

Need to Know

Catwalk Need-to-Know Pre-Fall 21

Topweights and above-the-keyboard details dominate collections, as designers consider new casualised consumer dress codes

Polly Walters
01.15.21 · 8 minutes



Nanushka

Data overview

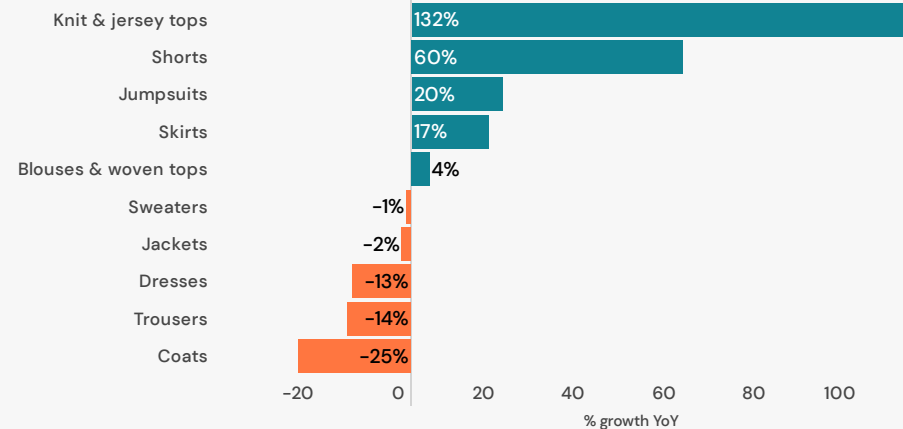
The effects of the current pandemic remained clear, with designers focusing on casual transseasonality and wearable pieces driven by comfortable design.

As expected and in line with #abovethekeyboardressing, topweights continued to dominate, led by the knit and jersey categories. Designers took note of the new casualised dress codes, turning their attention to lifestyle-driven pieces such as the #legging and #cardigan, meaning knits more than doubled (+132%) to hold 7% of the apparel share.

Unsurprisingly, in comparison dresses (-13%) and trousers (-14%) declined to hold 19% and 13% of the share, respectively.

Considering the new cautious consumer, a greater focus was given to updating styles via print, growing to represent 33% of the assortment (up from 25% YoY). Designers stuck to fail-safe familiars, with leopard print reigning supreme, increasing 171% YoY, with its largest uptick noted across outerwear.

Dresses drop as knit & jersey tops reach an all-time h



WGSN catwalk data. Pre-Fall 21 vs Pre-Fall 20



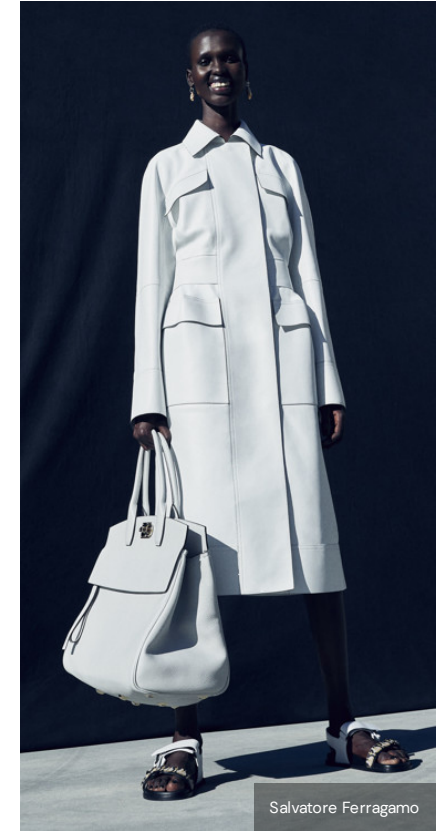
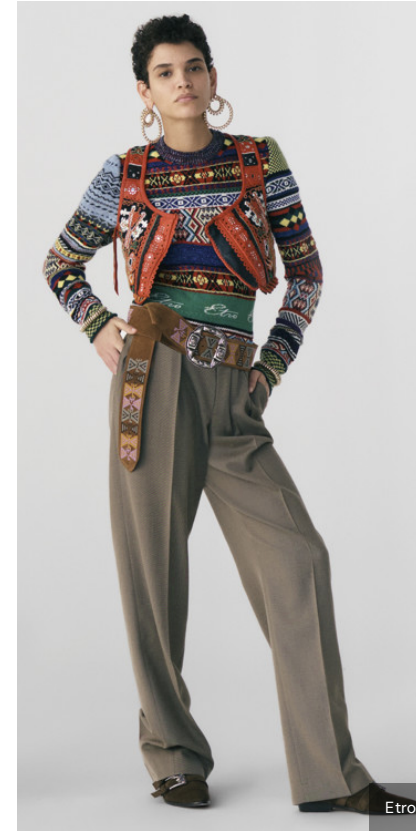
Top trends Pre-Fall 2021, WGSN Fashion Feed

