

THE USE OF TREND  
FORECASTING IN THE  
PRODUCT DEVELOPMENT PROCESS

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THE USE OF TREND FORECASTING  
IN THE PRODUCT  
DEVELOPMENT PROCESS

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## **Declaration**

No portion of the work referred to in this thesis has been submitted in support of an application for another degree or qualification of this or any other university or institution of learning.

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## *Abstract*

Fashion trend forecasting is often personnel and company dependant and is more likely to be influenced by intuition and personal inspiration. Trend forecasting had been regarded as a driving force of the fashion industry in determining the new fashion trends in fabric, colour and style. There is a dearth of information on the utilisation and application of trend forecasting. There was a need to explore the application of trend forecasting within contemporary design and retail environments. Hence, the rationale of this investigation was to identify how and where trend forecasting is incorporated in the product development process.

Soft Systems Methodology (SSM) provided the framework to the primary research. The process focussed on the trend forecasting agencies and how trend forecasting was used by the fashion industry. The concept of fast fashion and its role in changing the model of fashion trend forecasting was critically analysed working through the stages of SSM. Interview data and process mapping were used to establish theoretical models which were tested, refined and validated for the timescales and process used in seasonal and fast fashion contexts. The research was addressed within the context of the UK clothing sector.

From an initial analysis of the issues, shortcomings were identified in the seasonal process. These were linked to the buyers and designers having limited communication and fragmented decision making during the range planning process. The 'open to buy' process conducted at the end of the range planning season to address 'close to season' fashion relies upon repeated orders and unplanned inputs, copied from their competitors. This is because it is difficult to design completely new garments for the required timeframe.

In the fast fashion process, it was found the designers had no input into the 'bought-in' fashion range resulting in a lack of continuity of how the total range would appear. Fast fashion relies upon 'bought-in' fashion and the 'open to buy' process relies upon trends based on 'current influences' and repeat orders because it is quicker than producing completely new garments within a reduced timescale.

The final phase of this research contributes to a new synthesis of information relating to trend forecasting in contemporary design, marketing and retailing environments. A critique

of the theoretical models was carried out for areas not discussed before with trend forecasters, buyers and designers. These industry personnel explained how trend forecasting was used in the model stages, alternatives to trend forecasting, the process, timeline and how 'bought-in' fashion is used as a solution to fast fashion. This research has resulted in revised models where trend forecasting is successfully located within the seasonal and fast fashion product development. The crux of this research identified the consultation meetings and communication channels which were accurately located in the new models. The models document how key personnel interact, specifically the trend forecaster, the product line manager, the designer and the buyer. In the fast fashion model the 'bought-in' range is clearly distinguished from the seasonal range. The new models quantify the timeline for seasonal fashion, fast fashion and 'open to buy'. The current fashion forecasting system is derived from seasonal fashion and therefore reliant on long lead times. The rise of fast fashion provided the opportunity to identify a taxonomy of models with a shortened time frame.

The original contribution to knowledge lies in the seasonal and fast fashion models directly arising from this research, that would facilitate the key personnel involved in the fashion industry to incorporate in their new product development. This results in greater involvement of personnel leading to efficient utilisation of time, resources and expertise in the trend forecasting process.

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# **Chapter 1: Introduction and background to study**

## **1.1 Introduction**

Trend forecasting is an important part of the design process carried out in the design and marketing field for fashion. Many sources are available and invariably are used by fashion designers and buyers throughout the range development process from which to draw inspiration. Trend forecasting agencies specialise in providing a subscription service to industry providing information on fashion trends encompassing colour, fabric and style prediction. The forecasting agencies offer an extensive range of information and prices. For example, a lifestyle report costing £600 and seasonal trends costing £990 each. Several of these trends and reports may be required each season, to gain a proper overview of the season, from either one or more of the trend services dependant on the company budget.

The fashion forecaster's role is to predict style trends whilst working closely with fashion industry personnel. At a meeting for designers and buyers for trends development held in Manchester, (19<sup>th</sup> June 2014), senior trend researcher (Participant 1) with Trendstop, who was interviewed stated that trends are first spotted several seasons in advance, this can be between one season (6 months) and six seasons (3 years). The process of trend forecasting involves collecting; evaluating, analysing and interpreting data to anticipate what trends should be included in the trend package, which will affect the future success of the garment ranges for the retailers. In the experience of the researcher, trend forecasters are influenced by intuition, personal inspiration and interpretation to create and develop these trends. The forecaster from Stylesight (Participant 2) reported that the trend forecasting team has a multi-disciplined, collaborative approach where senior management, programmers, editors, marketing, sales, and photographers all work toward one goal. The team has experience in design, fashion styling, retail, art, journalism, graphic design, textiles and product development. For example, the Paris team of designers is comprised of industry professionals who are responsible for forecasting the trends. In New York the team of editors and foreign correspondents are responsible for creating the daily online content. The editors travel extensively observing the trends from a global perspective and pin-point the emerging 'micro' trends. These 'micro' trends are seen as the seeds of what become 'macro' trends (Anon, 2010a).

Trend forecasting is used originally by designers when planning the garment range and then by the buyers to modify the range during the product development process. The trend forecasting process has evolved over the last five years into a more complex process due to the fast pace of trends required within the fashion industry. Secondary sources of information published on the trend forecasting process is briefly outlined in current literature but there is little in depth detail on the methodology of how the process is carried out or the model used. The trend forecasting process has become an integral part of the many job roles within the fashion industry. Personnel such as designers, range developers, buyers and merchandisers all develop their own ideas on trends and use trend forecasting information supplied by the trend forecasting agencies. Trend forecasting agencies sell their prediction packages to the fashion industry, who also use their own system of sourcing and developing trends. It is necessary to have an appreciation of how the trend forecasters develop trends, how this process works and how the designers and buyers use this information in the fashion industry. This is setting the scene and providing the background as to how trend information affects design decisions is used by the manufacturing and retail sectors.

The researcher needed to explore methods employed by the forecasters for how the forecasting process is undertaken in the trend forecasting agencies renowned in fashion industry. Information required focussed on recording the tasks and sequence of events conducted within the forecasting agency in order to produce the trend packages. Key themes need to be identified, such as how fashion trends are identified, the depth of information available, the importance of the timing of a trend and the processes undertaken within a forecasting agency. The role and skills of the forecaster need to be determined, who used trend forecasting and which specific markets it applies to.

During the first phase of the research interviews were conducted with the trend forecasters from the trend forecasting agencies. The problems and factors affecting the forecasting agencies were identified and the process undertaken in order to produce the trend packages. This process was recorded into an initial model (refer to appendix E). In the second phase of the research interviews were conducted with personnel from UK fashion retailers to ascertain how the trend forecasting services are incorporated into the product development process. Soft systems methodology (SSM) was used to interpret the primary

research data. The appropriateness of SSM to this research was that this methodology provided a set of guidelines for examining systems with a view to proposing improvements. The system was used to describe the current situation and what it aimed to be. SSM distinguishes between the real world and the systems world activity. This provided an experimental area to examine a system for feasibility with a view to proposing improvements. The problems for the trend forecasting agencies were examined using SSM and the vagueness and lack of structure for how trend forecasting was used in the product development process by the retailers. Theoretical models were established using SSM, including trend forecasting information to meet the required timescales for seasonal fashion and fast fashion. These were tested in industry for seasonal fashion and fast fashion contexts.

Forecasting is discussed in current literature within the field of the trend forecasting agencies about sources of information they used but no explanation of the detailed process used to develop the trend package within the forecasting agency. There is lack of published literature and research conducted in this area of constant change. SSM was used as an experimental process, where the data was used to conceptualise a structure from what was an 'unstructured' situation. Trend forecasting should be regarded as an 'unstructured' situation of design and product development and there is great value in conceptualising a structure.

As consumer lifestyle has become more dynamic, so trend forecasting has become more intense in pace. Initial contact with the forecasting agencies and fashion industry personnel indicated that their businesses are affected by the fast fashion phenomenon. The principle behind fast fashion is to reduce the product lead time in order to get the product from concept to consumer as quick as possible (Barnes and Lea-Greenwood 2006, Hines and Bruce 2007, Sull and Turconi 2008). The term 'fast fashion' has become a common description used by retailers, who create their own meaning of this term to describe fast fashion. However, this is not a completely new concept. Quick response (QR) originated in the 1970's and 1980's as clothing suppliers were feeling the competitive pressure from the Far East and other lower-cost supply countries. The intention was to reduce risk by working with smaller batch sizes, allowing demand to be matched by supply. However, QR was always applied to traditional seasonal fashion and did not attempt to develop very

short in-season design and new product development (NPD) processes. This concept was achieved by relying upon competent relationships and management of the supply chain (Hines and Bruce 2007). This discussion poses the question, how have trend agencies been affected by fast fashion? The impact of quick response and fast fashion on the fashion trend forecasting agencies means that they are eager to find a strategy to react to this phenomenon. Participant 1 from Trendstop states:

*'At Trendstop we are addressing quick response needs through our analysis and provide both short term and long term forecasts. We continue to update our forecasts from the time they are made through to 6 months in advance. We feel it is crucial to track and update our trends.'*

(Anon, 2014b)

This suggests the hypothesis that consumers are the driving force of fashion rather than the retailers and raises the research question how trend forecasting information is used? (Anon, 2014b) went on to say;

*'The consumer benefits by being able to buy fashionable pieces at affordable prices. High street retail has made being in fashion an option for the masses, not just the super rich. The retailer must provide pieces the consumer wants, however the consumer can only buy what the retailer has – a catch 22!'*

A review of the literature published on this subject (discussed in chapter 2) highlighted a dearth of information offering any in-depth understanding of the complexities of this process. The value of this literature was assessed to establish the level of the body of knowledge of the process. Trend forecasting had been regarded as a driving force of the fashion industry in determining the new fashion trends in fabric, colour and style. There was a need to explore the application of trend forecasting within contemporary design and retail environments. Hence, the rationale of this research was to identify how and where trend forecasting is incorporated in the product development process. This would establish base line knowledge (in the form of the conceptual models) to understanding the behaviour of the fashion retailers in their use of trend forecasting.

The researcher needed to acquire knowledge from buying and design personnel in the fashion industry to determine how trend forecasting was incorporated into the design and product development process. It was necessary to identify where exactly trend forecasting information was incorporated into the product development model, from both the buying and design viewpoint. The relationships and communication channels between the buyers and designers as to how trend forecasting information was used when range planning needed to be identified and the timescales involved in the 'open to buy' process and the product lead times for fast fashion in the supply chain process. Timescales and processes used within the design and buying sector of the industry needed to be determined in order to quantify the timeline for seasonal fashion, fast fashion and 'open to buy'. This information is not available from current literature.

The current fashion forecasting system is derived from seasonal fashion and therefore reliant on long lead times. Therefore the fast fashion retailers behave differently from the seasonal fashion retailers. The fast fashion model is characterised by a lack of connection to the personality of a single stylist or a specific place; it belongs to the current global culture of fashion and brands. Fast fashion leaders, H&M and Zara originate from Sweden and Spain; these countries had little influence on the development of the older high fashion and prêt-à-porter models. Fast fashion does not require consumers to adapt to the rigid dates of the traditional fashion system of the seasonal retailers. Instead, the model presents consumers with continually renewed styles, for purchase as they require (Gabrielli *et al.* 2013). The rise of fast fashion provided the opportunity to identify a taxonomy of models with a shortened time frame. Two models are required because they represent the differences in the two systems in the models.

Previous studies by Gaskell (1992), Carr and Pomeroy (1992), Keiser and Garner (2007) and Easey (2009) have not explicitly presented the application of the trend forecasting in model development. The application of trend forecasting in product development process has not been discussed by authors Goworek (2007), Hines and Bruce (2007), Brannon (2011), Eundeok *et al.* (2011) or Mckelvey and Munslow (2012). The communication channels between personnel as to how the trend forecasting was used when range planning has not been recorded or the comparisons of the timescales used within the design sector of the industry. The contribution to knowledge lies in the seasonal and fast fashion models

developed in this research, which would benefit key personnel involved in the fashion industry to incorporate in their new product development. This results in greater involvement of personnel leading to efficient utilisation of time resources and expertise in the trend forecasting process. Little exists within current studies on the use of trend forecasting in contemporary design and retail environments which is represented in the new models.



## 1.2 The nature of trend forecasting

It is necessary to appreciate the skills required by the trend forecaster, such as intuition, awareness and observation and how these skills are utilised to understand the trend forecasting process. The forecaster's role is to identify style trends by addressing what is likely to happen now and in the future working closely with the retailer, buyer and manufacturer (Perna 1987). To forecast a trend it is essential to have a good understanding of world events encompassing current affairs, culture influences, creative, technical and socio-economic trends and the effect this will have on the consumer. It is also useful to study the past, for how people reacted to parallel situations previously and what emotional connection points are there, which is another way of predicting the future. Seivewright (2007) recognises good fashion awareness is essential to progress within the fashion industry. Brannon (2011) explains fashion forecasters require a mental map of the market place, the seasons and trade shows, the locations where innovators are likely to found, the supply chain and the retail conduit to consumers. Forecasters use these maps to organise their observation and directional information. Tunnel vision reduces the flexibility that is essential for decision making in conditions of high speed change. Perna (1987) believed insight not speculation differentiated the result of trend prediction making some merchandise timeless and classless. The forecaster is constantly required to interpret trends from diverse sources and note the common denominator.

*'Fashion forecasting is not unlike forecasting the weather, the Stock Market, or the success of a Broadway show. It aims to take all contingencies into account and come out with a responsible score. The forecaster must be flexible enough to shift gears when the unexpected occurs'.*

(Perna 1987:91)

The qualitative research method conducted by the trend forecaster involving awareness and observation is not recorded anywhere, therefore there is no way of knowing if the memory data is accurate or not. Brannon (2011) explains forecasters attempt to understand fashion change, track the development of the trends and recognise patterns in the data to be able to interpret their observations. Anon, (2010a) reported that Stylesight is constantly observing catwalk collections, trade shows, street, retail, as well as home design, film, art,

media, music and other cultural movements. When they start to see similarities or certain intertwining themes developing this is the visual starting point for it becoming a trend. Brannon (2011) recognised that mapping celebrity influence has implications for the forecaster. Celebrities function as advisors and role models for consumer aspirations, firstly as themselves in interviews and editorial coverage and secondly as the fictional roles they play. The forecaster is aware of celebrity influence which can be mapped to the appropriate consumer and market segment. They may have been selected from an influential designer and in most cases these styles will be ahead of the fashion trend. It may be a style that will not gain momentum for a couple of seasons (Anon, 2014b).

### **1.3 The thought process for decision making of forecasting**

The forecasting agencies have an extensive product mix dealing with possibilities, alternatives, the unexpected and niche markets. Through the process of decision-making trend forecasting is communicated, which is their key to success. Companies invest in trend information to re-enforce their beliefs in the product range. This suggests the hypothesis that companies use trend forecasting information to give them confidence in their decision-making and for back-up to their choice of trends. The fashion trends process is one of constant change, requiring the understanding of the current, confronting the unexpected and contemplating the future. It is not only the length of a hemline or a seasonal colour which is taken into account it is more sophisticated, comprehensive and in-depth than that. It is essential to recognise broad trends, understand their significance and being able refocus on the new direction (Perna 1987).

At a meeting for buyers and designers for trends development (Manchester, 15<sup>th</sup> May 2014) with Trend Bible, (Participant 3) described their methodology behind trends research as examining the catalyst for the cascade of influence driving change. For example, the catalyst could be the overload of work, recession or family issues. The repercussions in attitudes and behaviour are analysed for four or five years on, providing the evidence of change. The application of the trend forecast can be interpreted in different ways by key personnel in the fashion industry. The strategist will explore the 'big picture' for influences they should be responding to. Marketing will research the key narratives to communicate. The buyers will analyse how heavily they should invest in a trend and which market it should be pitched at and the designers will work on the aesthetic influences.

## **1.4 Aims of study**

The goal of this study is to analyse trend forecasting to provide an understanding of the process and to express this knowledge as a conceptual model. The following four aims were identified as appropriate to allow the goal to be achieved.

1. To analyse the role of trend forecasting within current product development processes.
2. To further develop the knowledge base of the trend forecasting discipline.
3. To design and evaluate a taxonomy of models relating theory and practice of new product development and trend forecasting.
4. To contribute to the evaluation of trend forecasting in contemporary design, marketing and retailing environment

## 1.5 Overview of chapters

**Chapter 1 - Introduction and background to study.** In this chapter the main areas for consideration in this research, how the trend forecasting process is carried out in the trend forecasting agency, where trend forecasting is used in the product development process in the fashion industry by the retail buyers and designers and the definition of seasonal fashion and fast fashion in the retail environment are outlined. These areas are all interrelated and all must be considered in relation to the use of trend forecasting in the product development process. The outcome is a contribution to understanding how trend forecasting is used in the design, buying and retail environment. Detailed aims are presented and a rationale which outlines reasons for this study and the contribution to new knowledge.

**Chapter 2 - Review of literature in the context of using trend forecasting in the fashion retail business.** This chapter examines the current literature available to date and establishes the current body of knowledge of how trend forecasting is used within the product development process. The retail fashion structure is explained in the context of seasonal and fast fashion and the business planning functions outlined. The fashion industry dynamics are described and where trend forecasting information fits into the product development process. Each section in this chapter charts the research development in these particular areas and the progression of knowledge supporting this research and where there is a lack of supporting evidence available of any in-depth understanding of the use of trend forecasting in the product development process.

**Chapter 3 - Approaches implemented to investigate the application of trend forecasting in the fashion business model.** In this chapter approaches implemented to investigate the application of trend forecasting in the fashion business model is discussed. A qualitative approach to data analysis is outlined, the primary research, the piloting and final interview questions are discussed and the application of these methods. Semi structured interviews and process mapping are used to form the case studies of the trend forecasting agencies and the UK seasonal and fast fashion retailers. Soft Systems Methodology (SSM) by Patching (1990) is the system used and discussed as a tool for analysing and understanding the trend forecasting process. The theoretical framework of

this system is explained, examples of where this system has been previously used and the justification for using this system.

**Chapter 4 - Outcomes from case study evaluation: Trend forecasting agencies.** The outcomes from the case study evaluation with the professional trend forecasters is discussed for how the trend forecasting process is carried out in order to produce the trends package. The results are discussed with reference to the trend forecast, the process model and the supply chain. The results relate to the forecaster's role in identifying, predicting and timing of the fashion trends in order to build the trends to produce the trends package. The problems for the trend forecasting agencies and the effects of quick response issues in the supply chain are identified and summed up in the findings. This data is used to establish process maps for trend forecasting in a trend forecasting agency.

**Chapter 5 - Challenges faced by the trend forecasting agencies in the fashion timeline.** Challenges faced by the trend forecasting agencies in the fashion time line are discussed. The three problems that are identified from the trend forecasting agency case studies are illustrated in a rich picture format in line with the SSM for stages 1 and 2 of the system. The data recorded in the process maps, illustrating the key relationships and the sequence of events for producing the trend package, is used to build a trend forecasting model. This visual model shows the sequence of events when developing the trend package in a trend forecasting agency. From this stage in the research project, it is explained that the research moves forward to how trend forecasting information is picked up in the fashion industry and used by the buyers and designers. The problems identified by the trend forecasters are probed further with the buyers and designers.

**Chapter 6 - The buying interview results for seasonal and fast fashion retailers.** The buying interview results are discussed beginning with the pilot interview, explaining how people were approached and asked for information, followed by the final questions which are presented in the themes of the trend forecast, the process model and the supply chain, which formed the retailers case studies for seasonal fashion and fast fashion. The results discuss the usefulness and effectiveness of trend forecasting and the errors of trend forecasting. The relationships, communication channels and the decision making process are outlined for the product development process. The planning stages, consultation

meetings of how the trend forecast is used when developing the garment ranges is outlined. The product lead times, criteria for quick response and timescales in the supply chain are explained. The summing up identifies the problems for the seasonal and fast fashion retailers and outlines the process model format for product development.

**Chapter 7 - The differences and limitations between the seasonal and fast fashion conceptual models.** The differences and limitations between the seasonal and fast fashion conceptual models are discussed. The process of working through the soft systems methodology (SSM) is outlined and how it is used in developing the conceptual models. The testing of the conceptual models is discussed in the buying and design sector of the industry for fast fashion and seasonal fashion contexts, questioning the realistic interpretation of the models in the use of trend forecasting, the timeline, the process and any omissions or discrepancies between the model and their methodology when designing the garment ranges. The differences identified in these timescales and planning stages were discussed from the feedback given. The benefits and validation of the models for seasonal fashion and fast fashion by industry personnel are outlined in the summary.

**Chapter 8 - Implementation of the new models in the fashion business sector.** The changes implemented into the seasonal and fast fashion models are outlined and the results of the validation for these revised models discussed from the industry personnel feedback. The themes discussed are referring back to the literature review sections, discussing the responsibilities of the designers and buyers in the range planning process. The stages in the product development process where trend forecasting is implemented, the relationships and communication channels, the product lead times, the buying cycles and the timescales for new trends are also discussed. The changes to the revised models completed and validated led to the proposed new models for seasonal and fast fashion. The summary outlines the findings for the seasonal and fast fashion models and explains the significant contribution to new knowledge for the product development process.

**Chapter 9 - Overall conclusions and recommendations.** The conclusions and recommendations for further study are stated and the outcomes are related back to each aim. The importance of the models and how the models are drafted are discussed and the key elements not discussed before in the literature. Significant new knowledge is explained

in the approach, the information gathering through techniques implemented and new information never been discussed or researched before. The original contribution to knowledge lies in the seasonal and fast fashion models directly arising from this research, that would facilitate the key personnel involved in the fashion industry to incorporate in their new product development. This results in greater involvement of personnel leading to efficient utilisation of time, resources and expertise in the trend forecasting process. Discussion is given to recommendations for further study, regarding research of this nature and includes an outline of recommendation for improvements to practice. This would facilitate key personnel involved in the fashion industry to incorporate in their new product development.



## **Chapter 2: Review of the literature in the context of using trend forecasting in the fashion retail business**

The purpose of this chapter is to examine the extant literature and to establish the body of knowledge regarding the use of trend forecasting in the product development process, essentially what is known about the subject currently, identify where there are gaps in current knowledge and identify research areas. Various perceptions will be highlighted from industry professionals and concepts that are under-developed or outdated in relation to the extant literature. There is little information existing on how trend forecasting is used within the product development process, even though those involved consider this process to be the driving force of the fashion industry (Diane and Cassidy 2005). The recognition of the need to add to the literature for a more substantial understanding of the trend forecasting process initiated this study. The focus for this research is high street fast fashion relating to men's and women's wear. The seasonal and fast fashion concept concentrates mainly on women's wear, it extends into menswear but here the focus is more on detail changes to the product rather than changing the garment style.

Trend forecasting information is a resource sold by trend forecasting agencies to the fashion industry. The trend forecasters attempt to accurately forecast the fashion trends that will appeal to consumers in order for the fashion industry to produce products that will sell. Fashion trends can apply to seasonal forecasts up to twelve months ahead or close to season fast fashion trends. Fashion trends are broad-based and have to be interpreted to suit individual retailer's customer profiles. The trend forecaster's role when working in the trend forecasting agency is to identify and interpret such trends working closely with the retail buyers, product developers and garment designers. Fast fashion has created a catalyst of problems for the trend forecasting agencies in terms of trend prediction, because of the demand for frequent new trends. This is coupled with the uncertainty of consumer response to new trends and the unpredictability of consumer buying habits due to the rapid changes that take place in consumer lifestyles. The trend forecasting agencies need to implement a strategy to deal with this change. The established supply chain format of working up to two years ahead is also being challenged by the fast fashion system. The shorter lead times intrinsic of fast fashion and how quickly trends can be interpreted into garments and delivered to store is creating a problem for the trend forecasting agencies as

their trend information is becoming more obsolete in the product development process. The problems therefore identified are in the product development process model, hence an improved model or series of models are suggested to address these problems.

## **2.1 Trend forecasting in the product development process**

This section addresses secondary sources, which provided the background information as to how the trend forecasting information is used by the fashion industry. Some of the authors identified below addressed the area of trend forecasting were for example, Brannon (2011) and Perna (1987) offered the most comprehensive and valuable contribution to the subject knowledge and were used for an overview of the fashion industry structure. However, Brannon (2011) only covered aspects of how trends were developed in terms of information gathering by the forecasters and industry practices. More focus on the details of trend forecasting stages in the product development process is needed to understand the discipline of trend forecasting.

Perna (1987) underscored the role and skills of the trend forecaster within a trend forecasting agency. However, important information regarding the process used for developing the trend package within a trend forecasting agency is lacking. Issues affecting trend forecasting agencies, such as fast fashion and the effect of quick response on fashion, were not discussed by either of these authors. There is no reference to the timeline differences in relation to fast fashion conflicting with trend forecasting or the traditional calendar of set seasonal fashion events within the fashion industry.

There is a lack of explanation and understanding in this subject area, the information found is limited in quantity and quality of detail about the application of trend forecasting in product development. There is no evidence of any in-depth analysis of the current trend forecasting information used when modelling the product development process. The authors Brannon (2011) and Perna (1987) did not fully explore, explain or examine the area of trend forecasting in the product development process. The design process and the designer's perception were not part of the product development process where trends were selected. Their perspective is that of the buyer. The planning stages where the trend pack

was used are not highlighted, nor that a different kind of trend information could be used for the 'open to buy' process. Perna (1987) did not cover the area of fast fashion but made useful references to industry processes and practices and contributed to early stages of the research process for the literature review.

McKelvey and Munslow (2008 and 2012) provided a simplistic view of the use of trend forecasting in the product development process from the researcher's personal experience of working with trend forecasters from the designer's point of view in the fashion industry. These authors offered only a basic introduction to trend forecasting and limited analysis of the product development process. Trend forecasting within trend forecasting agencies is discussed by reference to their skills and sources of information used for researching trends. The fact the fashion industry uses trends as a resource is referred to but there are no data regarding how trend forecasters analyse the trends or the sequence of events that takes place to produce the trend package. Granger (2012) discussed there being four types of forecasters working in observing and monitoring colour and fabric trends, social and economic trends and trends for target markets for products. However, there is no indication as to how the trend forecast is used in the various sector levels in the fashion industry. There is no connection made to show how the wider fashion industry uses trend information during the product development process.

Seiveright (2007) discussed the trend forecaster's inspiration for developing fashion trends and their trend awareness having to be on a global scale but has not attempted to assess the accuracy of trend forecasting or whether it could be improved during the product development process. There is no explanation of how the trends are translated or at what stages the trends are referred to by the designers and buyers in this process. There is little written evidence regarding trend forecasting even though it is considered the mainstay of the fashion industry. There is no literature coming from the designer's viewpoint. Consequently, this research has concentrated on supplementing the literature with information from more generic fashion industry publications.

Hines and Bruce (2007) and Easey (2009) are fashion marketing and fashion business orientated, examining the supply chain, global markets, fast fashion strategy, new technologies, fashion e-tailing and the communication approach to marketing. Easey

(2009) and Goworek (2007) contained useful references for the organisation of the fashion industry, fashion buying and the retail buying sequence. The business of fashion branding, marketing and retailing is discussed by Tungate (2005), fashion branding by Jackson and Shaw (2009) but again with little value to the use of trend forecasting or the relevance of the designer's role in the product development process in the fashion industry. The product development process was described only from the buyer's viewpoint and any discussion points were based around the buying procedures in the design and buying environment. The exclusion of the designer's role suggests the value of this role is limited in the product development process. There is no reference to exactly when or how trend forecasting is referred to by the designers when planning the garment ranges in the critical path. The buying process takes precedence over the design process and is at the forefront of discussion. The team effort is discussed, but there are no details of how decisions are made, to whom people reported or how often decisions are made in product range development.

Additionally, Keiser and Garner (2007) offered a wide scope of information regarding the apparel product development process in terms of the fashion cycle, creative planning and colour forecasting but mainly concentrated on mass production and distribution as did Waddel (2004) and Rousso (2012). Frings and Stevens (2002) emphasised on consumer behaviour and the effect of celebrity influences on trends and the consumer. Brannon (2011), Jones (2011) and Rousso (2012) refer to short and long term forecasting and the fashion theories of trickle down, trickle across and bubble-up. This was useful for understanding how the movement of fashion innovation is analysed and how the designers aim to have the right products at the right time to meet consumer demand. However, it does not aid the explanation of decision making processes during range planning by the designers and how designers use this information in relation to trend forecasting.

Diane and Cassidy (2005) and Eundeok *et al.* (2011) discussed colour forecasting and the process involving the development of colour palettes by the colour forecasters, which contributed to background information into the colour forecasting process for current research. However, they did not address how the designers use colour forecasting or explain the in-depth design process for range planning from the designer's aspect as to how often they use the trend forecast or how often they collaborate during this process.

The focus was on soft systems methodology (SSM) for model development rather than the colour forecasting process. Cassidy and Cassidy (2012) focussed on using SSM to improve the colour forecasting process. This was useful for the way colour forecasting was incorporated into model development using SSM and is a precedent for this methodology to be used again in this research to develop models for trend forecasting.

### **2.1.1 Fashion industry practices for product development**

Research articles have provided a more updated view of fashion industry practices based in the areas of supply chain management and product development. Research articles contribute to useful information regarding the collaboration of the designer, manufacturer, buyer and supplier. Tyler *et al.* (2006) emphasised the importance of close relationships within a team effort and explained the effects of decision making in order to achieve successful product development. Sheridan *et al.* (2006) and Doyle *et al.* (2006) also discuss the importance of close relationships in supply chain management and highlight the weaknesses in design, production and marketing relationships resulting from fast fashion business strategies. These close relationships, communication channels and responsibilities between the buyers and designers are not illustrated in any product development models to date. In this research, these roles will be located within the proposed new models for product development.

Other research articles relevant to this research are referred to because they establish the context of fashion business functions within the industry and issues directly affecting the product development process, such as, quick response for fast fashion. Research articles by Hayes and Jones (2006) and Barnes and Lea-Greenwood (2006) contributed to industry practices for changes in the supply chain format and the challenge of fast fashion cycles for the retailers. Production processes and fashion cycles affected by fast fashion is questioned by Tucker and Jones (2002). Birtwistle *et al.* (2003) discuss quick response perceptions of the UK fashion retailers and Bruce and Daly (2006) observe the flexibility of fast fashion. Analysis of this information gave an outline of industry practices but the design process within product development is not acknowledged. These changes and

challenges are based on the buying and marketing practices and do not include the designer's views or involvement in the range planning process.

Lead times are discussed by Carruthers (2003), Ferdows *et al.* (2004) and Sull and Turconi (2008). They stress that the fashion industry is reliant on long lead times and varying timescales for close to season fashion. Researchers have approached product development from the buying aspect but the timescales are not clear. These timescales needed to be established in the fast fashion timeline within the design and buying sector of the industry and used to contribute to the development of new models, which have not been prioritised in existing models from previous research.

Research articles examined have a connection with this study in the fact that they concentrate on model development, but the outcomes are different to those of this study. Ames (2008), for example, developed a conceptual model from a designer's personal viewpoint of the creative process in data gathering for trend research. This was more about problem solving and finding solutions for the individual designer and not linked within the product development model for range planning. Fraser *et al.* (2010) based discussion around the use of trend forecasting against the time-frame of traditional models of production, which is breaking down as lead times and traditional relationships are challenged by global interconnectedness. However, this is discussed within a fashion craft environment rather than the fashion industry product development process. The study only discussed global changes affecting the application of trend forecasting in model development.

Other research covered fast fashion but in relation to consumer behaviour and the use of technology to track consumer habits for fast fashion. Specific articles relate to fast fashion from the consumer perspective as in Gabrielli *et al.* (2013). Byun and Sternquist (2011) discuss the effect of fast fashion on consumer behaviour in response to the quick turnover of fashion products, whilst Bhardwaj and Fairhurst (2010) discuss the economic and psychological investment strategy in range planning, involving high volume styling at low cost. All this is relevant to this study regarding fast fashion, but of less so for new model building for fast fashion.

Hodges and Damhorst (2008) conducted research into how technology could be used to develop products involving the consumer's views. They proposed that, in the future, designers will utilise consumer engagement at the design stages of the process. The research was more concerned with the progression of technology, but illustrates how future change involves the consumer more in design concept. This suggests the hypothesis that the consumer is the problem solver behind reducing trend forecasting error. If valid, consumer engagement has the potential of alleviating the problem of trend error for the buyers. These research subjects are useful for information regarding how technology can be used to reduce the risk factor involved in trend forecasting for fast fashion.

Gaimster (2012) discussed the inaccuracies of trend forecasting observing that, the forecasters supplied broad trend information that needed reinterpretation and contextualisation in order to be useful to the client. The trend might be accurate, but it would be possible for the client to interpret it in the wrong way or to select the wrong trend for their consumer. The usefulness of trend forecasting is also adversely affected by the sheer volume of information that has to be filtered and analysed from the online trend forecasting agencies. The study concentrated on identifying the research skills required for trend prediction within reduced timescales driven by fast fashion. However, there was no explanation offered on how the product development model worked in relation to fast fashion. There was no reference on what mechanisms are used by the designers and buyers to manage the problem of quick response and the need for supplying the trends more frequently for fast fashion. In addition it was not clear as to how the trend forecasters and the fashion industry deal with the risk factor of missing trends or getting them wrong, or if there was a formal method of accounting for missing trends. Na Ayudhya *et al.* (2007) explored the ability to innovate from the tracking and visualising of trends and applying them to product design but focuses upon the developing countries. Outcomes concentrated on the limitations in using trend information and the benefits from close collaboration within the industry, which provided useful background information but did not assist with any model development for seasonal or fast fashion. The closest research to this subject area has been conducted by Wen and Xiaogong (2010) who designed a colour data base offering reliable colour prediction, but this again did not help in developing new models for this research.

### **2.1.2 Doctoral research with a connection to this study**

Recent research from several theses from across the world included eminent work which are discussed in this section below. King (2011) focused on how colour forecasting information is compiled, its use and accuracy within the fashion industry. The influence and impact on the supply chain were only analysed from tracking colour trends and a model for research into colour choice was developed, but this was not related to the product development process and was of little use in developing this research area.

Cholachatpinyo (2004) outlined the problems with the Thai fashion industry, in that the Thai designers are unable to originate fashion ideas. Strategies are discussed to enable the Thai fashion industry achieve an international reputation for fashion. Existing models taken from the western fashion process are refined to develop conceptual models for the Thai apparel industry for quick response. It is interesting that they are utilising western influences and fashion process models but these are about fashion theories, innovation and diffusion rather than product development models. Therefore, this research provides background knowledge, but does not assist with any model development in this study.

Dong (2007) discussed Vendor Managed Inventory (VMI), a collaborative strategy between the retailers and manufacturers to optimize the availability of products through a continuous replenishment approach. A model for VMI replenishment strategy in the apparel supply chain was proposed. This is not relevant for product development modelling. It does however, re-enforce the need for improvement in the collaborative strategy for retailers and manufacturers and confirms the need for close relationships in the supply chain.

These theses only had a remote connection to this study in the areas of the trend forecasting, colour forecasting and fast fashion in retail buying. They were useful for providing insights and focus for prominent current research subjects, but more importantly, they emphasised the lack of research into the use of trend forecasting from the designer's viewpoint in the product development process. Product development models for both seasonal and fast fashion were not represented. Although the above work highlighted a variety of topics, colour forecasting, trend forecasting and designers perception in product



development, it did not identify how trend forecasting was used by the designer's in the range planning process. Therefore, previous work highlights the need for this research to be undertaken.

### **2.1.3 Potential areas for implementing trend forecasting**

Trend forecasting is widely discussed by authors in the design and marketing field for fashion. Hines and Bruce (2007) discussed an array of sources available and invariably used by fashion designers and buyers throughout the range development process from which to draw inspiration. Brannon (2011) observed trend forecasting as being a resource used by personnel for product development in the merchandising and the marketing departments. Easey (2009) however placed emphasis on the range development being built around improvements, revisions to existing product lines and the incorporation of new products in the retail buying experience. The first essential stage would be to analyse what has happened in previous seasons to enable more informed decision making and to capitalise on previous success. Therefore placing this procedure above that of the trend forecasting resource.

Trend forecasters' work at all stages of the textile apparel supply chain, working to a varied time span for predicting the new trends. Trend forecasting can be either short range or long range. Short range is more accurate due to its shorter time span, varying from a few months up to two years. Long range forecasts covering three to five years have a higher risk of inaccuracy due to unforeseen events. Short range forecasts are therefore more appropriate for forecasting fashion and long range for planning marketing strategies (Diane and Cassidy 2005).

Trend forecasting information aids fashion change giving new direction to the brand or store strategy. Trend forecasting is described as '*plucking*' emerging trends from public information to help them to predict mood behaviour and the buying habits of the consumer. Sectors of the fashion industry disseminate information from colour and textile forecasts into themes that reflect the '*spirit of the times*' these forecasts are used in the

supply chain for the product development process. Forecasters '*analysing and anticipating shifts in culture*' and fashion allows companies to position their products and '*fine tune*' their marketing efforts to take advantage of these opportunities and that members of the product development teams, merchandisers, marketers and retailers participate in events and read the trade press to gather trend information (Brannon 2011). Sometimes trend forecasting will be carried out in-house by the buying office team and / or by an independent trend forecasting agency. The trend forecasting agency's role could be to scout the market and make merchandise recommendations to the stores and chains or it could be just to focus on developing the seasonal trend forecasting reports. In the fashion environment improving the success rate of new merchandise or line extensions by a small percentage justifies the investment of time and money used for forecasting (Brannon 2011). For the trend forecasters, the process of analysing trend information appears to be down to intuition and the individual skills of the forecaster. There appears to be no recording of how decisions are made or who is involved in this decision making.

#### **2.1.4 Close relationships**

Perna (1987) stated that the trend forecaster's role is to work closely with the retailer, buyer and manufacturer when identifying style trends. For example, the buying department is broken down into divisions such as women's wear, menswear and children's wear. The buyers, internal designers, manufacturing designers and trend forecasters are the key players in each division within the company discussing trend research. Strategy meetings are held with these key players throughout the season to discuss current and future trends and key items. Brannon (2011) agreed that in companies today forecasting should be a team effort with information shared between the design, merchandising, marketing and sales teams, so that the right product is produced and distributed at the right time to the consumer. It would appear that authors do not discuss in detail what happens within the team effort, such as how they use trend forecasting information when building the ranges or who takes the lead decisions, the buyer or designer, nor whether fashion forecasting is really the driving force of the fashion business.

Tyler *et al.* (2006) suggested the need to develop strong personal and organised relationships in their supply chain in order to produce a culture characterised by common goals trust and mutual interest. From their case studies undertaken several weaknesses were found from inadequate product development, weaknesses in design, production and marketing relationships, geographical separation and lack of customer focus. Sheridan *et al.* (2006) also found from their case studies that there was a need to form close relationships in order to exploit market opportunities in an efficient and cost effective way within an area that was pivotal to the achievement of differentiation and profitability. Doyle *et al.* (2006) concurred that, the changing dynamic of fashion retailing and the desire for both low cost and flexibility has by necessity promoted a need for close relationships; this is characterised by co-operation and communication between buyers and suppliers.

## **2.2 The Fashion retail structure**

There are a number of different retail formats through which fashion is sold within the UK. Department stores such as Marks and Spencer, Debenhams, House of Fraser, John Lewis, Selfridges and British Home Stores (BHS) develop their own label ranges and dominate the UK clothing market. These stores provide a variety of price ranges concentrating on the mass to middle market price bracket. Department stores employ buyers to develop in-house ranges which may be sold under the store's own name or under another label. High street retailers usually develop garment ideas in conjunction with clothing manufacturers, liaising mostly with their designers and sales representatives. The vast majority of clothing sold in the UK is imported, though many garment suppliers have a UK based design and sales team using overseas production.

Fashion multiples can be classified into several categories such as specialist fashion multiples indicated by price levels. These are broken down into the lower mass market such as H&M, Primark and Matalan, the middle mass market, the Arcadia group, Next, River Island or the upper mass market - Coast, Hobbs and Jigsaw. Supermarkets offer value clothing which gives a high volume of sales. Discount retailers such as T.K. Maxx stock a variety of brands or end of line ranges at discount prices. Outlet stores stock a

diverse range from mass market, middle market to designer labels, prices being offered lower because they are from a previous season (Goworek 2007).

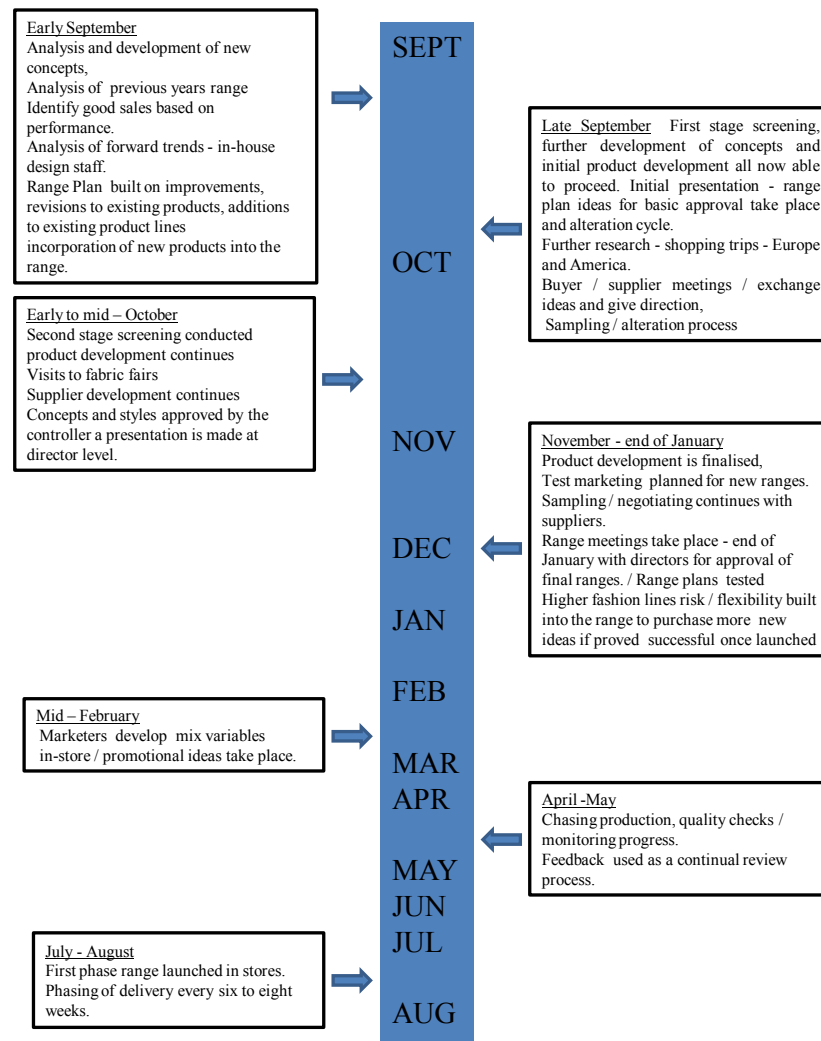
### **2.2.1 The seasonal fashion set up in the retail sector**

The advanced selling seasons weigh heavily on the textile industry; the designers, the manufacturers and the retail buyers. The entire cycle takes approximately 18-24 months from fibre to fashion or approximately one year from textile development to actual purchase, or six months from order placement by the buyer to usage by the consumer (Perna 1987).

This marketing strategy raises issues for the fashion industry such as product lead times for manufacturers, product buying cycles for retailers and trend prediction for fashion forecasting agencies. Shorter lead times and how quickly trends can be interpreted into garments and delivered to store is important. Diane and Cassidy (2005) observe conventional timescales required by industry to produce fabric and garments and sell them to retailers' means that forecasters work two years ahead. Barnes and Lea-Greenwood (2006) explain that changes in consumer lifestyles and constant demand for newness have exerted pressure on the established supply chain format. Trying to predict what consumers would buy in the next six, twelve or even eighteen months are one of the biggest challenges for the fashion retailers and manufacturers. Inaccurate predictions could potentially reduced profit or could even lead to a retailer going out of business (Gaimster 2012). The problem of trends being required more frequently has resulted in fashion personal becoming reliant on trend forecasting information for a quick response to demand from fashion retailers to satisfy their consumers. Therefore, everyone is using the same trend forecasting services, leading to a bland market with a lack of creativity and individuality on the high street (Diane and Cassidy 2005, Jones 2011).

Tyler *et al.* (2006) discussed the time consuming product development process which eventually forces the retailers into a situation where responsiveness to demand is very limited. Forecasting is the only option for decision makers as there is less potential to follow fashion trends. Decisions based on forecast demand thus become a block to

flexibility. Easey (2009) recognised that the frequency of the planning cycle in the fashion industry is due to its seasonal nature. Traditionally companies plan two seasons a year, but they are now also incorporating mid-season product ranges. The account of the retail buying sequence for staple products for the Autumn / Winter season is given as follows in Figure 2.1:-



**Figure 2.1 Seasonal retail buying sequence**

**Source: adapted from Easey (2009)**

This plan illustrates the lack of reference to trend forecasting and if or how it is used in the planning stages of the ranges. Trend forecasting is mentioned at the beginning of the range sourcing stage (early September) then refers to further research being carried out (late

September and October) to include shopping trips and trade fairs. Flexibility is made reference to when launching new ideas, if they prove successful once launched (January). Mix variables and promotional ideas are discussed (February) but no suggestion of trend forecasting. The rest of the planning stages (April to August) discuss production, monitoring progress and launch of products in stores.

### **2.2.2 The critical path**

This schedule of key dates from the buying point of view for product development and production is known as the 'critical path' because it is critical that deadlines are met if the range is to be launched on time by the intended date. These key dates for the season are planned by the buying director and the merchandising manager which are then passed down to the buying and merchandising teams in order to plan in-house meetings and visits with suppliers. The critical path is used to monitor progress on deadlines for testing and approval of fabric quality, colour, garment trims and garment fit. The buyer's aim is to have everything approved prior to the required deadline to allow for any rejections or re-submissions of fabric, trims or fitting samples. This can be a difficult path to predict as most styles have not been in production before. Product development and production run concurrently with the retailer's critical path. The buyer usually liaises with the manufacturer. The relationship between buyer and supplier is crucial to the success of the retailer and should ideally be mutually supportive (Goworek 2007).

### **2.2.3 The fast fashion set up in the retail sector**

Hines and Bruce (2007) observed that sources used by fashion designers and buyers throughout the range development process, usually pre-season which could include overseas trips, textile shows, style magazines, product shows and trend prediction agencies for inspiration for the future season. Where once buyers may have planned the product ranges for approximately four seasons in a year, now buyers for high street stores are finding they have to work on much shorter cycles. The increasing demand for fast fashion has resulted in designers using the future trends for existing collections. Traditionally

change has been in relation to the seasons but the fast fashion phenomenon has made the traditional bi-annual seasons an irrelevance for some brands as new fashion stories or mini collections are refreshed monthly.

A Mintel report cited by Hines and Bruce (2007) reported that fast fashion does not apply to the whole range in stores; approximately 80% of goods may be core ranges, with fast fashion accounting for up to 20%. A detailed account of the differences between traditional and fast fashion business model can be seen in Table 2.1 below.

Characteristics	Traditional apparel business model	Fast fashion business retailing model
Supply strategy	Efficiency-driven large volumes planned at lowest total cost.	Responsive to customer demand. Small / medium volumes in response to customer demand identified by store data.
Manufacturing operations	Outsourced globally to supplying contractors based on best price. Do not own supply chain.	Backward vertical integration enables organisations to closely manage the supply chain operations. e.g. Zara Own much of their supply chain / short lead times.
Lead times	Long lead times 12-16 weeks 6-10 wks. apparel production 2-3 wks. shipping	Short Long lead times 8-10 or 15 days including shipment.
Demand based on	Forecasts well in advance of the selling season.	Forecasts much closer to season and heavily influenced by real time demand data transmitted from stores.
Replenishment	Inventory levels trigger automatic replenishment orders from suppliers at pre-agreed contract prices.	No replenishment - when it's gone, move onto the next hot fashion.
Designs	Based on trend forecasts 8-24 mths. In advance of selling seasons.	Based on current catwalk shows. Digital photography / information transmit visual data to in-house design team to sample and cost.
Fabrics textile chain	Fabrics produced to spec by textile mills 12-16 wks. Lead times. Production booked far in advance.	Mainly standard 'greige' Fabrics piece dyed to seasonal colours in demand.

**Table 2.1 Differences between traditional and fast fashion business model**

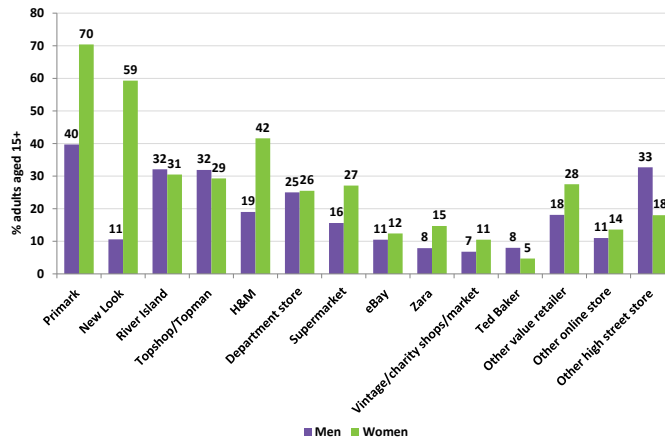
**Source: Hines and Bruce (2007:43)**

Tungate (2005) recognised that fast fashion is a marketing strategy which has taken off in the last five years and has become a strategy for increasing the market share for companies

such as Zara, H&M, and Mango, driven by the demand for trendy disposable items that can be mixed with expensive, classic pieces. Consumers do not just buy designer or chain store or vintage they have all three and throw them together in a uniquely personal style. This suggests the hypothesis again that consumers are the driving force of fashion. Hines and Bruce (2007) pointed out that the term 'fast fashion' has become a common phrase used but the concept is not new, it can be traced back through the 1970's and 1980's as quick response (QR) techniques. Fast fashion allows retailers to make up-to-date product offers to their customer base frequently. Therefore, the customers are driven to the stores more frequently to view and buy 'fast fashion' which also tends to be young fashion. Goworek (2007) referred to magazines such as Grazia, Heat and Now being responsible for promoting fashion images and stores such as Topshop and Zara making those looks more accessible to the everyday consumer very quickly. Fashion consumers now crave more products as the internet speeds up visual communication. Retailers become increasingly competitive to meet this consumer demand, therefore fashion is updated with increasing frequency.

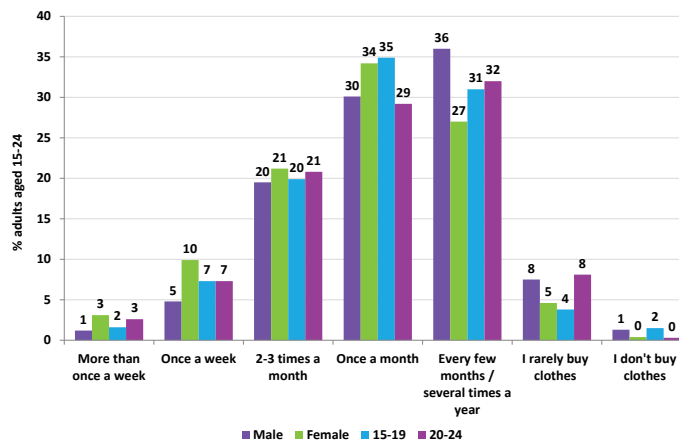
The target market for fast fashion is mainly the younger age group of 16-24 year olds, mainly women who purchase clothing often and spend more on clothes (Hines and Bruce 2007). Mintel (2011) reports on fashion as being of paramount importance for youths, with a fifth (22%) of under-25s purchasing fashion apparel as their biggest expense. Young women, teenagers and upmarket higher and intermediate managerial, administrative or professionals (Abs) are the most fashion-obsessed, being significantly more likely than average to apportion the greatest share of their budgets to buying new clothing and footwear. This age group when asked where they shopped for clothes, chose retailers such as Primark, River Island, Topshop and H&M, illustrated in Figure 2.2 below. When this age group were asked how often they shopped for clothes 34% of women and 30% of men shopped once a month on clothes and 21% of women and 20% of men shopped three times a month on clothes as in Figure 2.3 below:-





Which, if any, of the following retailers have you bought clothing from in the last 12 months?  
 The Consumer - Where Do 15-24s Shop for Clothes? Base: 960 adults aged 15-24 who buy clothes

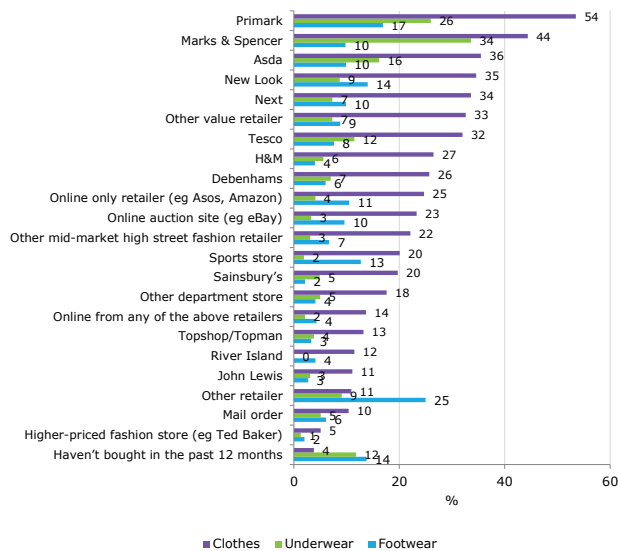
**Figure 2.2 Retailers shopped at in the last 12 months, by gender, September 2011**  
 Source: (Mintel 2011)



The Consumer – How Often Do 15-24s Buy Clothes?  
 Base: 968 adults aged 15-24

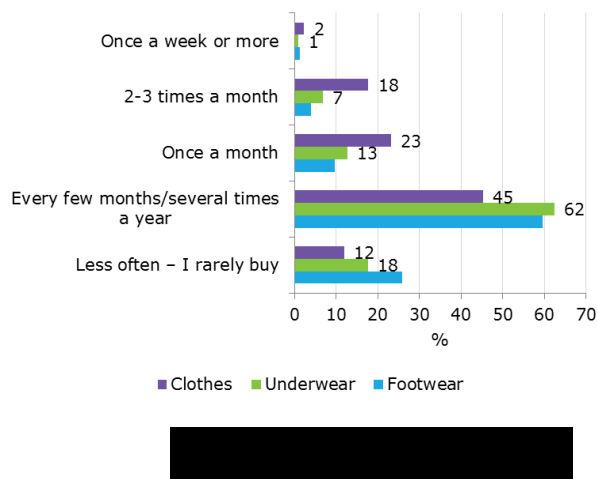
**Figure 2.3 Frequency of buying clothes, by gender, February 2011**  
 Source: (Mintel 2011)

When this age group were asked again where they shopped for clothes in 2013 the same stores were named shown in Figure 2.4 below. When asked again how often they shopped for clothes, women dropped to 21% once a month (men were not part of this survey). Both 18% of women and men shopped three times a month as shown in Figure 2.5 below (Mintel 2013).



The Consumer - Where Do Women Buy Clothes? Base: 1,000 female internet users aged 16+

**Figure 2.4 The consumer - Where do women buy clothes? January 2013**  
Source: (Mintel 2013)



**Figure 2.5 The Consumer – How Often Do Women Buy Clothes? January 2013**  
Source: (Mintel 2013)

Primark was the dominant force within the young fashion arena, with seven in ten women under the age of 25 and four in ten young men buying clothing from this retailer. Six in ten young women shop at New Look; its popularity peaks among 15-19s. Teenage ABs is the major driver of sales at this retailer, and at both River Island and Topshop, whereas H&M is most attractive to junior administrative or professionals (C1s.) shown in Figure 2.6 below (Mintel 2011).



**Figure 2.6 Retailers shopped at in the last 12 months, December 2011**  
Source: (Mintel 2011)

Customers shop more frequently for fast fashion items because they do not want to miss the latest trends. Volumes produced for fast fashion lines tend to be smaller than traditional supply quantities for non-fast fashion clothing and fast fashion lines tend not to be replenished. Smaller volumes minimise risk, it is about using stock fabric to save time, rather than specialised fabric, fast fashion is disposable, fashion for the moment and not built to last. Fast fashion concepts have been implemented successfully by a small number of retail organisations giving them perceived competitive advantage. The retailer Zara is viewed as an important example of a fast fashion retailer, with rapid stock turnaround and vertical integration creating greater control over product lifecycles. Dutta (2002) illustrate Zara's business model in Figure 2.7 below.

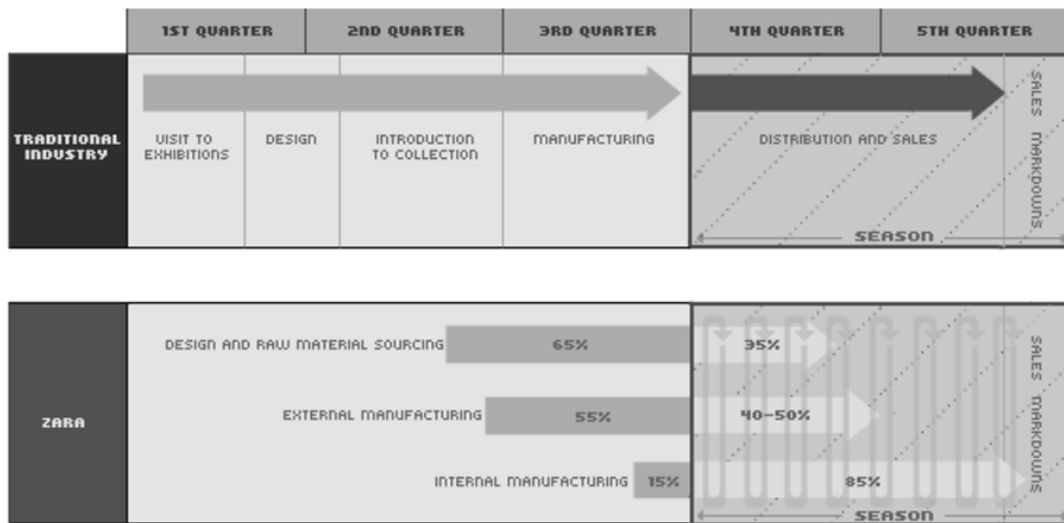


**Figure 2.7 Zara supply model**

**Source: Dutta (2002)**

This model illustrated four key interactive stages of product development starting with the garment creation through to the garments in store. Waddell (2004) acknowledges those companies such as Zara, H&M and Next shorten the product life cycle using just-in-time systems or other electronically aided methods. Hines and Bruce (2007) agreed that fashion cycles are becoming shorter, transport and delivery is more efficient and the merchandise is delivered that is ready for retail sales. Ghemawat and Nueno (2003) described traditional fashion retailers producing new designs six months ahead of the season, whereas Zara produce new designs in between four and five weeks ahead of requirement. This is achieved by 85% of their designs being produced in-house during the season, compared to the traditional retailers producing only of 20% during the season. Zara is compared with the traditional retailers fashion cycle in Table 2.2 below.

**Exhibit 13** Product Precommitments: Zara vs. Traditional Industry



Source: Inditex.

**Table 2.2 Zara vs. traditional industry**

**Source: Inditex (2003)**

For fashion cycles to be implemented the distance is the key factor; goods from China take around 22 days by ship, compared to approximately five days from Turkey (The Financial Times, 2005). Therefore, companies such as Tesco, New Look and Primark look to source fast fashion items which need to be responsive to market demand from countries that are closer to the UK. There has also been a return to some UK manufacturing, the fast fashion manufacturer Basic Thinking, has opened a newly built factory in Leicester. They manufacture clothing for retailers including George at Asda, Arcadia, Matalan and Primark. This new factory enables them to produce 'Basic Premier' items in the UK which had previously been produced in Egypt. This move to British manufacturing was due to the rising demand for products to be ethically made and that the 'Made in Britain' tagline resonated well with British shoppers (Mintel 2013).

## 2.2.4 The effects of fast fashion on the trend forecasting agencies

The effect of fast fashion on the trend forecasting agencies has been due to the scope of the products that are now seen as fashion items and the range of companies with which the trend forecasters are having to work with. The products range from mobile phones to chocolates, beauty products, paints and car interiors. Trend agencies sell their services to car manufacturers, financial institutions, mobile phone brands and pharmaceutical companies as well as a broad range of fashion brands and retailers (Gaimster 2012).

Promostyl, personnel interviewed during 2007 confirmed that the impact of fast fashion on fashion trend agencies meant they were eager to find a strategy to react to fast fashion and responding by expanding into market segments other than fashion such as the magazine, hotel, car, paint and cosmetic industries. They were also updating their online site more often with high priority fabrics and products to target a wider market. Promostyl were looking at working with smaller companies in the niche markets, where they could build good working relationships and would appreciate a more personal approach. Valos *et al.* (2010) discussed that the future developments in online marketing suggest that the advertising industry would become more specialised as media channels became more diversified and markets and target audiences become more niche.

This suggested that trend agencies like Promostyl were changing in the right direction by implementing their strategy to diversify in 2007, but their reaction was not evolving fast enough and had been left too late to deal with the impact of fast fashion. Jackson and Shaw (2009) had pointed out that trend forecasting agencies such as Promostyl would have to become multi-functional back in 2001 and with the opening up of global markets they could not become complacent. The accessibility of media had provided consumers with more fashion, sport, film and music influences from around the world. Consumers consequently had a broader and more sophisticated appreciation of popular cultures and this raised awareness has created a demand for particular products and fashions (Jackson and Shaw 2009).

Tungate (2005) observed that with fashion in a constant flux, there was a strong argument for trend forecasting agencies to be producing a trend book that could be adopted not only

for every season but for every day. The online trend forecasting agency WGSN provided this service and has dramatically changed the way trends are monitored. They deliver daily fashion business news, interviews, cover trade shows and runway shows from around the globe. McKelvey and Munslow (2008) recognised that the advent of the worldwide web has revolutionised the industry and enabled new online companies to publish forecasting material that reported on global trends in a fast and distinctive manner. This required intelligence gatherers to be based in key cities across the world, collating and disseminating the new findings. This suggested the hypothesis that consumers are the driving force of fashion rather than the retailers and raises the research question, who uses trend forecasting? In the light of short-term fashion cycles, trend forecasting agencies have to reinvent themselves and ask what significant changes need to be brought in to keep up with fast fashion.

In the researcher's experience keeping up the pace for fashion trend awareness via online trend forecasting agencies is not a straightforward task for fashion personnel. There are too many trends to absorb and interpret even before considering the risk factor of following a trend that does not lead to retail success. Hodges and Damhorst (2008) conducted research into how technology could be used to develop products involving the consumer's views, proposing in the future designers accept consumer engagement at the design stages of the process.

### **2.2.5 How fashion cycles are challenged by fast fashion**

Within the fast fashion environment traditional approaches to sourcing and buying of the fashion cycle are challenged (Fraser *et al.* 2010). Tucker and Jones (2002) question within fast fashion, whether long established suppliers are able to provide a time-compressed service economically. Suppliers are investing in design capabilities while buyers have to switch to local suppliers for rapid innovation in the market which may involve buying weekly. Flexibility is critical in fast fashion to ensure rapid replenishment (Bruce and Daly 2006).

Hayes and Jones (2006) state the retailer most renowned for a fast fashion strategy is Zara and case studies show on a lead time of 15 days or less. Saini and Ryle, (2005) and Carruthers (2003) and Ferdows *et al.* (2004) confirmed case studies on the retailers Mango and H&M had reduced their minimum lead times down to approximately three weeks. White (2004) found that Zara entered the UK and began directly competing with Topshop, who had decreased their lead times from approximately nine weeks to six weeks. Waddell (2004) recognised that a garment image e-mailed from London to Hong Kong could reduce the manufacturing time by days or weeks. Generally, however the fashion industry is still operating on a two year cycle. According to Goworek (2007) the fashion industry traditionally splits the year into two main seasons Spring / Summer (February-July) and Autumn / Winter (August-January) but the competitive nature of the fashion business requires more frequent changes up to at least every three months. Easey (2009) similarly describes mid-season ranges and top up lines as well. Goworek (2007) advocates this rapid response innovation is driven by strong marketing strategies for success by retailers aiming at the more fashion conscious younger end of the market. The whole buying cycle is much shorter in order to respond to trends more rapidly and there is no time to get it wrong! Fast fashion is a business strategy which aims to reduce the processes involved in the buying cycle and lead times for getting new fashion product into stores, in order to satisfy consumer demand at its peak (Barnes and Lea-Greenwood 2006).

Fast fashion is unpredictable, buying teams are finding the drawback of quick response to be the timing of a trend, by the time the company has set up the auditing etc., the trend has been and gone. The need for quick response to new trends has led to the buying team being required to be prepared in advance. In order to achieve this they are constantly working towards it, by having fabric booked in grey state and then styling it as required. This means planning, timing and the supply base have to be in order. There is a need to investigate what percentage of garments can be produced to this format and what mechanisms are in place to deal with this situation. Finding suitable countries to fit in with the required response, production and delivery time could be problematic. How often do buying meetings have to take place to keep up with demand? Is this still done seasonally? If so, this suggests drop-in orders are executed as a last minute quick reaction to fast fashion.



## 2.2.6 Fast fashion system and its demands

The timescale involved for producing garments is a significant factor in Zara's production process. The main focus is placed on reducing the gap between the garment being designed and its availability for purchase (Mazaira *et.al* 2003). The volumes for each line of fast fashion produced tend to be smaller than the traditional supply quantities for low fashion content clothing and unlike many traditional lines which were continually replenished from stock within season, fast fashion lines tend not to be replenished. Smaller volumes also minimise risks of obsolescence for retailers and reduce fashion risk (Hines and Bruce 2007). The priority for quick response was about replenishment. Fast fashion is about consumer demand representing a move away from supply chains driven by the brand owner and designer "push" to demand chains driven by consumer "pull" (Doyle *et al.*, 2006, Sull and Turconi, 2008).

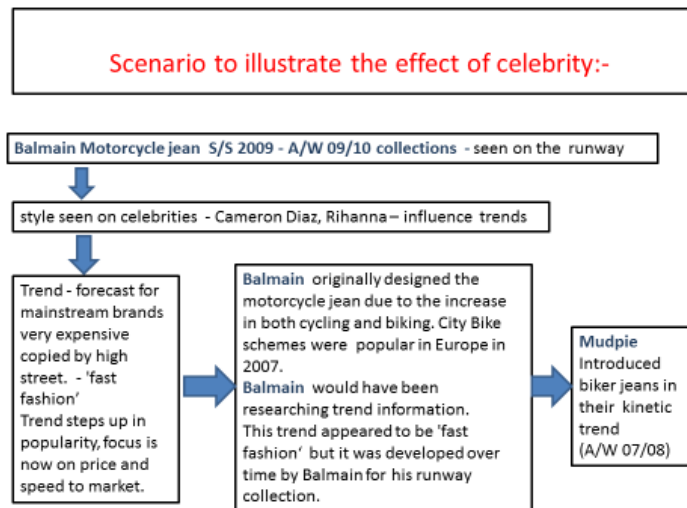
Fast fashion needs a highly efficient production process to enable the retention to maintain low prices and continually renew the selection of garments available in the stores (Gabrielli *et al.* 2013). It also needs a radical change in new product development (NPD) processes, so that perceived demand can be transformed into sample garments in a very short time. Zara is able to meet quick response to fashion trends because it has a small design team and a close-knit manufacturing system. New styles are picked up and rapidly translated into new garments to reach the stores soon after they have been identified (Arnold 2009). Therefore, the fast fashion model offers the consumer a wide range of styles at a low cost, which is reassuring when purchase mistakes are made because it has only involved a small economic and psychological investment (Bhardwaj and Fairhurst 2010).

