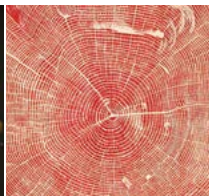
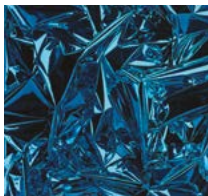
CONSUMERS EXPECT IT

88%

Consumers expect brands to take measures to be environmentally friendly

78%

Believe they can change how a company behaves based on their purchase decisions, compared with 66% of all consumers



04
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01/ 01

PERFORMANCE OUTDOOR

The continued growth and popularity of the outdoor sports market comes from the desire to explore unknown terrain, connect with the earth, lessen your stress load and gain the feeling of well-being and empowerment as you become part of the beautiful rugged outdoor world.

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KEY POINTS

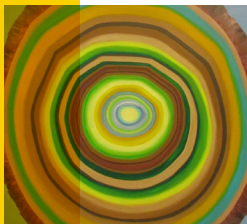
Authentic heritage influences
Outdoor sense
Rugged yet refined with technology

- Weathered
- Marbled effects
- Cracked and raw
- Wood
- Translucent layers
- Stacked strata formations
- Pearly metallics
- Sheen
- Coatings
- Silicone
- Waterproofing



01/
01

PERFORMANCE
OUTDOOR



MATERIALS & BRANDING

- Natural Looks
- Sustainable yarns & paper
- Cracked and raw
- Wood
- Translucent layers
- Stamped Branding
- Natural inks

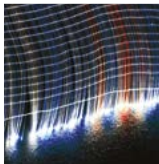
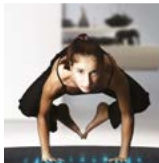
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01/ 02

PERFORMANCE CORE

Not all performance products are truly smart, but with the growing demand for smart technology that is simple and useful for athletes, we focus our attention on the ongoing push of technology and features in performance apparel and gear to monitor and assist us in getting the optimal workout every time.

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KEY POINTS

Smart engineering
Improve performance and wellness
Progressive pace of technical advancement

- Gloss and matte contrast
- Stretch
- Mesh
- Laser cuts
- Glow-in-the-dark
- Reflective
- Reactive properties
- Lightweight
- Seamless bonding



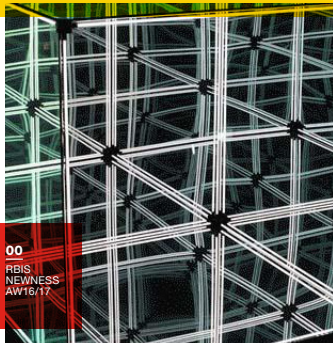
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PERFORMANCE
CORE

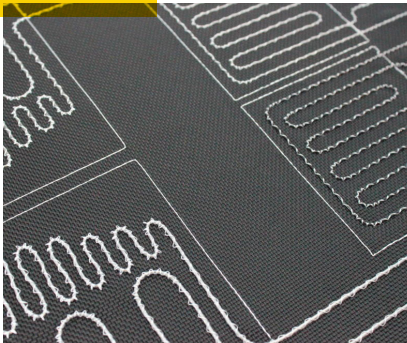


MATERIALS & BRANDING

- Intelligent Branding
- Conductive Elements
- Perforated Labels
- Stretch & Breathable HTLs
- 3 Colour Reflective
- Micro Embossed
- Textured Branding



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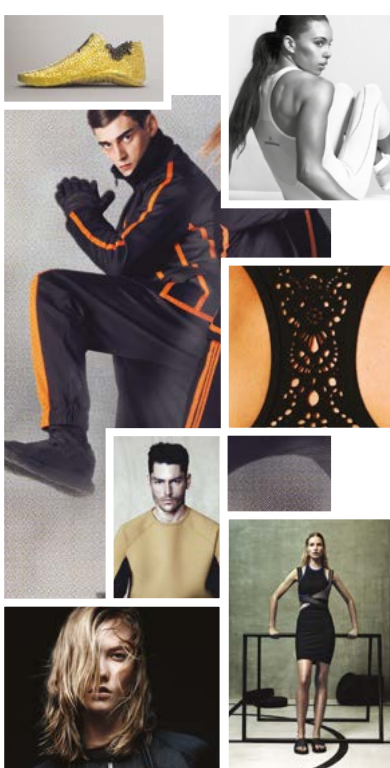


01/ 03

PERFORMANCE FUTURE FUNCTION

Merging fitness and fashion has seen a large growth based on consumers wanting to look stylish in and out of their workout sessions, including those who are participating in today's popular group / community workouts as well as those who just want to feel comfortable and look good.

