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**OF TRADITION AND CREATION:
THE DISCOURSE OF FASHION DESIGNERS ON TREND REPORT USAGE**

Amanda Queiroz Campos

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THE DISCOURSE OF FASHION DESIGNERS ON TREND REPORT USAGE**

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Supervisors: Prof. Dr. Luiz Salomão Ribas Gomez (UFSC)
Prof. Dr. Brigitte Wolf (BUW)

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With my eyes turned to the past, I walk backwards into the future.

Yohji Yamamoto

ABSTRACT

The present Ph.D. dissertation has as its axis analyzing the role of fashion trend forecasting companies – *bureaux de style* – in the current fashion system. It deals with the immaterial agency of fashion designers investing on interdisciplinary methods. To accomplish its objectives, this research adopted a qualitative approach of both exploratory and explanatory nature. Therefore, it seeks to understand not only the factors and motivations for the current connotation of the *bureaux de style*, but also the willingness and interest of fashion companies to acquire, review, and apply—or not—the fashion trend information on products that they design. Data collected by means of theoretical, documentary, and field research (interviews) were analyzed based on Critical Realism, Giddens' perspective on *structure* and *agency*, and Grounded Theory, from Glaser and Strauss. The duality “insecurity and dependence” seems to be highly expressive of the relationship between *bureaux de style* and fashion designers. Moreover, the entrusted dependency refers to the successful past of security, while insecurity is expressed in relation to the future, more specifically to its unfamiliarity and ignorance. Despite the high subscription rates to trend reports from *bureaux de style*, a discourse based on the “uselessness” of fashion trend reports is pervasive. On the other hand, the way fashion designers deal with the information conveyed by the *bureaux de style* consists of usage. The research resulted in the development of a model of levels of fashion trend report usage by fashion designers that expresses how designers respond to fashion trend information.

Keywords: Fashion trends. *Bureaux de style*. Fashion Design. Expertise.

ZUSAMMENFASSUNG

Die vorliegende Dissertation betrifft die Analyse der Rolle der Unternehmen, die sich im Bereich von Modetrends-Vorhersage beschäftigen, nämlich, die sogenannte *Bureaux de style* im aktuellen Modesystem. Zu diesem Zweck wurde in dieser Forschung ein qualitativer Ansatz sowie eine sowohl explorative als auch erklärende Natur ausgewählt. Aus diesem Grund fokussiert sie sich nicht nur auf die Faktoren und die Beweggründe für die aktuelle Konnotation der *Bureaux de Style*, sondern auch auf die Bereitschaft und das Interesse der Modeunternehmen, die Modetrend-Informationen über Produkte zu erwerben, zu überprüfen und anzuwenden – oder nicht anzuwenden. Die Daten wurden durch theoretische, dokumentarische und Feldforschung (Interviews) gesammelt und auf der Grundlage des Kritischen Realismus, der Giddens' Perspektive auf Struktur und Agentur und der Grounded Theory von Glaser und Strauss analysiert. Die Dualität "Unsicherheit und Abhängigkeit" erscheint in hohem Maße als Beziehung zwischen *Bureaux de Style* und Modedesignern. Die anvertraute Abhängigkeit beschäftigt sich darüber hinaus mit einer in der Vergangenheit erfolgreichen Sicherheit, während die Unsicherheit in Bezug auf die Zukunft, insbesondere auf ihre Unvertrautheit und Unwissenheit, ausgedrückt wird. Trotz der hohen Aboquoten von Trendberichten seitens *Bureaux de Style* wird ein Diskurs, der auf der "Nutzlosigkeit" von Modetrendberichten basiert, verbreitet. Die Art und Weise, mit deren Hilfe die Modedesigner mit den von den *Bureaux de Style* vermittelten Informationen umgehen, besteht andererseits aus der Nutzung. Die Forschung führte zur Entwicklung eines Modells, dessen Inhalt die von Modedesignern eingesetzten Ebenen für Modetrendberichte ist und ausdrückt weiterhin, wie Designer auf Informationen bezüglich des Modetrends reagieren.

Stichwörter: Modetrends. *Bureaux de Style*. Mode-Design. Expertise.

RESUMO

A presente tese de doutorado tem como mote a análise do papel das empresas de prospecção de tendências de moda – *bureaux de style* – no sistema de moda contemporâneo. Lida, portanto, com a agência imateria de designers de moda a partir de métodos interdisciplinares. A fim de atingir seus objetivos, a abordagem foi qualitativa e a natureza tanto exploratória quanto explicativa. Assim, buscou-se compreender não apenas os fatores e as motivações para a atual conotação dos *bureaux de style*, mas também a disposição e o interesse das empresas de moda em adquirir, revisar e aplicar – ou não – a informação de tendências nos produtos que projetam. Os dados foram coletados por meio de pesquisa teórica, pesquisa documental e pesquisa de campo (entrevistas) e foram analisados com base no Realismo Crítico, na perspectiva giddesiana sobre estrutura e agência e na Teoria Fundamentada nos Dados, de Glaser e Strauss. A dualidade "insegurança e dependência" parece ser altamente expressiva da relação entre os *bureaux de style* e os designers de moda. Além disso, a dependência confiada faz referência a uma segurança bem-sucedida no passado, enquanto a insegurança é expressa em relação ao futuro – mais especificamente à sua ignorância. Apesar dos altos níveis de assinatura de relatórios de tendências de *bureaux de style* por empresas de moda, um discurso baseado na "inutilidade" dos relatórios de tendências da moda é difundido. Por outro lado, a forma como os designers de moda lidam com as informações transmitidas pelos *bureaux de style* consiste, sim, em uso. A pesquisa levou ao desenvolvimento de um modelo de níveis de uso de relatórios de tendência de moda por designers de moda, o qual expressa como os designers respondem às informações de tendência de moda.

Palavras chave: Tendências de moda. *Bureaux de style*. Design de Moda. Expertise.

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1. INTRODUCTION

The present doctoral dissertation addresses the *bureaux de style* in the contemporary fashion system. In this work, *bureaux de style* refers to all fashion trend forecasting companies, despite size, location and information output media. The *bureaux de style* analyzed in this work were WGSN, Peclers, Promostyl, Carlin, Trend Union, Trends Top, DMI, Use Fashion and View Magazine. Since the dissertation was developed in a binational modality between the Universidade Federal de Santa Catarina, in Brazil, and the Bergische Universität Wuppertal, in Germany, under the supervision of Prof. Dr. Luiz Salomão Ribas Gomez and of Prof. Dr. Brigitte Wolf, the research was conducted in the Brazilian and German fashion scenarios.

As expressed in its title – *Of tradition and creation* –, the dissertation investigates how trend reports from *bureaux de style* are mechanisms enjoyed for the development of new fashion products. That is, creation is reasoned on reports developed by companies that claim be traditional. The subtitle – the discourse of fashion designers on trend report usage –, in its turn, problematizes the narrative undertaken by fashion designers about the manner with which they relate to the trend reports edited by experts from *bureaux de style*. This dissertation comprises five chapters; each of them aims to analyze and problematize particular aspects of the many facets that involve the potency and the agency of fashion trend report usage.

Tradition and creation express two faces of a same coin. Creation is inexistent without memory. Likewise, fashion trend research aims to announce future times and the announcement of a future cannot be done deprived of images of the past. To do so, I have chosen the mythologic figure of the Roman god Janus as an emblematic figure for this dissertation. Janus (from the Latin *Janus* ou *Ianus*) presides over all that opens or closes. He is the tutelary deity of beginnings (*principium*), movement and transitions (*eundo*). He rules all that concludes and all that returns, announces the start as well as the end. In the calendar organized by Ovid, January – *Ianuarius*, derived from Janus – was the month responsible for opening each new year.

The Roman god solemnized existence, assuring the absolute termination of what had already passed; the closing of one door and the opening of another. Future and past in the facets of the same god: a god that represented dualism itself. He had the power to conjugate the past and the future. Janus sets boundaries and was often represented holding a key in the right hand. The key symbolized the opening and closure of doors: to traverse a gateway. It symbolizes the change of condition. Janus is the protective authority of inputs and outputs; guarding the doors of houses and cities, and of the gates of heaven – where he shares the company of Hours - *Horae*.

The Romans believed that when Janus manifested himself during a war, it was to announce the “beginning of its end”. Similarly, when a fashion trend announces itself, it marks the “beginning of its end”. The fashion trend is doomed to perish; it announces its own finitude. The dynamic of trends, which are the engines of fashion dynamics, deals with the same issues as Janus: beginnings and ends.

The future remains central to the concerns of the so-called modern man. Contemporary society understands the future, mostly, by its programming ability. The incitement of competition, of the speed of technological change and the demand of consumers (Penn, 2008) requires organizations' agility, productivity and quality in providing products and services that are consistent with the qualities of the market in which they are inserted. There seems to be a consensus, particularly at the marketing level, that the more we are prepared and programmed to act on future realities, the more likely we are to succeed. One of the key features of our collectivity is to design the future; and innovation is closely related to that.

Trends emphasize transformations, and their research consists of mapping, discovery and getting to know collective preferences in order to provide guidance to companies focusing on delineating plans of action based on future knowledge. Trend researchers argue that the determination of strategies should not be an intuitive action; conversely, it requires planning and advancing so that the actions are effective (Paladini, 2009), supported by previous knowledge of the circumstances that may influence choices. Design Management involves leading a company driven by design in a structured and planned manner, since there are goals to achieve with efficiency, effectiveness and customer satisfaction. Therefore, knowledge of trends is relevant in such circumstances (Gimeno, 2000; Mozota, 2011).

Business managers generally use the term *design management* for an approach of problem solving that aims to enhance design, concept and form (information). This represents the insertion of a design culture in the company (Owen, 2004; Wolf, 1998; Martins, 2004). Within this context, design management assumes crucial importance. Meanwhile, the conception of strategic design dictates that design, through planning and actions, contributes in several ways to the company's success: among many, differentiation from competitors and satisfaction of consumers' desires, which are highly-valued contributors to the construction of a brand's image within the market (Wolf, op. cit.).

Facing the instabilities of the contemporary fashion market, characterized by market demand uncertainty and short product life cycles (Kim, 2013), there are coordinated action mechanisms that organize information on future market qualities, identifying in advance what trends will be effective (Erner, 2005). Specifically in fashion, this coordination dates from the 1960s and is intended to create a correspondence between supply and demand throughout the long production chain.

Systematically or not, the fashion business and fashion studies show an interest in prospecting trends that indicate what is happening, and anticipate what will influence society's of tastes and behavior. Such knowledge influences production of garments and other apparel items, which are colloquially entitled fashion products.

Regarding this matter, there are different interests that, directly or indirectly, result in financial profit. In the current market, this interest is so strong that scholars

discuss whether the fashion system and media reveal or invent and impose fashion trends (Erner, op. cit; Baldini, 2005; Godart, 2010; Svendsen, 2011; Kawamura, 2014).

The influences observed, analyzed and edited by trend researchers function as a sort of mirror of the market's future. Thus, trends communicated by such expertise are formal compilations of the spirit of the time (*Zeitgeist*) applied to the visuality and materiality of fashion, by the proposal of colors, shapes and textures among other perceptible qualities. Trend forecasting agencies (*bureaux de style*) are responsible for investigating future trends, anticipating them for the industry. However, those directions rarely – never – elucidate where they came from or what they signal sociologically. Such presentations create a sort of dependency on experts, since they seem to work mysteriously, rely on confidential methodologies, and have a natural instinct to “sense” fashion trends.

One may notice this in key figures and personalities of expertise, such as trend guru Li Edelkoort, who is highly influential and has truly become an opinion leader. The most influential companies are the Parisian Peclers, founded in 1970, Nelly Rodi, founded in 1985, and the currently market-leader, the English WGSN (World Global Style Network), founded in 1998. In Brazil, the company UseFashion leads research services and information to the fashion market on local and global levels. In Germany, institutions such as DMI (Deutsche Mode Institut) and Textilwirtschaft provide the most-used prognoses on fashion trends.

Fashion professionals invest millions of dollars every year to keep brands in tune with trends, using them as artifices for market expansion. Similarly, specialized companies dedicated to trend prospection and information reach high turnovers. WGSN (World Global Style Network) charged annuities starting from US\$ 12,000 to provide a password for a sole user. The growing revenue of the company led media to consider fashion trend forecasting as “the new £36 billion growth business.” (Barnett *apud* Petermann, 2014). These values indicate the high costs that the market is willing to pay for information related to fashion trends.

The different coordination mechanisms indicate that the diffusion of styles and trends in fashion is characterized "by the existence of a collective team that leads fashion professionals to select trends due to a taste developed in contact with their peers or sources information" (Godart, op. cit., p.75), which characterizes an endogenous force. Other theories, such as *Zeitgeist* (Barthes, 2009a; Caldas, 2004), and the theory of *simulacrum* (Baudrillard, 1995) address exogenous forces driving the changes in fashion. A mature view of the phenomenon infers a combined strategy. That is, just as any industry, fashion aims for profit and invests in the symbolic obsolescence of products stimulating the renovation of taste. The parameters for change or novelty “canons” are, however, based on consumer behavior, i.e., exogenous forces.

Fashion trend research companies, on the edge of the fashion supply chain, communicate filtered and edited trends in the form of product aesthetic product directions (Godart, op. cit.; Skov & Aspers, 2006). Throughout time, they have established

themselves as experts – here treated as expert systems, in corroboration with the taxonomy of Anthony Giddens (1991; 2012). Their legitimacy relies both on (1) a mystery of how they proceed, their abilities and knowledge; and (2) on a discourse that tackles the fear and insecurity of an unknown future.

Barthes (2009b) dealt with matters of the fashion system's semiology through a structural analysis of verbal discourse in fashion periodicals, in which he found the recurrence of categorical imperatives and the condition of magazines as oracles. He thus elucidated the centrality of information in communicative processes within the scope of the fashion market. Among other things, the present study intends to unveil specific characteristics among these large communicators of trend information, such as Peclers, WGSN, UseFashion, Promostyl and Nelly Rodi.

Not coincidentally, the so-called *bureaux de style*, fashion trend forecasting companies, were first founded by fashion magazine editors in the 1960s, a period in which the fashion market was completely remodeled to practices known as ready-to-wear and *prêt-à-porter*. The need to organize demand and supply all the way through the fashion industry, from yarns to retail, required a formalization of the industrial productive model. In such a context, style coordinators were the main expert system that would centralize fashion trend information in order to coordinate supply and demand of mass-produced items.

Currently, in the fashion market, supplementation logic (Svendsen, op. cit.) seems to triumph, i.e., all trends become more or less contemporary to another and are eternally recyclable in a period characterized by an extreme pluralism. Also, in the face of twenty-first-century industry flexibility, with which production anticipation has dropped from a year to just weeks, and with related information promoted via the internet (especially on blogs and Instagram), it seems contradictory that fashion companies still invest so much money in restricted access trend information, trying to decipher the future market.

Many of the interviewees who contributed to this Ph.D. dissertation affirmed that they and their colleagues use little or none of what the *bureaux de style* propose. They seem to be more influenced by commercial factors – currently expressed by solid sales data analysis – and the brands' positioning and heritage. However, the majority of companies still purchases and subscribes to fashion trend reports. That could only suggest that they do consider the *bureaux de style* as important and as legitimate service providers. If they are mostly unused – and therefore, by extension, useless - how does forecasting expertise sustain such popularity?

The present study focuses on *bureaux de style* as contemporary centralizing experts of “traditional” – since the middle of the 20th century – expertise in the judgment of taste, the evaluation of fashion products, and the delimitation of *what is in* and *what is out*. More specifically, it examines the relationship of these *bureaux de style* with other links of the fashion production chain – particularly fashion designers. It demonstrates the

various manners by which designers employ – or do not employ – the information available in fashion trend reports, books and portals.

1.1 OBJECTIVES

According to Friedman (2003, p.1), design is a matter of solving problems, creating the new or altering current circumstances and states to more desirable ones. Design has become a broad discipline, which encompasses processes, interfaces and artifacts, with clothing one of the many possible. Conducting design research consists in comprehending “how things work and why,” since it involves analysis and explanation, and can lead to the construction of a theory (ibid). Among other things, studies in the field of design focus on understanding “the immaterial side of design’s agency” (Petermann, op. cit., p.2; Tonkinwise, 2014).

Therefore, the **main purpose** of this research is to analyze the role of fashion trend forecasting companies – *bureaux de style* – in the current fashion system from the perspective of fashion designers in Brazil and in Germany. This analysis provided substrate for the development of a model of levels of fashion trend report usage by fashion designers, expressive of how designers respond to fashion trend information, as main result of these studies. In order to accomplish the main purpose, the work followed the subsequent **specific goals**:

[1] to present fashion as an institutionalized system, its particular configuration and timing, design processes and support services;

[2] to theoretically and conceptually problematize fashion trends and their dynamics;

[3] to theoretically and historically understand expert systems in fashion – more specifically, in the setting of fashion canons;

[4] to identify relevant *bureaux de style* considering their consecrated expertise and relevance in the international fashion market, and identify their information modalities and strategies;

[5] to identify the level of trend adoption of fashion design companies in Brazil and in Germany through documentary research and empiric research (semi-structured interviews);

[6] to identify the role of fashion trend forecasting companies – *bureaux de style* – in the current fashion supply chain.

1.2 METHODOLOGY

This research has a qualitative approach, as it gives priority to deepening the understanding of the context of transmission, acceptance and implementation of trends in fashion design activities. It aimed to identify the motivations for the purchase of fashion trend reports, and the application or non-application of their contents to fashion products. Similarly, it concerned the scope of this research to identify the symbolic

exchanges - represented by the information on fashion trends - between the fashion system institutions (*bureaux de style* and fashion designers). The work also intended to understand the motivations and implications that lead fashion companies to proceed the way they do.

This research's nature was explanatory, for it tried to understand the role played by fashion forecasting companies in the current fashion system setting. Such analyses were intended to address the degree of adoption of these trends by renowned fashion designers and companies in Brazil and in Germany. Regarding the objectives, this research is also exploratory. Therefore, it sought to understand not only the factors and motivations for the current connotation of the *bureaux de style*, but also the willingness and interest of fashion companies to acquire, review and apply - or not apply - fashion trends information on products that they design.

For this purpose, a systematic theoretical foundation was used, and applied research in the form of documentary and field research through interviews was conducted. The systematic theoretical foundation had as its goal to increase the accuracy and integrity of the results, since it will serve as a support for the presentation, interpretation and analysis of the object of study of this dissertation. The review of literature included the appraisal of books, papers, theses and dissertations on topics pertaining to this research.