Supermarkets selling clothing have increased the competition and re-educated consumers, who now buy cheap fashionable clothing along with their weekly shopping. The fast fashion concept allows retailers to make up-to-date product offers to their customer base more frequently. Therefore, customers are motivated to visit the stores more frequently to view and buy 'fast fashion' because they do not want to miss out on the latest trend (Hines and Bruce 2007, Byun and Sternquist 2011). Fast fashion does not apply to the whole of the garment range produced by the retailers, it accounts for approximately 20% (Bruce and

Daly 2006). In the researcher's experience, garment ranges and colour are less important, styles that sell are the key to fast fashion.

### **2.2.7 The effect of celebrity influence**

Jackson and Shaw (2009) observed that the cult of celebrity is an increasingly important part of everyday British life. The benefit of celebrity association is being used by fashion brands for example David Beckham for Police sunglasses, Brian Ferry and Twiggy for M&S. The consumer is more interested in celebrities and their social importance which has resulted in their dress style and fashion sense being observed and analysed. Furthermore, the celebrity magazines such as heat, Hello and OK feature a wide range of celebrity lifestyles and the increasing circulation of these magazines is having an increased influence on UK fashion. Frings (2002) pointed out that celebrities such as Gwyneth Pétrow and Kristin Scott Thomas are popular models who shape company images on the basis of their appeal to the target customer. Designers also give clothes to celebrities to wear at the Academy Awards to be photographed for publicity purposes. Brannon (2011) suggested celebrities function as role models and offer '*ego ideals*' to the consumer on two levels, as themselves in interviews and as the fictional roles they play. For innovations in which celebrity leadership is a factor, the forecaster can map celebrity influence to the consumer segment most likely to be influenced. This is illustrated in Figure 2.8 below. The visibility and desirability of the celebrity image may be a determining factor in the diffusion of some innovations.



**Figure 2.8 The influence of celebrity**

**Source: An extract drawn from an interviewee from Mudpie (2010)**

Brannon (2011) proposed that the forecaster may watch for fashion leadership in a particular market sector and predict the potential diffusion of innovation within this sector and for use in other sectors. A forecaster may also monitor the retailers and estimate a path of innovation from forward-thinking retailers to more mainstream or mass market clients. For example, Participant 4 discussed the Balmain’s motor cycle jean in 2010 as an example of ‘celebrity’ fashion, but it is also a good example for diffusion of innovation. Balmain’s motorcycle jean from the Autumn / Winter 09/10 collection illustrates innovation from couture to the high street. This ‘biker’ jean was first seen on the catwalk and then worn by celebrities, Cameron Diaz and Rihanna. This ‘biker’ trend was then copied by the high street because of the growth interest in cycling, biking and the trend for city bike schemes.

### **2.2.8 Fast fashion and seasonal fashion retailers**

Fast fashion has been acknowledged in the fashion press and within the industry as being a key strategy for success for modern fashion retailers such as Zara, Topshop, H&M, and New Look. They have a strategy of constantly renewing their product ranges with fashion-led styles to attract media attention and entice the consumer to visit their stores frequently

(Barnes and Lea-Greenwood 2006). Zara and Topshop are turning today's 'red carpet outfit' into tomorrow's 'mass must-have' item, which has made them industry leaders rather than followers (Newsweek 2005). Hayes and Jones (2006) stated that sales from fast fashion stores have risen by 31% since 2001, compared with the women's wear industry average of just 1%. Murphy (2005) stated more conventional retailers such as Mark & Spencer have lost valuable market share. Saini and Ryle (2005) and Murphy (2005) observed that not all retailers who do not follow a fast fashion strategy are unsuccessful. The majority of clothing sold is not fast fashion. The entrance of supermarkets into the clothing market has increased competition and redefined how customers shop for clothing, customers can buy cheap fashion as part of their weekly shop, rather than visiting the high street (Hines and Bruce 2007).

Volatility, reinvention and fundamental changes in the markets pose unprecedented challenges for researchers and industry. Traditional conceptual models and theories fail to provide adequate insight for coping with this new and rapidly changing business environment (Cravens *et al.* 2009). Therefore, the processes for analysing and interpreting the impact of the changing market needs to be critically examined and reworked for this changing market. The rise of fast fashion provides the opportunity to identify a taxonomy of models with a shortened time frame. The research will link process and practise for industry to create new knowledge for the product development process.

### **2.2.9 Distinguishing the differences between seasonal fashion and fast fashion**

There is a need to distinguish the differences between seasonal fashion and fast fashion in order to understand how the product development process is conducted by the seasonal and fast fashion retailers. The term 'season' refers to a period of time during which fashion products are sold. The precise sales window associated with a season will vary in accordance with the nature of the fashion business. For example, a fabric manufacturer will sell fabric for production of Spring / Summer (SS) merchandise typically one year before the SS retailing season begins (Hines and Bruce 2007). There are two traditional fashion seasons where new ranges are launched, these being Autumn / Winter and Spring /

Summer. The retail buyers develop several garment ranges that are launched at various times during the season as appropriate for the climatic conditions and changes in fashion trends (Goworek 2007). In the context of this research, seasonal fashion refers to garments designed within a buying cycle:

*‘The traditional fashion buying cycle starts 12 months before the season, with leads for orders being placed 6 months prior to the product launch’.*

(Birtwistle *et al.* 2003)

The buying cycle is organised around the established sequence of trade and fashion shows that are planned around the Autumn / Winter and Spring / Summer seasons. These trade ‘shows’ cover yarn, colour, fabric and style trends. The trends which originate from these shows contribute to the ‘look’ of a fashion season (Jackson and Shaw 2009). Over time the number of seasons has increased from four to six or more. This change created a desire for newness among the designers, press and consumers. The consumers expect that a change in season requires the purchase of new clothes in the latest colours, styles and detailing (Brannon 2011). As consumer lifestyles have become more complex and time consuming, fashion brands have responded by offering greater choice and changing ranges more frequently (Hines and Bruce 2007).

Some UK fashion retailers introduce ‘transitional’ ranges, small ranges that are introduced in-between seasons into stores at least once a month and some trend-led stores once a week. This does not mean completely changing the range, but introducing new items, while retaining the core lines in store. These mini-ranges or ‘phases’ require QR supply chains and short production lead times, which is problematic for the seasonal retailers. For example, a problem maybe of a gap between fabric delivery and commencement of bulk production resulting in late orders (Goworek 2010).

The term ‘fast fashion’ has emerged over recent years in Europe and particularly in the UK to a specific kind of fashion business. It is characterised by a quick turnaround of fashion products, which reflect fast-changing fashion styles (Jackson and Shaw 2009). In the context of this research, fast fashion refers to garments that comply with the following definitions below:

*'Fast fashion a concept which reduces product lead times in order to get merchandise into store in order to meet consumer demand for trend led fashion in prime time.'*

(Hines and Bruce 2007:58).

*'Fast fashion is a business strategy which aims to reduce the processes involved in the buying cycle and lead times for getting new fashion product into stores, in order to satisfy consumer demand at its peak'.*

(Barnes and Lea-Greenwood 2006:259)

Fast fashion has been implemented successfully by a small number of retail businesses which has given them a competitive edge. Zara, Topshop and H&M have been credited with the concept of fast fashion, described as the ability to take an idea seen on the catwalk and interpreting the look for their own stores in timescales of two to six weeks. These garments may not have the same quality and fit of a designer garment but the price is affordable for the targeted consumer. Frequently customers who buy this type of merchandise do not expect it to last for more than one season.

*'Fast fashion is disposable. It is for immediate consumption. It is to capture the look of the moment. It is not to linger in the wardrobe. It is definitely not durable. It is not built to last.'*

(Hines and Bruce, 2007:44)

Currently fast fashion is not clearly defined by the literature; it is described as, a marketing concept or business strategy of designing and making to demand by Hines and Bruce (2007), Easey (2009) and Barnes and Lea-Greenwood (2006). Therefore, fast fashion is not accurately illustrated in a practical way. There are discrepancies demonstrated by Jackson and Shaw (2009), Hines and Bruce (2007) and Barnes and Lea-Greenwood (2006) as to what people are saying regarding fast fashion. Typical statements are that fast fashion is flexible, that it reduces product lead times, that garments produced for fast fashion are of lower quality than regular lines because they are not meant to last and garments are affordable for the targeted young consumer. The literature is not capturing the experience in industry.

This study will clarify what companies are actually doing when presenting a fast fashion offering. The only retailer to pursue fast fashion practice is Zara and not all companies follow the Zara model. Practice in my experience is not designing and making to demand as Zara do, but utilises ‘open to buy’ options at a late stage in the season. Suppliers are providing more choice of garments that are still anticipating demand, therefore, still forecasting. Trend forecasting should be pivotal when planning fast fashion to make trend forecasting worthwhile. The suppliers are on the ‘back foot’ in trying to give the consumer what they desire. The position taken when defining fast fashion in this research will be in the reflection of the proposed fast fashion model which characterises fast fashion by proposing to capture ‘real time’ demand.

The seasonal process in current literature shows only the buyer’s perspective. The seasonal model proposed in this research will be from a practical viewpoint and incorporate the importance of the designer’s role in the product development process. The stages where trend forecasting is used in product development will be incorporated into the models. The ‘open to buy’ process, which is a mechanism for dealing with close to season fashion within traditional seasonal fashion will also be shown within the seasonal timeline. These findings incorporate aim 3 which is to design and evaluate a taxonomy of models relating theory and practice of new product development and trend forecasting. This will fill the need for further research work in this area.

### **2.3 The forecaster’s role in identifying fashion trends in the market sector**

Granger (2012) noted that there are four types of forecaster:

- Forecasters working on raw materials (fibres and fabric houses such as Cotton Incorporated).
- Forecasters working on colour trends developing colour palettes for clients (e.g. Colour Association).
- Forecasters working on population trends, social, economic, geographic and technological changes in the world.

- Forecasters working for trend forecasting agencies representing a wide range of target markets and products (e.g. Promostyl).

Gaimster (2012) recognised that it was not unusual for an individual to undertake more than one role so a forecaster may also be a journalist, or a designer may double as an illustrator. This flexibility meant that the forecaster is able to apply multiple perspectives to their knowledge of the industry.

Sources of information that forecasters use depends on the market sector in which they specialise, for example colour, demographics, apparel or home. This can then be further divided into consumer segments women, men's or pre-teens. Market research firms analyse demographic data, fashion forecasters observe the couture collections or seek new talent from prestigious fashion schools and visit trade shows for colour and textile trends around the world. They network with designers, buyers and manufacturers, consult e-sources, for example online music programs, chat rooms and news sites. Other sources include:-

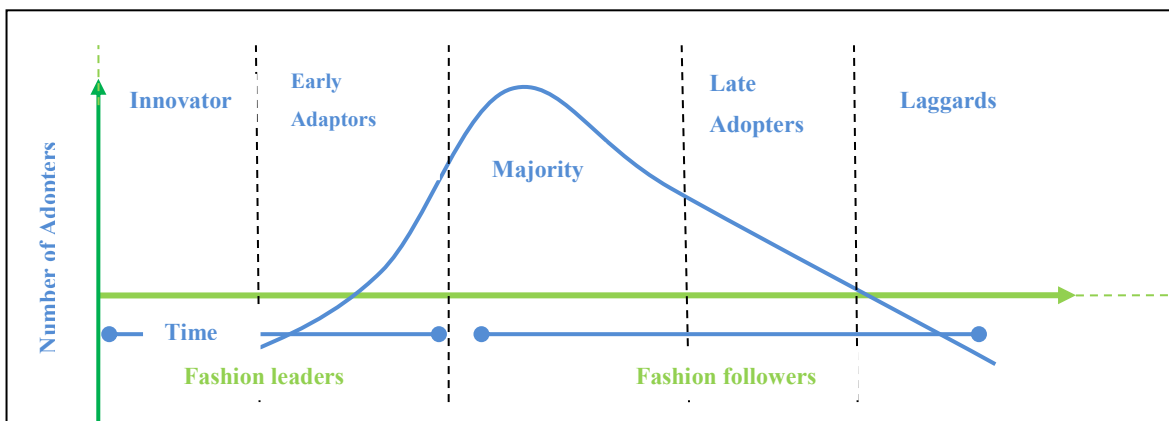
- Design sources, vintage clothing shops, antique dealers, museums, music concerts;
- Travel vacation hotspots, such as Japan for street fashion and Belgium for deconstruction techniques;
- Psychographics, people's lifestyles and behaviour, where they like to vacation, interests they have, how they behave;
- Sports lifestyle, a particular sport or activity modified for street wear, for example high top boxing boots or surfer shorts, yoga pants or golf top, which illustrate the influence of sports trends (Granger 2012).

Fashion forecasters continually monitor, listen and observe consumers (Granger 2012). The forecaster's understanding of aesthetics, manufacturing and the wear-ability from the consumer's point of view leads to an actionable forecast and because the market place is in a constant state of evolution, the initial stages for the next innovation or trend is emerging Brannon (2011).



### 2.3.1 The product life cycles

Brannon (2011) described something new and an ‘*innovation*’ is proposed. It may appear in a hit film, TV show, music video and influence the buying decision of millions or it may emerge from the catwalk as in a retro revival or a modern look. After the innovation arrives on the scene, consumers consider it for adoption. The cumulative effect of those decisions can be tracked in sales and visually on the street. Sometimes innovation redefines what is appropriate as in the case of wearing lingerie as outerwear. At first the idea of uncovering bras and corsets was unacceptable. Then it became daring as rock music divas took on the look. Finally the style was modified by many retailers. The lingerie look became acceptable as part of the power suit which was worn with lace edged camisoles. This innovation diffuses through the population, and consumers either reject or accept it. This diffusion process maps the response to the innovation over time. Rogers (1971) described the diffusion of innovation as a bell shaped curve where the left-hand side represents early adopters and early diffusion of innovation, the centre section, represents majority adoption and the right hand side the laggards, illustrated in Figure 2.9 below.



**Figure 2.9 Adopter categorisation on the basis of innovativeness**

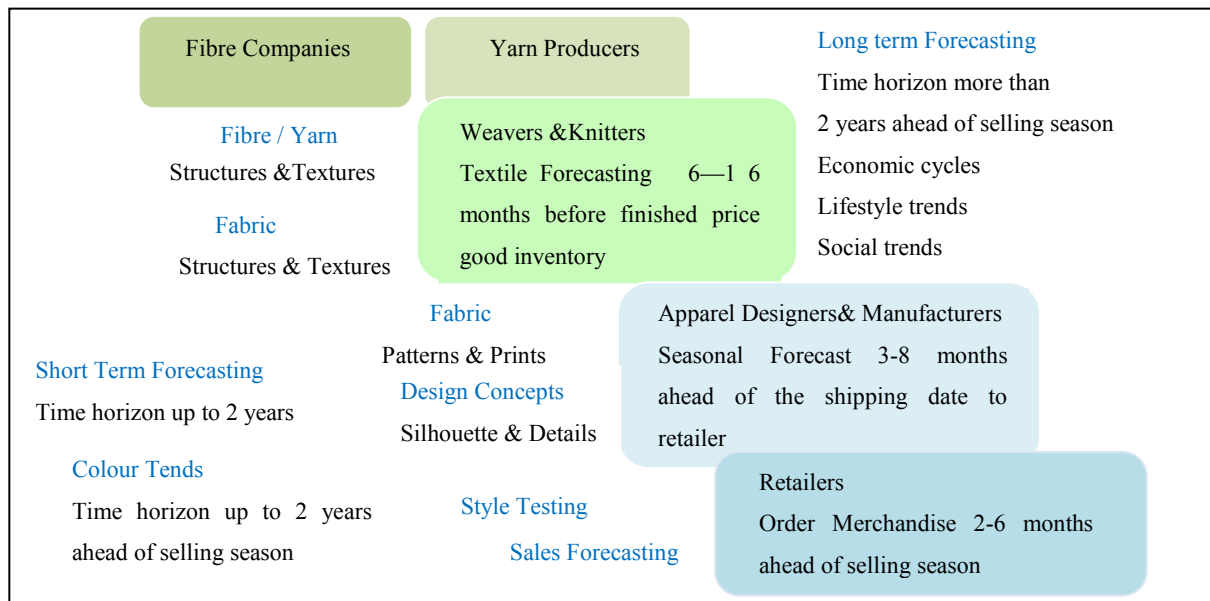
**Source: Rogers (1971:182)**

For the forecaster, the diffusion model provides a framework for analysing the movement of an innovation through a social system. The framework helps to answer questions about why do some innovations move more rapidly than others? What mental process is used by the consumers to decide in adopting or not an innovation and what kind of consumer participates in each stage? Brannon (2011) described fashion cycles as waves striking a

beach. Long before one wave has finished its course, new ones are being formed far out in the ocean. What is the underlying contour of the bottom and how does that influence change the shape and speed of the waves? When will the waves arrive and with what force? How far can the forecaster see? If a forecaster can estimate these factors, then that gives the designer, manufacturer or retailer a chance to capitalise on the change.

Brannon (2011) outlined the forecast as being developed by the sales and merchandising managers using input from retailers, marketing representatives, sales history analysis and market research. This long term forecast mirrors the manufacturer's business expectations in terms of lines and styles to be produced each month. The short-term forecast includes both basic and fashion goods detailed down to weekly production by style, colour and size. Effective forecasting assures the timely delivery of merchandise to the retailer. Tracing and planning the process backward, forecasts and orders feed back to the textile manufacturer. A process similar to the one in apparel manufacturing occurs at the textile manufacturing level. The time period from initial forecast to the delivery of finished piece goods to the apparel manufacturer is between 6-16 months. Tracing the process back one step again leads to the yarn and fibre manufacturers, where a similar forecasting process takes place.

Industry fashion trends enter the model illustrated in Figure 2.10 below, as input for the retailers' decisions and as part of the planning at the other stages of apparel, textile, yarn and fibre manufacturing. Colour forecasting is done 20-24 months ahead of the target selling season. Textile development is done 12-24 months prior to the target selling season. International fabric fairs show new trends one year ahead of the target selling season. All these forecasting activities are aimed at having the right products at the right time to meet consumer demand.



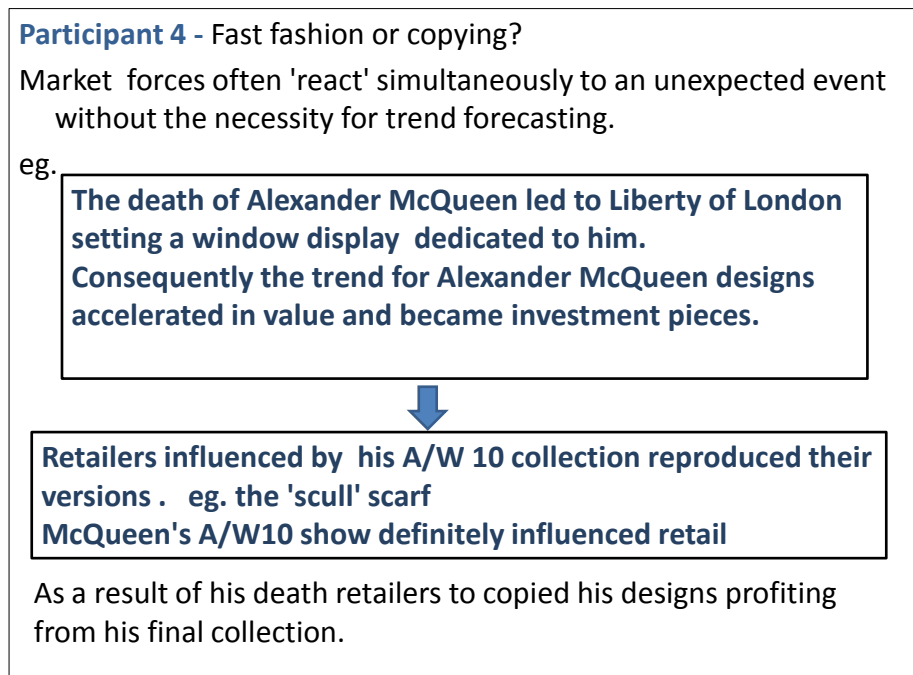
**Figure 2.10 Short and long term forecasting**

**Source: Brannon (2011:31)**

Hayes and Jones (2006), when describing fashion garment categories, referred to Abernathy *et al.* (1999), who split garments into three categories: Fashion, fashion basic and basic. They defined fashion items as those garments with a lifecycle of one season, fashion basic garments are those that are a fashionable variation of a basic, and basic as those garments which remain in a collection for several years. e.g. a white t-shirt or classic black trousers. It should be noted that in a fast fashion retailer's product portfolio, there are likely to be a proportion of basic items as well as fashion items. Brannon (2011) observed that fashion is a mass of '*intricately interlocking subsystems*', on a critical edge. Such a system is always '*poised on the edge of change*'. Competing on the edge means creating a relentless flow of innovations. The future is about being able to accept constant change, where strategies emerge through anticipation and improvisation. Birtwistle *et al.* (2003) observed that quick response is not just about products moving from the design stage to the stores, it is about being keenly responsive to customer needs. This is where Zara is leaping ahead of the competition in satisfying consumer desire for fashion on a timely basis every day.

Fashion can be affected by unpredictable events such as described in Figure 2.11 below, where the unexpected death of Alexander McQueen accelerated the trend for his famous 'skull' scarves which were then copied by retailers profiting on his final collection. This

trend came about because Liberty of London created a window display of his skull scarves in his memory. The market reacts simultaneously to an unexpected event without the need for trend forecasting.

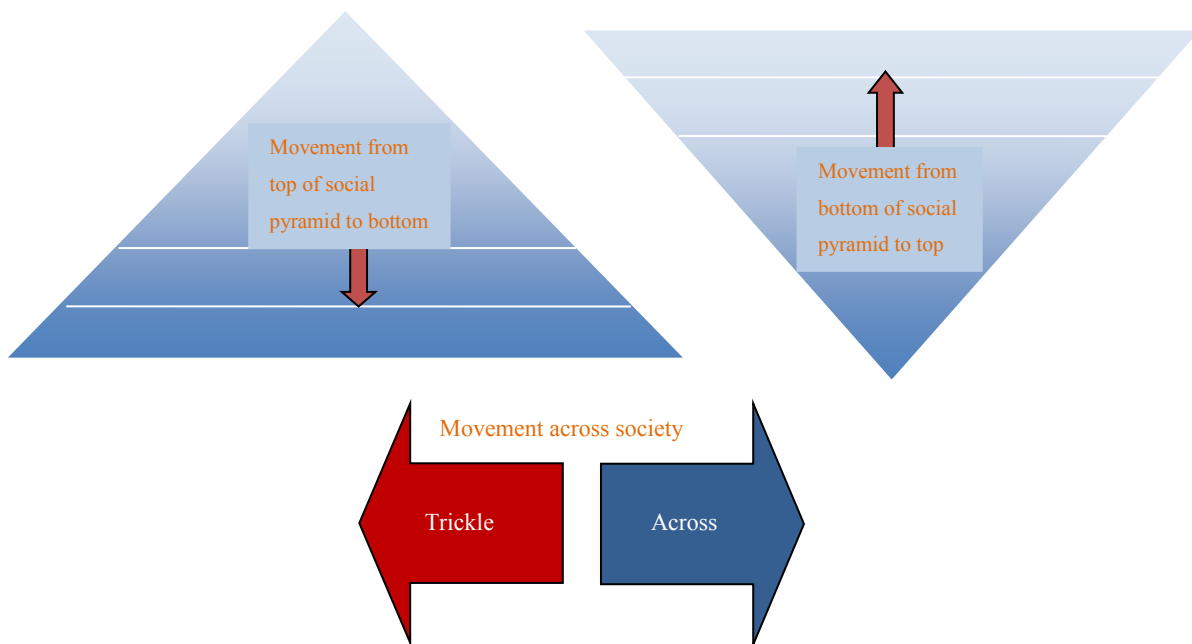


**Figure 2.11 An unprecedented event**

**Source: An extract drawn from an interviewee from Mudpie (2010)**

### **2.3.2 Fashion theories**

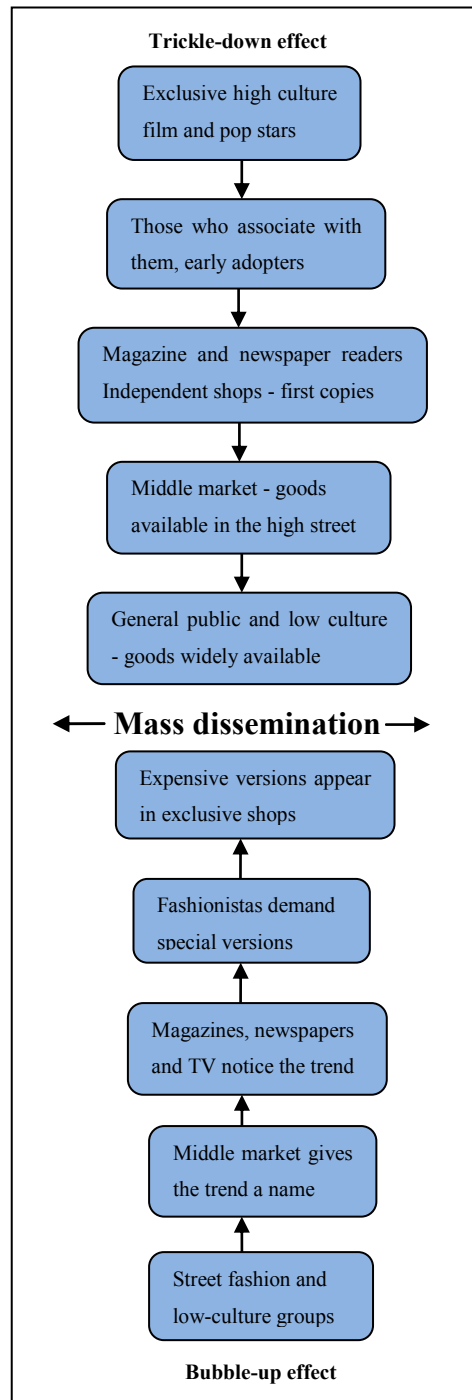
Rousso (2012) put forward the notion that theories of fashion movement could be broken down or explained as the trickle down, trickle across or trickle up theory, illustrated in Figure 2.12 below. In the trickle-down theory those at the tip of the social pyramid dictate fashion, which is then copied by the people in the lower social levels. People of wealth and prominence adopt style; the people in the lower classes duplicate the look, those in the top classes move on to new styles to maintain social position and power. The trickle across theory moves within groups of similar social levels, it is associated with the middle classes and mass production, the pace of adoption is rapid, and changes quickly onto the next thing, an example being fast fashion.



**Figure 2.12 The three theories of fashion movement**

**Source: Rousso (2012:105)**

The trickle-up theory begins with the young members of society in the lower income groups. The younger generation rebel against the social norms and develop their own looks. It is important for the forecaster, designer, manufacturer or retailer to recognise this theory. Fashion in the twenty-first century has less association with what the rich and famous are wearing (trickle-down theory) or with catwalk styles and copies, as it had in the twentieth century. Dynamic culture shifts are more likely to indicate consumer needs. The earning power of women and the social behaviour of teenagers wearing street style such as hip-hop have been key drivers of change (bubble-up theory). This theory is illustrated by Jones (2011) in Figure 2.13 below. The consumer is more knowledgeable and creative regarding dress and makes the decision as to what is fashionable for the times.

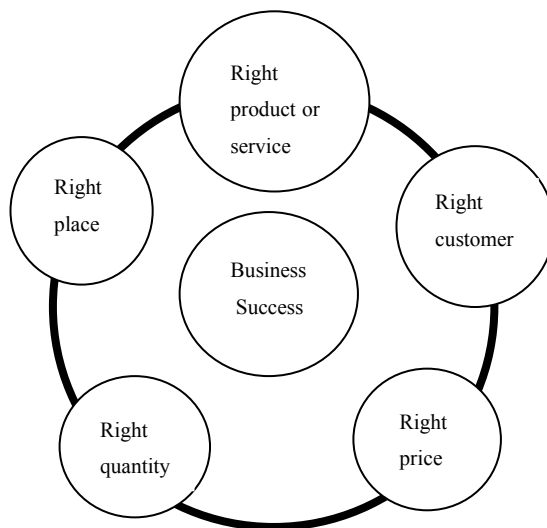


**Figure 2.13 Trickle-down and bubble-up theory**

**Source: Jones (2011:62)**

## 2.4 The fashion trend report

Birtwistle *et al.* (2003) stated that the fashion world works around a fixed calendar of yarn and fabric exhibitions, fashion shows and trade fairs and the retailer's own timetable of selecting ranges. These forecasts co-ordinate the supply chain in the product development process. The retail buyers and merchandisers will be working simultaneously with in-house teams of designers, quality controllers and garment technologists during the product development process (Easey 2009). A successful fashion business depends on knowing and understanding the consumer, fashion companies being able to deliver the right product into the market place at the right time, in the right quantities at the right price for the right consumer. For a business to be successful all five elements must come together as illustrated in Figure 2.14 (Rouso 2012).



**Figure 2.14 The secret to a successful fashion business is to have the five R's. Right product, right customer, right price, right quantity and right place.**

**Source: Rouso (2012:10)**

## 2.5 The fashion industry dynamics

The fashion industry structure is described by Perna (1987) as being broken down into three sectors: the primary market, the secondary market and the tertiary market. The

product development process begins in the primary market with the processing of raw materials into yarns, fabrics and components by the fibre and fabric manufacturers. In many cases, retailers rely on the garment manufacturers to provide suitable fabrics. Larger retailers source their own fabrics. The secondary market refers to the garment manufacturers who sit between the textile manufacturers and the retailers. Garment manufacturers select fabrics for new trends and garment shapes. The original design manufacturer's (ODM) and original brand manufacturers (OBM) expertise when designing their garment ranges comes from a culmination of information collected from their background research on social and cultural data and design inspiration. Sales information from the retail buying departments and fabric trends information from fabric suppliers is also taken into consideration. The tertiary market is the retail sector, where the fashion director has the responsibility for the trend direction for the forthcoming season along with the merchandising team.

Easey (2009) categorised the fashion industry structure in the same format as Perna (1987) but goes on to discuss the chain process of converting raw materials into finished goods and describes the teams of people working together on each level of the primary, secondary and tertiary sectors. In the primary sector, yarn and textile producers employ an array of people such as designers, technologists, colour consultants and fabric forecasters. At the secondary level, teams of in-house designers, pattern cutters, sample machinists, production and sales people working in the manufacturing sector develop the garment ranges. In the tertiary sector, designers and merchandisers in retail organisations work on developing their ranges. They in turn will be working with in-house designers, quality controllers and garment technicians. The retailers also work with the yarn and textile producers in order to obtain fabric dyed to retail specifications and order for the garment manufacturers.

Hines and Bruce (2007) described 'globalisation' as representing the ways in which markets have converged throughout the world and the ways production has shifted geographically to satisfy global consumers. Prior to globalisation in the 1960's the textile and apparel industries in most industrialised countries felt the impact of increased imports from the low wage developing countries affecting their domestic markets. The imbalance of exports with the influx of imports accelerated the problems of unemployment and



decline for the industries and recession periods followed in the 1970's, 1980's and the early 1990's. The downsizing of companies to make them more profitable and the total quality management (TQM) approach, emphasising team work towards common goals and process improvement, along with quick response (QR) had evolved to improve production and shorten production time (Dickerson 1999). The UK however had lost their competitiveness in the textiles business because they lost track of textile technology development and companies failed to increase their productivity. In 1990 apparel manufacturers moved to global sourcing, aiming for lower prices, which they could realize by producing in developing countries (Tobler-Rohr 2011).

Hines and Bruce (2007) explained that now large retail organisations have control over garment suppliers because the retailers have control over the channels to market. Therefore the producers needed to establish their roots to market through building relationships with the retailers. Suppliers now have to comply with retailer demands for delivery schedules and quality. Therefore, garment suppliers have become reliant on the repeat of retailers contracts and the retailers gain greater flexibility to switch suppliers as they see necessary.

### **2.5.1 How trend forecasting fits into product development**

Each market sector attends trade shows, where all those involved in the forecasting process evaluate information. The word 'show' here is given its widest interpretation to refer to the range of organised textile and fashion garment trade shows taking place fifteen months prior to any season. The different needs arising from the fashion clothing supply chain have resulted in a sequence of yarn, fabric and product trade shows and round the world fashion shows, for the ready-to-wear (RTW) industry evolving over the years (Hines and Bruce 2007). These trade shows are held in major cities throughout the world at carefully selected scheduled times throughout the year. Keiser and Garner (2007) defined these trade shows as the foundation of the textile and apparel sales calendar.

The kind of visitors that attend these shows depends on the nature of the show. A yarn show will attract a range of people, including fabric manufacturers, some retail buyers and designers, although it will be mainly people who are involved in fabric production. The

textile shows mainly focus on the sale of fabrics, which attracts retail designers and buyers, because it is relevant to garment design. Bye (2010) noted textile trade shows are important destinations for fashion designers so they can select the season's fabrics from a variety of vendors. *Première Vision (PV)*, a show for the fabric manufacturers to exhibit their current and new fabric ranges, has become well known as the 'colour filter' for the industry because this exhibition compiles its own colour prediction package which all exhibitors adhere to, setting a consensual theme of colour for the fashion industry. Buyers pick up on this theme of continuity of colour and read it as the trend colours (Diane and Cassidy 2005). Garment shows range from product trade shows through to high profile RTW designer shows like London Fashion week and then there are the Paris based Couture shows, which attract a more diverse range of visitors and are not directly relevant to all fashion brand designers and buyers (Hines and Bruce 2007).

Trend forecasting agencies exhibit at these trade shows holding seminars for promoting and presenting their seasonal predictions to product developers. Eundeok *et al.* (2011) stated that various professionals in the fashion industry such as executives and managers from retail buying use the fashion trend forecasting information to establish long term marketing strategies, while designers and merchandisers use it to develop products for specific selling seasons. By attending textile trade shows, designers and product developers can confirm developing trends, identify new resources and order fabric samples (Keiser and Garner 2007).

Fast fashion however has had a knock-on effect with the timing and competitiveness of these various trade shows. Hines and Bruce (2007) stated that the move towards fast fashion had influenced some trade shows to exhibit closer to the season and others to become more aligned with their competitors. For example the timing of Expofil and *Première Vision (PV)* have changed recently, Expofil used to show a number of months before PV, now they show simultaneously to be more aligned with this competitor.

The garment manufacturers and the retail buying sector use all of this trend forecasting information during product development but the thought processes of how they use it is not described in detail with regard to what information is considered useful or discarded and why. The decision making process could be down to intuition or experience. It is not

clear at what specific stages, or how many times, trend forecasting information is referred to by authors such as Brannon (2011), Keiser and Garner (2007), Hines and Bruce (2007) and Easey (2009) throughout this product development process. These problems will be addressed in the primary research by interviewing the retail buyers and designers, asking how often they refer to trend forecasting when building the trends into the ranges and how the decision making process works.

### **2.5.2 Trend forecasting agencies**

Trend forecasting agencies work as consultants to large companies. Their role is to analyse the social trends that are affecting the consumer. Their target clients are in the retail, technology, finance, automotive, food, fashion and the creative industries. They offer a service for those who are looking for new ways to communicate, to develop products and new strategies, and to develop company thinking on key issues their organisation is facing. These services can be bespoke or by annual subscription. Small or large scale conference activities are held regularly by the larger trend forecasting agencies for sharing the latest knowledge with clients. These larger agencies also provide additional workshops, presentations and newsletters to supply the 'hottest' information weekly, quarterly or biannually (McKelvey and Munslow 2008).

Since the 1990s, websites, most significantly WGSN.com, have pooled information from global offices on trends predicted by international consultancies with coverage of what is happening on the streets of cities across the world, to enable the fashion industry to have instant access to emerging trends and developments (Arnold 2009). The development of online communication has had the greatest effect on this industry enabling companies to report masses of information to feed the constant appetite for the 'new' within fashion. Some of the web based trend forecasting agencies are Here and There, based in New York who produce publications as well as having a subscriber website. The British version of this is Mudpie, who place the emphasis on their subscriber website Mudpie Click. Others include WGSN, (World Style Global Network) only online, who have offices globally but offer no publications or consultancy, and Promostyl, Stylesight and Trend Bible who produce publications as well as being on line (McKelvey and Munslow 2008).

Perna (1987) outlined the responsibility of the forecaster and what forecasting entails as an activity, how it is practiced by many, used at all levels and is continuous, evolutionary and expressive, cultivated and creative. The dynamics behind a trend are also discussed and how the particular skills that are required within the forecaster's job role. It is an industry where *'intelligence'* material is gathered, analysed and communicated to its clients as clearly, *'speedily'* and *'economically'* as possible. The forecaster works within a structured environment to a rigid timetable selling their trend packages to the fashion industry. They provide trend information in book format as well as online. The fact that the fashion industry use such trend packages, suggests there is a need for confirmation and reassurance of their judgement for confirming the trends they use. However, there is no information on how within the various sector levels the trend information is used by personnel in the fashion industry.

Trend forecasters offer fashion designers and retailers objective and early guidance about the changes in fashion colour, fabric and shape. Forecasters explore and analyse changing social, economic, cultural and political influences that are likely to affect fashion (Hines and Bruce 2007). They build scenarios of future trends to help develop new products, or to forecast future revenue or market size. They report on emerging global trends, consumption patterns, demographics and interview leading visionaries. This enables specific brands to react to the market needs more readily (Mckelvey and Munslow 2008).

### **2.5.3 Trend reporting within the trend forecasting agency**

The core staff working for a fashion trend forecasting agency may consist of menswear, women's wear or children's wear designers, colour consultants, textile consultants or graphic designers. Freelance experts are sometimes hired in an area of knowledge not catered for in the core staff. The editor creates the company philosophy and the publisher puts the information together. The retailing and merchandising professionals and fashion directors work as consultants for individual clients by applying their general fashion trends to the client's needs.

The design process used by the fashion forecasting agency starts with research which fits into the design process at every stage. This research process of seeking and recording creative information to be able to compile visuals for inspirational purposes is an investigation of what ‘instinctively feels new, fresh and exciting’ of current cultural influences. The generating of design ideas and sources are individual to the designer’s personal experience (Mckelvey and Munslow 2012). Participant 1, senior trend researcher from the trend agency Trendstop explains the work flow for how the trend forecasting process works when building the trend package in Figure 2.15 below.

- Trendstop – Participant 1 - Senior trend researcher**
- Monitoring consumer / cultural trends and movements
  - Identifying new directions taken by forward thinking creative people and designers
  - Spotting certain things, trickling through in early adopters (street style, edgy brands)
  - Making our forecast
  - Monitoring the trends through press previews, trade shows, second tier designers, forward retail

**Figure 2.15 Work flow for building the trend package**

**Source : An extract from an interviewee from Trendstop (2014)**

The forecaster speaks according to Brannon (2011) at presentations using many types of visuals, trend boards, slides, runway shows, fabric samples, and garment and colour samples. There is, it seems a detailed account of the actual type of information gathered by the trend forecaster to use but there is a lack of explanation as to what happens after that. There is no attempt by authors to describe the methodology taking place or stages of the process that may have taken place within the trend forecasting agency, as to how their research has been filtered and disseminated into the trends achieved for their publications or website.

Mckelvey and Munslow (2012) explained that the design team receive trend intelligence from international correspondents, who are placed in major cities worldwide. A limited

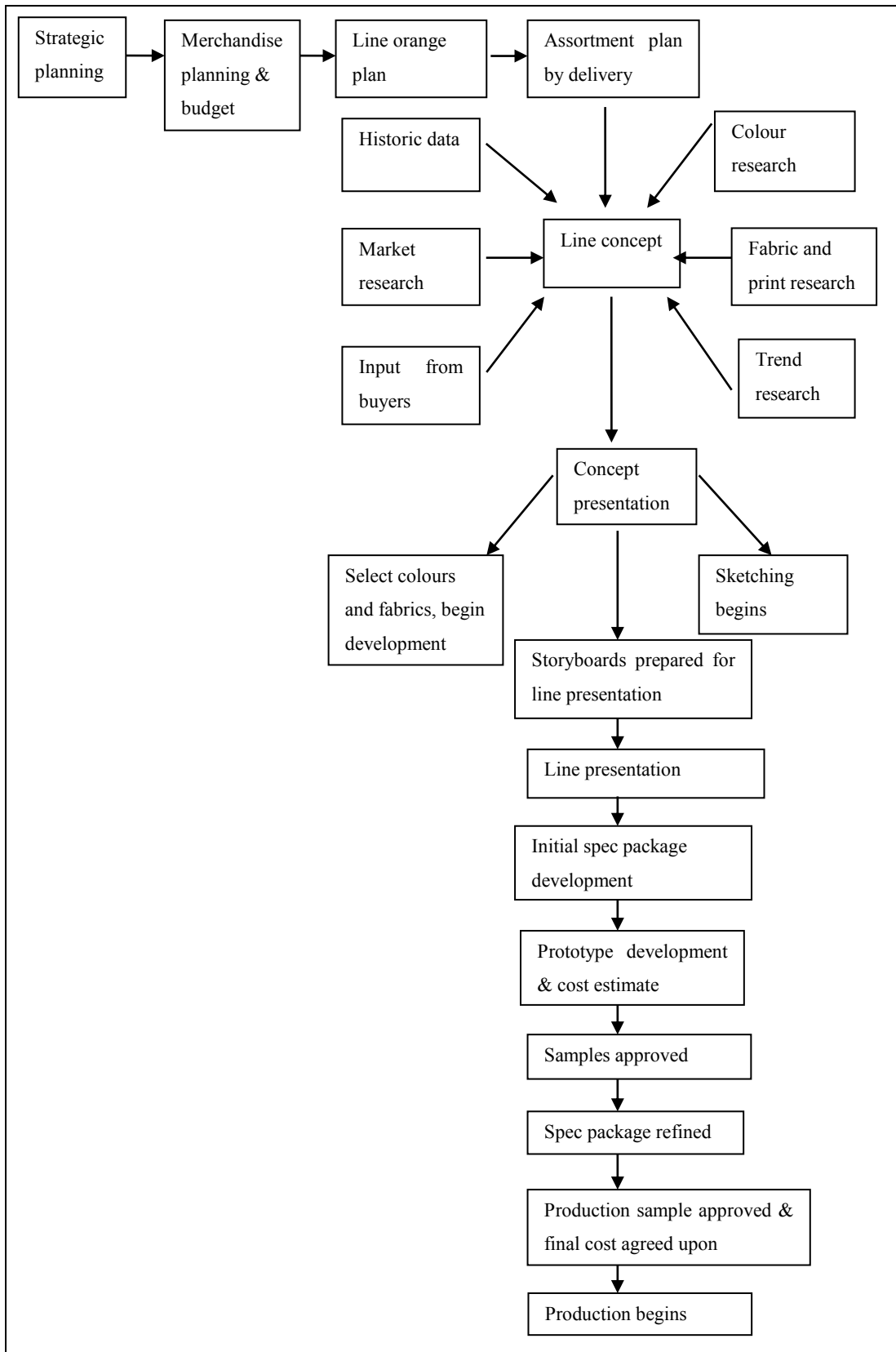
number of trend forecasting agencies employ trend chasers known as ‘cool-hunters’. These individuals are astute at predicting trends early and good at interpreting these trends into products (Jones 2011). The design team make the decision on how to use this information for trend development that will affect fashion and consumer awareness. All this information is then interpreted and visualised into forward looking publications, limited edition books containing fashion themes for the coming season. International agents promote and sell this service to clients worldwide.

## **2.6 Developing fashion trends**

McKelvey and Munslow (2012) noted that leading fashion manufacturers and retailers subscribe to a number of prediction companies’ books and online forecasting agencies. They go on to discuss various case studies describing what to look for in the research process for developing trends, such as mood and colour, noting how research fits into this design process at every stage. The sequence follows research, inspiration, and investigation, ideas for solutions, realisation and evaluation. However, there is no reference to exactly when or how often forecasting is referred to by the designers when planning the garment ranges during the product development process. Neither is there any connection to the wider fashion industry, such as how often they use the trend information during this process.

### **2.6.1 The product development process**

Keiser and Garner (2007) stated that the model of the product development process stages shown in Figure 2.16 below are showing colour research, fabric, print and trend research feeding into the line concept, concept presentation, storyboard presentation, line presentation and then moves onto prototype development through to sample approval. There is no mention of returning to trend forecasting information at any stage. It appears that the entire decision making is done at the onset and the buying input and historic data are key factors in the decision making process of the range as confirmed in the following statement.



**Figure 2.16 Planning at top levels of the company gives direction to the product development process.**

**Source: Keiser and Garner (2007:42)**

Keiser and Garner (2007) explained that environmental scanning is undertaken and that trend forecasters shop the market globally and locally recording information as they proceed. The type of information is discussed in detail but not how it is used in the manufacturing industry amongst the garment designers. Described are designers, trend specialists and merchandisers using this trend information to validate their instincts in order to reduce the risk inherent in trend forecasting.

Trend teams for private brands prepare more formal presentations. A small number of key members of the team are responsible for interpreting market trends for the entire organisation. They generally present their ideas to both the product development team and the buying staff. Trend forecasters frequently develop a seasonal trend book that highlights important trends in colour, fabric, silhouette and details for each category of ladies wear, menswear and children's wear. This book is presented formerly as a multi-media presentation to clients at seminars. Each team has its own trend book, development samples, storyboards on display and a PowerPoint presentation summarising the most important trends in season. Companies talk about what they do generally, but not when or at what stage trend forecasting is used, apart from at the beginning of the new season. They describe it as seasonal research in the product development process.

## **2.6.2 The use of colour in trend forecasting**

Eundeok *et al.* (2011) state that the first development of any seasonal range is colour. Usually colour trends are produced up to two years ahead of requirement by the fashion industry, so that the yarn manufacturers and suppliers may dye their yarns in the relevant colours well ahead of the selling season. The process of developing a colour range begins with the PV exhibition where 80 panel members from all areas of the fashion industry hold meetings to discuss the season and select a colour range. The colours are then grouped into themes and market sectors. Further discussions take place to refine the colours into a shade card. Meetings take place in Great Britain and Europe presenting the colours to fibre and yarn companies. Samples are then made by these companies to match the PV colour card. This ensures that the whole exhibition relates to the colour stories set by the panel for that season and promotes a consensual theme (Diane and Cassidy 2005). According to



McKelvey and Munslow (2008) colour palettes are developed and are worked in ‘stories’ inspired by exhibitions, gallery visits, interest in particular cultures, unusual imagery or historical imagery. Forecasting companies often provide the facility to manipulate the colour by allowing clients to use their colour palette as a guide to develop their own colour palettes.

Brannon (2011) observed that colour decisions begin early in the product development cycle. For designers a new collection begins with the creation of a colour palette, from this first step it will be 6-12 months before those colours appear on the runway or in a showroom. The colour forecaster edits the colour information from the trade shows, consults the work from previous seasons to maintain visual rhythm of colour evolution, continues to edit and modify the trends to suit the client profile and to fit around visual themes. A design or marketing executive makes decisions about colour using multiple forecasts, which tend to verify general colour trends. An example of a colour palette is illustrated in Figure 2.17 below.



**Figure 2.17 Example of a colour palette**  
**Source: Images collected by the author (2012)**

### **2.6.3 The colour development process**

Colour forecasting is one area of the industry that often seems to be shrouded in mystery. In reality, it is a very pragmatic process that draws upon expertise from around the world and it is a process in which many of the forecasters are collaborators or key players. One of the biggest influencers of colour in the fashion industry is PV the textile trade show in Paris, which works on colour 18 months ahead of the season. The forecasters in collaboration with the trade shows such as Expofil and PV are promoting colour stories by creating a consensus; however, when a large majority of manufacturers follow this consensus the high street will lack variety for the consumer. Most of the 1990's was dominated by the colour grey as a staple which was associated with non-movement, describing the effect it had on retail sales. Fashion retail sales figures at the end of the twentieth century and in the first four years of the new millennium showed a steady decline. In the new millennium a return to colour was implied by trade magazines but colour was still struggling to be used effectively by 2005 (Diane and Cassidy 2005). The development of a seasonal colour palette is rarely a radical change it is more likely to be an evolutionary process. A new colour can take several seasons to establish itself in the consumer's consciousness and become accepted commercially. Therefore, retailers often do trials on colour to test the consumer response (Scully and Johnston-Cobb 2012).

### **2.6.4 The use of trend boards in the fashion industry**

Brannon, (2011) stated that forecasters use trend boards at every stage of the trend forecasting process. Trend reporting is concerned with fibres, yarns, blends and if there are any new developments in fabrics. Colour forecasters use trend boards to communicate the seasonal colour forecasts to their clients. Fashion directors working for the garment manufacturers use trend boards to present to the retail buying teams. The retail sector use trend boards to report on fashion trends from the runway and the streets, conveying this information to their in-house design teams and externally to the manufacturing suppliers. These trend boards indicate colour and fabric stories, trend direction, styling and pricing. An example of a trend direction board is illustrated below in Figure 2.18 and a trend styling board in Figure 2.19. The traditional way to communicate trend forecasting

information is through presentations to clients by their agents according to the trend forecasting agency Perclers. Their agent's role is to supply publications, market trends through presentations and to provide additional support and guidance to their customers. The agents have six monthly meetings with the in-house team to introduce the season's trend and go through the key influences (McKelvey and Munslow 2008).



**Figure 2.18 Trend direction**

Source: Images collected by the author (2012)



**Figure 2.19 Style direction**

Source: Images collected by the author (2012)

## 2.6.5 The fibre manufacturers influence on colour

Since the 1970's, globalisation of the sourcing chain has seen a shift to the manufacturing of fabrics and garments at low cost mills in Asia. Fabric mills and fibre companies in the west have been decimated and the survivors have eliminated in-house fashion forecasting. Brands and retailers have grown more powerful and established their own trend forecasting departments (Scully and Johnson-Cobb 2012). In 2011 only a few fibre companies have a budget to still produce colour cards such as Lenzing, Nilit and Cotton Incorporated, this change contributed to the success of independent colour forecasting companies in the 1970's. Asian fabric and fibre companies lack the expertise to develop colour direction for their customers.

## 2.6.6 Inspiration for fashion trends

Eundeok *et al.* (2011) proposed that the next stage on from colour is that of inspiration for garment styling, where it comes from exhibitions, galleries, street style, culture, artists shows, retrospective, science, innovative design and architecture, even shop windows in New York. In a visually rich world there is a constant need to keep stimulating the fashion consumer, be it through mood, print, pattern or texture. An example of inspiration from architecture and galleries is illustrated in Figure 2.20, design innovation in Figure 2.21 and Figure 2.22 below.



**Figure 2.21 Inspiration from architecture and galleries**

**Source: Images collected by the author (2012)**



**Figure 2.21 Innovative design**  
**Source: Images collected by the author (2013)**



**Figure 2.22 Innovative design sketch book**  
**Source: Images collected by the author (2011)**

Seivewright (2007), Na Ayudhya *et al.* (2007) and Ames (2008) observed that the ability to innovate according to cultural and social trends and that having an awareness of street cultures, new trends, new technologies and global interests is as important when researching for a new collection as it is for developing a new brand. Tracking trends is not just about looking at fashion it is also about demographics, behaviour, technologies and

lifestyle. Forecasters use cohort membership, lifestyle, and life-stage analysis to project potential acceptance or rejection of trends and styles. Fashion responds to the ‘spirit of the times’, the problem with this is there is little advance warning of potential fashionability in proposed looks. The industry has to wait until fashion demand converges on something symbolic of the times. Recognising the ‘spirit of the times’ can be difficult while living in them. Retrospect allows distinguishing characteristics of an era to become clear (Brannon 2011). Participant 4 of Mudpie notes:

*‘The skill is not in gathering and processing the information, it is assessing the likely speed to market which requires an accurate assessment of when that trend will be at its most important’.*

(Anon, 2010b)

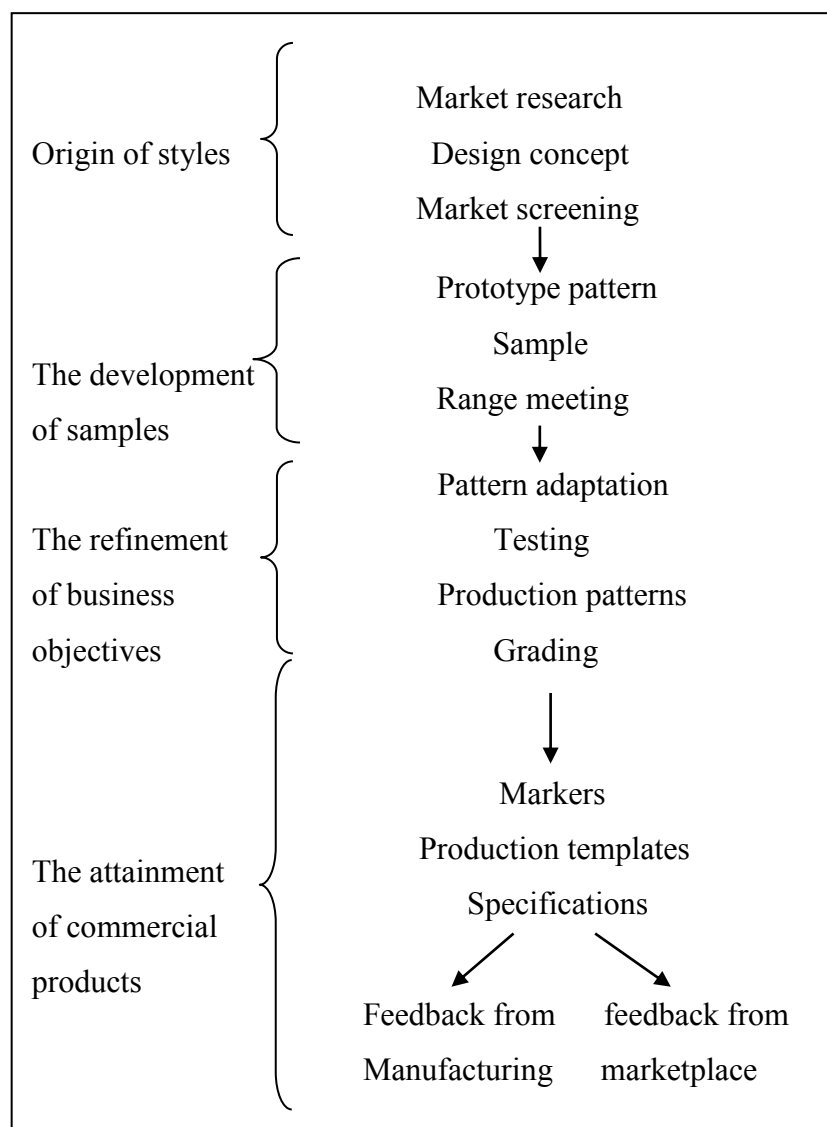
The trend researcher from Stylesight confirms that trend forecasting requires being open-minded and constantly entrenched in a flow of information consumers are interested in and influenced by (Anon, 2010a).

### **2.6.7 The process of developing design concepts**

Each season, designers work with merchandisers to develop new fashion lines. They review information on trends, colours, styles, fabrics and other materials, often using fashion forecasting services. In larger companies, merchandisers plan the overall fashion direction for the coming season and give direction to their design teams about seasonal themes, apparel items, accessories, colour and fabrics. In smaller companies, the owners or designers perform these tasks (Dickenson 1999). The retailer supplies the critical path to their suppliers. The critical path is a guide to all dates and deadlines that the suppliers must meet. It also contains presentations and meeting dates for the following months ahead to ensure that the product will be produced and distributed to the stores ready for the range launch date (McKelvey and Munslow 2012).

It would appear that authors do not discuss in detail how often trend forecasting services are referred to or how often they meet within a season. Colour forecasting has been taken

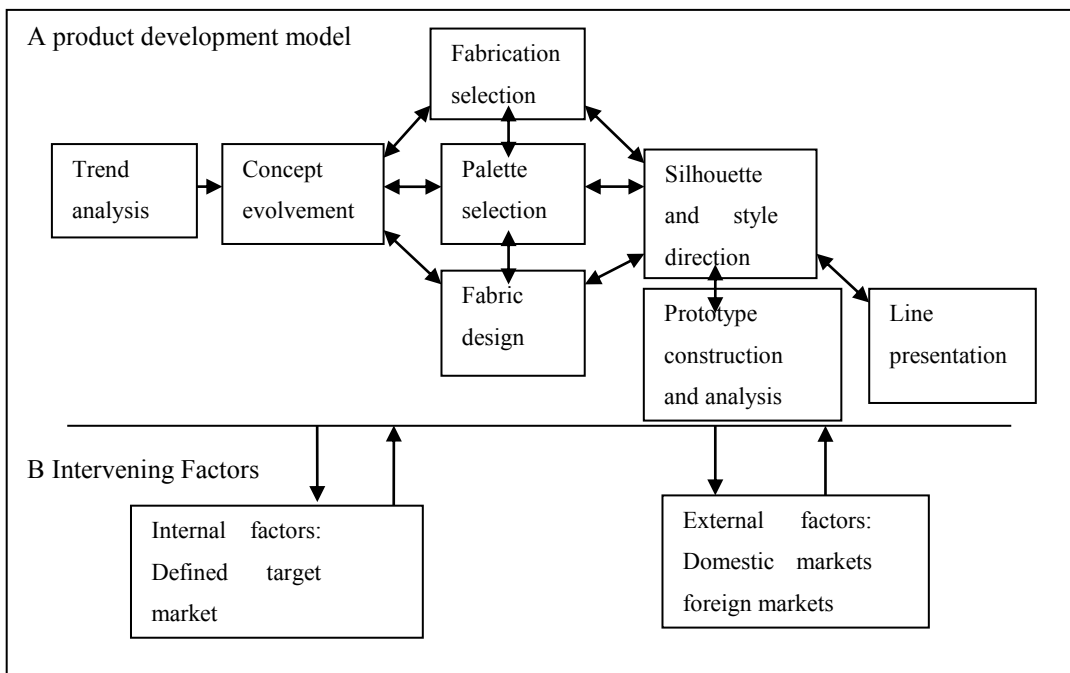
for granted. The designer's critical path is discussed from the buyer's point of view rather than from the designer's point of view. Therefore, the detail of the design process of producing the range is skimmed over briefly leading to the conclusion that current literature is under developed in this area. This is illustrated in the model by Carr and Pomeroy (1992) who give an account of apparel design and product development in Figure 2.23 below which identifies five steps to product development: consumer research, design concept / concept development, sampling, specification development and finally pre-production sampling. This model is based around the buying season and not the designer's role. It shows market research and the design concept stages but there is no detail of how the process is achieved.



**Figure 2.23 The process of apparel design and product development**

**Source: Carr and Pomeroy (1992:13)**

The model in Figure 2.24 below focuses on the conception stage. It shows how the sequence of events take place throughout the creative apparel design process, along with its internal and external influences. This model stops at the line presentation phase. It shows how the design interfaces with other company activities providing creative, technological and commercial input in a total marketing environment. Trend forecasting information is likely to have been accessed in the stages described up to the line presentation but it does not appear to be shown in any of these stages. Very early on in the product development process fabrics are linked to the silhouette and to the mood of the collection.

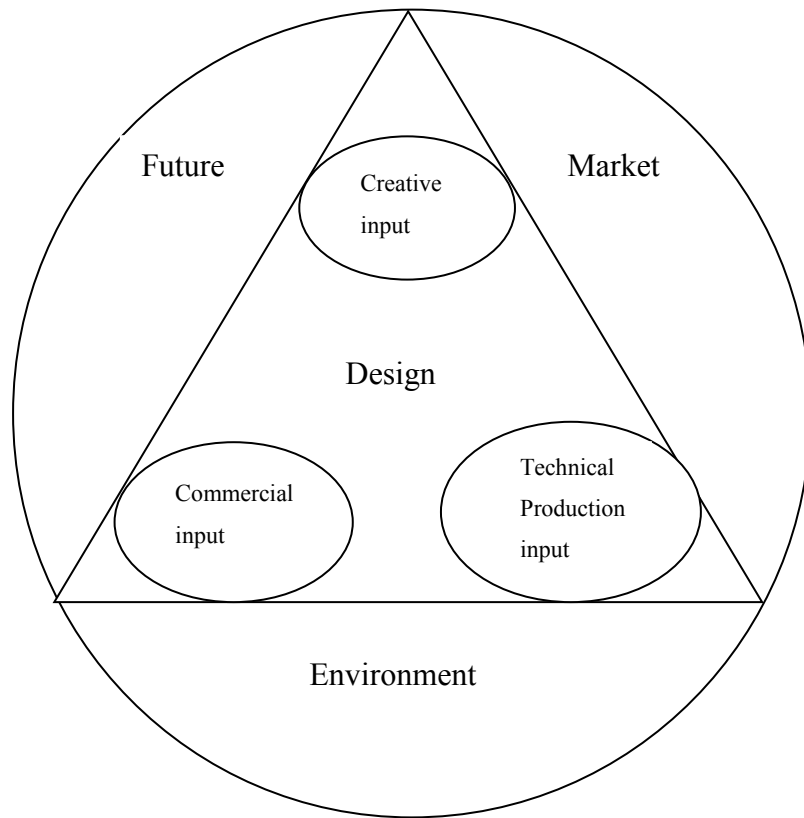


**Figure 2.24 Product development model**

**Source: Gaskell, (1992:20)**

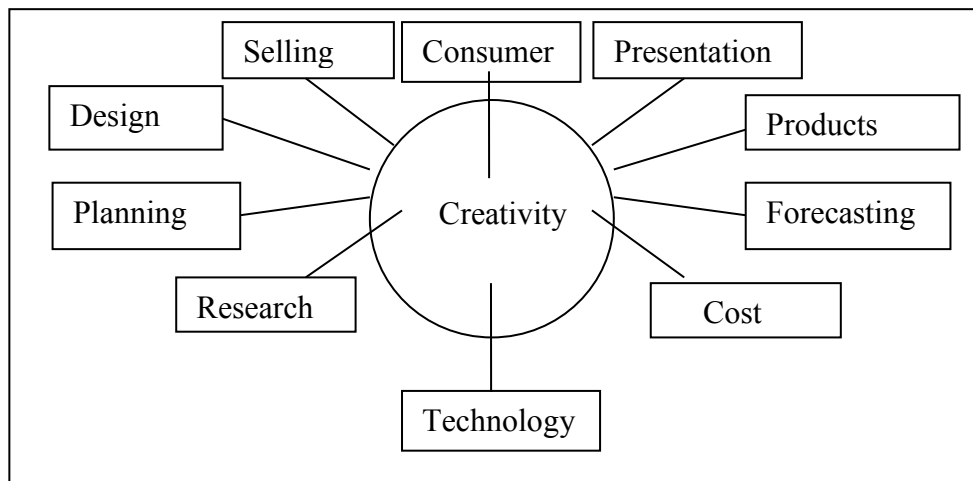
Figure 2.25 illustrates the various types of research information that can be extracted from the environment and how they integrate the marketing, merchandising and product development processes to develop a line plan.





**Figure 2.25 Design relationships**

**Source: Knox (1989:59)**



**Figure 2.26 Creativity and design activities**

**Source: Knox (1989:59)**

In the model shown in Figure 2.26, it can be seen how creativity has a multi-faceted relationship with all areas of company strategy. It does not show how trend forecasting is used within these activities. It could be interpreted that trend forecasting is only undertaken at the beginning of the product development process and is not showing that it could be referred to several times during this process.

### **2.6.8 How literature and existing models inform the development of the conceptual models**

Information synthesised from critical appraisal of this literature review will contribute to building conceptual models for seasonal and fast fashion. Important issues discussed in the literature, which affect the product development process for both seasonal and fast fashion will become key themes. These identified themes will be analysed into three main areas: the trend forecast, the process and the supply chain. The trend forecast category includes trend forecasters identifying trends, the usefulness and effectiveness of trend forecasting and the fashion trend report. The process category includes team meetings, decision making and how trend forecasting is used in design development for range planning. The supply chain category involves fashion cycles, lead times and model building.

Current models will be studied to identify stages currently represented in the product development process using the literature key themes for guidance. Each category will be expanded upon to include:-

- Stages in product development model where trend forecasting is implemented
- The role and responsibilities of buyers and designers in range planning process
- The relationships and communication channels
- Product lead times and buying cycles
- The timescales for new trends

These elements were recorded in into the Table 2.3 below to consolidate useful information to build the proposed models. This table reveals both overlaps and limitations of extant models.

Model elements	Knox (1989)	Gaskel (1992)	Carr and Pomeroy (1992)	Keiser and Garner (2007)
Market research			√	√
Trend research	√			√
Trend analysis		√		
Concepts				√
Style direction	√	√		
Planning	√			
Range meetings			√	
Line presentation		√		√
Sampling				√
Production	√		√	√

**Table 2.3 Model elements used in conceptual models**

Existing models were found to be useful for identifying the following stages for model construction for seasonal fashion:-

- Market and trend research at the start of range planning
- Trend analysis in the first stage of the model
- Range planning and presentations
- Production / Range completion

Existing models do not show where trend forecasting is implemented, nor the designer's role in the range planning process. Furthermore, for constructing the models in the fast fashion process, existing models were of no help because it could not be seen where fast fashion fits into the model or what were the timescales for new trends in this process. For this study, the timeline in regard to the product development process and the stages where trend forecasting is used is of particular interest in the fashion cycle. The impact of fast fashion on trend forecasting for the seasonal retailers is of significance and it is necessary to develop models that show how fashion cycles are affected by fast fashion. Therefore, the strategy for fast fashion is informed by literature and research articles rather than by existing models.

## 2.7 The use of trend forecasting by industry professionals

Goworek (2007) suggests that the ODM and OBM manufacturer's designers may compile story boards with general trends applicable to the season to be shown to several retailers, or put them together for individual retailers. A meeting would take place between the designers and the buying office. Buyers observe trends rather than create them. Comparative shopping is carried out by the buying department observing their competitors and noting any emerging trends. Jackson and Shaw (2009) describe online trend forecasting agencies as a '*living portal to global fashion events, recording information as it occurs*'. This new information can be accessed quickly from anywhere in the world as well as their printed trend books providing fabric swatches and colour details. Many fashion brands use both types of information together.

Eundeok *et al.* (2011) suggest that there is a strong mutual dependence between forecasting and promotional activities. Themes based on forecasts are important elements of promotional campaigns created far in advance of the actual selling season. These promotional campaigns are used to influence the consumer to the emerging trends. Trend services provide an overview of the season including key changes in consumer attitudes and trends, including information about influencing factors behind the trends. All this information is disseminated in trend books, on visual boards including sketches of garment styles, colour, and fabric swatches and DVD's, along with online information for specific segments of fashion 18-24 months ahead. Therefore implying that trend forecasting is undertaken pre-season following the traditional fashion calendar, again this does not explain when or how often forecasting information is referred to.

