

Men's Fashion Week Roundup SS 23



Summary

4

Introduction

5

Fashion Capital Evolution

6

Audience Metrics

7

Platform Share

8

City by City. The Stories

13

Top 10 Brands

15

Case Study: AMI Paris

18

Top 10 Influencers

20

Case Study: Lisa

21

Key Trends: Influencers

25

Key Trends: Brand Strategy

32

Top 50 Brands

33

Terminology

34

Methodology

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London

Young designers take centre stage.

Paris

- Maintains it's capital status.
- Huge celebrity and KOL presence.

Milan

Prada reigns supreme, while exciting collaborations cause buzz.

Pitti Uomo

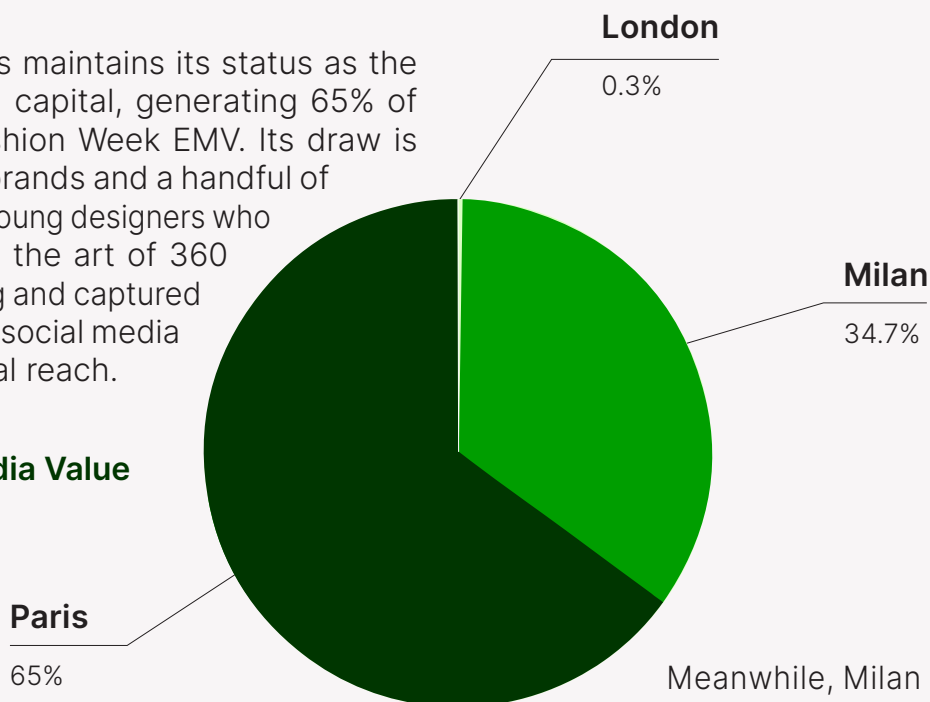
This legendary tradeshow maintains its allure.

Introduction

After seasons of Covid-related rescheduling, S/S23 saw Men's Fashion Week finally resume business as usual. Although smaller than the Womenswear edition, the Menswear circuit remains a big draw for industry professionals, celebrities and influencers and a popular pit-stop for a fashion-hit pre-September.

City-wise, Paris maintains its status as the world's fashion capital, generating 65% of the overall Fashion Week EMV. Its draw is in its heritage brands and a handful of socially-savvy young designers who have mastered the art of 360 event marketing and captured the zeitgeist of social media and its potential reach.

Estimated Media Value (EMV)



Meanwhile, Milan remains firmly on the menu for its classics, with **Prada**, **Gucci** and **Fendi** making an impact on a significant scale. London's appeal remains on young designers; less influential attendees mixed with designers shifting their shows to more prominent cities deemed the event almost missable for S/S23 had it not been for keen press interest. As a result, the small-scale event garnered just 0.3% of Fashion Month's overall media value.

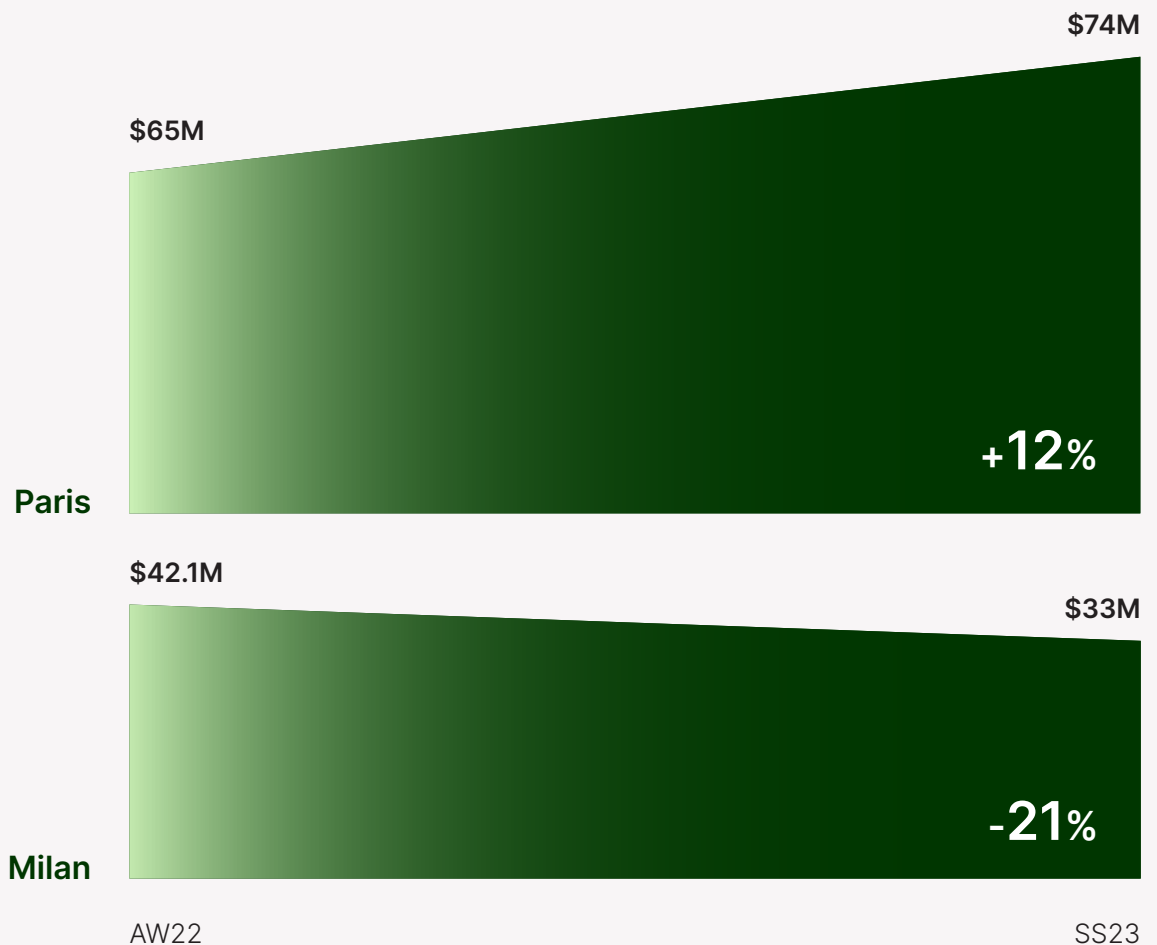
Throughout this report, Lefty team up with Karla Otto, combining data intelligence with industry know-how, for a report that uncovers the data behind the scale and statistics of Men's Fashion Week.