The first stage of theoretical foundation targeted the presentation of the fashion system and the fashion product operating logic (chapter 2). Secondly, an investigation of the concept, history, nature, dynamics and diffusion logic of trends, specifically of fashion trends, occurred, since this theory directly addresses the central object of this dissertation (chapter 3). The third part of the theoretical review involved studies about expertise and legitimation, presenting the concept of expert system by Giddens (1991), and a history of expertise in judging taste and trends in fashion (chapter 4).

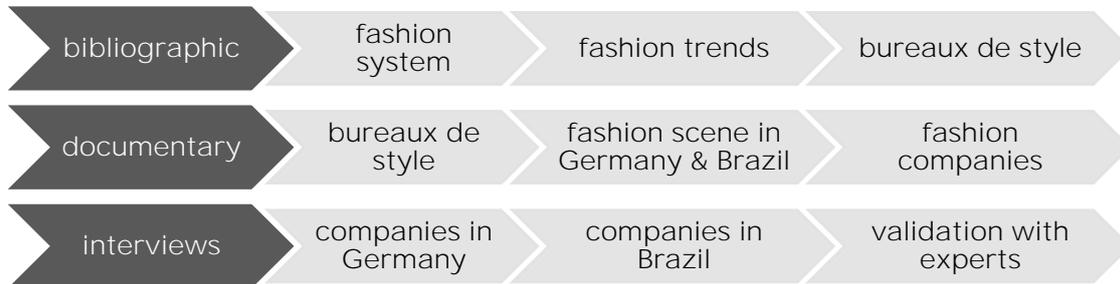
Each theoretical foundation phase aimed to consolidate the thesis as a whole and, likewise, serve as a reference to support the documentary and empiric analysis and interpretation. Thus, the central chapters (chapters 2-5) intends to create a concise compound of knowledge that was significant for the conception and the development of the dissertation. At the same time, this knowledge evolved during the research; since the partial results of applied documentary research and field research also served as a subsidy for the collection and deepening of the fundamental theoretical concepts. Therefore, further bibliographic reference on path dependency, risk, security and fear sustained the interview interpretation and the results of the study - proposed as a model of fashion trend report usage by fashion designers.

The applied research stage of the research comprised both documentary and field research. The documentary research collected data on *bureaux de style* and the informational strategies they apply to communicate the conveyed fashion trends and their established expertise. This stage involved collecting imagery and textual material on the websites of the trend research companies and from their trend reports. The analysis

occurred by means of comparative procedures (Morlino & Sartori 1994; Sartori, 1991; Durkheim, 2004); identifying similarities in the ways *bureaux de style* convey information of fashion trends and communicate their expertise. Further documentary research gathered data from the collections developed by the interviewed fashion companies and the trends for the respective fashion season of the collections. Images from lookbooks, campaigns and websites of the 24 companies for two seasons were retrieved. Likewise, the same seasons' fashion trends were collected from highly renewed fashion magazines. In addition, data on the companies' institutional status and background was collected, which aided the interview preparation and analysis.

Interviews were conducted both in Germany and in Brazil, following similar processes. They were semi-structured; since different designers and product managers influenced the standard interview script, just as previously conducted interviews did. The theoretical foundation and exploratory interviews conducted with fashion professors served as a base for the preliminary general interview script. The adaptation of this script derived from documentary research on the company and the designer, conducted prior to the interview. Sample selection for interview occurred in an opportunistic way, after listing and attempting to contact the various fashion companies. Twenty five designers/directors were interviewed for this investigation. The various steps of investigation that were applied in this study are more or less synthetized in Chart 1:

Figure 1: Summary of methodological procedures



Source: author

Critical Realism is one of the approaches upon which this research is based. It is the stratified ontology of reality that considers the dissonance between potential and actual actions and domains. This theory has references in another foundation of this investigation, namely Giddens's perspective on *structure* and *agency*, and allows for a reflection on the knowledge of a given structure and the consequences of the agents' actions.

Another important research approach, generally used for data collection and analysis, was Grounded Theory. Proposed initially by Glaser and Strauss, in 1967, this methodology has as its main characteristics [1] the systematization of data collection and analysis (as alternating processes), and [2] an emphasis on developing hypotheses from data, as its name suggests (Soneira, 2007). Data collection is therefore iterative and results from the analysis of collected previously data. Collection ceases when an

explanatory theory can be proposed. The theory and some of its categories were selected to the development of the model of levels of fashion trend report usage, proposed as a result of the doctoral dissertation.

1.3 STRUCTURE OF DISSERTATION

The second chapter introduces the fashion system, understood by Kawamura (op. cit.) as the sets of fashion production, development and communication. The view of fashion as an institution covers, more than the garment production steps and actors, the stages where the concept and the practice of fashion take place, such as the fashion press, advertisement, branding and retail. The chapter, therefore, is dedicated to presenting the general organization of the fashion business, focusing on how the subjects of this dissertation – fashion trend forecasting companies, *bureaux de style* – interact with and affect the different stages of the industrial and conceptual production of fashionable goods.

In the third chapter, the etymology of the term *trend* was developed in order to understand its origin and the changes undergone in its connotation throughout history. It also exposed the wide range of specific taxonomies within the semantic scope of the word *trend*, among them: *trend, wave, fashion, fad, megatrend, short- or long-term trend*, etc. The variety of terms culminated in the proposition of maintaining only two categories: *macro* and *micro trends*. The chapter displays the dynamics of trends, addressing the concepts of *convergence, synchrony* and *diachrony*, as well as the different models of diffusion of fashion trends, presenting the well-known ones – trickle down model, inverted pyramid and contagion – and bringing new perspectives with special impact to this work.

The fourth chapter addresses the subject of this dissertation – the *bureaux de style* – more directly. First to be discussed is Giddens's perspective on modernity and the disembedding of direct experience, whose vacuum was filled by expert institutions that occupy the voids of experience with meanings legitimized in the name of specialized scientific knowledge. With an emphasis on the fashion production and consumption system, one of the main types of expertise valued along the chain is the knowledge of fashion trends. This knowledge falls upon centralizing figures throughout the history of fashion and was institutionalized by the *bureaux de style* in the 1960s. The most recognized *bureaux de style* and their information modalities were presented and analyzed, questioning the faith placed in these agencies.

The fifth chapter comprises the *agency* of fashion company designers in relation to the fashion trend reports compiled by experts in fashion trend research, the *bureaux de style*. It presents the analysis and interpretation of interviews for the development of the results of the dissertation, which resulted in the systematization of seven levels of trend report usage by fashion designers. Nonetheless, results are not limited to the model, as the interpretation of data collected in Germany and in Brazil provided a

substantive outlook of the branch, which continues to subscribe to the services of *bureaux de style*.

Finally, the final considerations point to relevant questions about this doctoral dissertation, presenting the main contributions of this research and each of the chapters that compose it. In addition, it points to research opportunities to follow it. Furthermore, it provides an outlook on the most substantial issues of this investigation, i.e, the role of fashion trend research enterprises – *bureaux de style* - in the fashion scene both in Brazil and in Germany. More specifically, it involves the agency of fashion designers in relation to the traditionally legitimated *bureaux de style*, and with their compilations on future fashion trends, trend reports.

It is important to note at this time that the work here presented has not decisively followed the order of these pages. This work is part of a four-year doctoral trajectory, whose learning by far surpasses what I have been able to synthesize in this dissertation. The results of the specific doctoral research, however, are presented in the following chapters in the sequence in which I - as a researcher and writer - thought to be the most appropriate course for the understanding of the goals I have proposed for the research.

Therefore, we start from the broad context of fashion creation and the production and communication systems until we reach, in detail, the interaction between fashion designers from authorial houses and commercial brands, and fashion trend reports compiled by renowned *bureaux de style*. This trajectory allows for a knowledge of the concept of *fashion trend*, in addition to the expertise that was established based on its prognosis. I devoted myself to addressing these contents with dedication and care. So, I hope the journey will be as fruitful to readers as it has been to me.

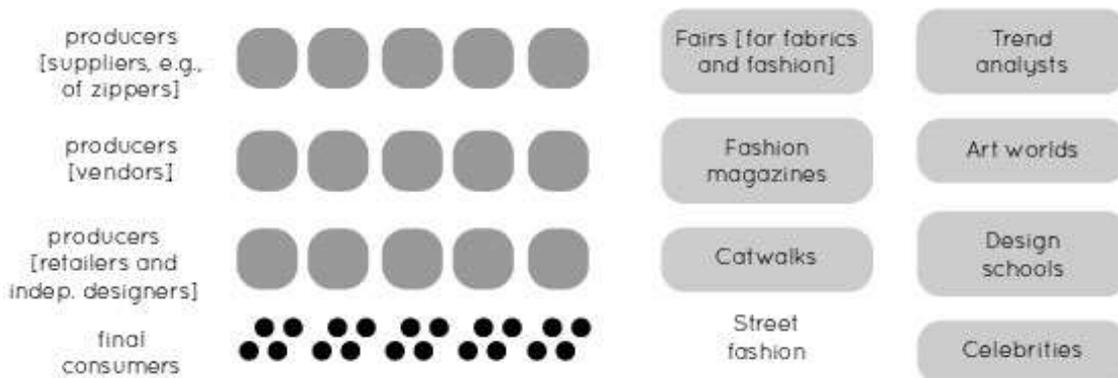
2. THE FASHION SYSTEM

It is difficult to separate fashion from clothing. As many authors and scholars have intended to show, not all clothes are fashion, and fashion as a phenomenon surpasses the boundaries of clothing and apparel. When referring to a fashion industry one tends to address the textile and clothing industries, although it is also possible to widen the spectra to other apparel-related areas, such as accessories and cosmetics. Some consider that fashion and clothing industries are more than producers of a piece of cloth, such as a suit. Kawamura (op. cit.) attests that it takes more than clothing to make fashion.

At times of high demand for clothing, fashion products may occupy the center of value. On the other hand, on most occasions fashion production involves the awakening of desire and the creation of symbolic value by experts from branding and marketing (Schüssler, 2008; Svendsen, op. cit.). If it was ever possible to say that brands and products depended on quality, nowadays the organization of the value-chain has acquired an almost symbolic character. The organization of value creation also needs legitimacy, which requires a cascade coordination of specific fashion concepts, discourses and trends throughout the industry.

Skov & Aspers (op. cit.) developed a study in order to understand fashion organization from a business perspective (Figure 2). To the authors, the global fashion business is divided in the following sectors: [1] production – material and conceptual –; [2] sales; and [3] consumption. The first level includes the productive work of fashion, both in the production of artifacts by labor in and outside of the industry, and in the production of a cognitive arsenal, which the authors call conceptual production.

Figure 2 Markets, Actors and Institutions of the Global Fashion Business¹



Source: *ibid.*, p.804

¹ Note: dotted lines indicate cultural institutions. At one end of the material production chain one finds the suppliers of input material for production of garments, such as fabrics and sewing machines. Final consumers populate the other end. One may of course divide this chain into many small links; all being important in their own right, and more could of course be said about the different markets. There are yet other actors that cannot be depicted here. Finally, the boundaries can be drawn quite differently between actors and various activities" (*ibid.*, p.804).

The Scandinavian authors consider – although broadly – the performance of conceptual fashion producers in various actions, and they reinforce the use of the plural form – producers – as a demonstrative effort to acknowledge the existence of a wide range of expertise throughout the fashion system. Accordingly, within the current boundaries of a globalized fashion system, fashion production cannot be reduced to a single trader (ibid.). The idea of multiple expertise bespeaks the relevant transformation that separates the fashion market from the artist-craftsman-tailor logic (Riello, 2013), towards a systemic structure that includes different levels and figures. There are different managers, department directors, buyers, trendsetters, marketing divisions, editors, visual merchandiser, brand managers, designers, advertisers, etc.

The fashion business, as proposed by Skov & Aspers (op. cit.), Riello (op. cit.) and Godart (op. cit.), is organized due to the flow of consumer goods produced through complex networks, concatenating the aforementioned value chain. The chain is a representation of the different steps of the production process of fashion goods, which considers the addition of value to the end product at every stage of its transformation, as the name suggests. The productive fashion chain comprises steps of industrial production – such as the production of fibers and yarns, textile, cutting, sewing and finishing – and steps of creative and commercial production – consisting of research, creation, distribution, retail, brand management and design. The idea of a chain considers the concatenation of links, each of which is specialized for the work performed, but dependent upon the performance of the other links, forming a complex and articulated network.

The assignment of value – which makes a clothing item into a fashionable product – engages authority and recognition: authority of the person or brand intending to set a trend, and the recognition of others of what this figure represents (Corner, 2014). This mediation process is often referred to as similar to the Emperor's New Clothes story, when one believes something is trendy or fashionable because a legitimated person or institution says so. Although we can easily find references to this occurrence in everyday life on a personal level, the industry also takes part in this game of influence, legitimacy and authority on operational, tactical and strategic levels.

The focus on symbolic value has forced a review of the outdated concept of the fashion industry as encompassing only the textile and garment industry, mostly because clothing and apparel products are exchange elements within the buy-sell processes of the fashion industry. Their greatest value consists in providing physical support for the imaginary concepts projected by fashion brands and the fashion system itself. The 1960s saw the development of industrial coordination in fashion, parallel to the flourishing of the field of design management, scheduling and controlling innovations and expressing them in products and services, creating interfaces between production and consumption. This type of coordination arose in the birth context of the industrial production of fashion goods. The possibility of producing apparel in large quantities led to advanced production. The idea of coordinating the fashion production chain propelled the

organization of the textile and apparel chain around a given calendar. This calendar is based on the advance knowledge, or speculation, of market demands and on the communication of product directions for the different levels of the product chain. Since the cycle would start 24 months prior to the commercialization of consumer goods – as this work will further detail – all the different players involved would chronologically respond to the information provided by coordinators.

Scholars of fashion design generally agree that the fashion industry encircles the design, manufacture, distribution, marketing, retail, advertisement and promotion of apparel, from *haute couture* to ordinary mass-focused, fast-fashion clothing (Čiarnienė & Vienažindienė, 2014). Crane (1997) and Kawamura (op. cit.) notably considers fashion as an institutionalized system. Such a view covers, more than the garment production steps and actors, the stages where the concept and the practice of fashion take place, such as the fashion-press, advertisement, branding and retail, in accordance to the systematization of Skov & Aspers (op. cit.).

Since this investigation endeavors empirically to study fashion as an institutionalized system, this specific chapter intends to present a general organization of the fashion business, focusing on how the subjects of this dissertation – the fashion trend forecasting companies, *bureaux de style* – interact and impact the different stages of the industrial and conceptual production of fashionable goods. The fashion system is

an institution or an institutionalized system in which individuals related to fashion, including designers among many other fashion professionals, engage activities collectively, share the same belief in fashion and participate together in producing and perpetuating not only the ideology of fashion but also the fashion culture which is sustained by the continuous production of fashion. (Kawamura, op. cit., p. 39)

Also regarding the definition of the fashion industry, it is worth mentioning the differences between the textile industry and the clothing industry, which are considered by, among others, Dopico & Porral (2012) and Schüssler (op. cit.). Even though the terms *textile industry* and *clothing industry* are usually used as synonyms, they refer to different industries. The textile industry produces and prepares fibers and yarns, and transforms them into threads and fabrics – woven or knit – and other finished textile products. The end product of the textile industry is the raw material, so to say, for the clothing or apparel industry, where the fabrics will be put to use in the manufacture of garments, in a process called assembly or production (Bierbaum, 1992 *apud* Schüssler, op. cit.).

Although connected, the two types of industry present diverse logics. Whereas the textile industry is capital-intensive, the clothing industry is more labor-intensive. The textile industry faces barriers in terms of investments in technology, innovation and the development of new material. On the other hand, in the clothing industry the access for those investments is eased (ibid; Dopico & Porral, op. cit.). Hines & McGowan (2005, p.522) define apparel manufacture as the processes of “cut the cloth, make it up, trim to a design template specified by the retail organization before finishing (packing, labelling, pricing) and delivering to a retail customer”.

Despite the fact that the term *textile industry* is used on an everyday basis to denote both the textile and the apparel industries, there are more frequent references to the term *fashion industry*, as adopted by the United States Fashion Industry Association, which will be adopted in this report when referencing the production of textiles and clothing. The term *fashion system* will be employed in a broader sense, to refer to the production, distribution and consumption of fashionable goods.

Although fashion encompasses production, distribution and consumption, this chapter will not directly approach fashion consumption, for the study's focus consists in the institutionalization of knowledge in the field of fashion as an industrial organization; more specifically, the role of experts in trend research, at the front of a new economy and new technologies that threaten to dramatically alter the area. In such a scope, despite the fact that this Ph.D. dissertation addresses a specific subject – the role of the *bureaux de style* –, it is necessary to consider the implications of the changing environment in which they act, in which they are legitimized, and to which they present their services.

Therefore, this chapter is divided into five sub-items, encompassing: [1] the industrial configuration of fashion, and the different processes of garment production; [2] the calendar, presenting the traditional and current important deadlines of the sector; [3] creation and design, where considerations on product development and creativity are presented; [4] the most referred to types of enterprises in fashion design; and [5] the various fashion information diffusion media, also named support industries or advance services in fashion, such as media, textile and fashion fairs, visual merchandising and retail and, finally, the main object of this Ph.D. dissertation, *bureaux de style*.

2.1 CONFIGURATION

Of any industry, fashion has the greatest range of stages involved in the making of its products. Its supply chain is long and convoluted, often involving travel between factories and countries, contractors and subcontractors. Partly because of this complexity, fashion has a greater range of mark-ups than any other industry (Corner, op. cit., p.15).

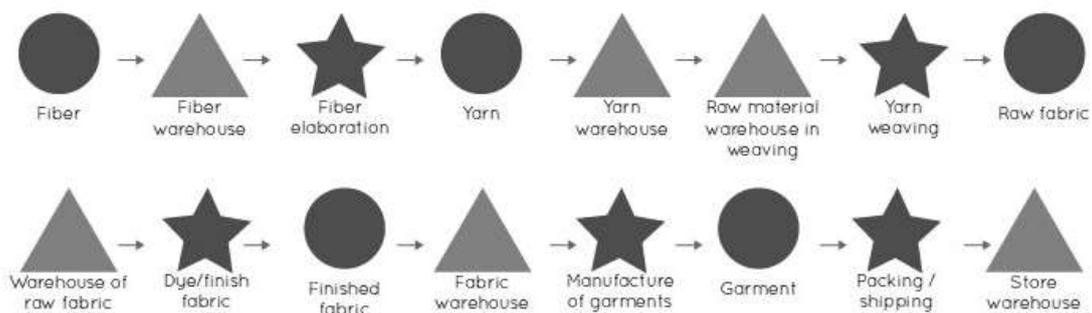
Although fashion products are ordinarily associated with what is on the market and publicized by the specialized media, they are affected by a sequence of direct and indirect processes, which involve stages and actors at different times, which will interfere in the success or failure of the product (Saviolo & Testa, 2015). A supply chain consists of all activities that must be performed in order to create value, ranging from the search for materials to the transformation of inputs into products, and to the delivery of products to consumers (Kim, op. cit.). The fashion supply-chain comprises a set of processes that are linked up progressively, including raw materials, capital goods, intermediate goods, distribution and marketing. Each one of those processes has a variable importance when considering the added value to the product. Regardless of their significance, each link needs to be highly interconnected to the others for the efficiency of the process.