Eundeok *et al.* (2011) state that all professionals, such as apparel designers, product developers, colourists and textile artists, consider the most important inspirational sources to be forecasting material. The author goes on to name the various agencies and the growth of online companies and the global effect of providing 3-6 monthly overviews ahead of the season along with weekly and monthly reports. They do not provide details of how the information is used nor how often it is used in the industry.

### **2.7.1 Retailers / Buyers / Merchandisers**

In section 2.2.1 of the literature review the retailer's critical path is referred to by Easey (2009). This model sets out the retailers' buying sequence for the season beginning with the analysis and development of new concepts, along with analysis of the previous year's range. Trends analysis is conducted with the in-house design staff, which is followed by the development of the range planning ideas from the buyers and suppliers. Suppliers' development meetings continue, final ranges are then approved at director level in the following two months. The next six months are devoted to production and quality. Again the use of trend forecasting information is not discussed in any detail, placing emphasis on the buying role activities in planning of the range.

### **2.7.2 Designers use of trend forecasting information**

Forecasting is a tool used by designers, manufacturers, retailers, marketers and CEOs, to give their brands' creative dynamism for an increasingly competitive edge in the market place. The position of the forecaster at the manufacturing level is a demanding job that carries with it heavy responsibilities of leadership inherent in practical terms of news, production and saleability (Perna 1987). Designers have to learn how to interpret the information for their market areas, skilfully '*decoding, translating*' and '*rendering*' the results and having a '*feeling*' for colour etc., that is in essence 'creativity' (McKelvey and Munslow 2008).

Participant 4 from an interview in 2010 considers that consumers make different choices based on their emotional connection with the present, which is why their future mood can be perceived by observing the factors that may affect the future. These factors are often socio-economic, political, and technical or simply influences from popular culture. For example, the current theme for 'fairy tale' in the world of cinema implies both a back to basics and a need for narrative. This theme appears to influence short term trends in fashion. However, it is important to note that companies such as Disney and Warner Brothers subscribe to trend information from Mudpie; therefore, they would have been

aware of these developing trends at least 3 years previous to when Mudpie first published their 'surrealism' trend in 2006.

### **2.7.3 Designers and buyers at trade fairs**

Brannon (2011) noted that yarn shows provide an overview of the newest fibre blends and finishes for improved performance and new textures for innovative styling. Expofil, a European yarn fair based in Paris, provides the earliest view of new products and trends for the selling season 15 months ahead. These are held bi-annually for colour, fabric and trends developed in consultation with other trade fairs, fibre producers and forecasting services such as Trend Union and Promostyl. Designers and product developers attend these shows and work with these companies to research the potential for new fabrics and obtain sample fabrics for their own in-house presentations. Brannon (2011) also made reference to fabric trends emerging before fashion trends because reviewing and selecting fabric is one of the initial stages of product development. Trends based on textile development are introduced, adopted and experimented with by more avant-garde designers, then move into more mainstream usage into different product categories and price points.

Première Vision, held in Paris is probably the best known trade fair in the world. Shows are held in New York, Moscow, Shanghai and Tokyo. Indigo, the trade fair for textile design show simultaneously to Première Vision, along with Expofil, Le Cuir A Paris for leather goods and Indigo for textiles. This 'international' concentration brings weavers spokesmen and forecasting companies together, in advance of each trade fair to exchange ideas of significant colour and fibre trends for the coming season. This information is previewed by the exhibitors who then utilise this information to give strong direction at the show. Fashion forecasting companies attend all of the major fabric and yarn trade fairs. At Première Vision fabrics and colours are shown for a period of 18 months in advance of the respective retail season.

A few weeks before the trade fairs occur, a meeting is used to consolidate the main directions which are shown as audio-visual presentations and films, fashion seminars colour stories, fabric information and catalogues. There are many other professional textile

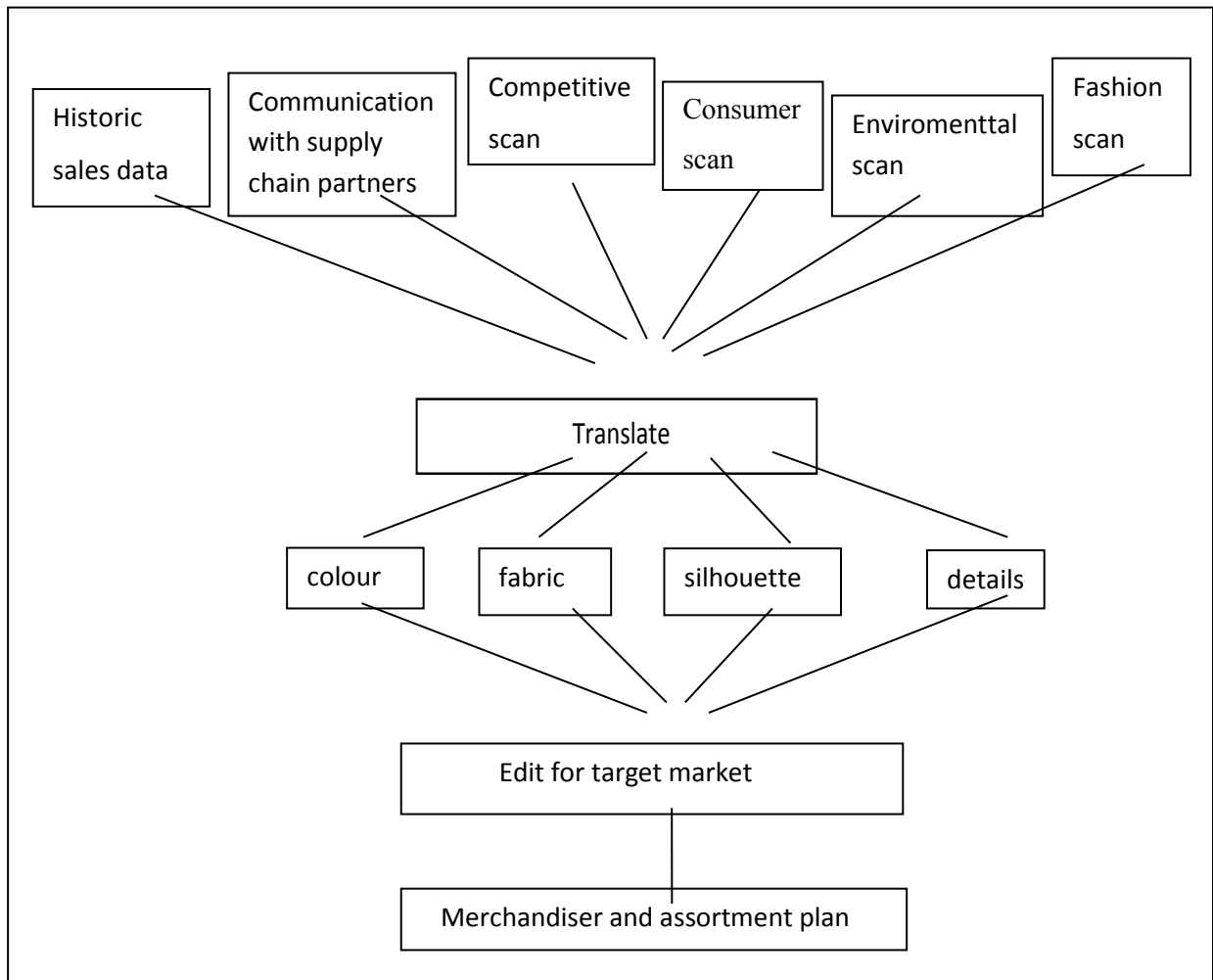
agencies such as Cotton Incorporated, Lycra.com and the Woolmark Company available for support and information around the world, most are accessible online, they all promote their products in a competitive market. The advent of the World Wide Web has revolutionised the industry and enabled the new online companies to publish forecasting information that reports on global trends. McKelvey and Munslow (2008) discussed using trend forecasting information and the role of forecasting but not actually when apart from the beginning of the season the information is referred to.

#### **2.7.4 The buying department's use of trend forecasting information**

Perna (1987) outlined the fashion industry structure and refers to considerations taken into account in trend forecasting from research to tracking sales and cultural influences based around the buying office. Goworek (2007) explained that from the buying department's point of view there is a review of sales figures and that the garment range is based on the last season's performance. They research trends both past and present along with the suppliers and their design team for product development, who provide mood boards for the range review. This poses the question, 'do sales figures become more relevant than the trend information'?

#### **2.7.5 Business planning functions in the apparel industry**

Keiser and Garner (2007) described the business planning functions in the apparel industry as being broken down into components such as strategic planning, merchandise planning, creative planning, technical planning and production planning. Their model is shown Figure 2.27.



**Figure 2.27 Fashion forecast flowchart**

**Source: Keiser and Garner (2007:139)**

Creative planning tracks trends and interprets them for any company’s target market. Trend and design professionals require keen instincts to pick up on social, cultural and aesthetic trends as they affect fashion. The merchandiser, trend specialists and designers look at the global fashion influences and anticipate what to embrace in the near and future seasons. Trend design professionals determine colour, fabric and style silhouettes for the product range. This flow chart does not describe the process they go through in detail. Again it is based around the buying function and not around the manufacturing design process.



## **2.7.6 Marketing / Public relations (PR) people / fashion press**

Jackson and Shaw (2009) discussed the role of PR as working with a well-established fashion calendar where set dates are agreed for when the fashion seasons begin and end. For example, a textile show such as PV, the global RTW (round the world) shows and the main glossy magazines such as Vogue and Elle all have different lead times relating to the same season. However, the season that they are all contributing to in different ways has a start and an end date tied to the retail sales of products to consumers.

Many retailers, designers and fashion brands prefer to run their own in-house PR operations. Regular liaison with fashion media is critical, usually involving meetings with editors, assistants and stylists. Press days are arranged and fashion journalists are given look books and press releases. Smaller companies use independent PR organisations and consultants. The PR company will develop individual press coverage for each client and produce publicity and promotional campaigns tailor made to their requirements (McKelvey and Munslow 2012).

## **2.8 The validity of information**

It was found that most of the factual information was repetitive from text to text. This can be evidenced from the bibliography content. At the present time there is a minimal amount of information available on this subject, most authors discuss trend forecasting from a general point of view with a bias towards the buying set up point of view and not the designers or trend forecasters point of view or how often they use trend forecasting information.

### **2.8.1 Lack of supporting evidence**

Brannon (2011) discussed the trend forecasters role in terms of what they research when predicting fashion trends, how they must scout the market, make merchandise recommendations to the retailers and focus on developing the seasonal trend forecasting

reports. However, there is no attempt to describe the methodology taking place or the stages of the process that may have taken place within the trend forecasting agency, as to how their research has been filtered and disseminated into the trends achieved for their publications or website.

McKelvey and Munslow (2012) discussed case studies from various trend forecasting agencies, describing what they look for in the research process for developing trends, such as mood and colour, noting how research fits into this design process at every stage. The sequence follows research, inspiration, investigation, ideas for solutions, realisation and evaluation. There is no connection however to the wider fashion industry as to how often trend information is used during the product development process, or reference to exactly when or how often trend forecasting is referred to by the fashion designers when designing the ranges or buyers when planning the garment ranges. McKelvey and Munslow (2008) referred to trend forecasting information being used in the fashion industry only at the beginning of the seasonal range development. These processes are not recorded or discussed by authors in any models for buying or product development, authors are drawing conclusions generally but are not pinpointing key roles, it is all speculation.

The detail of the design process for producing the garment range is skimmed over briefly leading to the conclusion that current literature is under developed in this area. This is illustrated by Carr and Pomeroy (1992) in Figure 24 in section 2.6.7 of the literature review, who give an account of apparel design and product development, which identifies five steps to product development: consumer research, design concept / concept development, sampling, specification development and finally pre-production sampling. This model is based around the buying season and not the designer's role. It shows market research and the design concept stages but there is no detail of how the process is achieved. The model by Gaskell (1992) in Figure 25 in section 2.6.7 of the literature review focuses on the conception stage for product development. It shows how the sequence of events takes place throughout the creative apparel design process, along with its internal and external influences. This model stops at the line presentation phase. It shows how the design interfaces with other company activities providing creative, technological and commercial input in a total marketing environment. Trend forecasting

information is likely to have been accessed in the stages described up to the line presentation but it does not appear to be shown in any of these stages.

In the model by Knox (1989) in Figure 27 in section 2.6.7 of the literature review it can be seen how creativity has a multi-faceted relationship with all areas of company strategy. It does not show how trend forecasting is used within these activities. It could be interpreted that trend forecasting is only undertaken at the beginning of the product development process and is not showing that it could be referred to several times during the product development process. This is also illustrated in the model by Keiser and Garner (2007) in Figure 28 in section 2.7.5 of the literature review, the trend forecast again is only referred to at the beginning of the season and being based on current catwalk shows, forecasts closer to season and the transmission of visual digital photography but there is no mention of how often trends are referred to or how the process is managed. The mention of digital transmission of visuals poses the question of whether fashion images are just used and trend packages are by-passed.

The retail buying sequence of events referred to by Easey (2009) in 2.2.1 of the literature review illustrates the lack of reference to trend forecasting and if or how it is used in the planning stages of the ranges. Trend forecasting is mentioned at the beginning of the range sourcing stage but then only refers to further research being carried out to include shopping trips and trade fairs. Flexibility is made reference to when launching new ideas and promotional ideas are discussed but there is no suggestion of trend forecasting information being used in any detail. The rest of the planning stages discuss production placing emphasis on the buying role activities in planning the range. In the model by Hines and Bruce (2007) Figure 1 and Zara's supply model Figure 7 in section 2.2.3 of the literature review, again the emphasis is on the buying role.

The garment manufacturers and the retail buying sector all use trend forecasting information during product development but the thought processes of how they use it is not described in detail in regard to what information is considered useful or discarded and why. The decision making process could be down to intuition or experience. It is not clear at what specific stages, or how many times, trend forecasting information is referred to throughout this product development process. The fact that the fashion industry use such

trend packages, suggests there is a need for confirmation and reassurance of their judgement for confirming the trends they use. However, there is no information on how within the various sector levels the trend information is used by personnel in the fashion industry.

Tyler *et al.* (2006) discussed the lengthy product development timetable locking retailers into a situation where responsiveness to demand is very limited. Forecasting is the only option for decision makers as there is low potential to follow fashion trends. Decisions based on the trend forecast demand thus, become a block to flexibility. The rise of fast fashion has affected the timing of the traditional product development process. Therefore, traditional conceptual models and theories fail to provide adequate insight for coping with this new and rapidly changing business environment (Cravens *et al.* 2009). The current models need to be critically analysed and the processes reworked for fast fashion. The rise of fast fashion provides the opportunity to identifying a taxonomy of models with a shortened time frame for this changing market.

### **2.8.2 Areas of further investigation – models – retailers/manufactures**

The literature review cover the process of trend forecasting from a wide sector of fashion industry personnel, such as buyers and product developers, fabric suppliers, garment manufacturers, designers and trend forecasters. The time line involved for trend prediction was built around a set calendar for the seasonal buying process and trade fairs relevant to the fashion industry.

The literature review information had been sourced to understand the use of trend forecasting within the fashion industry. A lack of in-depth knowledge appeared to be evident regarding the methodology of trend forecasting with regard to the sequence of events leading up to producing the trend package in the trend forecasting agency.

From the findings in this chapter, the use and application of trend forecasting information in the buying cycle for product development within the fashion industry was unclear. There was a lack of in-depth information recorded as to what stages in product

development trend forecasting was referred to. The general term fashion forecaster was used which could apply to various sectors of the fashion industry appearing ambiguous. The purpose of trend forecasting is to be able to predict the trends in advance to be able to manufacture products for consumer demand at the right time. The nature of fast fashion has affected the seasonal processes of trend forecasting and the buying cycles. The frequent demand for new trends and quick response issues, has led to a more detailed explanation required of how trend forecasting is used in range planning. The sequence of events needs to be clearer and at what stages trend forecasting is used in the product development process for seasonal fashion and fast fashion applications.

### **2.8.3 The implications of existing product development models on seasonal and fast fashion**

Current models do not represent critical stages where key decisions are made during the range planning process. Therefore, this research will focus on the interaction of key personnel, specifically the trend forecaster, the designer and the buyer. The research will focus on identifying how decisions are determined when building the garment range, and who takes the lead on making these decisions (the buyers, designers or product developers). It is evident that there is a lack of where trend forecasting is explicitly represented in the planning stages in any current models, apart from the few researchers who give it a mention and locate it at the beginning of the model. Knox (1989), Gaskel (1992), Carr and Pomeroy (1992) and Keiser and Garner (2007) places trend analysis and design concept at the beginning of the product development process in the model, supporting descriptions given by Brannon (2011) and Perna (1987). Easey (2009) records the seasonal buying sequence but does not show in this model where trend forecasting is being implemented in the later stages of the range planning process.

This research intends to ascertain at what stages in the model industry professionals incorporate trend forecasting information into the product development model. Existing product development models concentrate only on the buying functions in this process and range planning is only represented from the buyer's viewpoint. There is no reference to the design role within the product development process. This research aims to address the fact

that the important role of the designer is not fully represented in any existing models. Designers are also using trend forecasting information in the process in a way that is not discussed or been researched in any detail by authors and remains elusive. Providing this precise detail will contribute to new knowledge in contemporary practice as the majority of current literature such as Perna (1987) is outdated. Brannon's (2011) latest edition has not developed any new information from the earlier edition published in 2000 and does not provide a foundation for developing research in this area.

Bye (2010) outlines the seasonal fashion calendar and discusses reduced timescales to meet fast fashion generally. There are gaps in knowledge about the details of these timescales used in the design sector of the fashion industry and they are not recorded in existing models. Traditional lengthy production times used for seasonal fashion are challenged because it is difficult to keep up with the pace of fast fashion. The 'open to buy' process used in seasonal fashion is not fully explained in terms of when during the season it is carried out or how this is facilitated. These procedures are not recorded down in any existing models. The fast fashion process is not represented in any existing models either, and the timelines referred to describe seasonal fashion, not fast fashion. There is no representation of the differences between seasonal fashion and fast fashion in existing product development models. This identifies the weaknesses in existing product development models.

#### **2.8.4 How fast fashion has disrupted our understanding of the traditional fashion models.**

Fast fashion has disrupted our understanding of the traditional fashion models because of issues in the fashion industry due to the impact of fast fashion in terms of product lead time for manufacturers, product buying cycles for retailers and the role of trend prediction for forecasting agencies. Traditional models are all based on seasonal fashion cycles and set fashion events paramount to the function of the fashion industry and impacts on all sectors within the supply chain. The product development cycle described in the literature has an extended lead time and necessitates long term forecasting. Fast fashion is concerned with delivering the product within much shorter lead times. Short product lead times affect

the traditional planning process because this puts pressure on the designers and buyers to produce products at a faster pace, alongside the longer planning times employed for the traditional seasonal process. Therefore, traditional models and theories fail to provide adequate insight into this rapidly changing environment, which is accustomed to long term planning for designing, manufacturing and distribution (Cravens *et al.* 2009). The models describing the theories of fashion movement by Roussou (2012) and Jones (2011) do not reflect the changes driven by modern consumer choices and also celebrity influences on fashion trends and styling.

Previously published research discussed model building for the colour forecasting process (Cassidy and Cassidy, 2012) but generally existing models are outdated because they fail to recognise the fast fashion process. Although the literature regarding trend forecasting is diverse, the depth and detail is not presented by the authors to provide a framework or foundation for developing any new models. There is no evidence of any development in this specialist area of research to date. Therefore, this research aims to develop a model or series of models to amend the existing practice, to reflect the changes in the use of trend forecasting in product development and to understate the need for the development in this area. Models will be constructed through a combination of theory, following themes taken from the literature, and primary research data.

## **2.9 Summary**

Chapter 2 was used to assess the value of the current literature available surrounding the trend forecasting profession and to clarify, how trend forecasting services were incorporated into the product development model in the fashion industry. There would appear to be a lack of explanation and understanding of the application of trend forecasting within the current product development model. Authors discussed how trend forecasters gather trend information and where their inspiration for fashion trends originates, which is useful for background research in this study, but there is no mention of the sequence of events leading up to producing the trend package within a trend forecasting agency. Research articles briefly cover colour forecasting but mainly in terms of methods for improving accuracy in colour prediction and the impact of colour forecasting within the

supply chain. It is evident that no research has been conducted into model development for the trend forecasting process within a trend forecasting agency or how trend forecasting affects designer's decisions in the manufacturing and retail sector.

By broadening the literature search to incorporate fashion marketing aspects, additional supporting information contributed to this research regarding fashion trend research, fashion industry dynamics, the fashion retail structure and the critical path. However, published articles have proved limited in the area of how trend forecasting is used in the product development process. The designer's point of view is not represented but there is a wide range of supporting literature surrounding the fashion buyer's role in the product development process. The relationships and communication channels between the buyers and designers are not discussed as to how trend forecasting information is used when developing the garment ranges. It is not clear how decisions are determined when building the garment ranges, or who takes the lead on making these decisions. Therefore, it is difficult to ascertain at what stages in the model industry professionals incorporate trend information when developing the garment ranges.

Consumer behaviour, fashion marketing and trend adoption theories have provided a clear overview of the fashion industry but not from the designer's viewpoint. Fast fashion is covered in relation to fashion buying, consumer behaviour and supply chain issues. However, the timescales involved in the 'open to buy' process for seasonal fashion and the fast fashion process affecting the supply chain are not recorded in any existing model development. The necessity for this research fills the need for more academic study in this area, providing understanding and clarity about the role of trend forecasting in the product development process. The importance of this must not be overlooked as it will contribute to new knowledge in these specific areas. The majority of discussion by current authors is outdated and it is clear that there are significant gaps in the current literature concerning these issues. The original contribution to knowledge lies in the seasonal and fast fashion models proposed in this research, which will facilitate key personnel in the fashion industry in their new product development.

In Chapter 3 approaches implemented to investigate the application of trend forecasting in the trend forecasting agencies and in the product development process in the fashion



industry will be discussed. A qualitative approach to the data collection will be outlined. The theoretical framework for soft systems methodology (SSM) will be explained and discussed as a tool for analysing and understanding the trend forecasting process. A fundamental part of SSM is that themes from the literature review were used purposively in the stages of the method for interpreting the problems facing the trend forecasting agencies and the retailers in the product development process.

## **Chapter 3: Approaches implemented to investigate the application of trend forecasting in the fashion business model**

The key themes that emerged from the critical review of the literature on the whole product development process were, the trend forecasting methods, the personnel in the supply chain and the process model. The current research used a qualitative approach to collate data in relation to each of these themes mainly to develop the knowledge base of the trend forecasting discipline. A pilot study was undertaken to investigate whether the enquiry and the related format were relevant to the respondent or not. During the next stage, interviews with trend forecasters and retailers were conducted and semi-structured interviews formed the case studies. Soft Systems Methodology (SSM) was used to develop current models for trend forecasting which was mainly obtained from the case studies. There is a lack of information in the literature on how exactly trend forecasting is implemented into the fashion product development process. The data collected from this research will contribute to the design and the evaluation of taxonomy of models relating to theory and practice of new product development and trend forecasting process.

### **3.1 Investigative procedure**

To meet aim two of this research an exploratory study was conducted involving process mapping and interviewing the trend forecasters in the trend forecasting agencies and the buyers and designers in the retail fashion industry from the UK. These case studies used Semi-structured interviews / questionnaires. The focus of the interviews with the forecasting agencies was based on the processes they used and how the trend forecasters developed their trend packages. The interviews with the retailers focussed on how trend forecasting was used in the product development process. The concept of fast fashion and its role in changing the model of fashion trend forecasting was critically analysed. This data collection was used to establish theoretical models which were tested in industry for seasonal fashion and fast fashion contexts. These are the instruments that will be used to meet aims three and four. The combination of triangulation and the case studies give validity and reliability.

The data collected in the process maps was interpreted using SSM as described by Patching (1990) as a tool for investigating and understanding human activities. This methodology provided a set of guidelines for examining systems with a view to proposing improvements. A holistic view was taken by considering the organisation as a system or series of systems. In this case, models constructed and tested in the design sector using soft systems methodology, linking tools with time scales, was used to understand the fashion forecasting process.

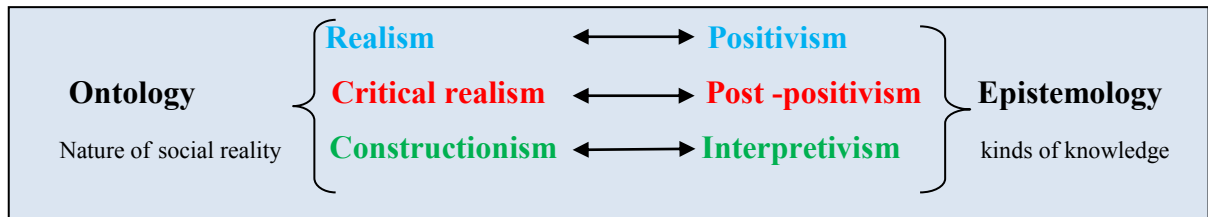
### **3.1.1 Research Domain: Research philosophy**

Denscombe (2010) analysed the research philosophies within social sciences by reference to the concepts of ontology and epistemology. Ontology refers to the nature of social phenomena and the beliefs that researchers hold about the nature of social reality. Epistemology refers to the ways that humans create their knowledge about the social world (Denscombe 2010). The main philosophical positions in social research are Positivism, Interpretivism and Post-Positivism.

Denscombe (2010) stated that Realists regard the social world as something that exists ‘out there’, an objective reality which is not dependent upon the researcher. Scientific methods are used to gain this knowledge through observation and measurement, construction and testing of hypotheses to research social reality (Denscombe 2010, Braun and Clarke 2013). The problems studied by Realists reflect the need to identify and assess the causes that influence the outcomes that are found in experiments. Ideas are reduced into manageable themes or categories in order to test the hypotheses or research questions. The knowledge observed and measured is the objective reality that exists in the world. These theories are tested, data collected and refined to gain understanding of the world (Creswell 2014).

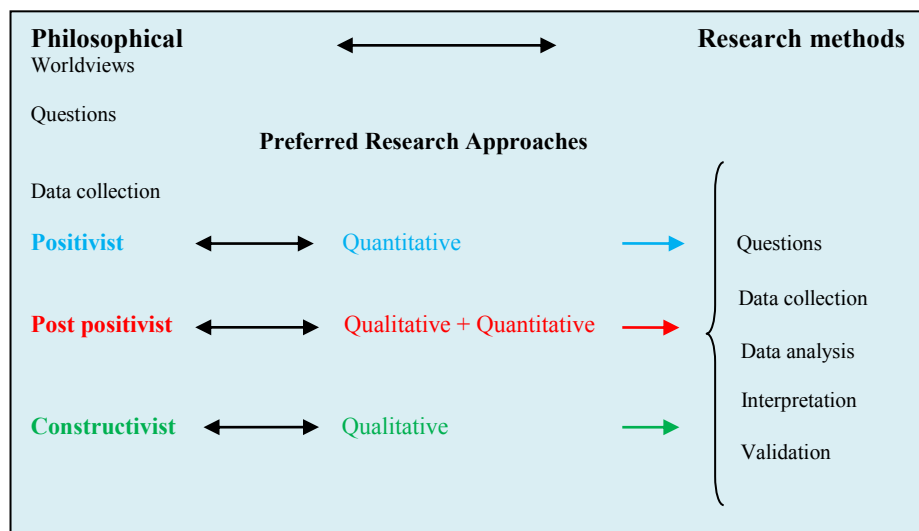
Positivists regard the objective reality as knowledge gained through the scientific method so that the researcher influence can be ruled out. Post-positivists acknowledge that the role of the researcher cannot be eliminated from experiment; particularly when focus has been on human activity. Consequently, human factors linked to researchers cannot be ruled out.

Interpretivism refers to realities which are socially constructed. Interpretivists or constructivists regard the social world as creations of the human mind. Reality is constructed by people’s perceptions and re-enforced by their interactions with other people, through every day actions and requirements. Therefore, knowledge about reality is produced rather than discovered (Denscombe 2010). These philosophical positions are outlined in Figure 3.1 below.



**Figure 3.1 Adapted model of basic social research philosophies**  
Source: Denscombe (2010:118)

Creswell (2014) places philosophy in a framework that consists of the philosophy position, the research approach and the specific method. The interaction of these components is explained in Figure 3.2 below. The point to note is that research methodologies are never independent of philosophical worldviews.

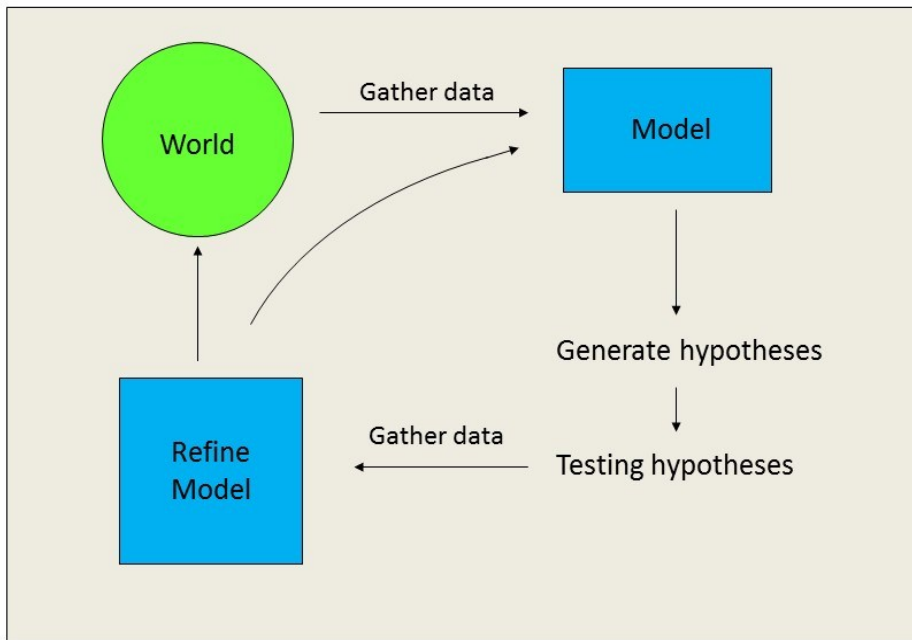


**Figure 3.2 An adapted framework to research**  
Source: Creswell (2014:5)

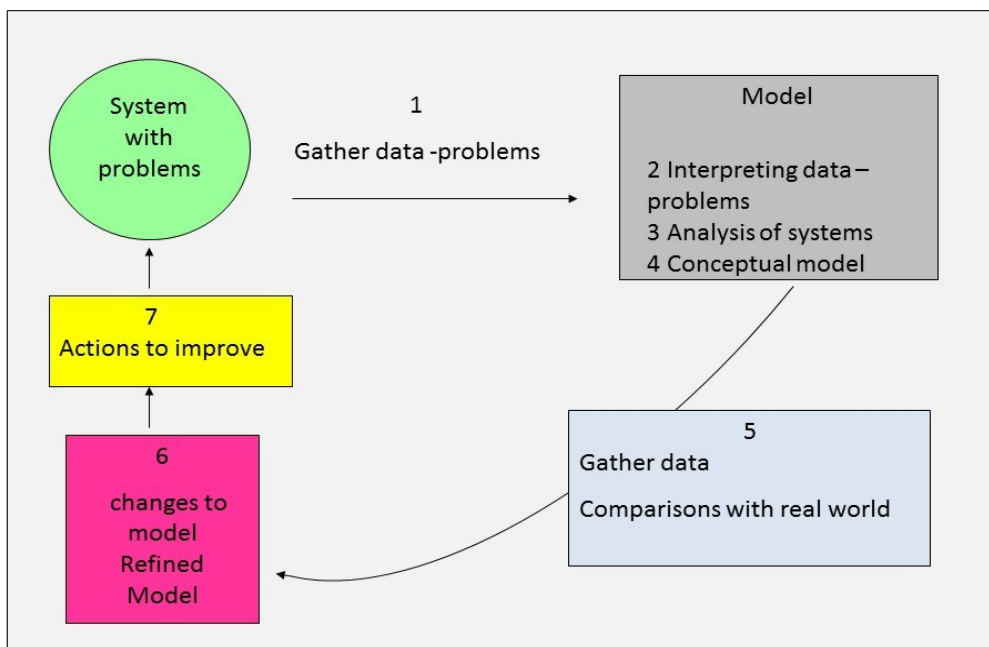
In this research, the philosophy of post-positivism is adopted using critical realism as the conceptual framework, using a qualitative approach because from the literature and the researcher's experience the issues do not lend themselves to quantitative analysis.

Critical realism has transformed positivism by recognising the socially constructed world occupied by the designers, the buyers and the trend forecasters. Social reality is complex and not necessarily revealed by things that can be measured and observed. Critical realism develops theories as cautious propositions rather than perfect and complete explanations of how things work. Data analysis can be improved upon, for example, with the passing of time and the introduction of new technologies, the social reality is likely to change and theories must be updated (Denscombe 2010). Consequently, since critical realism retains the concept of an objective realism, research methodologies utilise the scientific method.

The positivist philosophy adopts a scientific method to find objective knowledge which relies upon hypotheses and testing for qualitative research. This scientific method is shown in Figure 3.3 below, which illustrates gathering real world data to design a model, generate hypotheses and testing these hypotheses to refine the model. This scientific method is adapted in Figure 3.4 below, for the human system, soft systems methodology (SSM) developed by Patching (1990). Comparisons can be seen between the scientific method in Figure 3.3 and the human system in Figure 3.4 below. This system illustrates gathering real world data to analyse problems which is used in this research. The data is interpreted within this system into a conceptual model. The data is compared to the real world, tested and refined, with the opportunity for actions to improve the model within the system, as in the scientific method in Figure 3.3. (Further discussion of SSM is in section 3.8).



**Figure 3.3 Scientific method**



**Figure 3.4 SSM (human system) compared to a scientific method**  
**Stage numbers 1-7 are taken from Patching (1990)**

### 3.1.2 Methods of data analysis

Critical realism allows the researcher to analyse social phenomenon in terms of cause and effect. Multiple causes of phenomena and their effects can intertwine and not always be observable. For example, in this research, cause and effect are illustrated in rich pictures through the tools of SSM for the challenges faced by the trend forecaster within a trend forecasting agency. Linked cause and effect are set out in Table 3.1 below.

<b>Cause</b>	<b>Effect</b>	<b>Figure</b>
<b>Fast fashion</b>	<b>Trend forecasting agencies / Fashion product development</b>	
Increasing demand for quick response for trends for the fashion industry	Forecasters come up with new trends for styling more frequently	Rich Picture <b>5.6</b>
More online trend agencies emerging	More competition for existing trend agencies	
Increasing demand for quick response for fast fashion from the industry	Great pressures to reduce traditional production times / lead times	Rich Picture <b>5.7</b>
Conventional timing of seasonal fashion events	Does not fit in with unconventional timing of fast fashion	

**Table 3.1 Data analysis cause and effect**

Critical realism here moves away from positivism by casting doubt on the idea that careful recording and measurement of observable traits can provide indications for understanding social reality. Therefore, researchers should not rely on observations at surface level to provide them with all the necessary information in order to arrive at the conclusions or theories about the phenomenon. What can be observed on the surface needs to be interpreted. The data is not self-evident, but requires the construction of theories about what is going on under the surface. The theories can then be tested against how well observed events are explained and can be compared and evaluated (Denscombe 2010). For example, in this research, initial theories were related through SSM concerning the designer's use of the trend forecasting in the product development process. This data was used to build conceptual models. The models were then tested by personnel in the fashion industry for accuracy and then revised by the researcher to become the proposed new models. The activities, relationships and timeframes of how companies conducted the product development process were illustrated. The above discussion is conducted with

qualitative data, and so this research focuses on qualitative data because the goal is to understand ‘the way in which people shape the world’. This kind of data is suited to gaining an understanding of human activity and social phenomena (Denscombe 2010). Individuals strive to understand the world in which they work and they seek and develop subjective concepts of their experience, meanings directed to objects or things. These meanings are varied, leading the researcher to look for complexity of views rather than narrow concepts. Trend forecasting is a subjective concept. Therefore, questions asked were open-ended so that the interviewees could construct the meaning of the situation. There is commonality of approach with social constructivism (Creswell 2014). Hammond and Wellington (2013) described constructivism as meaning constructed critical and reflective practice, where the researcher recognises their own background which shapes their interpretation based on experience. This is where social constructivism overlaps with critical realism, as it requires the researcher to raise questions from their own insights, in this case the researcher’s personal experience of working within the fashion industry. This allows further development of concepts and the exploration of their relationships, giving justice to the social constructed nature of the trend forecasting process. The data analysis for this research enquiry is set out in Figure 3.5 below.

<b>Purpose and aims</b>	What is the research trying to achieve?	<b>Exploratory research</b>	How will the outcomes of the project address the initial purpose of the research?	
<b>Design</b>	<b>Strategy</b>	Which approach best meet aim?		<b>Case studies</b>
	<b>Layout</b>			
<b>Philosophy</b>	What are the underlying assumptions?	<b>Epistemology</b> <b>Ontology</b>		
<b>Method</b>	What will be included in the study?	<b>Sample</b> - selection of retailers		
	How will data be collected?	<b>Interviews</b> - Trend forecasting agencies and retailers for seasonal fashion and fast fashion		
<b>Analysis</b>	How will data be interpreted?	<b>Qualitative data</b> - process mapping, SSM		
<b>Evaluation</b>	What confidence in the findings?	<b>Check reliability / validity</b> with industry professionals		
<b>Outcomes</b>	End product of the research?	<b>Proposed models</b> for the use of trend forecasting in seasonal fashion and fast fashion		

**Figure 3.5 Research design and the process of enquiry**  
**Source: adapted from Denscombe (2010:111)**

According to Creswell (2014) the qualitative researcher inductively develops a theory or pattern of meaning from data collected in the field. In order to readily identify these patterns the data should be condensed into selected categories (Saunders *et al.* 2012). The



advantage of the inductive approach allows for maximum of quality or 'fit' that develops between data and theory i.e. the theory is 'grounded in reality'. Within this research, induction was used in the formation of the case studies, where interviews were conducted with personnel in the fashion industry. Key themes and categories were established from the literature and from personal experience. These key themes and categories were used to construct questions for the semi-structured interviews. The interview responses gave substance and content to the themes and categories. Data gathered from the interviews was recorded into the process maps.

Within the interviews for the trend forecasting agencies, the question themes were based on the key themes and categories established for these semi-structured interview questions, into which the response data was fitted. The same set of questions was repeatedly asked during the research process. The process map data was interpreted and illustrated into rich pictures using SSM for stages 1 and 2 of the system. In stage 1, the unstructured situation identifies the challenges facing the trend forecasting agencies, and in stage 2, these challenges are expressed in rich pictures. Interpreting the data from the interviews using rich pictures is a creative solution within the SSM conceptual framework. The rich pictures are part of an induction process, where the roles and creativity of human agents emerge through the rich picture format. Induction was needed prior to stage 1 in the gathering of data and in stages 2, 3 and 4 to develop the conceptual models. (Refer to these stages in Figure 3.4). These data were instrumental in establishing the research aim, to further develop the knowledge base of the trend forecasting discipline.

In deductive enquiry, the basis for the hypothesis is being tested (Hammond and Wellington 2013). Deduction involves the development of a theory that is subjected to a rigorous test through qualitative data (Saunders *et al.* 2012). For example, deduction in this research is deduced through interviews with industry personnel. (Refer to stages 5, 6 and 7 in Figure 3.4). The interviews conducted with the UK retailers, the users of trend information included buyers, merchandisers and designers. The data gathered for this research from themes and categories which had been established in the process mapping, determined how designers used trend forecasting information in the product development process. The retailers' case studies constantly required that comparisons can be made to establish any common areas of practice within the retailers, and commonalities or anomalies associated with how the trends were used in product development process and

their influence on the supply chain and critical path. This data was instrumental in establishing the research aim, to analyse the role of trend forecasting within the current product development processes. This would also contribute to designing and evaluating taxonomy of models relating to theory and practice of new product development and trend forecasting.

In this research, SSM is applied to understanding how trend forecasting is used in the product development process. SSM is the tool used for analysing human activity systems and is designed for creative thinking and practical situations. Each stage within the system can be returned to, to re-assess and improve the situation for clarity. For example, in stage 3 of SSM the root definition is used to develop the research data through iterations to refine the data for stage 4 of SSM. Stage 5 is moving from the conceptual world into the real world. The worldview is how a system is perceived from a particular viewpoint. Initially, the literature was used to determine the worldview followed by discussion with industry personnel (designers and buyers) to develop the conceptual models.

The interpretation of the data into the functions of the product development process models through SSM. The conceptual models were used as a template to determine if there were any mismatches between the actual situation and the model. This was achieved by interviewing fashion industry professionals to test and validate the models. The feedback and suggested changes from industry professionals enabled the models to be refined to the ideal state for stage 6 of SSM. (Refer to stage 6 in Figure 3.4). The development of the revised models uses deduction through this rigorous testing. Confirmation of the amendments for accurate interpretation of the models from the fashion industry professionals validated these proposed models for stage 7 of SSM. (Refer to stage 7 in Figure 3.4).

### **3.1.3 Reliability: Issues relating to interviews**

Reliability expresses the reproducibility and repeatability of results. Wisker (2008) and Denscombe (2010) state reliability should be consistent in measurement. In this research, data emerge from interviews in stage 2 of SSM and the researcher was searching for

consistency in ‘measurement’ of process parameters. An example of consistency is illustrated by:

- Interview data gathered from the fashion industry professionals and the re-interviewing of these same respondents, (retailers), observing how the same event is described within different roles, (buyers and designers) and triangulation of investigators (comparing responses from interviews, in the context of open-ended questions covering the themes on the trend forecast, the product development process and the supply chain).

Research is considered to be reliable when one case can be compared with another, through repeat interviews with the same kind of respondents. Questions which address similar themes should be answered in constant and similar patterns. This generalisability leads to reliability, in that if another researcher conducts the same research activities, they would be likely to replicate the model or findings, although they need not be identical. They could feed the findings into their own research, build on it and generalise from it Wisker (2008), Denscombe (2010) and Hammond and Wellington (2013).

The search for reliability underpins the argument for triangulation, which draws information from two or more sets of evidence (Denscombe 2010, Hammond and Wellington 2013). In this research, the literature review and the interviews will be used and triangulated through SSM. Webb *et al.* (1966), Bryman and Bell (2007), Denscombe (2010), Hammond and wellington (2013) and Creswell (2014) described triangulation as a measure of concepts, where more than one method would be employed in the development of measures, resulting in greater confidence of findings. This is to counteract the criticism of using qualitative research, such as low generalisability, or of using quantitative research, in that there is a lack of in-depth data. (Refer to Stage 4 the ‘reliable’ model in Figure 3.8).

### **3.1.4 Validity**

Hammond and Wellington (2013) and Wisker (2008) stated that if the methods, approach and techniques really fit in with and measure the issues one had been researching, then the findings are likely to be valid. Denscombe (2010) stated that validity refers to the quality of the data, which accurately reflects the concept for the investigation. Validity concerns

the real-world relevance of the questions asked, the data collected and the explanations offered (Creswell 2014, Hammond and Wellington 2013). The quality of the data is reflected in the relevance to reality (Denscombe 2010). For example, in this research, patterns were observed in the product development process concerning:

- the roles and responsibilities of the buyers;
- the omission of the designer's role and;
- lack of trend forecasting usage in product development process.

Refer to Figure 3.8 for stage 6, which validated the model, where the systems world maps onto real world.

In this research, validity is illustrated by:

- Interpreting the same data from professional practice, perspective and testing. Models had been designed conceptually from themes in the literature and interpreted through SSM. The models were shown to the industry experts to be tested for real world relevance. These models represented stage 5 of SSM, where comparisons are made between the real world and that of the systems world.

According to Hammond and Wellington (2013), trustworthiness has become a term used within qualitative research to describe the strength of the claims to the knowledge the researcher is making. A trustworthy account is one that is confirmable, credible, transferable and dependable. Confirmability is generally taken as a measure of how well the findings are supported by the data in this research by participant validation. Credibility is related to confirmability. Credibility is enhanced with prolonged engagement with participants. For example, in this research the revised models were taken back to participants in the fashion industry to be tested for accuracy, providing the opportunity for comment and feedback on findings. The potential root for changes gives relevance and reliability to the models. Transferability refers to the degree the findings can apply beyond the bounds of the project enquiry. Dependability considers data analysis and theory, where the steps could be repeated by another researcher (Hammond and Wellington 2013). For example, in this research SSM is used for interpreting the data. Here the real world maps onto the systems world, showing patterns and relevant matches illustrating a valid model.

### **3.2 The theoretical framework for SSM**

SSM is made up of seven stages which can be used to interpret a problem. The system allows the researcher to move through the individual stages of the system and has the facility to be able to go back at each stage and re-examine it and make any necessary changes. SSM can be interpreted into a flow chart or a rich picture format. The format is down to the discretion of the researcher and the type of subject being analysed. SSM was used for stages 1 and 2 of this system for interpreting the problems identified for the trend forecasting agencies. The 'soft' or 'unstructured' situation of the problems identified in the trend forecasting agencies based on intuition, is suitable to be interpreted into rich pictures, illustrating the richness of the problems. It was not necessary to take this model any further than stage 2 because this information is only setting the scene for the researcher to understand how the trend forecasting process works in a trend forecasting agency. SSM was used for stage 3 to 7 of this system for developing the retailer's case studies into a conceptual model for seasonal fashion and a conceptual model for fast fashion. When the research moved forward to the model building for the retailers' case studies, the situation being described was much more complicated and 'structured' therefore a flow chart was a more suitable format for the interpretation. SSM enabled the researcher to understand the situation being analysed quickly and provided a place for experimentation with the data to conceptualise a structure to an unstructured situation i.e. planning the trend forecasting process sequence of events.

### **3.3 Justification for using SSM**

Patching (1990) defined the aim of SSM as a learning curve, a tool to assist the researcher better understand a problem, assessing it and improving the system. The model is neither right nor wrong it is a representation of how it could be in reality. SSM has been used for creative problem solving or real life practical situations, such as business models providing an alternative method where structured data is not used. This methodology is being used because it has become a widely used tool for investigating and understanding human activity systems (Cassidy and Cassidy 2012). SSM has been successfully applied before for colour forecasting by Diane and Cassidy (2005) and therefore provides a good reason

to use it again for trend forecasting. This research illustrates the application of this system to design models for the trend forecasting process. This methodology was used to examine the weaknesses in the trend forecasting process for product development with a view to making improvement.

### **3.4 Qualitative approach to data analysis**

To develop the knowledge base of the trend forecasting discipline primary research was used. The case study approach was useful to this research because it provided the realistic viewpoint from the industry professionals. Interviews were conducted with the trend forecasters from the recognised forecasting agencies Promostyl, Mudpie, Stylesight and Trend Bible, who represented a cross-section of the larger trend agencies. Their opinions were obtained because of their experience in dealing with cliental in the fashion industry. The trend forecaster's role and skills were analysed to determine how the fashion trends were built to form the trend package, which is sold to the fashion industry to a structured and rigid timescale. The questions were based on the following themes:-

- **Trend forecast** / how data is collected to build the trends
- **Process model** / the sequence of events leading up to producing the trends package
- **Timing of trends** / effect of quick response, alternative trend influences i.e. celebrity influences.

The questions can be viewed in appendix M. The data collected from the interviews was used to establish how the trends were developed to produce the trends packages for industry and identify any issues for the trend forecasters during this process. The problems for the trend forecasting agencies are shown in chapter 5 in section 5.4. This data contributed to creating a theoretical model for trend forecasting in a trend forecasting agency. The individual models can be viewed in appendix A to D for Stylesight, Mudpie, Trend Bible and Promostyl. This model was later referred to a senior trend researcher from a trend forecasting agency 'Trendstop' who recognised the specific details as most appropriate in the industry. The model can be viewed in appendix E.

The primary research interviews conducted with the trend forecasting agencies probed the effect of the risk factor involved in trend prediction (who relied on their intuitive ability for

trend prediction) for missing or a mismatching of the trends with reality. The effect of how these Problems have filtered down into the fashion industry, the primary research interviews conducted with the designers and buyers explored what mechanisms were used to manage these problems of supplying trends more frequently, how they dealt with the increased risk factor of trend prediction and whether there was any formal method of measuring the success rate of trend forecasting.

In regard to the trend forecasting agencies it was found in published literature there is lack of information about how the trend forecasters develop the trends and the sequence of events that takes place when producing the trend package within the trend forecasting agency. Important issues affecting the trend agencies are not referred to by authors such as, the effect of quick response and fast fashion on trend forecasting. It was essential to establish the timeline differences in relation to fast fashion and if this conflicted with the traditional calendar of set fashion events for trend forecasting. This interview enquiry provided the foundation for the current level of knowledge from the trend forecasters not available from current research.

The research then moved forward onto how trend forecasting was used by fashion industry personnel, such as designers and buyers in manufacturing and retail, when planning the garment range in the product development process. The issues identified by the trend forecasters were probed further with the buyers and designers in respect to the:-

- **Trend forecast** - how fast fashion affected the seasonal trend pack
- **Process** - quick response issues
- **Timing** - for seasonal and fast fashion

Interviews were conducted with members from the buying team from a combination of seasonal and fast fashion retailers. The seasonal retailers included Tesco, Shop Direct, Matalan and River Island. The fast fashion retailers included H&M, ASOS, and Primark. These case studies provided the understanding as to how the trend forecasting services were incorporated into the product development process. The questions evolved from the themes discussed in the literature review concerning:-

- consultation meetings and planning stages that take place within this process;
- relationships and communication channels
- product lead times and product buying cycles

- timescales for new trends

The data collected from the interviews was recorded in a process map format for the individual retailers. This information contributed in the construction of the conceptual models using SSM. The conceptual models were tested in the design and buying sector of the industry for real world appraisal and validation. They were shown to the buyers and designers from the seasonal retailers Mexx, Bench and Puma and the fast fashion retailers Boohoo and ASOS. The purpose was to establish:

- whether the model is a realistic interpretation of the use of trend forecasting when designing the garment ranges;
- if trend forecasting was used at the correct levels in the model;
- what percentage weighting was ‘open to buy’;
- how the ‘open to buy’ process was facilitated;
- if this model represented a realistic timeline;
- whether any amendments were necessary for improvement, and
- if there were any omissions or discrepancies between the model and their methodology.

The questions asked about the conceptual models can be viewed in the appendix O. The conceptual models can be viewed in chapter 7 section 7.1.8. Any amendments were implemented into the models from the feedback obtained from the interviewees. These revised models were taken back to the interviewees for confirmation for the accurate interpretation of the amendments implemented. The question enquiry concentrated on confirming:-

- whether the trend pack is represented in the correct levels in the models
- if the personnel involved are represented correctly in the models
- whether ‘open to buy’ is accurately represented in terms of the process, timeline and trend forecasting used
- whether the timeline was realistic for both seasonal and fast fashion
- if the fast fashion range was accurately represented in the fast fashion model
- whether the terminology was appropriate and correct
- if there were any stages / levels not represented



The revised models can be viewed in section 8.4 for seasonal fashion and 8.5 for fast fashion. Once the confirmation was received from the interviewees these models became the proposed new models.

The primary research questions conducted with the retailers probed where trend forecasting was used when planning the garment ranges for seasonal and fast fashion from the designer's as well as the buyer's point of view. It was necessary to determine how decisions were made by the buyers and designers when building the garment ranges and who took the lead on making these decisions. There is lack of essential description regarding the range planning stages in any product development models, the designer's role is not included and the design process is not recorded. The interviews conducted with the buyers and designers enabled the conceptual models to be developed from a more balanced viewpoint because currently any models appear to concentrate only on the buying functions in the product development process. The primary sources were selected in order to discuss these areas in order to provide the precision detailed information which currently there is no recording of in published literature when developing the garment ranges in the product development process. The benefit from interviewing industry personnel is that it links process with practice for product development in the fashion industry.

The primary research questioning delved into how collaboration with the designer and buyer affected the decision making in product design. To address how the fashion industry deal with this problem the primary research learned how trend forecasting worked in conjunction with quick response issues and found out what the criteria was for dealing with quick response issues is their supply chains. It was necessary to identify the procedures for the 'open to buy' policy because these are not recorded down in any current models or the timeline referred to for seasonal fashion or fast fashion. The primary research questioned the varying timescales that are used when planning the ranges and examined how the constant demand for new product ranges effects the seasonal planning cycle. Comparisons of the timescales and process used within the design and buying sector of the industry were drawn from these interviews and used for the models creating a significant contribution to new knowledge for the product development.

One model will not fit all situations in the product development planning cycle and models by current authors are not representing fast fashion due to this rapidly developing area within the fashion industry. Authors such as Brannon (2011), Keiser and Garner (2007), Hines and Bruce (2007) and Easey (2009) do not propose any answers to illustrate these problems in their product development models. Models including recording the design process have not been published before. These new models will contribute to understanding the application of trend forecasting in contemporary design, marketing and retail environments in a more detailed format than currently exists to benefit the fashion industry for seasonal fashion and fast fashion.

The qualitative data recorded in the variety of interviews has not been presented before. The richness of information extracted provided the difference from any previous research in this area by focussing on the interaction of key personnel, specifically the trend forecaster, the designer and the buyer. Trend forecasting was sited within the seasonal and fast fashion supply of garments. In developing these models it fulfilled important criteria currently not the case with previous studies. The question themes discussed with the interviewees created a new body of knowledge in the interpretation and the content of the models. The differences in the timescales and planning stages were identified and implemented in the models for the seasonal fashion and fast fashion. When during the season, the 'open to buy' policy is facilitated was identified in the seasonal model. Fast fashion is actually 'bought-in' fashion was established in the fast fashion model. This information is not mentioned in the current literature.

### **3.4.1 Pilot study**

A pilot study was undertaken with a buyer from the menswear buying department from a major supermarket chain to establish a critical path for product development. The first section of the pilot questionnaire opened with questions relating to trend forecast. The purpose of questions 1 to 3 was to discover if companies actually used trend forecasting services in the product development process, how effective it was and if the company recorded the forecasts success rate. Questions 4 to 9 were concerned with who the company used for trend forecasting, how this information was translated into building the

garment ranges and the communication channels for decision making was facilitated. Questions 10 and 11 were related to how fashion forecasting worked in conjunction with quick response issues in the supply chain. The main reasons for asking questions 12 to 17 was to determine how companies viewed themselves against the competition in forecasting successful product ranges and to identify how this process was managed. The next section of questions 18 to 21 related to the supply chain. These questions concentrated on who dictates on the trend selection in the product development process, the communication and collaboration within the supply chain and the implications of fast fashion for product development. The last section of questions 22 to 27 related to the process model, to establish timescales involved for range planning in product development process and whether there was one model or a series of models implemented for product development. These questions can be viewed in appendix N.

### **3.4.2 Strategies to finalise the enquiry**

This final version of questioning consisted of the following changes made to improve upon extracting key information because the analysis drawn from the result of the pilot interview was that there were too many questions over all. Therefore the number of questions was reduced in the final questionnaire because the large number set in the pilot was considered to be over facing for professional personnel, who had a limited time to respond in their demanding business schedule. It was observed that if interviews were conducted via email too many questions would result in loss of interest and lack of a reply. The main reduction of questions was conducted in the trend forecasting section in order to improve the focus of the questions. Therefore questions 6, 7, 12, 17 and 20 were removed for the final questionnaire. These questions were chosen because there were similarities between questions 6 and question 4, question 7 and question 8 and question 12 and question 2. Question 17 was removed because on reflection this subject was not considered a priority aspect for this research and question 20 was removed because it was covered in question 2. Some of the other questions were found to be either repetitive or over complicated by containing too many descriptive words and options to focus on. This applied to questions complicated 18, 23, 26 and 27.

The supply chain and the process model sections were scaled down focussing more on collaboration regarding the supply chain and the production timescales. This knowledge would provide an in-depth understanding of the subject matter and used to establish a current model/s for trend forecasting. Question 23 had the wording changed from ‘sector’ to ‘garment’ in the final questionnaire for clarification of meaning. This became apparent when the interviewee found the question confusing to answer. Question 26 and question 27 were combined to form one question in the final questionnaire following a more logical sequence. This question was completed by asking for a series of critical paths for various garment types to compare timescales for product development.

In order to facilitate reducing the number of questions the following questions from the pilot were used in the final questionnaire as probes. These probes provided the opportunity to ask for examples or evidence for particular points (Rubin *et al.* 2005). Question 3 became a probe for question 2 to determine if the buyers do actually measure predicted sales in any way, by asking for actual garment examples for evidence of the success rate of trend forecasting. A further probe was added concerning roles and stages for range planning for clarification of the product development process. Question 5 became a probe for question 4 designed to determine if the buying team collaborate effectively, who was involved in the decision making on trends and styles selected for the range and where celebrity fashion fitted into their product development strategy. Question 14 was similar to question 2 therefore became a probe for question 2 and question 20 was better aligned to question 1 therefore became a probe for question 1. The main themed sections of the trend forecast, supply chain and process model remained the same in the final questionnaire. The final questions can be viewed in appendix O. During this study there have been a number of ethical concerns that the researcher had to address.

### **3.4.3 Ethical issues**

The researcher addressed ethical issues prior to commencement of all interviews. The purpose of this research was explained fully to the interviewees before conducting the interviews. The consent was discussed verbally when conducting the face-to-face interviews or telephone interviews and for email, consent was taken using a document that had information about the sensitivity of the data collected. The respondents were made

aware that they have the rights to withdraw from the interview at any time without giving reasons. The researcher also assured that the information obtained would be kept confidential and used only for educational purposes and would not be published without prior consent. The reason for the Anonymous (Anon) being used in this study is because when providing feedback at the time formal clearance was not given. The letter of introduction and outline of research can be viewed in appendix Q and R. In the final phase of this research where the process models were discussed with industry personnel, a form was presented for signing to validate the models for a realistic interpretation. An example of this can be viewed in appendix Z. Confidentiality was discussed in terms of the outcomes of this research as previously explained.

### **3.5 Semi-Structured Interviews**

The interview approach allowed the researcher to meet face-to-face with personnel who are experts in the relevant field of research. The strength of the face-to-face interview is the 'richness' of the communication that it provides (Gillham 2000). The 'richness' applies to the interviews containing many ideas and themes and the 'unravelling' of them by the researcher in gaining description and detail, often those not anticipated at the beginning of the study (Rubin *et al.* 2005). The main questions provide the scaffolding to the interviews ensuring that the research problem will be thoroughly examined and that each part of the broad subject will be explored. The main questions in this research are focussed on the broad subject themes of the trend forecast, the supply chain and the process model for exploration.

The researcher selected a style of questioning where the questions will be asked in a systematic and consistent order but allow freedom to deviate, in order to explore beyond the answers of the standard questions prepared (Berg 2009). In questioning about a process it would be logical to ask about the sequence of events in the process and what order or actions preceded or followed (Rubin and Rubin 2005). For example, in the retailer's final questions this is acted upon in questions 6 by inquiring about quick response issues and then in question 7 following onto how this will affect the supply chain. It is important for the researcher to ask for the detail, this encourages the interviewee to provide specifics,

understand the unexpected, what first appears to be a minor concern is in fact important. For example, by asking about the breakdown of the range plan for fast fashion, further detail could become apparent about how this affected the trend pack or the development of the range plan. The detail adds clarity and evidence adds layers and different angles on the subject (Rubin and Rubin 2005). For example, this is achieved in questions 13-17 regarding the process model development stages, the timescales used and sequence of events that take place.

Gillham (2000) states probes exemplify the point that there is a great deal more to interviewing than simply asking questions. Therefore in order to draw out the discussion and gain clarification on particular points, probes aligned to the questions provided the researcher with a way to draw out a more complete story from the subject or elaborate on what had already been answered in response to a given question (Berg 2009). For example, this applies in question 3 regarding building the trends into range planning and further probing roles in decision making and stages in range building. Then in question 11 regarding celebrity fashion influences further probing the effect on supply chain and in question 12 asking about collaboration and then probing about the communication channels between the buyers and designers. Rubin and Rubin (2005) states questions should be designed to elicit nuances which will obtain precise descriptions and highlight subtly of meaning and continue to seek out nuance with follow up questions. For example, this applies in questions 1 to 3 in the retailers final questioning, where the usefulness of trend forecasting is questioned followed by the effectiveness of trend forecasting and finally how trend forecasting is used in range planning.

### **3.6 Case studies**

The case study can be described as an approach capable of examining simple or complex phenomenon in varying units of analysis using a variety of data gathering (Creswell 2009, Yin 2003). Berg (2009) defines a case study as a method of gathering detailed information about a person, group or large organisation which to allow the researcher to effectively understand how the subject functions or operates. In concentrating on a single

phenomenon the intention of the researcher is to uncover significant factors, various nuances and patterns characteristic of that phenomenon.

Gillham (2000) states the semi-structured interview is the most important form of interviewing in a case study as it can be the richest single source of data. The flexibility of this type of interview is a productive research tool and its 'naturalness' depends on clear structure, what the key issues are and what will be best answered in face-to-face interviews. All organisations have their common and unique features. The researchers aim in selecting the case study methods is to identify such features and their interactive processes to illustrate how their organisation functions (Bell 2010). Accessing how decisions are made in an organisation or how the communication network operates in a case study is an extremely useful technique (Berg 2009). The use of a pilot protocol is strongly advocated by Yin (2003) as a tool for ensuring the exploration is following some exploratory theory and the subject is not just meandering through this phase. The importance of the pilot testing is reflected in the themes selected and from the changes made to the questions as already discussed in section 3.4.2.

The literature is referred to for the differences between seasonal and fast fashion, this would define which retailers to be chosen for the individual case studies and identify the criteria for selecting the case to be studied. This can be viewed in chapter 1 in section 1.4. One of the most important strategies for completing successful case studies is to place relevance on theoretical concepts to guide the design and data. These theoretical concepts are useful in conducting exploratory case studies. Preliminary concepts are developed at the outset of the case study to place the case study appropriately to the literature so that information learned from the case study will advance knowledge and understanding of the subject (Yin 2003).

### **3.7 Process Mapping**

Berg (2009) describes concept or process mapping as a technique that allows the better understanding between relationships and ideas. Concept maps allow the visualisation of specific connections between ideas and activities, or connect new ideas to knowledge that already exists about a theory or concept. The concept map requires examining the

literature to gain the knowledge base to be to pick up on themes or concepts. The themes can be organised into a theoretical framework. Themes from the literature discussed in chapter 2 in sections 2.5.2, 2.5.3 and 2.6 focussed the question for the trend forecasters. The themes concentrated on research for the trend influences, the process used for building the trends and the team of people involved in decision making for producing the trend packages. The interviews conducted will provide the background information on factors affecting the trend forecasting agencies. The questions asked of the trend forecasters can be viewed in the appendix M. The process map layout for the trend forecasting agency can be viewed in the appendix AA.

Themes from the literature discussed in chapter 2 in sections 2.1.4 regarding relationships and collaboration in the supply chain, 2.2.1 timescales, 2.2.5 buying cycles, 2.2.7 celebrity fashion and 2.5.1 trend forecasting and product development focussed the questions for the retailers. The data collected from the seasonal and fast fashion retailers interviews will be recorded into individual process maps. The map layout for the retailer's interviews will be sectioned into the concepts of the trend forecast, the supply chain and the process model. These can be recorded into main themes which branch off into relevant sub-sections of each main theme. The maps are represented in the appendix AB for seasonal fashion and AC for fast fashion.

### **3.8 Soft systems methodology explained**

SSM developed by Patching (1990) provides a set of guidelines for examining an organisation with a view to clarifying where improvements may be possible. The emphasis of the system is that;

- It includes systems thinking stages.
- It distinguishes between the real world and the systems world activity.
- Actions taken by the analyst are fact finding.
- A situation can be examined from a number of different viewpoints.
- It establishes a basis for debate with the client about possible changes.
- It has a participative approach.



The system has four categories of system types, natural, designed, social and cultural and human activity systems. The system which benefits the practical aspect the researcher will be pursuing is the human activity system. The seven stages are explained below:-

**Stage 1 - Expressing an unstructured situation**

**What** - Generally investigating the problem - what is the current situation?

**Why** - because there is a vagueness about what needs to be done / or a lack of structure to the problem.

**How** - by the collecting of information

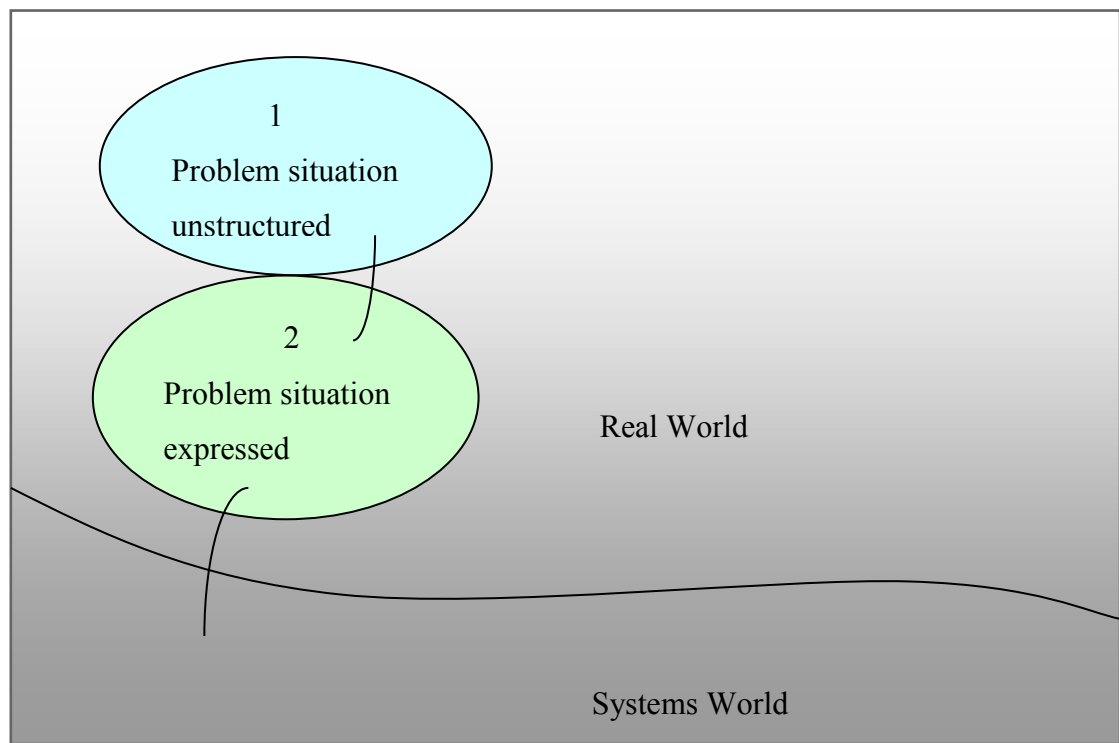
**Stage 2 - The problem situation expressed**

**What** - The situation is expressed

**Why** - because the rich pictures will highlight issues that are relevant to the subsequent systems models and because this reflects the richness of the circumstances being examined

**How** - The problem is expressed pictorially in rich pictures.

Stage 1 and 2 is represented in Figure 3.6 below (Patching 1990).