Fashion Capital Evolution - by EMV

Paris was the only city to see an increase in EMV this season, primarily due to more influential talents driving higher EMV, despite fewer overall posts, talents and engagement. In addition, Paris's EMV was increased by one single influencer, who we'll uncover throughout this report.

Milan's metrics in terms of the number of posts and engagement remain stable this season; however, their overall EMV decreased due to missing talents who were vital in driving media value at last season's shows.

Influencer casting continues to play a significant role in fashion weeks, with a trend towards fewer influencers, but with mega-tier followings alongside highly engaged Gen-Z followers.



Audience Metrics

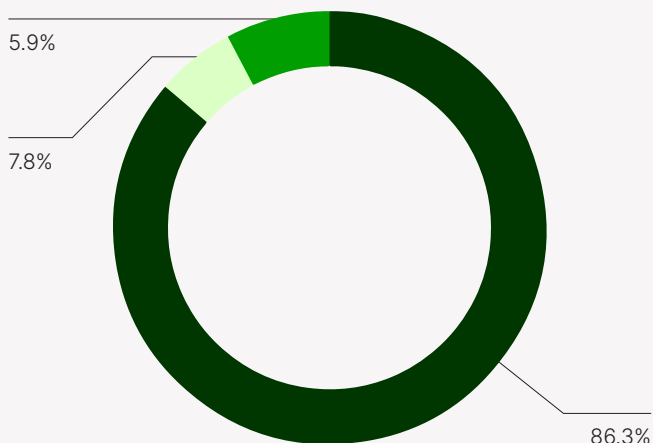
There's been much debate around the impact of the influencer versus the power of the press. Media personnel has been a constant throughout fashion history, integral to the business of fashion. In contrast, influencers are a relatively new sensation -yet a crucial component to a successful modern marketing campaign. Because of influencers' reach and engagement amongst their audiences, even just one post can generate enormous media engagement for a brand. Influencers tend to post less with broader reach, whereas the press works harder for brands overall, generating over half of the posts this fashion week (53.8%). Fashion press are, as such, still integral to the overall picture. Celebrities (defined here as actors, singers or athletes) remain a constant source of media engagement for brands, their reach similar or more to that of 'content creators.' This season saw a definitive trend towards musicians seated at luxury brand events driving EMV overall.



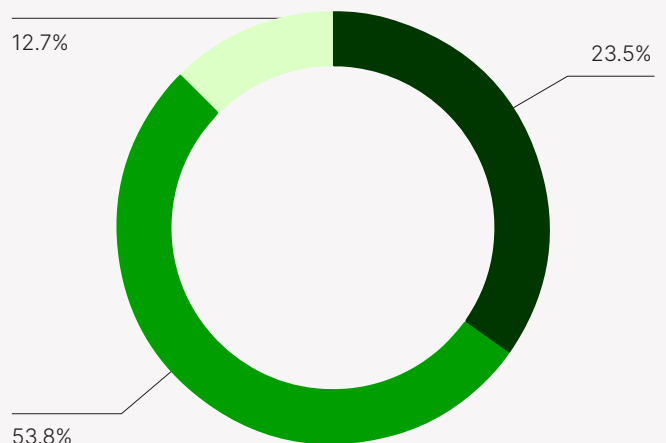
Picture via **Louis Vuitton**.

EMV

■ Influencers
 ■ Press
 ■ Celebrity



Number of Posts

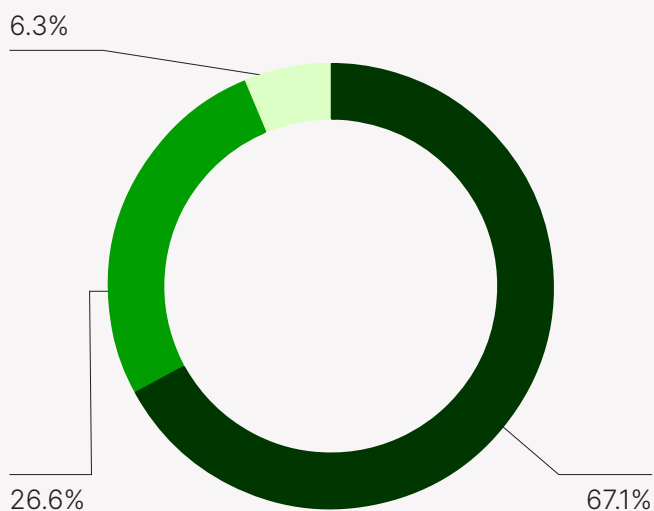


Platform Share

Whereas a new social media platform seems to emerge each month, fashion week's most dominant platform remains Instagram, with 67% of posts arising from this tool. There's been much discussion about TikTok; however, due to the platform's logistics requiring users to jump on a platform-generated trend to garner reach, the quick-fire pace of Fashion season plays into better hands of Instagram. Weibo, China's most established social network, accounted for 26.6% of S/S23 posts. Despite lockdowns, the amount of buzz generated by celebrities on Weibo is significant. It's usage throughout fashion season reflects China's dominance of the APAC market, where the top luxury houses like **Louis Vuitton**, **Prada**, and **Dior** have the largest market share. As a platform, Weibo has amassed the largest KOL presence in China, and plays well into Fashion Weeks thanks to its simulcast feature. With China on track to becoming the world's leading luxury market by 2025, Weibo is an essential part of the social platform mix.

Platforms

■ Instagram ■ Weibo ■ TikTok



Via **Versace**.

City by City

THE STORIES

City by City - The Stories

London

After a two-year hiatus, London Fashion Week returned with a tightly edited menswear line-up, described as a 'blink, and you'll miss it event' by the press. Having lost most of its big names from schedule to Paris and Milan (such as **JW Anderson**, **Grace Wales Bonner**, **Mowalola** and **Bianca Saunders**) the event presented an opportunity for press and guests to get to know London's biggest up and coming names such as **Robyn Lynch**, **Labrum London** and **Ahluwalia**.

The hottest ticket in town was **Martine Rose**, whose name is rumored to be in the ring for the next creative director at Louis Vuitton. Her collection featured BDSM-inspired accessories, boxy tailoring, and footwear in collaboration with Nike.