#Matchingset
#Everdaydecadance
#Workleisure
#Abovethekeyboardressing
#Partywear
#Statement*
#Functionalfuture
#Polkadadot
#Twomilewear
#Moderngoth
#Florals*

Top hashtags used by WGSN strategists in posts associated with #prefall21: January 5-13 2020

Trends

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#everydaydecadence

With an increased amount of time spent at home, designers tap into the consumer desire to dress up as an act of escapism. Explore over-the-top embellishments, decadent materials and fanciful accessories.

#workleisure

Moving on the #stayhomestyle aesthetic of the past year, this story centres on re-translating leisurewear with workwear accents. Think luxe lounge sets, oversized shirting and a leggings-with-everything frame of mind.

#moderngoth

Echoing our unsettling A/W 21/22 Phantasmagoria theme, dark and brooding looks drive this story. Form the foundation with an all-black palette and use premium leathers and tough embellishments to elevate finishes.

#eclecticfolklore

Rooted in the time-honoured tradition of craft, this trend focuses on bold pattern mixing. Designers explore elements of kilim and tapestry patterns alongside Nordic, Estonian and Eastern European influences.

#functionalfuture

Following S/S 21, designers continue to consider what returning to the office may look like in a post-pandemic future. Sports-inspired fits and technical fabrications sit at the heart of this story, with comfort remaining a key driver.

Colour

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#truffle

The timeless appeal of brown endures, with warm shades of truffle proving popular across collections. Take note and add it into colour palettes, as nostalgic browns are set to continue for future seasons.

#butter

Butter, the breakthrough colour of S/S 21, continues to gain momentum. Calm and warming, this softer iteration of yellow feels easier to wear than many. Take note, as we're backing this shade into 2022 and beyond.

#daylightblue

Clean and refreshing, daylight blue's popularity lies in its links to wellness and hygiene. Following on from S/S 21, this shade is a perfect accompaniment to our #functionalfuture trend.

#offwhite

Subtle shades of off-white are enhanced via texture and lustre, upgrading this colourway with a fresh and contemporary narrative. Take note of brands such as Jil Sander and explore applying it head-to-toe.

#sweetpink

Designers shift away from desaturated mineral tones and instead focus on sugary sweet pinks. Playful yet powerful, apply to everything from partywear and matching sets to footwear and accessories.