For the variety of products, technologies, materials and areas, the industry consists of an extensive network of supply relationships. The fashion sector, in point of fact, consists of a cluster of industries. Studying fashion's production sectors and models is crucial to understanding *extended enterprises*, i.e. the horizontal and vertical web of relationships between fashion companies and their suppliers (Saviolo & Testa, 2015). As mentioned before, the industry features relations with various fields such as the chemical industry, the instrumental metal industry, agriculture and farming. Besides other industrial supports for the fashion industry, one also needs to acknowledge the conceptual production of fashionable goods. Considering Skov & Aspers's (op. cit.) division of fashion's organization from a business perspective, the support or advance services operate as transversal influences along the various links of the fashion industrial chain. They will, therefore, be discussed in detail in a specific subchapter (2.4).

Considering that in the fashion business the material product remains existent as consumer goods, and sales, profit margin, income and revenue are calculated based on the commercialization of artifacts, this chapter will firstly approach the material production of the fashion industry. As mentioned before in this chapter, the symbolic value of fashion products and brands has become central and decisive to the success or failure of a product, collection or enterprise. However, one cannot ignore that the fashion industry remains the field of production and exchange of clothing items, manufactured by the textile and fashion industry.

The fashion industrial chain comprehends, therefore, the stages of product in production-transformation-distribution cycles, as well as interaction with other processes and suppliers, such as phases of raw material, industrial production of garments and distribution. Figure 3 represents the clothing value chain by showing cycle fluxes, distinguishing semi-finished and finished process products, with arrows; product storage activities, with triangles; and transformation activities, represented by a star sign.

Figure 3 Activity flow in the textile chain, towards the finished garment



Source: Adapted from Saviolo and Testa (op. cit., p.57)

As one may identify in the figure, the activities of the fashion industry sequentially produce fibers, threads and yarns, raw fabrics, finished fabrics and then the clothing items. The sequence of the industrial chain is commonly divided into three macro sectors. They are: [1] fibers and textiles; [2] apparel and assembly, and; [3] distribution (Dopico & Porral, op. cit). The term *macro sector* already highlights the possibility of detailing each

sector, for as one can notice, the separation does not encompass the depth and richness of different processes within each section.

The first macro sector [1] is the production of raw material. It involves the manufacture of fibers and yarns, which are then processed into woven or non-woven fabrics, textiles. The sector of textile fibers inserted in this first macro sector involves the production of these, which are the smallest components of fabrics and apparel. However, the quality of the processes and materials at this stage impacts directly on the aesthetic (haptic and visual) quality of the clothes. Some attributes given to fibers are color, weight, fastness, solidity and touch.

The fiber sector comprises both agriculture and farming as producers of the inputs for natural fibers – such as linen, cotton, wool and silk – and for manmade fibers, which transform natural raw materials with chemical reactions, producing, for example, viscose. The chemical industry develops both the products for the transformation of natural fibers and finishes, and synthetic fibers as a final product themselves. Such fibers are made by processes of extrusion of a liquid or semi-solid polymers. The most famous synthetic fibers are polyester, acrylic, polypropylene and spandex, also referred to as elastane.

Considering the structure of the industry from a competitive point of view, the fiber industry is much concentrated, analyzing the producers of chemicals and natural inputs. Saviolo and Testa (2015) consider that the industry applies a model of oligopolistic competition where a relatively restricted number of companies control the global makers. Many also consider the high market power of such producers, since by being at the top of the supply-chain, they have the power to influence the whole chain, by imposing their choices and innovations gradually downwards, until recognized brands suggest the product to the final consumer, with a guarantee of quality.

The second sector comprising the first macro sector is [2] textiles. This sector transforms fibers into yarns and fabrics. The sector can be further divided regarding the specific fibers used, varying from cotton, to silk, to non-fabrics and mixed-textiles. However, semi-elaborated textile procedures present common phases. The first phase consists of [a] fiber spinning, i.e., the transformation of fibers into yarns. A second phase implicates the [b] weaving of yarns, generating the fabrics. Fabric elaboration varies, among other specificities here unimportant, between woven, knit and non-woven. Considering its economic aspect, one may ponder that the textile industry also operates in what researchers call a *competence monopoly*, for despite the high number of textile producers, few of them present drastic innovation in product or service, which minimizes real competition. Exclusivity of a textile input, small batches and production at short notice takes on increasing importance in the textile industry, as permitted by technology and massive capital investment. Controlled by only a few large companies, it is easier for this sector to organize itself productively and associatively in the face of market trends (Zawislak, et al, 2000).

The stage of [c] finishing fulfills a series of processes in raw fabrics in order to prepare them for confection, assembly. Also known in many languages (such as in Spanish

and Italian) as ennoblement processes, they are: bleaching, dyeing, printing or other more specific procedures such as sanforizing², singeing³, raising⁴, calendering⁵, among others (Medeiros, n.d.). Although fabric finishing is mostly applied to fabrics, processes may occur in various stages of the fashion industry: in fibers, yarns and even finished clothing items. For this reason, it is presented as a transversal subsector in the chain (Saviolo & Testa, 2015).

The finishing or embellishment procedures add touch and visual properties to fabrics without interfering in the fabrics' nature or structure. Specific interventions require a high level of specialization from the industries, and such abilities are increasingly recognized in the fashion market. Such recognition reflects the considerable added value of applying one or more finishing processes to fabrics, and of the addition of novelties to different product categories by altering their color and surface (ibid.). The challenges of the finishing sector are similar to others of the textile macro sector, and involve the demand of high quality, short production time, personalization of the supply, and technological innovation in the form of intelligent fabrics.

Figure 4 summarizes the macro sector of fibers and textiles. It is interesting to notice the reference to the textile machinery that directly influences the steps of fiber spinning and weaving, knitting and non-weaving processes. The diagram also represents the three stages of possible haptic and visual finishing – fiber, yarn or textile finishing. Lastly, as *bureaux de style* are the subject of this dissertation, the industry of advanced services, which also comprises fashion fairs, technical schools, fashion journalism and other agencies, is represented as influencing the whole system.

The second macro sector of the fashion industry refers to [2] apparel and confection, or assembly. Also known as transformation industry, it corresponds to the final phases of the value chain. It is also the macro sector that adds the most value to the product, although its competitiveness is contingent on other sectors and parallel services. In English-speaking countries experts often refer to this sector as CMT – cut, make and trim (Dillon, 2012). There are two main technological, productive and market differences regarding the confection products, for they can englobe [a] cutting and sewing weave and knit fabrics or/and [b] confectioning apparel items directly through knitting. Since knitting characterizes a specific industry, the steps of industrial assembly of apparel by cutting and sewing will be given attention.

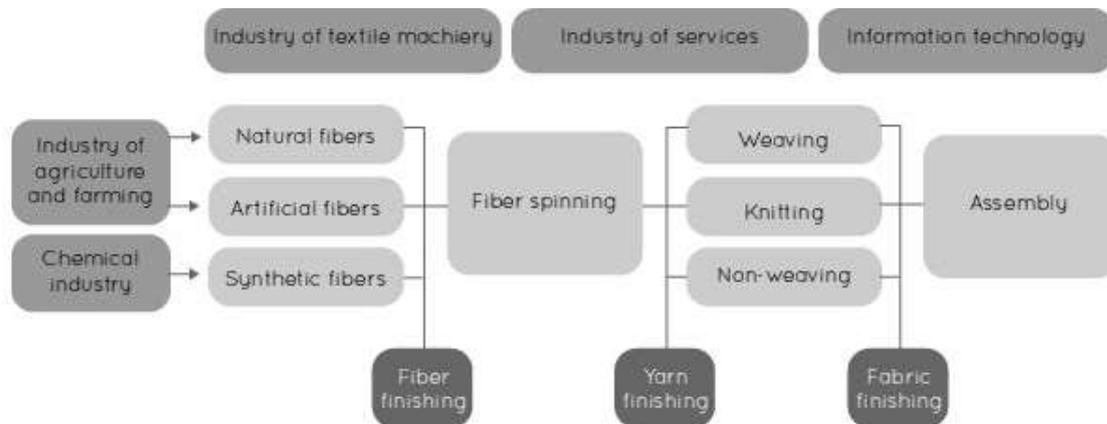
² Mechanical shrinking (sometimes referred to as sanforizing), whereby the fabric is forced to shrink width and/or lengthwise, creates a fabric in which any residual tendency to shrink after subsequent laundering is minimal.

³ Singeing is designed to burn off the surface fibers from the fabric to produce smoothness. The fabric passes over brushes to raise the fibers, then passes over a plate heated by gas flames.

⁴ Another finishing process is raising. During raising, the fabric surface is treated with sharp teeth to lift the surface fibers, thereby imparting hairiness, softness and warmth, as in flannelette.

⁵ Calendering is the third important mechanical process, in which the fabric is passed between heated rollers to generate smooth, polished or embossed effects depending on roller surface properties and relative speeds.

Figure 4 The textile chain



Source: From author, adapted from Saviolo & Testa (2015, p. 59)

As mentioned at the beginning of this chapter, the confection sector demands intense work because the majority of activities still involve the industrial version of the sewing machine and its manipulation by workers. Despite the remaining human input, the sector faces many technological and organizational transformations. One of the most notable and mentioned transitions is the relocation of production centers to countries of low-cost labor, such as the Asian countries China, Bangladesh, Sri Lanka, Indonesia, Cambodia, India, Pakistan, etc. In contrast to the initial steps, the final steps allow for decentralization, as it is possible to organize production in independent phases.

The main phases of the apparel assembly are: [a] cutting; [b] sewing; [c] finishing; [d] quality control; [e] pressing; and [f] packaging. These sectors can, of course, be further detailed. For example, the first step – cutting – implies the previous activities of design, patterning, product specification sheet, fabric storage, etc. With the pattern ready, the fabric needs to be layered and the pattern pieces are adjusted (fitted) on top of the fabric in order to minimize fabric waste. Technology plays a big role at this stage, due to CAD/CaM systems and the precision of laser cut (Saviolo & Testa, op. cit.). Such development benefits big producers, since for small companies many of those technologies remain prohibitively expensive.

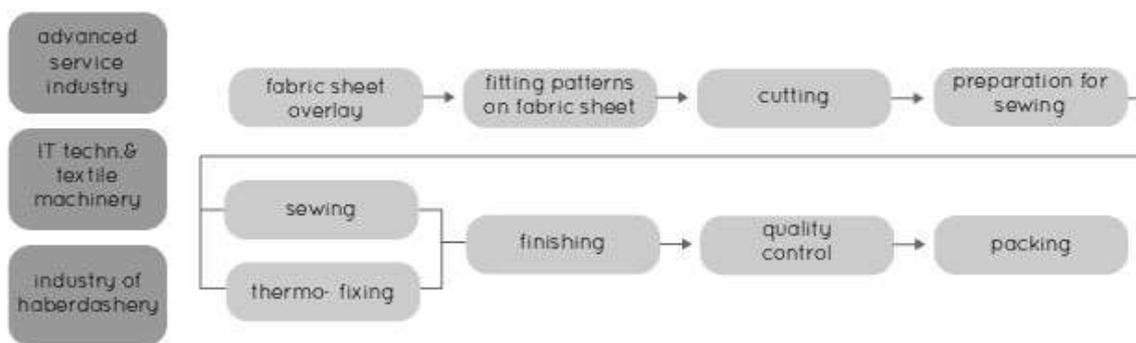
The [b] sewing phase relates more specifically to the idea of confection and assembly. It involves the separation of clothing pieces and the sewing sequence. In this specific sector, work remains quite manual, having sewers and seamstresses as its main work-force, which influences product costs and productivity. In order to increase productivity, managers organize the sewing sector in so-called *production-islands*, where employees are organized in groups and located according to the sewing steps, the machinery and their abilities (Rigueiral & Rigueiral, 2002). A similar concept is that of *production-cells*, i.e. grouping the machines and equipment used in the same processes of product transformation (Lidório, 2008).

[c] Product finishing steps may be added to the sewing phase: hand embroidery, stitching and the application of buttons or other supplements. The following stage of

product confection is, [d] quality control. During this stage, staff review the finished garments, removing loose threads, extra stitches or even discarding poorly sewed items. The controller usually inspects both sides of the garment, front and back, checking for asymmetries, failures, unfitting dimensions and other errors. This stage intends to evaluate the products' quality and to verify if the produced clothing items achieve the required specifications of the prototype or model. All garments, or a random selection of them, can go through quality control (Rigueiral & Rigueiral, op. cit.; Rech, 2006).

After quality control, the manufactured clothing items will be [e] ironed or pressed. This stage intends to define seams and details; for instance creases, folds and trims. Ironing and pressing also perform corrections into puckered or slightly crooked seams, or remove unwanted volumes in the garment (ibidem.). The next stage before distribution is [f] packaging. The sector receives all inspected and ironed clothes, folds them and wraps them with plastic bags or paper boards, accordingly to the products and companies' criteria. When wrapped and packed up, products are stocked according to the product reference, color and size in order to facilitate demand control and further distribution (Saviolo & Testa, 2015).

Figure 5 The confection sector in the production chain



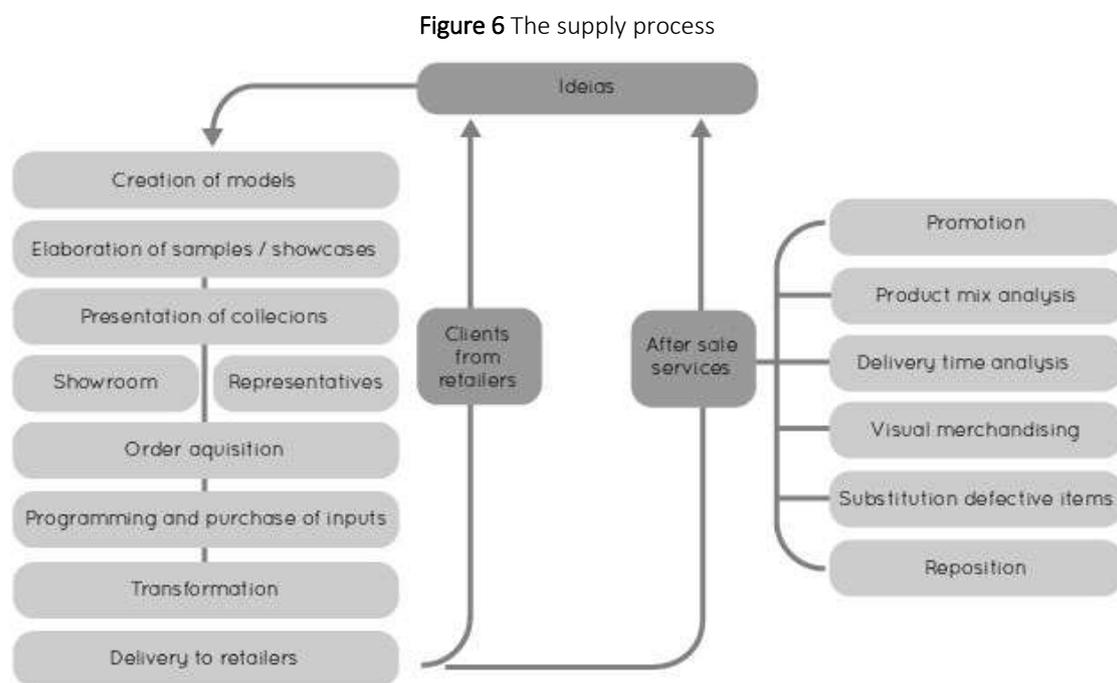
Source: from author

Figure 5 summarizes the different stages of the confection sector within the fashion industrial production chain. The presence of technology is noteworthy, as I.T. and textile machinery influence almost all processes and stages of the sequence. The figure also presents as input for the beginning of the procedures the expertise of designers, pattern makers, production managers and the advanced service industry, such as the information on fashion trends. The activities of product design, patterning and gradation, and the preparation of the product specification sheet and the control over processes influence the functioning of the whole chain, aiming for the best possible flow of activities, which, in turn, directly effects productivity.

The last macro-sector of the fashion product industrial chain is [3] distribution. Because it involves product sale and retail, the sector is often ignored when presenting the industrial structure of fashion production, since its activities occur outside the industrial walls. The distribution sector can be divided into [a] wholesales; [b] retail; and [c] e-commerce. Despite the recent alterations in distribution, [a] wholesales remain

important channels, for they work as inputs for many retailers. It composes a complex field, which involves specific knowledge on management and even a specific calendar, from which some important features – in terms of the scope of this dissertation – will be herein disclosed.

[a] Wholesale (B2B) consists, roughly speaking, in a transaction between two corporations, i.e., among legal entities. The transaction involves the figure of the fashion buyer, who represents the retail corporation, and the merchandiser or commercial representative, who works on behalf of the wholesale corporation. As one can notice in Figure 5, the product supply process follows stages of producers preparing prototypes, models, and sample books to present to potential buyers in showcases, showrooms and commercial fairs. The direct contact between retailers and consumers serves as feedback for the development of a new collection or singular products.



Source: Adapted from Dillon (op. cit, p.69)

A pertinent aspect of wholesale is that most sales are made in advance. The time between the product purchase order and delivery can be up to nine months (Saviolo & Testa, op. cit.). Among other aspects, this implies strong anticipation, planning and coordination of stocks and sales for production. However, technological and organizational developments that have been remodeling the entire industry’s capabilities have influenced the acceleration, flexibility and responsiveness of production. Such transformations result in the condensation of the interval between production and distribution, which for wholesalers means working on a three-month calendar in opposition to the seasonal six-month calendar (Dillon, op. cit.).

The [b] retail (B2C) segment is the most recognized distribution channel, for it is mainly in physical stores where customers are in direct contact with fashion products. Dillon (op. cit.) divides retail into many different categories, from franchises to boutiques,

with emphasis on [I] independent minor retailers, [II] big distribution chains and [III] minor retailers on the internet, which due to its relevance in this work will be presented as a specific channel - [c] e-commerce. Following the general explanation for wholesale, retail consists in transactions made between individuals and a corporation.