London remains a city brimming with innovation; however, its fleeing key names and flailing

London's hopes are firmly pinned on 'new and next' names.

press numbers have started to put a question mark over the event's impact on the fashion week calendar. Attendance will undoubtedly be higher during London Women's; however, its hopes are firmly pinned on 'new and next' names, which can be a risk for buyers in a challenging economic environment, and less of a draw for influencers as a whole.

For scale, London generated **\$343K** of EMV, just **0.3%** of the overall EMV from the menswear season.

1. Via Fabuk Mag. 2. Via Dazed Digital. 3. Via Door11. 4. Via 10 Mag. 5. Via Hypebae.

LFW Top 5 Brands (EMV)

1. **Justin Cassin**
\$116,000



2. **Ahluwalia**
\$101,000



3. **AGR**
\$61,400



4. **Robyn Lynch**
\$23,100



5. **Yuzefi**
\$18,000



City by City - The Stories

Pitti Uomo

Although not an official city on the Fashion Week schedule, Pitti Uomo remains a firm favourite for industry professionals, nestled between London and Milan fashion weeks. This season's guest runway hosted London's **Grace Wales Bonner**, who relocated her show from London to Pitti. Elsewhere, **Soulland's** runway show alongside **Li Ning** also drew crowds.

Pitti Uomo remains a firm favourite destination for industry professionals throughout the season.

An exhibition featuring 40 hand-picked looks by **Ann Demeulemeester** took place in Florence's Stazione Leopolda for 24 Hours, showcasing the designer's unconventional material play and iconic silhouettes, drawing brand devotees to the exhibition.



Pictures via Wales Bonner. In the two following pages, all pictures are taken from brand's webs, except for Gucci's one (via L'Officiel Belgique) and Celine's one (via TagWalk).

City by City - The Stories

Milan

With Covid restrictions eased, Milan Men's returned in full force, with 63 shows, presentations and digital activations showcasing the best of Italian luxury fashion.

As a market, the Italian fashion sector was hard hit by the pandemic; however, projections by Camera Della Moda expect sales in 2022 to reach 92 billion euros, up 10.5 percent versus 2021 and 2.1 percent versus 2019, marking a full recovery to pre-pandemic levels.

Amongst the schedule, marquee names from **Fendi**, **Prada** and **Dolce and Gabbana** drew in the crowds and a sea of industry guests both in and outside the venues, while London's **JW Anderson** was welcomed to the schedule, leveraging the power of Milan's global stage to its fullest extent.

A clever 360 event strategy placed Prada as the highest ranking brand.

The season marked a welcome return to the men's runways for designers such as **Versace**, while **Moschino's** Jeremy Scott presented his first all-men's runway for the house. Meanwhile, a final bow from Kean Etro of **Etro**, handing over the reins and future of his namesake house to Marco De Vincenzo.

Milan proved the circuit's second-highest-ranking city, generating 35% of the season's overall EMV at **\$40M**. **Prada** was the leading brand, generating the majority share of \$25.3 M EMV with their 360 show strategy.

MFW Top 5 Brands (EMV)

1. **Prada**
\$25.3M



2. **Dolce & Gabbana**
\$2.17M



3. **Fendi**
\$1,68M



4. **Gucci**
\$685K



5. **DSquared2**
\$368K



City by City - The Stories

Paris

The final stop on the menswear circuit, Paris Fashion Week played host to some of the world's leading names in luxury. Not only does it draw in the very top fashion professionals, but swarms of fans, desperate to catch a glimpse of the personalities attending the shows. Such is its impact; Paris generated **\$75M** in EMV - **65%** symbols of the overall EMV from the entire menswear season.

S/S23 was all about the spectacle. Extravagant sets included **Louis Vuitton's** giant race-track, **Dior's** quaint countryside cottage and a live rodeo at **Casablanca**. King of the destination show, **Jacquemus**, transported guests to the scenic salt mountains of Arles, while **AMI** captured the essence of Parisian style with a show that overlooked the roof-tops of Paris from Sacré-Coeur.

K-Pop stars dominated the influencer share of voice in Paris.

Inside the shows were a flurry of celebrities and influencers, including live performances from Kendrick Lamar, while guest lists welcomed everyone from Victoria Beckham and Naomi Campbell to Justin Timberlake and Jessica Biel.

A casting trend also cited in Milan; KPop stars continued to generate hype. On the final day, **Celine** sent the city into meltdown due to an appearance from their brand ambassador, Lisa of BlackPink.

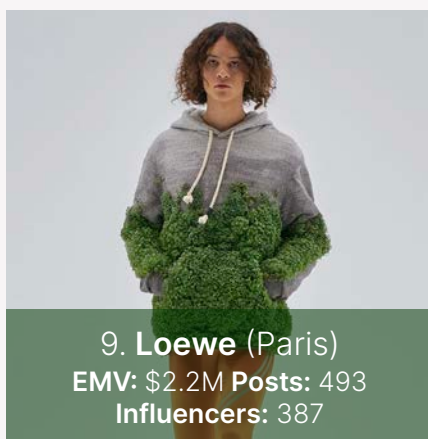
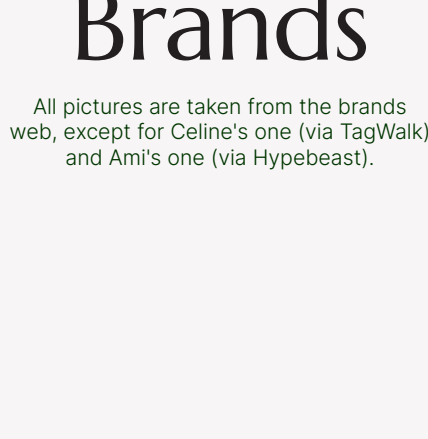
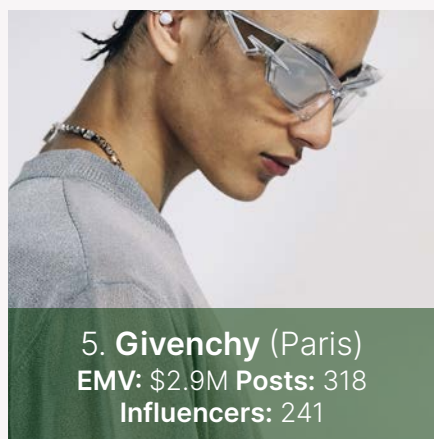
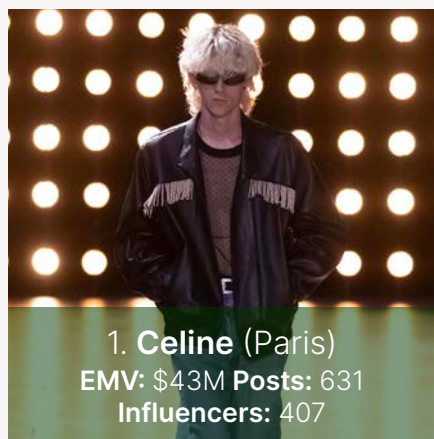
PFW Top 5 Brands (EMV)

1. Celine	2. Louis Vuitton	3. Dior	4. Ami	5. Jacquemus
\$43,161,038	\$7,608,432	\$6,560,000	\$5,376,608	\$2,654,000



TOP 10

Brands



EMV ranking TOP 10 Brands

All pictures are taken from the brands web, except for Celine's one (via TagWalk) and Ami's one (via Hypebeast).