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KEY POINTS

Style and performance
Unexpected sophistication
Modern and minimalistic

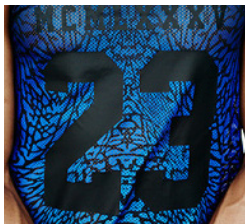
- Heat embossed
- 3D structure
- Recycled
- Metallic shimmers
- Stretch
- Neoprene
- Bonded fleeces
- Quilted
- PU coatings

01/
03

PERFORMANCE
FUTURE FUNCTION



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MATERIALS & BRANDING

- Embossed Logos
- Heat bonded elements
- Fashion tech fusion
- Metallic shimmers
- Stretch
- Structured Neoprene
- Bonded fleeces
- Quilted
- Laser Perforated Labels

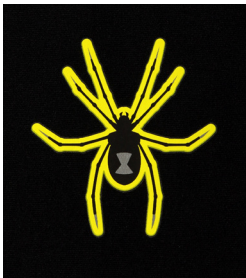


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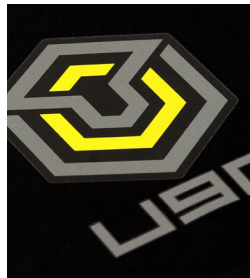
PERFORMANCE
BRANDING SOLUTIONS



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ADW7PBP2



EXTERIOR EMBELLISHMENT

- Agility colored reflective heat transfer
- High visibility solution
- No sew application
- Three effects for optimum safety (Low light study)
- Good stretch and recovery

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PERFORMANCE
BRANDING SOLUTIONS

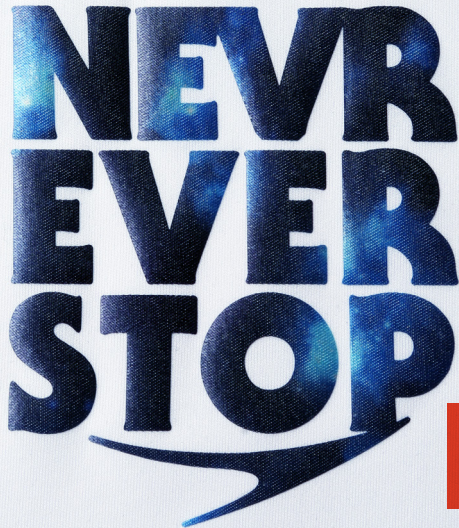
ADW7PBP7



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EXTERIOR
EMBELLISHMENT

- Fabric separated elements(FSE) dye sublimation
- Dye sublimation print on laser cut satin
- Heat seal applied, No Sew application
- Premium performance look