[I] Independent retailers, often still referred to as boutiques, faced and still face the pressure of [II] big distribution chains and [III] e-commerce. Their focus in order to survive is on personalized service and rapid changes in their offer. Such environments often propose a limited but consumer-focused product mix from one exclusive or different brands, being then either monobrand or multibrand. Monobrand boutiques offer exclusive products from independent designers or brands, and can use close contact with and experience of consumers in previous seasons as a habitual base for the planning and design or purchasing of a new collection.

The multibrand approach usually sells exclusive or not exclusive items of various designers and brands. Distribution involves producers working as wholesalers through the figure of the sales representative and fashion buyers. Also important for the multibrand context are commercial fairs and showrooms, which follow a specific calendar. Both multi and monobrand retailers rely on personalized services and the rapid change in their offer, usually made shorter in advance, recently following a new three-month-calendar, as previously mentioned (Dillon, op. cit.).

[II] Big distribution chains are retailers who own more than 20 points of sale, that is, who own a chain of stores (ibid.). The big chains are companies that work with centralized management and invest in scale economy, which consists in reducing costs by increasing the number of products manufactured and sold. That also means that such companies face the risk of presenting a homogenized product mix. For this reason such chains, which dominated the retailer scenario in the 20th century fashion market and caused many small stores and independent labels to close doors, are now facing the resurgence of independent retailers that sell exclusive products.

Some examples of [II] big distribution chains are H&M, Mango, Topshop, Zara and C&A. Dillon considers that such a system is not as popular as other retail systems in continental Europe and in the United States of America. However, one can easily notice in the shopping blocks of any major European city and in shopping malls around the globe the strong presence of such retail chains. Their strategy changed in the 21st century, focusing on the young and fashion-enthusiastic public by investing in collaboration with famous designers (Figure 7) and it-girls⁶, by renewing their product offer, and by enhancing the interior appeal of the stores that are now modern environment shopping spaces (ibid.), stimulating purchases.

Retail on the internet, also known as [c] e-commerce, has now become one of the main distribution channels for fashion products. The medium allows companies and

⁶ "An It Girl is a trend-setting (in fashion, lifestyle, etc.) woman or girl with a ton of self-confidence and self-worth that sets the example of how to have it all, and look good doing it. " (Uruban Dictionary, 2017. Retrieved from: http://www.urbandictionary.com/define.php?term=it+girl&utm_source=search-action.

brands to sell directly to the final customer, with specific cases of retailers that sell exclusive online *e-tailers* (ibid.). The SDI Group (2016) presents the e-commerce distribution channel as the fastest growing segment in fashion. Challenges are the growing number of orders and the need for minimizing errors attributed to the growing number of distribution channels. Specialists also point out that labor and shipping are the main factors for rising prices throughout the distribution.

Figure 7 Lookbook Alexander Wang for H&M in 2014



Source: Retrieved from Vogue France (2014)

Other segmentation models divide the distribution scenario; for example the *internal and external channel* model of Saviolo & Testa (op. cit.) referring to retail and wholesales. *Direct channels* consist in ownership of monobrand retailers and franchises, whereas *indirect channels* consist in inserting products and brands into bigger multibrand stores. Regarding the acknowledgment of e-commerce, which is a highly valuable and growing distribution strategy, the model proposed by Dillon (op. cit.) was chosen to compose the theoretical set of this dissertation. However, the rich distribution segmentation of Saviolo & Testa was summarized in the Chart 1.

Chart 1: The segmentation of distribution channels

Direct channel	
The company directly manages the sale to the customer	
Type of store	Description
Flagship store	Big surface company's property with wide range of products "total look" oriented with the goal to reproduce the brand's identity in the point of sale.

	Represent overall an investment on brand communication. May be concept stores. Example: Niketown in New York.
Concept stores	Point of sale where the brand strategy is executed, intended to create customer satisfaction and loyalty rather than to stimulate purchases. Products are set in a differentiating context, with a defined identity and the ability to attract consumers. Such spaces strategically aim for an emotional/informational dimension. Example: Havaianas concept store in São Paulo.
Self-standing stores	Stores whose surface varies between 50-200 square meters, on the street or in a big mall or shopping center, galleries accordance with the system of signs and brand policies. They can be properties or franchises. Example: Channel franchise store in Berlin.
Shop-in-shop	A store inside a store usually has a limited surface area between 10 and 100 square meters, inside another commercial store, with a wide offer and professional sales people. In this case, the product's brand and the point of sale's brand coexist, and positively reinforce each other. Example: Tommy Hilfiger corner in a Peek & Cloppenburg point of sale.
Corner shops	Space of small dimension (10-30 m ²) designated for a specific brand and of personalized design located inside a multibrand surface. Such spaces present a coordinated product mix and allow the brand to express the brand identity and image within the multibrand magazine. Payments are made directly in the corner. Such a strategy allows for better service management, controlling sales daily and maintaining a good assortment level. Example: Swatch shop at El Corte Inglés.
Indirect channel	
The company does not directly manages the supply offer, but uses intermediate services	
Type of store	Description
Traditional specialized stores	Provide a reduced but varied assortment on brands, high level of client assistance and a policy of high prices. They are usually divided by segment (men, women and children) and by product type. Example: Multibrand boutique in any city.
Big magazines	They are of medium-big dimension, provide specific areas for specific products and positioning is not only price-based. Own brands coexist with other brands' corner shops. Usually allocated in big urban centers and well appraised by all suppliers. Examples: Bloomingdales and Macy's in the United States, Galeries Lafayette in Paris, Peek & Cloppenburg in Germany, etc.
Big specialized surfaces	Stores characterized by concentrating small product types (underwear, sportswear, shoes), wide and varied product range, brand products and their own product lines, adopting all price segments. Example: Decathlon
Popular magazines	Generalist stores, with a wide and slightly diverse product range, mixing own brands with "brandless" products, low prices and the image of convenient commerce. Example: C&A
Outlets (distributors and enterprise)	Channels of sale for the remaining items from past seasons. The distributor has many brands and suppliers in stock. and outlets are directly managed by the enterprise. Both have small ranges of products in quantity and variety, discounted fees and no customer service. Examples: Hugo Boss outlet store in Metzingen, Germany and the discount-chain TK-Maxx in Europe.

Source: made by author from Saviolo & Testa (op. cit.)⁷

⁷ Examples were chosen by the author.

Distribution recently acquired great importance in the fashion business due to a new relationship between production and distribution. The distribution channel shortened up and gave place to new distribution strategies. Managers now try to find bigger benefit margins by organizing supply management at the point of sale, in a distribution strategy called *lean retailing*. Such a tendency demands flexible production management, usually *agile supply chains* and *quick response systems*, which allow manufacturers to respond rapidly to the frequent changes in market preferences (ibid.; Čiarnienė & Vienažindienė, op. cit. Dillon, op. cit.; Bhardwaj & Fairhurst, 2015; Cietta, 2010, Mihm, 2010).

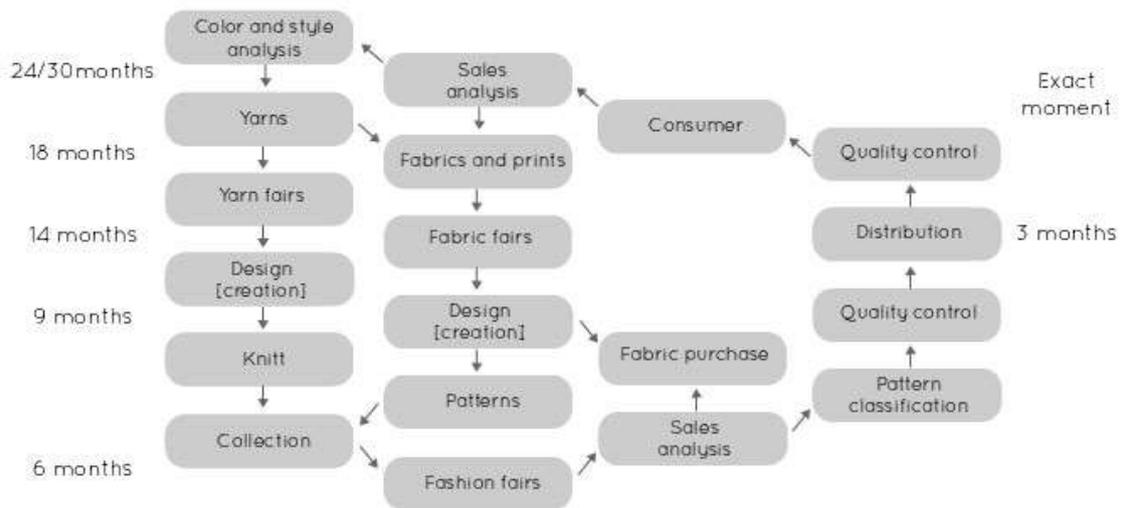
2.2 THE CALENDAR

Not ignoring the most recent developments in the fashion industrial chain that have accelerated the sequence of stages, a three-year calendar organized – and by some means still organizes – a substantial part of the fashion industry. The complex fragmentation of the textile production process demanded the control of each stage – from fiber to finished product, through spinning, weaving, printing, cutting, assembling and finishing – in a marathon time schedule (Rech, op. cit.; Vincent-Ricard, 2008).

Even nowadays, as each phase of the production process lasts nearly six months, the complete cycle between fiber manufacture and consumer purchase lasts – in more traditionally organized businesses – over two years (Dillon, op. cit.). The so-called fast-fashion companies, Zara being the prime example, somehow manage to condense confection time into two weeks. However, the greatest part of the industry maintains a slightly accelerated version of the traditional calendar. Such acceleration is possible due to an environment with a comprehensive range of goods, where the availability of raw materials and auxiliary inputs like fibers and dyes reduces the need for coordination.

Traditional coordination has followed the subsequent deadlines: [1] dyes and fiber suppliers initiate the cycle 36 months in advance. Being at the beginning of the chain, there is a view that dyes suppliers still maintain a sort of hierarchical position in the industry, for they can direct the subsequent stages. [2] Threads are planned 18 months beforehand, and [3] fiber international fairs 14 months, considering the time to develop samples and displays. Next in the schedule comes [4] fabric research and development, which happens one year ahead, and two months later the fabrics are exhibited at [5] fabric fairs, i.e. ten months ahead. In this traditional collection-based logic, [6] design takes place around nine months prior to commercialization, followed directly by [7] production. [8] Retail receives orders from as long as three months before sales (Figure 8).

Figure 8 Timing of the production chain



Source: Adapted from Jones (2011, p.31)

As an example of the traditional sequence of steps, Rech mentions that the collections that appeared on São Paulo Fashion Week runways in July 2006 for Spring/Summer 2006/2007 were available at stores in September 2006. At the same time, weaving companies produce for the next Spring/Summer collection (for example SS 2007/2008), and chemical and dye companies already plan and produce for the collection happening two years later (AW 2008/2009). In terms of the northern hemisphere, Spring/Summer collections presented in February 2006 would reach stores in April. Simultaneously, weavings companies produce fabrics for the Spring/Summer collection for the next year, while dye and fiber companies invest time in planning and manufacturing for up to four collections in advance.

Considering producers who work in the “make to order” model, also known as the programmed model, and regarding a low-risk answer strategy, the collection presentation at the showroom or by commercial representatives happens for the Autumn/Winter collection in the months of January, February and March and for the Spring/Summer collection between July and September. Consequently, the lead time, i.e. delivery time, for Spring/Summer are in the months between July and September and for Autumn/Winter between January and March. Such a model maintains a long lead time of three to four months, and a time to market, i.e. commercialization time, of around nine months (Saviolo & Testa, op. cit.).

Some textile and fabric producers that supply for fast manufacturers have reduced their production timing to 10 to 40 days (ibid.). One of the strategies adopted by fabric producers is providing unfinished products, i.e., fabrics that did not go through bleaching or dyeing processes. These fabrics are transformed into semi-garments, which are therefore easier to adapt into the short-term demands of consumers informed by retailers. For example, a company may dye finished garments at short notice after preliminary sales results, ensuring delivery of enough items in best-selling colors.

As mentioned, the speed with which companies go through manufacture has altered and diverges from business to business. *Haute couture* has much shorter cycles, as designers present the final products directly to clients. Fast-fashion companies also adopt shortened cycles by relying on vertical coordination and just-in-time production, and on the ownership of their points of sale. As a consequence of overall acceleration and the desire to answer more quickly to market demands, some retail companies have altered their deadlines by reducing their delivery time (lead time) from 3-4 months to 15-30 days, and their time to market from the former 9 months to 20-60 days.

The news of Burberry speeding up the calendar, offering clothes seen on the runway of New York Fashion Week right away at stores in February 2016, drove discussion in the field of fashion. Most media vehicles published Burberry’s move as daring and exciting, and as having a big impact on the fashion week model and in the fashion calendar (Figure 9), which is now considered obsolete (FFW, 2016). Despite the excitement of many in the industry, there is a more skeptical view that the phenomenon tends to have little effect on other companies and brands. In order to have collections ready for purchase by the time they are presented on the runway, a complex support structure is necessary, and this presents a significant challenge for less remarkable and mature companies. Another factor that contributes to Burberry taking this step is the brand’s consolidated design and heritage, exemplified by the trench coat. Specialist Patricia Sant’Anna (2016) considers that Burberry’s step is a strategic step for the brand, but may not necessarily represent a revolution for the fashion system.

Figure 9 Burberry's Operational Timeline



Source: Illustration: Costanza Milano for Business of Fashion (2016)

Another modification proposed by Burberry follows recent changes in fashion seasons, driven mostly by the acceleration of product launches and the global presence of brands. In 2016 Burberry, with the intention to disrupt the season logic, named collections “February” and “September” instead of Spring/Summer and Autumn/Winter (Hall, 2016). In Brazil, São Paulo Fashion Week decided to abandon collection reference to their editions, numbering them instead – for example, the edition that occurred in April 2016 was entitled SPFW 41. Fashion week director Paulo Borges also presented the

change in the dates of the shows to match the retail launching dates; i.e., the runway presentation will now occur in the months of February and June (Alonso, 2016).

Another aspect of this trend is the introduction of more collections to the traditional seasonal calendar. Fashion has traditionally organized itself in two seasons since the 19th century, coordinated by the lifecycles of the upper classes in the West, which in summer departed to the countryside and in winter attended balls, the theater and the opera (DeMarly, 1980 *apud* Skov, 2006). It is hard to define when in-between collections entered the calendar of enterprises, as it was a gradual process that resulted from fast fashion companies renewing their supplies in a continuous flow.

Figure 10 Valentino's resort collection 2016



Source: Vogue (2016)

Not all of the fashion system has followed this acceleration. Most *haute couture* and *prêt-à-porter* houses still follow the two-season calendar. Most fashion weeks also maintain the traditional biannual structure. Commercially oriented brands and companies tend to produce four collections per year (considering male and female as a single collection), by adding a Pre-Spring or Cruise Collection and Pre-Fall collections (Figure 10). The collections are usually commercialized by monthly releases, dividing the

four collections into 10 smaller “sets” for retail. Designers, however, tend to create continuously, presenting items to customers as part of a quick-response strategy, even if they are detached from the original collection.

Fashion forecasting agencies also maintain trend books and reports oriented to the two main seasons, Spring/Summer and Autumn/Winter. They generally start communicating trends two years in advance. This means they influence the industrial chain usually from the fabric producers onwards – in terms of the traditional calendar (Figure 8). The main sectors who supposedly benefit from fashion trend forecasting are marketing and distribution, but mostly design. Yet with the acceleration of the chain, trend forecasts tend to impact the earlier production stages, such as fibers and fabric production.

This study questions the importance of trend forecasting agencies, due to the fact that constant changes in the fashion business have enabled rapid response to consumer desires and trend developments. Rapid response can also be based on data about the success and failure of product sales by the brand in other seasons. Rapid reaction was made possible by information technology and industrial quick-response technologies, as well as the widespread availability of raw materials and inputs – which makes the supply and demand coordination, at least within the fashion industry, unnecessary. In such context, the role of trend research companies has changed, and now focuses on advising creative designers and marketing directors with inspirational inputs that are supposed to be coherent with future consumer lifestyles.

The transformations in the scenario have caused trend forecasting agencies to broaden their action scope, and they now offer data mining and analysis for the planning of future collections and retail purchases. This reflects the wide use of sales statistics by fashion companies, and their supposed reliability. It is necessary to stress that such new expertise of *bureaux de style* not only maintains trend forecasting agencies as experts in counseling fashion companies, but also feeds their database with data on all their clients sales success and failures, which is certainly used as a strategy to identify general trends in retail and consumer preferences throughout the world and across different market segments.

The acceleration of fashion cycles has also influenced *bureaux de style* by accelerating the information feed, since companies now update their portals, and social media, on a daily basis. They also offer updates and reviews on previously launched reports, and release information packages which analyze the most recent indications from retail and the runway that influence seasonal direction. The flow of information also puts pressure on designers, who feel the need to react to consumer demands for shorter lead times. The growing demand for novelty comes from not only internal drivers of the fashion business – the need for renewed demand – but also from external factors, with trendsetters and lifestyle changes influencing consumer demand. These external factors make trend forecasting predictions increasingly hard to follow (Čiarnienė & Vienažindienė, op. cit.; Carter, 2013).

Čiarnienė & Vienažindienė summarized research by various authors on the characteristics of the modern fashion industry, as presented in Figure 11. Among other things, the dynamism and globalization of the contemporary fashion industry, enabled by technologies and new management forms, has offered producers the chance to meet the demands of customers in ever-shorter delivery times, synchronizing the supply-chain to meet the peaks of demand (ibid). Consumers demand shorter lead times and push companies for quick decision-making, because product demand is rather inconstant and unclear.

Figure 11 The main characteristics of the modern fashion industry



Source: Čiarnienė & Vienažindienė, op. cit., p.65

At the same time, order volumes have increased, with a tendency for a vast number of end products. Authors (ibid.) notice a trend towards vertical integration, which diverges from the still prevalent outsourcing strategy (Saviolo & Testa, op. cit.). The scenario is highly complex and requires great flexibility among fashion companies. The former apparel pipelines are characterized as being long, complex and rather inflexible. Such an arrangement induced long buying cycles that are unsuited to the demands of the contemporary industry (Ibid.; Jones, op. cit.; Hines, 2004; Skov, op. cit.; Biouse, 2012).

The fashion market, based on dynamic relationships between supply and demand, falls on Simmel's paradox. The more consumers are exposed to constant fashion cycles and the rapid transformation of products' aesthetics, the bigger is the need for the low-cost availability of products, which causes cycles to shorten once more, since the widespread availability of a 'fashion' diminishes its distinctive value, pushing the creation of new models (Simmel 2015; Schüssler, op. cit.). A countertrend to this unattractive abundance is adopted by young avant-garde designers, who revert to presenting only two annual and compact collections (Edelkoort, 2016).