Case Study



One of the youngest brands to make the top ten brands this season, AMI's collection presented at the Sacré-Cœur captured an impressive EMV of \$5.4M. Karla Otto x Lefty takes a deep dive into what made their show a triumph.

Pre Show Phasing

- The brand adopted a 'phasing first' strategy across its social media outlets, utilising a cross-sector of relevant talents regionally and across their key sales markets in pre-show social teasers. This helped build momentum, creating a longer lifespan of EMV overall.
- Showgoers received invitations with bespoke caricatures, tapping into the trend for personalised, social-media-friendly invitations.

Influencer Casting

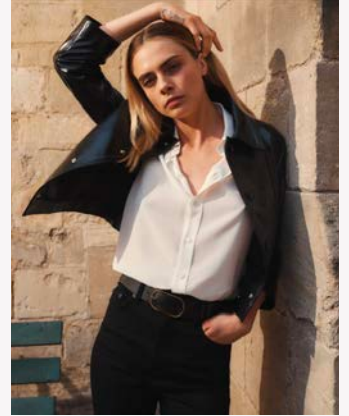
- AMI tapped into pockets of cross-demographic pop culture, inviting Netflix stars

from Bridgerton, Euphoria, Young Royals and Heartstoppers. Elsewhere, TikTok sensations such as Noah Beck drew in crowds alongside famous faces such as Tom Daley, Naomi Campbell, and local-heroes Carla Bruni and Caroline de Maigret.

- The runway had a line-up of famous faces, adding an element of surprise that drove media moments. Movement director Stephen Galloway choreographed the show, paying particular attention to Cara Delevigne's walk that garnered press attention - everything was intentional.

The Show

The show marked a historic moment in fashion: the first ever runway at the Sacré-Cœur. Moreover, the runway snaked around a backdrop of Paris, garnering instant media attention and opportunity for social moments for its 500 guests. Trend-setting editorials; Dazed, i-D and Another magazine all live-streamed the show, whereby 35 of 54 looks were womenswear, appealing across markets.



Pictures are taken from AMI's web, Instagram or Youtube channel, except for Angus Cloud's one (bottom left corner). The invitation (top left corner) is courtesy of the brand.

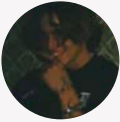

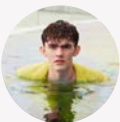

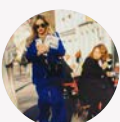


Conclusion

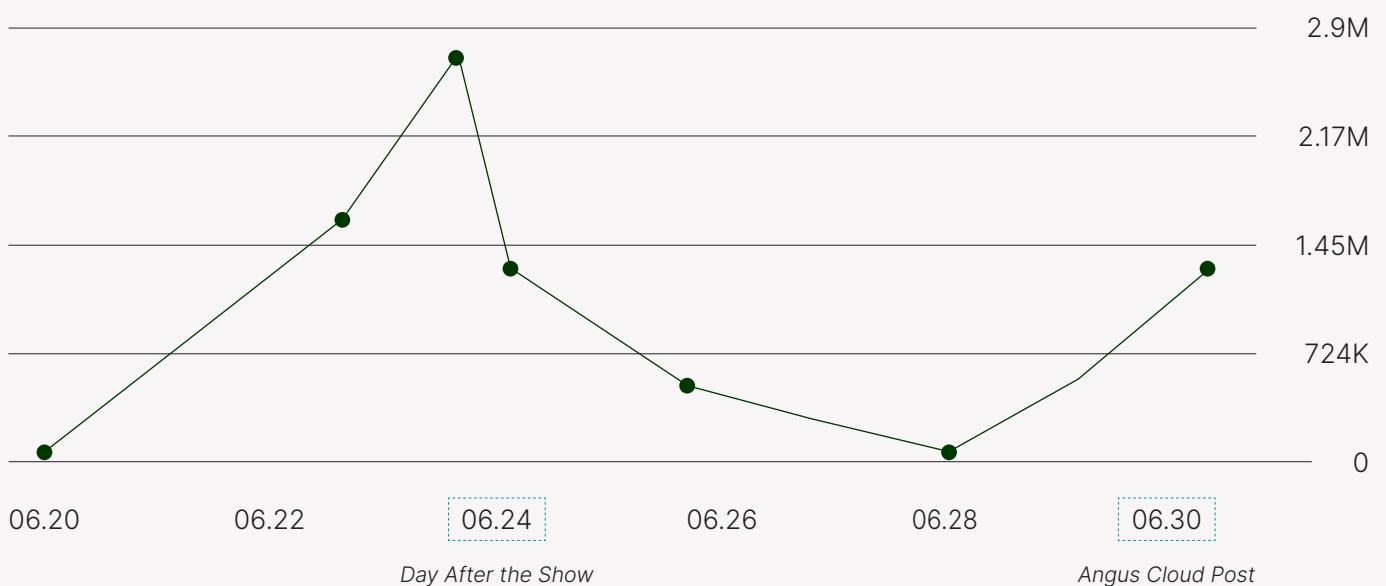
For a brand just 11 years old, AMI's EMV rating is impressive, nestled amongst heritage brands with much larger followings. AMI captured

the sweet spot between location, casting, audience and pre-and post-show initiatives that made for an iconic media moment.

AMI's Top Influencers

Who?		EMV (in \$)	Followers	Posts	Engagement (in %)
	@vinniehacker	1.26	5.78M	1	21.8
	@voguemagazine	950K	39.4M	1	1.77
	@joelocke03	652K	3.12M	1	21.01
	@noahbeck	536K	9.15M	2	2.94
	@adelle.fr	489K	73.9K	3	61.18

EMV Evolution per Day (in \$)



TOP 10

Influencers

TOP 10 Influencers

EMV: \$13.4M EP

8
@twicetagram EMV: \$2.5M Engagement: 9.3% Pragma

@winmetawin EMV: \$5.6M Engagement: 9.3% Prada

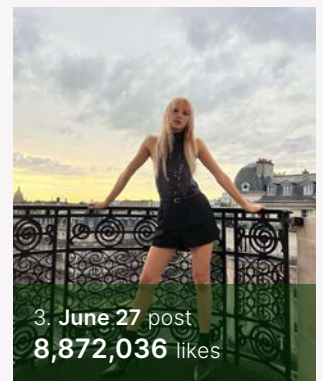
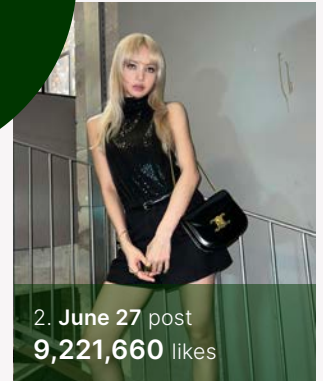
@soohsehun EMV: \$3.1M Engagement: 6.8% Dior

@_Jeongjaehyun EMV: \$2.93M Engagement: 24.5% Prada

@lalalisa_m EMV: \$29.5M Engagement: 11.9% Celine

Louis Vuitton, Givenchy

#1 Influencer: Case Study



None of the influencers at menswear S/S 23 shows were more impactful than Lisa from the Kpop group, BLACKPINK. Lisa's attendance at the Celine menswear show in Paris caused pandemonium throughout the city. The New York Times reported, "Untold thousands of fans had spent the night along the Seine outside the Trocadero and waited for a glimpse of Thai rapper and singer Lisa of Blackpink. Tsunamis of adulatory screams greeted the performer." The extensiveness of Lisa's reach is proven through the EMV generated for her three Instagram posts tagging Celine – accounting for 39% of all EMV accrued among men's fashion weeks.