Prints and graphics

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Carolina Herrera



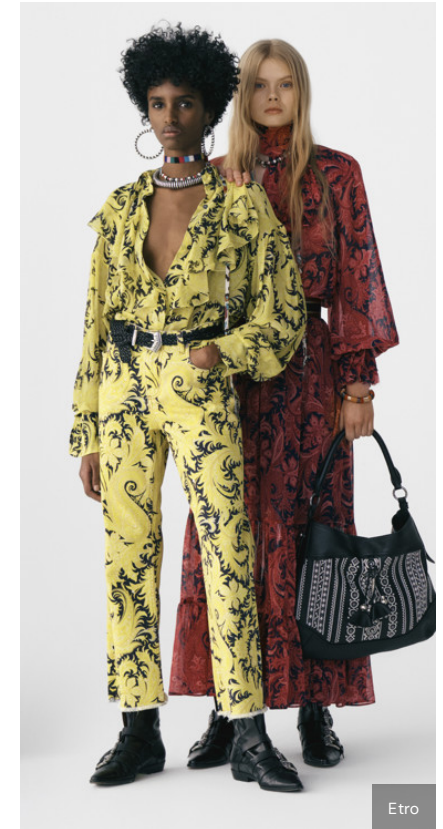
Deveaux



Nanushka



Erdem



Etro

#polkadot

Conscious of the new cautious consumer, designers focus on familiar print trends for Pre-Fall 21, but basic doesn't have to mean boring. Amp up the energy via playful colourways and head-to-toe applications.

#trueleopard

Leopard print makes a resounding return, with many influential designers opting to ground collections with this failsafe print. Refresh this commercial staple via scale and colour to entice consumers.

#graphicmonochrome #darkgroundflorals

Monochromatic palettes made a comeback across Pre-Fall 21, tapping into the consumer desire for items with longevity. Use black and white colourways to renew commercial animal prints, stripes, florals and spots.

In line with our Phantasmagoria trend, florals evolve with a moody edge. Grounding florals with a dark base offers year-round wearability and allows the wearer to take the item from day to night.

#boldbaroque

In line with our #eclecticfolklore story, bold Baroque motifs emerge as one to watch. Designing for digital proved popular, with colour-fuelled prints sure to stand out on-screen uptrending.

Materials and details

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#heritagechecks

Designers utilise familiar and fail-safe checks to add a casual touch to smarter silhouettes. Plaids offer an obvious choice for shirting weights, but consider felted tartans to upgrade the

#satin

Key to our #everydaydecadence story, satin is the perfect quality to instantly elevate simple looks. Update wardrobe staples such as wrap dresses and fluid shirts with lustrous qualities for a touch of easy indulgence.

#femininefrills

Continuing the #prettyfeminine and #cottagecore directions, frills and ruffles appear heavily across Pre-Fall 21. For best application, tap into #abovethekeyboarddressing

#lace

Lace makes a comeback, taking a more ladylike direction than last season's openwork. Clear for Pre-Fall is the hi-lo styling direction, with designers pairing demure party dresses with chunky boots or even over leggings.

#leather

While key for our #moderngoth direction, designers also utilise leather qualities for smart-relaxed pieces and casual matching sets. Where possible, focus on responsible developments and vegan alternatives.

and focus these details on
sleeves and collars.

Apparel key items

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#luxeloungeset

Hitting two trends at once, the luxe lounge set nails both the desire for upgraded comfort and taps into uptrending #matchingsets. Perfect for #twomilewear, these sets are ideal for couch-to-office dressing.



#formaljerseydress

Offering a dressed-up aesthetic without compromising on comfort and ease, the formal jersey dress reigns supreme. A great vehicle for experimentation, explore prints, fabric manipulation and embellishments.



#theblazer

While tailoring may not currently be an obvious choice, don't discount the versatility of the blazer. The easiest way to smarten up a WFH look, consider jersey blends and gently oversized fits for maximum comfort.



#cardigan

Supercharged by the current pandemic, knitwear's huge resurgence has seen cosy items such as the cardigan become a must-have. With hi-lo dressing proving important, pay special attention to this versatile throw-on piece.