**Figure 3.6 Stages 1 and 2 of SSM**

**Source: Patching (1990:45)**

### **Stage 3 and 4 - Defining the root / conceptual modelling**

**Why** - Defining a root before the models are constructed. It is necessary to select a viewpoint and then define an appropriate system from that perspective. This is achieved by selecting a root definition.

**What** - The root definition describes what the system is and what it aims to achieve (and the persons affected by it, who are part of it, or could be affected. It also describes the transformation which could be taking place and the environment and influences surrounding this human activity system).

**How** - The CATWOE test is a checklist for the root definition by Patching (1990). This mnemonic is used to ensure all the necessary components are present in the root definition, i.e.

C - Clients or customers of the system, i.e. those affected by or benefit from the outputs of the system

A - Actors who carry out the activities within the system

T - Transformation, i.e. the change that takes place within or because of the system

W - Worldview, i.e. how the system is perceived from a particular viewpoint

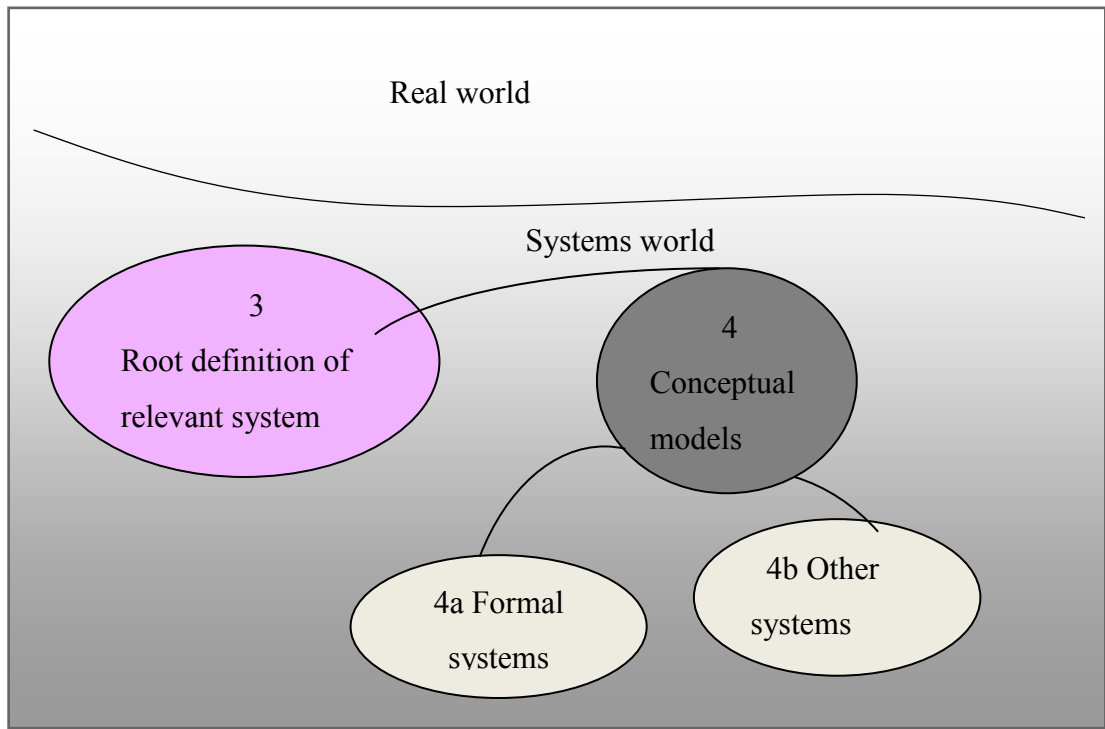
O - Owner of the system, i.e. to whom is the system answerable and / or who could cause it to cease to exist

E - Environment, i.e. the world that surrounds and influences the system, but has no control over it.

The root definition is reflected in the statement/s which defines the initial research. A series of root definitions and associated models could be developed, taking a variety of viewpoints. Each viewpoint will lead to a different model. When used during the comparison stage (stage 5) it will give a new insight into the actual situation. In this research case, comparing the theoretical with reality as in when the conceptual models are shown to the industry personnel for their opinion on their realistic interpretation.

The CATWOE test is another tool used as part of this process, to assist the researcher in the process of constructing a root definition, which may be written and redefined many times before achieving a satisfactory statement expressing the problem situation. This checklist is used to ensure all the necessary components are present in the root definition. This stage represents the opinion of the researcher until the concept is discussed with the

actors (industrial personnel) who are involved already in the situation. Stage 3 and 4 is represented in Figure 3.7 below (Patching 1990).



**Figure 3.7 Stages 3 and 4 of SSM**

**Source: Patching (1990:46)**

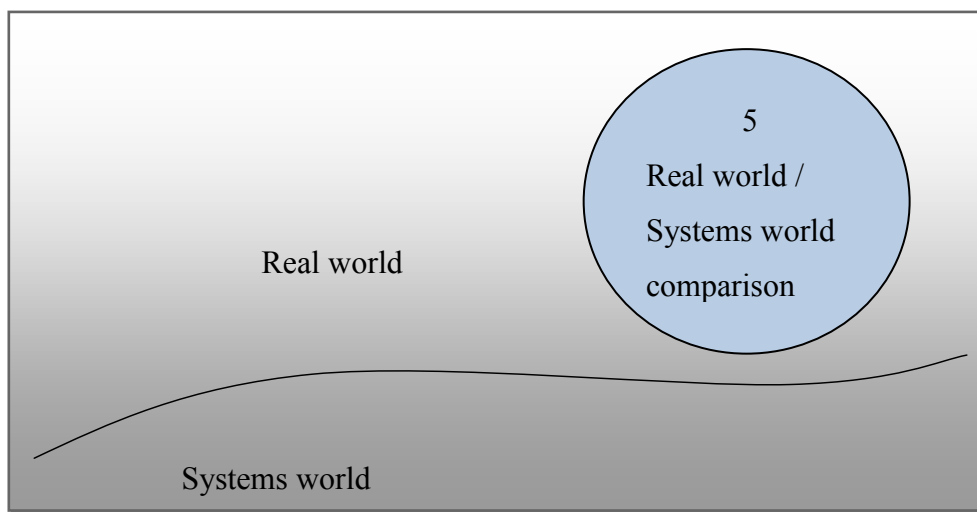
The transformation and the worldview are considered by Patching (1990) to be the most important two elements of the CATWOE test. The recommendation is that the researcher could begin with these elements because they form the basis of the conceptual models, representing stage 4 of this system. The transformation is the change that takes place within or because of the system. The components of the input as well as the precise definition of the output are a priority to working out the transformation. The transformation is represented in Figure 3.8 below.



**Figure 3.8 Patching (1990:17) System transformation**

**Stage 5 - Making the comparison**

The next step is to compare the models with what exists in reality. Crossing the conceptual world back into the real world, the model is used as a template to determine if there are any mismatches between the actual situation and the model. (*Do the activities shown in the model exist in reality?*) At this stage activities that do not appear in the model may be found in practice, therefore it may be necessary to reconsider the root definition and the associated model. This process can be repeated until the researcher and the client (interviewee) is satisfied. Stage 5 is represented in Figure 3.9 below (Patching 1990).



**Figure 3.9 Stage 5 of SSM**

**Source: Patching (1990:47)**

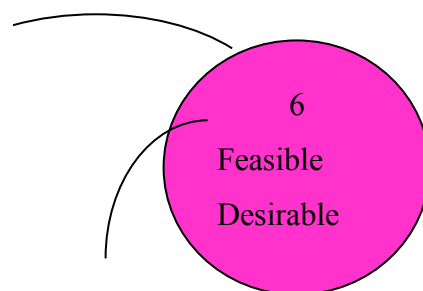
### **Stage 6 - Deciding changes**

The comparison stage should reveal areas of where improvements may be possible. The next stage 6 is to examine each of these possibilities to see if they are feasible and desirable. For example:-

Feasible - culturally in light of views / experience of people

Desirable - inclusion of new activities or strengthening existing ones

Stage 6 is represented in Figure 3.10 below (Patching 1990)



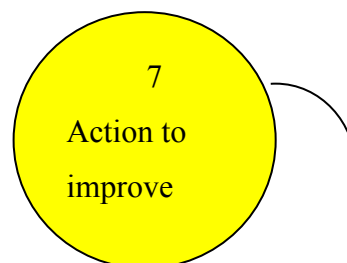
**Figure 3.10 Stage 6 of SSM**

**Source: Patching (1990:48)**

### **Stage 7 - Improvements**

How to implement changes.

The changes implemented into the models provide further refinement and improvement. The revised models at this stage can be validated for desirability of the change or feasibility in light of the circumstances of the organisation. Stage 7 is represented in Figure 3.11 below (Patching 1990).



**Figure 3.11 Stage 7 of SSM**

**Source: Patching (1990:49)**

### **3.8.1 Working with the SSM to develop models from the case studies**

Stage 1 of SSM is identifying the problems for the trend forecasting agencies. The word 'unstructured' refers to the initial perception of the problem in the early stages of investigation. The behaviour of a human is largely unstructured, though certain tasks may be carried out to a prescribed set of procedures, an individual will seldom perform them in exactly the same manner or same speed (Patching 1990). During this stage information would be collected about the structure and processes of an organisation together with views and issues. The interviews conducted as part of the primary research with the trend forecasters examined how the trend forecaster analyses the trend information to create the trends and how the process is managed in the trend forecasting agency.

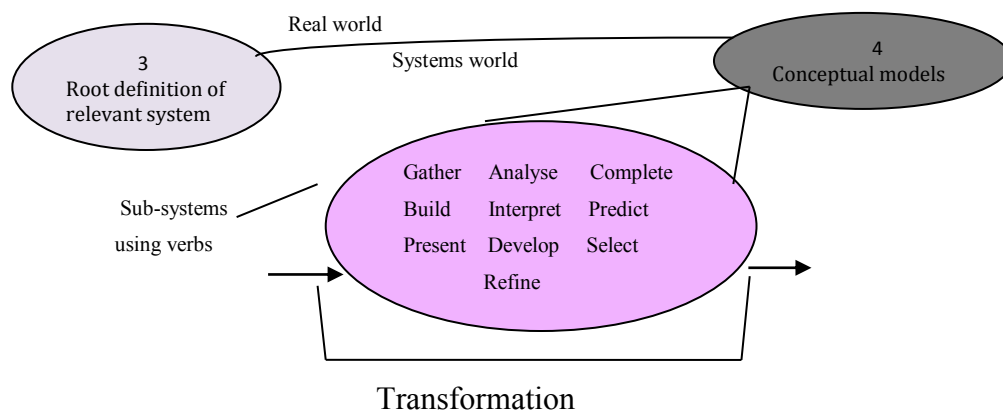
In stage 2 the problem situation for the trend forecasting agencies is expressed pictorially by using rich pictures, so called because it reflects the richness of the circumstances being examined. Rich pictures are cartoon like drawings, used to illustrate the problem to be analysed in a visual format. A collection of these drawings can be produced to give a rich picture of the situation holistically. This holistic picture is then used as a tool to reveal issues and tasks or investigation. SSM was used to visually record the trend forecaster's role, skills and the key sequence of events when producing the trends using rich pictures. Rich pictures were used to clearly illustrate the problems for the trend forecasting agencies. These rich pictures are shown in chapter 5 in section 5.2 and 5.3. The rich pictures representing the problems for the trend forecasting agencies are shown in section 5.4. Once a rich picture has been accepted and constructed the investigation temporarily leaves the real world and the systems phase is entered. This will complete the research phase for the trend forecasting agencies. In the next phase the research moved forward onto how the trend packages are developed in the trend agencies and are used by the fashion industry in product development.

In stage 3 the root definition is reflected in the researcher's statement/s which defines the initial research. In this case, the viewpoint applied to the application of trend forecasting in the product development process. This viewpoint is set out in chapter 7 in section 7.1.2. At this stage, SSM leaves the real world and enters the systems world, where the

researcher defines the most appropriate viewpoint of the situation through the use of the root definition which reflects the aim to be achieved.

The CATWOE test was used to determine if the original root definition variations adequately represented the full requirement of the ideal trend forecasting methodology. This can be viewed in chapter 7 in section 7.1.2, Figure 7.3. In this research case the trend forecasters need to sell and apply supporting data for both seasonal fashion and fast fashion sectors of the market when planning the garment ranges. The missing link is to develop models with trend forecasting information required to meet the required timescales for seasonal fashion and fast fashion. As a result of the test the root definition was modified given in chapter 7 in section 7.6.7.

From the root definition, model/s can be drawn that show the minimum activities that must exist for the system to achieve the standard transformation. The root definition is expressed by using verbs. In this research case the relevant verbs were constructed in a logical sequence of progression for the functions carried out whilst developing the garment range. This is illustrated in Figure 3.12 below.



**Figure 3.12 Adapted from Patching (1990:84) conceptual modelling**

The transformation statement in this research case is a process of continually sourcing data, in a controlled or random manner, simultaneously with thought, decision making and reasoning processes that result in the garment range within varied timescales. The

transformation is fully explained in chapter 7 in section 7.6.3. The world view is that of the designers and buyers employed by the retailers who use the trend forecasting information in the product development who were approached for their opinions. The trend forecasters, the buyers and designers can be referred to as the owners in this research case. The consumer and global influences could be considered as part of the environment.

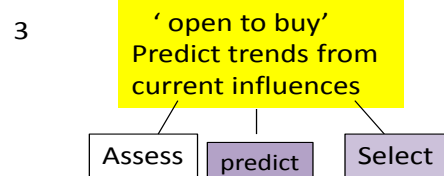
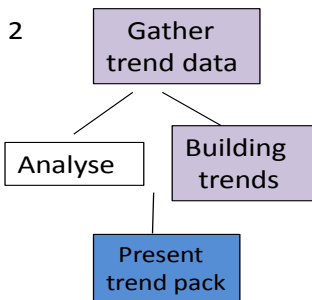
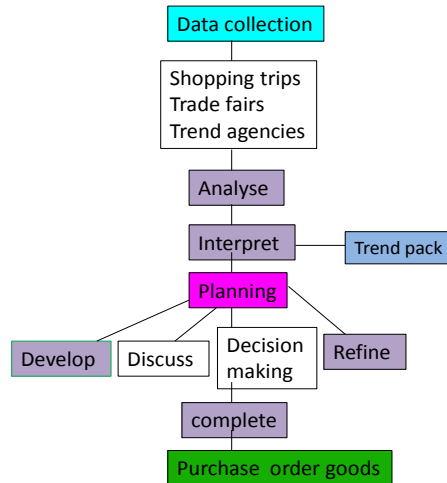
Sub systems can be recognised from using the verbs from the transformation stage. These can be described as the building blocks to developing the models. For example, one sub system is developing the trend package which is part of the product development process conducted by designers and buyers. Other examples representing the requirements to fulfil this stage of the research are the sub systems for the seasonal fashion process, the trend pack development, the 'open to buy' process and the fast fashion process are illustrated below in Figure 3.13.



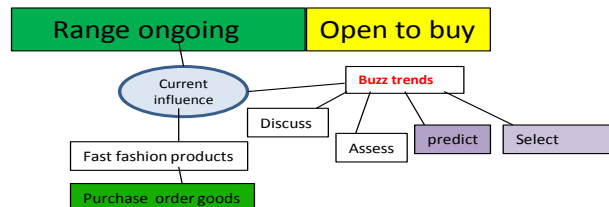
## Sub-Systems

1. Seasonal fashion process 2. Trend pack process 3. 'Open to buy' process 4. Fast fashion process

1



4



**Figure 3.13 Sub-systems using verbs from the transformation stage (Authors own research)**

From these initial models further models can be developed. In this research case a conceptual model for seasonal fashion and a conceptual model for fast fashion. This was achieved from using the primary data from the fashion industry personnel and their validating of the models in accordance with this system. At this stage activities that do not appear in the model may be found in practice, therefore it may be necessary to reconsider the root definition and the associated model. This process can be repeated until the researcher and the client (interviewee) is satisfied. This represents stage 5, the comparisons stage of this system, comparing the theory of the model development with the reality from the feedback fashion industry personnel. For stage 6 in the researcher's case implementing the changes to the models recommended from the feedback by the industry professionals providing further refinement and improvement. These revisions can be confirmed for desirability of the change or feasibility in light of the circumstances of the organisation. These then become the new models representing stage 7, the final stage of the SSM system.

## **Chapter 4: Outcomes from case study evaluation: Trend forecasting agencies**

Trend forecasters from the following trend forecasting agencies were interviewed. Promostyl, Stylesight, Trend Bible and Mudpie. The main criterion being popular companies in the fashion industry, that represented a cross-section of the larger trend agencies. They supplied small companies offering a personal approach, as well as highly commercial value multiples to leading high street retailers in the UK. Collaboration with manufacturers, buyers, designers and merchandisers in the fashion and style industries is also a part of their remit. The selection therefore ensured a wide range of attitudes and opinions from which to draw an even and accurate point of view.

The purpose of the interviews was to establish how the trend forecasting process is carried out in a professional Trend forecasting agency. This includes researching the role and the skills of the trend forecaster and investigating how decisions are made by the forecaster when building trends. The purpose of this was to establish the sequence of events leading to the production of the trend package. The intention being to use this information to develop a model for trend forecasting.

Themes were drawn from the information taken from the literature review and from the results of the trend agency interviews. The data was analysed and the following data recorded:-

### **4.1 Trend forecast: The forecaster's role in identifying and predicting fashion trends**

Participant 2, the trend forecaster from Stylesight states that in order to prepare trend forecasts they have correspondents worldwide and editors who travel to observe trends from a global perspective, as to well as understand the micro local trends that emerges. Often those that begin as 'micro' trends are the seeds of what becomes 'macro' trends. The forecasters are constantly looking at everything including: runway, trade shows, street,

retail, as well as home design, film, art, media, music and other cultural movements. They spot similarities or certain intertwining themes, which becomes a starting point. The minute they can 'name' something, they can start to tell a story about it, visually, it becomes a trend concept.

Participant 4 from Mudpie believes: 'to forecast a trend it is essential to have a good understanding of the present. Where are we now'. This means what is going on in our world today, and what effect does this have on the consumer? For this it is essential to have a good handle on news, current affairs, economics, cultural and creative happenings and socio-economic trends'.

The trend forecaster from Stylesight, (Participant 2) states that trend spotting requires being constantly entrenched in a flow of information. You need to keep yourself open to what others are interested in and influenced by. It is not enough to read magazines and newspapers, follow blogs, visit brand websites, shop the stores, and attend the trade shows. You have to also consider other areas of design, art, culture, economy, finance, etc. You cannot just know the latest runway designers - you must also follow the leaders in furniture and automobile design, packaging, technology, and more.

The trend forecaster from Stylsight (Participant 2) says:

'It is a 24/7 job and designers work with us because they understand that we live and breathe this information. In contrast, those designers are often building line sheets, tracking fabric shipments, working with fit models, approving lab dips, and all the other things that are required to build a collection that trend research becomes a sliver of their daily life'.

However, Participant 3 from Trend Bible looks at electronic packaging and finds out the retail speed of technology they are using along with dry data from the government website such as the demographic groups. Blogs are searched for up and coming designers and new techniques. Social moods and cultural information is also taken into account e.g. Film. Graduate shows are researched for colour and trends. The market place such as flea markets and furniture influences are important resources. Colour professionals e.g.

International Colour Authority research commercial themes and work with clients, designers and buyers. The purpose is to be able to see patterns emerging and pre-empt the social mood.

Whereas, Promostyl along with looking at fabric fairs, designers, architecture, press interests assess the attitudes of the consumers and look for the development of niche markets. Trend Bible add celebrity and consumer spending habits. Stylesight look at street blogs and sales to access if a trend has peaked. Even though all of this cultural, economic and social data is collected they use consumer feedback for back up to assess attitudes.

#### **4.1.1 Timing of a trend**

Brannon, (2011) notes that the trend forecaster must make recommendations based on the understanding of the market place and estimate the timing of a trend and the impact. Participant 4 of Mudpie also acknowledges that the skill is not in gathering and processing the information, it is assessing the likely speed to market which requires an accurate assessment of when that trend, if at all, will be at its most important. If the emerging trend is too accelerated it may not be advanced enough to go in our printed publications and may be more suited to a closer to season trend on our online service.

Whereas Stylesight analyse the runway collections to find emerging silhouettes, and extrapolate from there which ones will impact the season ahead, which ones seem too early, which shapes look old. They look at sales to see if a trend has peaked, or if it still has '*legs*', and as a gauge for where the consumers' mindset is. Sales information helps answer these questions.

Promostyl work to a more traditional time scale of two years ahead commented Participant 5, new trends are required at too fast a pace and there is no time to pause for reflection. Trend Bible put their trends together 18 months in advance. They say retailers are looking to buy twenty months in advance and it is getting earlier.

Participant 3 from Trend Bible says:

‘The nature of home interiors is that it does not change as quickly as fashion clothing. The commercial range is now every 6 months to keep it interesting and appealing. They use accents to update and refresh’.

## **4.2 The forecaster’s skills**

Perna (1987) believes that the fashion forecaster must bring to the job broad knowledge, wide interests, industry experience and other particular skills. A keen mentality will register not only the black and white facts, but also those that have nuances of grey. One needs to write the consumer scenario before the consumer can articulate the desire.

Participant 4 from Mudpie agrees that experience is essential in trend research. As a trend expert their experience is important and valued in the industry, especially expertise in a specific area of trend research, for example, either social or political trends, economical trends, art, music, industrial design or architectural trends. To ensure all areas of trend research is covered, team members would contribute to their particular strengths of expert knowledge.

All the trend agencies interviewed have a combination of in-house professionals and freelance people reporting to them. Promostyl have a marketing person and a creative person working together to complement each other in a team. Trend Bible have an in-house team with freelance professionals reporting to them. Stylesight have large teams of industry professionals from senior management to editors who have experience in design, fashion styling, art journalism, graphic design, textiles and product development.

## **4.3 Process model**

Participant 4 from Mudpie says they have developed a process in-house and it is widely recognised to be the most accurate. The process itself is based on thorough research where

all the information is distilled from 100s of micro trends into three main themes. Participant 4 from Mudpie says no one person makes the decisions as trend research is best done as a collective activity, although the CEO has the final say.

The forecaster (Participant 2) from Stylesight states that working as a team is important, this includes seasoned industry professionals. A team of designers forecast the trends from their Paris Atelier and a team of editors and foreign correspondents create daily content for their site from their New York headquarters. These professionals have spent their whole career in trend. They are known as '*trend aficionados*'; they are living and breathing it, and have a proven track records for '*getting it right*'.

Stylesight look at the senior staff as mentors, accomplished professionals who understand their clients' needs as well as the way the industry works, and who help the less experienced editors shape their findings and communicate trends in a clear, usable and inspiring way. The team has experience in design, fashion styling, retail, art, journalism, graphic design, textiles and product development. They believe in a multi-disciplined, collaborative approach, where senior management, programmers, editors, marketing, sales, '*site geniuses*', (who help clients with any issues navigate our site) and street photographers are all working toward one goal. They all depend on each other, and they want the clients to be part of that collaborative spirit.

#### **4.4 The building of the trends**

Promostyl work two years ahead. The first meetings take place with creative people. These are agents based in New York and Tokyo. They then speak to freelance commercial people. Over a series of three meetings these people organise the information into the newest trends. Presentations to companies are conducted after Premiere Vision.

Stylesight follow the leaders. They look at a constant flow of information. They work with designers and collaborate with clients and pinpoint how the changes in the market will affect the buying patterns of consumers.

Mudpie assess likely speed to market. When the trend will be most important and how trend forecasting is incorporated into the product development process. They add micro trends to the journal and identify items for fast fashion or flash trends. All these agencies have support of people either as teams reporting to them or freelance people. Usually in Paris, New York, Asia etc., agencies rely on main long term trend books with top up trends online.

Trend Bible begin the process starts with a view colour. This is followed by theme identification and then by the establishment of key items / prints. Finally Blogs are researched. Clients are now pre-ordering trend books before deadlines. There is a move forward to look at for the long term. Symptomatic of the recession, they are nervous, resulting in the need for more preparation. Trend Bible develop blogs as well as trend books.

#### **4.4.1 Who uses trend forecasting?**

According to Participant 5 from Promostyl it all revolves around the following people who use them, the press ready to wear, retail department stores, the high street, textile and fabric people. They feed all new trend scouts and expanding markets.

Mudpie forecaster, Participant 4, observes that other industries are better at using trend information than the fashion industry. Marketing agencies, industrial designers and technology companies are all big users of trends and often use information which is very long range. The longevity of the information required is usually linked to the lifespan of the product. Mudpie clients are very commercial, including home interiors, value clients such as Tesco, and Matalan. They have consultancies with Asda, Morrisons and Sainsbury's and with multiples BHS and Primark. Other company examples are car manufacturers Daihatsu, fabric manufacturers Villanova, as well as wallpaper companies i.e. Graham & Brown, beauty companies such as, Avon, and other companies such as Nokia and USA client J C Penney for their pottery line.

Participant 4 from Mudpie reports:



‘Most people do not change their car every 6 months so mid range trends are needed for this which tend to be socio-economic and influenced by longer range technology trends. Inspirations that represent a decade are important touch points, such as architecture. Architecture built today will be defined as 'teens', reflecting the period 2010-2020, and industrial design will follow the aesthetic principles of this period in many ways. The fashion industry uses trend forecasting for planning and building collections, these run in parallel to the fast fashion offer which is much more reactive and close to market’.

#### **4.4.2 Is trend forecasting the driving force of the fashion business?**

Participant 4 from Mudpie states that their customers depend on them. Some companies have small design teams, who are stretched as it is. They do not want to spend time and money on travel. They are essential to those retailers who can afford a budget for two trend books per year.

Participant 4 from Mudpie comments:

‘Trends are important in the fashion industry because they guide designers and help retailers and brands make the right product development decisions. However our universe of consumption has cultivated a retrograde trend for imitation rather than innovation. The result is that trends have been driven very close to market in some sectors which has created 'fast fashion', and the current preoccupation with price is driven by the need to differentiate the identical plethora of products available in every high street retailer. Looking at long range trends is still important as it can help even the fast fashion retailer make an informed decision about which trend to back and enable the buyer to look at the runway or street fashion from an informed perspective’.

Trends feel more dominant now according to Stylesight because their rate of absorption of information is swifter. As one of their executives always says:-,

‘Innovation is about giving people what they don’t yet know they need’.

Participant 2 from Stylesight points out this is exactly what trend Forecasting is all about:-

‘If you can pinpoint how current changes in the market, economy, design, culture, etc., will affect the buying patterns of consumers in the future, you can get ahead of the competition. These types of trends can be very important. If your customer overall is more mass market and not adopting trends as soon as they start to emerge, trends are still important but in a much different way’.

#### **4.4.3 Depth of information available**

Three of the trend agencies interviewed produce trend books covering menswear, ladies wear and children’s wear trends, including junior ranges, sport and street lifestyle, new shapes, fabrics and colour predictions. Mudpie see themselves as being creative with trends, whereas Stylesight see themselves as technically based as in a one-stop industry covering celebrity fashion, denim, interiors, materials and textiles, global street, runway, trade and trade shows on line. Trend Bible concentrate on interiors. They have no on-line service. However they are looking into developing blogs.

#### **4.5 Supply chain: Trend forecasting and quick response issues**

Participant 5 from Promostyl, who was interviewed in 2007, refer to the situation at the time that new trends were required at too-fast-a-pace. There was no time to pause for reflection and this was very stressful. People like Zara and H&M, had a huge team of designers working for them to keep up the pace, in order to address the quick response issue.

Promostyl were trying several ways to address the problem of quick response. Firstly they wanted to continue to develop links with small companies. They liked to work with small companies who felt more secure with a more personal approach, where a good working relationship can be built upon.

Secondly by updating their internet site more often by introducing small products, or a new product, highlighted as a high priority product. This would be a story sold on internet aimed at the quick response client. e.g. fabrics, selected to entice a new line of client called 'boomers' women aged 50-60 years of age who recognise quality and fabric types.

Participant 5 from Promostyl said this line was chosen because the company Imac had bought the Erlangen Fitness Osteoporosis Prevention (EFOP) study. The EFOP study found that the over fifties had been forgotten, now things have changed and this age group are being taken into account e.g. 'lifesavers' classical items to mix with other key pieces. These are described as timeless products rather than throw away. Participant 5 also stated that the department store Le Printemps had worked on an active sports story which had been losing money for three years, concluding, that there is more profit now to be made on luxury brand urban wear, for example jeans (15-25 yrs), by Nike and Puma.

Trend Bible however are less affected by quick response in home interiors as trends do not change as fast as fashion trends. They work on a 6 months turnover, their ranges being core ranges such as bedding and ceramics. There are also seasonal inputs at Christmas such as napkins, paper plates, Easter and high summer for picnic items and top up ranges for a refreshing aspect.

Participant 4 of Mudpie believes there is no such thing as fast fashion unless it is driven by an unprecedented event. Participant 4 states that Trend services cannot predict an unexpected event and often the market forces will 'react' simultaneously without the necessity for trend information. For example, following the unexpected death of Alexander McQueen, Liberty of London set up a window display dedicated to his memory. Consequently, the trend for Alexander McQueen designs accelerated in value and immediately became investment pieces. Retailers at all market levels will respond to this trend with interpretations of his A/W10 collection and the famed 'scull' scarf. McQueen's A/W10 show would definitely have influenced retail. His death accelerated the trend for the McQueen brand causing retailers to copy and profit from his final collection. Outside of this scenario there is no such thing as fast fashion, this could more likely be referred to as 'copying'. The original designer would have followed a meticulous process to develop their ideas to achieve perfection. The same applies to artists in the music industry who

have developed an 'identity' carefully over time. However, you look at it someone somewhere else has developed, considered and created that look long before it arrived on the UK high Street. The equivalent process applies to artists in the music industry who have developed an 'identity' meticulously over time. Therefore, someone someplace has developed, considered and created that look long before it arrived on the UK high Street.

Stylesight address quick response issues with their online format which ensures that fashion and style professionals spend less time preparing to work, and more time creating. Furthermore, Stylesight provide continuous improvement, connecting their customers to a team of technical site experts who are on-call continually, providing support and feedback. They also offer a 'Speed to Market' analysis, where they identify key apparel and accessory items, influences from the runways, streets and trade shows, and interpret them for quick-turn design and manufacturing. Each item is complete with flat sketches, color palettes, fabric and trim suggestions; compatible items that spark a multiple sale are shown on the final page of every report. Participant 2 from Stylesight says 'Speed to Market' is an essential tool in today's fast-paced world.

#### **4.5.1 Main competitors**

Promostyl only had one competitor until 1970, after that about six competitors until 1996, when WGSN, which was instant competition online, was established. Participant 4 from Mudpie says WGSN and Stylesight but they have the highest industry growth. Trend Bible has competitors in USA and Japan but Participant 3 declares not to be in competition with WGSN or Stylesight because they do not have an online service. Their trend books are commercial and straight forward whereas other trend agencies do beautiful trend books, but they are not self explanatory. Stylesight personnel do not comment on competition.

## **4.5.2 Trends directed at specific markets**

Promostyl trends are directed towards the European, American and Asian markets. Specific countries are mentioned with observations made of their strengths and weakness either in design or production. For example, Japan's strengths are specific to the production area. Sri Lanka is strong on pattern technology. China and Asia are weak in design. Taiwan, Turkey and Istanbul have a 'copy' culture and all oriental countries are prone to this culture. Istanbul and Barcelona are popular countries to have a showroom. Replay and Hugo Boss have a showroom there.

Participant 4 from Mudpie reports:-

'Because we are represented in over 50 countries our trends are international. However as a business based in the UK we will always be UK- centric to some extent. As an island nation with 12% of our population foreign born, other cultures are well represented in the UK. Our best markets include the USA, South America and India, Southern Europe and Scandinavia'.

Trend Bible have clients in the UK, America, European, and Japan and Stylesight are a global online agent.

## **4.6 The consumer benefit**

Participant 5 from Promostyl believes that they give back the trends they have developed to the consumer because they have been looking at the influences from the fashion designers when building the trends. Trend Bible collect research on the consumer. They back up where the information is from to the client, so they believe in them. e.g. verify the following points:-

- why the consumer adopts certain spending habits
  - where the information has come from, use past and present data
  - and when will it help brands to decide what consumer wants before they know it.
- They pre-empt the social mood.

Mudpie sell business to business rather than business to consumer. However as a trend forecasting company they help to companies understand the consumer by providing ideas that their customer will feel an emotional connection to and clearly the brand or retailer benefits from this by seeing an uplift in sales, which they say is a good reason for investing in trend information.

#### **4.7 The effect of celebrity on trend forecasting**

Jackson and Shaw, (2009) state that the cult of celebrity is an increasingly important part of some people's lives in Britain. The benefit of celebrity association is being used by fashion brands, e.g. David Beckham for police sunglasses, and Brian Ferry and Twiggy for M&S. Trend Bible observe that the consumer aspires to the celebrity lifestyle. Celebrity ranges have been launched such as the Kylie bed linen range and 3D ceramics. The theme of the moment is the dream of dressing up inspired by Lady Gaga. This theme is interesting because it is holding the consumers imagination. The current recession is dark and conservative and the idea is that entertainment has to be there to escape from reality. Participant 4 from Mudpie gives the following scenario to illustrate the effect of celebrity:-

The Balmain Motorcycle jean from the S/S 2009 and A/W 09/10 collections was seen on the Catwalk, this style since then has been seen on trend-setting celebrities such as Cameron Diaz, Shenaé Grimes and Rihanna. This trend was forecast for mainstream brands, however at \$2000 very expensive and quickly copied by the high street. This means that the whole high street was following the same 'look'. Celebrity fashion and copying becomes something different which is better referred to as 'fast fashion'. At the point where a trend accelerates price and speed to market becomes the focus. This does not affect the underlying trend, if we question why Balmain originally came up with the motorcycle jean. The trend can be observed from research in place; growth in both cycling (up 70% in London over the last decade) and biking (up 6% annually to 2011). City Bike schemes such as Paris were first reported in 2007 and have been well documented. Mudpie published two similar biker jean styles in April 08 (developed A/W 07/08) in their female book as part of the kinetic trend. Balmain would have looked at similar trend information to Mudpie. This is a good example of how this trend appeared to be 'fast fashion' but was actually developed over time by Balmain for the Catwalk.

## **4.8 Summing up of findings**

### **The forecaster's role in identifying fashion trends**

- Mudpie and Stylesight personnel discuss looking at global trend ideas and having a good understanding of what is going on in the world at the present time, such as current affairs, economics, cultural and creative happenings and socio-economic trends.
- Personnel from all the trend agencies interviewed research into all these influences, but have an underlying theme that they look to the consumer sales and spending habits.
- The technique is to be able to see emerging patterns and pre-empt the social mood.

### **Timing of a trend**

- The skill is not in gathering and processing information for the trend but in assessing the likely speed to market, which requires an accurate assessment of when a trend is likely to be most important according to Mudpie personnel.
- Stylsight use sales data to check when a trend has peaked.
- Fast fashion is a problem for trend agencies who work to the traditional trend forecasting cycle of two years ahead and find it difficult in keeping up with the pace of constantly providing new trends.
- Celebrity fashion is an unpredictable aspect for the trend forecasting agencies.

## **Process model**

### **Trend forecasting and quick response**

- Fast fashion was increasing the demand for new trends more frequently and this was affecting the traditional prediction seasons timescale of events. As a result more trend agencies are setting up e.g. WGSN creating more competition for the existing trend forecasting agencies such as Promostyl personnel reported in 2007
- The impact of fast fashion on the fashion trend forecasting agencies means that they are looking at how to react to this phenomenon and are responding through developments and links to industry inside and outside the market sector such as the magazine, hotel, car, paint and cosmetic industries in 2011.
- Trend agencies have an online format for keeping up with the fast pace, called speed to Market, alerting to key items of apparel and accessories. This is a limited section of the total amount of information available.
- Personnel from Mudpie do not believe in fast fashion and refer to it as copying.

### **Celebrity fashion**

- Consumers aspire to celebrity lifestyle.

### **Consumer Benefit**

- The Trend forecasting agency help companies understand the consumer.
- The trend forecasting agencies see themselves as giving the consumer what they want before they know it.

### **Product lead times**

- The current fashion forecasting system is reliant on long lead times. This is not conducive to quick response.



- The rise of fast fashion provides the opportunity to discover if trend forecasting is the driving force of the fashion business and how does it work in conjunction with quick response issues.

### **The Information network for Building trends**

- This is a collective activity involving team work. This is a combination of in-house people and freelance contacts the set up is on a very large scale based in key places around the world, i.e. UK, Europe, USA, China, India, Sri-Lanka and Japan

### **Decision making**

- What is likely to happen, awareness, intuition, observation
- How they recognise trends, dark horse etc.

### **Driving force**

- The amount of consumer sales tracking suggests the hypothesis that consumers are the driving force of the fashion business.
- Trend agencies feel they are essential to clients especially small companies. They help retailers and brands make the right product development decisions.

From this chapter it can be deduced that the problems of the trend forecasting agencies are:-

**Problem 1** - The positive and negative perception of trend forecasting.

Missing emerging trends - not satisfying consumer needs - retailers loose profit

**Problem 2** - Cannot supply enough trends to keep abreast of the pace of fast fashion.

Increasing demand for quick response from the industry / retailers to come up with new trends more frequently, leads to more trend agencies emerging with online trends, resulting in a lot more competition than there used to be for the traditional few trend forecasting agencies.

**Problem 3** - Conventional timing of set fashion events - seasonal for fabric, colour and styling trade fairs conflicted with fast fashion.

Traditional manufacturing production times are affected by fast fashion - it is difficult to keep up the pace.

In the following chapter the challenges facing the trend forecasters in the fashion timeline are discussed and illustrated in rich pictures. The three problems identified from the trend forecasting agency case studies are illustrated in a rich picture format in line with the SSM stages 1 and 2 of the system.

## **Chapter 5: Challenges faced by the trend forecasting agencies in the fashion timeline**

The issues the forecasters faced during the production of the trend package are discussed in this chapter. The methodology selected to interpret this data is the soft systems methodology (SSM) by Patching (1990). This system designed for creative thinking and practical situations is used to interpret the problems facing the forecasting agencies. The problems are explained and illustrated in rich picture format. Stage 1 and 2 of this system are explained and used to interpret the roles and skills of the forecaster and the sequence of events to producing the trend package. The key relationship between the forecasting agency and the fashion industry is also illustrated. The justification for using SSM is outlined.

### **5.1 The problem situation – unstructured – Stage 1**

The word unstructured used in SSM is taken to mean the initial perception of the problem in the early stages of investigation. In this case identifying the problems faced by the trend forecasting agencies - how it is and how it should be. Patching (1990) refers to Checkland's statement which reflects the predicament of the trend forecasting process from the eyes of the researcher and from the information gathered from the literature review and the problems interpreted from the trend forecasting agency interviews.

*'Any situation in which there is perceived to be a mismatch between what is, and what might, could, or should be'.*

(Patching, 1990:44)

The trend forecaster's interviews highlighted the following problems that fit in with this statement:-

- The trend forecaster working on intuitive ability involves a risk factor of missing trends or a mis-match of the prediction of trends in reality.

- The increasing demand for quick response from industry and retailers to develop more trends frequently leads to more trend agencies emerging, creating a lot more competition for the existing ones.
- The traditional calendar of set fashion events mis-matching quick response and therefore not coping with the increasing demand for new trends

Trend forecasting is a service which is used in the fashion industry. It enables designers in manufacturing, buyers in the buying team and retail to predict what they consider to be the right trends for product development. These trends need to be predicted accurately and at the right time in the season to promote successful sales and company profit. The trend forecaster within the trend forecasting agency has a role to fulfil which involves predicting what is happening now, in the near future and distant future.

The trend forecaster relies on intuitive ability to recognise the trend influences of the times, using guesswork for what could be seen as the black and white tasks, along with the in-between nuances of greys, whilst remaining objective from personal preferences for predictions (Perna 1987). It is difficult to recognise the ‘spirit of the times’ whilst living in them (Brannon 2011:67). The trend forecaster has to have an overview of colour, textile development and design concepts. The trend forecaster has to use these skills of awareness, insight, objectivity and interpretation in order to analyse the trends to determine the potential match with consumer profiles. This information needs to be interpreted into wearable collections from the consumers’ point of view.

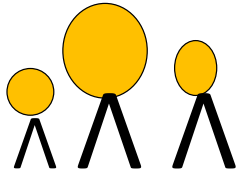
The trend forecaster has to be able to recognise shifts in retail formats, evaluate potential impacts of the trends and translate the potential for their clients in order for them to be able to reposition their business for the changing market. There is the need for the trend forecaster to be able to assess problems and threats that may come about and assist in matching clients to consumer segments and products. See Figure 5.1, Role of the trend forecaster.

The skills required to be a trend forecaster involve scouting the market, analysing and anticipating cultural shifts, in order to be able to predict the mood, behaviour and buying habits of the consumer. In order to do this the trend forecaster needs to have a mental mind map of the market place. All the trend information gathered is used to identify style trends.

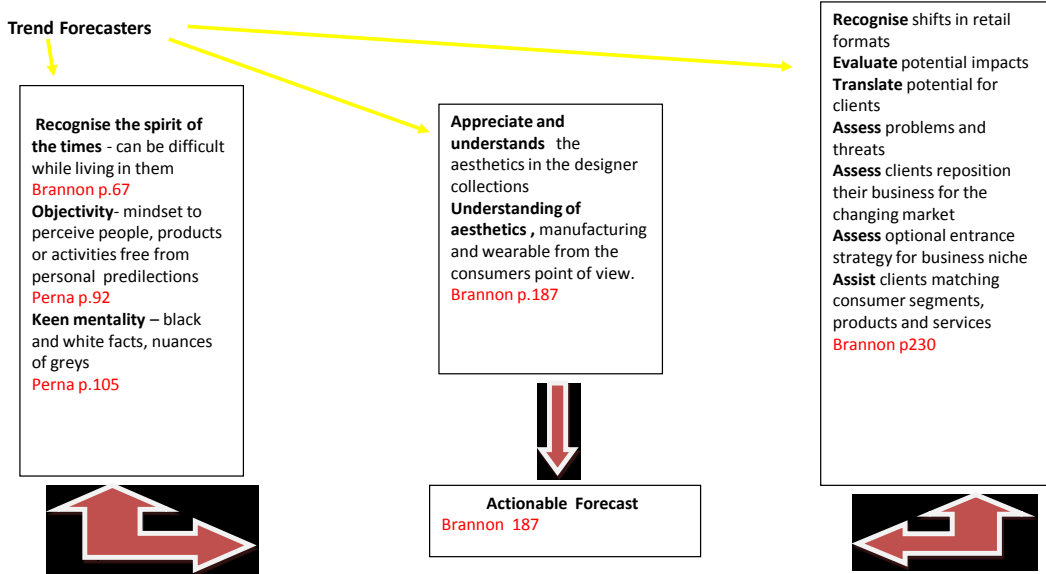
The assembled information is reviewed and evaluated during in-house meetings to develop an actionable forecast for trend forecasting. Trend packages are produced for up to two years ahead. The trend forecaster works closely with the retailers, buyers and manufacturers to identify style trends addressing what is likely to happen now and in the future. See Figure 5.2, The skills of the trend forecaster.

The key sequence of events for the trend forecaster in preparation for producing the trend package as well as scouting the market is, to visit the well known leading trade fairs known in the fashion industry circle for colour, textiles and style. All these thoughts are reported back at the in-house team meetings to further discuss trends. Trend packages are produced based around these trend ideas. The trend forecaster also has to be abreast of celebrity fashion influences which are not part of the original trend package.

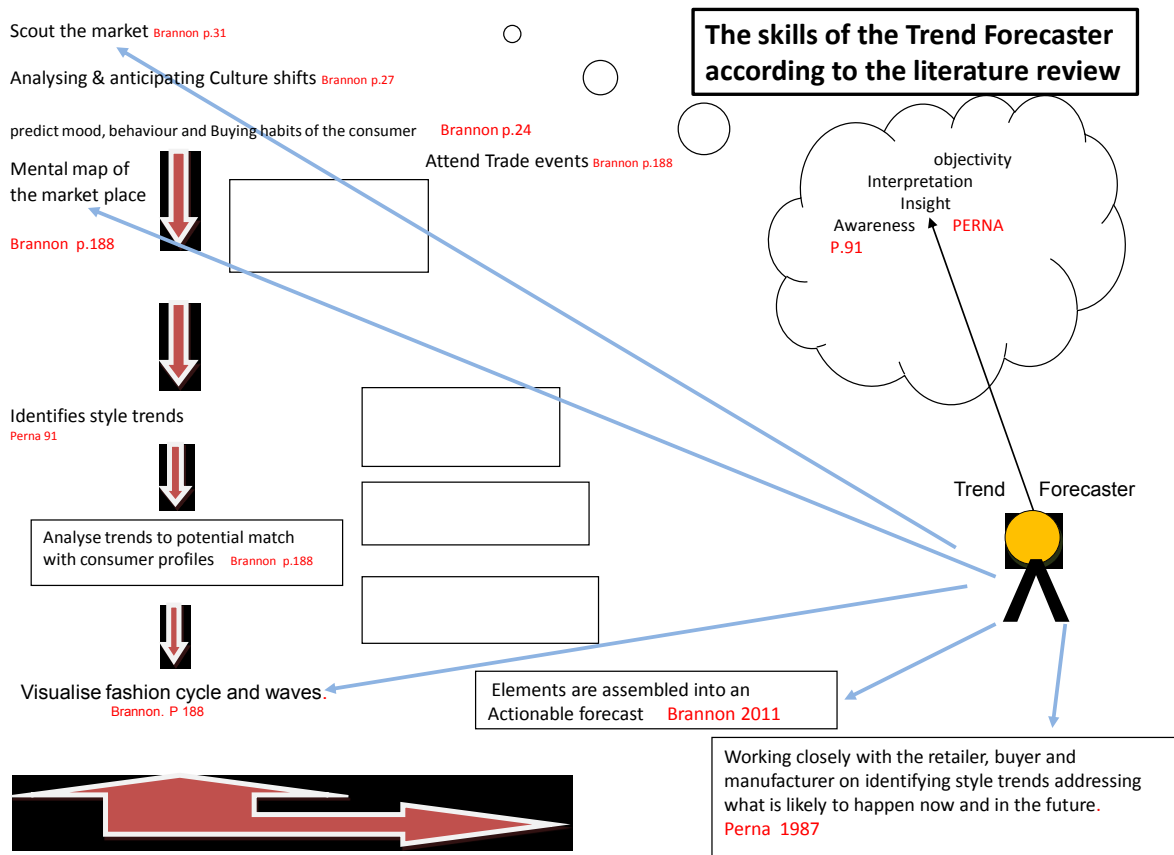
Client meetings in the fashion industry with buyers, manufacturers and designers then take place to discuss the new trend ideas for the coming season initially based upon past success and then on future ideas. Key relationships within the trend forecasting industry include the garment manufacturer, the buying office and the high street retailer. See Figure 5.3, The key sequence of events for the trend forecaster.



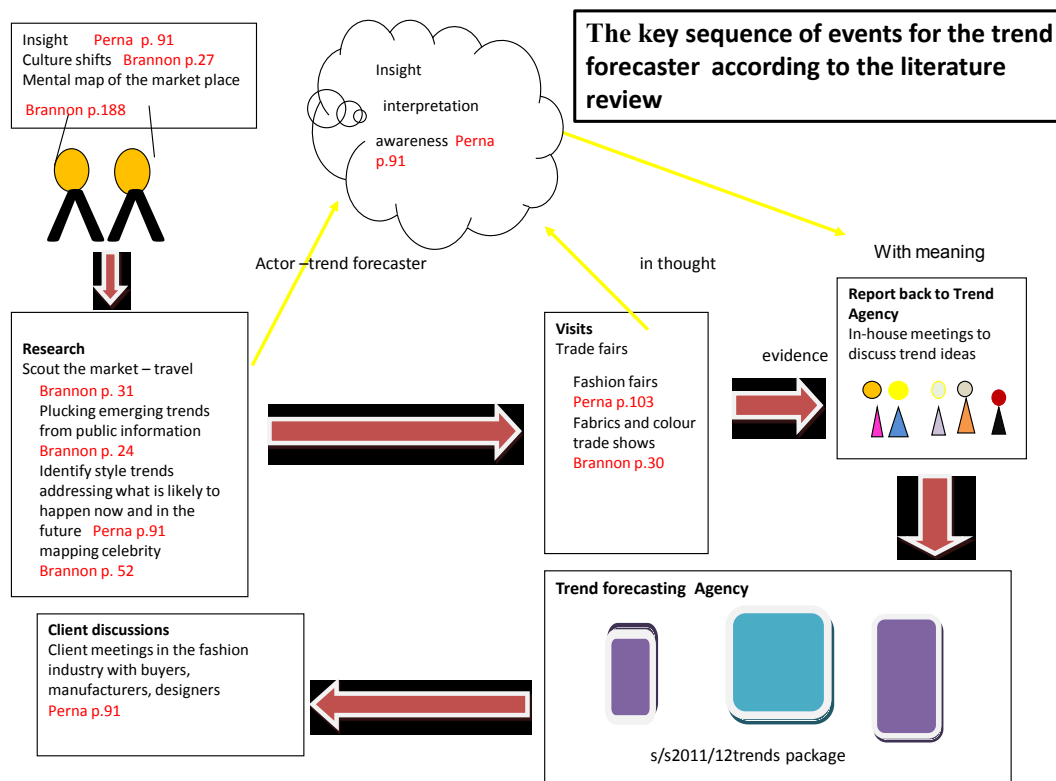
**The Role of the Trend Forecaster – personal spec according to the literature review**



**Figure 5.1 Role of the trend forecaster**



**Figure 5.2 The skills of the forecaster**



**Figure 5.3 The key sequence of events**

## 5.2 The Actors

The SSM methodology at this stage is to identify the problem situation and the problem owner and the actors involved in the process. Patching (1990) refers to Checkland who puts forward the analyst as the problem owner, along with anyone else who will benefit from any improvements made to the process as a result. Patching put forward the employer of the analyst to be the real problem owner and the analyst as the problem solver. In the case of the trend forecasting agency, the problem owner could be any person identified in any sector of the industry that is involved in the trend forecasting process. This is shown in the example Figure 5.4, Key relationships within the trend forecasting industry SSM, showing the actors in each section of the industry who work with the trend forecasting process from initial concept to the consumers of the end product. The actors are the trend forecasters or team players from the trend forecasting agencies. The actors of the trend



forecasting agency service are the employees who produce the trend stories i.e. the forecasters.

This system uses language terms that need to be taken on board by the user:-

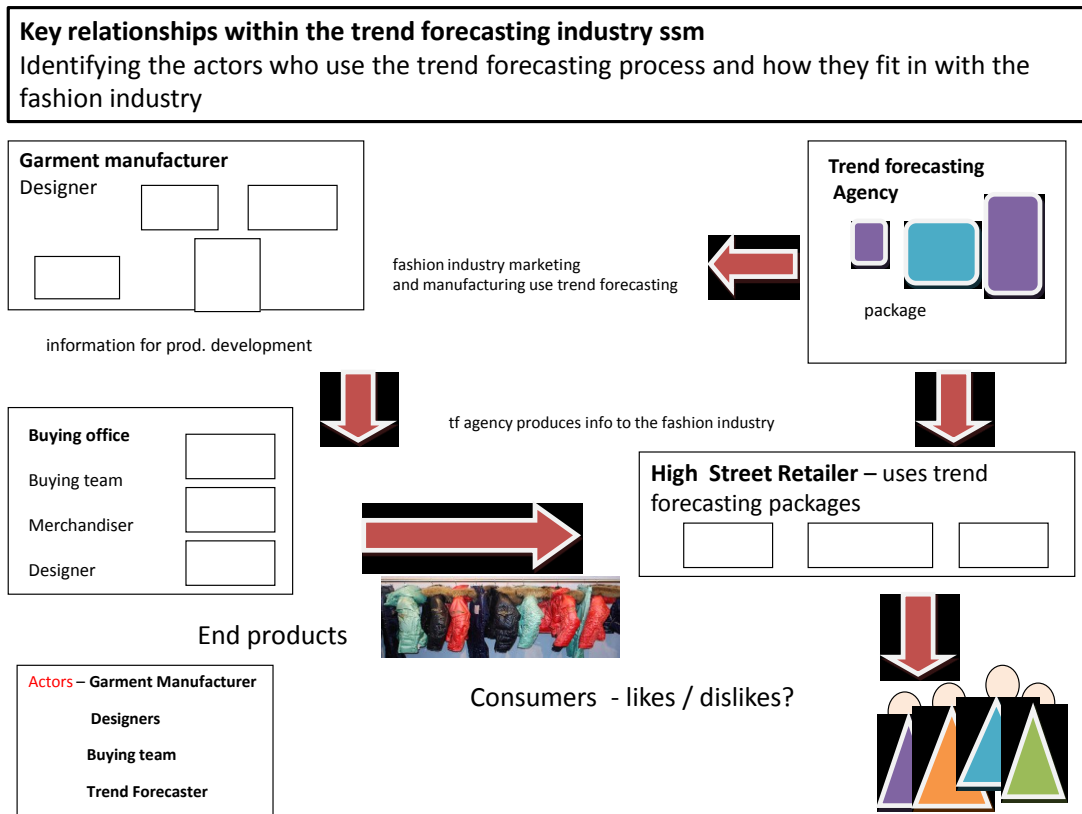
- Primary actors - Trend agency forecasters

- Secondary actors - fashion employers of companies - designers, buyers

- The consumer is not an actor - no saying input

- The actors carry out the activities of the system and provide the benefits to the clients.

The garment manufacturer may have a team of designers who liaise with their clients, the buying team for a high street retailer on what trends are going to be selected for the coming season. The designers will probably have their own influences of trends and possibly have consulted with a trend forecasting agency or bought a trend prediction book as well to help them. The buying office representing the retailer will also have consulted a trend agency prediction book along with their own trend views picked up from their own research. All of this information will be used in product development for the high street retailer. The end product results will be tested on success or failure by the consumers likes and dislikes and the final sales figures. This is all demonstrated in Figure 5.4 below.



**Figure 5.4 Key relationships within the trend forecasting industry SSM**

### 5.3. The problem situation expressed - Stage 2

To develop this stage of the information it is necessary to use the background information from the literature review regarding the trend forecasting agencies. Three problems have been identified and are outlined below:

#### 5.3.1 Problem 1: The positive and negative problems of the trend forecasting agencies

A positive viewpoint of the trend forecasting process is a tool used by a specialist service sector to provide accurate trend prediction packages to the fashion industry, where the aim is to predict trend preferences for a future fashion season in the near future. This results in

the industry being able to manufacture, and the retailer to produce trend-led products for the success of the retailer and manufacturer. The trend agency is the answer to industry success.

A negative viewpoint is that the trend forecaster is slow to analyse new trends, missing emerging trends, slow response and therefore leading to the retailer losing sales to their competition. The manufacturer therefore loses profit along with the retailer as they have not satisfied consumer needs.

The problem situation needs to be better understood in terms of recognising shifts in retail formats, evaluating potential impacts, translating the potential for clients and assessing problems and threats. This also impacts on assessing how clients can reposition their business for the changing market and how to assist clients matching consumer segments, products and services.

The responsibility for trend direction is put on the trend forecaster. These are the actors who produce the trend packages they pass on to the manufacturers and buying team. The retailers look at buying behaviour from past seasons data. See Figure 5.5, Problem 1: The positive and negative perception of trend forecasting.

### **5.3.2 Problem 2 : Increasing demand for quick response from industry / retailers**

As previously stated, to develop trends more frequently, leads to more trend agencies emerging. Trends become available online, resulting in more competition than there used to be for the traditional few trend forecasting agencies. The trend agencies then struggle to keep up with the constant demand for new trends from industry and subsequently the retailers and the consumers, thus creating chaos for the trend agencies. The high turnover provides little warning of potential fashion looks. It is hard to recognise the spirit of the times while living in them. On the edge thinking increases uncertainty, improvisation and the risk factor of getting it wrong. Tunnel vision can also be a problem. See Figure 5.6, Problem 2 : Increasing demand for quick response from Industry.

### 5.3.3 Problem 3 : Conventional timing of seasonal fashion events

Fashion events, such as fabric fairs, colour and styling trade fairs, are set to a traditional fashion calendar that does not fit in with unconventional timing, such as fast fashion, which requires a constant feed of new trend ideas. The traditional set up of two seasons per year with a few high season updates fits in with this traditional fashion calendar, the increase in fashion trends turnaround has consequences for production lead times which also fit in with the traditional fashion calendar making it difficult to keep up the fast pace required. The trend forecasting agency also originally produced two seasonal trend books per year, but knows that they are being forced to supplement these packages continuously causing organisations to turn into chaos. Figure 5.7, Problem 3: Conventional timing of set fashion events.

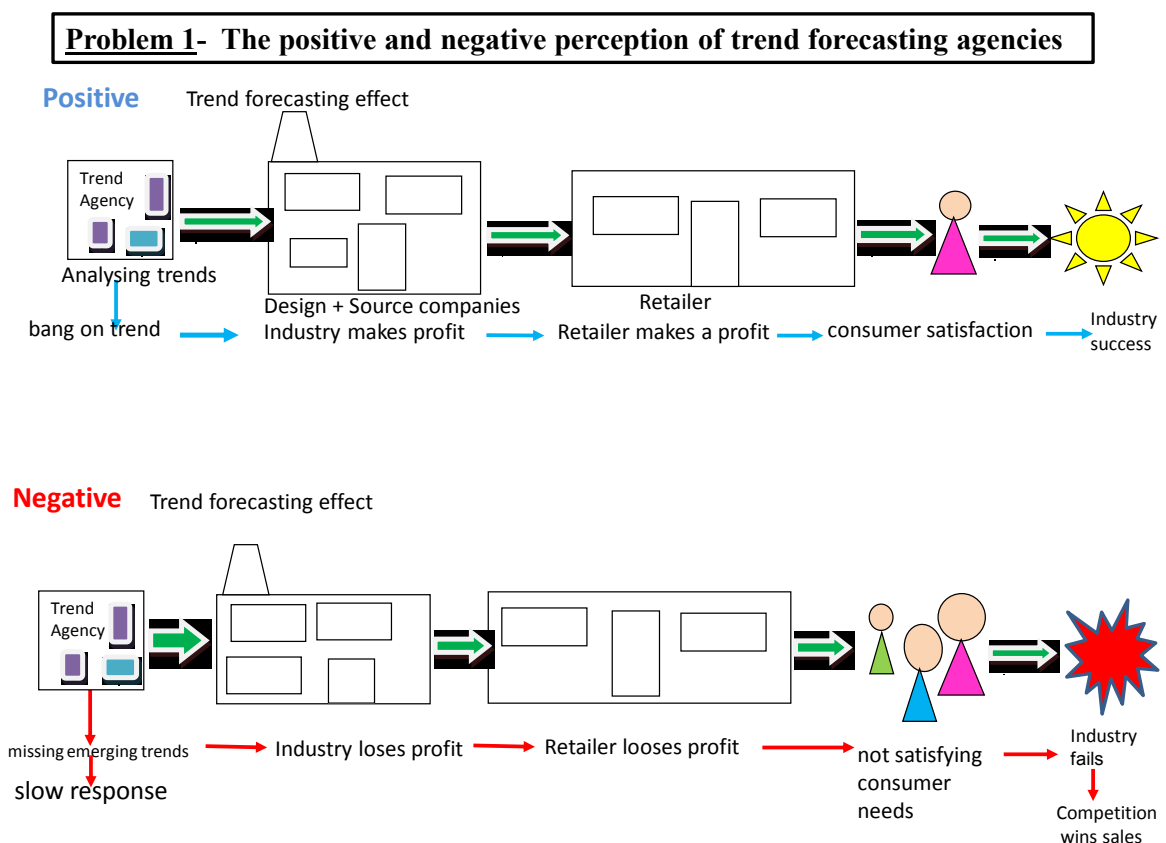
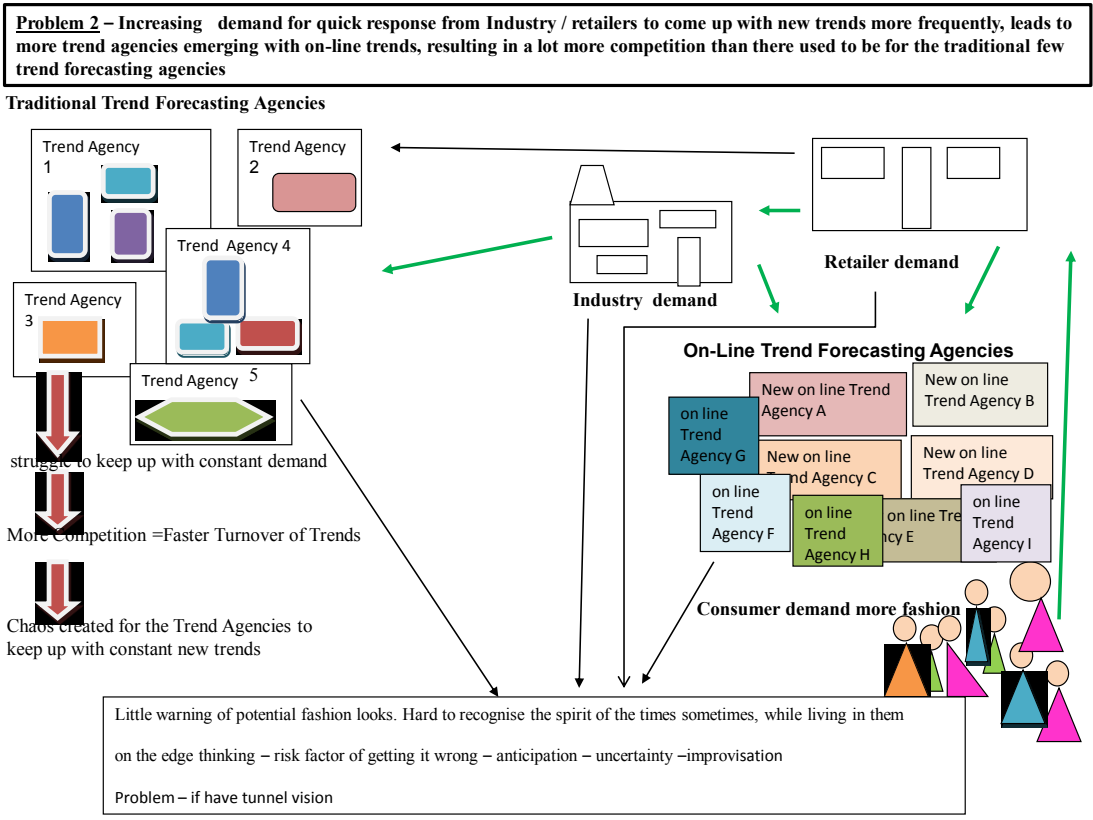
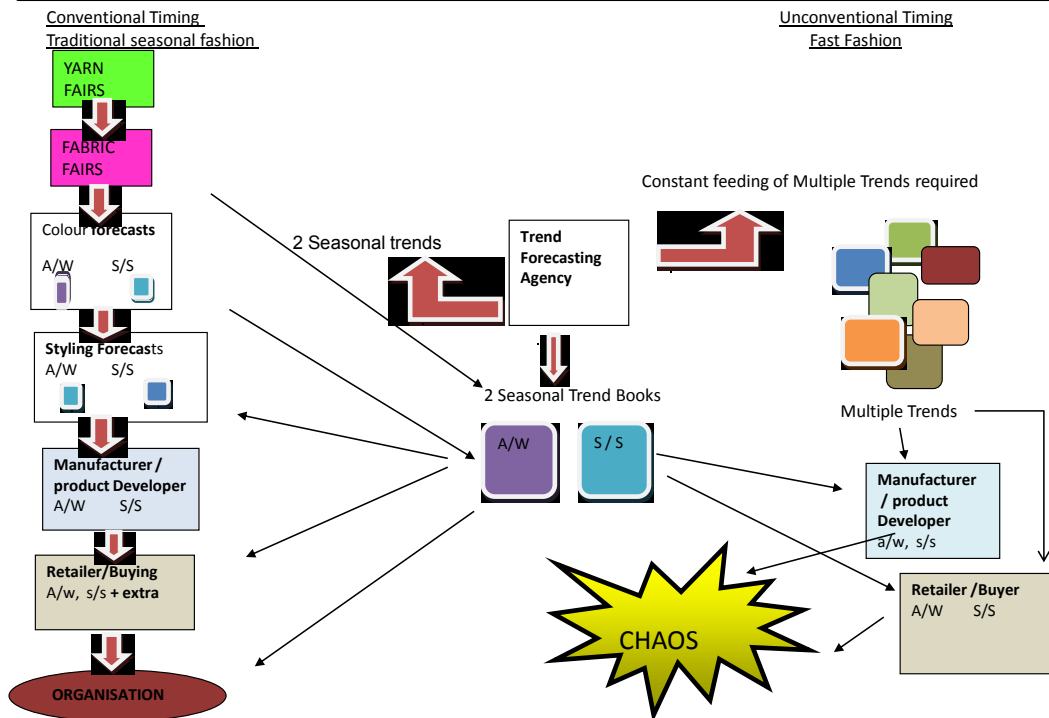


Figure 5.5 Problem 1: The positive and negative perception of trend forecasting



**Figure 5.6 Problem 2 : Increasing demand for quick response from industry**

**Problem 3 –Conventional Timing of set fashion evens – seasonal for fabric, colour and styling trade fairs does not fit in with fast fashion**  
**Traditional manufacturing production times is affected by fast fashion- difficult to keep up the pace**



**Figure 5.7 Problem 3 : Conventional timing of seasonal fashion events**

### 5.3.4 Identifying problems for the trend forecasting agencies

1. The introduction of fast fashion for trend agencies is a problem because trend agencies are trying constantly to keep abreast with new ideas, when they have really accustomed to a set fashion calendar of two seasons per year and a few extra trends added mid season.
2. More trend agencies are emerging online e.g. WGSN, MUDPIE, etc., increasing the competition. The newer online agencies are introducing trends quicker than the original few causing problems for the traditional forecasting agencies who are finding it difficult to keep up with the demand. There is little warning of potential fashion 'looks'. Often it is difficult to identify the 'spirit of the times', while living in amongst them. This involves a risk factor for the trend forecaster who is relying on intuition to create the trends therefore, there is anticipation, uncertainty and improvisation

involved and a problem arises of a mis-matching with reality if the forecasters have tunnel vision.

3. The timing of set fashion events is seasonal for fabric, colour and styling, fast fashion conflicts with this conventional timing. Manufacturing and traditional production times are planned with long lead times, fast fashion is based on quick response and short lead times which again conflicts with convention and it is difficult to keep abreast with the fast pace.