In 2020, Lisa was appointed the first ambassador to Celine under Hedi Slimane, with Lisa often being referred to as the creative director's 'muse.' Creative direction aside, Lisa's position as ambassador is not

Lisa generated 39% of the EMV across S/S23.

only strategic for Celine's global reach but also an extension of what K-pop idols are known for – loyal fans with undying support. As the most-followed-on Instagram K-Pop idol, Lisa's influence reaches far. At one of Lisa's first events with Celine, she made an appearance at the Men's S/S 22 show in Paris. Fashion-technology company, Lyst reported that "global searches for Celine's Triomphe bag leapt 66% on June 28, 2019, after [Lisa] published an image of the style on her social media." This strategic move by Celine increased brand awareness and resulted in a surge in sales. Given K-Pop idols' formidable influence and vast reach, it is no wonder that more and more luxury brands are looking to collaborate with them.

Influencers

4 KEY TRENDS

1. THE POWER OF K-POP

While K-Pop has been around for decades, it only recently broke into the global music scene. Groups such as BTS and BLACKPINK have, in recent years, become international superstars. This newfound popularity has also led to increased interest from luxury fashion houses who have been quick to capitalize on the trend for K-Pop and its megastars highly engaged fan base, partnering with idols for everything from ambassadorships to limited-edition collections. Being associated with K-pop stars has helped luxury brands appear more modern and relevant, whilst garnering a new generation of fans and potential customers for commercial conversion.

Due to K-Pop idols' association with luxury brands, mass media attention for the newest designers collections has become the norm. In May 2020, the Wall Street Journal reported that "three days after Dior announced it would dress BTS on Tour, search interest in the French label jumped 420%."

Further, Katy Lubin, VP of Communications at fashion-technology platform Lyst, reported that Instagram posts of idols wearing a particular designer or piece of clothing have led to huge spikes online or items to sell out in 24-48 hours. While some may see K-Pop/luxury collaborations as a passing trend, it seems more likely to be a long-term shift in the fashion industry. K-Pop stars'

When a K-Pop star wears a garment, Lyst reports sell-out success within 24-48 hours.

power and influence over their fans and on social media are unprecedented, and brands are quickly catching on to the fact that partnering with idols is a surefire way to generate hype, excitement and ultimately, sales.

As K-Pop continues to grow in popularity worldwide, we will likely see even more idols as the future faces of fashion houses



Via @lalalalisa_m's Instagram.

Via @vinniehacker's Instagram.



2. ALL EYES ON GEN Z

According to Glossy, over 78% of Gen Z follow luxury brands on social media and are increasingly becoming the number one demographic of luxury goods consumers. The draw for Gen Z is luxury brand's focus on quality, exclusivity, and personalisation. In a world where fast fashion is commonplace, luxury brands offer a unique opportunity to invest in timeless pieces that will last a lifetime. In addition, luxury brands exude status, which resonates with this generation of digital natives who have carved out much of their identity around their social media platforms.

With this in mind, brands are increasingly casting influencers and celebrities from this demographic to resonate with their audience,

“78% of Gen Z follow luxury brands on social media.”

- Glossy

ce, create brand affiliation, and create opportunity to convert spend.

Influencers and celebrities like TikToker Vinnie Hacker and Thai actor Win Metawin garnered massive media attention for their posts about designers at this season's Men's Fashion Week. In contrast, in seasons before, TikTokers like Addison Rae and Khaby Lame have fared the same.

As a whole, this strategy has proven essential for brands to build trust and credibility with younger audiences and has also opened up a channel for more stars on social media platforms like TikTok and YouTube to become legitimate KOLs in the fashion space. The disruption these digital-native celebrities

have brought about on the traditional red carpet layout and online shows how much sway they hold in today's fashion industry. By partnering with social media sensations, brands can tap into this new market of consumers at an early age who are passionate about fashion and eager to learn about new products and trends. This shift in how luxury brands choose which talents to work with will have a lasting impact on the industry.



From left to right, from top to bottom. Audrey Tautou at AMI show (via AMI). Casting at Versace (via Versace). Kendrick Lamar performing at Louis Vuitton show (via NME).

3. CELEBRITY CASTING

Brands who cast celebrities on the runway made the Top 50 ranking S/S23 shows.

Influence doesn't end with invitees; much of this season's model casting focused on celebrities and KOL's walking the runway as a bid to generate hype and create brand affiliation.

This season's biggest success story was **AMI Paris**, who's 'love letter to Paris' collection included iconic models such as Audrey Tatou, Precious Lee, Paloma Elsesser, Karen Elson, Liya Kebede, Kristen McMenamy, Mariacarla Boscono and Cara Delevingne. **Versace**, well known for celebrity casting, opted for a new spin on the trend, casting children of legendary models such as Mark Vanderloo, Helena Christensen, Andre van Noord, Carla

Bruni, Megan Douglas and Angela Lindvall.

Elsewhere, musicians were popular to cast in performing or walking shows. At **Louis Vuitton**, Kendrick Lamar played homage to the late Virgil Abloh with a live performance, while Sonic Youth played at Prada. Likewise, hip-hop stars were a popular choice for runway casting; Lil Durk walked **Amiri**, and Koba Lad for **Casablanca**, while Joey Starr appeared at **Marine Serre** alongside famous athletes and artists such as Jorja Smith and Lourdes Leon.

Celebrity casting pays off. All of the brands mentioned above appeared within the top 50 ranking shows of the season.

4. LESS IS MORE

Throughout Covid-19, live-streaming and digital showcases created a more accessible fashion week for the general public. There was much talk about whether this would break down the exclusivity of the event, but the exact opposite happened. With pandemic-era fashion shows being accessible to the general public, media buzz was more significant than in previous seasons, begging the question of whether fashion weeks

were to remain more open to the public post-pandemic. Interestingly, what happened was the opposite.