2.3 CREATION

Considered a creative industry, the fashion industry is characterized by balancing creativity with economic and business aspects. The creative dimension is vigorous in the field, since it is moved by the programmed renewal of still functional products due to a presumed symbolic obsolescence. While creativity and inventiveness of major brands and designers are highly valued in the industry – among competitors and consumers – the vast majority of companies offers more basic products to consumers, following the so-

called *80-20 ratio*. That is, only 20 percent of new collections' products are considered more inventive or "fashionable", as opposed to 80 percent of the total consisting of basic products or previous seasons' bestsellers, and often common among all international brands (Biousse, op. cit.).

The management of creativity in fashion companies also lies in the association between variability and variety (Saviolo & Testa, 2015). The balance between the quantity of products offered and the novelty and differentiation of such products is imperative, since the production of basic or bestsellers is facilitated, but the degree of differentiation of a company's or brand's products is associated with its degree of inventiveness and creativity. On the other hand, if a product is highly fashionable or trendy, companies assume that their demand is unpredictable (Čiarnienė & Vienažindienė, op. cit.). Thus, within the business organization of fashion, creation and innovation are always grounded in the production aspects and the operational costs of production.

Despite the high recognition of companies considered great fashion creators, for example the *haute couture* and *prêt-à-porter maisons*, the commercial fashion product intends to find the optimal point between norm and trend, between marketability and creativity, between tradition and innovation. According to the research by Hung and Chen (2012), trend adoption (trendiness) influences a product preference and strongly affects the apparent perception of a product. At the same time, when the adoption of a novelty is moderated, the aesthetic preference for a particular product increases, which indicates the required ability to combine innovation and typicality in product design.

The Chinese research was, however, conducted outside the fashion branch. Therefore, the specifications of a field so closely related to variation and change need to be considered – as the next Chapter (3) will further detail. The results from Hung and Chen remain relevant for the majority of fashion companies that search for the perfect degree of aesthetic trends and product normality with the intent of attracting the biggest possible number of customers. Independent designers and more exclusive labels, which have a limited production possibility and intention, prefer to develop fashion items with remarkable aesthetic qualities – often independent of regulated market trends – in order to make profits from the symbolic value of the inventiveness and innovation of the designs.

2.3.1 Innovation

Innovation has become an important word in the context of the twenty-first century. The field of design has given the concept greater relevance since the 1990s. The term means to turn new, to change or to alter things, to introduce new features, to renew. Innovation does not necessarily relate to the particular aspect of its result. However, it designates the implementation of a new or significantly improved product or process, new marketing method, business organization model, place of work or relationships (OECD, op. cit.). Innovations tend to respond to market needs and desires,

iteratively adapting products and services, arranging and rearranging knowledge, tools and technologies.

It can be applied at various levels; in products, processes, positions and/or paradigms; innovation is not the change of objects alone, but the perceived improvement process, which can be incremental, radical or distinctive in accordance with the degree of novelty (Tidd & Bessant, 2008; Verganti, 2012; Rampino 2011, et al). In the field of fashion, visible changes of garments are perceived as incremental innovations, since novelties – aesthetic variations are in fashion often referred to as novelties – respond to the stimulus for constant change in fashion societies. Cases of radical and distinctive innovation in the fashion industry are rare, but there are historical cases of radical innovation and recent cases with a high degree of innovation in the use of non-conventional or innovative materials (Figure 12). Therefore, one may affirm that radical innovation in the field of fashion is commonly driven by textile technology⁸.

Figure 12 “Arpodor” sneaker made with salmon leather (e-fabric Project)



Source: Osklen (n.d.)

The innovations most commonly associated with fashion are aesthetic. They imply stylistic innovations related to market differentiation and product attractiveness. Some authors refer to product novelty when addressing innovation in fashion (Dhurup, 2014; Hung & Chen, op. cit.). In the fashion branch, product novelty implies the introduction of new or unique fashion products in the market, followed by increased relevance, and excitement from consumers who want to sample the new trend or fad (Dhurup, op. cit.). It is a pertinent attribute considered by consumers when faced with a decision. Product novelty drives brand-consciousness, loyalty, overall better brand attitude and increased product value (ibid.).

However, aesthetic and stylistic innovation does not alter the use of a product or its functionality. Innovations in fashion are significant, however, due to the symbolic value of fashionable goods. At the height of industrial garment production, there was an investment in the expansion of consumption based on the aesthetic and symbolic obsolescence of products, which from a functional point of view could be used for longer.

⁸ This work, however, addresses aesthetic and cultural innovations researched and led by bureaux de style. Therefore further considerations on textile technology and innovations are here unsuited.

The cyclical fashion dynamic therefore invests in the presentation, replacement and rescue of motifs, shapes, colors and textures as expressions of fashion trends, which for being positively recognized are qualified as innovations and product novelties.

According to Mozota (op. cit.), consumer satisfaction by subjective and intangible product attributes also infers innovation, since innovation guided by design consists of transformations in the meanings attributed by consumers to a particular product. Thus, fashion products involve innovation on an aesthetic and a signifying level, following Rampino's (op. cit.) classification, which also considers the use of innovation and typological innovation. The concept of innovation is linked to the concept of competitiveness, and to the success of companies and organizations. In the fields of fashion and design, innovation relates to the practice focused on design creativity, combining logical and intuitive processes for the construction of symbolic capital (Kistmann, 2014).

Hence, innovation aims at the generation of systems, processes and products that result positively on the competitiveness of companies. This openly addresses fashion companies, since fashion is directly motivated by financial and commercial interests. The production of fashion items occurs through industrial processes. Fashion inhabits a broader universe, however, since it directly addresses both an aesthetic and a symbolic sphere. The industry (confection) of consumption goods materializes the conceptual creations of a culture (Perassi, Gomez & Campos, 2013). The conceptual production is a *locus* for the designer's action, whose activities encompass planning and developing fashion collections and products for the upcoming seasons.

2.3.2 Collection and product design

Products rarely have value in themselves, rather they are evaluated in response to the desires and wishes of consumers. Product properties are both material – referring to functional, physical and technical qualities – and immaterial – connected to psychological and cultural consumer motivations (Campos, op. cit.). In order for a fashion product to reach the consumer, it must go through a dual process. One of the processes is technical-productive, and involves the material production of the final clothing and apparel products (discussed in Section 2.1). The other process corresponds to the artistic and creative project, which is the phase in which the ideas and concepts about a product or collection are designated to a physical product, i.e. the product idea is converted into a production-viable product (Gimeno, op. cit.; Rech 2002). As previously mentioned, the management of entrepreneurial creativity involves the design and inventiveness of the creative team (creative design and management), and also the industrial and financial aspects that have profit and the maintenance of consumers as their main goals.

As stated, a fashion product often goes beyond the material aspects and involves overall symbolic contents and associations during its purchase and use. Of course, not all products have the same degree of style, novelty or trendiness, and therefore they also vary in symbolic content. A general product segmentation grounded in the consumer

goods product classification of the American Marketing Association considers three product typologies. [a] Basic products are those repeatedly purchased and less subject to the changes of styles and trends. [b] Consumption products are brand products recognized for their differentiation in style and price and the high emotional and immaterial value. They are highly susceptible to trends and fads. [c] Exclusive products are considered unique by the consumer either due to the innovative style and material, or due to the brand. This type of product often refers to recognized accessories of famous brands and other desired objects (Saviolo & Testa, op. cit.).

Despite recent changes in the production and commercialization of fashion products, with the launch and relaunch of specific garments or groups of garments, the fashion industry mostly works with the concept of product collection. This concept is based on seasonality and can be defined as a set of products grouped by various criteria. The criteria can be technologies, colors, materials, typologies, markets, etc. For the design, a color, shape and fabric range needs to be defined in order to create a balance between the number of products, fabrics and collection highlights. The selection will define an image and unique identity, and provide consistency to the collection and the brand, making the proposals cohesive (Jones, op. cit.) (Figure 13).

Figure 13 Dior Spring/Summer 2017 Collection



Source: My Face Hunter (2016)

In the fashion system, product design is commonly referred to as collection development. Such a project is run by designers and by the creative or style team, with the goal of designing a range of products under certain variable conditions. A fashion project is systematically defined, usually lasting from two to six weeks, and combines research and practical activities. The project's concept, tasks and goals are specified in a

briefing by the merchandiser or company director (Jones, *op. cit.*). Although there are different methodologies of fashion design, many of them have similar and/or corresponding steps. From a managerial point of view, Saviolo & Testa (*op. cit.*) organize the project management of collection development in four stages: [I] definition of guidelines; [II] definition of structure and plan; [III] executive development and [d] evaluation.

The first phase of collection development is the [I] definition of guidelines. At this stage general characteristics and the collection's goal are defined, along with important brand style elements and codes. The various decisions are often based on data-mining of previous collection sales, complaints and successes. Alongside this, market research analyses data on market, distribution, competitors, and positioning, also suggesting possible alterations to consumer segment and distribution channels. The third informational input comes from the creative direction team, based on recent trends and topics, where they present general guidelines of aesthetic content, shapes, materials, colors, etc. (*ibid.*).

Designers rely on various sources of information during the research phase. According to a study conducted in 2014 by Silveira on information management for the creative fashion industry, the main available data originate from [a] associations, [b] exportation agencies, [c] institutes and research centers, [d] specialized libraries and museums, [e] second-hand shops, [f] written publications, [g] fashion trend information portals, [h] blogs, [i] fashion weeks and runway shows, [j] travel researches, [k] street researches, and [l] textile and fashion fairs. Perhaps focusing on a more inspirational perspective of data collection, Silveira neglects to present more financial driven information, such as data mining analysis, which does influence designers before and during the creative project.

Retailers' designers are inspired by many things and utilize information from fairs, catwalk shows, local street fashion, films, music videos, art as well as trend analysts and their own experience (cf. McRobbie, 1998; Slater and Tonkiss, 2001, 176–81; Wentig, 2008). In most cases, there is limited design input from the manufacturers with whom branded retailers work. In fact, most garment suppliers are operating according to Tayloristic principles, far from 'aesthetic economies' and 'cultural industries' (cf. Power and Scott, 2004). (Aspers, 2009).

Data mining analysis is extremely important in the fashion market, regarding marketability and commercial assertiveness. The commercial department provides an overview of market wishes by analyzing previous sales, extrapolating results and responding in advance to future desires – or present desires, since this sort of control seems to happen on a weekly basis. The interaction between design, marketing and commerce sectors seems to be a safe way to define collection guidelines, analyzing not only this data as criteria to decide which trends to follow and which trends not to follow. An important standard derives from business assets, often referred to by companies as heritage. A clear definition of the guidelines – a perfect balance between trendiness, the brand's style and market opportunity – is organized in the [II] collection's structure and plan.

The overall definition of the collection plan is the merchandiser's responsibility, i.e., she/he defines the collection's global structure. It consists in defining the brand, and commercial and distribution positioning strategies. In this stage [II], the first step consists in deciding the product lines, production and distribution timing, and it may incorporate pre-collections, main collections, flash collections and classic clothing items to be replaced throughout the season (ibid.). Each of these collections have specific characteristics and goals, and merchandisers need to analyze the viability and return on investments of time and money. The second stage [II] is the construction of the collection plan, the *merchandising plan*. It consists of sets of specific qualitative and quantitative delimitations of the product offer repertoire. Such delimitations compose a collection planning spread sheet (ibid.) for the development of collection content. At this stage merchandisers should also decide the innovation degree, verifying the availability of internal and external resources.

Before the [III] executive development, which involves the development of prototypes and displays, and the rational measurement of the work load and material needed for the various stages, the effective creative development takes place. Montemezzo (2003) adapted the traditional design methodologies of Baxter and Löbach, and reviewed the fashion product development methodologies of Silva & Radicetti and Rech, in a compact and product-oriented methodology that is coherent with the methodological approach of fashion design accepted in the academic field of fashion (Chart 2).

Stages [i] planning and [ii] design specification mainly resemble the stages [I] and [II] of Saviolo & Testa. Stages [iii] and [iv] – and the action of alternative selection and detailing configuration of stage [v] – consist primarily in the activities of design, where the other actions of stage [v] evaluation and development and [vi] completion refer to stages [III] and [IV] of Saviolo & Testa's managerial perspective. The design stages are considered central to product development because they involve creativity and innovation. However, they are grounded on stable guidelines and structures, not ignoring the commercial commitment of fashion companies. After a collection is launched, the [VI] evaluation stage is reconnected to the first steps of the [I] guidelines stages, since the evaluation gives informational feedback about processes and products, aiming to improve the product design methodology, processes and tools.

The objective of the evaluation is to create collections that are coherent with the market's expectations, with the production requirements and with the company' goals. Regarding market's expectations, fashion designers should equalize permanent and seasonal aspects. Permanent aspects relate to branding and positioning strategies and medium and long term stylistic decisions, in reference to what would be the brand's stylistic identity. On the other hand, seasonal aspects refer to trends, and the ability of the brand continuously to introduce novelties in the market, changing and modernizing the product proposals. Based on the greater and lesser degrees of adoption of each of these aspects, one can consider two extreme modalities of companies – and a whole

possibility of gradation of between the two poles. Those companies more directed to the market, with a high responsiveness to trends and with urgent production, and those companies more directed to the designer's taste and style, such as *prêt-à-porter* houses and individual designers, who are more focused on their heritage and more willing to create trends than to follow trends (Saviolo & Testa, op. cit.).⁹

Chart 2 Fashion/clothing product development

Stages	Actions
[i] Planning	Market perception and discovery opportunities
	Analysis / expectations and commercial history of the company
	Ideas for products / design problem identification
	Definition of marketing, development, production, distribution and sales strategies
	Planning
	Setting the schedule
[ii] Design specification	Analysis and definition of the design problem (guidelines)
	Consumer's universe synthesis (physical and psychological)
	Fashion content Research (trends)
	Project demarcation (goals)
[iii] Conceptual delimitation	Generation concepts and definition of the generator concept
	Definition of functional principles and style
[iv] Alternative generation	Generation of problem solution alternatives (sketches/drawings)
	Definition of configuration, materials and technologies
[v] Evaluation and development	Selection of the best alternative(s)
	Detailing configuration (technical drawing)
	Development of technical sheet, modeling and prototype
	Ergonomic and usability tests
	Corrections / adjustments
[vi] Completion	Refined technical and commercial evaluations
	Corrections / adjustments
	Patterning graduation
	Development of the final technical specifications sheet (technical and commercial approval)
	Purchase of raw materials and trims
	Orientation of production and sales sectors
	Definition of packaging and promotional material
	Production
	Launch of the product

Source: translated from Montemezzo (op. cit., p.62)

Most companies in the contemporary scenario are, to a varying extent, directed to the market. Despite the fact that reacting to trends is simpler than creating them, designing products that merely respond to easily recognizable market opportunities – in terms of trends or sales numbers – leads to the risk of offering trivial products. That is, supplying products with ratified and imitable stylistic content, which are similar to the

⁹ The issue of different types of fashion companies, although already introduced will be discussed more precisely in the topic 2.5 of this chapter.

competition or to other widely offered products, requires little or no investment in creating a stylistic identity for the brand and its products. Regarding creation in the fashion system, Skov and Melchior (2010) consider that the widespread institutionalization of fashion has routinized interactions and leaves limited space for individual creativity or expressive innovation.

For them as for other authors (Crane, op. cit.; Kawamura, op. cit.), fashion stubbornly relies on models established by the fashion system coordination, with various institutions uninterruptedly following the same patterns and paths, reinforcing the same structures. For example, *haute couture* and *prêt-à-porter maisons* are known for being some of the last open spaces for innovation with a high level of aesthetic and conceptual experimentation in statement creations – although radical innovations are rare in the field (Verganti, op. cit.). Many runway designs never reach the market; the shows serve as statements about the creativity of the brand and designer, and as inspiration for the ready-to-wear collections of those *maisons* and other fashion brands.

The use of *prêt-à-porter* runway shows as inspiration is widely adopted in the fashion scenario, and even trend forecasting agencies produce reports based on these shows. The reports present favorite or possible high-impact trend items, and also the confirmation of the adoption of certain trends diagnosed by the *bureaux de style*, months or even years in advance. The overall information of trend itself is reinforced in the commercial relationship between the various actors of the fashion system. During collection development companies decide either to follow some specific trends or to find their own path adapting and filtering them to their customers' profiles and to their brands' style.

As previously stated, the management of creativity and innovation in fashion is rather problematic, for it needs to combine aesthetic and symbolic aspects with economic and competitive ones. Fashion designers feel pressured to direct their creation to the market since they themselves are evaluated by the company's direction on market acceptance and sales success¹⁰. Product managers work along with designers and merchandisers in order to provide a clear global structure and configuration of the season's demand for the creative team (Saviolo & Testa, op. cit.), aiming to best attend to the designer's creativity intentions and the company's expected profit, all in accordance with the various support institutions of the fashion system.

2.4 COMMERCIALIZATION

Despite a strong tradition, the contemporary scenario of fashion competitiveness has changed in recent years. The 1980s saw the increased democratization of the phenomenon, along with the development of the mass market (ibid.). In this scene, various company models coexist with different business orientations, sizes, strategic

¹⁰ See Li Edelkoort's interview for the German newspaper Zeit Magazine. Retrieved 10 June 2016, from <http://www.zeit.de/zeit-magazin/mode-design/2016-01/berlin-fashion-week-lidewij-edelkoort-mode-fashion-designer>

profiles and organization systems. As aforementioned, there are market-driven companies as well as product or designer-driven companies. Such an orientation directly influences production strategy, with vertical integration and horizontal diversification representing the two extreme poles of current production modes.

Innovation in products and processes is a possible way to combat the extensive problem of cheap intensive labor in developing countries. Innovation related to the creation and development of high added value products, which also qualifies branding and design investments, has proven to be a key feature the current and upcoming fashion system's scenario (Kim & Johnson, 2009; Dopico & Porral, op. cit.; Tungate, 2005). As this chapter will go on to show, all efforts in product design, development, communication and marketing are interconnected, and they depend on the efficient organization of production, distribution and consumption.

A series of aspects need to be analyzed before the launch of a company. They regard the business concept, the market and merchandising approach, and financial matters. A good business plan for fashion requires the selection of the concept of the brand, the sector in which the company will be active, the business structure, the concrete product and commercialized service, and the success plans. Merchandising strategies are often defined by analyzing potential consumers and competitors and sketching out the brand's positioning. Financial planning considers the money fluxes, the profitability analysis, the pricing definitions and the sales predictability (Dillon, op. cit.).

As already mentioned in this chapter, fashion design companies can be organized under the criteria of fashion trend adoption. There are companies more directed to trend adoption and more directed to trend denial, responding differently to the market. More commercially directed companies tend to invest in fashion trends and fads. Many companies have followed the fast fashion model and have opted for the expansion of the product range. However, others choose to offer a limited product base, becoming specialized in certain types of goods or styles (Edelkoort, op. cit.). From a consumer's point of view, these companies operate a pre-selection of styles and trends, freeing consumers from the pressure of choice.