## **5.4 Summary**

The problems facing the trend forecasting agencies were discussed based on the feedback from the case studies. The role and the skills of the forecaster were explained and the sequence of events that took place within the forecasting agency in order to produce the trend packages. The problems identified and the roles and skills of the trend forecaster were illustrated in rich pictures using soft systems methodology for stages 1 and 2 of this system. The research will now move forward to how trend forecasting information is used by the fashion industry.

## **Chapter 6: The buying interview results for seasonal and fast fashion retailers**

In this chapter the research moves onto how trend forecasting information is used by the fashion industry. Interviews had been conducted with the buying and design personnel. The feedback from the interviews highlighted how the trend forecasting information was used in the product development process. The purpose of the buying team interviews was to establish how the trend forecasting process was carried out in the product development process in the fashion industry. This included researching the usefulness and effectiveness of trend forecasting, who leads the decision process and how the trend forecasting information is used when building the garment ranges. The knowledge gained will provide an in-depth understanding of the subject matter and this data will be used to establish conceptual models for trend forecasting for seasonal and fast fashion in the product development process. Themes will be drawn from information taken from the literature review and the results of the buying team interviews.

To investigate buyer perspectives interviews were conducted with members from the buying team from Tesco, Matalan, Shop Direct, River Island, Primark, H&M and ASOS, supplying a combination of seasonal and fast fashion retailers. The selection of team members included a combination of the buyer, merchandiser or designer, chosen to offer a wide range of attitudes and opinions from which to draw an evenly balanced point of view. The results of the buying interviews were analysed and the following data recorded:-

### **6.1 The usefulness of trend forecasting in the product development process**

All of the buyers and designers interviewed believed that trend forecasting information was definitely useful in the product development process. Participant 6, the buyer for Tesco, stated trend forecasting information assisted them in updating the trends and ensured they were on the same 'wavelength' as their high Street competitors and this would ultimately make certain they (should) have the clothes or accessories that



consumers recognised from the catwalk, amongst the celebrities and in the magazines. Participant 6 observed ‘At the end of the day, the final product always has to be fit for purpose and for us, fashion at prices which the customer can afford and feels is great value for money. Anything can be designed into, but if the fabric is too cheap or is badly made, then no matter how high fashion the piece, the customer will eventually grow tired of poor quality and start to shop elsewhere’ (Anon, 2009b).

The designer Participant 8 and the merchandiser, Participant 9 from Shop Direct believed that trend forecasting was crucial to the product development process. Participant 8 found they used trend forecasting information combined with their experience to endorse their trend analysis and so it became an integral part of their research. They used four trend books for styling and one book for colour trends. Participant 10 the designer from Matalan also used the trend books as back up to re-enforce the styles designed they had researched prior to range planning. A designer from H&M stated that using trend forecasting agencies featured heavily in the design process, supported by internal focus groups researching the trends as well. Trend forecasting agencies had proved to be reliable in terms of predicting the most commercial new trends and they were also useful for keeping them updated when planning the garment ranges. A designer from River Island and an assistant buyer from ASOS found that trend forecasting information was extremely useful to determine the styling, colour and fabric trend predictions when planning the new ranges. It was pointed out that the retailers were keen to select the new trends, whilst observing the catwalk trends. The social factors pre-season were also taken into account to give the buyers insight for the total picture in order to be able to anticipate the new trends.

### **6.1.1 The effectiveness of trend forecasting**

All those interviewed reported that trend forecasting information was very effective. Participant 6 a buyer for Tesco ladies wear pointed out that trend forecasting information ensured their ranges were new and current, so hopefully the consumers would purchase garments from Tesco’s range rather than with their competitors. Participant 7, a menswear buyer for Tesco recognised that there became re-occurring trend ‘messages’ when researching through the trend forecasting information which provided the evidence and

gave them the confidence to select the strongest trends. The buyers from Shop Direct, H&M and Matalan found trend forecasting information was effective when used in conjunction with their own pool of ideas, when putting together their trend and colour mood boards.

The designer from H&M believed that trend forecasting was effective when researching the general mood or the mindset of the consumer. However, it was important to really know the H&M customer 'look' before consulting the trend forecasting information and then being selective over the information to be used. Therefore trend information should not be heavily relied upon but used more as a guide or a 'thermometer' to ascertain the mood in the market place, rather than as a strict set of rules to be followed for the future season. The buyers and designer from River Island reported that certain elements were definitely featured in the seasonal trend forecasting information, such as the colour aspect or garment details which contributed to creating the future ranges. An assistant buyer from ASOS reported that trend forecasting was very effective for keeping up to date with the trends when planning the mood boards for the new ranges and for reference when discussing garment styling in their team meetings. It also ensured the designers and buyers kept updated with their competitors who also used the similar trend information.

### **6.1.2 Who led the decision in the range planning process?**

A buyer from Tesco proposed the decision-making on which trends were chosen when range planning was decided by the design team. The Product development process was weighted 50% / 50% being designer and buyer led. Range building was possibly 30% designer and 70% buyer led, concluding that the buyers led overall in the decision-making process. Participant 9 the merchandiser for Shop Direct viewed the decision-making process for which trends were chosen for the garment ranges was a combination of the designer and the buyer, but mainly down to buyer to make decisions on the trends. There were approximately 20 teams working on different product ranges. The design team presented the trends and colour palettes to the buying team. Participant 10 a designer for Matalan also agreed decisions were buyer led and explained that the in-house design team presented the new trends to the buyers at the beginning of the season. The design and

buying team discussed these new trends taking into account cultural and social issues and street fashion trends in order to make decisions on how this fitted into their customer profile. The past seasons successful garments were taken into account by the buyers and how they were going to replace these existing product lines. Ongoing updates were carried out throughout the season for 'open to buy'.

A designer from H&M described their collections as being created by a team of 140 in-house designers, buyers and pattern makers. They all worked together in the departments of buying, design, interiors, technology and marketing at their head office. Each H&M concept had its own team of designers, buyers, assistants and pattern makers, which also included a section manager and a controller. The designer explained the buying department made the decisions on planning the ranges, after that all practical aspects were dealt with by their production offices. These production offices were based in Europe and beyond, most of the employees were from the local population and they were in constant contact with the garment suppliers. The production offices were responsible for placing the orders with the right garment suppliers and for these items being produced at the right price, whilst making sure that they were of good quality and delivered at the right time.

At River Island the buyers reported they were responsible for design direction and making decisions during the range planning process. They had an in-house design team, who initiated the design ideas for the new ranges. However, they then liaised with the buyers for design direction. The buyers made decisions based on previous sales, which provided the evidence on which to base the new ranges. The buyers from Primark and ASOS reported that mainly the responsibility for decision-making on design direction was taken by the buyer. The buying team at Primark started with the director of buying. The buying controller and the departmental merchandiser reported to the director of buying. The buying teams consisted of a senior buyer and senior merchandiser, buyer, merchandiser, assistant buyer, trainee merchandiser and trainee buyer. The trainee buyer had the role of sourcing the fashion trends and the catwalk trends. The merchandiser had to have the commercial awareness and the time management. The buyer communicated with the suppliers and had the personal input into the garment ranges and garment specifications. They also had control over the style of the garment, the quantity purchased, the selling price and the critical path. The buying team at ASOS consisted of the head of buying with

a team of 20 buyers working on many product categories. The buyers worked closely with design, merchandising, marketing and garment technology departments. ASOS had their own in-house design team who designed the ranges within trends. Designers presented these trends to the buyers three or four times a year. The buying team made decisions on the products included in the new ranges, with specific details, the mix and match of items, the colour selection and which items would be the key pieces of the season, plus any repeat orders.

### **6.1.3 Inaccuracies of trend forecasting**

Several examples were given for the inaccuracies of trend forecasting by the buyers and designers which are set out in Table 6.1:-

<b>Tesco</b> Buyer	Occasionally the popularity of a trend was mis-judged by them not buying enough quantity of the new fashion products in some of the trends. This was because the buyers lacked confidence in their judgement when selecting new fashion trends. Confidence to buy the newest key garments in order not to sell out depends on the timing; for example, formal shirts were more difficult to judge than jersey and shirt products. They tried to capture all the trends and not let any ‘fall through the net’.
<b>River Island</b> Buyer	If they had underestimated the popularity of a trend and they had not purchased enough stock, this would be rectified by buying more stock, sometimes changing suppliers who could provide a shorter lead time for example, Portugal or Italy, instead of China or India. However, they would not want to buy too much stock; in case of poor sales and to ensure there was no loss of profit.
<b>Primark</b> Buyer	‘Utility’ was one of the trends chosen for the range of July / Aug 2010, inspired by Balmain. This theme did not sell as expected because the ‘Aviator’ trend became more popular. A designer from ASOS commented when certain trends did not sell it was important to discover the reasons why, especially as they were known for being a trend led company and they liked to be considered the best, therefore they monitored garments every week.
<b>Matalan</b> Designer	They sometimes failed to foresee colour trends and realised on reflection they should have been better prepared, as it was crucial to get the colour right. For example, a plain styled cardigan in cobalt blue. This could have been a successful knitwear line and they did not foresee this. Their Policy was to be reactive, for example change a garment style if sales were too slow to make it more attractive to sell. For example, a full length linen trouser could be changed into a cropped pant.
<b>H&amp;M</b> Designer	On occasions some trends had been over exposed or did not translate successfully with the customer. A recent example of this was tie-dyed trousers. Some trends may not be recognised, especially with smaller product types, such as denim. There could often be product specific trends or technology development trends that were missing from some of the trend forecasting agencies. Many of the larger trend agencies trends were so broad they lacked detail on some product types. There were a number of smaller trend agencies specialising in specific product types, but these sometimes lacked the broader trend information.

**Table 6.1 Inaccuracies of trend forecasting**

#### **6.1.4 How trend forecasting information is used when building of the garment ranges**

A buyer from Tesco reported that they focussed more on key themes from the trend information. Then they concentrated on selecting the most relative key garments from those trends suitable for the Tesco range. In the menswear range for example, jacket styles, slim suits and military shirts. The Tesco buying teams were given a trend pack prior to the start of season from the design team who assigned specific trends appropriate to their customer profile. The trends were put in a logical order dependent on the season and this formed the basis on which they developed the ranges. These trends were presented to the buying teams. They had a press day, where the garments were styled and 'looks' created. Photographs were taken of these styled 'looks' and displayed in the stores.

Shop Direct had an in-house design team who developed their trends using WGSN, Style.com and comparative shopping research. The trends were chosen specifically for their customer profile. The design team presented trend ideas pre-season before the start of range planning. The buyers analysed the best sellers from the previous season prior to developing the new mainstream ranges; approximately 80% of the new range would be taken from best sellers. A designer from Matalan stated they selected key garments for example, 'Peg' pants and did not plan the range within trends. The in-house design team absorbed all the trend research information and tailored it to their customer profile, such as the 'tribal' trend or the 'nautical' trend. As a team they were moving more towards planning within the trends. They researched trends for the total season but only made decisions for the first phase of the range and finalised deliveries, before moving onto the next phase. The trends were researched and updated for each phase of the range plan because the trends market was difficult to predict and the trends became stale.

For example, the Spring / Summer season 2010 the research started in January 2009. The catwalk Spring 2010 was not available until September 2009. So the fabric designers were developing fabrics, from what they had observed at the fabric fairs. The in-house fashion designers were conducting independent research on trend 'influences' rather than an all round 'look' for their whole range for example, a core product might be influenced by the 'sculptured look'. The structured 'look' is a 'directional' influence which could cut across

many product types such as knitwear, jersey or blouses. An example of Matalan's interpretation of this 'look' was 1980's tailored power dressing. For the mid-range in the present economic times they were designing garments referred to as 'trade-up' items, supplying luxury items for less expense and described as investment Pieces, such as the luxury cashmere coat. How they utilised and interpreted a trend across the garment types in their core and mid-ranges is illustrated for Matalan in Table 6.2 below:-

Designers	Chosen Trend	Designers interpretation of the trend	Core-range	Mid-range
Use a predicted trend from the trend forecasting agency	The 'sculptured' look	The 'structured' look  Influence -1980's tailored power dressing	Trend cuts across product types  knitwear jersey blouses	Investment Pieces  Luxury cashmere coat

**Table 6.2 The interpretation of a trend across a garment range**

Celebrity fashion was also followed up, weekly reports (cultural influences were referred to from Paris, New York and India and not trend book related) were conducted by the junior merchandisers. They read magazines such as Heat and Grazia, researched the Sunday supplements, observing styles the celebrities were wearing, such as vintage garments, the 70's jumpsuit or the maxi dress. Interpreting these styles provided reassurance they would be popular with the consumer.

The buyers and designers from H&M, Primark and ASOS used trend forecasting services during the initial concept of the new ranges. Sites such as WGSN were a common resource and trade shows such as Premier Vision, which was visited bi-annually for colour and style trends. Other resources included magazines such as Vogue and blogs. Comparative shopping was conducted on the high street, for example, at Topshop. Observations on newspaper websites, celebrity, street, music, art and social media for any inspiration or developments was conducted, combined with sales tracking and customer feedback. The designers and the buyers analysed this information along with inspirational research gained from shopping trips in Los Angeles, Miami and London. Samples were brought back from these trips and used to aid development of creative ideas. A number of factors determined

the final composition of the 'concepts' within the range. Figures for the previous season were combined with an analysis of new trends, the colour trends and the garment construction and fitting.

Trend information was usually used to compliment or confirm their ideas at the beginning of the season. The trend package was planned in advance of the range planning season, whilst the latest trends were selected at short notice for fast fashion. 'Pop-up' trends (in particularly celebrity led trends) were considered to have originated from blogs, magazines, music trends and street style rather than trend forecasting. A designer from H&M observed that some of the trends from these resources coincided with their 'thinking', so this was a good place for reference for such trends. However, in general the buyers were not relying on them for these types of trends, as these tended to come initially from other media sources. As these trends were very timing sensitive, forecasting sites were helpful to reference during the product development stage to ensure as quick a lead time as possible for fast fashion. When H&M used trend forecasting information sites, they considered it was necessary to be very selective as to what would or would not work, for both their customer profile and their product categories. Their aim was not to rely on trend information too much for inspiration, so as to maintain a sense of individual creative identity.

A buyer from River Island explained inspiration was taken from trends from the catwalk, *Première Vision* (PV), WGSN, *elle.com* and *style.com*. The designer would have previously prepared this pack of trends, (split into different categories such as plimsolls, formal shoes etc.) and these ideas would then be shared with the buyers, who would give direction to what should be included as part of the range (fabric types, garment shapes and any detailing). The buyers from Primark also used trend forecasting information from WGSN such as the catwalk shows, reports from the trade shows, sketches, style trends and key garment shapes. They referred to the trend prediction agency Perclers for colour trends three or four times a year. An external designer was used for print ideas. Fabric and trade fairs such as LA, Denim, Bread and Butter, Petit Fillatti and PV were also attended. They referred to magazines such as *Vogue*, *Grazia* and *Closer*, celebrities such as Cheryl Cole, popular music trends such as 'Grunge', 'Indi' and '50's Retro' combined with supplier feedback, sales reactions and monitoring their competitors.



### 6.1.5 How decisions are made on selecting the trends

The trend information and themes the buyers from Tesco had observed at the trade fairs gave them confirmation on making decisions for selecting the trends to be used for their ranges. The evidence of a recurring ‘theme’ gave them confidence, when seen in the trend books and again at the trade fairs. The strongest themes were discussed. They became clearer on trend rather than colour. When developing the ranges a few months into range development, they re-called colour agents for further discussion on colour confirmation. The merchandiser from Shop Direct explained that the choice of trend information used is a collective decision made between the buying and merchandising team. Trend board presentations were conducted in-house to the buyers and merchandisers four times a year. They input a level of ‘newness’ into the ranges, but decisions were made mainly aligned to a set structure and price points. The clothing and footwear teams made joint decisions. All the heads of the buying teams met prior to the beginning of season to discuss trend ideas with the in-house designers. The heads of the buying reported back to their individual teams their version of the interpretation of the trends. The individual teams selected which trends they considered to be suitable for their ranges. For example, ‘Darkness Falls’ was one of the chosen trends from WGSN. This trend may play a major or minor part in the range dependent on the ‘look’ the buyers wanted to achieve. This specific trend was used several times across the seasonal ranges. However, the interpretation was changed to suit that particular range as illustrated in Table 6.3 below:-

Designers	Chosen Trend	Designers interpretation of the trend	Young designer fashion range	Mainstream fashion range
Use a predicted trend from the trend forecasting agency WGSN	‘Darkness Falls’	Suitable for their customer profile	Fashion conscious lingerie range	Trend toned down for main lingerie range

**Table 6.3 The adaptation of a trend to a customer profile**

H&M had teams of internal designers and buyers who interpreted the latest fashion trends and created the collections together. The designer’s inspiration for trends was drawn from film, travel, culture, the media, trend forecasters, trade fairs and exhibitions. Other trends

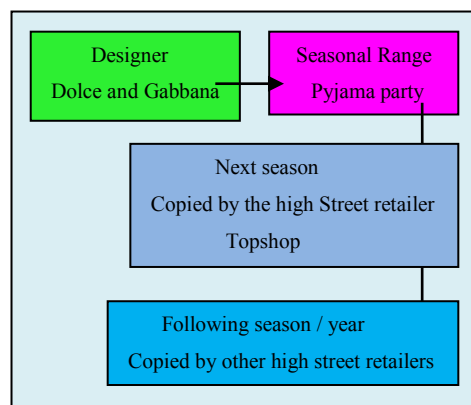
originated from the catwalk, the street, traditional dress or individual style icons. These trends were then adapted to commercial fashion 'looks'. Behind each product lay a constantly ongoing creative process. The designers and buyers worked together when deciding upon themes, colours, fabrics, silhouettes and garment styles in order to create the new season's collections. Trends and influences were adapted to styles and models that would suit their customer. The customer was always the main focus, personnel from the design and buying teams visited their stores to collect customer feedback on their products. All feedback was taken into consideration when planning the new seasons' collections.

The River Island design and buying team scheduled meetings at the beginning of each season eg. Spring / Summer and Autumn / Winter. During each season review meetings were planned four times a year in the set months of November, December, January (NDJ), February, March, April (FMA), May, June, July (MJJ) and August, September, October (ASO). In all these meetings they discussed trends, sourcing and garment sampling. The designers started the trend and design ideas by producing a trends pack of prints, shapes, texture and colour and liaised with the buyers for design direction. The buyers discussed the previous sales figures and modelled the new product ideas on this information, for example, how many plimsolls, suits and t-shirts they would want to buy. Garment samples would then be made by their suppliers (if these samples had not arrived on time from the suppliers, samples would be 'mocked up' for style representation. The designs and specifications would be viewed on CAD). These samples would then be reviewed to ensure they met the team's approval.

The buyers from Primark and ASOS began their research for developing the new ranges with shopping trips to locations such as New York, Los Angeles, Miami, Tokyo, Hong Kong, Delhi, Milan, Madrid, St Tropez, Ibiza and London. These trips were regarded as an essential part of their job role when developing and sourcing the new ranges. This was followed by reviewing the catwalk trends for Spring / Summer and Autumn / Winter, WGSN style and graphic trends, magazines, celebrities, supplier feedback, and sales reactions. Reports from the fabric and trade fairs, such as LA Denim, Berlin, Petit Fillatti and Première Vision for colour trends and Perclers for style trends. Reports from the music festivals and images of street style shots were also taken into account.

### 6.1.6 Is trend forecasting the driving force of the fashion business?

A buyer from Tesco reported that trend forecasting was not necessarily the driving force of the fashion business because it depended at which level a company was pitched. In the current environment fashion forecasting was much more driven, customers were more aware and wanting ‘newness’. As the market was moving much quicker, so fashion forecasting was becoming more important. Some of the trends might upscale throughout a season and just evolve at such a rate that the forecasters may have been too slow to predict them as a huge trend at the start. The designer from Matalan observed that the press were the driving force of fashion. They had driven the need for ‘newness’ in magazines such as Grazia, and Heat. Matalan’s London office held press events. The press attended and presented the ideas that drove their sales. For example, Dolce and Gabbana designed the pyjama party ‘look’. The press featured this ‘look’. The press were not reporting on this ‘look’ from a commercial point of view only as a ‘talking’ point. High street fashion leaders such as Topshop incorporated a pyjama theme into their range; no other retailer featured this theme. This created interest in the theme; therefore it could become a trend next season or the following year. The designer gave an example how trends were diffused from the couturiers and copied by the high street set out in Figure 6.1 below:-



**Figure 6.1 The diffusion of a trend**

A designer from H&M observed that as many of the fashion companies expanded, their risks at predicting trends became greater and they relied more frequently on trend forecasting to ensure relevant and desirable products. On a commercial level, for the high-

street, trend forecasting was crucial for creating the collection. However, the fashion industry would not maintain its innovation by relying solely on trend forecasting and for that reason; it should never become the driving force behind the industry.

A buyer from River Island noticed fashion trends repeated themselves every few years, so retailers needed to learn from what had worked previously and update their garments with new detailing and colours. They observed whatever the trend their competitors such as Primark could always beat them on quantity and price. Trend forecasting was not the only driving force of fashion but the P.E.S.T.L.E factors (political, economical, social, technological and environmental) should be considered as well. A few years ago for example, sales in boats increased and sales in people holidaying on cruises, this led to a summer of nautical themed garments being sold in most retailers. During 2013 there was a wave of change with more people leaning towards apprenticeships than going on to further education; this increased sales in work-wear and hard wearing garments such as denim.

### **6.1.7 Trend forecasting and the competition edge**

A buyer from Tesco reported that using trend forecasting information ensured the buying team kept their ranges current and contemporary and meant they were closer to the main high street trends. They used the same forecasting agencies as Marks and Spencer, Next and Debenhams. In these recessionary times, when consumers were shopping they were observing that fashion within Tesco, had competitive prices and therefore would purchase their garments. A merchandiser from Shop Direct reported that their experience combined with knowing their customer needs gave them their competitive edge and using trend forecasting information. The equivalent competition for them would be 'Love Label' a young fashion label by Topshop and designer influenced ranges, such as the 'Savour' range by Monsoon, Berketex, 'Per Una' by Marks and Spencer and 'Definitions' by Warehouse. For design inspiration they observed the high street store All Saints. The merchandiser gave an example of failure to detect the colour trend cobalt blue which was popular one season the buyers had underestimated the order for this colour in their range, resulting in a missed opportunity that season. This was followed by an example for successful colour prediction for the Autumn / Winter 2008, pre-Christmas range, where

purple was the top selling colour, overriding all other sales. The buying team did foresee this trend and reaped the benefits of good sales. The buying team introduced monthly meetings to discuss the improvement of colour issues. These discussions were based on the feedback from monitoring their high street competitors.

A designer from H&M reported they had a very comprehensive in-house trend forecasting team, which had contributed greatly to their success. However, as fashion started to move quicker and response times needed to adjust to this, trend forecasting services had allowed them to keep updated, without them they would have struggled. In terms of trend forecasting giving H&M the competitive edge, this had stemmed from how this information was applied and the work methods in place to react to these trends. Most commercial companies had access to the same information now, so strong company design values and good processes throughout both the design and manufacture of the products allows companies to keep ahead of their competitors.

A buyer from River Island reported they believed they had the competitive edge in some product areas, but sometimes found it was difficult to decide which trends would be successful and which would flood the market and therefore lose consumer interest. Therefore, some trends were introduced in very small quantities, because it made their brand interesting and they believed it gave them the competitive edge. Comparative shopping was regularly carried out in London, in areas such as the Portobello Road. Trends and products in various stores were monitored, for example, Topshop's skater dresses to ensure River Island stayed one step ahead from their competitors for shapes, colour or detailing.

A buyer from ASOS confirmed trend forecasting had given them the competitive edge but noted comparative shopping had also helped by observing stores such as Oxford Street, Topshop. They also monitor and review the top eight returned styles each month to establish traits or patterns on problem garments or failing trends. The designer confirmed they had relied on trend forecasting when creating the ranges but their aim was to move away from trends towards concentrating on the product. ASOS stands for as seen on screen. This was based on celebrity styling, such as Kylie Minogue wearing hot pants, therefore the consumers wanted these garments which were turned around in between six

to eight weeks. Therefore, celebrity was the major influence behind their products. (Anon, 2014).

A designer from Matalan considered Debenhams and Dorothy Perkins to be their competitors but believed they were not as successful in predicting the trends as themselves. However, the buyer gave an example of how a popular trend had been missed one season, where ponchos were popular on the high street Matalan did not foresee this trend in time and missed out on a business opportunity. The buyer observed that Zara and Topshop were the market leaders for fast fashion because they had successful systems in place i.e. a good supply base, order mechanisms and reaction to sales. Matalan were working on issues such as these, in order to improve their critical path.

## **6.2 Supply chain: The effect of celebrity styling influences when planning the garment ranges**

The buyer Participant 7 from Tesco menswear stated celebrity fashion influences were discussed every three months, which was a similar idea to using the catwalk trends. This process termed 'parallel development' was conducted for updating the ranges and making them more exciting. Additional styles were designed for the ranges using celebrity endorsement. For example, leading up to the Christmas season a shirt, tie and waistcoat outfit was promoted in store featuring Ant and Dec. Tesco tended to use the same celebrities repeatedly such as Zac Effron, the Jonas Brothers, Steve Jones and the Kings of Leon. According to the buyer their buying teams were rarely unprepared for new trends when planning the ranges because of the nature of the Tesco market, which had time to adapt to new ideas, unlike for example, Topshop, who had to have a fast turnover of new ideas.

Participant 6, a buyer from Tesco ladies wear was unsure what the question meant regarding the effect of celebrity influence on their range planning process because being at the value end of the chain Tesco tended to be the fashion followers rather than the leaders, so their trends originated from the celebrities wearing the catwalk styles or they selected trends confirmed from the catwalk shows. Strategy meetings were conducted at the

beginning of the season for planning the seasonal range and monthly meetings continued throughout the year to address celebrity influenced fashion. The designer Participant 8 and the merchandiser Participant 9 from Shop Direct confirmed that celebrity 'power' was very effective and the magazines portraying these images. To ensure they used celebrity association effectively they regenerated garments that had been promoted firstly in their catalogue by advertising the garments, secondly in the fashion magazines and thirdly online. A designer from Matalan stated the fast fashion concept had been included into the range as recently as 2009. Their policy was to have a quick turnover of additional garments incorporated into the range to meet the demand for fast fashion. To achieve this, styles were copied instantly from the catwalk collections and celebrity styling. The buyer reported that fast fashion had originated because the consumer craved 'newness' at a budget price, especially in a recessionary climate. A buyer from ASOS stated they also copied celebrity styling and checked the blogs to see if any of these styles had been worn by the consumers. Social media was used for updating their boutique ranges and to scout for new styling ideas. They monitored fashion websites such as Vogue for style inspiration or trend development.

The buyers and designers from River Island tended not to take current trends worn by celebrities too seriously because they could not process these trends quickly enough and by the time they had, the celebrity would have moved on to wearing something different. Accessories were an easier option to work with because they could achieve quicker lead times because the stock was sometimes bought from the UK instead of abroad. Celebrity endorsement on a brand however had had a massive effect. Primark had worked with celebrities such as Cheryl Cole and River Island had recently collaborated with Rihanna, this had showcased them worldwide. Countries that may not have known about River Island before had now recognised them through their association with Rihanna.

A designer from H&M stated that with regard to the core ranges, little changed within their process methods, but they had implemented a quick-order 'buzz-team' who dealt directly with celebrity styling for fast fashion. In recent years, due to both company expansion and the need to react more quickly to fast fashion, product development centres had now been established in Asia, Europe, Middle East, North Africa, North America and South America mirroring the same key functions and format of their head office. This ensured much more

effective communication and a close working relationship with the product, which ultimately brought down the development times.

### **6.2.1 Collaboration when decision making in product design**

All those interviewed recognised the need to be 'open' and the importance of good working relationships and communication. Collaboration on key factors for developing the new ranges involved all in-house people from senior management to designers, buyers, technologists and planners who all attended the various product development meetings. The merchandiser from Shop Direct and the designer from Matalan reported the design team worked on trends and product ranges. They presented their research findings for the new trends seasonally and in-between times reported updates to the buyers. The buyers collaborated with their suppliers throughout the product development process, but mainly any decisions were made by the in-house team.

### **6.2.2 Product lead times**

The retailers interviewed used a variety of suppliers whose manufacturing was based either in the Far East, the Near East or Europe. The Far East suppliers could produce cheaper products than the Near East or European suppliers but their lead times were longer. Tesco used the shorter lead time suppliers more frequently who tended to be in Europe and therefore were more expensive. The lead times varied dependent on product type. Jersey and knitwear products had a shorter lead time than tailoring which is 24 weeks. Matalan built existing lead times around manufacturing in the Far East. They were developing a supply base in Turkey and the Near East. Fast fashion was a new venture for them. The lead time for jersey and woven products was between six to eight weeks from booking fabric to delivery of garments in store. Lead time depended on the product type. Knitwear took the longest lead time, the shortest lead time being jersey products.

River Island's lead times differed between departments for example, footwear from India or China could take nine weeks to produce and then six weeks to get to the warehouse by



shipping, whereas formal clothing (suits etc.) fabric was sourced from the mills first, which took roughly six weeks to get from the mill to the factory and then a further twelve weeks to produce, plus another six weeks for delivery. They had shorter lead times on footwear from Italy and Portugal which was normally six weeks production, plus a week for delivery by road to their warehouse. To improve the lead time for certain garment types such as knitwear, River Island had set up a small design and fitting department in the UK. They manufactured knitwear, plain and printed t-shirts in Leicester within a product lead time of within two to four weeks. Knitwear sourced from Bangladesh had a six to eight weeks turn around. Primark worked to the following lead times for the Far East / India - one month for fabric, one month production, one month shipping. For Europe six weeks with stock, the cloth supplied from countries in Europe such as Turkey. They also operated an 'open to buy' policy.

H&M worked in two seasons and started developing the collection six to nine months before it was due in the stores. The aim was to place orders at the optimal moment, finding the right balance between price, time and quality. Some orders were placed four to five weeks before they were needed in store, other product types such as trend-led garments produced in smaller volumes were required considerably sooner and had shorter lead times. The majority of the fast-fashion team being based in the supplier countries enabled them to achieve much shorter lead times. These departments were usually a lot more concentrated and developed for their purpose. For example, the shoe department was constantly working a few months ahead of requirement in order to achieve the right balance between price, time and quality and also the denim department because of the laundering process involved in garment finishing, which took longer in production.

### **6.2.3 Criteria for quick response**

A buyer from Tesco, Participant 7 reported that 'the buying department had to be ready to resource new ideas; have the fabric ready and top-up supplies. They needed shorter lead time production, the fabric on the factory floor, the colour dyed up and the trim ready, to be in a position to cut and make for production. When fast fashion sells, it is important to be able to repeat the order quickly, using a new graphic or a print to ensure a shorter lead

time with the suppliers' (Anon, 2009a). Tesco could process the fitting and sealed samples in eight to twelve weeks. Quick response was observed as a process the buyers had to adapt to and when a new trend emerged during the season unexpectedly, the quickest route to getting garments into the stores would be negotiated. However, this depended on their factory capabilities for example, ladies accessories and corsages were very fashionable one year and the supply base simply was not able to accommodate production because it required specialist machinery and extra factories. Tesco have strict factory guidelines with regard to ethical and technical auditing, which takes some time to complete (usually a minimum of 3 months) by which time the popularity of the trend had lapsed.

A buyer from Matalan reported they realised there was a need to improve their current system for processing fast fashion. The trends were required to be identified and interpreted into styles more efficiently for fast fashion. Therefore, they were planning the re-organisation of their supply chain in order to reduce lead times ie. the supply base, the planning order mechanisms and the sales reactions. Shop Direct operated their main range trends on a twelve month cycle and realised in order to improve efficiency for fast fashion their business had to be scaled down and suppliers sourced to meet production requirements. Management teams were set up in the Far East and agents were based in Hong Kong, India, China and Bangladesh. They also had a team in the Near East, based in Turkey and Morocco to supply fast fashion.

A designer from H&M reported they used a number of tools to help them plan the garment ranges. The important three were the Boston matrix, the product lifecycle and the fashion triangle. These are used in conjunction with in-house planning tools to make sure they have the right number of articles in the right spread. They do not ever rely on one tool, but use them in conjunction with each other to get a good overview of the collection. The Boston matrix is an analytical tool originally used to aid large companies in decision making in relation to their future potential, annual growth rate and competitive position. This tool adapted by the fashion industry is used to analyse the individual performance of garments sold within the business (Jackson and Shaw 2009). The product life cycle model provides a framework for analysing the response of an innovation over time discussed in section 2.3.1. The fashion triangle model by Abernathy *et al.* (1999) is divided into sections, where the top section of the triangle corresponds to fast fashion products, the

middle section refers to more classic styles and the bottom section applies to basic products repeated year on year. The lead time of each product in the range depends on its position within the fashion triangle.

The buyers from Matalan use an 'open to buy' policy to react to fast fashion, which is product specific. Part of their budget is specifically allocated for fast fashion. This budget is put up front at the beginning of the season. A higher percentage of product time and space is left open more and more to accommodate planning the ranges. For example, for a T-shirt the fabric is ordered in greige state. The style and colour or the placement print would be confirmed closer to the production time. The currency exchange rate is a key consideration in these current times. The combination of whether they committed to the fabric early enough and produced it in the right product at the right time is very important to their budgets. The criteria for quick response were to introduce any new styles in between the seasonal range.

The buyers from River Island confessed meetings were not planned very far in advance to discuss styling for fast fashion garments. The buyers hold 'catch up' meetings during the season to discuss new trend influences taken from blogs, street style, music themes and celebrity collaborations. These trend influences were developed into fast fashion garments. The current best selling styles were re-ordered and produced in new colours. Some of these garments could be manufactured very quickly in their UK factories for example, leggings.

The buyers from Primark reacted to quick response during the season by monitoring sales, supplier feedback and size ratios. They observed traits on the high Street for trends and colour, such as the aviator trend and colour such as, camel. They worked in product types for example, jersey pieces such as leggings which could be produced quickly in new colours. The buyers from ASOS also worked in product types which were quick to produce, mixed and matched the ranges up to create different 'looks' and copied celebrity trends for instantaneous fast fashion. The menswear buying department used to buy ranges every 13 weeks, however the edges have now become blurred and they bought every week. Suppliers were based in China, Europe, Turkey, Italy and Greece so that garments could be made and delivered every few weeks. They relied on good working relationships with suppliers to make sure styles were delivered on time and up to standard. To deal

directly with quick response issues the buyers from H&M and ASOS reported they had product development offices based in the supplier countries, with a similar team in place mirroring that of the head office set up, in order to reduce the product lead times facilitating fast fashion.

### **6.3 Process model: How is the process managed?**

For seasonal fashion inspiration for range development started with the retailers in-house design team putting a trend pack together in preparation for the buying team meetings. Tesco design team issued initial ideas on trends for the forthcoming season. Buyers went on inspirational shopping trips and looked for new product ideas which might also incorporate the new season's trends. Design briefs were created from the bought samples, and the designer's creativity. The information for key shapes was taken from websites such as WGSN. The number of Design briefs was dependent on the amount of space / options so merchandise support was required prior to this, really to prevent un-necessary sampling costs which ultimately would be put back into any price negotiations. Continual meetings took place to discuss the trends for the product types. Brief packs were issued to suppliers for sampling. Samples were sent to the buying teams in order for ranges to be built, again, this was mostly based on newness and updates to best sellers in the new season's colours. Cost prices and lead times were negotiated with the suppliers prior to the sign off for approving the range.

The buyers from Tesco reported they had international buying offices set up with product development teams who sourced and planned the ranges for fast fashion. These were separate teams to those of the UK with most of these buyers coming from Central Europe (CE) countries. In Central Europe it is 50% joint buying, Participants 6 and 7 from the UK buying team reported they all used the same trend pack and adapted it slightly to suit individual countries, such as the Korean market where trends are chosen and engineered from the trend package to suit this market. China and Asia is a new development, these countries want to develop their own products. Each of the buying teams conducted inspirational shopping trips, these tended to be done jointly in the same places i.e. New York and Paris, but then the CE teams also visiting home countries to monitor localised store competition. These teams were able to deal with the latest trends being selected at

short notice and interpreting them into garment styles. Garment production was dependant on the European and Asian locations and their achievable lead times. Products were then sent to the many distribution centres in these locations in order to be dispatched to the stores. Primark and Matalan operated to a similar formula having international buying offices set up for fast fashion, where quick response is dependent upon various lead times from the Far East, India and Europe. Shop Direct operated only in the UK and Ireland.

A designer from H&M reported after the initial trend research had been compiled decisions were taken on what they considered to be the most important garment styles for the season, so as to make sure they had everything covered. Then many development sketches were sent out with as much detail as possible. Samples were then produced and received back. These samples were discussed and comments made from designers working with the buyers and planners to make sure there was the right balance within the range of basic and fancy garments, long and short garments, light and dark garments within the collection. This could be a very long or short process depending on the execution. Continual meetings took place to discuss aspects of the entire collection from what was lacking in the range for their target customer to scheduling which designs would be included into the range, quantities placed and delivery time in store. The designer explained that customer demand in diverse markets and in the different stores determined the distribution of products. The size of a store, the country where it is located and whether it is in a city or small town were taken into account: high-fashion garments produced in limited quantities were sold mainly in cities while modern basics are ordered in larger volumes and distributed to more stores. Meetings are not planned very far in advance to discuss styling for fast fashion garments. The buyers hold 'catch up' meetings during the season to discuss new trends that could be developed into fast fashion garments. They review the current best selling styles, which can be produced in new colours and re-ordered and mostly manufactured very quickly in their UK factories.

For fast fashion a buyer from ASOS reported they bought-in ready-made garments in small quantities in many different styles for the largest majority of their range plan. The remainder of their range was designed in-house seasonally. They sometimes had to include a particular style in the range because they saw it as a 'key piece' or 'trend' for the season for example, the laser cut swimsuit, even if the garment created production difficulties.

This garment proved to be a problem in production, it had a quality issue. For fast fashion styles were often repeated in new colours and celebrity styles were copied.

### 6.3.1 Timescales used in range planning

	<b>Fast fashion weeks prior to garments being in store</b>	<b>Short term weeks prior to garments being in store</b>	<b>Long term weeks prior to garments being in store</b>
<b>Tesco</b>	8-12	12-16	20-24
<b>Shop Direct</b>	6-8	8-10	24
<b>Matalan</b>	6-8	-	20-24
<b>River Island</b>	6-8	2-4 UK manufacture	15-18
<b>H&amp;M</b>	4-5	-	24
<b>Primark</b>	6 With stock fabric	12	20-24
<b>ASOS</b>	6-8	13	20-24

**Table 6.4 Timescales used in range planning**

### 6.3.2 Process model development

The individual process model development for River Island, Shop Direct, Tesco, Primark, Matalan, H&M and ASOS can be viewed in appendix S to Y. Set out below is a summing up of the data gathered from these individual process models and interpreted to represent the use of trend forecasting in a seasonal range planning in Table 6.5 and a fast fashion range planning in Table 6.6.

<b>Retailer</b>	<b>Head of Design Designers</b>	<b>Head of Buying Buyers / Merchandisers</b>	<b>Timeline 12 mths</b>
<b>Seasonal Range Planning</b>	Trade fairs / Comparative shopping Source bought samples, Research trends, details, colour design ideas Liaise with the buyers for design direction Produce trend pack	Travel inspiration, Trade fairs source bought samples Analyse previous sales  Liaise with designers for design direction	Detail meeting every 6mths
	<b>Trend pack</b> Trends, fabrics, colour, shapes Liaise with the buyers on trends styling ideas, colour, fabrics	<b>Main range</b> <b>Transitional ranges</b> Liaise with the designers on styling ideas, colour, fabrics	Range plan meeting every 3mths
	Discuss with buyers fabrics / select prints Liaise with buyers on style direction	Discuss previous seasons styles prints / fabrics selection Buyer make lead decisions over designers - previous sales drives decisions to base new ranges Merchandiser works with teams	Range plan meeting every 3mths
	Range plan discussion with buyers Online trend research - catwalk Images collected	<b>'open to buy'</b> – product specific Range plan discussion / repeat styles, celebrity influenced styling fashion images sent to suppliers	Continual meetings every 3-4mths
		Reviews / Sign-off range plan	

**Table 6.5 Seasonal process model development for range planning**

Retailer	Head of Design Designers	Head of Buying Buyers / Merchandisers	Timeline 12 mths
Fast Fashion Range Planning	Travel / Inspiration / trade fairs exhibitions Street fashion, film, culture, media, trend institutes, trend forecasters <b>Seasonal fashion</b> <b>In-house designers</b> interpret the latest fashion trends	Travel Inspiration / trade fairs Each concept range has its own design team - designers, buyers, pattern makers, section manager Budgets / margins <b>Fast fashion</b> <b>Separate buying team</b> for bought-in fashion	every 6mths  <b>ongoing</b>
	Produce <b>trends pack</b> Monitor trends - catwalk, street, individual style icons adapted to commercial fashion Bought samples Plan design sketches Liaise with buyers for design direction	<b>Seasonal range planning</b> develop themes, colours, fabrics silhouettes / garment types selected Trends and ‘current influences’ adapted into styles - customer profile Samples requested for garment styles Liaise with designers for design ideas Sign-offs	every 6mths
	<b>Separate design team ‘Buzz’ team</b> Monitor - online trends / style influences Liaise with buyers for design direction	<b>‘Open to buy’</b> High-fashion garments - limited quantities / celebrity trends Modern basics - ordered in large volumes / repeated styles Discuss critical path for specific markets / Sign-offs marketing / Photo shoots	every 3mths  Worldwide Production centres <b>Ongoing</b>
		Monitor customer feedback / problem garments	weekly

**Table 6.6 Fast fashion process development for range planning**

### 6.3.3 Series of models

The buyers stated there is not one particular model the retailers use for product development because the fashion business is evolving all the time. The ‘open to buy’ policy is used for the unpredictability of fast fashion. Buying teams need to remain flexible in their approach to make the most of any trading opportunities for new products or



making changes to existing styles for continued production. Fast fashion is based upon a four to six week turnaround dependant on the product type and the origin of manufacture. The minority of products which are produced in the UK can be in store for between two to four weeks. The fast fashion retailers are still producing some garments seasonally with traditional product lead times but quick response is their priority when range planning. The designer from Matalan reported they have various lead times dependant on the product type. The product types are selected as part of either the core range or the mid-range and celebrity fashion is added as a top-up to these ranges. The buyers are currently working on knitwear, woven and core product lead time improvements in readiness for next season. A buyer from Tesco gave a typical example for the product lead time descriptor and corresponding supplier countries in Table 6.7 below;

Product lead times descriptor		
<b>Shortest lead time</b> 6-8 wks	Medium lead times 15-18 wks	Longest lead times 20-24 wks
<b>Western Europe</b>	Eastern Europe	Far East /Asia
<b>Greece / Turkey</b>	Romania / Bulgaria	China / Bangladesh / India
<b>United Kingdom</b> 2-4 wks		

**Table 6.7 Product lead time descriptor**

## 6.4 Summing up of findings

Summing up of findings – Trend Forecast		
Themes	Seasonal fashion	Fast fashion
Usefulness of trend forecasting	<p>Trend forecasting is becoming more important as the consumers are becoming more knowledgeable about fashion.</p> <p>Trend forecasters are too slow to predict and up-date trends.</p> <p>Buyers and designers do not always recognise the impact of a trend at the start of the range planning season. Forecasting information is a useful reference for updating during range planning for trend, colour, styling and fabrics for seasonal fashion.</p>	<p>Trend forecasting should be used to compliment new ideas but not be relied upon entirely as this leads to lack of creativity on the high street as all trend forecasting agencies offered the same trend information.</p> <p>Trend package is heavily relied upon for initial ideas at the start of the season when developing the new ranges. Alternative trend used for fast fashion. (refer to Table 6.9)</p>
Effectiveness of trend forecasting	<p>When developing the new ranges 20% of the range was taken from trend forecasting information to introduce a level of ‘newness’ to the range, 80% was based on the previous season’s best sellers, which provided the evidence on which to base the new ranges.</p> <p>The buyers have no formal method of measuring the success of trend forecasting but have an overall view of sales figures.</p>	<p>Trends are difficult to predict, sometimes they go stale.</p> <p>Some retailers track success rate of items / monitor problems for quality and production issues.</p> <p>Seasonal trend package has become outdated for fast fashion.</p>
Decision-makers in product development	<p>Decision for range planning was found to be buyer led over the designers and merchandising personnel.</p>	<p>Trend information is used for design ideas by the designers, but the buyers lead decisions on the design direction for the range plan.</p>
Inaccuracies of trend forecasting	<p>Trends are sometimes missed during the season by the buyers because their popularity is underestimated.</p>	<p>Online trends are too broad and lack detail.</p>

**Table 6.8 The findings for the trend forecast**

Summing up of findings – Supply Chain		
Themes	Seasonal fashion	Fast fashion
Driving force of fashion	The press drive fashion when reporting on the designers collections. The consumers' craving for 'newness.'	
Competition	Trend agencies had proved reliable in predicting the most commercial trends. The buyers and designers monitor their competitors on the high street.	As fashion companies expand their ranges, the risk for predicting trends becomes greater if they constantly rely on trend forecasting to ensure relevant and desirable products.
Collaboration	The buying team collaboration takes place mainly in-house for decision making on the ranges. Designers are not always kept informed of decisions made during range planning.	For product development to be successful the retailers rely on continual collaboration of the design, buying and production team when making decisions on planning the new ranges.
Alternative trend forecasting	For 'open to buy' celebrity fashion is an extra' input' and is not part of the original trend package, resulting in little opportunity for planning time. Comparative shopping, copying the designer collections and copying from their competitors are used for this process.	The emphasis is focussed on current influences - blogs, copying the catwalk and celebrity fashion influenced styling rather than using traditional trend forecasting information.

**Table 6.9 The findings for the supply chain**

Summing up of findings – Process Model		
Themes	Seasonal fashion	Fast fashion
Quick response	Meetings are held during the season in order to respond to new trends. Suggesting new styles are incorporated on the last minute in an attempt to meet quick response.	As fashion has become quicker, response times have to adjust accordingly.
Managing quick response	Finding suitable countries capable of meeting the required response times is problematic for production. The Far East is cheaper for production but time consuming for delivery. Europe is quicker on both counts but much more expensive.	Product development centres are being set up worldwide to deal with quick response.
Timescales	For ‘open to buy’ - to meet quick response the buying team have to be prepared in advance. To achieve this the buyers are constantly striving towards this by having fabric booked in greige state, so garments can be dyed and styled as required. Consequently planning, timing and the supply base have to be organised without complications. Therefore only a small amount of garments can be produced to this format.	Fast fashion is unpredictable. The buying teams are finding the drawback of quick response to be the timing of a trend, by the time the company has set up the auditing etc. the interest in the trend has been lost. Bought-in fashion is used to supplement the ranges.

**Table 6.10 The findings for the process model**

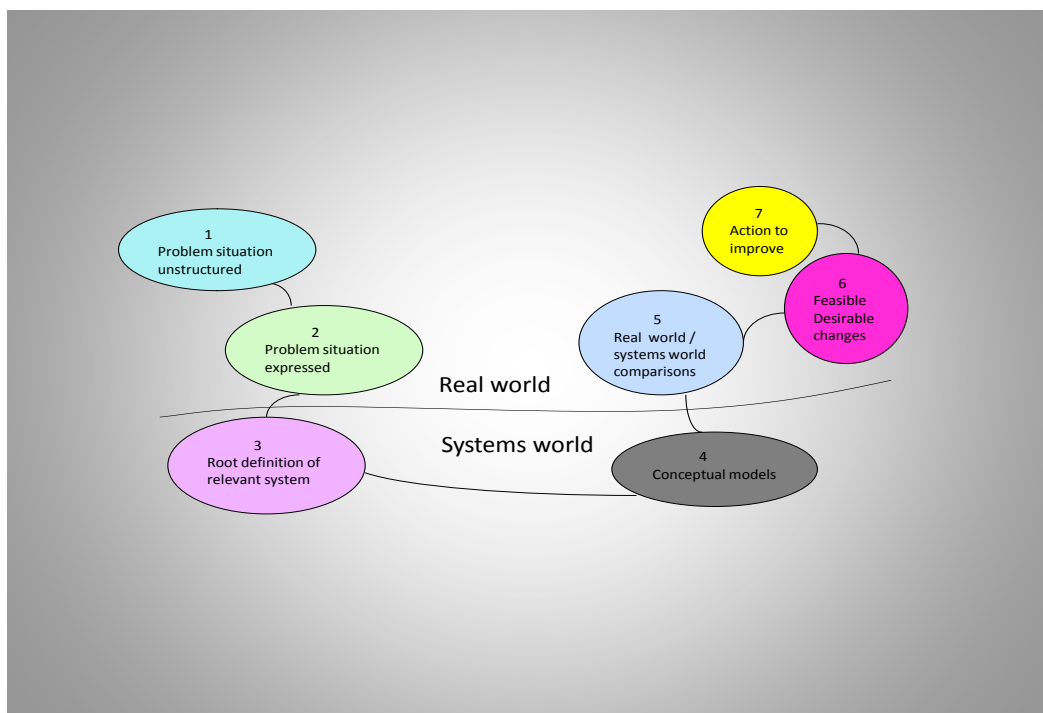
## 6.5 Summary

The case studies explored how trend forecasting was used in the product development process for seasonal fashion and fast fashion. The usefulness of trend forecasting was explored when building the garment ranges and how decisions were made in the range planning process. The criteria for quick response, how this process is managed and the timescales involved for fast fashion are discussed. Themes developing from this data identified how retailers use traditional trend forecasting from the trend package for seasonal fashion and for ‘open to buy’ and fast fashion, alternative trend forecasting is

used from 'current influences' where the designers copy catwalk fashion, celebrity influences and high street competition. When planning the seasonal range it was found there is plenty of time for trend selection, however, 'open to buy' and fast fashion is unpredictable. The buying teams are finding the drawback of quick response to be the timing of a trend, by the time the company has set up the auditing etc; interest in the trend has been lost. The designers are finding the online trends referred to for fast fashion are too broad and lack detail therefore confusing. The supply chain relies on strong personal relationships for collaboration and good communication for successful product development. This is challenging for those interviewed because their supply base for raw materials and garment production is geographically limited. The interview data provided the knowledge base for the trend forecasting process which will be used to design conceptual models relating to theory and practice for new product development and trend forecasting in chapter 7. SSM will be used to build the models, representing the differences between the seasonal and fast fashion models. To fully accomplish the process the conceptual models will require testing, revising and validation by the fashion industry personnel.

## Chapter 7: The differences and limitations between seasonal and fast fashion conceptual models

In chapter 6 the buying interview results were discussed from case studies representing both seasonal and fast fashion retailers. These case studies delved into how trend forecasting was used in the product development process. Themes drawn from the literature review formed the basis of the questions for the primary research interviews. The feedback from these interviews provided the information to develop the conceptual models for trend forecasting. SSM was used to develop these conceptual models representing stage 4 of the system. This chapter attempted to develop systems models showing the stages where trend forecasting was referred to in the product development process. These conceptual models were shown to fashion industry personnel in the buying and design sector, in order to be validated for accuracy and any feedback for contribution to any further improvements. This feedback was used to make changes to the conceptual models. These changes were approached using SSM representing stages 5 of this system and leading to the development of the revised models, representing stage 6 of this system in chapter 8. The SSM model by Patching (1990) is illustrated below in Figure 7.1.



**Figure 7.1 The SSM Model**

**Source: Patching (1990:41)**

## **7.1 Improving the models using SSM as a guideline**

The soft systems methodology (SSM) is a tool which is used for investigating and understanding human activity systems. This system adopted by Patching (1990) has been used to approach this research. The methodology is based upon seven stages that can be used to understand a situation holistically. Each identified stage can be returned to and re-examined to improve clarity to the situation as a whole. In this case applying SSM to understanding how trend forecasting is used in the product development process. All the stages of SSM are fully explained in the methodology chapter.

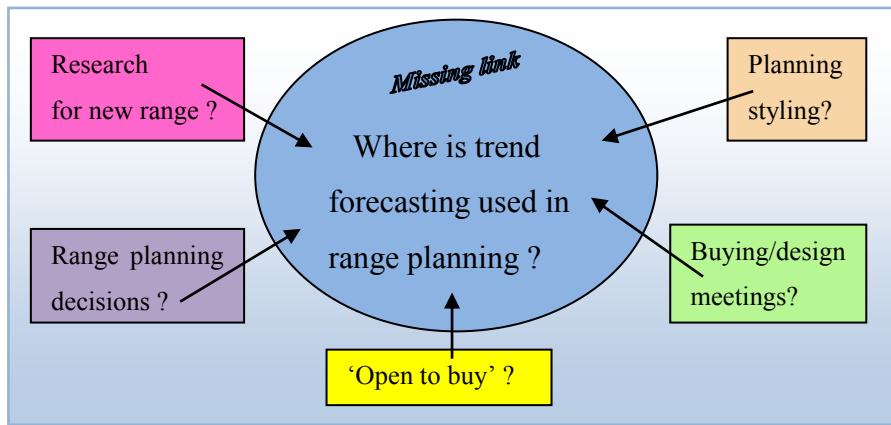
### **7.1.1 Working with the SSM model**

The trend forecasting element representing stages 1 and 2 of SSM were addressed in chapter 5 in the form of rich pictures. The forecasters in the trend forecasting agencies had been interviewed to ascertain the key sequence of events that took place when developing a trends package. This process was not taken any further than stage 1 and 2 of the system because this information was setting the scene for the reader to understand how the trend forecasters develop trends, how the trend forecasting process works and how designers and buyers use this trend information in the fashion industry. It provides the background to how the trend forecasting information is bought by the manufacturing sector and used by the industry. The trend forecasting agency process finishes at the root definition.

However, from the data collected it was possible to construct an initial model, illustrating the process data used to build the trends and the team of people involved. The trend forecasting agency model can be viewed in appendix E. The research then moves on to how trend forecasting is picked up and used in the fashion industry.

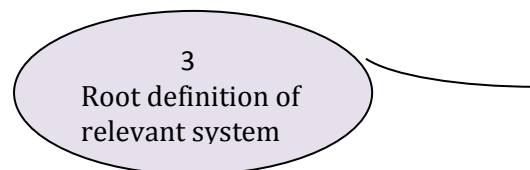
In the fashion industry the problem is a lack of explanation and understanding of the application of trend forecasting within the current product development model. There is no explanation of what stages trend forecasting is used within the current product development model. Current models are all about the buying cycle there is no mention of

trend forecasting in the model planning stages. There is no explanation and understanding of the application of trend forecasting within the current development model. The current fashion forecasting system is reliant on long lead times. Fast fashion affects the traditional buying cycles and production times are challenged. The missing link is to develop models with trend forecasting information required to meet the required timescales for seasonal fashion and fast fashion illustrated below in Figure 7.2.



**Figure 7.2 The missing link**

### **7.1.2 The root definition in the use of trend forecasting in product development (stage 3)**



Trend forecasting agencies provide a service to industry by producing trend prediction packages and online trends. Trend forecasting information is also used within the product development process to aid planning of the garment ranges in the fashion industry. The timing and accuracy of these trend predictions is crucial for retailers in order to be successful and make a profit.



The following two root definitions are applied to the use of trend forecasting in the product development process.

## **Problem state**

### **Root definition**

**Problem** – Trend forecasting information is a tool to be used to aid the planning of the garment ranges in the product development process in the fashion industry.

The trend forecaster cannot sell the trend forecasting package to the industry successfully because of the change from the traditional use of trend information in seasonal fashion to the necessity for meeting quick response in fast fashion.

While trend forecasting information is still being used to aid planning the garment ranges, it is not always used in the traditional way. A different type of trend forecasting information is used taken from the direction of real street fashion, blogs and celebrity influences particularly supported by new technologies. Therefore the question may be asked is the forecasting sector's system now out-moded?

These above root definitions is holistic viewpoints that attempts to define the use of trend forecasting in the product development model. The root definition needs to be clearly expressed and then tested using the CATWOE mnemonic. This testing could be a consistent critical assessment by the researcher for clarity of description and free from any ambiguity or assumptions.

The CATWOE test helps the researcher to further conceptualise the system from different avenues and to further develop the research through iterations to redefine the root definition by testing the original variations so that an adequate encapsulation of the system is achieved. The CATWOE test resulted in a modified root definition given below in Figure 7.3 which has formed the basis of the conceptual models, representing stage 4 of this system. The clients include those who use the system and provide the benefits to their clients. The buyers and designers in the fashion industry can be viewed as the actors that use the trend forecasting information in the product development process.

<p><b>C - Clients</b> / customers of the system who benefit by the output of the system.  Designers, buyers, retailers, garment manufacturers  (Secondary actors)</p> <p><b>A - Actors</b> /carry out activities within the system  The trend forecasters employed by the trend forecasting agency  (Primary actors)</p> <p><b>T - Transformation</b> - that takes place within / because of the system  Product development process - The translation of anticipated consumer desires and /or, inspiration into designs in the product development process</p> <p><b>W - Worldview</b> - how the system is perceived from a particular viewpoint  Designers and buyers employed by retailers use trend forecasting information but do not rely on it entirely because they have to consider their customer profile</p> <p><b>O - Owner</b> of the system / system answerable to / cause it to cease to exist  Trend forecasters, secondary actors (as above in clients)</p> <p><b>E - Environment</b> - world that surrounds/influences system, no control over it</p>
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**Figure 7.3 The C.A.T.W.O.E. test**

**Source : Patching (1990:73)**

These are the clients or customers of the system, those who benefit from the system or affected by the output of the system. The output of the trend forecasting data, if used, is the garment range. The clients include those who use the system or receive benefit from the system. There are personnel in the fashion industry, who use this trend data such as designers and buyers, when designing and planning the range plan. The consumer benefits from desirable products available from the retailers. The more accurate trend prediction was, the more successful the garment sales volume is with the retailer and ultimately the company profits. The benefit could be seen in the negative for the system, if there are errors in the trend predictions for the retailers and sales suffer from inefficiency of the system. According to the retailers interviewed using trend forecasting information had made a significant difference to the outcome of their research. The trend books purchased from the agencies backed up the designers and buyers initial trend research and provided

the evidence to backing up their own ideas, giving confidence in decision making of the trends to be used when planning the new ranges. It assisted the retailers for keeping in-line with their competitors and in judging the mind-set of the consumer.

The actors carry out the activities of the system or provide the benefit to the clients. The actors are the employees, the trend forecasters working in the trend agencies that produce the trends. The designers and buyers are also seen as actors of the system, who use the trend forecasting information provided by the trend forecasting agencies, for inspiration and direction when designing the garment ranges.

The primary actors are the trend forecasters who develop the trend prediction packages within the trend forecasting agencies. The secondary actors are the employees of the fashion industry, who take on the role of the trend forecaster within their company. In the current system the consumer is not an actor, but companies do monitor sales data in order to monitor successful and unsuccessful lines where the system is lacking.

### 7.1.3 The transformation

The input to an output is expressed as a statement. The output is an end product. The input is the components used to produce the output ie. designers' of ideas, materials, and manufacture processes. The components of the input as well as the precise definition of the output are a priority to working out the transformation shown in Figure 7.4 below.



**Figure 7.4 Transformation of the trend forecasting process in a garment range**

Patching (1990) recommended identifying the output followed by the input. The output of the trend forecasting data is the garment range. The trend forecasting data is also an output

of the trend forecasting agency ie. the trend package not just the process. It is feasible to have more than one output. There can be different levels of inputs and outputs. The first output can be identified as the trend package and the second the garment range. The input is the element of the system that is influential in the development of the output. The outside influences used to effect the development of the range. The development stages are the transformation, that is, the conversion of the information sources from the input. The transformation of the trend forecasting process in a garment range is expressed as a statement below.

**Transformation statement** - *A process of continually sourcing data, in a controlled or random manner, simultaneously with thought, decision making and reasoning processes that result in the garment range within varied timescales.*

The literature discusses (in sections 2.2.1 and 2.2.5) the constant demand for new products placing pressure on the established supply chain which relies on seasonal lead times, typically of twelve months in advance of products due in store. Fast fashion relies on continuous replenishment of products in order to meet the reduced timescales required for fast fashion. From the interviews conducted with the buying personnel, discussion concerning the product lead times revealed that the increasing demand for new products for 'open to buy' and fast fashion have been challenged by quick response in terms of production times for manufacturers and buying cycles for retailers. Garments manufactured closer to the UK, rather than the Far East were better options to cope with fast fashion but this relied heavily upon the efficiency in their supply chain.

#### **7.1.4 Worldview**

The worldview looks at how the system is perceived from a particular viewpoint. In this research, the world view is that of the designers and buyers employed by the retailers who use the trend forecasting information in product development. Patching (1990) recommended using the numerous actors to establish their viewpoints based on the research. At this stage it is still the researcher's viewpoint. Key actors were approached for their opinions. This would be to establish viewpoints of the designers and buyers (actors),

who were approached for their opinions and perceptions, this was their personal viewpoint and not a general one. Initially the literature resources were used to determine the worldview followed by discussion with industry personnel was used to produce the conceptual models.

The consensus of seasonal fashion designers and buyers interviewed stated that the trend forecasting packages they purchased gave them confidence in their decision making when choosing the trends for the new ranges, as it backed-up their ideas. The biggest drawback on hindsight was missing certain trends that their competitors had found successful. The fast fashion designers and buyers stated the trend forecasting packages were used heavily to complement their own ideas and judge the general mood of the consumer. The drawback for them was over exposure or over use of certain trends and not being able to keep up with the demand for new trends in the timescales involved for fast fashion. The online trends were too broad and not detailed enough; therefore, it was better not to rely on trends, but to know your customer.

### **7.1.5 The owners**

The owners of the system are those for whom the system is answerable to (or those who could cause it to cease to exist). The actors can be owners if they benefit from the system ie. the buyers and designers who use trend forecasting information. The trend forecasters receive a subscription for their services, which is a benefit, therefore they can be considered as owners of the system as well as being the actors. It is debatable whether the trend forecasters are true owners because without those in the fashion industry that use this service there would be no reason for the system to exist. However the activity of the trend forecasting process would continue within the fashion industry just as it did before this sectors existence.

### **7.1.6 The environment**

The environment is referred to as the world that surrounds and influences the system, but has no control over it. The consumer could be considered as part of the environment. The P.E.S.T.L.E. factors are also a consideration involving the consumer, especially as the consumer behaviour influences the trends as their preferences are claimed to be reflected even though they have no direct influence on the system. Mudpie personnel stated they sell business to business rather than business to consumer. However as a trend forecasting company they help companies understand the consumer by providing ideas that their customer will feel an emotional connection to and clearly the brand or retailer benefits from this by seeing an uplift in sales, which they say is a good reason for investing in trend information. Technological advances in the media and the internet allow access to global influences which has resulted in consumers being socially and culturally more informed, thus raising their expectations for access to new products more quickly. Trend agencies acknowledge that the skill is not in gathering and processing the information, it is assessing the likely speed to market which requires an accurate assessment of when that trend will be at its most important. The economy affects consumer sales. Stylesight personnel commented that if you can pinpoint how current changes in the market, economy, design, culture, etc. will affect the buying patterns of consumers in the future, you can get ahead of the competition.

### **7.1.7 Refining the root definition**

The use of trend forecasting has not been represented in the various stages of the product development model. The aim of the process is to establish a model for seasonal fashion and a model with a shortened timeframe for fast fashion.

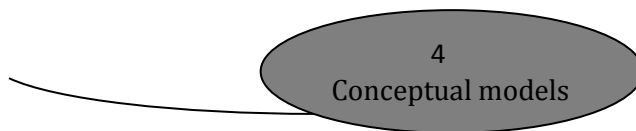
The data collection from UK fast fashion and seasonal retailers' personnel will be used to establish how trend forecasting information is used within product development. Comparisons of the timescales and process used within the design and buying sector of the industry will be drawn to ascertain standard models for product development.

The CATWOE test was used to determine if the original root definition variations adequately represented the full requirement of the ideal trend forecasting methodology. As a result of the test the root definition was modified given below and formed the basis of the conceptual models representing stage 4 of this system.

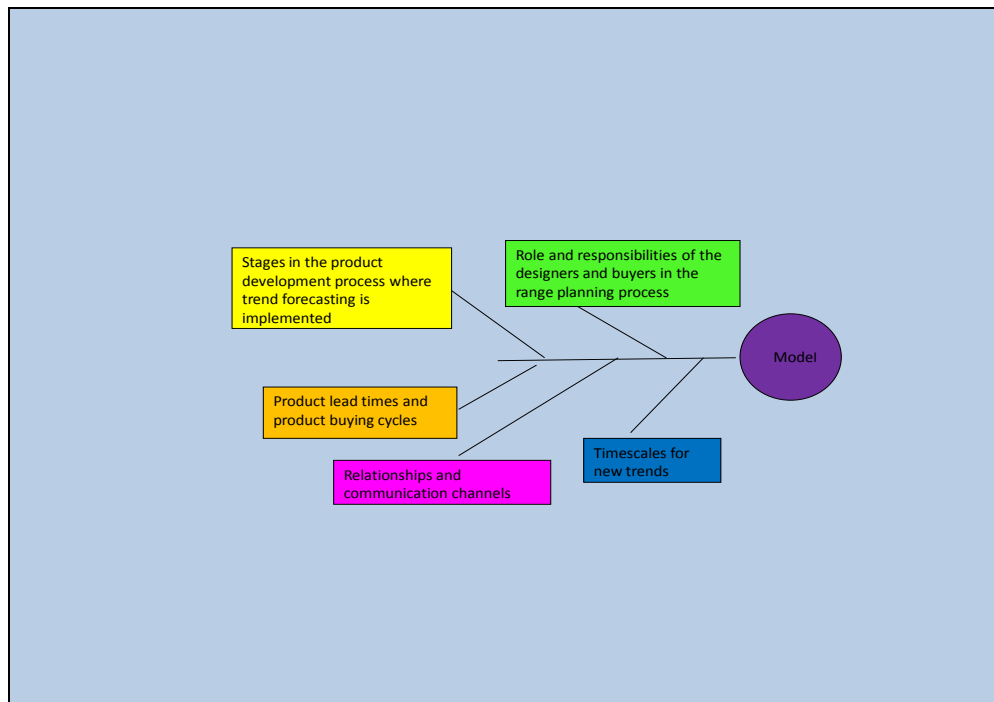
Trend forecasters need to sell and apply supporting data for both seasonal fashion and fast fashion sectors of the market when planning the garment ranges, otherwise they will lose market share. In order to assist the fashion industry, models constructed linking tools with timescales will be used to understand the use of trend forecasting within the product development process.

The benefits of developing these models for companies in the fashion industry is that it will lead to greater efficiency in the utilisation of time, resources and expertise in the trend forecasting process.

### **7.1.8 The conceptual models (stage 4)**



A conceptual model can be formed while working through stage 3 as the transformation element is the basis of the conceptual modelling stage. The model is based on the literature themes represented in Figure 7.5 below.