From the digital-only Fashion Weeks of 2020 to now, a common trend is increasing EMV from season to season (which is not always commonplace). What's most surprising about these increases is that there have been decreases in the amount of KOLs and content mentioning Fashion Week shows. Instead of casting a wide net of talents as seen for digital-only shows, brands are shifting towards inviting a few high-profile celebrities and influencers to their shows to generate impressions online and give an air of exclusivity back to the brand.

The new casting trend of fashion houses partnering with KOLs has increased as IRL shows have returned. By having KOLs post about the show, brands can reach a wider audience with little effort. This trend was especially apparent at this season's Men's Fashion Week with **Celine's** collaboration with Lisa from BLACKPINK and V from BTS. While Vogue didn't receive an invite to Celine's show, these K-Pop stars' attendance and posts generated much publicity for the brand. The takeaway from this trend is that brands are now relying less on multiple sources to create impressions and are instead choosing the more efficient route of employing one or two massive stars as the faces of the brand.



Picture via ABP LIVE.

Brand Strategy

5
KEY TRENDS



1. DESTINATION SHOWS

Throughout Covid-19, fashion shows fell silent, so it makes sense that designers are returning to locations with the 'wow' factor to create plenty of media moments.

There's an obvious synergy between destination and EMV. **Jacquemus** (whose brand identity has become synonymous with beautiful show locations) makes the top ten global brands this season nestled amongst heritage powerhouses, an impressive feat for a brand just over a decade old. The same applies for **AMI Paris**, founded in 2011, whose spectacular *Sacré-Cœur* backdrop captured the Pa-

risian *je ne sais quoi*. **Zegna** offered the Milan crowd a trip to their mountain lined atelier on the final day of the the cities showdown.

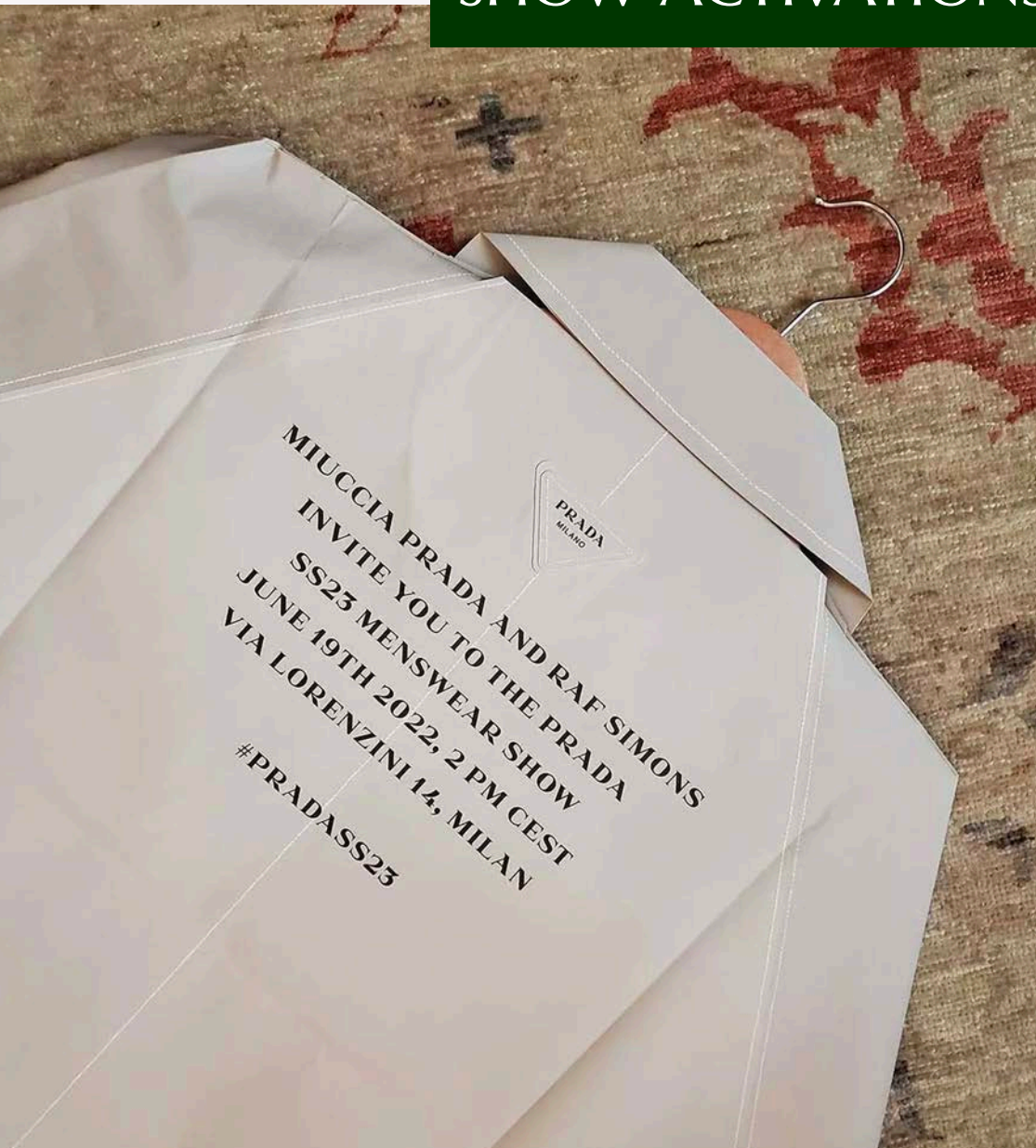
Another strategy trending amongst brands such as Jacquemus, is moving their show off-schedule, be it by a day or several weeks, to house a destination show that cuts through the noise of fashion week and dominate the fashion news cycle.

However, brands must proceed with caution. Destination shows can often face backlash, thought to be less sustainable than hosting on-schedule shows.

Destination shows cut through the noise of fashion week and dominate the news cycle.

From left to right, from top to bottom. Jacquemus show in the Camargue, France (via Harper's Bazaar). Zegna show at Lanificio Zegna wool mill (via Zegna). AMI show at Montmartre. (Via i-D).

2. PRE AND POST SHOW ACTIVATIONS



Invitation to Prada show (via Highsnobiety).

An engaging pre and post show strategy lengthened the impact of EMV for brands.

Some of this season's most successful brands had one thing in common: an engaging digital and physical pre and post-show strategy that lengthened the impact of their earned media value.

Brands are applying various marketing tools to generate hype beyond the show alone. Although they may seem like an entry-level strategy, show invitations

(which had previously fallen out of favour instead of QR codes) are back in the spotlight thanks to thoughtful innovation by brands such as **Prada**, whose show invites were comprised of actual garments; no doubt future collectibles.

Elsewhere, brands such as **Etro** thought outside the box regarding show invitations. Each show attendee received a phone call from the Etro team, who proceeded to read a poem to the listener. Enticing invitations needn't be physical.

JW Anderson teased his first outing in Milan with a series of flyers around the city that featured illustrations from the show with tear-off location strips that led a crowd outside the venue.