01/
06

PERFORMANCE
BRANDING SOLUTIONS



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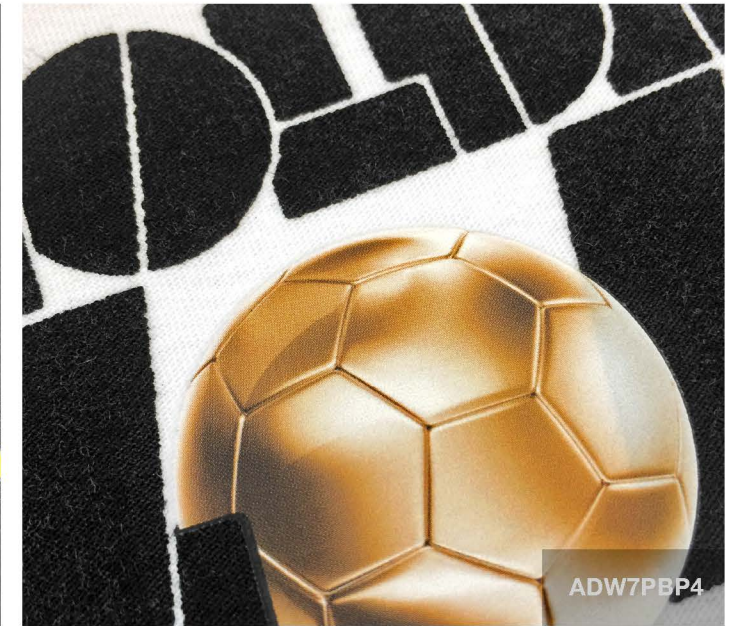
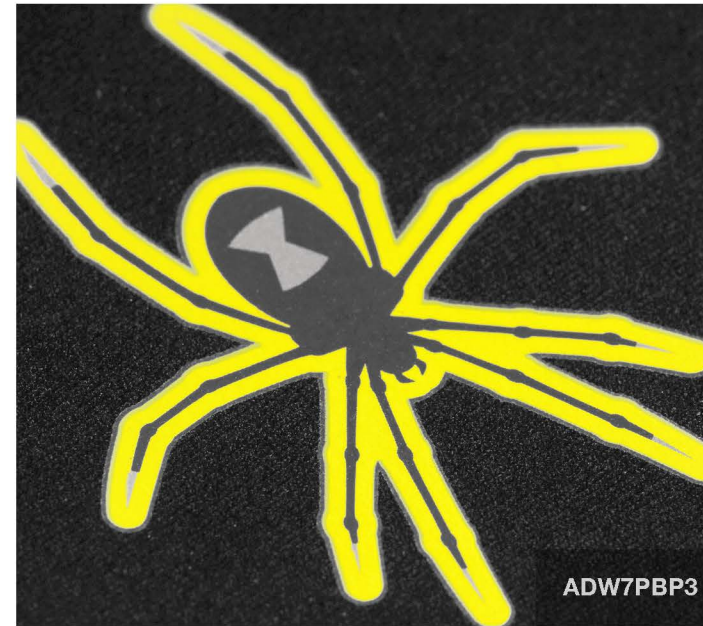
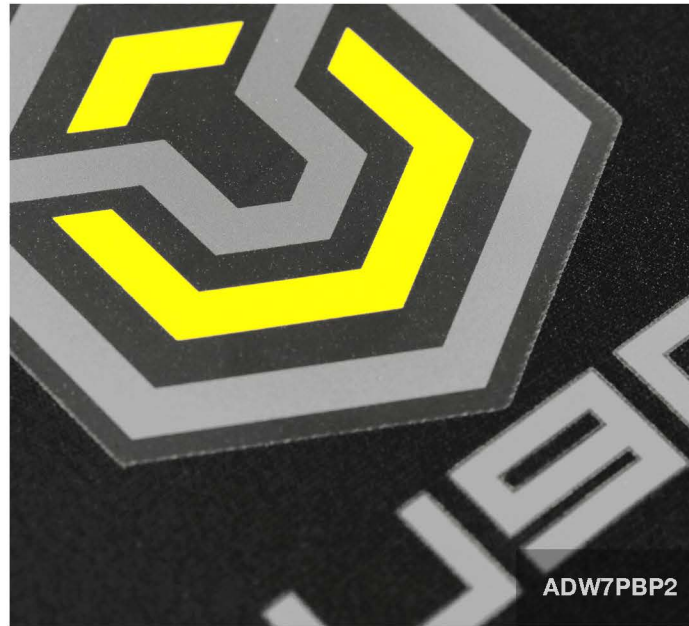
SWING TICKET

- Digital print on birch wood veneer
- Heritage aesthetic
- Natural look with high definition print
- Can include fine detail text and scan-able bar codes

ADW7POSP3



PERFORMANCE PRODUCTS



PERFORMANCE PRODUCTS





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