**Figure 7.5 Themes from the literature**

The conceptual models were built on themes taken from the literature review about the;

- role and responsibilities of the designers and the buyers in the range planning process
- consultation meetings and planning stages that take place within this process
- stages in the product development process where trend forecasting information was implemented
- relationships and communication channels
- product lead times and product buying cycles
- timescales for new trends

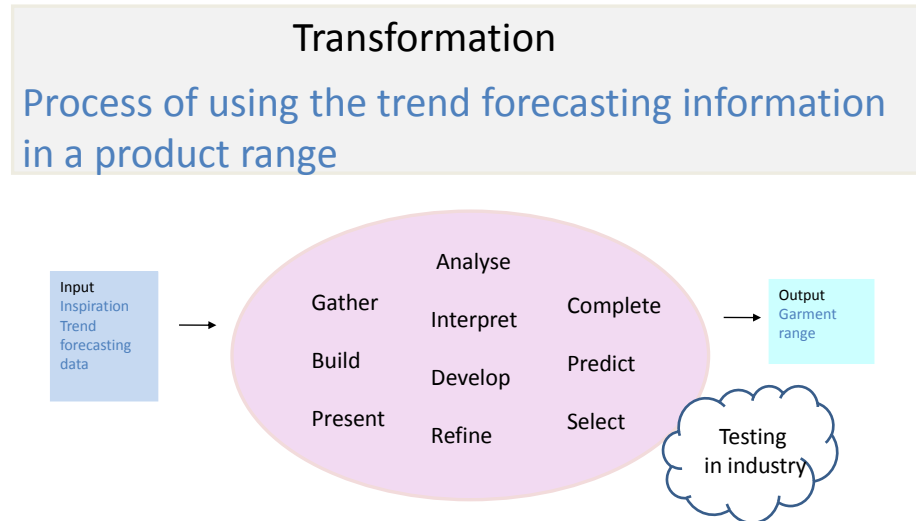
The root definition is expressed by using verbs which make up the components of the input to the output as described in the root definition. The relevant verbs are constructed in a logical sequence of progression for the functions carried out whilst developing the garment range and employing the methodology of the use of trend forecasting in the product development process of the CATWOE test. For example in Table 7.1 below:-



<b>VERBS</b>	<b>Relating to product development process</b>	<b>Personnel</b>
<b>Gather</b>	trend information	Trend forecasters, Designers
<b>Build</b>	a trend package	Trend forecasters, Designers
<b>Present</b>	the trend package to the buyers	Designers
<b>Analyse</b>	sales data	Buying team
<b>Interpret</b>	trend data into styles	Buyers / Designers
<b>Develop</b>	range plan	Buyers / Designers
<b>Refine</b>	range plan	Buyers / Designers
<b>Complete</b>	the range	Buyers / Designers
<b>Predict</b>	trends for 'open to buy'	Buyers / Designers
<b>Select</b>	buzz trends	Buyers / Designers

**Table 7.1 Verbs relating to the product development process**

These relevant verbs have been incorporated into the transformation stage below in Figure 7.6.



## Verbs relating to the development of a garment range

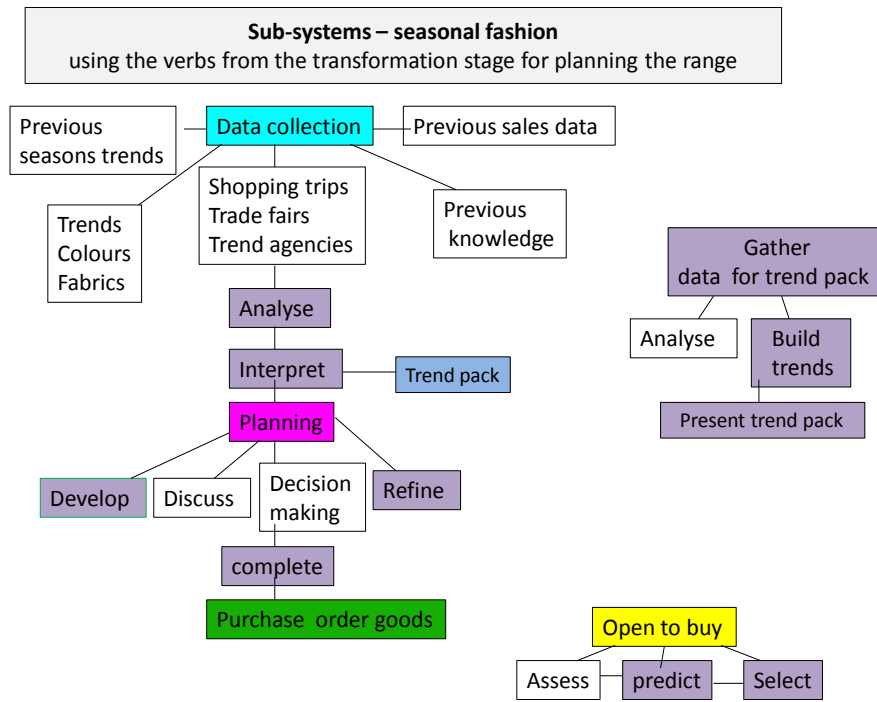
The basic transformation model – the most relevant verbs of developing a range plan

**Figure 7.6 The basic transformation model relating to the development of a garment range**

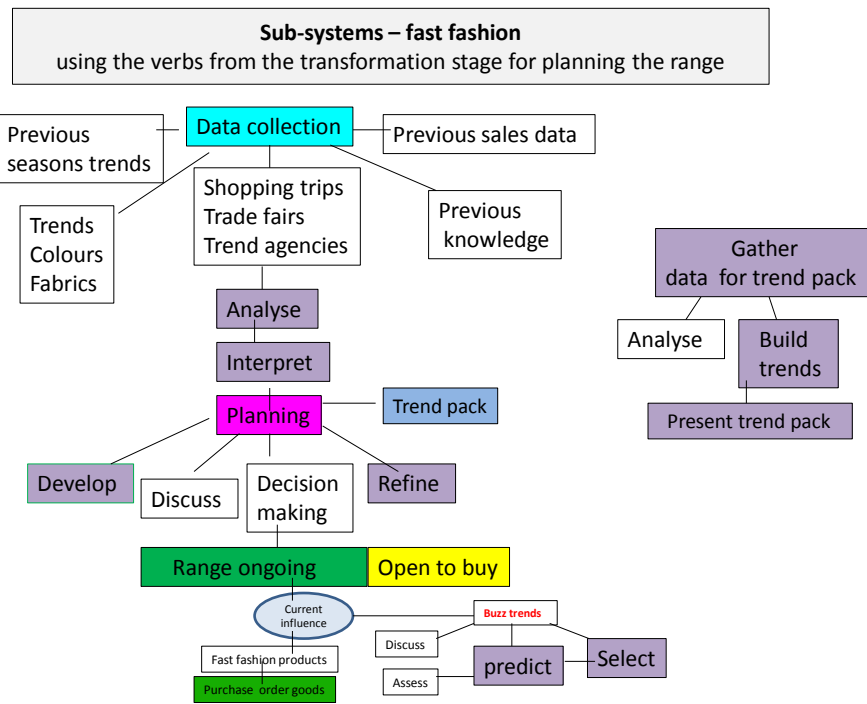
Sub-systems can be recognised in the model. Each sub-system is a system in its own right. For example a set of components that exhibit new properties when working together as a whole, which can be described as the building blocks of the functioning parts. For example, developing the trend package is part of the product development process conducted by designers and buyers. These activities are describing what the functions are rather than how they are carried out. How the activity is achieved is used within the constraints of the root definition. The sub-system is represented as a flow chart below using the verbs from the transformation stage in Table 7.2 below. The verbs also are interpreted into the functions to be carried out in the product development process by designers and buyers in Figures 7.7 and 7.8.

Verbs	Product Development Process
Gather	research for trend package
Analyse	research data of trends and previous sales, <b>build</b> trends
Interpret	trends data into trends pack, <b>present</b> trend pack
Develop	plan and <b>refine</b> the garment range
Complete	range reviews
Predict / Select	‘open to buy’ fashion / fast fashion

**Table 7.2 Verbs interpreted into functions for the product development process**

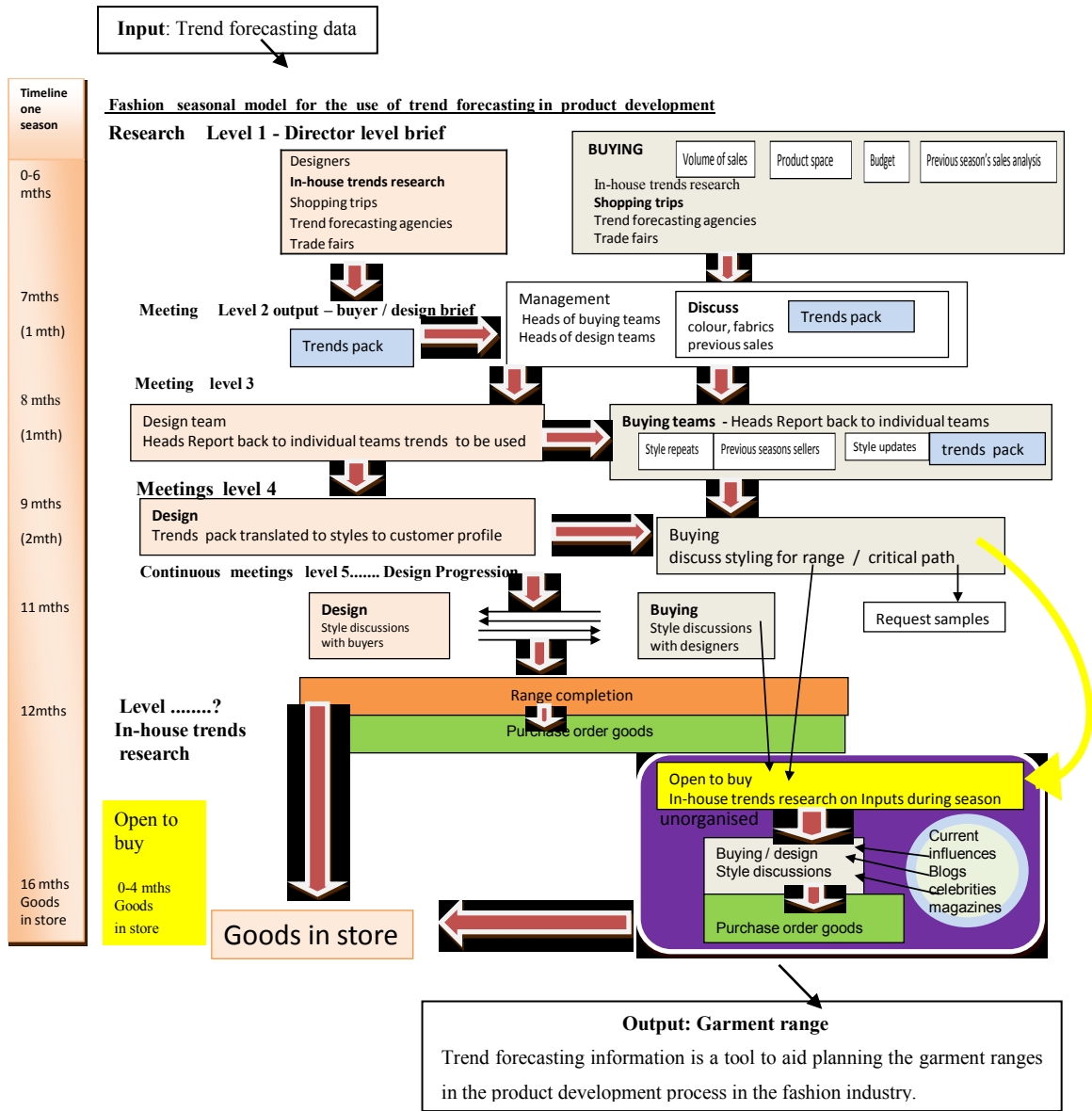


**Figure 7.7 Sub-systems for seasonal fashion**

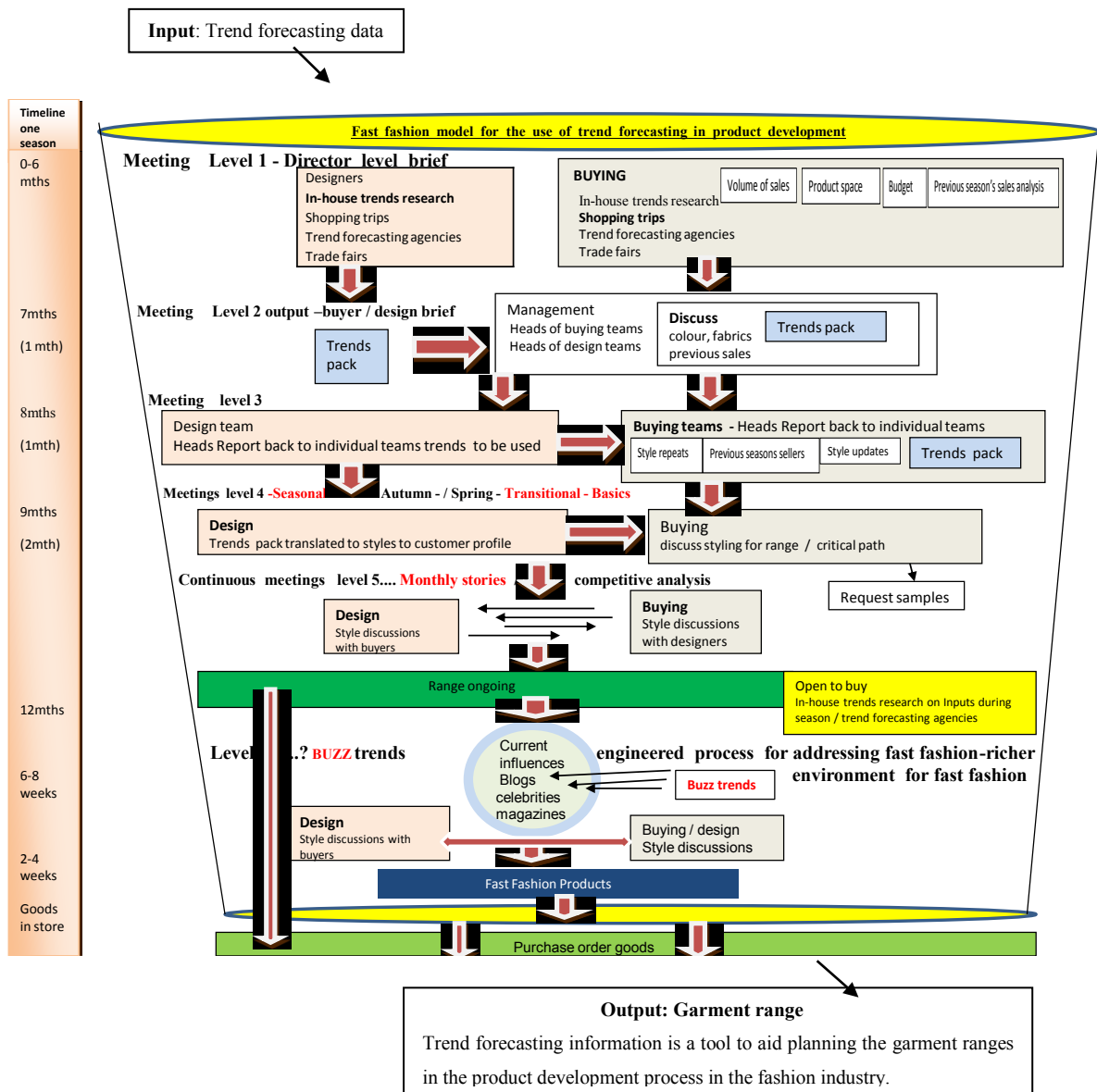


**Figure 7.8 Sub-systems for fast fashion**

From these initial models two further models were developed. The first model, a conceptual model for seasonal fashion and the second model a conceptual model for fast fashion.

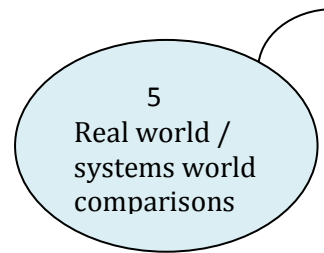


**Figure 7.9 The current seasonal conceptual model**



**Figure 7.10 The current fast fashion conceptual model**

### **7.1.9 Real world / systems world comparisons (stage 5)**



The next step is to compare the models with what exists in reality. Crossing the conceptual world back into the real world, the model is used as a template to determine if there are any mismatches between the actual situation and the model. This was achieved by interviewing fashion industry professionals to test and validate the model in accordance with the requirement of SSM. The mis-matches are recorded in sections, 7.3 and 7.4.

### **7.1.10 Comparing the models back to the root definition.**

For example comparing the conceptual model with what should be in the ideal model. The ideal model should be positive and it should be ensured the model does not have any negative aspects. Patching (1990) states it is efficient and effective and should be a realistic model. Activities that do not appear in the model, may appear in reality. In this case, the seasonal model and the fast fashion model to meet problem routes 1 and 2. In the seasonal model trend forecasting is used to aid planning of the garment range but not for meeting quick response in fast fashion and alternative trend forecasting information is used for the fast fashion process. Two models are required because they represent the differences in the two systems in the models. For example, in the seasonal model the ‘open to buy’ process is mapped out and in the fast fashion model the fast fashion element is represented by the ‘bought-in’ fashion range.

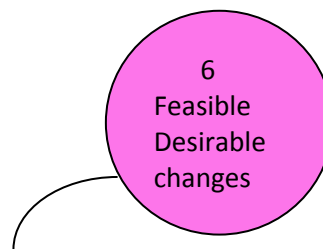
## Refining

The data collection from UK fast fashion and seasonal retailers will be used to establish how trend forecasting information is used within product development. Comparisons of the timescales and process used within the design and buying sector of the industry will be drawn to ascertain standard models for product development.

## Ideal state

Trend forecasters need to sell and apply supporting data for both seasonal fashion and fast fashion sectors of the market when planning the garment ranges, otherwise they will lose market share. In order to assist the fashion industry, models constructed linking tools with timescales will be used to understand the use of trend forecasting within the product development process.

### 7.1.11 Revising the models - deciding changes (stage 6)



The comparison stage should have revealed areas of where improvements may be possible. The next stage 6 was to examine each of these possibilities to see if they were feasible and desirable for example:-

- Feasible - Culturally in light of views / experience of people
- Desirable - inclusion of new activities or strengthening existing ones



These changes are discussed in sections 7.5 and 7.6 where the alternative / route approach taken is explained. The revised models in 7.11 and 7.12 below were developed from the feedback presented from the industry professionals detailed in chapter 8.

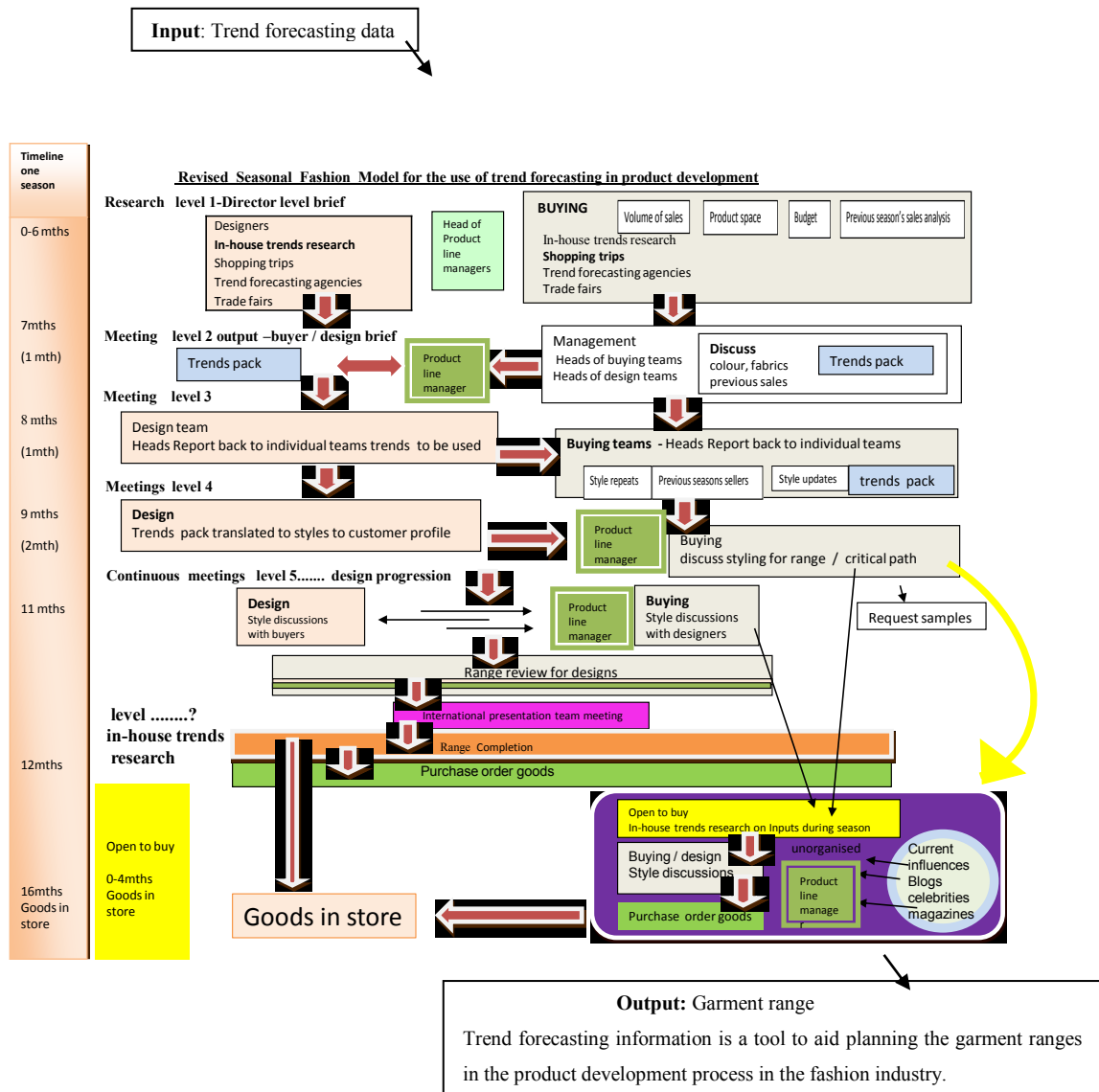
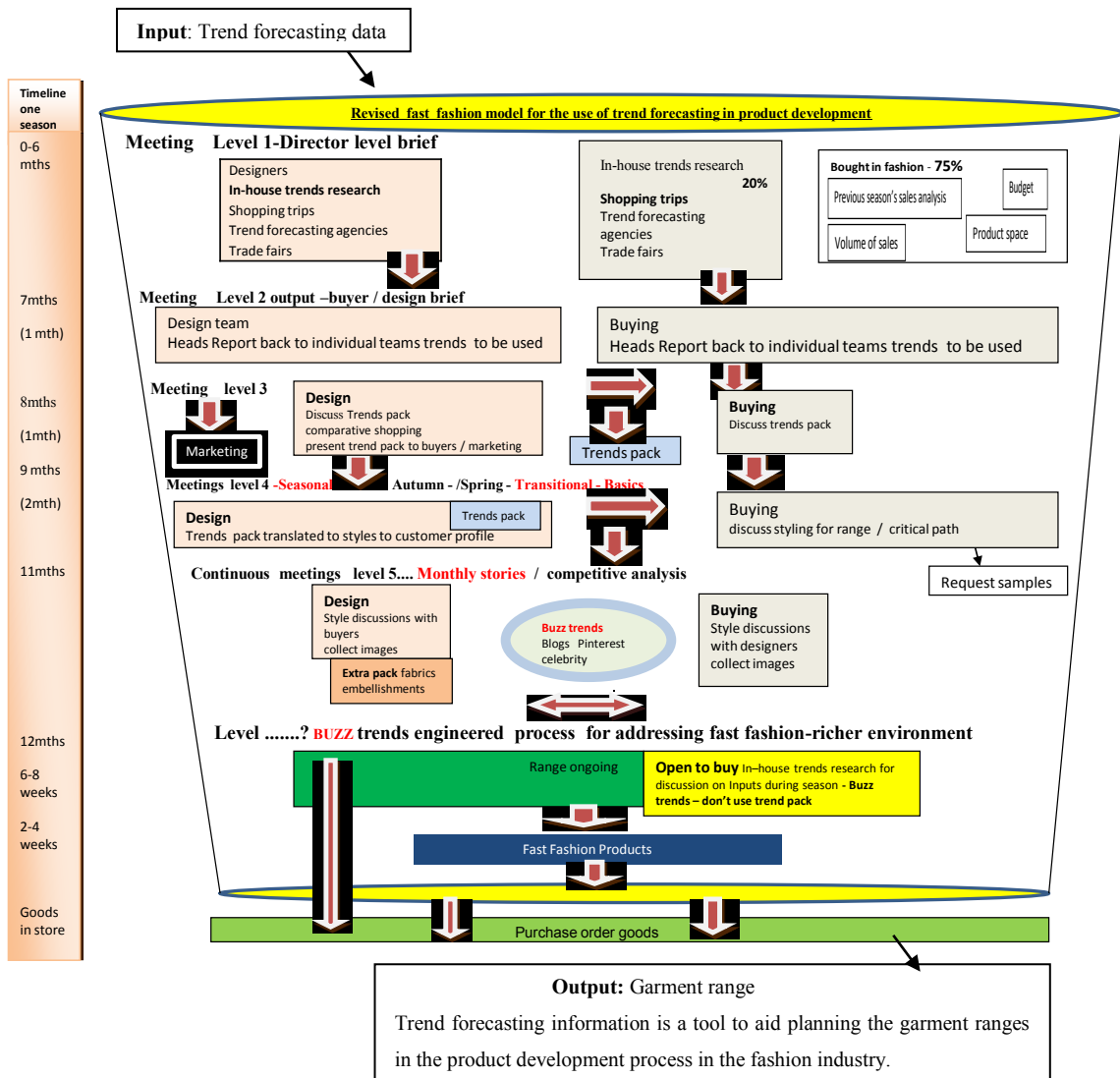
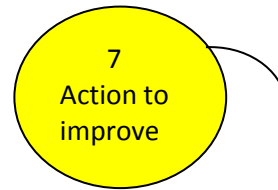


Figure 7.11 Ideal model - Revised model - Seasonal fashion



**Figure 7.12 Ideal model - Revised model - Fast fashion**

### **7.1.12 Actions to improve (Stage 7)**



The changes were implemented into the models to provide further refinement and improvement. This was based on the feedback from the fashion industry professionals which is discussed in chapter 8.

### **7.1.13 Testing the missing link**

The missing link was defined as being able to develop models with trend forecasting information required to meet the timescales for seasonal fashion and fast fashion. The interviews conducted validated the models and determined the models to be a realistic interpretation of the use of trend forecasting in the product development process. The indicated timescales were an accurate interpretation for seasonal fashion and fast fashion.

## **7.2 Testing the models in the design and buying sector of the industry**

Fashion industry specialists were interviewed to gain a real world appraisal of the conceptual models. These included personnel from seasonal retailers such as Mexx, Puma and Bench and fast fashion retailers Boohoo and ASOS. The conceptual model in appendix F for seasonal fashion was shown to fashion buyers and designers from Mexx, Puma and Bench. The conceptual model (appendix G) for fast fashion was shown to fashion buyers and designers from Boohoo and ASOS.

The selection of team members interviewed included a combination of buyers, and designers, chosen to offer a cross section of feedback, wide range of attitudes and opinions from which to draw. The purpose of these interviews was to establish if the conceptual models were a realistic interpretation of the product development process in relation to the use of trend forecasting and convey responses which show the accuracy of the conceptual models for the real world. The knowledge gained from these interviews would provide generic feedback, in an attempt to make a refinement of the conceptual models, in order to establish revised models for trend forecasting for both seasonal fashion and fast fashion.

These following themes were used to develop the questions asked of the buying and design professionals in the fashion industry about the conceptual models:-

- the product development process, in terms of whether trend forecasting information was used at the correct and relevant stages in the model.
- Whether any stages were not represented in either the buying or the design consultation meetings during range development.
- If the timeline suggested for carrying out this process was accurate and realistic.
- How the 'open to buy' policy was facilitated and what percentage weighting was allocated to fast fashion in comparison to the rest of the range.
- Whether this model could have been improved upon at any of the stages in terms of where the trend information was implemented,
- the allocated timescale suggested for a seasonal range
- perceptions as a whole for the layout of the model.

### **7.3 Testing the seasonal conceptual model**

The seasonal model set out in appendix F was discussed in the interviews with designers from Mexx, Puma and Bench. Question 1 asked the respondents to give their opinion as to whether or not the seasonal model shown in appendix G currently represented a realistic interpretation of the product development process when designing the garment ranges. All respondents agreed that the model was a realistic representation of the current product development process. There were certain discrepancies pointed out when working through each of the model levels, such as at level 1, product line was represented at director level as well as design and buying. At level 2 there were also head product line managers working with the heads of design and buying. The design team meetings that discussed products and trends were only held with the product line manager (PLM) at levels 1 to 4, buyers were not included. The design teams met with the buyers at level 5 onwards and not at level 2 in the model. After several meetings at level 5 there would be a range review and then an international presentation team meeting before the range completion stage.

Question 2 gave the opportunity for the respondents to comment on how trend forecasting information was used during the product development process. All respondents agreed that trend forecasting information was used at the beginning of the season when range planning. The levels where trend forecasting was used in the model were correctly represented at level 2 and 3. The trend pack was not represented at any later levels in the product development process. After level 6, during the 'open to buy' stage, influences for trends were taken from the catwalk, fashion magazines and blogs. These comments indicated that these resources were based on last minute decisions and unpredictable trends. It was also highlighted by the designers interviewed that the 'open to buy' policy was built around repeat designs, but in new colours or slight changes to original designs or garments described as 'basic' styles.

Question 3 gave the opportunity for the respondents to comment on any omissions to the model, or any other discrepancies between the model and their methodology. The respondents commented trend forecasting research and decisions on trends to be used was done at the beginning of the range plan. The designers did not discuss trends with the buyers only with the PLM. The buying and design teams all used the same trend pack. At

the beginning of the season, only two or three trends were selected. The garment designs were kept to a simple formula, they invested in simple details on the garments and fabric innovation. The PLM may see a certain style in the market place at any time during the season and decide to incorporate that style into the range.

The product line manager's role was to negotiate with the design teams about products and trends. At levels 1 to 4 of the model negotiation only took place with the design teams and the PLM. These meetings included the heads of design, the heads of buying and the PLM, who all worked together to make decisions about the ranges. However, it was pointed out that at levels 2, 3 and 4 of the model, the trends were only discussed between the PLM's and the design teams. The PLM's responsibility was to liaise with the buyers at these levels on budget information, volume of sales, previous sales analysis, product space and the product range. In the absence of a PLM, buyers would carry out these tasks.

The buyers did all the negotiating about products and trends with the designers. The designers reported to the buyers and presented the product range, the buyers discussed sales and the product range at level 4. The buyers and product managers discussed sales and the designers presented product ranges again at level 5. Puma respondents stated in some cases 50% of the range was presented at level 4 and 50% at level 5. Bench had their concept meeting between buyers and designers at level 3. Two or three meetings would follow, for continued range development and feedback comments discussed by all the team. Simultaneously product line managers conducted costing meetings and discussed last season's best sellers. Two of the designers interviewed reported that the best sellers from the previous ranges and any feedback was taken into account, therefore some of the new garments had little change.

After level 5 a range review meeting was conducted with all the team consisting of the buyers, product line managers and designers to finalise the range. Following on from this an international meeting was conducted, where a mini fashion show was presented of the full range plan. At this stage all the buying teams met to discuss any further issues such as, if any extra garments were required in the range, feedback from the fashion show, products to be selected for the show room or any price amendments to be carried out.

Question 4 endeavoured to discover what percentage weighting of the total range was ‘open to buy’. All those interviewed agreed it was 10% of the total range. These additions were decided upon in various ways. Mexx, for example introduced any additions at level 3 of the model, taken from samples they had bought from the high street. Repeat styles were reproduced in new colours. Bench introduced additions at level 1 of the model; these were tailored for individual clients, such as ASOS or Debenhams or could be just part of the main Bench range. The influences for these garments would be taken from the trend pack, unless the buying team decided otherwise. Additions were discussed at level 3 of the model, about garments buyers had bought on the high street. Puma made their additions at level 5 of the model, which was based on repeat styles in new colours or basic type garments, which reflected any trends they had missed.

Question 5 invited the respondents to explain how the ‘open to buy’ policy was facilitated. Puma, Mexx and Bench respondents commented that any extra garments scheduled for the ‘open to buy’ policy would be based on repeat styles, produced in new colours, possibly with slight changes or new logos, requiring only simple sampling for discussion pre-production. Basic styled garments were introduced at this stage, which reflected any trends they had missed. Investment was in garment detailing and fabric innovation for change rather than garment design itself. They did not plan garments close to the season, they worked on a timeline of four months ahead for goods required in store. Puma respondents stated in order to facilitate their ‘open to buy’ policy they had globally based buyers in the countries of South Africa, the Nordics and Europe. Meetings were held with them every 3 months. The designers presented the range ideas to the buyers and PLM from the trend pack. Mexx / Bench had a similar format, in-house based buyers held meetings every 3 months. They had globally based buyers in the countries in Europe, Cambodia and the Far East to deal with fast fashion.

Question 6 asked the respondents if this model represented a realistic timeline. They all agreed that the six month turnaround was a realistic timeline for one season. Question 7 probed whether the model could be improved in any of the stages to benefit the trend forecasting process in the fashion industry. The changes are set out in the Table 7.3 below. The left column of the table represents the levels represented in the conceptual model and the right hand column represents the recommendations made from those interviewed in the

fashion industry. The highlighted grey boxes illustrate the main changes made to the conceptual model.

Conceptual model – seasonal fashion	Suggested changes to conceptual model
Level 1 Designers Buyers	Level 1 Designers Buyers Product managers
Level 2 Design team produce a trend pack Heads of Design liaise with buyers on trends using the trends pack	Level 2 PLM liaises with designers and buyers Designers discuss trends / products only with PLM Buyers discuss products, trends / budgets only with PLM
Level 3 Heads of design report back to design teams on trends Heads of buying report back to buying team	Level 3 Heads of design report back to design team Heads of buying report back to buying team Heads of product report back to product team
Level 4 Design team translate trends into styles Buying discuss range plan / critical path	Level 4 Design team report back to PLM Buying team liaise with PLM
Level 5, 6 Continuous meetings between design / buying discuss styling for range plan	Level 5, 6 Buying /PLM and design team work together discuss styling for range plan
	Range review
	International presentation / team meeting
Range completion	Range completion
Purchase order goods	Purchase order goods
Open to buy - unorganised style additions Buying led / design	Open to buy - unorganised style additions Buying led / design

**Table 7.3 Conceptual model changes for seasonal fashion**

## 7.4 Discussion : The conceptual seasonal model

In the conceptual model at levels 1 and 2, the designers worked with the buyers to produce and discuss the trends pack. In reality, the PLM liaised with the designers to produce the trends pack. The buyers did not communicate with the designers until level 4 of the process indicating that the buyers controlled the development of the range plan. The PLM negotiated with the buyers and any information discussed was then passed down to the



designers. The response to question 1 concerning the designers and buyers roles being separate in the beginning of the range planning stages indicated that there was lack of communication between buying and design below director or heads level. Communication channels were reliant on strong relationships and good negotiation skills. A third person as negotiator, passing down information could sometimes lead to lack of continuity for decision making in the range planning process. One comment given by the designer from Boohoo confirmed that sometimes communication was very poor and information passed down about the range plan was very sparse. Designers were excluded until level 4 of the model and buyers took the lead on range planning from budgets, previous sales data to what products would be included in the range. It was difficult to determine how important trend forecasting information was or how effective it had been in the decision making process from conversations held because the trend pack was not used after level 3 in the model. Trends were decided upon at the beginning of the range plan, but by level 6 during style discussions the trends had already been out for twelve months. Therefore they would have to rely on very accurate trend prediction with little margin for error. Online trend information could have been consulted but as a designer from H&M had previously pointed out sometimes these trends varied from being too broad or not detailed enough. This could be the reasoning behind why designers and buyers referred to blogs, street style and celebrity for updating the ranges.

Where the respondents were asked if any levels were not represented in the model, the designers discussed one aspect of their methodology, which was that trends were only discussed with the PLM and themselves and not with the buyers, when decisions were made on the trends and products at the start of the season. Another aspect, which the designers commented on, was that for the unplanned part of the range, the PLM observed garments on the high street from the competition, several times during the season; versions of these garments were then incorporated into the range plan, without much warning, ignoring any previous trends discussed with them. The PLM also suggested incorporating trends copied from the high street, trends which had originally been missed. One designer commented that in level 5 and 6 of the process when buyers discussed styling with the designers, it appeared decisions were made with past best sellers given the priority over trend forecasting. During the range review, extra garments were added not originating from the trend pack but again from garments bought on the high street. Other garments

were repeated, orders only offered in new colours or with simple changes made to the original garment design. This suggested they were not able to keep up with quick response timescales necessary to produce completely new products for fast fashion. The trend pack had not been updated since the beginning of the season and was outdated leading to uncertainty and resorting to copying competition.

The 'open to buy' policy relied on unorganised inputs to the seasonal range plan. Although this was only a small percentage of the range, this part of the range appeared to be built on unplanned design ideas and last minute thinking. Additions were based on copying from the high street competition or being reliant on street blogs and celebrity influences, which were unpredictable and required close to season, therefore seasonal trend forecasting was ignored for garments required for quick response. The trends from the trend pack had all been used up and any new trends were not being replaced fast enough.

It appeared the criteria used for dealing with quick response issues linked to fast fashion in the supply chain were minimal. The set calendar of fashion events affected product lead times for manufacturers and product buying cycles for retailers. It challenged quick response in terms of timescales 'open to buy' was at the very end of the process and unplanned. Copying, last minute celebrity influenced styling and simple basics were relied upon to cope with fast fashion. Repeated orders were placed, where not many changes were made to the original styling of garments in order to meet demand. Simple details or colours were changed because then garments could be manufactured closer to the UK or off shore more quickly to cope with fast fashion.

In the conceptual model trend information was only used at the beginning of the season, in reality it was found to be the same because as meetings conducted throughout the levels of the model, attention turned to production processes and garment styling. The trends were not revisited from the trend pack produced at the beginning of the range plan process. The 'open to buy' level of the model was referred to as an extra stage introduced at the end of the model. This comment indicated that this was a separate strategy put in place in an attempt to address fast fashion. However, it appeared that this was very unorganised and the methodology was based on guesswork and unpredictable outcomes. How much of the range plan that was actually fast fashion or could be really referred to as fast fashion was

questionable. This was most likely why fast fashion only represented a very low percentage of the total range, as low as 5% in some cases. These responses posed the question should there be more than one model for product development, one for seasonal fashion and one for fast fashion.

The general layout of the conceptual model was considered to be realistic in terms of timescale and functions carried out. The designer's critical path was not only discussed from the buyer's point of view now but the designers too. Therefore the detail of the design process was included in the model. However, there was no reference to colour mentioned at all. The role and responsibilities of the designers and the buyers in the range planning process was highlighted. There was representation about whom people reported to and how often this took place within a timeline. There was an attempt to record the methodology taking place representing stages in the product development process where trend forecasting information was implemented.

There was also a recording of the sequence of events leading to producing the trend package used for range planning. Consultation meetings and planning stages that took place within this process were mapped out around not only the buying experience, but the designers input as well. All comments were incorporated into the revised models to contribute to the new proposed product development model for the use of trend forecasting in product development for the seasonal fashion model.

## **7.5 Testing the conceptual fast fashion model**

The fast fashion model was discussed with designers and buyers from Boohoo and ASOS using the same set of questions asked about the seasonal fashion model. Question 1 asked the respondents to give their opinion as to whether or not the fast fashion model shown in appendix G, currently represented a realistic interpretation of the product development process when designing garment ranges. All respondents agreed that the model was a realistic interpretation of the product development process. There were certain discrepancies pointed out by Boohoo respondents when working through each of the model levels, such as at level 1 directors and heads of buying discussed proposed new

products in weekly meetings for the bought in fashion part of discussed the range. Directors and heads of buying and design simultaneously discussed proposed new trends, referred back to past best sellers for guidance in planning the new seasonal fashion for the planned range. The garment ranges would be broken down into the following segments:-

- 75% bought in fashion range
- 20% planned seasonal range
- 5% unplanned additions

At level 2 heads of buying and design would pass down all information discussed at level 1 to the buying and design team, for example, discussions that had taken place on trend development. The design team would work on developing a trend pack, holding many meetings with the buying team. The designer's responsibility was to produce the trend boards of all the new trends that could be considered for inclusion in the trend pack. To produce the trend pack the design team also referred to blogs, celebrity style influences, the catwalk and street style. Online observations were carried out for what the competition were doing on the high street, such as Topshop and trend forecasting sites like WGSN and Stylesight were researched. The buying team worked independently on their own trend pack to begin with. From level 3 continuous meetings were held with design, buying and then marketing to produce an early trend pack, which was designer led. The designers named the trends, prepared key garment shapes, drew flats and organised the garment sampling. The trend pack was presented to the buying team for discussion at level 3. All buying and design worked together and discussed trends for the seasonal range plan. The trend pack was signed off at design director level. The completed and approved trend pack was then presented to the marketing team by the design team. At level 4 buying and design team meetings were held, designers discussed styling with the buyers for the chosen trends. At level 5 continuous meetings took place between the design and buying team who discussed the planned seasonal range (20%). Extra books were prepared for these meetings by the design team and were used to guide the buying team on decision making, on:-

- fabrics
- embellishment
- key shapes - tops, bottoms, dresses

The buying team collected fashion images, which were discussed with the design team for additions to the unplanned part of the range (5%), described as ‘buzz’ trends.

The buyer from ASOS stated that the levels represented were accurate for the buying team which represented branded products. They worked separately from the in-house design team. The design team did present the trend pack at the beginning of the season to the buyers, who then used these trends for reference. At level 1 the range was broken down into 70% branded bought in fashion, 20% bought in seasonal fashion and 10% unplanned additions. At level 2 all the team discussed branded goods and at level 3 sales data was a key element in decision making when planning the new product range. At level 4 the critical path would be discussed, prioritised by order of the biggest brand range.

Question 2 gave the opportunity for the respondents to comment on whether the model was a realistic interpretation of how trend forecasting information was used in the product development process. The respondents agreed this model was a realistic interpretation. However, there were differences pointed out in the order of meetings conducted, which were explained in detail under question 1. One of the main differences was that there were more design meetings held to produce the trend pack at level 3. Buying worked together with design at the beginning of the season to produce the trend pack. The buying director and heads worked together at level 1 and discussed the seasons best sellers and budget for the bought in part of the range which had nothing to do with design.

Continuous weekly meetings at buying director level 1 took place to discuss the bought in fashion (75%). This information filtered down via the buying team only. They did not use trend forecasting information; they used Pinterest and blogs, most of this information filtered down the buying team. The designers commented this had led to the lack of efficient communication channels because the design team were not involved in this process.

Question 3 gave the respondents the opportunity to comment on any omissions to the model, such as if any levels were not represented or any other discrepancies between the model and their methodology. The buying procedure for bought in fashion was not represented in the conceptual model. The process followed was described in question 1.

The process set out for producing the trends pack was different to that of the conceptual model. This process was described in question 1.

Question 4 endeavoured to discover what percentage weighting was 'open to buy'. All those interviewed agreed it was 5% - 10% of the total range. This part of the range was unplanned and designed by the internal design and buying team.

- 70-75% of range was bought in styles and accessories.

The designers were not communicated with for this part of the range.

- 20% planned – designed by internal design team

Boohoo did have a seasonal range:-

- Coats
- Halloween
- Xmas
- Knitwear
- Boohoo Boutique range - designer led
- Jeans

The branded ranges from ASOS were mainly planned seasonally, using the last season's best sellers. However the buyer pointed out that for some of the branded ranges, for example, the jeans range bought from Diesel and G-Star the buying capacity could increase from the original order by 20% to 30%.

Question 5 invited the respondents to explain how the 'open to buy' policy was facilitated. They commented that the 'open to buy' policy was facilitated by using buzz trends taken from sources such as Pinterest, blogs, street style, celebrity and the catwalk from the New York and Paris collections. The trend pack was not used for developing this part of the range only impulse buys and celebrity styling influences were concentrated on. Approximately twelve stories were covered, one example being, black all-in-one body suits. A sample would be developed and if the buyers liked it, fit approvals would be done and fabric swatches requested from known suitable suppliers. The company selected the appropriate supplier the style would then be booked and ordered. Suppliers were available in the following regions:-

- Far East
- UK

Styling was divided into:-

- dresses
- jersey
- woven
- denim

ASOS for example covered 14 products in their Autumn / Winter range, samples were requested and photographs taken. Nearly all the 'open to buy' was done seasonally, using repeated best sellers for the branded fashion. If these styles were not doing well after one month, garments would be sold back to the brand or become part of the discounted goods range. Boohoo cancelled orders for unsuccessful garments or discounted these garments.

Question 6 asked the respondents if this model represented a realistic timeline. They all agreed that the timeline set for covering one season was realistic. The time allocated to each of the individual tasks was also achievable.

Question 7 probed if this conceptual model could be improved in any of the stages which would benefit the trend forecasting process for fashion industry. The respondents commented that buying did not communicate efficiently with the designers for the unplanned fashion element of the range and sometimes for the seasonal planned range or confer with them for the bought in fashion range. New products and designs were introduced into the range by the buying team without notice or involvement of the design team. This was a drawback as designers sometimes found they had produced similar designs, which had already been introduced into the ranges by the buyers and as a result their designs would not be required. ASOS respondents pointed out that more thorough research should have been carried out for trends and styling prior to decision making. For example they did 60-70 jeans styles in the range, so which trends should they have followed, it could become very confusing. Dealing with many different countries meant that you really had to know your market to be sure to make the right choices on styling and trend.

The changes are set out in Table 7.4 below. The left column of the table represents the levels represented in the conceptual model and the right hand column represents the recommendations made from those interviewed.

Conceptual model – fast fashion	Suggested changes to conceptual model
Level 1 Buyers Designers	Level 1 Directors for buying / <b>Head Buyers</b> Weekly meetings - discuss 'bought-in' fashion (75%) budgets, products, trends, best sellers  <b>Head Buyers</b> <b>Head Designers</b> Discuss planned seasonal range (20%) Range additions (5%)
Level 2 Design team produce a trend pack Heads of Designers liaise with buyers on trends using trends pack	Level 2 Heads of buying & design forward discussions held on trend development to buying team / design team. Designers produce trend boards of all trends and work on developing a trend pack. <b>Design</b> team refer to blogs, celebs, catwalk, street style, WGSN, Stylesight, check competition – Topshop. <b>Buying</b> teamwork independently on a trend pack.
Level 3 Heads of design report back to design teams on trends to be used Heads of buying report back to buying team	Level 3 Continuous meetings with design, buying and then marketing to Produce an early trend pack (designer led) Designers name trends, do key garment shapes, draw flats, organise sampling. Trend pack presented to buying team for discussion. Buying & design discuss trends for seasonal range. Trend pack signed off at design director level. Trend pack presented to <b>marketing</b> by design team.
Level 4 Design team translate trends into styles Buying discuss range plan / critical path	Level 4 Buying / design team meetings – design discuss styling with buyers for chosen trends for the planned seasonal range
Level 5, 6 Continuous meetings between design / buying discussing styling for range plan	Level 5, 6 <b>Buying / design</b> work together - continuous meetings to discuss the planned seasonal range. Extra books produced by <b>design</b> team for buying team to focus on fabrics, embellishment, key shapes - tops, bottoms, dresses. Buying team collect fashion images, discuss with design team for additions to range.
Range completion	<b>Range ongoing</b>
	<b>Fast fashion products</b>
Purchase order goods	Open to buy - Buying led / design- unorganised style additions
Open to buy - Buying led / design-unorganised style additions	Purchase order goods

**Table 7.4 Conceptual model changes for fast fashion**



## **7.6 Discussion –The conceptual fast fashion model**

The respondents stated that the fast fashion model shown to them currently represented a realistic interpretation of the product development process when designing the garment ranges. There were certain discrepancies pointed out such as at level 1, the director for buying and the heads of buying were responsible for controlling and planning the bought in part of the range and this was discussed by buying only. The design teams had nothing to do with planning this part of the range. The designers being left out of the discussions for the bought-in fashion range led to lack of continuity on how the final range plan would look overall from the designers' point of view. Buying did not always communicate effectively with design for the unplanned range and the seasonal range. New products and designs were introduced sometimes into the seasonal planned range by the buying team without notice or involvement of the design team. This was a drawback as designers sometimes found they had produced similar designs, which had already been introduced into the ranges by the buyers and as a result their designs would not be required, there a wasted effort. Communication channels were poor which reduced the chance for building strong relationships as the buyers and designers did not meet all together until level 4 in the model.

The planned seasonal range part of the range was discussed with design and buying. The seasonal range plan development was designer led in terms of trend development for planning the trend pack. The designers were involved in meetings to discuss the seasonal range plan, and this was where the trend pack was discussed in detail because it was required early to be used for developing the seasonal range plan. There was more design meetings held to produce the trend pack at levels 2 and 3 that had not been included in the conceptual model. Who decided upon the trends chosen for the trend pack was ambiguous, as it appeared the buyers might have taken the lead in the actual chosen trends from the array of trends shown to them by the designers as they had worked independently on their own trend pack to begin with. The designers were however responsible for decisions on naming the new trends, preparing the key garment shapes and organised sampling. Fashion forecasting, trends and designers opinions appeared to be taken more into account and concentrated upon in the product development process by fast fashion retailers due to the amount of meetings planned to produce the trends pack. This process of meetings for

developing the trend pack was not represented in the conceptual model, nor was the buying procedure for bought in fashion. The marketing aspect was also absent and the fact that the trend pack was presented to them by the design team. At level 5 extra books were brought into the meetings put together by the designers focussing on fabrics, key garment shapes and embellishments to guide the buying team on the seasonal range decisions. It appeared the designers were again providing the information but it was difficult to determine whether the lead decisions taken were finalised by the designers or the buyers. This aspect was not represented in the conceptual model.

The 'open to buy' policy relied on unorganised inputs to the unplanned range. Although this represented only five percent of the total range, this part of the range appeared to be built on unplanned design ideas and last minute thinking. Additions were based on copying from the high street competition, street blogs, celebrity influences and Pinterest, which were unpredictable and required close to season; therefore, seasonal trend forecasting was ignored for fast fashion. The trend pack had been used up and some new trends were added to the pack but new trends were not replaced fast enough. The catwalk was used for the designer orientated range, named the 'Boohoo boutique' range which covered 12 stories. The buying team collected fashion images which were considered for this part of the range, this indicated uncertainty, lack of strategy and organisation. The seasonal range incorporated occasional repeats and impulse buys to fill any gaps in the range as a fast replenishment, which involved little change to production cycles and did not affect trend forecasting prediction. Bought in fashion represented 75% of the range and could be construed as a way to cope with quick response issues.

It appeared the criteria used for dealing with quick response issues linked to fast fashion in the supply chain were minimal. The set calendar of fashion events affected product lead times for manufacturers and product buying cycles for retailers. It challenged quick response in terms of timescales. 'Open to buy' was unplanned and facilitated by copying last minute celebrity styling influences and producing simple basic garments to cope with fast fashion. Not many changes were made to the original styling of garments for repeated orders to be able to meet demand. Simple details or colours were changed because then garments could be manufactured closer to the UK or off shore more quickly to cope with fast fashion. Fabrics and production was directed to appropriate known suppliers which

were already in place around the UK and the Far East, who were set up to deal with supplying certain garments categories.

In the conceptual model trend, information was only used at the beginning of the season, in reality it was the same because as meetings conducted throughout the levels of the model, attention turned to production processes and garment styling. Some trends were added to the trend pack at level 5. The 'open to buy' level of the model although incorporated as part of the model, it appeared unplanned because the content was based on guesswork and unpredictable outcomes. How much of the range plan that was actually fast fashion or could be really referred to as fast fashion was questionable because 75% of the range was bought-in fashion. These responses posed the question should there be more than one model for product development, one for seasonal fashion and one for fast fashion.

The general layout of the conceptual model was considered to be realistic in terms of timescale and functions carried out. The designer's critical path was not only discussed from the buyer's point of view now but the designers too. Therefore, the detail of the design process was included in the model. However, there was no reference to colour mentioned at all. The role and responsibilities of the designers and the buyers in the range planning process was highlighted. There was representation about whom people reported to and how often this took place within a timeline. There was an attempt to record the methodology taking place representing stages in the product development process where trend forecasting information was implemented.

The sequence of events was recorded down leading to producing the trend package used for range planning. Consultation meetings and planning stages that took place within this process were mapped out around not only the buying experience, but the designers input as well. All comments were incorporated into the revised models to contribute to the new proposed product development model for the use of trend forecasting in product development for the fast fashion model.

## 7.7 Summary

From the researcher's perspective based on the research carried out, the following points were validated by the industry personnel;

- consultation meetings and planning stages during the product development process
- stages where the trend package was incorporated into the model at levels 2 and 3 for the seasonal model and levels 3.4 and 5 in the fast fashion model
- establish responsibility, communication and relationship channels between the buyers and designers
- fashion designers and buyers approach to the 'open to buy' and fast fashion processes
- time line being correctly represented for seasonal and fast fashion

The interviews for the seasonal and fast fashion conceptual models highlighted the following facts:-

- The PLM was discussed by some retailers as being part of the team. Their role was to liaise with the designers and the buyers throughout the range planning process. The inclusion of this role was dependant on how individual company teams were set up.
- The buying and design roles were carried out separately at the beginning of the range planning process. The buyers and designers did not work together until much later in the model than anticipated. Those interviewed stated from level 4 rather than level 2.
- The trend pack was not used after level 3 in the model.
- The buyers and designers referred to alternative trend forecasting for the 'open to buy' process such as blogs, celebrity influenced styling and copied fashion images from magazines or their high street competition.
- In the seasonal model the 'open to buy' process was referred to at the end of the range planning season, as a separate strategy conducted to address close to season fashion. Therefore, it only represented a very small percentage of the total range plan. In the fast fashion model, fast fashion 'open to buy' was represented as a planned in continual process but still only represented a very small percentage of the total range plan.

- Additional garments were incorporated into the ranges without consulting the designers from level 5 onwards for the seasonal range and the ‘open to buy’ process.
- The season’s best sellers for repeated orders took priority over trend forecasting for ideas for the ‘open to buy’ process, because it was difficult to keep up the fast pace of completely new products for close to season fashion. This process also relied on unplanned inputs based on copying the high street competition.

The opinion considered for the seasonal model highlighted that:-

- The general layout of the model was considered to be realistic.
- There was representation in the model from both the designer’s and the buyer’s about whom they reported to and how often this took place, within a set timeline.
- The sequence of events, consultation meetings and planning stages were mapped out realistically.
- The trend pack development was correctly represented in the model.

The suggested alternative route / approach to the seasonal model was:-

- The inclusion of the PLM’s role in the relevant levels of the model. The inclusion of this role was dependent on how individual company teams were set up. It was found that Tesco, Shop Direct, Mexx, Bench and Puma included PLM’s in their team.
- The range reviews and the international team meeting should be included in the model because in the range reviews garment designs were finalised and in the international team meeting, the product range was presented in a fashion show to the entire team. Feedback discussed by the team at the end of this fashion show finalised the following details;
  - if additional garment designs would be required to be incorporated into the product range
  - price amendments
  - garments to be selected for publicity and promotional campaigns

The opinion to be considered for the fast fashion model highlighted that:-

- The designers had no input into the bought-in fashion range, resulting in lack of continuity as to how the total range would appear. This fashion range was organised by a separate buying team to the rest of the range plan.
- Products designed for the ‘open to buy’ process were based around celebrity styling influences, styles copied from the competitors, repeat orders, or repeated styles with minimal changes, such as simple detailing and colour changes.
- Fast fashion retailers still planned 20% of the product range seasonally and 5% of the range was represented in the ‘open to buy’ process.

The suggested alternative approach / route for the fast fashion model was:-

- At level 1 bought-in fashion should be represented.
- The PLM was not to be included in this model because most of the interviewees consulted stated that the buying team fulfilled this role such as ASOS and Boohoo. However, H&M referred to ‘fashion planners’ which was described as a similar role to that of the PLM.
- The consultation meetings for developing the trend pack in levels 1 to 3 should be added to the model.
- The marketing stage should be incorporated at level 3, where the designers presented the trend pack to the marketers.
- At level 5 extra trend books for fabrics and embellishments should be incorporated at level 5 in the model.
- Fast fashion represented up to 75% of the total range planning, which had turned out to be bought-in fashion. The researcher recognised this as a new development to be added to the model.

The benefits from interviewing industry personnel was it linked process with practice for product development in the fashion industry. The feedback from the interviewees identified that there was a lack of explanation of where exactly trend forecasting information was incorporated into the product development model from both the buying and design viewpoint in the fashion industry. In the seasonal model it was identified when during the season the ‘open to buy’ policy was carried out and how this was facilitated. In the fast fashion model it was established that fast fashion was actually bought-in fashion. This information is not mentioned in the current literature. It was confirmed that the

fashion industry was reliant on long lead times and varying timescales for close to season fashion. Comparisons of these timescales and processes used within the design and buying sector of the industry, have been established from the interviews and used to contribute to the product development models. The differences identified in these timescales and planning stages will be implemented in the revised models for the seasonal and fast fashion in chapter 8, in order to provide new knowledge for the fashion industry.

## Chapter 8: Implementation of the new model in the fashion business sector

In this chapter the suggested amendments are implemented into the models. The revised models were validated again with industry personnel in the design and buying sectors of the fashion industry. The purpose being to confirm the amendments implemented for accurate interpretation from the previous feedback. The interviews highlighted the roles and responsibilities of the designers and buyers in more detail and clarified to whom individuals reported to at the relevant stages within the model. These comments being more relevant to refining the models are identified in the methodology. The final detail of the models was confirmed, these now became the proposed new models, which were developed during the final stage 7 of SSM.

### 8.1. Changes implemented for the seasonal revised model

An addition to the revised model was that of the product developer at level 1 and the product line manager (PLM) at levels 2, 4 and 5 and in the ‘open to buy’ process. This role is illustrated in Figure 8.1 below.

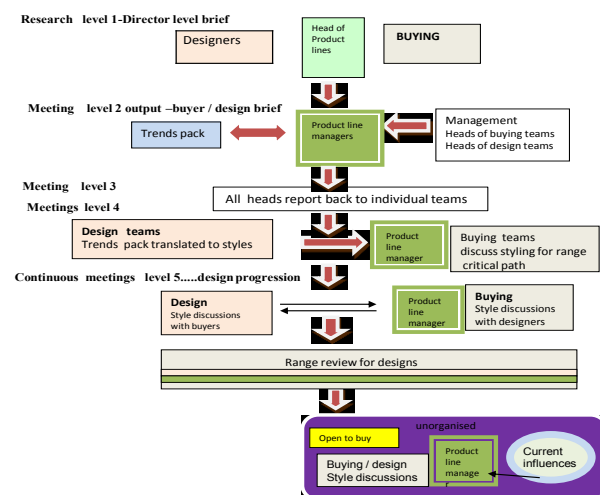


Figure 8.1 The PLM role within the model



After level 5, the range reviews were added to the model. The first range review for finalising the garment designs to be included in the range plan. The second range review was for the presentation of the full range to the international team prior to the range completion stage. These reviews are illustrated below in Table 8.1, showing the team of people involved.

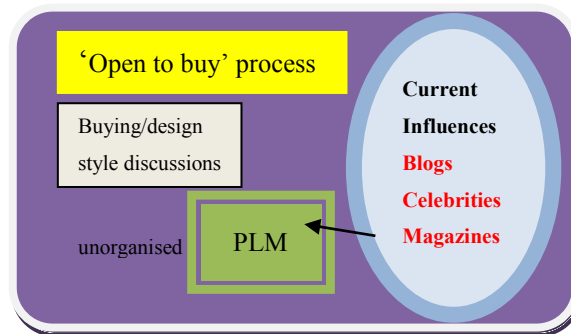
Range Review for designs	Design team
	Buying team
	Product line managers
	
International Meeting	International team
	Design team
	Buying team
	Product line managers

**Table 8.1 Range reviews**

### **8.1.1 Confirmation of the final amendments to the revised seasonal model with industry personnel**

The seasonal revised model set out in section 8.3 was shown to the designers and buyers from Mexx, Puma and Bench to confirm the final details in the models. The questions were asked for confirmation of the accurate interpretation for the addition of the product line manager in the model, the alternative trend forecasting information represented in the ‘open to buy’ process and the incorporation of the range reviews into the model. Broadly most of the feedback supported the model. The questions can be viewed in appendix P. The generic changes to the model covered asked the respondents in question 1 to confirm that the PLM was represented in the correct stages in the seasonal model. They all agreed this was correct. Question 2 gave the opportunity to check if the trend pack was represented at the correct levels in the model. All the respondents confirmed that the trend pack was represented at the correct levels. Question 3 invited the respondents to confirm whether the ‘open to buy’ policy was accurately represented in terms of the alternative trend forecasting information used. All the respondents confirmed that the current

influences were correctly represented. The current influences are represented in Figure 8.2 below.



**Figure 8.2 Current influences used for the 'open to buy' process**

Question 4 asked if the range reviews and the personnel involved were represented correctly in the model. All the respondents confirmed this was correct. Question 5 asked if the terminology used in the model was appropriate and correct. For example, the terminology for describing the ranges as 'seasonal' or non-fast fashion. Puma, Mexx and Bench respondents referred to the term 'seasonal' fashion rather than 'non-fast' fashion. The terminology used was considered appropriate and correct.

The following questions had already been confirmed for accuracy in chapter 7, but were repeated again to re-enforce that these important issues were correctly represented in the model. Question 6 asked the respondents to confirm that the roles and communication channels were correct in the model. All the respondents confirmed that the roles and communication channels were correctly represented in the model. Question 7 asked to confirm the timeline was accurate. All the respondents confirmed that it was accurate. Question 8 gave the respondents a final opportunity to say if there were any stages or levels not represented in the model. The respondents confirmed that all the stages were correctly represented.

Some of the differences in the comments mentioned were considered to be tailored and personal to individual companies, these are therefore not be included in the proposed new model. The comments made by the individual retailers was considered to be important data, not to be discarded and is captured in the models represented in appendix H to J. The respondents agreed to sign a confirmation stating that the model was a realistic

interpretation of the use of trend forecasting information in the product development process and the timeline was a realistic representation for seasonal fashion.

### **8.1.2 The role and responsibilities of the designers and the buyers in the range planning process.**

The first literature review theme related to the role and responsibilities of the designers and the buyers in the range planning process. Brannon (2011) observed that in companies the use of forecasting should be a team effort, with information shared between the design, merchandising, marketing and sales teams, so that the right product was produced and distributed at the right time to the consumer. From the interviews conducted it was found that the design team meetings were only held with PLM at levels 1 to 4 in the model and did not include the buying team. The buying team and design team worked together from level 5 in the model. The PLM's role with the designers was to negotiate on products and trends to be included in the range plan. These decisions had already been decided upon from previous meetings between the PLM and the buying team. The PLM's role with the buyers was to negotiate budgets, previous sales data and products for the range plan. Retailers such as Tesco, Mexx, Bench, Shop Direct and Puma used PLM's as part of the team. However, not all those interviewed referred to PLM's. At Boohoo, the buyers covered all the tasks. Some retailers such as H&M used alternative terminology fashion planners, ASOS, Primark and River Island had merchandisers but they appeared to cover a similar role to PLM's. See table 8.3 and 8.4 for individual retailers' use of personnel. The retailers are diverse; this role found a level of commonality and diversity in this current research but it might not have captured greater diversity than people normally assume.

### **8.1.3 The stages in the product development process where trend forecasting information was implemented.**

The second literature review theme in relation to the stages in the product development process, in particular where the trend forecasting information was implemented. McKelvey and Munslow (2008 and 2012) discussed trend forecasting and the role of the trend

forecaster but not actually when apart from the beginning of the season trend forecasting was referred to. In the revised model, the trends research for the trend pack was represented in level 1. The planning stages and liaison for developing the trend pack in level 2 and 3. In level 4 the trend pack was used for translation into garment styling. At level 5 further discussions took place over several meetings for style progression and sampling for the seasonal fashion range. Traditional trend forecasting was omitted in the revised model for the 'open to buy' process because at this point in the seasonal timescale, the trends from the trend pack had already been out for twelve months and were considered outdated. During this process trend forecasting information from a different source was referred to, for example, Tesco, River Island and Matalan referred to celebrity styling, celebrity collaborations and catwalk styles being used for this process. A designer from H&M commented for this process they referred to street blogs, the catwalk collections, fashion magazines and celebrity styling for updating their ranges but not online trends because they were too broad and not detailed enough for close to season planning. See Table 8.3 and 8.4 for individual retailers trend forecasting resources.

Goworek (2007) and Easey (2009) offered the view that from the buying department's point of view there was a review of sales figures and that the garment range was based on the last season's performance, revisions to existing product lines and the incorporation of new products. Therefore placing this procedure above that of the trend forecasting resource. In the interviews conducted with Tesco personnel it was confirmed by the women's wear buyer, that the current season's sales were analysed on an ongoing basis so that the best sellers were continually updated or repeated, volumes were increased on the previous year or season and key shapes would be re-coloured in order to look new. For example, in lingerie and swimwear, the basic shapes remained the same, although colour, trims or fabrics were changed influenced by the new season's trends.

There was a framework in place (a set number of existing items to be replaced) and a budget, plus last season's successes was looked at. Price and previous 'best seller' was ranked first, second, poor sales items were removed and third was the capacity for new items. The women's wear buyer stated the range had become quite formulaic in terms of planning as each department was given their space allocations, and so only a set amount of products would ever be able to fulfil this. The menswear buyer stated that there was a

similar formula when planning the new ranges on menswear in particular the move on from the previous season was rarely that drastic. For example, repeated garments in a new colour or with new graphics for updating the range. Tesco being at the value end of the chain considered themselves as fashion followers, stating that they were not a ‘Topshop’, therefore they often reused the same celebrities because their customers required time to get accustomed to new styling ideas. See Table 8.3 and 8.4 for individual retailers policy for updating the garment range.

The buyer from Shop Direct stated that 80% of the new seasonal range was planned from best sellers. The designers interviewed from Matalan, Mexx, Puma, and Bench pointed out that the best sellers from the previous ranges was taken into account, therefore some of the garments had little change, suggesting trend forecasting had lesser importance in the process. See Table 8.3 and 8.4 for the percentage split for seasonal fashion.

#### **8.1.4 Relationships and communication channels**

The third literature review theme related to relationships and communication channels where Tyler *et al.* (2006) suggest the need to develop strong personal and organised relationships in order to produce a culture characterised by common goals, trust and mutual interest. From their case studies undertaken several weaknesses were found from inadequate product development, to weaknesses in design, production and marketing relationships. In the case studies conducted by the researcher weaknesses were found in the product development process of Matalan, River Island and Tesco. Matalan personnel stated response time for close to season fashion was inadequate because their supply base for raw materials and garment production was geographically limited. River Island and Shop Direct personnel observed they were unorganised in their ‘open to buy’ process, because their trends and styling ideas were unplanned for close to season fashion. Therefore, any predicted buying volumes were found to be inaccurate across the garment types and production timescales were not fully met. River Island had set up a small UK manufacturing base to aid quick response for close to season fashion, but this was limited to only producing basic knitted garments such as t-shirts and leggings.