3. THE WHOLE WORLD'S STAGE

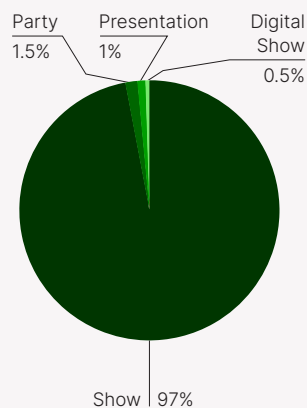
Brands go all-out on production, while parties prove the new presentation.



From left to right, from top to bottom. Lemaire presentation (via Lemaire). Issey Miyake acrobatic showdown (via Highsnobiety). Acne Studios party (via Acne Studios).



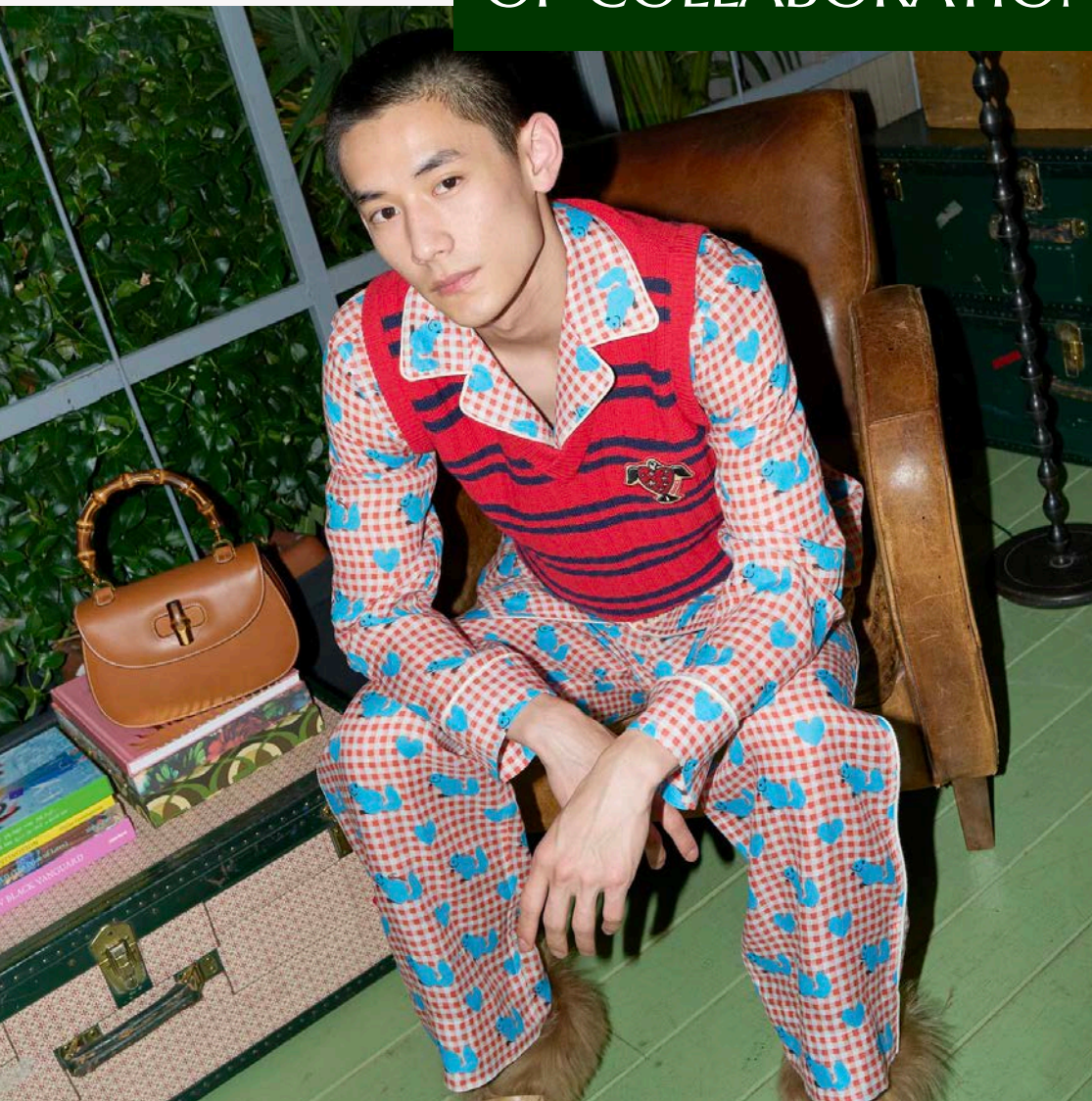
Throughout the pandemic, as brands were forced to switch to digital shows and presentations, many brands vowed never to switch back for the sake of their financials and the benefit on their sustainability credentials. S/S23 saw that the very opposite was true. Brands went all out on production value, with over 97% of the shows in a runway format.



In Paris, guests immersed themselves in the daily routines of the models at **Lemaire**, saw a acrobatic showdown at **Issey Miyake**, and a real life rodeo at **Casablanca**. **A Cold Wall** highlighted its collection with a two day immersive installation, while **Doublet** showed guests in snow in a theatrical runway performance.

Parties proved the new presentations. **Acne Studios'** strategy to host a party at its new store in Rue Saint-Honoré proved a standout success, creating a buzz with an influential guest list that drove their EMV by +160% compared to AW22 throughout the fashion week. Meanwhile, **Supreme** leveraged the captive audience of Paris fashion week.

4. THE POWER OF COLLABORATION



Designers continue to capitalize on the power of collaboration.

Above, Gucci 'HA HA HA' collaboration (via Gucci).

Designers continue to capitalize on the power of collaborations, doubling down on collective EMV and pushing forward design innovation.

Milan presented audiences with perhaps the most talked-about collaboration between **Gucci** and pop star Harry Styles. The duos' friendship is captured in "a collection born from a creative relationship that self-generates from amusement and ends with the tangibility of product." Named 'HA HA HA' (the initials of both the designers and the stars' forenames), the collection features vintage-inspired silhouettes, playful motifs and extravagant silhouettes that 'redefine the image of the gentleman.' Despite not showing a physical runway, the presentation generated \$685k in EMV.

Elsewhere, **Jacquemus** leveraged their destination runway show to launch their long-anticipated collection with **Nike**, capitalizing on the moment of fashion week to elongate the brand's buzz, generating \$2.7M EMV.

It's not all big names driving collaborations. **Loewe's** collaboration with sustainable materials designer **Paula Ulargui Escalona** resulted in bio-based materials innovation; plants were grown across garments and shoes in a runway that set forth to comment on garments becoming at one with nature.

5. GENDER 2.0

S/S23 saw the dialogue between men's and women's apparel continue to blur, both in terms of the number of co-ed runways and gender-neutral clothing becoming all the more commonplace across fashion weeks.