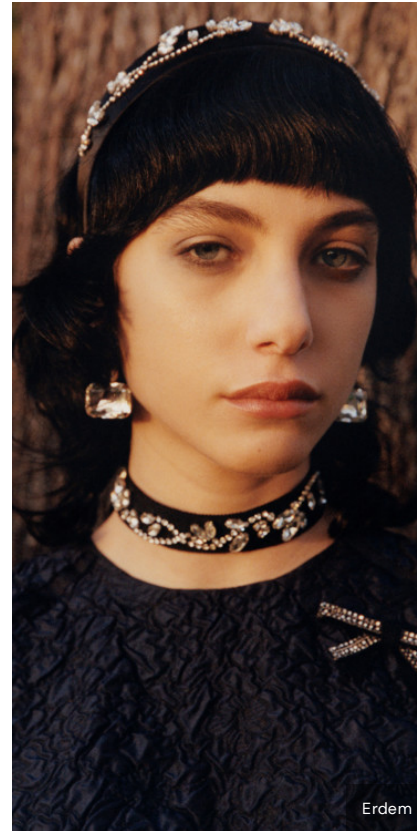


#legging

This lifestyle-driven item effortlessly treads the line between casual and formal when upspecced via fabric bases and elevated detailing. Styling with blazers offers an easy entry into our #workleisure story.

Footwear and accessories key items

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#supersizedframes

Supersized sunglasses silhouettes dominate the eyewear category for another season. Noted on round, square, aviator and shield styles, these items not only look good, but offer an element of #protectedesign.

#extremeembellishment#statementjewellery

Part and parcel of our new #moderngoth story, extreme embellishment permeates both footwear and accessories; think tough studs, spikes and zips applied to hardwearing leathers and even two-mile slippers.

As consumers spend more time than ever in front of a screen, offering statement-making jewellery has never been more important. Tap into our #everydaydecadence messaging via decadent #jewellerification details.

#quiltedbag

Equally popular across apparel, quilted details are confirmed as a must-have. Use as a simple way to update key shapes, including the top-handle bag and everyday tote.

#statementmule

Influenced by the success of #twomilewear, slip-on mules get updated via platform silhouettes and track rubber soles. The perfect accompaniment to our #workleisure story, explore smart leather and durable rubber finishes.

Denim

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#superwidepant

Wide-leg jeans emerge as a go-to, ideal for sweatpant-fatigued consumers that have become comfortable with looser and more relaxed shapes. Consider Tencel blends that offer more drape and a comfortable handle.



#sustainabledenim

Technologies such as laser are becoming widely embraced as luxury brands become more conscious of their environmental footprint. Use this technique to replace traditional patterns and logo prints.



#panelling

Panelling has been a huge trend across apparel and there's no limit to its use on denim. Offering great sustainable credentials, explore contrast textured panels in deadstock fabrics for a cosy winter touch.



#distorteddye

As the #tiedye trend shows no sign of slowing, we're continuing to track the rise of distorted dye effects. Designers ground bold washes with autumnal tones for a commercial update.



#femininefrills

Echoing apparel, romantic frills also drive design details within denim. Tap into #abovethekeyboardddressing and frame necklines with delicate flounces and frilly accents.

Methodology

WGSN catwalk analytics

- WGSN is supplied with images covering all the major catwalk shows and pre-season collections. Each look is classified with its individual garments, allowing us to get accurate counts for each product classification. This ensures the tags apply at a garment level, not to the whole look. The garments are then given further keywords for style, silhouette, neckline, length, print and pattern, detail, embellishment and fabric. This process is completed by our panel of fashion-trained image taggers. Each image is quality checked for accuracy by our in-house team
- This report uses data based on London, Milan, Paris, New York and Pre-Fall 21 and 20 shows tagged as of January 12 2021

Definitions

- Product, assortment or category mix: proportion of a set of products over a larger set. An example is volume of dresses over the whole volume of apparel:
- $\% \text{ dresses within apparel} = (\text{volume dresses} / \text{volume apparel}) * 100$
- YoY: year-on-year
- YoY changes: % difference between the % of each category or keyword within its larger set
- In the copy, % of the mix is rounded to the nearest integer (44.8% → 45%, or 44.2% → 44%), but YoY changes are calculated including one decimal point
- Percentage point (ppts): a percentage is the proportion of a set of products over a larger set, an example is new-in trousers over new-in apparel mix. A percentage point computes the arithmetical difference between percentages; going from 40% to 44% is a 4 ppts increase



- Apparel mix contains the following categories: coats, blouses and woven tops, dresses, knits and jersey tops, jackets, jumpsuits, skirts, sweaters, shorts, swimwear, trousers and intimates