Tesco personnel found predicted buying volumes had been underestimated for some garment styles by the buyers. These styles had sold out in the stores and Tesco's factories were incapable of replenishing these styles fast enough in order to meet demand within the required timescales. This first problem was put down to lack of confidence by the buyers when decision making on targeting volumes for the new garment ranges. This was because they were unsure if they had chosen the right fashion trends for this new garment range. The buyers lacked conviction because these trends had been predicted so far in advance of the season. The second problem was down to Tesco being dependant on their factories capabilities, some garments had proved more difficult to produce than others therefore, production and timing were affected. For example, formal shirts were more difficult to produce than jersey products. Another example was given where a few seasons ago, ladies accessories and corsages became extremely fashionable, but Tesco was unable to produce these products because they did not have the required specialist machinery and factories. Weaknesses in the design process were prevalent with all of those interviewed. For example, Shop Direct, Matalan, Mexx and Bench personnel observed on hindsight that they had not recognised the potential success of some trends and colours predicted by the trend forecasting agencies when planning the seasonal fashion range. Matalan and Shop Direct personnel observed they sometimes missed key garment trends or crucial colours of the season. For example during one season, the colour cobalt blue was a successful colour for knitwear. Their competitors on the high street were selling a simple styled cardigan in cobalt blue. The realisation they had missed an opportunity came too late. Another season, ponchos were seen everywhere on the high street and Matalan did not foresee this popular trend and lost business.

River Island design personnel had admitted they were weak on trend selection and recognised in some cases, popular trends had proved unsuccessful due to over exposure of the trend and had resulted in poor sales. For example, one season the military trend was chosen. This trend had been used numerous times in the past and garments produced from this trend had always been successful. This particular season new garments had been produced, a khaki coat with black PU sleeves and a camouflage jacket for both the menswear and the women's wear ranges. Many retailers had stocked similar garments in the military trend that season but the River Island garments proved to be very unsuccessful with their customers.

A Puma respondent had accepted they found trend selection difficult to predict for the unplanned close to season fashion. Therefore, the buyers confirmed that they bought samples from the high street, copied images from magazines which were interpreted to suit the customer profile for this process. The amount of copying from celebrity styling, couturiers, high street competition and repeated 'best sellers' that were produced by these retailers interviewed illustrated the lack of individuality and creativity on the high street.

The buyers from Tesco stated trend forecasting definitely helped them to keep up with their high street competition and ultimately ensured that they produced the garments and accessories the consumers were seeing on the catwalk, from the celebrities and in the fashion magazines. They were however, unsure if they had selected the most appropriate trend information, which would result in the customer spending their money with Tesco rather than other stores, who, optimistically may have missed a particular trend. When selecting the trends to be used when building the garment range, the buyers referred to finding the 'recurring theme' which instilled confidence in the trend selection, when the trend was seen first in the trend books and then again at the trade fairs. The aim was to select trends or themes suitable to their customer profile for example, the military shirt or slim suit theme. Tesco buyers focussed more on key garment shapes from the trend books such as jackets and shirts for menswear. Single garments and accessories were then coordinated to create a 'look' at their press days. Photographs illustrating these 'looks' were taken and displayed in their stores.

There were errors highlighted from using trend forecasting information. The buyers from Tesco admitted they occasionally missed some trend predictions and other times they had predicted the right trends but had not bought enough, in terms of quantity, garments in those trends. The buyers attributed this to lack of confidence in decision making in selecting the right trends. In their attempt to capture as many trends as possible, some trends had been lost. However, this problem was linked to production issues as well. For example, the buyer had stated that formal shirts were more difficult to produce than jersey and other shirt products. The production of new garments depended on timing in order not to sell out, specialist machinery and factories with available capacity. These were some of the issues faced by Tesco which had been discussed during their interviews. See Table 8.3 and 8.4 for individual retailers responses to trend selection for seasonal fashion.

Marketing relationships were found to be weak. In all the interviews conducted by the researcher it was found that the buyers did not communicate with the designers until level 4 in the seasonal model regarding the development of the new range plan. The heads of buying and design had co-ordinated together from level 1 in the model on decisions concerning budgets, sales volumes, fabric sourcing and trends for the new range plan. However, when this information was passed down by the heads of the teams to the rest of the teams, the buying and design teams worked independently. The designers worked on the trend pack development and the buyers worked on budgets, sales volumes, fabric sourcing and trends for the new range plan. The designers interviewed from Puma, Shop Direct, Matalan and River Island explained that they had discussions on the trend pack development with the buyers, but there was a lack of communication from the buyers on the detail of these discussions. For example, discussions on proposed new styles or background decisions, that may indirectly affect them regarding the new range at levels 2 and 3 of the model.

The buyers interviewed confirmed any decision making about the new range plan took precedence with them over the designers. The buyer from Tesco had stated the decision weighting was 50 / 50%, but the rest of the buyers interviewed had indicated the weighting was definitely buyer-led. It was found that there was a lack of collaboration in the 'open to buy' process because this procedure was unorganised from the designer's point of view according to personnel from Puma, Shop Direct, Matalan and River Island. For example, the buyers bought samples from the high street. Interpretation or copying of these garments was undertaken by the buyers and added to the range without consultation with the designers, causing confusion and lack of continuity between the buying and design teams. See Table 8.3 and 8.4 for individual retailers use of resources for the 'open to buy' process.

### **8.1.5 Product lead times and product buying cycles**

A fourth literature review theme was with regards to product lead times and product buying cycles. Diane and Cassidy (2005) observed conventional timescales required by industry to produce fabric and garments and selling them to retailers meant that forecasters worked two years ahead. It was found from the interviews conducted that the seasonal



fashion retailers also planned their garment ranges to fit in with this set calendar of fashion events, but they were also aiming to keep abreast of fast fashion. The 'open to buy' policy was used to facilitate fast fashion, undertaken once the seasonal range plan had been completed, represented after level 5 in the seasonal model. Here extra garments were incorporated into the range close to the season. This 'unplanned' part of the range relied on 'unorganised inputs', where design ideas were copied from the high street or taken from celebrity influenced styling and blogs. Tesco, for example used celebrities such as Zac Effron, the Jonas Brothers, Steve Jones and the Kings of Leon. A shirt, tie and waistcoat influenced by Ant and Dec were sold in store at Christmas.

Matalan used celebrity fashion, influenced by trends from magazines such as Heat, Grazia, Look and the Sunday supplements. For example, the vintage trend, was interpreted into garment styles such as the 1970's jumpsuit and the maxi dress. These trends because of their celebrity association provided re-assurance to the buyers for using them. The buyers and designers from River Island emphasised how celebrity endorsement of a brand was extremely beneficial to them, for example, collaboration with Rihanna, had given them worldwide recognition, countries that had not known about River Island before, now recognised them through their association with Rihanna.

River Island's criteria for quick response was unorganised. Meetings were held discussed emerging trends from the high street, bloggers and celebrity influences, such as Jessie J. Buyers held catch up meetings, which suggested lack of planning. New style trials were carried out on any garments that sold well, such as leggings, t-shirts, dresses and skirts these would be re-ordered in new colours. Accessories would be bought in. This was not true fast fashion because their strategy was built on repetition, and not fashion trend. Matalan personnel stated that they used the 'open to buy' process as an opportunity to react to fast fashion, which would be product specific. A higher percentage of product time and space was left open more and more to accommodate fast fashion. Fabrics were committed in advance and booked in grey state for garments in simple styling such as t-shirts. Style, or placement print and colour would be confirmed closer to the production time. These designs had to be kept to a simple formula in order to be produced quickly to meet the short timescales necessary for close to season fashion.

Tesco, for example personnel explained they invested in repeated garment orders, repeated garments in alternative fabric choices, or easy amendments to existing garments such as simple detail changes. The buyers had to be ready with these garment ideas, the fabric had to be dyed up in the required colours and the trimmings available, so that the garments just needed to be cut and made in the factories. Fitting and seals could be done in eight to twelve weeks with a short lead time for production. When fast fashion sold well, the buyer stated, it was imperative that garments could be repeated quickly, using a new graphic or print. This was the basis on which they coped with quick response for close to season fashion. The designers interviewed from Mexx and Bench pointed out they were aware of all the repeated styles produced, that were only offered in new colours or with slight changes to the original designs described as ‘basic’ styles.

### **8.1.6 Timescales for new trends**

The fifth literature theme regarded the timescales for new trends. Eundeok *et al.* (2011) stated that various professionals in the fashion industry such as executives and managers from retail buying used the fashion trend forecasting information to establish long term marketing strategies, whilst designers and merchandisers used it to develop products for specific selling seasons. Easey (2009) recognised that the frequency of the planning cycle in the fashion industry was due to its seasonal nature. Traditionally companies had planned two seasons a year, but they were now also incorporating mid-season product ranges. Keiser and Garner (2007) defined the trade shows as the foundation of the textile and apparel sales calendar and these were also planned on a seasonal basis. Fast fashion had had a knock-on effect with the timing and competitiveness of the various trade shows, (Hines and Bruce 2007) stated that the move towards fast fashion had influenced some trade shows to exhibit closer to the season and others to become more aligned with their competitors. For example, the timing of Expofil and Première Vision (PV) had changed recently, Expofil use to show a number of months before PV, now they showed simultaneously to be more aligned.

The seasonal fashion retailers interviewed confirmed that approximately 80% to 90% of the garment range was still designed seasonally, with adequate time for designing and planning. The remaining 5% to 10% was left open for garments required close to season, described as the ‘open to buy’ policy. Garment styles and quick response were

requirements to meet this policy. The limited planning timescale involved was a problem for the traditional seasonal fashion retailers, who were used to a pre-planned season and not constantly trying to keep up with producing constant garment styles in new trends within reduced timescales, alongside their competitive fast fashion retailers. See Tables 8.3 and 8.4 for individual retailers ‘open to buy’ percentage.

Matalan personnel acknowledged they needed to improve their current system for delivering fast fashion timescales. Investigation was ongoing for the improvement of planning methods, order mechanisms and sales tracking in their supply chain to reduce lead times. Their criteria for quick response were that turnover had to be between six to eight weeks, and extra garments in new styles had to be introduced in between the seasonal ranges. Their women’s wear ranges were manufactured in Turkey, which provided quicker production time, cheaper shipping and delivery costs because of its close proximity to the UK market. Retailers used Europe as a supply base for delivering products with short lead times for fast fashion. For example, one season River Island sold a footwear trend which became extremely popular, but they had not ordered enough stock. The original suppliers were in India and China the lead time was too long and the stock had to be replenished as quickly as possible to meet customer demand, therefore the footwear was re-ordered from suppliers in Portugal and Italy. See Tables 8.3 and 8.4 for individual retailers problems related to ‘open to buy’.

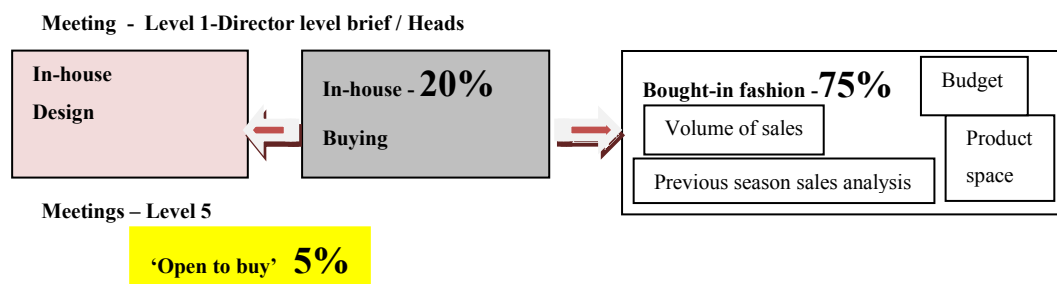
Shop Direct personnel confirmed they predicted production time and space allocation in advance for garments planned for their ‘open to buy’ process. However, these allocations had proved difficult to predict and found to be inaccurate, consequently they had to be constantly increased to accommodate the production of these garments. This was due to the many factors that had to be considered prior to production, which is illustrated in the Table 8.2 below:-

Garment	Detail	Requirements in advance
T-shirt	Placement print	Fabric booked in advance in grey state
		Placement print confirmed close to the production time
		Colour confirmed close to the production time booked in
		Production time booked in advance according to volume of products
		Supplier country / factory

**Table 8.2 Pre-production requirements for a t-shirt**

## 8.2 Changes implemented for the fast fashion revised model

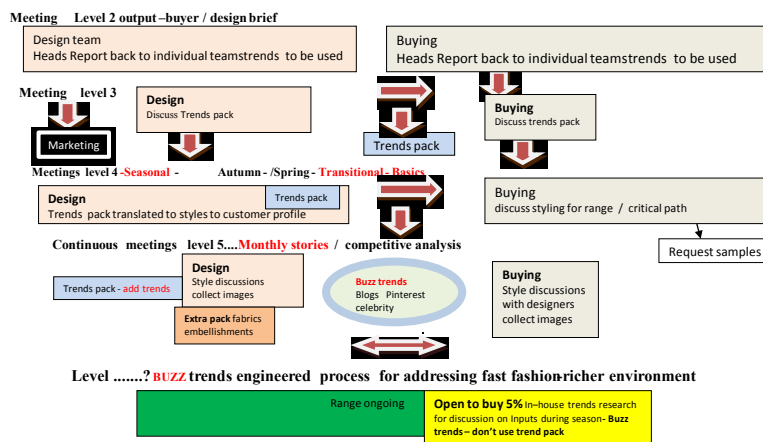
In the revised model a new development, the bought-in fashion process was added at level 1 illustrated in Figure 8.3. The buying team was responsible for planning the seasonal range plan and the 'bought-in' fashion range. The breakdown of the range plan was added to the model. The seasonal range represented 20% of the total range plan, with 5% devoted to fast fashion in the 'open to buy' process. The bought-in fashion part of the range represented 75%. The role of product developer was not incorporated into the revised model because not all fast fashion companies included this role as part of their team, the buyers fulfilled this function instead.



**Figure 8.3 The bought-in fashion range and the range breakdown**

Other levels in the model are unaffected

The planning stages and consultation meetings for producing the trends pack were added at levels 2 and 3 in the revised model, illustrated in Figure 8.5 below. The completion of the trends package had moved down a level, to level 3 in the model, to allow for the consultation meetings and development time required by the design team to produce the trends package. At level 3 the marketing team was added to the model. The current influences used for trend forecasting were renamed the 'buzz' trends. A trends pack for fabrics, embellishments and key garment shapes was added at level 5 in the model. The 'open to buy' process was moved up to level 5 to become part of the ongoing process for fast fashion, illustrated in Figure 8.4 and Figure 8.5 below.



**Figure 8.4 The design / buying consultation process to produce the trends pack**

Model starts at level 2 as level 1 is unaffected



**Figure 8.5 Current influences 'Buzz' trends**

Model represents level 5, other levels are unaffected

### 8.2.1 Confirmation of the final amendments to the revised fast fashion model with industry personnel

The fast fashion revised model set out in section 8.4 was shown again to the buyers and designers from Boohoo and ASOS. The questions were asked for confirmation of the accurate interpretation for the 'bought-in' fashion process in the model, and the representation of the alternative trend forecasting information in the 'open to buy' process.

Broadly most of the feedback supported the model. The questions can be viewed in appendix P. The generic changes to the model covered asked the respondents in question 1 to confirm if the 'bought-in' fashion process was accurately represented in the fast fashion model. The respondents confirmed that this was correct. Question 2 invited the respondents to confirm whether the 'open to buy' policy was accurately represented in terms of the alternative of trend forecasting information used. All of the respondents confirmed that this was correctly represented. Question 3 invited the respondents to comment on the terminology used in the model. The designers from Boohoo commented that 'seasonal' and 'transitional' ranges were terms referred to for describing their fashion ranges. The term 'fast fashion' they did not consciously use but could not offer an alternative term, all other terminology used was considered appropriate and correct.

The following questions had already been confirmed for accuracy in chapter 7, but were repeated again to ensure that these important issues were correctly represented in the model. Question 4 asked the respondents to confirm that the roles and communication channels were correct in the model. All the respondents confirmed that the roles and communication channels were correctly represented in the model. Question 5 asked to confirm the timeline was accurate. All the respondents confirmed that the timeline was accurate. Question 6 gave the respondents a final opportunity to say if there were any stages or levels not represented in the model. The respondents confirmed that all the stages were correctly represented, as previously stated and no additional stages were missing. Some of the differences in the comments mentioned were considered to be tailored and personal to individual companies, and therefore not be included in the proposed new models. These comments made by the individual retailers were considered to be important data, therefore not to be discarded and is captured in the models represented in appendix K and L. The respondents again agreed to sign a confirmation stating that the model was a realistic interpretation of the use of trend forecasting information in the product development process and the timescales represented were realistic for fast fashion.

### **8.2.3 The role and responsibilities of the designers and the buyers in the product range planning process**

The first literature review themes regarded the role and responsibilities of the designers and the buyers in the product range planning process discussed earlier by Brannon (2011). From the interviews conducted it was found at level 1 of the model, that the heads and directors of buying were responsible for controlling the bought-in part of the fashion range. Some companies had a separate buying team who planned the rest of the in-house range. At level 3 of the model the buyers interviewed were ambiguous about who chose the final trends for the trend pack because they had researched trends, as well as the designers. However, the designer's from Boohoo stated the designer's opinions were relied upon in the numerous meetings held for discussion on which trends from the trend forecasting books would be selected for their trend pack. The designer's also renamed the trends to suit their customer profile, prepared the garment shapes to fit in with these trends and produced books comprising of suitable fabrics for the trend pack.

### **8.2.4 The stages in the product development process where trend forecasting information was implemented**

The second literature review theme previously referred to in section 8.1.3 regarded the stages in the product development process where trend forecasting information was implemented. This was discussed earlier by McKelvey and Munslow (2008 and 2012) in section 8.1.3. In the revised model, the development of the trend pack was represented in level 1. For example, a designer from H&M stated they relied heavily on the trend forecasting service WGSN when building the new ranges at the beginning of the season. Garments bought by the buyers and designers from shopping trips in Los Angeles and Miami, were interpreted or copied for their garment range. Comparative shopping was undertaken in London, Topshop was given as a good example to be used for this type of research. The planning stages and liaison for developing the trend pack in levels 2 and 3 of the model. In level 4 the trend pack was used for translation into garment styling for the seasonal part of the range. At level 5 in the model several meetings took place to discuss style and the sampling progression for the seasonal range. At this level some new trends

were added to the original trend pack from online trend agencies for updating additions to the seasonal range. Simultaneously the fast fashion element of the range was discussed on an ongoing basis. The trend forecasting used here was not taken from the trend pack but from more current sources. For example, H&M, Boohoo, Primark and ASOS used Pinterest, catwalk shows, reports from trade shows on colour and styling, newspaper websites, blogs, fashion magazines, celebrity styling, street style, music, art and social media influences. The majority of the range was built using bought-in fashion by the fast fashion retailers Boohoo, ASOS and Primark. They relied on repeat orders sourced from branded fashion and accessories based on previous sales success. See Tables 8.3 and 8.4 for individual retailers seasonal and 'open to buy' trend forecasting resources and percentage for bought-in fashion.

### **8.2.5 Relationships and communication channels**

The third literature review theme regarded relationships and communication channels as earlier discussed by Tyler *et al.* (2006). From the interviews, it was found in some instances that the communication between the buyers and designers was described as poor. For example, Boohoo personnel stated, because not all of the information was passed down from the buying team; designers were left out of important discussions, leading to weak relationships. The relationship between buyer and supplier is crucial to the success of the retailer and should ideally be mutually supportive (Goworek 2007). However, there was no communication or involvement between the buying and design team for the bought-in fashion range. This had led to lack of continuity on how the final range would look from the design team's point of view. At level 5 of the model, the buying teams responsible for the in-house designed fashion range did not communicate effectively with the designers for the 'open to buy' part of the range, because any additions to the range, were included without consulting the designers. The designers lost time and effort producing garment designs, which sometimes turned out to be similar to these additions because they had been introduced unknowingly, without notice or communication from the buyers, therefore these styles would not be required.

Weaknesses in the product development process was highlighted by the personnel from Primark, such as the supplier countries being based in Bangladesh, India and China had



problems with shortages of raw materials and the effects of diverse climates such as heat waves, flooding and power shortages which affected lead times. A designer from ASOS reported they had technical problems in garment production. Collaboration with suppliers affected decision making for product development for example, ASOS sometimes made a 'trend-led' product such as the laser cut swimsuit, it had to be in the range as a key piece because it was a new trend, but as a consequence they had problems with production on a quality issue. The problem from working with certain suppliers was that they could not manage a particular technique (or that they did not want to) or that they could not handle the quantities. ASOS had product developers centred in the supplier markets they had a good knowledge of the customer and the product and were able to communicate directly with the manufactures during the production process. This had contributed immensely towards a positive outcome for initial sampling and for overcoming manufacturing problems that in the past would have led to a product being dropped. They also now monitored their high returns more vigilantly for fit and quality issues to improve these problems.

A designer from H&M reported that they had problems with quality, they needed to improve their communication and timescales in their supplier countries for fast fashion. To address these problems in recent years, due to both company expansion and the need to react quicker, they had established product development centres in a number of their supplier markets which has ensured much more effective communication and a close working relationship with the product, and this would ultimately reduce these problems and bring down the product development times. See Tables 8.3 and 8.4 for individual problems for 'open to buy'.

Weaknesses in the design process were found at ASOS a designer stated they should do more in-depth trend research at the start of range planning and throughout the range planning process. A designer from ASOS pointed out the errors of trend forecasting when certain garments did not sell from using trend forecasting information. Therefore they traced and monitored garment returns every week to determine why they had or had not sold. They analysed and reviewed the top eight returned styles for the last reporting month to establish if trend, colour, style or fit was the problem. They also held customer fit days

where each customer was measured upon arrival. A designer from ASOS stated it was essential to understand the market needs and what they could improve upon.

A designer from H&M also noted that some of their trend choices had been unsuccessful. They used online trends, but there were occasions where they found some trends had been over exposed and therefore were not successful with their customers. Tie and dye trousers is a good example. The same could be said the other way round especially with smaller product categories, such as denim, there could often be product specific trends or technology developments that were missing from the forecasting services. The larger trend forecasting services' predicted trends that were very broad based with many off shoots from the main theme of the trend, which made the interpretation of the trends very confusing. Specific garment types lacked detail. The smaller trend forecasting services specialising in specific product categories, but these were sometimes lacking in the broader trend information. The overall collection themes were often planned, while the latest trends were picked up at short notice. The garment range was mainly planned seasonally with only a small amount devoted to fast fashion. See Tables 8.3 and 8.4 for individual retailers' trend prediction problems for seasonal fashion.

Primark looked at sales reactions and customer feedback to determine why styles had or had not sold. Trend forecasting information such as street blogs, copying from the high street were used for the fast fashion element because of quick response required. This appeared to be based on last minute opinion and speculation. A designer from H&M pointed out that their business was dependant on the team knowing their consumer and not fashion forecasting alone. This view was reiterated in by Rousso (2012), who stated a successful fashion business depended on knowing and understanding the consumer, fashion companies being able to deliver the right product into the market place at the right time, in the right quantities at the right price for the right consumer.

### **8.2.6 Product lead times and product buying cycles**

The fourth literature review theme was concerned with product lead times and product buying cycles. Fast fashion was a business strategy, which aimed to reduce the processes involved in the buying cycle and lead times for getting new fashion products into stores, in

order to satisfy consumer demand at its peak (Barnes and Lea-Greenwood 2006). The criteria implemented for quick response was minimal because the 'open to buy' policy used for fast fashion was unplanned and relied on repeated orders and the last minute introduction of additional styles due to the time limitations involved. Goworek (2007) advocated the whole buying cycle was much shorter in order to respond to trends more rapidly and there is no time to get it wrong! Only a small percentage of the total range was devoted to fast fashion. This element was made up of repeated fashion lines in new colours or simple changes made to original garment designs, or an interpretation of any styles copied from the high street. ASOS for instant fashion copied celebrity styling, bought in small quantities in plenty of styles and mixed up the range so that it looked different for example, Kylie Minogue wearing hot pants. Blogs would be checked to see if any of their celebrity copied styles had been worn. See Table 8.4 for individual retailers' policy for updating garment range.

Bought-in fashion made up the bulk of the range at 75%. Garments consisted of branded lines, such as denim ranges by Diesel and G-Star sourced by ASOS or ready-made products such as accessories, sourced by Boohoo from China or India. Therefore, other people were taking the stock risk. This format was being explored for ready-made garments which retailers were calling fast fashion. This raised the question as to what was the availability of these garments and where the stock was held. This stock mode was a new development in the process model. Who was doing the designing? Someone else's ideas were being used for fast fashion. It was determined from the interviews conducted that garment stock was held in a central distribution centre in the UK to suit the retailer. ASOS had suppliers worldwide, drops of garments were made every few weeks and shipped to approximately two hundred countries from a distribution centre in the UK. If certain styles did not sell well, such as the branded goods bought by ASOS, this stock was returned to the original supplier or sold off by ASOS at discounted prices. To deal with the customer returns they held weekly meetings to problem solve. Boohoo sold their excess stock off at discounted prices. This was not true fast fashion because ready-made garments were bought in, these were not fresh ideas, they were someone else's ideas and buyers were calling it fast fashion. Decisions were made on risk for bought-in fashion, taken many months before requirement.

### **8.2.7 Timescales for new trends**

The fifth literature theme considered timescales for new trends discussed earlier by Eundeok *et al.* (2011) and Easey (2009). Hines and Bruce (2007) stated that traditionally change had been by seasons but the fast fashion phenomenon had made biannual seasons an irrelevance for some brands as new fashion stories or mini collections were refreshed monthly. The interviews highlighted some fast fashion retailers, such as Primark and H&M still followed the seasonal range planning process for 80 to 90% of the in-house designed part of the range, whereas others such as ASOS and Boohoo only designed 20% of their range seasonally. The majority of fast fashion sold by ASOS and Boohoo was branded 'bought in' fashion up to 70% and 75% respectively. The remaining 5% by Boohoo, 10% by ASOS and H&M and 20% by Primark was the only designed in-house fast fashion. See Table 8.4 for the retailers percentage breakdown of the fashion range.

In the attempt to meet the shortened timescales required for fast fashion, the buyers and designers reverted to copied styles from the high street and fashion images from magazines for instant styling ideas, which could be sent out to suppliers to interpret directly. Simultaneously, 'best sellers' were repeated continuously, in the effort to keep the range refreshed and maintain consumer interest. H&M coped with quick response by producing high fashion garments in small quantities to meet demand. The 'bought in' fashion range was actually supplementing fast fashion because it was ordered far in advance, therefore having the benefit of a longer timescale, but still being described by the buyers and designers as fast fashion. Therefore, the original brand suppliers were facing the manufacturing and product lead times issues and not the fast fashion retailers.

These issues raised questions as to whether or not industry personnel were fully aware of the unorganised system they used. The buying procedures were laid out but the interpretation of the creative aspect was intuitive and open to failure as illustrated in the problems raised from the primary research interviews in this chapter. The fast fashion retailers acknowledged certain aspects of their current system for delivering fast fashion required improvement.











Retailers	Ready-made fashion	In-house designed seasonal fashion	'Open to buy' Close to season fashion	Seasonal fashion	Fast fashion
	N/A	80%	20%	X	
		PLM			
		Best sellers Repeats in new colours	Repeats of garment types New graphic or fabric print		
		Trend package	Catwalk, celebrity styling, celebrity collaboration		
		Missed trends Lacked confidence in trend selection	Wrong buying volume Lack of specialist machinery or factories		
	N/A	80% +/-	20% +/-	X	
		PLM			
		Best sellers Repeats	Small ranges produced in trends or stories		
		Trends package	Catwalk, magazines for celebrity influence		
		Miss trends / colours	Unorganised set up		
	N/A	90%	10%	X	
		Merchandisers			
		Best sellers Repeats in new colours	Repeats, change placement print in garment types		
		Trends package	Copy celebrity styling, couturiers, high street in garment types		
		Missed trends and colours	Improve response time and increase supply base		
	Accessories	80%	20%	X	
		Merchandisers			
		Best sellers	Repeats in new colours		
		Trends package	Celebrity and designer collaborations, blogs		
		Poor trend selection e.g. military trend	Unorganised set up wrong buying volume to meet timescales UK manufacturing		
	Wholesale branded goods sell to retailers	90%	10%	X	
		PLM			
		Best sellers Repeats in new colours	Repeats in new colours or with slight changes in garment types		
		Trends package	Copy bought samples from the high street		
		Missed trends			

Table 8.3 Fashion retailers choice of range selection

Retailers	Ready-made fashion	In-house designed seasonal fashion	'Open to buy' Close to season fashion	Seasonal fashion	Fast fashion
	N/A	90%	10%	<b>X</b>	
		PLM			
		Best sellers Fabric innovation	Repeats in new colours Simple detail changes, fresh logos		
		Trends package			
		Poor communication	Missed trends		
	Supply branded ranges for individual clients JD, ASOS Debenhams	90%	10%	<b>X</b>	
		PLM			
		Best sellers Fabric innovation Garment detail	Repeats in new colours, New logos / simple detail changes to garments		
		Trends package	Blogs, magazines		
		Missed trends			
<b>PRIMARK</b>	Accessories	80%	20%		<b>X</b>
		Merchandisers			
		Best sellers	Monthly stories Copying bought samples		
		Trends package	Catwalk, blogs, celebrity, magazines		
		Get trends wrong	Lead times affected by:- Shortages - raw materials, heat waves - India, flooding-Bangladesh power shortages - China		
	N/A	90% Seasonal range	10%		<b>X</b>
		Planners			
		Best sellers, Copy bought samples - trips	High fashion - small quantities to meet demand		
		Trends package Customer feedback	Blogs, catwalk, street, fashion magazines, celebrity, focus groups		
		Unsuccessful trends Supplier technical problems	Globally based product development centres to improve quality		
	70% Unsold products returned to brand or discounted Best sellers	20%	10%		<b>X</b>
		Merchandisers			
		Best sellers, Repeats	Copying, street style		
		Trends package	Work in garment types Celebrity, catwalk, blogs		
		More in-depth trend research required	Monitor returns, supplier technical problems		
	75% No designer collaboration Interest Blogs	20%	5%		<b>X</b>
		Buyers			
		Best sellers	Copying fashion images		
		Trends package	Fabric / trim package Celebrity, catwalk, blogs		
		Poor communication	Poor communication with designers		

**Table 8.4 Fashion retailers choice of range**

### 8.3 Revised seasonal model

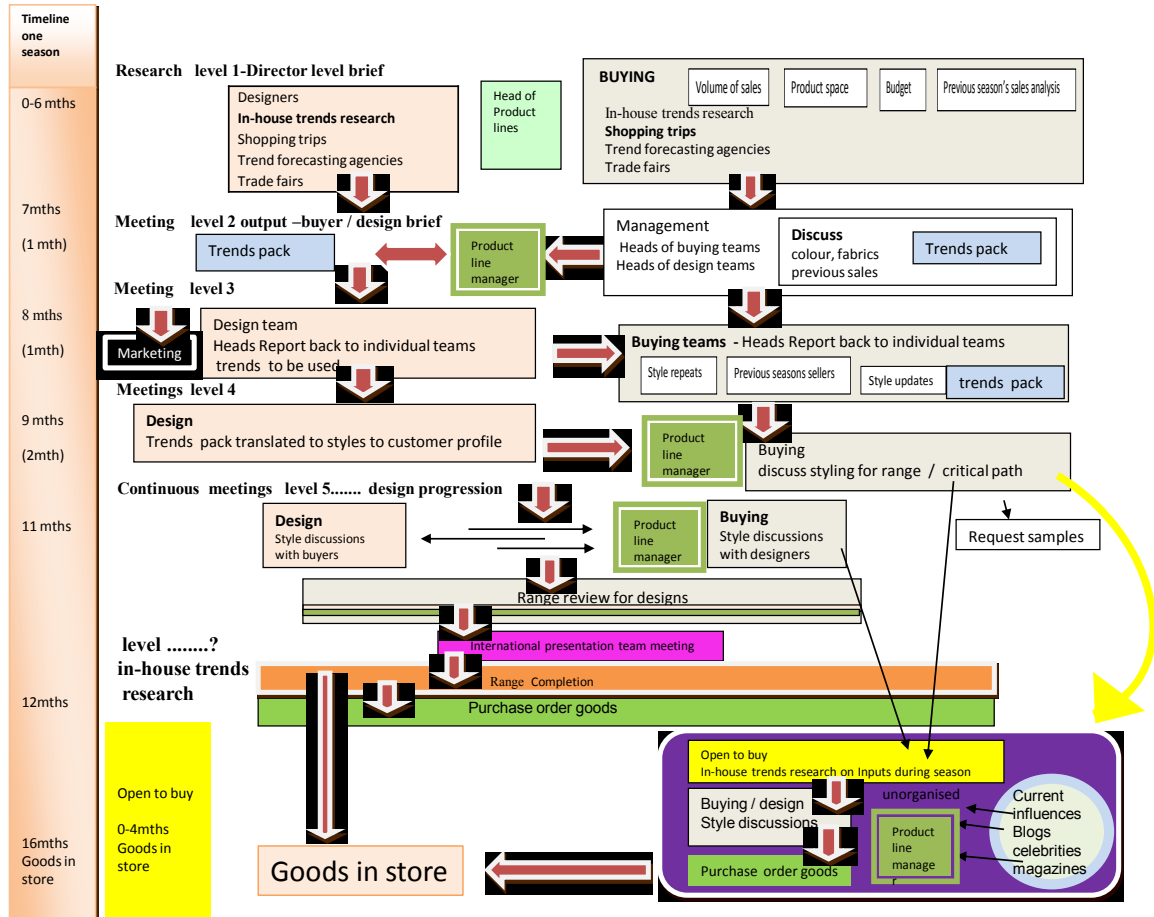


Figure 8.6 Seasonal model

## 8.4 Revised fast fashion model

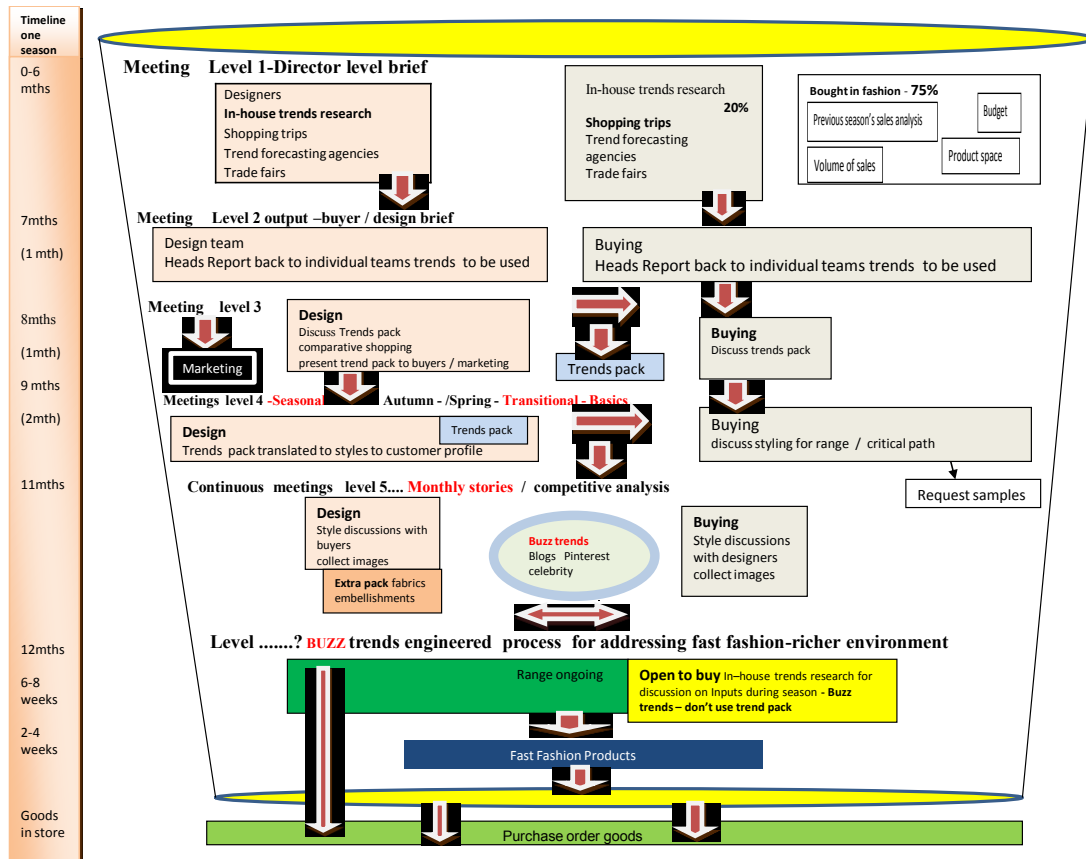


Figure 8.7 Fast fashion model



## 8.5 Summary

The role and responsibilities of the designers and the buyers were clearly set out in both the seasonal and fast fashion models of the range planning process. The product line manager was introduced into the revised model, whose role it was to liaise between the buyers and the designers throughout the product development process. This role was not represented in all buying teams interviewed. It all depended on the company set up. The consultation meetings and planning stages that took place within the product development process illustrated that the buyers carried out separate roles to the designers and did not collaborate on the range planning with them until level 4 in the models. Sales data and previous best sales took priority from the buyer's viewpoint, suggesting trend forecasting was less important. The 'open to buy' policy was added in the model at the end of the seasonal process, showing the planning process to a shortened time frame. It was highlighted that most of the range was done seasonally, only a small percentage was devoted to fast fashion for the seasonal retailers. The range reviews were added to the seasonal model. The time line shown in the model for the range plan process represents one season.

In the fast fashion model the bought-in fashion range was added at level 1 in the model. This represented 75% of the total range plan, a new development for the fast fashion model because ready-made fashion had not been considered as a fast fashion element before. The remaining part of the range was shown to be split into 20% seasonal fashion, designed in-house and 5% unplanned fast fashion. The stage in the product development process where trend forecasting information was implemented was incorporated into the model. It was determined that the trend pack was used at the beginning of the range planning process but for the 'open to buy' process alternative trend forecasting was used taken from blogs, celebrity influences and fashion magazines because the trend pack had become outdated and online trends because they were too broad or narrow in explanation. The fast fashion model included the planning stages for the trend pack added at levels 2 and 3. Here the designer's opinions were heavily relied upon for trend input for the trend pack. The fast fashion retailers concentrated on seasonal fashion inputs with a small percentage of fast fashion and ready-made fashion bought-in to make up the bulk of what

they described as fast fashion. All retailers noted it was important to know your customer and not totally rely on trend forecasting.

Lack of communication and continuity was reported after level 5 in both models according to the designers. 'Open to buy' was unorganised because the buyers or product developers made additions to the range without consulting the designers. In the fast fashion element of the range the separation of the design and buying roles had led to lack of communication and continuity of how the total range would look like from the designer's point of view. The time line shown in the model for the range plan process represents one season.

The set calendar of traditional fashion events for trend and style predictions affected the unplanned 'open to buy' part of the range because retailers found it difficult to keep up with the pace of providing new styles for fast fashion undertaken at the end of the range planning process. Therefore, the criteria introduced to deal with this problem was to keep new garments styles to a simple formula of repetition of styles in new colours, simple style or detail changes or copied garments from celebrities or competition. The criteria for production were to keep it closer to the UK in the supplier markets, for competitive delivery prices and quicker response. The criteria for quick response were minimal and were similar to that of the seasonal model. The difference being that bought-in or branded fashion was being referred to as fast fashion. This formula explored ready-made fashion. The origins of this fashion being from countries like China or India. Stock was held at distribution centres in the UK and shipped to the required destinations. If styles were unsuccessful, they would be returned to the original suppliers or sold off by the retailers at discount prices. This led to the possibility of high returns. This was not true fast fashion because they were not fresh ideas, someone else had designed these products and the buyers were calling it fast fashion. Decisions were made on risk made many months before requirement for bought-in fashion.

The role and responsibilities of the designers and the buyers in the range planning process were highlighted from the fashion industries viewpoint in terms of whom they reported to in the models. The consultation meetings and planning stages that took place within this process were illustrated in the models. The designers reported to the buyers. The buyers interviewed had stated they had more say in decision making about what product types

were to be included for the range plan, over the designers. The buyer's decisions were prioritised around a set budget and the designers around the trends pack. The relationships and communication channels in the product development process observed by the designers was poor. Communication from the buyers was not consistent on information passed down to the designers. The designers often found gaps in the information passed down about the range. The designers were not kept up to date with items added to the range after meetings conducted after level 4 onwards in both seasonal and fast fashion. The buyers saw themselves as communicating with the designers in conversations held during the interviews but in reality, clearly this was not how the designers saw it from interviews conducted with them. Most of the range plan was seasonal; 'open to buy' was the unplanned part of the range left open for late additions to the range. The buyers indicated this was an organised process but improvements should be made to accommodate the fast fashion element in terms of collaboration with the supplier markets. They needed stronger relationships with suppliers to improve production problems, supply and delivery. Certain fast fashion retailer's referred to bought-in fashion, branded fashion, copied or repeated garments as fast fashion.

The researcher ensured that the role and responsibilities of the designers and the buyers in the range planning process were clearly defined in the models. The roles in the model were clear in terms of who reported to whom, but in reality communication and collaboration needed improving upon for range style decisions to reduce time wasting for the designers. The models illustrated the 'open to buy' policy in terms of how this process was carried out. The consultation meetings and planning stages in reality however, needed to be more integrated with buying and design for decision-making for style inputs in this process. The stages in the product development process where trend forecasting information was implemented was illustrated in the various levels of the models. However, from the case study discussions, one buyer commented that trend forecasting needed to be more thoroughly researched from the beginning of the process because the choice of trends was overwhelming for some fashion categories, for example denim. The solution was for buyers and designers to know their customer as a priority over trend forecasting. The designers commented that online trends were too broad or too narrow and missed technical advances for the fast fashion element. Tracking trends more efficiently, combined with using sales data would better equip seasonal and fast fashion for trend prediction. Too

much copying from the high street had led to loss of individuality in design for the consumer. The retailers needed to know their consumer better, in order to move away from repetitive orders. These orders were based on a rapid response to fast fashion, with little thought because it was carried out at the end of the product development process.

Relationships and communication channels were shown in the models but in reality, the emphasis was on good communication, which could not be relied upon because there was lack of flexible thinking and planning. The mechanism for coping with fast fashion originated from 'bought in' fashion, branded fashion or copying to cover the large quantities to meet the fast pace required for fast fashion retailers. The origins of these suppliers taking the stock risks were based in countries such as China and India, where decisions on products chosen for the range had been taken months before requirement. The seasonal retailers coped with the fast fashion element by copying fashion trends and repeated orders. There were only a few retailers offering true fast fashion.

There had been an encouraging and substantial amount of positive feedback for the conceptual models in terms of the timeline presented and the levels set out representing where trend forecasting information was used in the product development process. This feedback from the respondents offered some constructive advice for amending the models. These recommendations were implemented to form the revised models for seasonal and fast fashion. This information was used for stage 6 of SSM.

The data collected from the interviews conducted provided a realistic view point and highlighted the areas for further development which previous publications did not present. The following points indicate the potential route to establish base line knowledge to understanding the behaviour of fashion retailers' use of trend forecasting in the form of a conceptual model.

- the stages in the product development process where trend forecasting information was implemented
- the relationships and communication channels between the buyers and designers as to how trend forecasting information was used when range planning
- the timescales involved in the 'open to buy' process and the product lead times for fast fashion in the supply chain process

The data reached saturation point as the information collected became repetitive in the viewpoints. None of which would have been uncovered from current literature alone. The models discussed by authors before had not represented where exactly trend forecasting information was implemented by the designers and the buyers during range planning process in the model. The fact that alternative trend forecasting was used for the 'open to buy' process had not been mentioned or the fact that bought-in ready-made fashion was referred to as fast fashion. The revised models had been confirmed for accuracy and validated by industry personnel. There were significant findings from the discussions that had taken place about the consultation meetings and planning stages within the product development process. This had helped to uncover the realities, for example:-

- the product line manager role was part of the team in some of the companies interviewed, they liaised with the designers and reported back to the buyers, therefore the buyers and designers carried out their roles independently at the start of the range development process
- the buyers and product line managers controlled budgets and the incorporation of new product lines and the designers developed trends for the trend pack for seasonal fashion
- the trend pack was only used for seasonal fashion and not used for the 'open to buy' process, repeated fashion styles, the seasons best sellers and copied fashion was used to facilitate this process
- fast fashion was actually bought-in fashion, which represented 75% of the fast fashion range and was controlled by a separate buying team
- this formula explored ready-made fashion which was not true fast fashion because decisions were made on risk, many months before requirement for bought in fashion
- fast fashion retailers still used seasonal fashion for 20% of the range plan

The data collected from the interviews provided reinforcement and new knowledge represented in the content recorded of the revised models in terms of the planning stages and the timeline. These findings are new in this research area and are not discussed in current published literature. For example:-

- the timeline was represented in the models for seasonal fashion, the 'open to buy' policy and fast fashion

- the models clearly defined both the designers and buyers roles and responsibilities and to whom they reported in the consultation meetings for range planning
- the models recorded exactly where the trend pack was used by the designers and the buyers in the product development process
- the stages in the product development process were recorded down in relation to one season, for the seasonal and fast fashion models
- the planning procedure for the ‘open to buy’ process was recorded in both the seasonal and fast fashion models

Traditional models and theories fail to provide adequate insight for coping with this new and rapidly changing business environment (Cravens *et al.* 2009:31-49). There was no mention in the models of returning to trend forecasting information at any stage. It appeared that the entire decision making was done at the onset of the season and the buying input and historic data were key factors in the decision making process of the range.

## **Chapter 9: Conclusions and Recommendations**

### **9.1.0 Introduction**

The focus of this research is to accomplish the identified aims by designing trend forecasting models for seasonal and fast fashion context. Trend forecasting has been widely discussed by the researcher in fashion design and marketing. There are many trend forecasting resources available for designers and buyers when designing the garment ranges. The trend forecaster's role is to identify style trends by investigating the retrospective data from the previous season, enabling them to use their intuition to predict future trends. Retail buyers build their new range around repeat styling, changes to existing product lines and the incorporation of new products.

Fast fashion raises an issue for the fashion industry in terms of product lead time for manufacturers, product buying cycles for retailers and the role of trend prediction for forecasting agencies. The impact of fast fashion on the fashion trend forecasting agencies meant that they intend to react to this phenomenon. Other issues raised concerned how often trend forecasting information was referred to by the designers and buyers when planning the garment range, the communication channels and consultation meetings that took place in the range planning process and how the timescales have been affected by fast fashion. The aim of this research was to address these issues in the context of the UK clothing sector.

Through critical appraisal of literature the trend forecasting process and how their services were implemented in the fashion industry were analysed. The primary research conducted with the trend forecasting agencies explored how they developed trends and the process they used to produce the trend package. Furthermore the buying and design personnel in the fashion industry were interviewed to determine how trend forecasting was incorporated into the product development process.

SSM was used to illustrate the problems facing the trend forecasting agencies using rich pictures. Models were constructed linking tools with timescales for trend forecasting in product development for seasonal and fast fashion contexts. The models were tested and

validated in the fashion industry. The interviewing with the industry personnel highlighted that it linked the process with the practice.

SSM provided the framework to the primary research. Stages 1 and 2 were used to highlight the problems for the trend forecasting agencies to meet aim 1. These problems were illustrated in rich pictures. In stage 3, the process focussed on how trend forecasting is picked up and used in the fashion industry. The themes drawn from the literature and initial interviews with the retailers was used to construct the conceptual models for stage 4 to meet aim 2. In stage 5, the models were shown to the buyers and designers in the industry. The feedback collected from the planning stages, the trend package and the timeline for seasonal fashion, fast fashion and 'open to buy' process was used to revise the models for stage 6. The revised models were validated by the buyers and designers in the industry to meet aim 3. These new models represented stage 7, the final stage of SSM to meet aim 4, which quantified the timeline for seasonal fashion, fast fashion and 'open to buy'.

Information sourced through the primary research created new knowledge in the interpretation presented in the content of the models. Trend forecasting was successfully located within the seasonal and fast fashion supply of garments. The commonality and diversity of the PLM role was identified. The 'open to buy' process was identified as a strategy for coping with close to season fashion. The timeline, 'open to buy', seasonal and fast fashion was represented. In the fast fashion model bought-in fashion represented fast fashion.

This research established the fact that the role of the designer was not fully represented in any models in the product development process. Product development and range planning were discussed only from the buyer's viewpoint. Trend forecasting was discussed within the field of the trend forecasting agencies about their skills and sources of information used for researching trends and the fact the fashion industry used trends as a resource was referred to, but no explanation of the detailed process used to develop the trend pack within the trend forecasting agency. There was no relation, as to how the trend forecast was used in the various sector levels in the fashion industry. The range planning stages did not include the designer's role and the design process was not recorded. The team effort was discussed, but there was no detail of how decisions were made. In previous literature



seasonal fashion and the set fashion calendar was briefly mentioned and the reduced timescales required meeting fast fashion generally, but this was not represented as a timescale in any previous models. Other research discussed model building for the colour forecasting process, but current models generally failed to recognise changing fast fashion. This research focussed on the interaction of key personnel, specifically the trend forecaster, the product line manager, the designer and the buyer. In the fast fashion model the bought-in range and the 'open to buy' process in the seasonal model.

### **9.1.1 Findings from critical appraisal of the literature**

This was accomplished by critically appraising literature pertaining to trend forecasting and analysing the role of trend forecasting within the product development process discussed in chapter 2 to meet **aim 1**. The trend forecasting agencies act as consultants to the retail sector and sell their trend packages to the fashion industry therefore, it was necessary for the researcher to understand how the forecasters developed trends and how the process worked in a trend forecasting agency. Findings from secondary sources provided the background information as to how the trend forecasting information is bought by the manufacturers and used by the industry. The literature discussed the role and skills of the trend forecaster but lacked information about how the trend forecasters develop the trends and the sequence of events that take place when producing the trend package within the trend forecasting agency. Important areas were not discussed by authors about the trend forecasting agencies in terms of the process they used and issues affecting them such as the effect of quick response and fast fashion on trend forecasting. There was no reference to the timeline differences in relation to fast fashion conflicting with trend forecasting or the traditional calendar of set fashion events. Therefore, this information had to be achieved through other sources.

The research also explored on how the trends package was picked up in the fashion industry and used in product development. As highlighted earlier that there was a lack of explanation and understanding of this subject area, the information found was limited in quantity and quality of detail about the application of trend forecasting in product development. The outcome was there was no evidence of any in depth analysis of the current trend forecasting information used when modelling the product development process. There was a lack of investigation of its effectiveness in the fashion industry and

no suggestions for improvement. Authors described the product development process from the buyer's viewpoint and any discussion points were based around the buying procedures in the design and buying environment.

Secondary resources highlighted that designer's perception were not part of the product development process where trends were forecasted. The planning stage in the model where the trend pack was used is not highlighted or that a different kind of trend information is used for the 'open to buy' process. The 'open to buy' procedures were not recorded down in any current models or the timeline referred to for seasonal fashion or fast fashion. Although the literature about trend forecasting is diverse, the depth and detail is not presented by the authors to provide a framework or foundation for developing any new models. Therefore, new models had to be constructed through a combination of theory and primary research data. Models by current authors do not address the fast paced fashion.

The outcomes of investigation into these discussed areas provided the precise detail of information which currently there is no recording of when developing the garment range in the product development process. It was not clear how decisions were determined when building the garment range, or who takes the lead on making these decisions. Therefore, it was difficult to ascertain at what stages in the model industry professionals incorporated trend forecasting information into the process. This was not discussed in great detail by authors currently and remained elusive. Hence, the necessity for this research, which contributes to the need for more academic study in this area; its importance must not be overlooked especially in terms of the information providing understanding and clarity about the role of trend forecasting in the product development process. This was achieved through interviews with professional personnel in the fashion industry.

### **9.1.2 Fashion industry personnel perception on trend forecasting**

The rationale of the interviews were to meet **aim 2**, by probing the trend forecasters working in the trend forecasting agencies and the retail buyers and designers working in the fashion industry. In order to identify the positioning of trend forecasting within the product development process, the data from the interviews were vital in laying the foundation as well as determining the knowledge base of the trend forecasting discipline.

The initial interviews enabled the researcher to comprehend the methods employed by the trend forecasting agencies when developing the trend packages for their clients in the fashion industry. This highlighted how the trend forecasting process was carried out in a trend forecasting agency, what were the forecaster's role in identifying the fashion trends and how the information were applied in building the trends and the timing of a trend for seasonal fashion and fast fashion.

The outcomes from these interviews also identified the problems the trend forecasting agencies were facing, such as the trend forecaster working on intuitive ability involved a risk factor of missing emerging trends or a mis-match of the prediction of trends with reality. The introduction of fast fashion was an added problem for the forecasting agencies, because they were constantly attempting to keep up with the demand of frequent new trends required for fast fashion. The forecasting agencies were used to working for a set fashion calendar (two seasons per year). Therefore, the trend forecasters had significant time to prepare trends in advance of the season. The online trend agencies were only able to provide a limited amount of new trends at this continued fast pace environment. The conventional timing of pre-set seasonal trade shows for fabric, colour and styling was not conducive with unconventional fast fashion. The timing of some of these seasonal trade shows was mis-matched, which had led to a block in flexibility for the trend forecasting agencies. There was little time to research potential fashion trends, thus creating problems for the fashion industry which resulted in the designers and buyers using future trends for existing collections. Previous research had not highlighted these issues before.

During the second phase of this research, interviews were conducted with retail buying and design to identify the buyers and designers roles and their responsibilities, and how and where trend forecasting information was used in their critical path for both seasonal fashion and fast fashion. The explanation of the 'open to buy' policy and fast fashion procedures was required and the timescales involved with these processes.

The outcomes of these interviews highlighted the problems in the product development process for the seasonal retailers. It was found the buying department had no formal measure on the success of the trend forecasting information used for seasonal fashion. Trend forecasting data became secondary importance to sales data. The buyers

occasionally missed trends during the season that turned out to be successful. The decisions made about the content of the range plan were led by the buyers over the designers. Any unplanned meetings that were called during the season for suggested additional garments to the range as a last minute reaction to close to season fashion, new emerging trends, celebrity fashion influences or copying from the high street competition which involved little planning time. The drawback of quick response was the timing of a trend, finding a suitable supply base to meet production and delivery time, and relying on good communication and collaboration. Respondents highlighted that the last minute reaction was problematic for the majority of the retailers, and only a small amount of garments could be produced in this format.

The outcomes from the interviews with the buyers from the fast fashion retailers highlighted that the fast fashion phenomenon had a direct effect on the garment manufacturers, the retail buyers and the retailers buying cycles. Traditional production times were challenged, because they were finding it difficult to keep up with the pace of fast fashion. These problems identified as weaknesses in the product development model, therefore an improved model or series of models needed developing to address these shortcomings. It is evident from this study that current models did not represent the stages where trend forecasting was implemented. It appeared that the entire decision making was carried out at the onset of the season and the buying input and historic data were key factors in the decision making process of the range (see Chapter 6). There was no recording in previous models of trend forecasting being implemented in later stages in the process. Traditional models and theories fail to provide adequate insight to handle the new and rapidly changing business environment.

Authors discussed the critical path from the buyer's viewpoint, the designers were not included. There was no reference to exactly when or how trend forecasting was referred to by the designers when planning the garment ranges. There was no connection or reference made to how the wider fashion industry used trend information during the product development process. The buying process had always taken precedence over the design process and been at the forefront of discussion. This is why models recording the design process have never been discussed and researched before. To accomplish this aim the

primary research information was used to begin building the conceptual models for seasonal fashion and fast fashion contexts.

### **9.1.3 Trend forecasting models for new product development**

The information synthesised from critical appraisal of the literature were used to build conceptual models for seasonal and fast fashion to achieve **aim 3**. SSM technique was used to establish the theoretical framework for these models (discussed in Chapter 7). Stages 1 and 2 of SSM were used to investigate and interpret the problems for the trend forecasting agencies in rich pictures. In stage 3, the process focussed on how trend forecasting is used by the fashion industry in product development. The concept of seasonal fashion and fast fashion and its role in changing the model of fashion trend forecasting was critically analysed from information gathered from the retailers. The models were built by experimenting with the data to conceptualise a structure from what would be an unstructured situation. Two statements were made in accordance with SSM describing the problem situation and what it aims to achieve. These root definitions or viewpoints were taken and applied to the use of trend forecasting in the product development process.

Models were developed showing the minimum set of activities to achieve the stated transformation. (The transformation is the change that takes place within the system). The input is the trend forecast data; the output is the garment range. The transformation is the process of using the trend forecast information in a product range. The transformation analysis is expressed by using verbs which make up the components of the system. The verbs are interpreted as functions of the product development process in a logical sequence and presented in a flow chart. This data was used to establish theoretical models for stage 4. These conceptual models were shown to fashion industry professionals and tested for their realistic interpretation seasonal fashion and fast fashion contexts.

The outcomes of the interviews highlighted the weaknesses in the current seasonal process such as the buying and design roles being carried out separately at the beginning of the range planning process. The buyers and designers did not work together until much later in the model than anticipated (from level 4 in the revised model rather than level 2 in the

conceptual model) resulting in a lack of communication and integrated decision making between them during the range planning process. Additional garments were incorporated into the ranges by the buyers without consulting the designers (from level 5 onwards) for the seasonal range and the 'open to buy' process again resulting in inconsistent communication and co-ordination of the range plan. The placing of repeated orders from the season's best sellers took priority over original ideas from trend forecasting. Unplanned inputs based on copying from the high street competition were also relied upon for this process because it was difficult to deal with the fast pace of designing completely new products for close to season fashion. In the seasonal model the 'open to buy' process was referred to at the end of the range planning season as a separate strategy conducted to address close to season fashion. Therefore, it only represented a small proportion in the planning of the range. This had proved to be difficult as decisions were taken during this process were baseless and unorganised. Even in the late stages of the range reviews when garment designs were finalised, additional garment designs would be incorporated into the product range.

Interesting findings noted from seasonal retailers was that they identified exactly which level in the model the trend forecast package was incorporated. Where during the season the 'open to buy' policy was carried out and how this was facilitated was explained. The inclusion of the product line manager's role (PLM) in the relevant levels of the model and the range reviews and the international team meeting should be included in the model.

The interviews highlighted the weaknesses in the current fast fashion process such as the designers had no input into the bought-in fashion range resulting in lack of continuity of how the total range would appear. Additional garments were incorporated into the ranges by the buyers without consulting the designers. Fast fashion and the 'open to buy' process was represented as a 'planned-in' continual process in the conceptual model. The trend forecasting information used during the 'open to buy' process by the fast fashion retailers was based on current influences referred to as 'buzz' trends. These trends had proved difficult to accurately predict by the designers and buyers because of the fast pace required for these new trends to produce completely new products in a reduced timescale for fast fashion. The findings from the interviews with the fast fashion retailers highlighted that bought-in fashion represented up to 75% of the total range plan, 20% was for the seasonal

range and 5% was for 'open to buy'. In the fast fashion model it was found that the mechanism for dealing with fast fashion originated from bought-in fashion. The researcher recognised this as a new development to be added to the model because ready-made fashion had not been considered as a fast fashion element before. The consultation meetings for developing the trend pack should be added to the model. The buyers and designers referred to alternative trend forecasting for the 'open to buy' process such as blogs, celebrity influenced styling and copied fashion images from magazines or their high street competition and did not refer to the trend pack. The marketing stage required to be incorporated where the designers presented the trend pack to the marketers and the extra trend books for fabrics and embellishments have to be incorporated into the model. The difference between seasonal fashion and fast fashion trend forecasting information was identified.

The data collected at this stage was used to make revisions in stage 5 leading to the revised models for stage 6. The revised models were shown again to the same industry personnel for confirmation of the recommendations made from their feedback. The important points for both the seasonal and fast fashion models were established for their realistic interpretation of the consultation meetings and planning stages that took place during the product development process within the set timeline. The differences identified in the planning stages were discussed and implemented in the revised models for seasonal and fast fashion in chapter 8.

The communication, responsibility and relationship channels between the buyers and designers were located within the model. The 'open to buy' and fast fashion process were represented and the stages where the trend package was incorporated into the model. Interviewees stressed that the fashion industry was reliant on long lead times and varying timescales for close to season fashion. These timescales have been established in the fast fashion time line within the design and buying sector of the industry and used to contribute to the product development models. These timescales had not been prioritised in models from previous research. The aim of this research was to design and evaluate a taxonomy of models relating theory and practice of new product development and trend forecasting. This has been achieved in the revised models.

#### **9.1.4 The contribution to the evaluation of trend forecasting in contemporary design, marketing and retailing environment**

To meet **aim 4** the data validated by the fashion industry professionals provided new knowledge represented in the context of the proposed new models. The models clearly defined the designers, buyers and product line manager's roles and responsibilities and to whom they reported in the consultation meetings for range planning. The models established exactly where the trend pack was used by the designers and the buyers in the product development process. The fact that the trend forecasting pack was only used for seasonal fashion and alternative trend forecasting was used in the 'open to buy' process was identified. The planning procedure for the 'open to buy' process was recorded in both the seasonal and fast fashion models. The stages in the product development process were recorded in relation to one season for the seasonal and fast fashion models.

The importance of the model for seasonal fashion is the representation of the timeline, the planning stages and the 'open to buy' process. In the fast fashion model the importance is that the timeline represented and the new knowledge that fast fashion retailers still use seasonal fashion and bought-in fashion for the largest proportion of the fast fashion range. Retail buyers using ready-made bought-in fashion has become a significant strategy for dealing with fast fashion. This is not 'true' fast fashion because the risks have been taken many months before decisions were required. These findings are new in this research area and were not discussed previously in the literature.

Models previously produced for product development were about the buying. There was a lack of trend forecasting in the model planning stages. Trend forecasting was not explicitly represented. Designers were also using trend forecasting information but this was not represented in current product development models or highlighted in areas for further development. The alternative trend forecasting was used for the 'open to buy' process had not been specified earlier and bought-in ready-made fashion was referred to as fast fashion. The priority for previous research had not been concerned with explaining the stages in the product development process where trend forecasting was implemented. The relationships and communication channels between the buyers and designers had not been discussed as to how trend forecasting information was used when range planning. The



timescales involved in the 'open to buy' process and the product lead times for fast fashion in the supply chain process had not been recorded.

The current fashion forecasting system is reliant on long lead times. The rise of fast fashion provided the opportunity to identify a taxonomy of models with a shortened time frame. Comparisons of the timescales and process used within the design sector of the industry have been drawn to ascertain standard models for product development. This data collection was used to establish the new models for seasonal and fast fashion contexts. The outcomes of the consultation with industry professionals developed a new base of information which resulted in the revised models adding to new knowledge in a way that has not been done before. These findings were critical in that it provided a better understanding of the methodology of trend forecasting and are new in these research areas which have not been discussed in current published literature.

The revised models developed during this research will benefit companies to handle fast paced fashion. Stage 7 of the SSM which focuses on 'actions to improve' provides the opportunity for continuous improvement process. There is still a problem with the application of trend forecasting in relation to fast fashion for more informed decisions that can operate at the dynamic pace required for fast fashion. 'Open to buy' is a successful system; better use could be made of this system to allow companies achieve efficiency in terms of using the trend forecast. This system allows the shift from satisfying forecasted demand to satisfying 'real time' demand for fast fashion.

This research contributed to a synthesis of information relating to trend forecasting in contemporary design, marketing and retailing environments. It provides a firm and expansive foundation linking the process and practice in the design of the models for industry, creating a significant new knowledge for the product development. The critique of the models carried out using SSM highlighted areas that were not discussed before. The seasonal model added new insights especially where the trend package could be implemented in the product development process effectively. The diversity of the role of the PLM was also highlighted. In the fast fashion model the bought-in fashion range was identified as being the solution to fast fashion. The 'open to buy' process was presented in the timeline in the model and identified as a strategy for coping with close to season

fashion. The original contribution to knowledge lies in the seasonal and fast fashion models developed in this research, which would facilitate the key personnel involved in the fashion industry to incorporate in their new product development. This results in greater involvement of personnel leading to efficient utilisation of time, resources and expertise in the trend forecasting process. Little exists within current studies on the use of trend forecasting in contemporary design and retail environment which is represented in the new models.

## **9.2 Recommendations for further study**

Completion of this research allowed for the recognition of important considerations for both future research and development. Throughout this research areas of potential development and exploration were continually evident regarding:-

**Models used in the fashion industry:** The proposed new models which could be taken up with the fashion industry and data collected to further improve the system models. There is still a problem with trend forecasting and fast fashion in that there is a need for more informed decisions that can operate at the dynamic pace of fast fashion. Trend forecasters imitate a celebrity style for which they do not possess the infrastructure that allows them to apply the trend. They need 'real time' trends based on demand which originate from current influences. The 'open to buy' system is successful, better use could be made of this system which is a more intelligent approach to use for fast fashion. A clear policy and strategy is required for reacting and handling fast fashion. The product development process requires bringing closer to market through the seasonal model; fast fashion needs to work with the system to make it speed up. The focus should be on using trend information to achieve aim 4.

**For SSM in actions to improve, for stage 7:** The potential implication of these models for industry is the commercial advantage to companies to improve their situation in terms of using the trend forecasting to meet the timescales for seasonal and fast fashion. In the fashion industry for seasonal fashion the short term range planning is chaotic and fast fashion is in a continual flurry of activity which is not guaranteed to produce fast fashion. There is a need for streamlined approach to the fast fashion side. For future research there needs to be a change in their strategies, by bringing trend forecasting closer to market

demand. This can be carried out through the route of 'pulse data' for industry. The aim of 'pulse data' is to predict commercial insight through a company's data and interpret it to support business decisions and create operational efficiency. The models could then be applied to individual client's needs and used as a blue print for seasonal and fast fashion retailers.

**The PLM role could be further investigated to provide future research:** In terms of why this role is used, how it is justified and what does it add to the product development process. The retailers are diverse; this role found a level of commonality and diversity in this current research but it may not have captured greater diversity than people normally assume. Therefore it is a fruitful area of research to meet aim 4.

**For educational purposes:** This research area could be applied to fashion design, fashion marketing and fashion promotion courses, with a focus on trend forecasting providing important background knowledge to prepare students for industry.

Consultancy opportunities have already arisen for the researcher to join a panel of global expert advisers with a prominent trend forecasting agency for interior design. The panel of experts discuss issues that affect the future forecast, assess the attitude of consumers and look for the development of niche markets to gain an insight into the effects of globalisation on fashion, marketing trend forecasting, technology, lifestyle and ethical issues.