Various other criteria can be applied to differentiate the many possible types of fashion design companies. Considering the aforementioned fashion adoption/creation/denial and the production methods, the most common typologies comprise the most traditional fashion companies: [a] *haute couture* houses, which were followed by the rise of [b] *prêt-à-porter* in the 1960s; [c] mass market companies in the 1980s, which were precursors to the [d] fast fashion companies that emerged in the 1980s and 1990s but were popularized in the 21st century.

[a] *Haute couture* are at the top-end of the market, with high exclusivity and extremely high prices. Considered the birth of the fashion system for fixing innovation as a rule by proposing new shapes, colors and prints for each season (Monneyron, 2010), *haute couture* excels in high-quality, excellent finishing and extremely qualified handwork with garments made to measure. The extremely high quality and heritage give *haute*

couture prestige and success. The model is known for its high influence on the whole fashion chain because *haute couture* houses are experimental and creative, despite being few in number. *Haute couture* is often considered unsuitable to contemporary lifestyle and not so lucrative, since even at outrageous prices the reduced number of clients cannot fully sustain the costs of the ateliers. As a strategy, many *maisons* invest in *demi-couture*¹¹ and *prêt-à-porter* labels, which are far more affordable (Jones, op. cit.; Dillon, op. cit.).

[b] *Prêt-à-porter* encompasses a wide range of clothing made for wholesale at sophisticated department stores and boutiques (Jones, op. cit.). Since *prêt-à-porter* arose in the beginning of the industrial production of goods, it consists in the model of fashion organization, trade fairs, runway shows and the whole supply chain according to its specific – traditional – calendar. The first *prêt-à-porter* collection was presented in 1959 by Pierre Cardin, and it profoundly changed the role of the fashion designer, who needed to be more oriented to the market, taking inspiration from *haute couture*, but also from the streets and the *Zeitgeist* (Monneyron, op. cit.).

Since *haute couture* is protected by the *Chambre Syndicale de la Haute Couture* and has restricted access for designers and brands, *prêt-à-porter* still consists of luxurious clothes and of high quality, following the high standards of *couture*, but adapting them to a more easily diffused line (Jones, op. cit.). Using high quality fabrics, cuts and finishing, and investing extensively in advertisement and fashion weeks, *prêt-à-porter* products have high pricing and are also exclusive – although, clearly less exclusive than *haute couture* – despite the scale of production and standard sizes (Dillon, op. cit.). *Prêt-à-porter* fashion week shows also take place twice a year and present different trends and concepts for apparel from a more commercial approach, mobilizing the international press.

Another relevant company type with a similar approach consists of pure own brands. They are often small companies that exclusively produce their own brand and style and habitually delegate the production process. This type of company is often grounded in the figure of one or a few designers with highly creative abilities and style proposals, such as *prêt-à-porter* houses but without the intensive promotion. Production is usually outsourced. To this typology belong niche-oriented fashion houses that count on a regular, loyal and limited group of customers. With different product approaches, these companies are considered less competitive, since they are not suited to large distribution.

[c] Mass market companies address the greater part of the market. They produce collections in standard sizes and on a large scale. Along with industrialized production, mass market brands have a lower price range, being accessible to the greater part of the consumers. Reasonable prices are often associated with lower product differentiation

¹¹ Demi [half] *couture* labels are second brands of *haute* [high] *couture* labels. It still relates to the custom-made high fashion, but classified in a ready-to-wear business.

and exclusivity. Mass market companies have faced the challenges of adapting attractive product design to serial fabrication techniques, adapting the fit and cut, and managing the availability of materials. Many companies could be considered to be attending to the mass market, and they differ by having different positioning, attending to different consumer groups and presenting products for different occasions of use, as well as developing a well-directed brand style, in an attempt to distinguish themselves from the competition.

Also considered mass market, [d] fast fashion companies have clear specificities. The French and the Italians both claim the invention of such an “achievement” in the 1980s and 1990s (Campos & Gomez, 2016). Despite its origin, the biggest change introduced by fast fashion was the launch of more collections a year. The new dynamic stresses the role of consumers, since they drive the offer of products they want when they want them (Cietta, op. cit.). What drives the creation of fashion products in the fast fashion model is usually sales efficiency. Fast fashion companies substituted a logic based on the designer for a logic in which companies respond directly to changing consumer demands. The responsiveness to the consumers’ wishes is possible due to the vertical integration of the supply chain, making it feasible for a new product to be available for purchase within a few weeks.

Another relevant aspect in fast fashion is the low prices, which in a certain manner illustrate the democratic outlook of fashion since the second half of the twentieth century (Baldini, op. cit.). On the downside, fast fashion operates on a homogeneous demand logic, assuming that the whole globe is interested in the same aesthetic trends and proposals for fashion, without investing in local characteristics (Campos & Gomez, op. cit.). The demand’s homogenization corroborates with the reduced costs, since companies produce a single clothing item on a large scale for worldwide distribution. Alongside, low prices are driven mostly by low material quality and poor labor conditions of sewers.

In the 21st century important changes have affected the fashion system on a national and international scale regarding competition and differentiation. Factors such as the growing internationalization of commerce, the production shift to Southern Asia, the distribution concentration, the growing brand value and brand image importance, and the industrial fusion of companies in groups and holdings are significant steps in a renovated managerial model for the fashion system. The changes in the system have not only influenced production but, importantly, have also influenced or perhaps been driven by consumer demand. Such alterations have also interfered in the fashion system as a whole, also directly changing product development and the whole set of support services that attend to the fashion industry, which will be exposed hereafter.

2.5 DIFFUSION

Although it is usually expressed linearly, the supply chain involves a series of operations and services that act transversely, often named advance service industries

(Saviolo & Testa, 2015). They are both in the service segment (specialized editors and journalists, material and commercial fairs, advertising agencies, communication agencies, graphic and product design studios, among others) and in the corporative segment (marketing, finance, management, branding, etc.). Clearly other industrial segments also interfere and serve as inputs to the textile-clothing industry, such as information technology (design, patterning and retail software), mechanical engineering (machinery and equipment) and chemistry (fibers and dyes), as affirmed previously in this chapter.

The creation and production of fashion items takes place in the industrial process, involving the material goods industry in the aesthetic and symbolic universes of the cultural industry. Not disregarding the material approach given to the fashion product in this chapter, the present research focuses on the immaterial production of fashion goods and will therefore, from now on, present in detail the most relevant representatives of the advanced service segment such as media, shows and fairs, branding and advertisement, as well as corporate functions.

These functions refer mainly to the diffusion processes of the fashion system, which comprises all communication media that convey fashion information. Such information can be, according to Sant'Anna (2009), direct or indirect, where direct information would consist of announcements of fashion products, while indirect information would most likely propagate habits and values that reverberate the material or immaterial consumption of the new, i.e., fashion consumption. Fashion information, as this work will present in detail in chapter 4, operates by means of symbolic chips within fashion society (ibid.).

One of the fashion information media that receives much attention from fashion system agents and enthusiasts is the runway show. These shows consist of the presentation of the collection to customers, to the media, to opinion leaders and to the general public. They can be divided into two types: (a) image shows or (b) trunk shows. The first type refers to the shows of designers and famous brands, usually in established centers, such as those considered major global fashion cities (Gilbert, 2006), in consecrated fashion weeks. Fashion weeks traditionally occurred five to six months before collections were put in store. More contemporarily, collection launch occurs almost directly after fashion week, in parallel with the previous season's sale. However, with the impulse of invigorating demand, some companies manage to offer the presented collections in stores directly after runway shows – the *see-now-buy-now* format. Brands such as Burberry, Tommy Hilfiger, Ralph Lauren, Coach, Michael Kors, Tom Ford and others invest in a growing category entitled *shoppable runway shows* (Wong, 2016).

International qualified buyers, specialized and general media, and opinion leaders such as famous celebrities visit fashion runway shows twice a year, usually in accordance with the traditional fashion seasons Spring/Summer and Autumn/Winter. Such shows tend to be more beneficial to the company's brand image than having a direct commercial impact. In many cases products presented at runway shows make a

statement about the brands' innovation capabilities and creativity, and are too bold to be commercialized.

The permanence of runway shows is often put into question by authors and agents of the fashion field, due to the high costs they involve. Such events are often considered a pure whimsical stylistic exercise and a media affair without any relation to the commercial reality of brands (Saviolo & Testa, op. cit.). However, runway shows are one of the last strongholds of inventiveness in the fashion system, and they are a benchmark for creativity and the launch of trends for a wide range of companies that are less concerned in creating fashion trends. Such influence is direct or mediated by trend analysis specialists¹².

In contrast to (a) image shows, (b) truck shows comprise smaller events usually allocated to points of sale. In this type of show, end products are exhibited to final customers and have as their end goal the commercialization of products. This is a strategy adopted by retailers in collaboration with producers, selecting a collection sample that is relevant not only to the customer, but also to the producer and the distributor. Merchandisers and product managers may even explain the products or selected looks, fabrics and colors, and present possibilities of combinations between various clothing pieces (ibid).

On the other hand, only agents of the fashion business attend professional fashion fairs, for they constitute a privileged space for doing business and for the launch of new products. Fairs can be either from semi-finished (textile and fabric) or from finished products (clothing items). The semi-finished product fairs host fibers and fabric in interface with garment manufacturers. They happen up to 18 months before end-products are presented in stores for sale. The most important goals of fair visitors are the discovery of new products, the establishment of contacts with potential suppliers and clients, and the seeking of new ideas (Munuera & Ruiz, 1999).

Fairs also work as a reference point for fashion trends, since they are monitored by both trend forecasting agencies and the specialized media (Caldas, op. cit.). They are also the place where companies are able to identify specific sector trends. Many of the fairs themselves are aware of their role in creating coherence, and present trend seminars and specific sectors for *bureaux de style* (Skov, op. cit.). In highly notorious fairs, such as Première Vision (Figure 14), a creative team of the fair organizer selects samples from exhibitors considered interesting and presents them in a designated area. They also keep track and expose the best-selling colors and materials during the fair, contributing to the buyers' collective selection (ibid.), creating a coincidence in the choices of different designers in the field of fashion, as entitled the *conviviality among similars* by Erner (op. cit.).

¹² For example, Promostyl (n.d.) trend books provide "trend updates for each sector including new creative directions, runway overviews and focuses on new products and exhibitions" and WGSN (2016) offers clients "1,300 catwalk shows and 150+ catwalk analysis reports per season".

Regarding trend orientation and adoption, fiber fairs tend to propose first impressions of trends, whereas textile fairs represent the last phase of trend selection and improvement. Like fashion week shows, fairs occur twice a year corresponding to the fashion seasons. The most important fiber and textile fairs are Première Vision, Pitti Filatti, Moda-In, Interstoff, TexWorld, Techtextil, Expofil and Interfilère. It is also necessary to stress that there is a great range of fairs that focus on specific segments, such as sustainable textile fairs - for example, Asia Green Expo - and leather – Lineapelle, in Milan, Italy. In recent years fairs have also grown in quantity and relevance in the Far East, with Shanghaitex an important example.¹³

Finished product fairs also represent the institutionalized encounter between different sectors of the supply chain (Saviolo & Testa, op. cit.). Differently than in fashion weeks and truck shows that are open to the public, clothing fairs intend to unite designers, producers and retailers. In the situation, product prototypes are presented to retailers with the intention of obtaining production orders. As previously stated, many clothing manufacturers produce their products on demand rather than *on spec* (speculation). That is, wholesalers tend to industrially produce their product selection after orders are made, in response to the requests made in commercial fairs based on the prototypes presented – i.e., on demand (Dillon, op. cit.).

Figure 14 Première Vision Paris 2015



Source: Pattern Observer (24 February 2015)

¹³ A good selection of 100 textile and fabric fairs can be found at the address <http://10times.com/top100/textiles-fabrics>. It is, however, hard to find a list that is both an updated and detailed database. Other useful and less selected databases are <http://www.expodatabase.com/international-trade-shows/apparel-fashion-textiles-jewellery/textiles-fabrics-home-textiles/> and <http://tradefairs.fibre2fashion.com/>

Renting a stand at a professional fair is often costly, and wholesalers must be certain that the investment will be profitable. Exhibitors usually study the list of buyers and other exhibitors before deciding to take part in the fair. Such events are mostly interesting for suppliers both when considering the business-volume concentration in the short time a fair takes place, and the contacts made. Fairs are also valuable for benchmarking, studying competitors and public preference. Notorious clothing fairs are Bread & Butter and Prêt à Porter Paris.

Despite the change in the goals and models of fairs, they still receive special attention. In the context of attracting new customers and important contacts, suppliers give extra attention to their stands and displays. The stand project needs to take into account the environment in which products are presented. They must be appropriate to the space of the fair – a situation in which buyers have limited time to select and make their orders – but also attractive and engaging, possibly creating a meaningful brand image in the client's mind. Bold projects have a powerful design, often following various techniques of visual merchandising (ibid.).

As mentioned in the distribution segment, the point of sale is now the contact point between brand and consumer, and the place where the brand strategy is put into action. As part of a communication strategy, it is the place to create and transmit the right atmosphere to the consumer, maintaining a certain coherence on strategic and operational levels (ibid.). Authors such as Sackrider, Guidé & Hervé (2009) and Underhill (2009) explain that at the point of sale the consumer responds to a brand's impressions and information, with the point of sale becoming a *locus* of decision making. Stores intend to evoke experiences of originality and differentiation.

The main goal of visual merchandising can be summarized as the visual attraction of customers to stores. Therefore, the visual merchandiser is one that plans and develops strategies of merchandising, and among the responsibilities there is the development of a creative and artistic concept for stores' interiors and windows. The practice dates from the early 20th Century, when big magazines started investing in scenography and theatrical lighting, creating exotic displays (ibid.). The literature on visual merchandising reinforces the need for emotional seduction and sensibility as well as the relevance of aesthetic influences – which surpass sight and encompass touch, hearing, taste and smell (Underhill, op. cit.).

Besides the emotional factor driven by aesthetic stimulation and experience, visual merchandising is currently approaching fun and amusement. Sackrider, Guidé & Hervé (op. cit.) created the term *retailtainment*, combining the words *retail* and *entertainment*. In this concept the brand is integrated with the consumer, the former stimulating the latter with the intent of amusing her/him, and taking her/him out of hers/his routine. Stores are transformed into consumer universes by originality and differentiation, and the experience at the point of sale is more influential than that made by advertising or marketing.

Despite the effectiveness of visual merchandising applied to the point of sale, advertising cannot be ignored as an important communication strategy. There is a consensus that it is quite particular to promoting fashion and that advertising has a specific reviewed approach when considering the fashion clientele. Fashion communication in general can be internally managed, i.e., big fashion houses have their own artistic or creative director, and stylists that command, among others, the processes of advertising. On the other hand, smaller labels follow the processes led by advertising agencies (Dillon, op. cit.).

Internally or externally coordinated, fashion communication involves a series of heterogeneous actors and types of expertise, from public relations to model casting, from make-up to graphic design. Therefore, fashion communication has a growing demand for managing *ad hoc* collaborators (Saviolo & Testa, op. cit.). From the various institutions, experts and channels involved in fashion communication, the following will be further defined: (a) advertising; (b) public relations and press office; (c) specialized and general media; (d) visual information, i.e., graphic communication and campaigns; and (e) branding.

(a) Fashion advertisement corresponds to the communication of fashion and lifestyle images with the purpose of selling a product or disclosing a brand (Dillon, op. cit.). Advertising is a strategy adopted by almost all different segments, and by companies of all sizes. Independently from market and budget, fashion brands intend to offer consumers a specific lifestyle by means of an attractive history, inciting them to purchase the brand's products (*ibid.*), or to admire the universe proposed by the brand (Gomez, 2010; Gobé, 2002; Kapferer, 2003). In the communication chain, they are often directed by advertising agencies as institutions, and by the art director as the main expert figure.

The process coordinated by the art director can be summarized by the following sequence: the client provides the main information and goals for the campaigns, which will be formalized in the [1] briefing. Afterwards, the art director [2] selects the team of professionals and [3] analyzes the current situation of the brand and market, before proposing a [4] creative strategy and a matching [5] media strategy. The following stage is the [6] creative development, in which both art directors and writers take part. The propositions are to be [7] evaluated and possibly [8] altered until [9] approved. With a selected solution, designers and advertisers [10] develop the final art, which will finally [11] be produced (Saviolo & Testa, op. cit., pp.276-280).

In order to create an advertisement, one must consider aspects such as the target group, their lifestyle, the brand's DNA, and be aware of the concept of the product or season, in order to create a discourse coherence and reach an effective disclosure. In this sense, trend information would also be relevant for creative directors and stylists, but mostly after being filtered by the product manager or head of design, due to the need of proposal convergence. On the other hand, behavioral trend reports influence creative/art directors due to the content of upcoming lifestyles and behavioral trends.

As consumers become aware of trends and are updated, market experts need to stay tuned to the last trends, and orient their customers in an incisive way. Many brands search for new and stimulating ways to attract customers' attention. For example, to celebrate the 150th birthday of the Louis Vuitton brand in 2004, merchandisers placed a huge suitcase close to the shop in Paris (Dillon, op. cit.). Most recently, in cobranding with the film *Zoolander 2*, the Italian brand Valentino invested in a series of unexpected promotions, including actors Ben Stiller and Owen Wilson walking the runway for Paris Fashion Week, and modeling in a Valentino store window in the city of Rome (Figure 15).

Fashion communication in general invests in immaterial approaches, trying to establish a closer relationship with customers. In a wide-ranging sense, this is accomplished through public relations. The activity involves coordinating and following all the brand's public manifestations, from runway shows, product line launches, store openings, special events, and relations with brand ambassadors, important clients and celebrities (Saviolo & Testa, op. cit.) in the material and digital worlds. Public relations intends to promote the brand's identity among consumers, mostly acting through the figures of specialists and opinion leaders.

Figure 15 Zoolander 2 and Valentino



Source: Entretainment (31 January 2016).

Another strategy to acquire and retain customers through media is the press office. Constituted by the press chief and some collaborators, the press office has as its main goal to propose brief statements on the brand, the collections and the products to journalists. Press officers also regularly control the brand's appearance in the media, evaluating quantitatively and qualitatively how, where and how often the brand is exposed. Many fashion brands often outsource the work of public press to agencies. Their goal is to positively influence the brand image in consumers' minds.