Self expression, identity and sexuality were key themes. The skin-baring aesthetic we've seen on the women's runways came into force menswear, with bare torsos and underwear as outerwear spotted everywhere from **Rick Owens**¹, **Marine Serre**², **Givenchy**³, **ALYX**⁴ and **Thom Browne**⁵. Such was its prevalence; Tagwalk recorded a 504% YOY increase of 'unveiled bodies' on the runway.

This overarching trend plays into a broader societal dialogue around gender and identity. One could see the shift happening in the show attendees' wardrobes on the streets outside the shows. Gender 'norms' are an outdated construct in fashion circles. With S/S23 falling alongside Pride month across Europe, the event felt like the perfect moment to encapsulate societal shifts around gender identity and fashion in one place.



















































Pictures are taken from the brands webs.



EMV Ranking

TOP 50 Global Brands



1. Celine		26. Emporio Armani	
2. Prada		27. Isabel Marant	
3. Louis Vuitton		28. Tod's	
4. Dior		29. Etro	
5. Ami		30. Casablanca	
6. Givenchy		31. Dries Van Noten	
7. Jacquemus		32. Kidsuper	
8. Kenzo		33. Giorgio Armani	
9. Loewe		34. MSGM	
10. Dolce & Gabbana		35. John Elliot	
11. Fendi		36. Moschino	
12. Acne Studios		37. Justin Cassin	
13. Hermès		38. 1017 ALYX 95M	
14. Rick Owens		39. Lemaire	
15. Gucci		40. Ahluwalia	
16. Marine Serre		41. Comme Des Garçons	
17. Amiri		42. Kolor	
18. DSquared2		43. Egonlab	
19. Y/Project		44. Études	
20. Blumarine		45. Wales Bonner	
21. Paul Smith		46. AGR	
22. JW Anderson		47. Craig Green	
23. Versace		48. Walter Van Beirendonck	
24. Yohji Yamamoto		49. Courrèges	
25. LGN Louis-Gabriel Nouchi		50. Marcelo Burlon	

Terminology



Picture via **Lemaire**.

EMV

Earned Media Value or “EMV” transforms the value created by influencers and publications and gives an estimation of the price of an equivalent paid media campaign on social networks.

$$EMV = \frac{\text{Impressions}^1}{1000 * CPM}$$

***Impressions:** number of times a content is displayed.

Engagement

Engagement rate is a metric used to gauge how involved an influencer's followers are with the content that they post. The higher the post engagement rate, the more engaged followers are with the content that is being posted – with over 2 or 3% engagement considered highly engaged.

$$\text{Engagement Rate} = \frac{\text{Number of Engagements}}{\text{Number of Followers}}$$

MAU

Monthly Active Users or “MAU” refers to the number of unique users who have visited a social media platform within the past month's time.

Methodology

This study is based on the analysis of around 4000 influencers with more than 10,000 followers on Instagram who have mentioned one of the participating fashion brands during the fashion week season s/s 2023. The influencers presented in this study have been identified thanks to Lefty's proprietary algorithms.

The EMV is calculated by estimating the number of impressions of each publication and associating a CPM of \$100, which is equivalent to \$1 per engagement. The formula used is:

$$\frac{\text{Impressions} * \text{CPM}}{1000}$$

Note: Even though the list of influencers retrieved aims to be exhaustive, it is possible that some influencers who have posted looks for brands may not be taken into account in the present study.

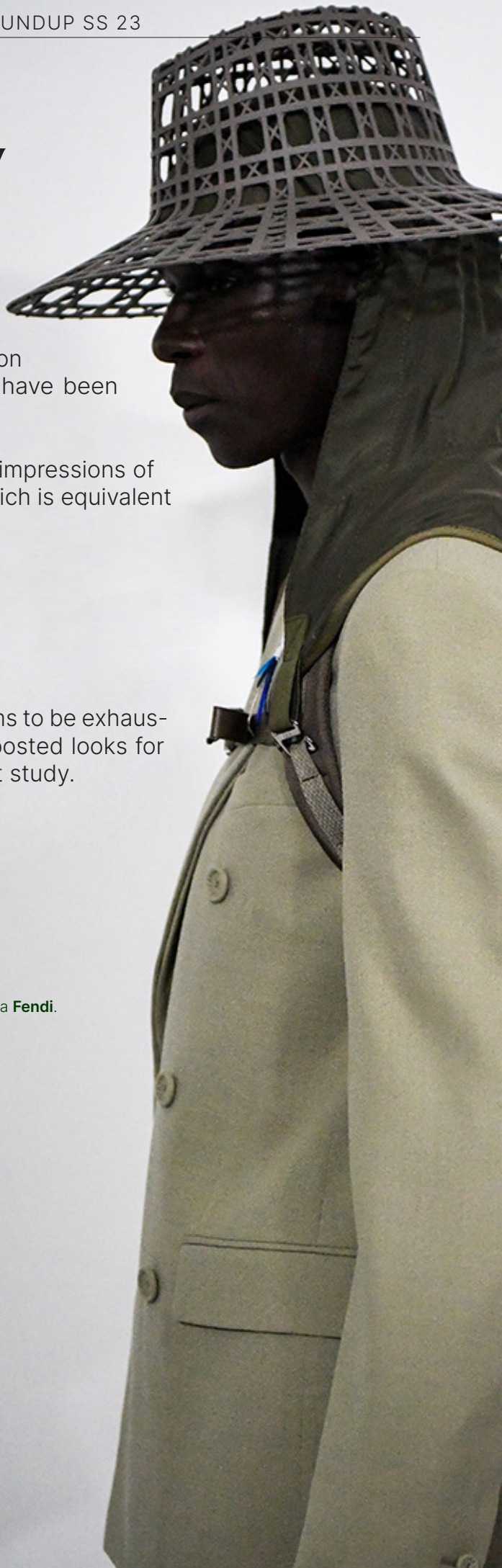
Picture via **Fendi**.

LFW S/S 23: 11th to 13th June 2022.
Report Tracking Date: 9th to 14th June 2022.

Pitti Uomo S/S 23: 14th to 17th June 2022. Report Tracking
Data: 13th to 18th June 2022.

MFW S/S 23: 17th to 21st June 2022.
Report Tracking Date: 16th to 23th June 2022.

PFW S/S 23: 21st to 26th June 2022.
Report Tracking Date: 20h to 27th June 2022.





Lefty was created in 2015, Lefty is a platform that helps brands optimise their influence marketing programs. Based on proprietary, state-of-the-art technology, Lefty supports brands with influencer identification, management and reporting of their influencer marketing campaigns. Discover more at lefty.io

Karla Otto was Founded in 1982, Karla Otto is a full-service brand-building agency, operating from thirteen cities across the globe. Karla Otto's service is unparalleled. Built on the founder's pioneering spirit, discerning eye and intuition, our global team is dedicated to delivering work that expertly combines detail and local precision with large-scale impact. Blending the best of fashion, beauty, design, lifestyle, and arts & culture, we offer a panoramic view of opportunities and the ability to execute complex ideas. Our loyal network and unrivalled approach to culture and community enables us to take brands to brave new territories. Discover more at karlaotto.com