This study requires the investigation of a number of interrelated areas of the fashion industry. They are interpreted and presented in a format that illustrates the understanding of the results. The key areas contribute to the development and application of this work which are the trend forecasters in the trend forecasting agencies and the designers and buyers working in the fashion industry. Previous research has focussed on mainly the buyer's role in the retail sector and the buying functions in relation to the product development process. The designer's role has been found to be less prominent for discussion by authors within the context of the research required for this study. The trend forecaster's role and the trend forecasting process has been discussed by authors from the

viewpoint of what information they researched to produce the trend forecast but not the methodology of the process undertaken within the trend forecasting agency.

It is now becoming apparent that there is a move toward research discussing the creative side of the fashion industry in journal publications. Future developments will see further investigation into modelling trend forecasting data in other commercial areas of the fashion industry, such as styling and the textiles. The focus should be on using trend information to achieve aim 4. The data collected could be applied to SSM to further improve the current system and would be useful for companies to improve their situation. This research would be useful to feedback into higher educational courses for design, marketing and placement grounding to prepare students for industry.

### **9.3 Limitations**

The small number of interviews conducted in relation to the size of the industry may have inhibited the interview results. A larger survey may have resulted in the realisation that the exceptions illustrated in the revised models, such as the PLM role in the seasonal model, the 'additions' to the ranges in the model for Mexx, Puma and Bench and the inclusion of the bought-in fashion range for Boohoo and ASOS that appeared to be particular to that company may actually have been more common than realised. This is further compounded by lack of supporting data from industry because the changes to the models can only achieve stage 7 of the SSM if industry responds to the suggested changes.

Stage 7 arising from the models has not been implemented by industry. Therefore the full cycle has not been completed. The models stopped at the recommendations stage. The changes to the models can only achieve stage 7 of the SSM if industry responds to the suggested changes.

Processes are continuously modified in a constantly changing industry. Trend forecasting is not an exact science, and is relying on intuition and skill for interpretation of data by professionals which is time bound because of the nature of the industry.

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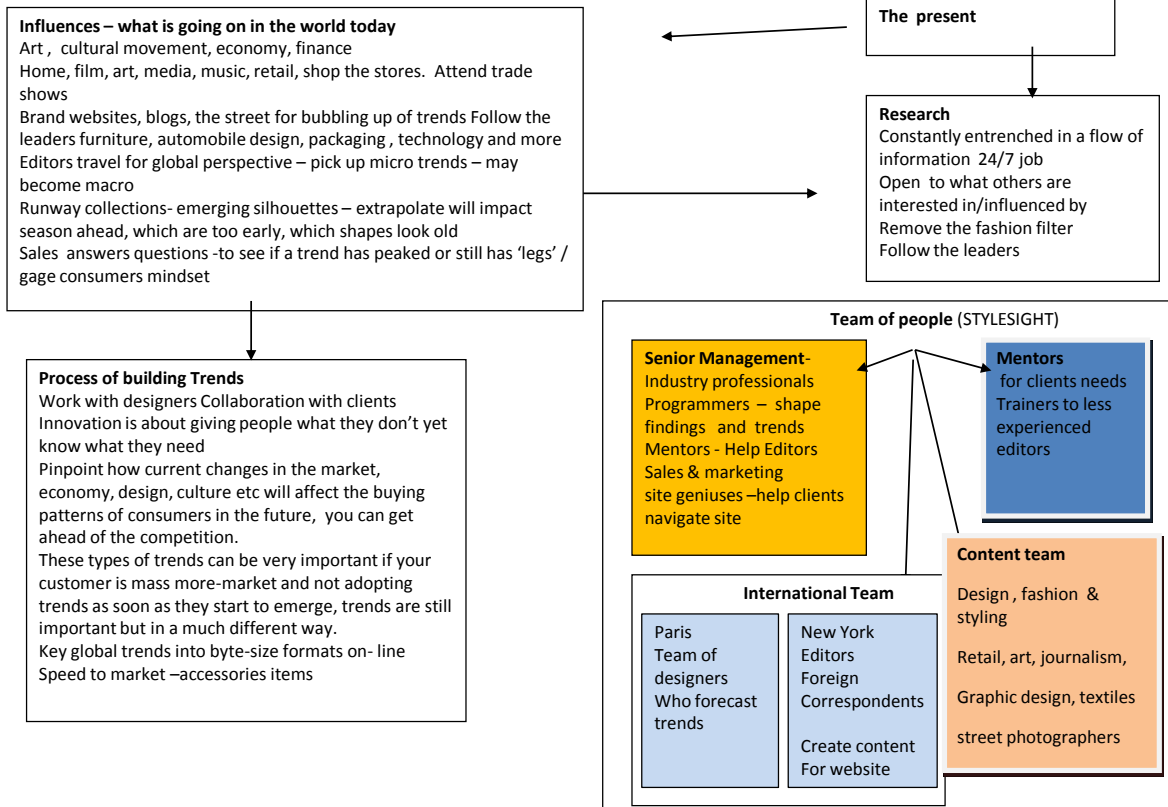
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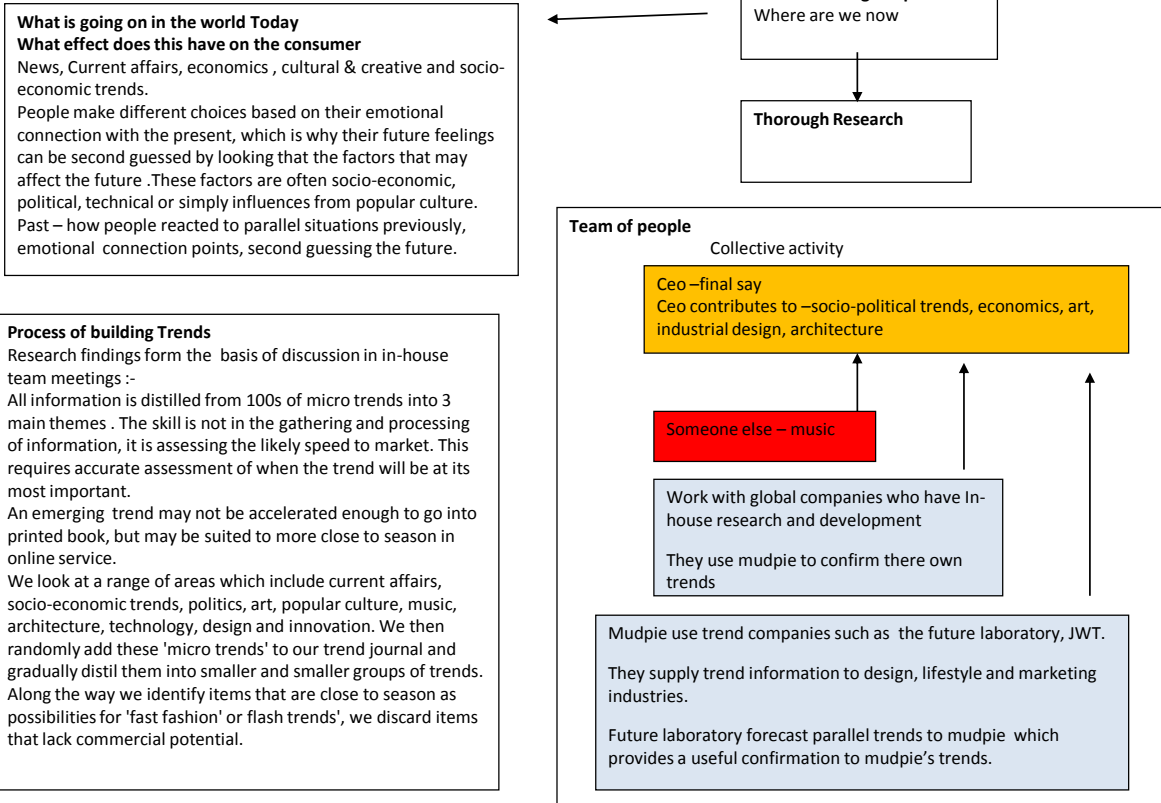
# APPENDIX A : Case study - Stylesight

TRENDS FORECASTING MODEL OF SEQUENCE OF DEVELOPING A TRENDS PACKAGE – taken from  
**STYLESIGHT Interviewee** -Trend Forecasting Agency



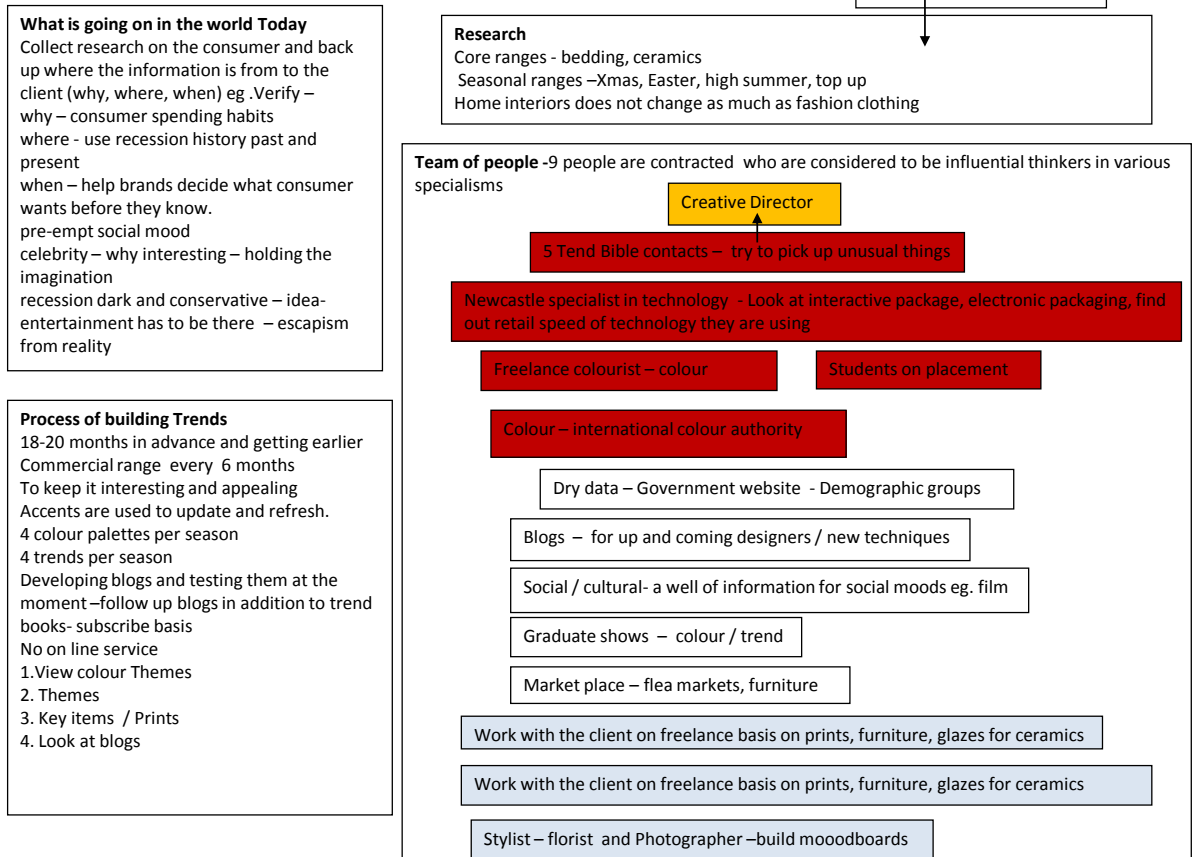
## APPENDIX B: Case Study – Mudpie

### TRENDS FORECASTING MODEL OF SEQUENCE OF DEVELOPING A TRENDS PACKAGE – taken from MUDPIE Interviewee -Trend Forecasting Agency



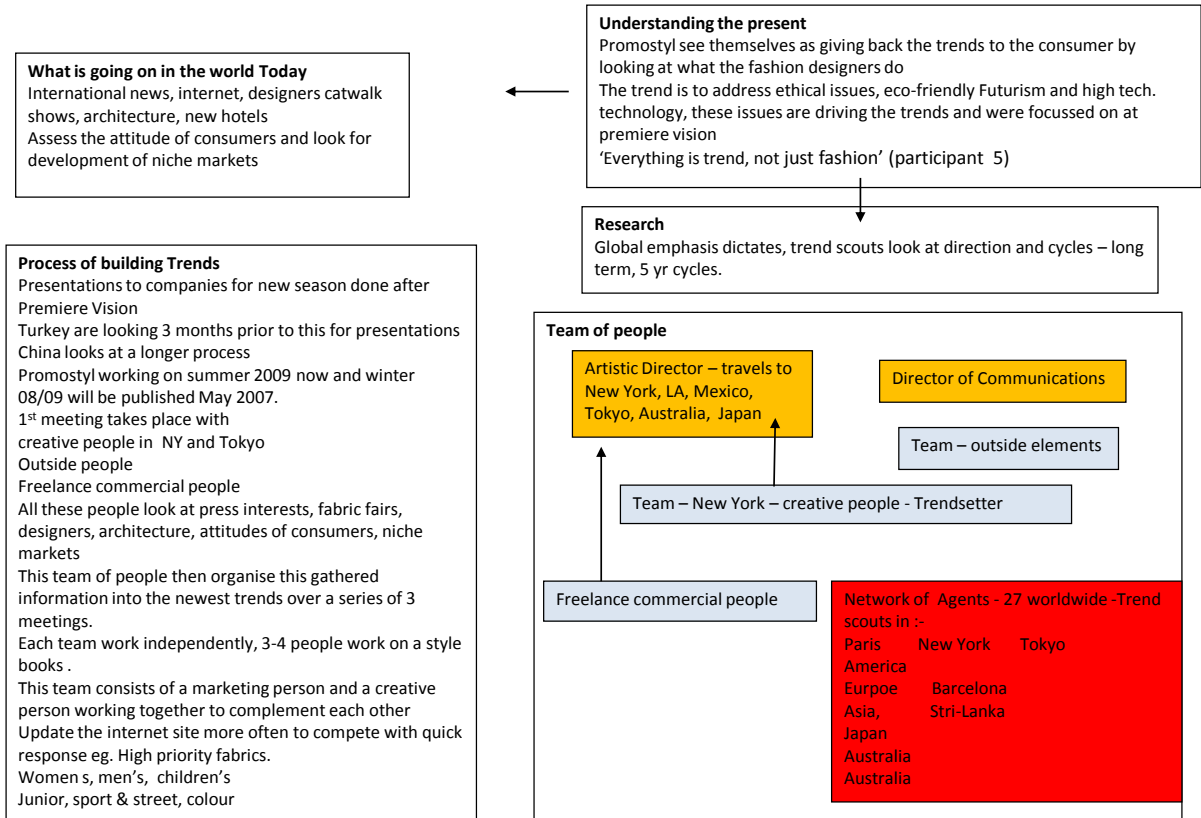
# APPENDIX C: Case Study - Trend Bible

**TRENDS FORECASTING MODEL OF SEQUENCE OF DEVELOPING A TRENDS PACKAGE** – taken from **Trend Bible Interviewee** -Trend Forecasting Agency



# APPENDIX D: Case Study - Promostyl

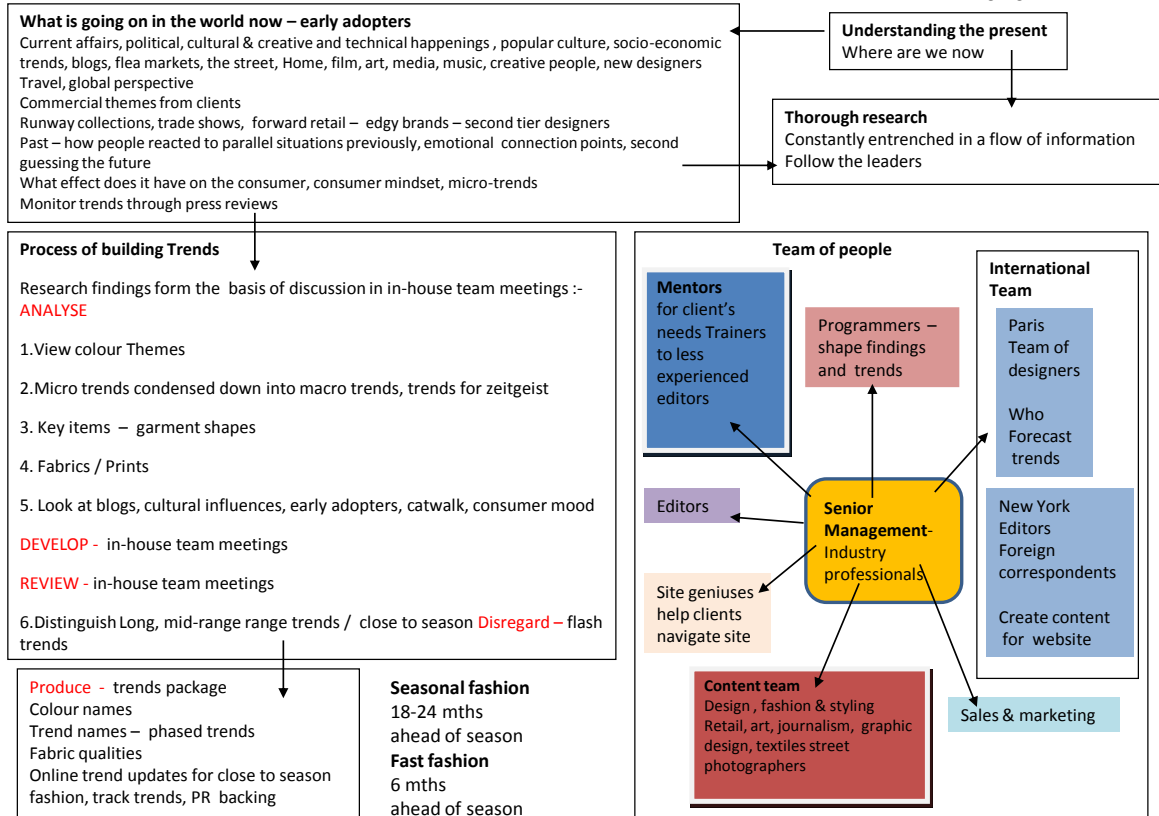
TRENDS FORECASTING MODEL OF SEQUENCE OF DEVELOPING A TRENDS PACKAGE – taken from Promostyl Interviewee -Trend Forecasting Agency



# APPENDIX E: The trend forecasting agency model

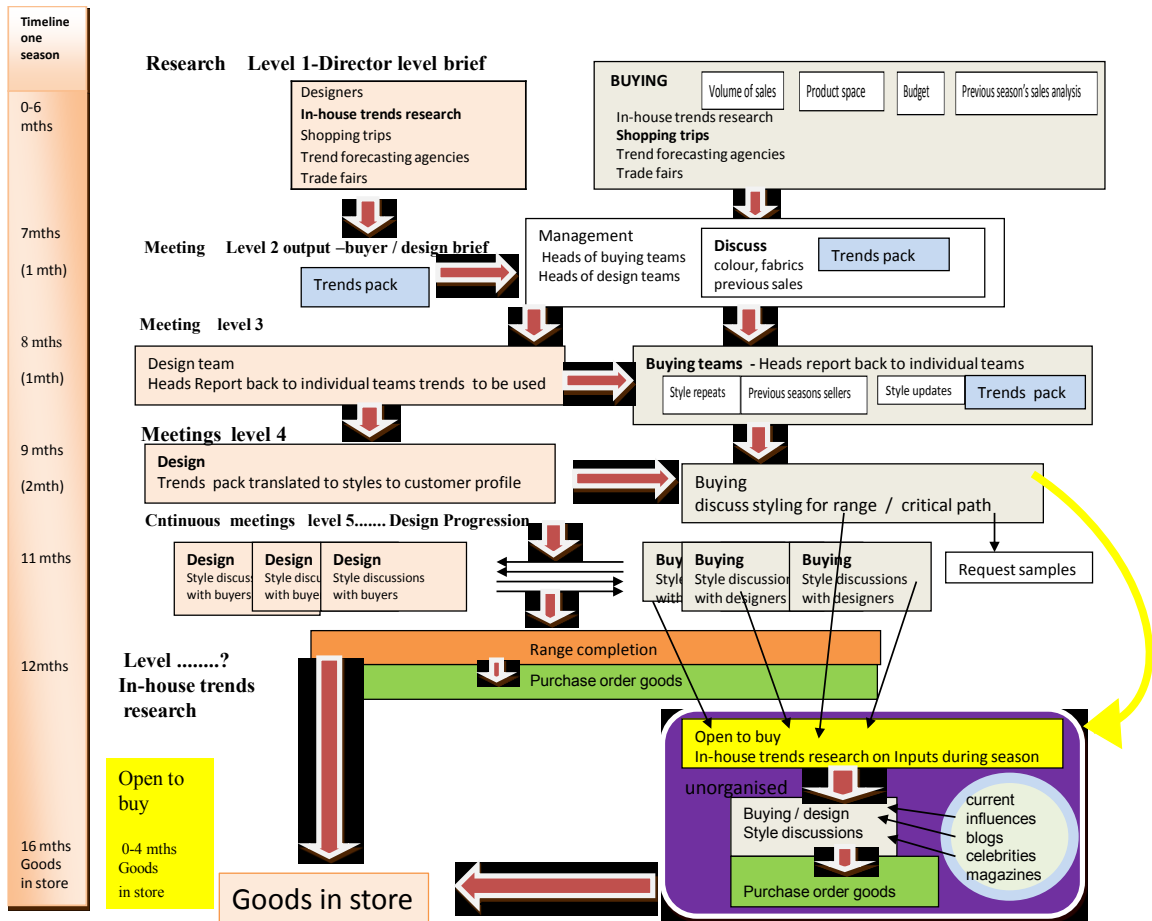
## THE TREND AGENCY FORECASTING MODEL - THE SEQUENCE OF EVENTS

WHEN DEVELOPING A TRENDS PACKAGE – themes taken from all the interviewees from the Trend Forecasting Agencies

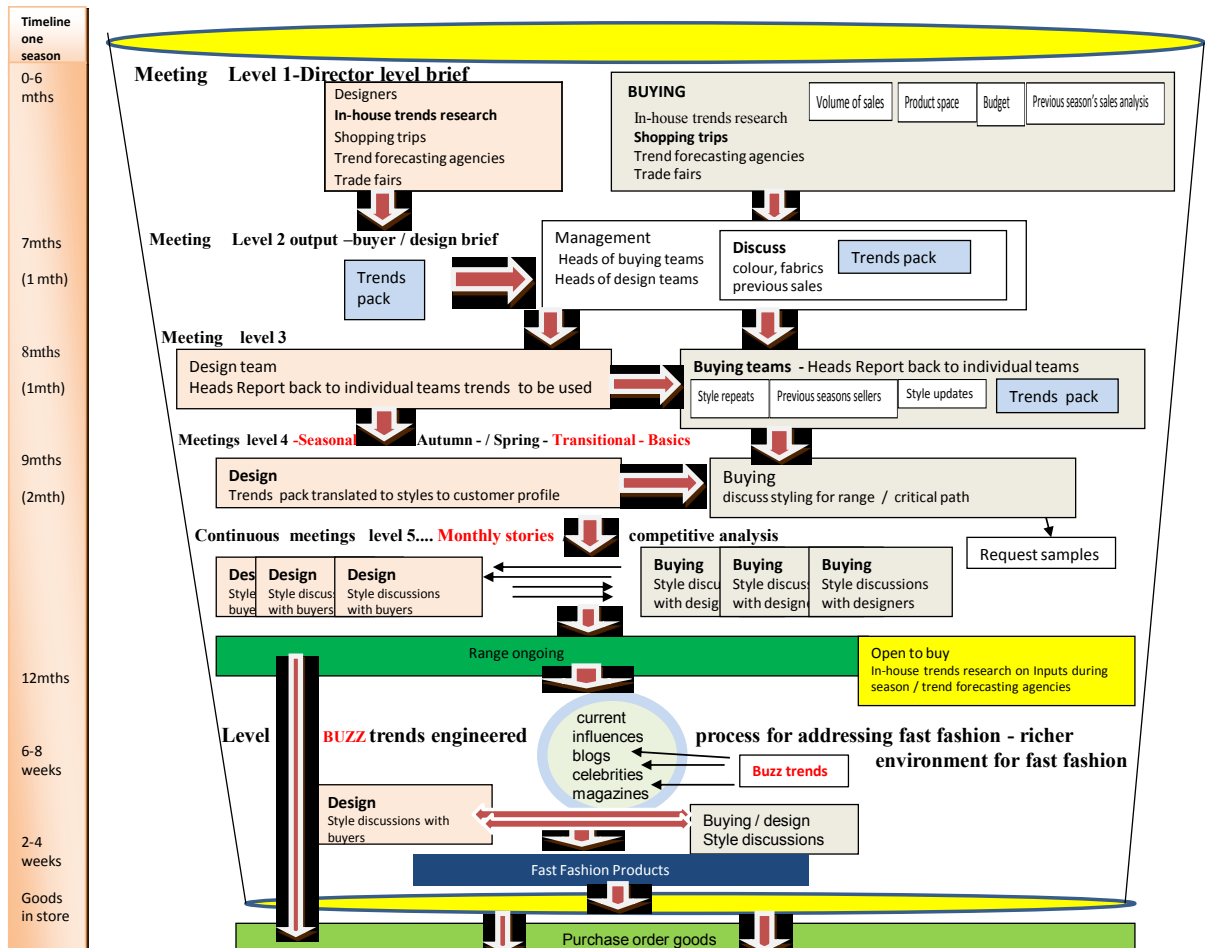




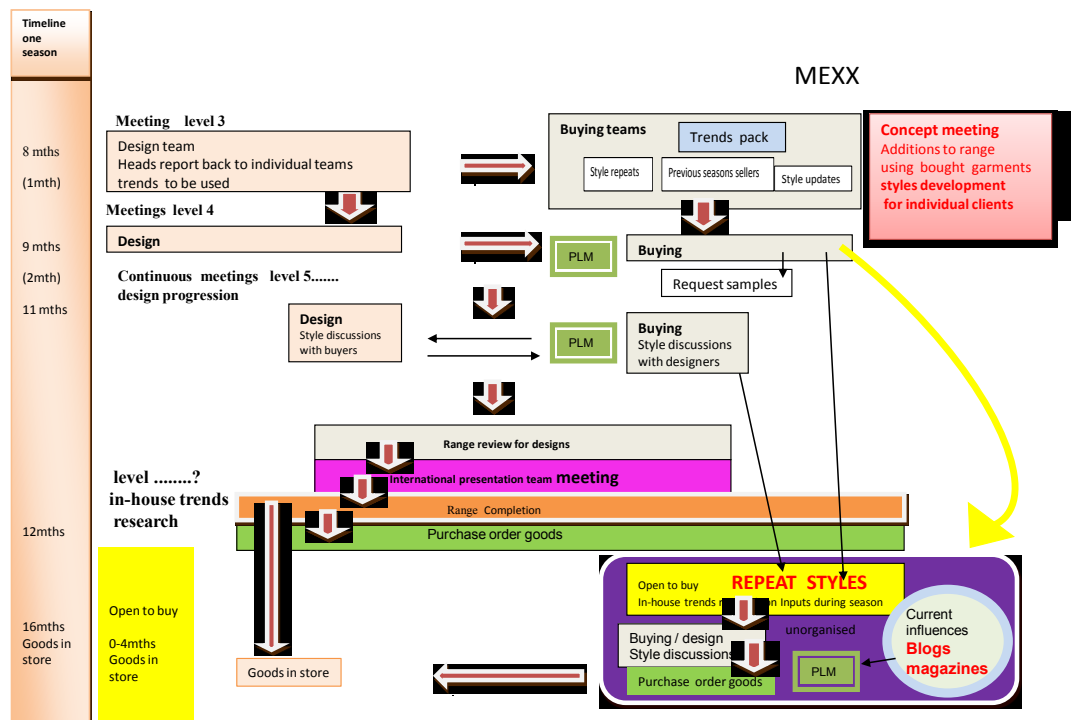
# APPENDIX F: Fashion forecast seasonal model



# APPENDIX G: Fashion forecast fast fashion model



## APPENDIX H: Concept meeting / ‘additions’ to range for Mexx

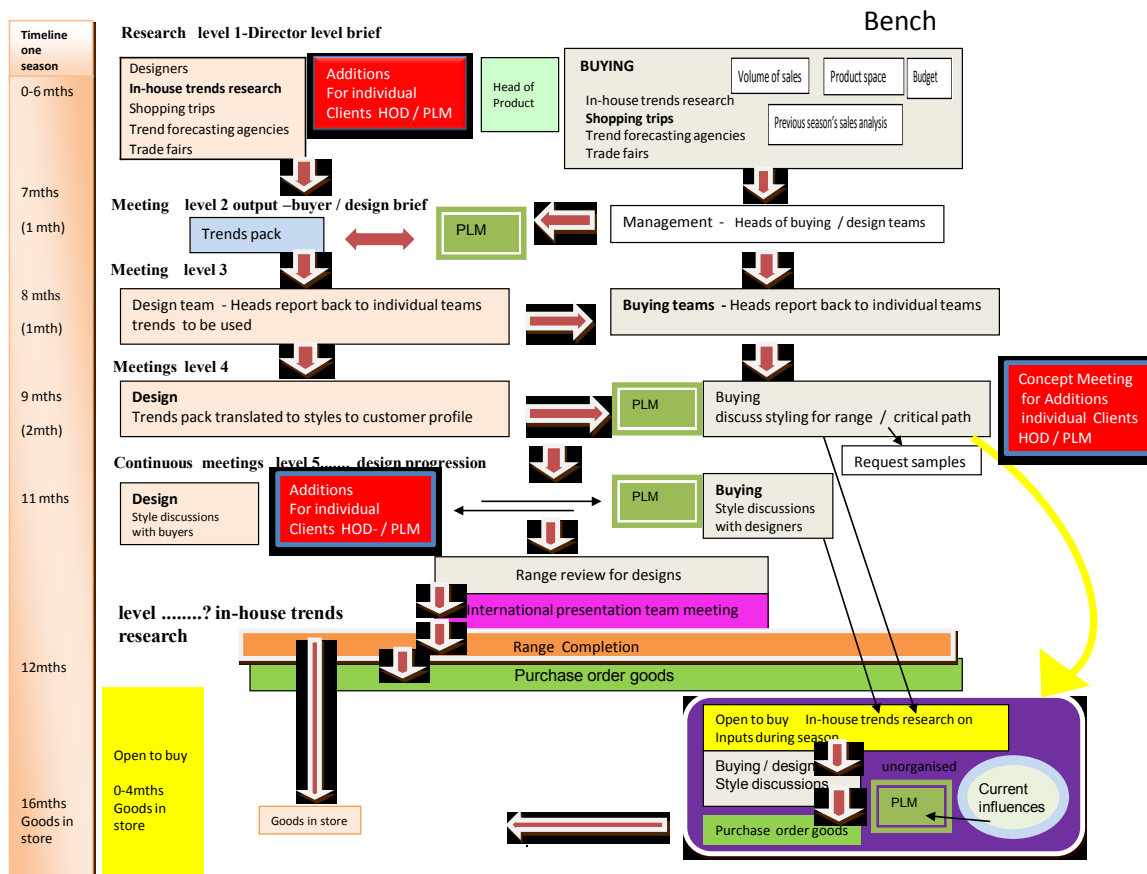


Concept meeting / ‘additions’ to range for Mexx

Level 1 and 2 not shown as unaffected by change

Mexx personnel commented they discussed ‘additions’ to the range, which were additional garments incorporated into the range. The styling influence for these ‘additions’ was taken from garments which had been bought from their competitors on the high street. These garments were used to influence new styles for individual clients such as Debenhams, J D Williams and ASOS, discussed at level 3 in the model.

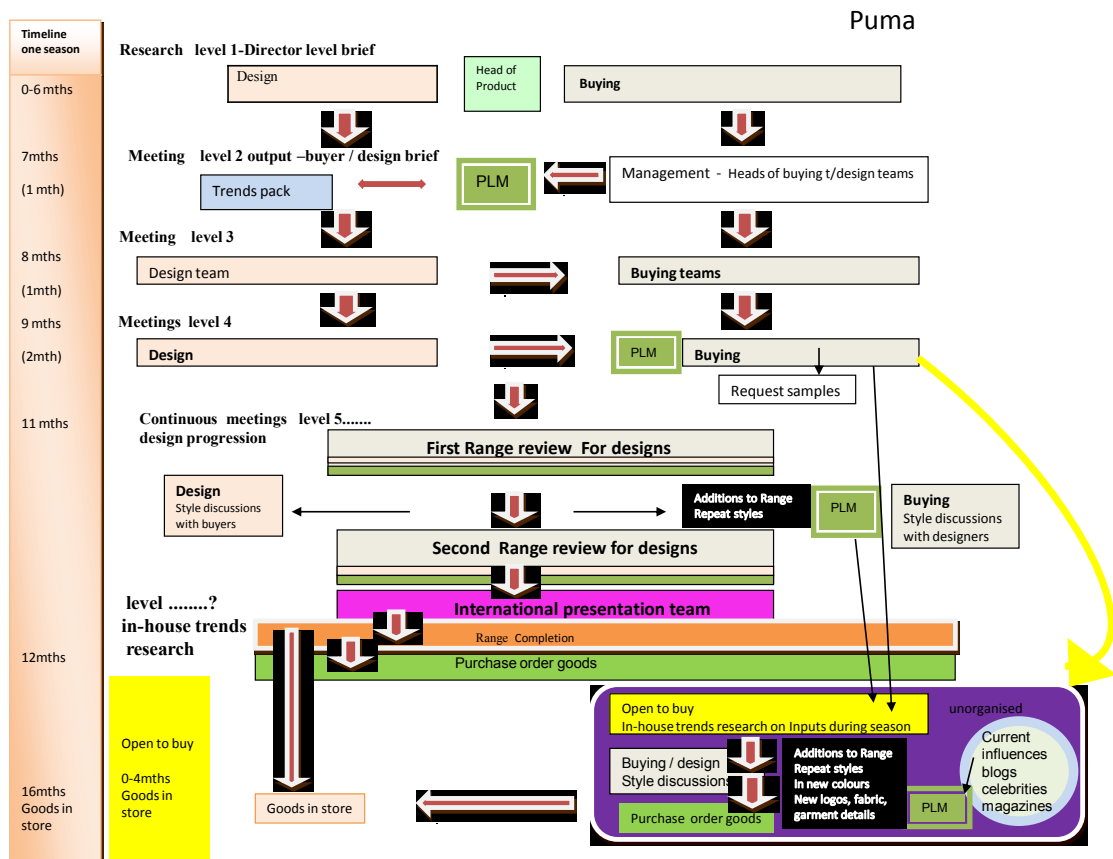
# APPENDIX I: 'Additions' to the range for Bench



'Additions' to the range for Bench

Bench personnel commented 'additions' were discussed at level 1 in the model, the concept meeting for these additions was held at level 4 and the 'additions' included into the range at level 5.

## APPENDIX J: The range reviews and ‘additions’ to the range for Puma

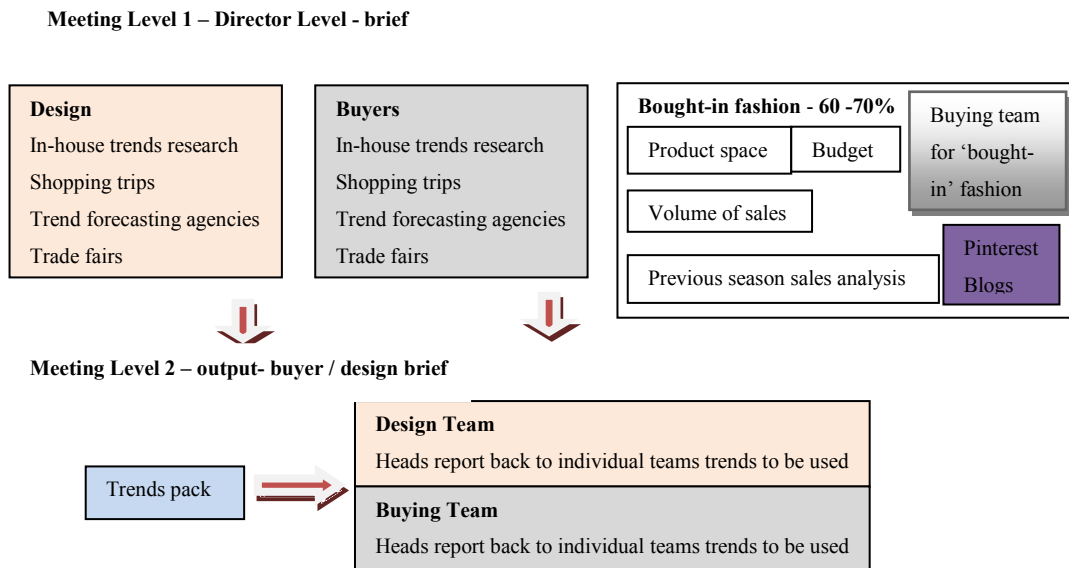


The range reviews and ‘additions’ to the range for Puma

Level 5 onwards is in more detail, levels 1- 4 in the model are unaffected.

Puma personnel stated they held two range reviews, 50% of their range was presented at level 4 and 50% was presented at level 5 as illustrated below. Unplanned additions are added to the range at level 5 for ‘open to buy’ relying on repeated styles and ‘current influences’ for trends.

## APPENDIX K: Representation of the ‘bought-in’ fashion range for ASOS



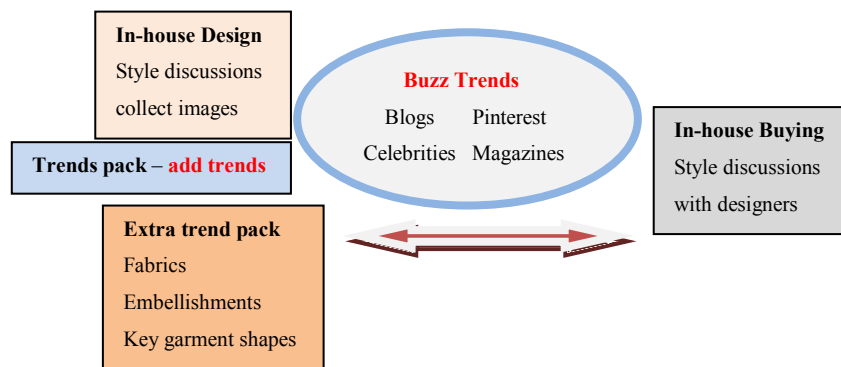
### Representation of the ‘bought-in’ fashion range for ASOS

Other levels in the model unaffected

At level 1 and 2 the in-house design and buying team work on the range plan independently from the ‘bought-in’ fashion buying team. ASOS personnel commented they used a separate buying team for the ‘bought-in’ fashion range being processed at level 1. Pinterest and blogs were referred to for trend updating for this process. The researcher found that other companies such as H&M, Primark and Boohoo used the same buying team to process all the fashion ranges, therefore for this reason it was not changed in the proposed new fast fashion model.

## Appendix L: Fast fashion trend influences for Boohoo – ‘Buzz’ trends

Level 5 - Continuous meetings.... **Monthly stories** / competitive analysis



Fast fashion trend influences for Boohoo – ‘Buzz’ trends

Level 5 in the model, other levels in the model unaffected

Boohoo personnel commented that they introduced extra books for fabrics, trims, embellishments and key garment shapes and added extra trends to the trends pack at level 5.

## **APPENDIX M: Questions for the trend forecasting personnel**

- 1. How does the trend forecasting process work?**
- 2. Do you work to a particular model (process / time)?**
- 3. How are decisions made?**
- 4. How do you build the trends?**
- 5. Who uses trend forecasting?**
- 6. Is it the driving force of the fashion business?**
- 7. What depth / range of trend information are available?**
- 8. How does trend forecasting work in conjunction with quick response issues?**
- 9. Main competitors?**
- 10. Are the trends directed at specific markets/global markets?**
- 11. How does the consumer benefit / who dictates?**
- 12. How have celebrity endorsement / copying affected trend forecasting?**

### **Confidentiality**

Exerts from these interviews will be used for educational projects and possibly publication into educational journals. The results of this research will remain confidential and under no circumstances will names be mentioned without prior consent. All ethical issues will be addressed prior to interviews and respondents can withdraw from the interviews at any time.

Chris Twine MSc.

Senior Lecturer

Dept. of Clothing, Design & Technology, Hollings Faculty, MMU.



## **APPENDIX N: Questions for the retail buyers - pilot version**

### **TREND FORECAST**

- 1. What use is trend forecasting in the product development process?**
- 2. How effective is trend forecasting in the product development process?**  
**Probe - rely on trends? / are they confident?**
- 3. Have you tried to measure the predicted sales or have you an accurate sales success rate?**
- 4. How do you build the trends into your ranges?**
- 5. How do you make a decision?**
- 6. How do you use trend forecasting?**
- 7. What options of trend information is available to you as a company?**
- 8. Who do you use for trend forecasting?**
- 9. Is fashion forecasting the driving force of the fashion business?**
- 10. How does fashion forecasting work in conjunction with quick response issues?**
- 11. What are the criteria for quick response issues in their supply chains?**
- 12. Do you find certain products are unsuccessful because of the trend choice?**
- 13. Has trend forecasting given you a competitive edge?**
- 14. Does the competition forecast trends better than you do?**

15. Do you use trend forecasting for specific markets?

Probe - Countries, cultures same products everywhere?

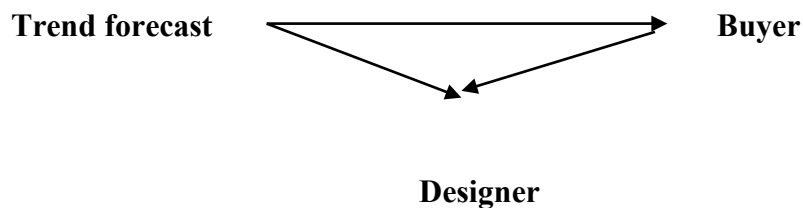
Forecasting for the UK or other - China - global

16. How is the process managed?

17. Trend forecasting prospective environmental issues?

### SUPPLY CHAIN

18. How does the consumer benefit / who dictates? / Where is relative weight to trend forecasting?



19. How has celebrity endorsement of products / fast fashion or copying affected trend forecasting in relation to your existing supply chain?

Probe - Celeb fashion - can't predict?

Engineer celeb fashion?

Copying - faster supply chain

Implications for the supply chain?

20. Can retailers escape trend forecasting?

21. How does collaboration with the designer / manufacturer / fabric supplier affect your decision making in product design?

Probe – Communications between designers / buyers?

Collaboration with your supply chain regarding product development?

## **PROCESS MODEL**

**22. What timescales are used in planning the various ranges?**

**Probe - long / short term cycles / fast fashion trends?**

**23. Can you qualify the sector it applies to?**

**Probe -**

- **menswear**
- **women's wear**
- **children's wear**

**24. Do you work to a particular model (process) when planning new ranges?**

**Probe - seasonal fashion / fast fashion?**

**25. Could you explain your process model/s used for planning?**

**Probe - process / stages?**

**26. Is there one standard model for product development being implemented?**

**Probe - best practice model – stability / varies by country? Garment types?**

**27. Could there be a series of models implemented for product development?**

### **Confidentiality**

Exerts from these interviews will be used for educational projects and possibly publication into educational journals. The results of this research will remain confidential and under no circumstances will names be mentioned without prior consent. All ethical issues will be addressed prior to interviews and respondents can withdraw from the interviews at any time.

## **APPENDIX O: Questions for retail buyers - final version**

### **TREND FORECAST**

**1. What use is trend forecasting in the product development process?**

**2. How effective is trend forecasting in the product development process?**

**Probe - Measure success rate / track sales?**

**Rely on trends? / escape trend forecasting / confident against competition?**

**3. How do you build the trends into your ranges?**

**Probe - How do you make decisions / roles / stages / trend selection?**

**4. Who do you use for trend forecasting?**

**5. Is fashion forecasting the driving force of the fashion business?**

**6. How does fashion forecasting work in conjunction with quick response issues?**

**7. What are the criteria for quick response issues in their supply chains?**

**8. Has trend forecasting given you a competitive edge?**

**9. Do you use trend forecasting for specific markets?**

**Probe - Countries, cultures same products everywhere?**

**Forecasting for the UK or other - China - global**

**10. How is the process managed?**

### **SUPPLY CHAIN**

**11. How has celebrity endorsement of products / fast fashion or copying affected trend forecasting in relation to your existing supply chain?**

**Probe - Celebrity fashion – can't predict?**

**Engineer celebrity fashion?**

**Implications for the supply chain?**

**Copying - faster supply chain?**

**12. How does collaboration with the designer / manufacturer / fabric supplier affect your decision making in product design?**

**Probe - Communication channels between designers / buyers?**

**Collaboration with your supply chain regarding product development?**

### **PROCESS MODEL**

**13. What timescales are used in planning the various ranges?**

**Probe - Long / short term cycles / fast fashion trends?**

**14. Can you qualify what garment type the timescale applies to?**

**Probe -**

- **Menswear**
- **Womenswear**
- **Childrenswear**

**15. Do you work to a particular model (process) when planning new ranges?**

**Probe - seasonal fashion / fast fashion?**

**16. Could you explain the process model/s used for planning?**

**Probe - Process /stages?**

**17. Is there one standard model for product development or a series of models implemented for product development?**

**Probe - Best practice model - stability/varies by country?**

**Critical path for garment types?**

### **Confidentiality**

Exerts from these interviews will be used for educational projects and possibly publication into educational journals. The results of this research will remain confidential and under no circumstances will names be mentioned without prior consent. All ethical issues will be addressed prior to interviews and respondents can withdraw from the interviews at any time.

## **APPENDIX P: Testing the revised models with industry personnel retailers**

- 1. Is the trend pack represented in the correct levels in the model?**
- 2. Is ‘open to buy’ accurately represented in terms of the process, timeline and trend forecasting used?**
- 3. Can you confirm the timeline is accurate and realistic?**
- 4. Are the personnel represented correctly in the models?**

**Is the PLM represented in the correct stages in the seasonal model?**

- 5. Are the range reviews and personnel involved represented correctly in the seasonal model?**
- 6. Is the terminology appropriate and correct in the fast fashion model?**
- 7. Is the fast fashion range accurately represented in the fast fashion model?  
Is the ‘bought-in’ fashion accurately represented in the fast fashion model?**
- 8. Are there any stages / levels not represented?**

### **Confidentiality**

Exerts from these interviews will be used for educational projects and possibly publication into educational journals. The results of this research will remain confidential and under no circumstances will names be mentioned without prior consent. All ethical issues will be addressed prior to interviews and respondents can withdraw from the interviews at any time.

## **APPENDIX Q: Letter of introduction**

Manchester Metropolitan University  
Hollings Faculty  
Dept. of Clothing Design & Technology

Dear

I am a senior lecturer in clothing design at MMU, Hollings Faculty doing some research into the use of trend forecasting in contemporary design, marketing and retailing environments. I am looking how and where trend forecasting is incorporated into the product development process in the fashion industry.

I would appreciate anyone in the trend forecasting, design, buying or product development field who could spare a little time to answer some questions to help me with my research.

Enclosed is an outline about this research and a set of questions. These can be answered face to face, over the telephone or by email. (This should take no more than 30 mins. of your time). All information will be kept confidential.

Please email [c.twine@mmu.ac.uk](mailto:c.twine@mmu.ac.uk) or phone 0161-247-2613 if you can help

Yours Sincerely

Christine Twine. MSc.

## **Appendix R: Outline of research**

### **Research**

The application of trend forecasting in contemporary design, marketing and retailing environments

### **Aim of the Research**

Identify how and where trend forecasting is incorporated into the product development process in the fashion industry.

Design models relating theory and practice of new product development and trend forecasting.

### **Background**

Trend forecasting is widely used by fashion designers and buyers throughout the range development process. The fashion forecaster's role is to identify style trends by addressing what is likely to happen now and in the future working closely with the retailer, buyer and manufacturer. The retail buying experience is built around improvements, revisions to existing product lines and the incorporation of new products. Initial contact with industry personnel indicated that their business is being affected by the fast fashion phenomenon. Fast fashion has been acknowledged in the fashion press and within the industry as being a key strategy for success for fashion retailers, adopting a strategy of constantly renewing their product ranges with fashion led styles to entice the consumer (Barnes and Lea-Greenwood 2006).

The fast fashion marketing strategy raises an issue for the fashion industry in terms of product lead times for manufacturers, product buying cycles for retailers and the role of trend prediction for fashion forecasting agencies. Traditional lead times required by industry to produce garments and sell them to retailer's means that forecasters work two years ahead (Diane and Cassidy 2005). Now some companies shorten the cycle using just in time systems which can be credited to changes in consumer lifestyle as the constant demand for newness has exerted pressure on the established supply chain format (Waddell 2006). The effect of globalisation on fashion, marketing and trend forecasting, touching on lifestyle, technology and ethical issues and the availability of mass media has raised consumer expectations (Jackson and Shaw 2009). This suggests the hypothesis that consumers are the driving force of fashion rather than the retailers and raises the research question how trend forecasting information is used? The research aims address these issues in the context of the UK clothing sector.

### **Method of research**

Interviews conducted with personnel from UK fast fashion retailers and seasonal fast fashion retailers, to ascertain how contemporary trend forecasting services are incorporated into the product development process in the fashion industry.

### **Confidentiality**

Exerts from these interviews will be used for educational projects and possibly publication into educational journals. The results of this research will remain confidential and under no circumstances will names be mentioned without prior consent. All ethical issues will be addressed prior to interviews and respondents can withdraw from the interviews at any time.

**Respond to:-** Christine Twine MSc.

Senior Lecturer - Clothing, Design & Technology Tel. 0161 247-2613, E-mail – c.twine@mmu.ac.uk  
Hollings Faculty, Manchester Metropolitan University



## APPENDIX S; River Island - (Women's casual cottons) - process model

Retailer	Head of Design Designers	Head of Buying Buyers / Merchandisers	Timeline 12 mths
River Island	Discuss ideas, trends, source samples design ideas / liaise with the buyers for design direction	Liaise with designers for design direction	1 <sup>st</sup> Detail Meeting Every 6mths
	Produce trend pack - Prints, shapes, texture, colour Check collections PV, Elle.com, Style.com Images collected	Liaise with the buyers on designs ideas, colour, fabrics Buyers take fashion images to Turkey	1 <sup>st</sup> Review Meeting - Every 3mths
	Breakdown of prints / fabrics Discuss style direction / liaise with buyers Merchandiser works with teams	General breakdown of prints / fabrics Discuss previous seasons styles Buyer make lead decisions over designers /previous sales drives decisions evidence on which to base new ranges	2 <sup>nd</sup> Detail Meeting - Every 6mths
	Range plan discussion with buyers	Range plan discussion 'open to buy'	Continual Meetings
		Sign-off range plan	Mini Review

River Island - Key seasons which are split up in months rather than just AW/ SS seasons  
 NDJ= Nov/ Dec/ Jan      FMA= Feb/ March/ April  
 MJJ= May/ June/ July      ASO=Aug/ Sep/ Oct

## APPENDIX T: Shop Direct process model

Retailer	Head of design Designers	Head of Buying Buyers / Merchandisers	Timeline 12 mths
Shop Direct	Trends, details, colour	Discuss set items to replace previous best sellers	Main range 12 mths in advance Fast fashion 4mths in advance
	Produce trend pack - print, shapes, texture, colour	Range plan discussion Liaise with designers	
	Discuss style direction Liaise with buyers	Range plan discussion Liaise with designers for design direction 'Open to buy' - 'Unique' range 'One off' designs Catwalk to click	'Open to buy' 4mths in advance 8-10 wks in advance 6-8 wks in advance
	Discuss style direction Liaise with buyers	Interiors	12 wks rotational
		Sign-off Far East products	Online fashion 6 mths in advance

## APPENDIX U: Tesco process model

Retailer	Head of design Designers	Head of Buying Buyers / Merchandisers	Timeline 12 mths
Tesco	Trade fairs, WGSN Travel / Inspiration Comparative shopping	Current season sales analysed on an ongoing basis, best sellers continually updated or repeated, volumes were increased on the previous year or season Design brief created from bought samples	Main range 12 mths in advance
	Produce trend pack prints, shapes, texture, colour, details Discuss style direction Liaise with buyers Freelance designers	Range plan discussion - Liaise with designers for design direction. Focus on key garment shapes/ press days create 'looks' Menswear little changed per season. Women's wear set space allocation / products Key shapes - re-coloured newness. Lingerie / Swimwear, basic shapes repeated colour, trims or fabrics changed.	Worldwide Production centres
	Discuss style direction Liaise with buyers	'Open to buy' Liaise with designers for design direction Celebrity fashion influenced styling	Rotational 3 mths discussion
		Sign-off products	

## APPENDIX V: Primark process model

Retailer	Head of design Designers	Head of Buying Buyers / Merchandisers	Timeline 12 mths
Primark	Travel, Trade fairs WGSN, Perclers, Blogs Fashion magazines	Travel Trade fairs, WGSN, Perclers	
	Style development from original samples magazine images Trend research / Plan sketches / Plan Specification sheets	Sourcing Far East India, Sri Lanka, Bangladesh Pakistan Turkey, Romania	May - S/S 2011 Dec - A/W 2010
	Discuss style direction  Liaise with buyers  Trend watching on high street	<b>Planning</b> Budgets, margins / 'Open to Buy' <b>Range Building</b> Product selection, Price points Grading, quantity Intake and phasing	May / June Monthly stories Transitional stories
	<b>Stories developed</b> Work wear Knitwear Tailoring Dresses Casuals Denim	Monitoring size ratios Fitting / sealing garments Approving colour, trims, fabric Quality / Packaging Customer feedback Monitoring sales / colour reaction Colour review to create 'newness'	Monitoring the critical path Specific markets UK, Europe Far East Asia
		Shortages of raw materials, Power shortages in China - 4 day week, Flooding - Bangladesh, Heat waves – India / religious holidays	External factors Allow for slippage in critical path
		Model / stylist - photo shoot	
		Internal 'Sign Off' Meetings	

## APPENDIX W: Matalan Process model

Retailer	Head of Design Designers	Head of Buying Buyers / Merchandisers	Timeline 12 mths
Matalan	Research tailored to customer profile Trend research-film, climate influences Fabric fairs, trade fairs	Trade fairs Trend research Previous best sellers	Jan 2009- Jan 2010
	Fabric selected for prototype garments / trends pack	Core range - trend led Fabric selected for Prototype garments	1 <sup>st</sup> deliveries
	Re-assess trends research Liaise with buyers for design direction	Mid range -Trade-up – luxury for less, investment pieces Liaise with designers for design direction	Lead times dependant on product type.
	Research catwalk styles – Sept 2010 Liaise with buyers for design direction	Celebrity influenced garments Top – up garments Liaise with designers for design direction	Lead times dependant on product type. 6-8 wks. delivery
	Liaise with buyers for design direction	‘Open to buy’ product specific fashion	

## APPENDIX X: H&M process model

Retailer	Head of Design Designers	Head of Buying Buyers / Merchandisers	Timeline 12 mths
H&M	Internal designers at head office interpret the latest fashion trends. Travel / Inspiration - street fashion, film, culture, the media, trend institutes, trend forecasters, trade fairs and exhibitions	Each concept range has its own design team – designers, buyers, assistants pattern makers, section manager and controller	
	Major / Minor trends – catwalk, street, traditional dress / individual style icons adapted to commercial fashion  Liaise with buyers for design direction	Designers, Pattern Makers, Buyers and planners work on themes, colours, fabrics Silhouettes / garment types selected Trends and ‘current influences’ adapted into styles / models for customer profile Samples requested for garment styles	
	Monitor- constantly trends / style influences  Liaise with buyers for design direction separate ‘Buzz’ team – celebrity type trends	High-fashion garments produced in limited quantities sold mainly in city stores Modern basics ordered in large volumes / distributed to stores	Worldwide Production centres for fast fashion team
	Liaise with buyers for design direction	Customer feedback contributes to inspiration for the Seasons collections	
	Liaise with buyers for design direction	Continual meetings / discussion for range plan / quantities critical path	

## APPENDIX Y: ASOS Process model

Retailer	Head of Design Designers	Head of Buying Buyers / Merchandisers	Timeline 12 mths
ASOS	In-house designers produce trend ideas for the new ranges Develop trend package / mood boards for the trends	Inspirational shopping trips - LA, Miami WGSN Buy samples Discuss trends, mood boards, key pieces for the season Bought-in fashion ranges discussed by separate buying teams	Every 3 mths  ongoing
	Meetings for range planning Trends pack Liaise with buyers for design direction- seasonal range  Online trends, current influences - Liaise with buyers for design direction	Planning meetings - discuss range plan Liaise with designers for design direction for seasonal range Critical path for range plan broken down into product types:- Petites, Swimwear Beach, Lingerie, Woven tops, Jersey tops, Casual bottoms, Denim Samples made up by suppliers and discussed for sign-off 'Open to buy' / repeat orders Liaise with designers for design direction	Every 3 mths
	Monitoring products for problem solving Liaise with buyers	Monitoring / problem solving / establish patterns on problem items Analyse / review the top eight returned styles per month Select products for best / poor sales Sign-off meetings	Weekly

**Fashion Forecast model**

**Theory meets practice**

**This is a realistic interpretation of the product development process stages when designing the garment ranges.**

**This model is a realistic interpretation of the use of trend forecasting information in the product development process stages.**

**This is a realistic timeline representation.**

.....**Mar 2014.**

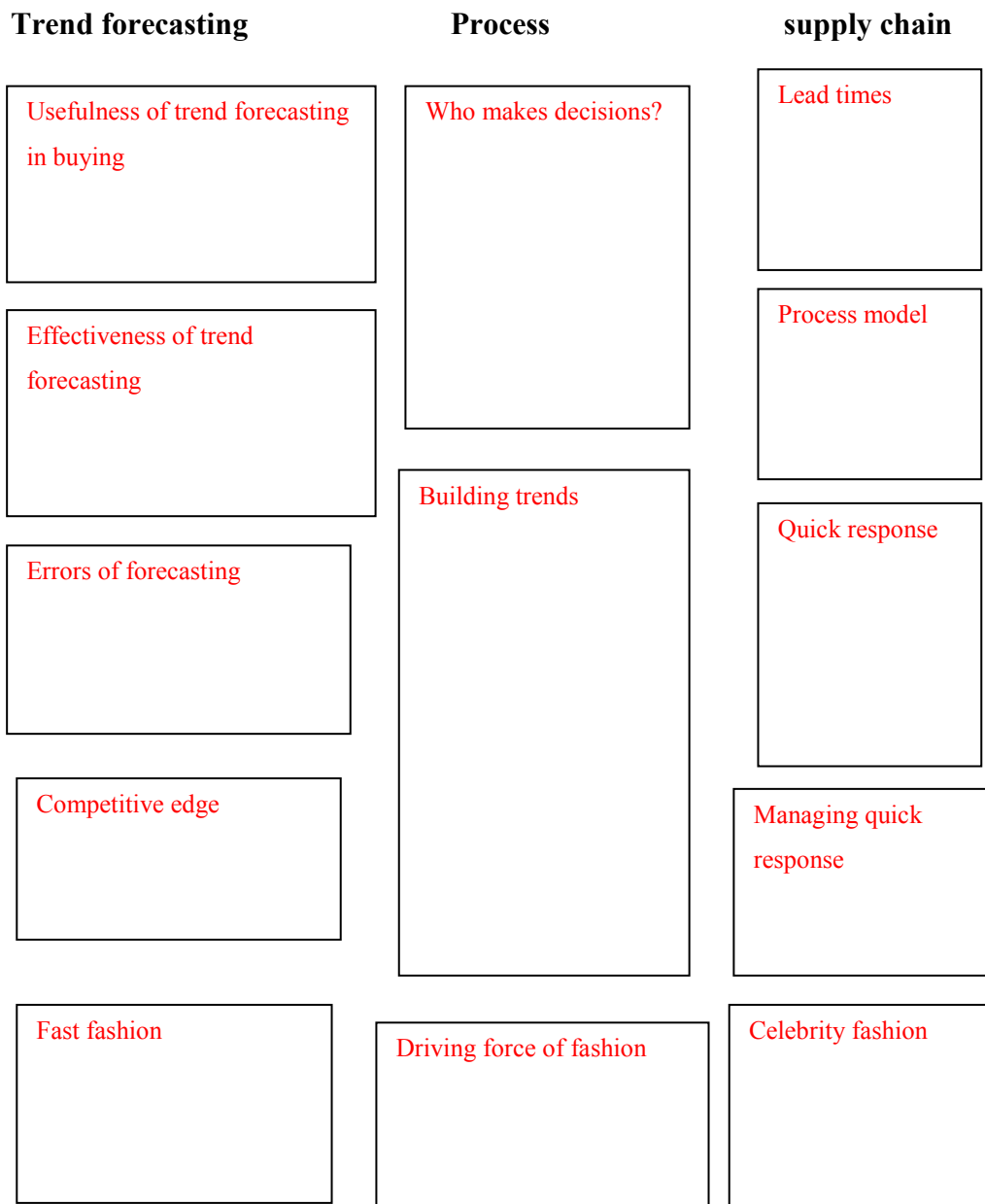
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## APPENDIX AA: Process map for interview data

Information taken from Interview with:.....

The usefulness of trend forecasting in buying

Process of Decision making / building of trends / Supply chain Process model



## APPENDIX AB: Process map - Literature themes - Seasonal fashion

Information taken from literature review on: The usefulness of trend forecasting in buying for Seasonal fashion

Process of decision making / Building of trends / Supply chain / Process model

### Trend forecasting

**Usefulness of trend forecasting in buying**  
Forecasters analysing and anticipating shifts in culture and fashion change allows companies to fine tune their marketing to take advantage of these opportunities (Brannon 2011).

**Effectiveness of trend forecasting**  
Brannon (2011) observed fashion forecasting is a resource for product development, merchandising, marketing and retailing executives. Trend forecasting helps these executives interpret fashion change by relating new directions to brand or store strategy.

**Errors of forecasting**  
Tyler *et al.* (2006) discussed the lengthy product development timetable locking retailers into a situation where responsiveness to demand is very limited. Forecasting is the only option for decision –makers as there is low potential to follow fashion trends. Decisions based on the forecast demand thus, become a block to flexibility.

### Process

**Decisions**  
Segments in the fashion industry synthesize information into colour and textile themes that reflect the ‘spirit of the times’. These forecasts are used in the supply chains for the product development process (Brannon 2011).

**Building trends**  
Members of the product development teams’ merchandisers, marketers and retailers participate in events and read the trade press to gather trend information (Brannon 2011). The fashion process begins with the right materials. Fibre and fabric producers make decisions daily to participate in the forecasting process. Everything begins in the primary market. The secondary market refers to the manufacturers, the link between the textile world and the retailers. The manufacturer blends creative design skills with hard edged technology to bring the garment to life (Perna 1987).

**Driving force**  
Jackson and Shaw (2009) believed that the effect of globalisation on fashion, marketing and trend forecasting, touching on lifestyle and the availability of mass media has raised consumer expectations.

**Competitive edge**  
Fashion responds to the ‘spirit of the times’, the problem with this is there is little advance warning of potential fashion trends and styles (Brannon 2011).

### Supply chain

**Lead times**  
The cycle takes 18-24 months from fibre to fashion or one year from textile development to actual purchase, or six months from order placement by the buyer to usage by the consumer (Perna 1987).

**Process model**  
The first stage in any range planning is to analyse what has happened in previous seasons to enable more informed decision making to capitalise on previous success. The retail buying experience will be built around improvements, revisions to existing product lines and the incorporation of new products (Easey 2003). The buyers, in-house designers and fashion forecasters are the key personnel discussing trend research. Strategy meetings are held throughout the season to discuss trends and key garments. Trend research in the buying office follows a similar format to that of the retailer and the manufacturing level (Perna 1987).



## APPENDIX AC: Process map - Literature themes - Seasonal fashion

Information taken from literature review on: The usefulness of trend forecasting in buying for fast fashion

Process of decision making / Building of trends / Supply chain / Process model

### Trend forecasting

#### Usefulness of trend forecasting in buying

Hines and Bruce (2007) observed traditionally change has been by seasons but the fast fashion phenomenon has made biannual seasons an irrelevance for some brands as new fashion stories are refreshed monthly.

#### Effectiveness of trend forecasting

#### Competitive edge

Brannon (2011) reported competing close to season means creating a relentless flow of innovations. The goal is in the acceptance of constant change, where strategies emerge through anticipation and improvisation.

#### Fast fashion

Mintel (2002) in Bruce stated fast fashion does not apply to the whole range in stores, and as much as 80% of goods may be core lines, with fast fashion accounting for 20%. However, the increasing demand for fast fashion has resulted in designers using the future trends for existing collections (Hines and Bruce 2007).

Fast fashion is a business strategy which aims to reduce the processes involved in the buying cycle and lead times for getting new fashion product into stores, in order to satisfy consumer its peak (Barnes and Lea-Greenwood 2006).

#### Celebrity fashion

Jackson and Shaw (2009:164) observed 'The increasing social importance and visibility of celebrities has resulted in their dress style and fashion sense being keenly watched and analysed by an increasingly interested public.'

### Process

#### Decisions

Brannon (2011) noted forecasting has become more collaborative between merchandisers and retailers.

#### Building trends

Sometimes trend forecasting services are part of a buying office, others are independent forecasting agencies, whose role it is to scout the market and make merchandise recommendations to stores and chains. The primary focus of a service is on developing seasonal trend forecasting reports (Brannon 2011).

#### Process model

Tucker and Jones (2002) question within fast fashion, whether long established suppliers are able to provide a time –compressed service in a tight budget. Suppliers are investing in design capabilities while buyers have to switch supply to local suppliers for rapid innovation into the market which may involve buying weekly. Flexibility is critical in fast fashion to ensure rapid replenishment (Bruce and Daly 2006).

#### Driving force

Barnes and Lea-Greenwood (2006) explained that changes in consumer lifestyles and constant demand for newness have exerted pressure on the established supply chain format.

### Supply chain

#### Lead times

Waddell (2006) explained that companies such as Zara, H&M and Next shorten the cycle using 'just in time' systems.

Hayes and Jones (2006) state the retailer renowned for a fast fashion strategy is Zara and case studies show on a lead time of 15 days or less.

Case studies on other retailers show that the retailers Mango and H&M have reduced their minimum lead times down to approximately three weeks (Reda 2003, Saini and Tyle 2005, O'Andrea and Arnold 2002).

Since Zara entered the UK and began directly competing with Topshop, Topshop have decreased their lead times from approximately nine weeks to six (White 2004).

#### Quick response

Birtwistle (2003) stated quick response is not just about products moving from the design stage to the stores, it is about being keenly responsive to customer' needs. This is where Zara is leaping ahead of the competition in satisfying consumer desire for fashion every day.

#### Managing quick response

Brannon (2000:323) observed fashion as a 'mass of intricately interlocking subsystems, just barely on the edge of criticality, with avalanches of all sizes rippling through and re-arranging things. Such a system is always poised on the edge - just as the fashion system is always poised on the edge of change.'

Brannon (2011) recognised that decision makers are dealing with a difficult system to analyse for close to season fashion. The traditional models do not provide the information required to make real-time decisions, given the risk and uncertainty because they leave out the most important variables; social, psychological and political factors.