As stated, press offices rely on free advertising and free media cover. Therefore, they resort to creative forms of attracting and maintaining public interest. As in other communication fronts, press officers need to produce content coherent with the company's philosophy and brand's identity; regarding not only the content, but also the format, media and context (ibid.). Concerning both public relations and the press office, it is clear that fashion communication involves more than technical formulation. On the contrary, it mostly depends on a strong relational component, highly dependent on the personal knowledge of the representatives and their direct contact with the press. Required abilities are good verbal and visual communication skills, creativity, persistence and persuasion (Dillon, op. cit.), as well as a good network.

The press plays a huge role in the media, and it is the most important communication media of the fashion system (Kawamura, op. cit.; Corbellini, 2015). This large area can be divided into [1] specialized; [2] general; and [3] enthusiast media. [1] Specialized media consists in the activities of journalists and fashion editors. Journalists mostly focus on writing about fashion designers and events. They act mostly as reporters rather than as critics. Critics in fashion, despite playing a notable role, are becoming rather unconventional due to differences between the advertising department and the editorial comment of fashion magazines (Kawamura, op. cit.).

Fashion magazine editors are responsible for selecting fashion trends and clothing. They also develop the activities of advertisers and stylists, and are directly connected to retailers. They are considered to be the pivots of the fashion system, and are credited with sustaining interest in fashion. The press and fashion trade are known to collaborate, combining the industry's supply with the consumers' demands driven by public opinion. In a logic of high exposure, fashion editors have both silence and space as powerful weapons at their disposal, ignoring collections they consider to be bad, while giving additional coverage to preferred designers and ideas (ibid.).

The [2] general media, also referred to as the daily press, has a social function due to its high coverage, readers' loyalty and the visibility of cover pages. With ordinary consumers in mind, this type of press informs content pre-selected by the magazine editorial board, which promotes the selectivity of the content to the reader. However, when considering the overall approach of general media, public selection is still considered heterogeneous (Dillon, op. cit.). The general information on fashion often published in the daily press commonly occupies women's columns, and eventually economics pages, leaving a gap for male fashion.

Both types of journalism present editorials. These are sequences of aesthetic photographs that present a specific dress mood or style, with products presented in an unconventional manner, but with the specification of the designer or brand and price in subtitles. Fashion editorials involve long planning periods and are usually shot two months before their release in the press. The most recognized editorials are printed in fashion magazines, such as *Elle* and *Vogue*. Stylists develop the creation of images for an editorial from a brief, and work with a varied group of people to put their ideas into

practice. For an editorial, this includes art directors, models, hairdressers, make-up artists, designers, photographers, lighting and scenography experts, assistants, and others, depending on the case.

Stylists, specifically, must create a visual style concept and select apparel and accessory items to compose the atmosphere (ibid.). Because they are directed at an enthusiastic public, editorials often present fashion trends to be adopted by and adapted to consumers. Designers' proposals, along with the picks of the magazine's editor-in-chief, are exhibited as the latest stage of trend selection within the fashion system – while considering consumers as a non-institutionalized sphere of the fashion chain. As Kawamura (op. cit.) states in her well-known work on fashion media, editors operate as gatekeepers, detecting innovations and selecting which of them are or are not fashionable, and which of them will or will not endure.

After they have completed their process of selection and evaluation, they engage in a process of dissemination with which they make their choices known. [...] Fashion magazines have an important function to fulfil because they directly serve the interests of the fashion industry. They diffuse ideas to encourage the selling of the latest styles. (Kawamura, op. cit., p.80-81).

Corbellini (op. cit.) considers knowledge on fashion of both actors to be aesthetic rather than critical – more advertising than information, since the fashion pages mostly offer material on trends and images instead of quality, fabric composition and other functional factors. A second negative aspect of such channels is the massive concentration of advertising and product exposure, making magazines highly similar to catalogs (ibid.; Kawamura, op. cit.). The traditional media has been losing space to the enthusiastic media with the popularization of internet. This denotes another stage of fashion's democratization, along with low-cost fashion brands (Ramos-Serrano & Jiménez-Marín, 2014).

Enthusiastic media consists mostly of non-professionals. Often, highly influential early-adopters of fashion trends present their looks and opinions, and adapt trends into their personal style. These communicators started presenting fashion information in informal channels, such as blogs and, more recently, in social networks as Instagram, Facebook and Youtube. The new channels are very valuable when considering fashion media, due to interaction and popularity: four years after its launch, Instagram covered over 300 million users in 2014. Although considered non-professional for presenting an alleged intimate relationship with their followers, many successful digital influencers have made their social appearances and style their profession, by charging extremely high fees for their endorsement of products and services (Abidin, 2015).

Brands also invest directly in communication through social media due to the popularity of such channels. It has also taken celebrity sponsorship to a new level, now that these celebrities themselves have access to the channels and can post their looks. Corbellini (op. cit.) considers the existence of an elite-without-power, referring to the visibility of celebrities, artists and athletes. Brands invest in the power of these celebrities both on a personal level – by giving or lending clothing and accessories – and on a

professional level – through product placement in films and series and their appearance in commercials and campaigns. Based on a contemporary review of the trickle-down theory¹⁴ (ibid.), many fashion companies use famous people to “display” their products, associating the lifestyles of the elite with a specific brand.

In the contemporary market scenario, brands occupy a privileged space. In general brand management literature, there is a consensus that brands are crucial for a competitive advantage that delivers economic returns (Aaker, 1996; Keller, 2003; Leão & Mello, 2009; Persson, 2010). The recognition of brands’ importance has increased, and they are now considered one of a company’s most powerful assets (Dillon, op. cit.; Aaker, op. cit.; Kapferer, op. cit.). Products and services have functional characteristics, but the brand has the ability to broaden the consumer's perspective of a given product and service (Pereira da Silva & Nunes, 2011).

The brand is fundamental to the company’s differentiation, which besides identifying and distinguishing a product also represents and transmits the brand's message and image. Generally and in the fashion market, brands influence the manner by which a product is perceived (Campos, op. cit.; Lee, Leung & Zhang, 2000) and it is rare to establish a value judgment about a *brandless* product. The material and symbolic aspects of a product are more likely to be recognized associatively than separately. This means that the functional and material characteristics of products are imperatively associated with abstract and symbolic aspects, often provided by brand communication. In the context of branding, one can consider that communication processes take a fortunate part in the processes of branding, because branding is mainly a communication process, and a brand does not exist by itself.

In the contemporary context of the fashion system, material products – mainly clothes – operate as exchange elements, acting as physical and marketable supports for the imaginary projections of brands. The main communication strategy of fashion companies is to overcome the products, communicating an implicit lifestyle that enables the brand’s identification. In the changing sphere of fashion products, brands are recognized by their permanent and constant aspects (Corbellini, op. cit.). Product design and development also consist of design and brand management, because products express and materialize the brand concept (Campos, op. cit.).

Brands are considered similar to a company’s reputation, since they are an intangible heritage configured as a positive or negative mental image of an organization, service or product (Tybout & Calkins, 2006). It is a complex system that encompasses various forms of expression, and which gives products and the company an identity and a set of values, identifying and differentiating them from competitors. Some refer to the metaphor of the DNA (Gomez & Mateus, 2009, Gomez et. al., 2011; Olhats, 2012; Braun et. al, 2014). New theoretical and practical lines start to consider the emotional attributes of a brand, surpassing the ideas of identity and differentiation. The emotional

¹⁴ See chapter 3, item 3.4.1 of this work.

characteristics of brands affect and mobilize customers (Kapferer, op. cit.; Tybout & Calkins, op. cit.; Gobé, 2010; Pereira da Silva & Nunes, op. cit.; Lindstrom, 2012).

The brand image is a set of mental attributes developed within consumers' minds in their memories (Costa, 2008, Keller, op. cit.). It constitutes a symbolic-affective narrative of the experiences occurring in interaction with the brand. This mental image arises from all types of situations, and is associated with the company or product. Because it often exchanges with previous memories and the internalization of the brand's expressions, brand image cannot be fully controlled by designers, advertisers and brand managers. The controlled part is rather addressed as brand communication, and involves, beyond those already mentioned, materials such as logotypes, look books, websites, catalogs, corporate magazines, blog posts, post-cards, packaging and other promotional materials (Dillon, op. cit.; Corbellini, op. cit.).

Brand communication of fashion companies invests mostly in a more ludic and less argumentative approach, aiming to establish emotional attachment and attract consumers. It invests in lifestyles and stories that consumers can relate to (Corbellini, op. cit.) or look up to (Freling & Dacin, 2010). The link should be established at various levels. Companies manage to organize a cohesive message conveyed through advertising campaigns and other communications, through the service at the point of sale, through the shopping experience and, unquestionably, through the aesthetic, symbolic and functional quality of products and services, with the goal of emphasizing positive experiences related to the brand.

Another matter to consider when forming brand image in the field of fashion is the need to equalize a long-lasting brand heritage and style with volatile fashion trends. To blindly follow all fashion trends would be to neglect the history of the company. On the other hand, to rely only on traditional values of a company or brand would be to neglect the developments of the market and the demand. In general, trends are the main forces that drive the business of fashion. Companies that investigate fashion trends have acquired high visibility and reliability from the different actors throughout the fashion system.

The *bureaux de style*, i.e. fashion trend forecasting companies, have institutionalized fashion trend prediction, and until today play a central role within the industrial and commercial organization of fashion. Trend forecasting agencies are considered fundamental for the coordination of the chain, and for the inspiration of designers and other creators. The traditional *bureaux* date from the 1960s and would spread trend information up to two years in advance in printed *cahiers de tendances* – traditional fashion trend books – with instructions on color, shape and proportion, print, finishings and inspiration for product development.

Bureaux de style usually employ a group of various researchers, such as sociologists, designers, creative directors and technical experts that often rely on a network of opinion leaders and early-adopters with the goal of identifying, analyzing and translating trends to the fashion segment. Brands and designers rely on trend forecasting

agencies mostly due to the traditional and widespread concept of anticipation in fashion production. In the business there is an ongoing belief that without carefully planned forecasts, retailers would probably lose money by producing items that would not sell. Fashion trend forecasters set the context of coordination between supply and demand.

Fashion trend forecasters influence the whole chain of trendiness and taste in fashion products, either directly or indirectly (Figure 16). The *bureaux* and trend experts are seen to formalize the process of anticipation, using different methodologies and tools to analyze technical and aesthetical fields, such as technology, the market and different materials (Saviolo & Testa, op. cit.). They provide precise directions, specialized in business segments, for example: formal menswear, formal womenswear, casual menswear and womenswear, sportswear, childrenswear, beachwear, lingerie, accessories, beauty, etc. The information conveyed by the agencies comprise inspirational aspects and product-directed proposals (Style-right, 2016).

Figure 16 Cycle of fashion trends



Source: Dillon (op. cit., p.30)

Despite the growing influence of internet portals, many of the *bureaux de style* that maintain their printed editions remain strong. The main subjects of this dissertation – the different fashion trend agencies and media – will be presented and further analyzed as expert systems in chapter 4. For the moment, it was relevant to set the *bureaux de style* in the general context of the fashion system, and to present their connections mainly with fashion design companies. Already addressing the main topic of this dissertation, the next chapter will, in turn, clarify the object of study of trend forecasting companies: fashion trends.

3. FASHION TRENDS

Names given to children¹⁵, adherence to certain scientific theories, the preference for 4X4 trucks, the world's recent *gourmetization*, and the aesthetic changes that renew the wardrobes of *fashionistas*¹⁶ and ordinary people are phenomena dictated by the logic of trend. The literature of the field insists that the meaning of the term has been emptied, and it is no surprise that there is uncertainty regarding the definition of what a trend is, considering that it is quite a popular term in contemporary culture, and it affects individuals, companies, and society as a whole (Caldas, op. cit.; Vejlgard, 2008).

Colloquially, trends are associated with the ideas of fashion and novelty, and with the ideas of anticipation and uncertainty. Clearly, trends are consubstantial to the idea of fashion (Mocho, 2012). They appear widely and are considered by readers to be the most interesting content of fashion magazines (Bailey & Seock, 2010). However, the fashion ethos and system has adapted the original idea of a trend (more specifically, tendency) to its peculiarities, involving the concept in the ideas of volatility, ephemerality, and renewal.

The English language presents two different words for *trend* and *tendency*, which does not occur in other languages, such as Portuguese and German. The differentiation usually defines *trend* in relationship to the idea of ephemeral novelty and fashion, whereas the noun *tendency* maintains associations with areas such as Statistics and Psychology, referring to a longstanding inclination and predisposition. On the other hand, the use of both words as equivalents causes a great part of the misunderstandings and connotation wastage when it comes to the comprehension of such phenomena.

Although considered synonyms, each word presents particularities and, therefore, specific associations. The general idea that unites both concepts consists of the meanings of direction, extension and inclination (Collins, 2012). The ordinary concept of tendency implies, however, that the vector or direction will most likely be achieved, comprising something that tends to grow and become standard. On the contrary, a trend – more specifically a fashion trend – will rarely standardize, for as a characteristic of fashion as ethos, the wide adoption empties the symbolic meaning of novelty. Similarly to what presently occurs with the term *design*, the word *trend* was extensively used during the 1990s and 2000s, and forcedly associated with products and services as an argument, qualification, or legitimation. Such a situation, combined with fast fashion

¹⁵ See study conducted by Lieberman, S. (2000). *A matter of taste: How names, fashions, and culture change*. New Haven: Yale University Press; also reported by Godart, F. (2010). *Sociologie de la mode*. [Sociology of Fashion] Paris, La Découverte.

¹⁶ According to the Urban Dictionary (2014), *fashionista* is a term utilized to refer to women (also eventually applied to men) devoted to fashion and clothing. These women have “a natural flair for combining both current and vintage fashionable trends”. Although the term has had negative connotations in the past, contemporary society considers it a positive attribute that defines people with enthusiasm for fashion. See more at: <http://www.urbandictionary.com/define.php?term=fashionista>.

logic, has led to a context in which trends are often perceived as negative, referring to mere aesthetic alterations, without any reference or background. Many people disfavor trends, considering them to be followed by the masses, in opposition to the expression of one's own individuality, as defined by the never-ending search of a “newer new” with the goal of social differentiation (Esposito, 2014).

Trends are phenomena that concern taste and style. According to Erner (op. cit.) and Lipovetsky (op. cit.), they are convergences of desires and taste, characterized by cycles of varying duration and rapid modifications. Despite the fact that quick renewals respond directly to the fashion industry's interests – translated into profit –, every trend involves two spheres: [a] an arbitrary cultural sphere and [b] a commercial economic sphere. Hence, this discussion on the concept of trends also regards the questions: What are the causes behind the renovation? If the renewal overcomes the endogenous (as in inside the industry interests) forces, what are the exogenous forces behind the changes? How do these forces operate?

This chapter seeks to clarify those and other questions, such as the meaning and the attributes of a trend and, more specifically to address the subject of this dissertation, fashion trends. Firstly, the etymological comprehension¹⁷ of the term is presented with the intent to apprehend its origin, before undertaking to understand the history of its meaning (3.2) from its origin to the present day. Thereafter, this chapter addresses the various terminologies of trends, the convergences and divergences of terms, and the basis for such definitions. Fashion trends' dynamics, diffusion logic, and driving forces will also be discussed in the following pages.

The explanations, theories, and examples of this chapter mostly relate to the fashion industry – in this scope considered as the apparel and clothing industry. Despite the fact that many of the presented theories originate from the fields of Sociology and Communication, and often refer to innovation and information, I reviewed them focusing on fashion trends. For that reason, the term *fashion trend* was adopted. There are a vast number of acknowledged theories relating to trends and fashion trends that do not comprise the literature foundation of this chapter, which deliberately presents only those considered relevant to address the scope of the dissertation.

3.1 ETYMOLOGY

Etymologic research was conducted firstly in the Portuguese language, since that is the author's native language and, therefore, the language in which the greater part of this research into fashion trends was conducted. Subsequently, the dissertation presents etymologic research conducted in the German language – due to the second location of the binational Ph.D. – and lastly, in the English language, which is the language in which

¹⁷ Etymology is the study of the composition and origin of words, and their meaning throughout history.

this dissertation is written. Other languages, such as French, contributed to the formulation of the word in the studied languages.

In Portuguese, the word *tendência* has the meaning of inclination, propensity, disposition, intention, movement, and determining force (Buarque-de-Hollanda, 1999). The derivation of the Latin adjective *tendente* created from the verb *tendere* formed the word *tendência* (Machado, 2003). In Latin, the vocable *tendō* corresponds to the meanings of [1] to extend; [2] to submit an offer; and [3] to proceed, resume or continue. In a figurative connotation, the term corresponds to the actions of tending and leaning towards (Faria, 1962). Such a connotation also relates to an Indo-Germanic root, *ten(d)*, whose meaning encircles the idea of extending, stretching, and spanning (Pokorny, 1959).

In German, the word tendency (*Tendenz*) is a feminine noun variant of the French term *tendance*, with the definition of direction (*Richtung*) and propensity (*Neigung*). Also as a reference, the French word *tendre* implies the meanings of stretching, expanding and extending. The Latin term *tendere*, which also corresponds to the route of the Portuguese word, reinforces the concepts of spread and elongation. Commonly, the word *Tendenz* is associated with the word *Streben*: yearning, longing, striving to achieve something (Köbler, 1995).

The word *tendency* in the English language dates from 1620 and originates from the Medieval Latin term *tendentia*, varying from the Latin term *tendere*, mentioned above. The word *tendency* refers to the Old French word *tendre*, likewise a version with Latin roots (Collins, op. cit.). However, the term *trend* is used with greater recurrence. In this case, the word refers to the term *trendan* of the Old English, whose meaning refers to the verb *to turn*. According to Lindkvist (2010), the Northern European word *tendr* corresponds to the term, describing the course of a river or maritime currents.

In summary, the words *trend* and *tendency* aggregate the ideas of propensity, inclination, growth, expansion, driven movement. In addition, due to the English and German understandings, the term has connotations of movement and something to be achieved, indicating a relational condition, and suggesting the existence of an end. Based on those meanings, the semantic concept of *trend* rests on three main pillars: [1] otherness, in the sense that a trend exists upon an external force that attracts or leads it; [2] movement, identifiable in the ideas of inclination and propensity; [3] coverage, reporting on the meanings to extend, expand, and unfold (Caldas, op. cit.).

Therefore, a trend (in the general sense of the word) is the predisposed inclination towards something, someone or some situation likely to happen in the near future. Having a final attractive force, the general idea of a trend is something that tends to reach this otherness, and therefore, the idea of a trend presents a sense of finitude; i.e., a situation that will be achieved; and futurology; i.e., suggesting that the situation will happen in the future. The relationship of *trend* with the concept of propensity also involves the consideration of uncertainty: although the situation is likely to happen, it has not yet happened, and there is no assurance that its course will not change.

Of course, the ideas associated with the term have varied throughout time, as well as the scientific paradigm in vogue, and the situation and aim of what it was used. In order to identify how the original connotations and meanings acquired their current configuration, a historic bibliographical study was conducted, of which a summarized report will be presented in the following pages. The goal is to elucidate how the first connotation of the term, used as romantic inclination during the Middle Ages, was altered to the current meaning and gave birth of a vast range of related terms, such as *trendy* and *trendsetter*, which date from the 1960s (Collins, op. cit.).

3.2 HISTORY

Historically, the first usage of the word *tendency* occurred in France during the Low Middle Ages, more specifically the thirteenth century. The term was uttered with the connotation of inclination. However, one would apply it to suggest a romantic inclination to another, as a manifestation of romantic love, which characterized the period of the rise of the bourgeoisie (Caldas, op. cit.; Sant'anna, op. cit.). The meaning reinforces the sense of otherness, for it requires an external element, that is, something or someone who causes the attraction.

The word *tendency* was rarely used until the eighteenth century, when recaptured by science with the meaning of strength in a specific direction, tending to an end, dynamism, effort, and impulse. It was due to the time, during the Enlightenment, French Revolution, and the encyclopedia, that the concept of tendency adopted one of its most recurrent associations: finiteness, a movement that expends itself. During the same period, the area of Physics consolidated the meaning of trend, corresponding to attraction and force, which is used by physicists and other scientists to the present day (Caldas, op. cit.).

Conversely, the word *tendency* reached considerable propagation only after the nineteenth century, when psychologists started employing it in the plural form – *tendencies* – in the sense of propensity or predisposition of a certain individual in acting in a certain manner; his or her particular modalities of desire and orientation of individual needs. Under this prerogative, psychologists added a crucial signification to the contemporary meaning: pointed direction that will not necessarily or completely be reached or fulfilled (Caldas, op. cit.). Such an idea is central to the associations of uncertainty that are emblematic of the study, research, and adoption of trends – and evidently, fashion trends.

It was also during the nineteenth century that the word acquired its evolutionary connotation, and which, for many, seems intrinsic to the notion of a tendency or trend. Contemporaneously to the Industrial Revolution, the enrichment of European potency and Positivism, the meaning of *tendency* assimilated the implications of progress and evolution, suggesting that history treads a straight and direct path to an inexorable fate (ibid). The positivist doctrine sustained by Comte grounds the current understanding of

the concept of *tendency* – and, as a consequence, of *trend*. One notices such associations in the contemporary affirmations of William Gibson (2003), who states: “The future is already here –it’s just not evenly distributed”, and of Florence Müller (2012), who considers the history of trends is the evolution of practices.

Also in the nineteenth century, with the growing popularity of statistics¹⁸, the word *tendency* began to be associated with mass and demographic movements and data, widely used by the traditional fields of sociology and nature sciences. For the greater part of the twentieth century, economists and statisticians would use the word in relation to the findings of their research. In such scientific fields, a tendency is the direction a certain curve takes on a graph. Statisticians commonly apply the word *tendency* when the direction of a curve is not completely evident (Vejlgaard, op. cit.). It is noteworthy that the concepts of stretching results, broadly used in statistics, echo the meanings of the words *tendency* and *trend*, and the practice of trend studies.

In the twentieth century, the first record of the word *trend* to designate an object in the field of design is from the year 1936, in the pages of a magazine which itself was entitled *Trend*. The *DIA – Design and Industrial Association* established in 1915 – edited the magazine. The English Association had similar goals to the *Deutscher Werkbund* (German Association of Craftsmen) formed in 1907: to promulgate cohesion among designers, producers, industries, dealers, and retailers; as well as a better understanding of what should be perceived as good design by the public, regarding design items for the household and daily routine (Monçores, 2013a).

Between 1946 and 1975 trends acquired a comprehension similar to their current meaning, emphasizing their economic relevance. Their emergence in this scenario coincides not arbitrarily with the birth of mass consumption, which inaugurated a period designated as “The Glorious Thirty”, in allusion to its duration. It is evident that the objective of advances in industry and productivity were and are concerned with programming continually renewed income (Erner, op. cit.). The fashion industry adopted an institutionalized and edited form of trends only in the last third of the twentieth century. However, from then on, the interest in trends is an indissoluble part of people’s lives (Vejlgaard, op. cit.).

Individuals were avid for novelties, and the optimized industrial system had the ability to provide them. With “innovation” as the main engine of the system, the contemporary term *planned obsolescence* replaced *creative destruction*, a concept of the 1980s. Trends, with a specific focus on fashion trends, occupy a central place in society and the economy because they solve the contradictions of capitalism: to produce the

¹⁸ The scope of statistics increased in the early nineteenth century to include accumulation and general data analysis. Today, statistics is widely applied in the natural and social sciences, including public and private administration. Its mathematical foundations were laid in the seventeenth century with the development of probability theory by Pascal and Fermat, and the least squares method described by Carl Friedrich Gauss in ca. 1794.

same consumer good without interruption (Erner, op. cit.). By producing limited quantities of certain products in a series, industries introduced innovation in every series of product, encouraging consumers to renew their goods; i.e., every new offer has possible demand.

The presentation of the etymology of the term *trend*, and its use throughout history, is intended to clarify the concepts *trend* and *tendency*, and how they were shaped over time by diverse scientific paradigms. From various sources, the general concept of the word *tendency* absorbed the meaning of strength, or vector that leads to a finite future that is its goal, but whose reach is uncertain. More specifically relevant to the present study, the contemporary connotation of *trend* conjoins three main historic and economic factors: [1] the sprouting of a fashion ethos and the rise of the bourgeoisie in the later Middle Ages, which valued change, novelty, and renewal; [2] mass production in the early twentieth century, after the Industrial Revolution; and [3] the possibility of access to consumer goods for a great portion of the population.

Related to the market dynamic, this concept currently comprises aesthetic novelties mostly adopted by products, which the population will consume in the future, serving as artifacts of the coordination between supply and demand. The historic literature produced about the constant change phenomenon – referring to a period when fashion trends were not yet institutionalized – often uses the terminology *fashions*. When considering fashions, authors deal specifically with changes elapsed due to the taste for change. However, trends are not necessarily fashion trends, and do not always involve economic interest. The association between trends and fashion is explained by, among other reasons, the perception of the accelerated pace with which changes occur in the world of clothes, accessories, and hairstyles.

As market strategies, trends also refer to a sociocultural background, even in cases when the sociocultural explanation for the trend lies behind the desire and recurrence of change (Svendsen, op.cit.). Trends consist of changes and transformations that involve different aspects of social, cultural, individual, and aesthetic spheres. Such transformations are accepted as positive due to the logic of ordination, renovation, and normalization of change grounded on the fashion ethos, which surpasses the boundaries of the fashion production, communication, and consumption system. Trends can be self-legitimated changes, but they accord more or less with the spirit of the time.¹⁹ In turn, fashion trends are expressions of trends – which are socioculturally grounded – in aesthetic spheres, mostly by means of visual and haptic characteristics applied to clothing and apparel products.

The possibility of applying trends to products derives from the possibility of prognosticating trends. Trend studies, trend forecasting, and future studies relate to

¹⁹ This issue will be precisely addressed in item 3.6 of this doctoral dissertation.

practices of study, analysis, and conjecture of future scenarios (Petermann, op. cit.). Since trend indexes and evidence can be observable, trends studies aim to identify influences, interpreting how a trend is transformed and adopted in order to understand and foretell its consequences. Therefore, different types of industries and sectors base their decisions on trend reports and consultation.

In the field of design, trends are used to improve the development, innovation, and sensorial attraction of products, i.e. through aesthetics (Buck, Hermann & Lubkowitz, 1998). Many companies are actively involved with trend research and adoption, whereas others perceive trends more sceptically. The different approaches reflect different concepts of trends. If one understands trends only as short-term symptoms of a fashionable nature, then it is reasonable that product manufacturers and businessmen tend to avoid trends. However, a broader understanding relates trends to market-related changes, with a sufficient spectrum of activity and entrepreneurial relevance. In this sense, the elementary concerns of trends are all related to economic processes (ibid., p.39).

The different comprehensions of trend also reflect two main varieties of trends: more general sociocultural trends and more product-directed trends. Trend forecasting mostly consists of identifying major behavior and social trends – under the name *macro trends* – and adapting them into creative product and service directions – which receive the terminology *micro trends*.

3.3 TERMINOLOGIES

The contemporary connotation of *trend* points to a wide range of synonyms, specifications, and terminologies. *Fashion, micro trend, macro trend, mega trend, wave, gimmick, fad, craze* and *trends of short, medium, or long term* are some examples. The variety of terms elucidates that in scientific studies and in the professional market, there is little coherence in the use of terminologies for different trend categories. That drives to confusion and compromises concordance within the fashion sector and the academy. In addition, the classifying parameters are various, arbitrary, and combine aspects that are not directly proportional, such as speed and breadth of dissemination (Erner, op. cit.).

The bellow chart (Chart 3) was developed with the purpose of systematizing the diverse categories used to refer to a fashion trend. Moreover, it allows for visualization of the terminologies' plurality, and the possible conflict and divergence among the groups of terms. The data organization also enables the identification of convergences and equivalences within the range of expressions. However, due to the wide recurrence of the terms *macro* and *micro trends* in the fashion industry and market, those terms will be presented with a more specific definition, since they will henceforth be adopted by this doctoral dissertation.

Chart 3 Systematization of terminologies applied to the study of trends

Publication/author	Parameter	Categories
Erner, G.(2012) Sociology of trends	Adoption broadness Relationship of belonging or distinction	Confidential trends Massive trends
Riezu, M,(2009) Coolhunting	Endurance (life cycle) Impact potential Adoption broadness Need or whim	Trends Fads or hypes
Godart, F.(2010) Sociology of fashion	Endurance (life cycle) Adoption broadness Diffusion	Fashions Enthusiasms
Kotler, P. & Keller, K.(2006) Marketing Management	Endurance (life cycle) Impact potential Predictability Sociocultural ground	Wave Fashion Sociocultural trend
Solomon, M. (2008) Consumer Behavior	Endurance (life cycle) Impact potential	Fad Fashion Classic
Buck, Hermann & Lubkowitz (1998) Handbuch Trendmanagement	Endurance (life cycle) Impact potential	Short-living trend Long-lasting trend Classic Fashionable phenomena
McCracken, G.(2011). Chief Culture Officer	Endurance (life cycle) Impact potential Adoption broadness Sociocultural ground	Fast culture Slow culture
Caldas, D. (2004) Observatório de sinais	Endurance (life cycle) Sociocultural ground	Backdrop trends Short-term trends
Lipovetsky, G. (2012) Qu'est-ce qu'une tendance?	Sociocultural ground Arbitrariness	Light trends Heavy trends
Baldini, M,(2006) The invention of fashion	Endurance (life cycle) Impact potential Adoption broadness	Costume Fashion Fad Craze
Naisbitt, J.; Aburdene, P.(1991) Megatrends 2000	Impact potential Sociocultural ground	Megatrends
Rehn, A. & Lindkvist, M.(2013) Trendspotting	Endurance (life cycle) Impact potential	Microtrends Macrotrends Megatrends Gigatrends
Hill, S.(2003) 60 trends in 60 minutes	Endurance (life cycle) Impact potential	Fads Fashions History

Source: author

Rejecting the separation between different trend profiles, Erner (ibid.) presents a distinction between [a] *confidential* and [b] *massive trends*. *Confidential trends* designate belonging to a specific group, whereas *massive trends* usually attend to a great number of individuals. To the French professor and researcher, to comprehend the point of convergence between *confidential* and *massive trends* is a complex task because the

former invests in distinction of individuals and groups, while the latter enables integration in the social field. However, it is worth noting that the difference between both categories can disappear, since a *massive trend* is always a successful *confidential trend*.

In the scope of what is designated *coolhunting*²⁰, the forecaster Riezu (2009) presents only two categories when considering different types of trends. For her, one may distinguish a [a] *trend* from a [b] *fad* – a term in English that resembles a novelty, fantasy, furor, or mania. Within the market, a *trend* lasts around five years. That may mean that in order to be maintained valid, this trend suffers minor alterations. Meanwhile, *fads* have a much shorter life cycle. Being extremely volatile, they affect a limited group of people and have little potential to reach a substantial impact.

Accordingly, in order to apprehend the distinction one needs to ask the following three questions: [1] “who is behind this trend?”, which refers to the broadness factor; [2] “what are the possibilities for this trend to become mainstream?”, referencing the impact potential factor; and [3] “does it appear in more than one place?”, regarding again the adoption broadness, this time by the industry (ibid.). The author lists another category difference factor – besides endurance, broadness, and impact potential – by presenting the possibility of distinguishing a *trend* from a *fad*: the satisfaction of a need or a whim.

The consideration that trends fulfill needs whereas fads satisfy merely whims – a proposition that, in a certain way is shared by some trend forecasting agencies – is highly questionable, especially when using the terms as parameters for trend categorization. One of the critical points is the nonexistence of a proper conceptualization by the authors for not only the term *need* – which mostly still relies on the pyramid developed by Maslow in 1968 – but also for the term *whim* – which carries a strong pejorative connotation. The systematization proposed by Riezu ignores the category of desire,²¹ which is important to consider in explaining the frequent changes in fashion.

Godart (op. cit.) presents, once more, only two trend categories: [a] *fashions* and [b] *enthusiasms*. For him, *fashions* are more durable and structured changes spread by different social diffusion mechanisms. *Enthusiasms*, however, constitute a diverse phenomenon. The French sociologist states that the term *enthusiasm* corresponds to *fad* – which is applied by Riezu – and comprises subtle popularity and short endurance. While specific social mechanisms rule the logic of *fashions*, the logic of *enthusiasms* is random. The use of the choker necklace, significantly adopted by young women in during the year of 2016, can be considered an example of *enthusiasm* (Figure 17).

²⁰ Coolhunting is one of the many possible approaches to trend forecasting. Coming from marketing, it involves the observation of clothing, new lifestyles, films, music, art, and politics and usually focuses on youth. The lack of a method or empiricism and the superficial and more immediate approach is questioned by other trend researchers, such as the American sociologist Grant McCracker (2011).

²¹ On the topic of fashion, change, and desire, further information can be found in the book Meinhold, R. (2013). *Fashion myths: a cultural critique*. Transcript: Wetzlar.

Figure 17 Choker necklace



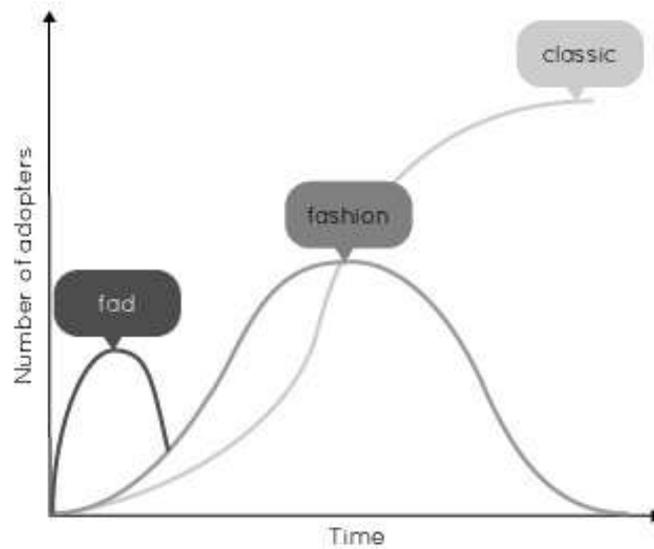
Source: Harper's Bazaar (2016)

Kottler & Keller (2006) distinguish [a] *waves*, [b] *fashions*, and [c] *sociocultural trends*. The categorization criteria mostly count on the endurance, predictability, and social, economic, and politic impact of trends. Therefore, a *wave* is an unpredictable, low-impact and low-endurance phenomenon. Other characteristics of *waves* are rapid diffusion and, consequently, rapid disappearance. The concept in some way corroborates the concepts of *fad* and *enthusiasm*. On the other hand, a *fashion* presents longer, more lasting, and more consistent reach. Lastly, a *sociocultural trend* indicates a more stable and long acceptance cycle, which also causes a more substantial sociopolitical and economic impact.

Similarly, Solomon (2008) present a distinction among a [a] *fad*, a [b] *fashion*, and a [c] *classic* as trend categories, synthesizing them by their relationship with time – main criteria – in the following figure (Figure 18). The endurance of a *fad* equals of the lifecycle of a *fad* product. A [d] *wave* lasts almost three times as much, around five whole years. Last of all, a *classic* affects a great number of people for a much more extensive time period, even generating behavioral and social change.

The German trend forecasters Buck, Hermann & Lubkowitz (op.cit.) also express graphically different typologies of trends. Considering a trend threshold, the model represents four different possible paths (Figure 19). [a] *Short-living trends* – tend to course the shortest path. A [b] *long-living trend*, even if applied to a product, takes the longest before losing its novelty value. They also consider the possibility of a trend lasting a long time in the market, and stabilizing as [c] a new standard. The last curve represents the authors' idea of [d] *fashions*. Considering the cyclical nature of fashion trends and media themes, the movement coursed is sinuous, varying between ups and downs, according to degeneration phases.

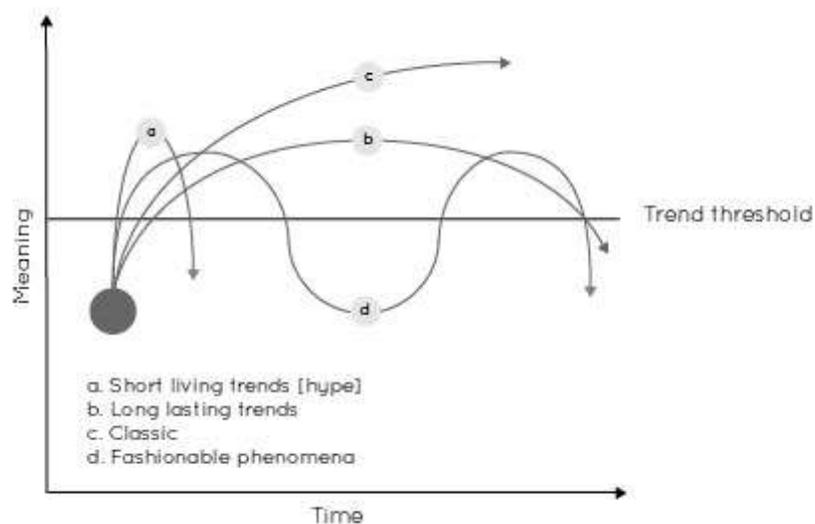
Figure 18 Comparison of the acceptance cycles of fads, fashions and classics



Source: Solomon (op. cit., p.34)

The American anthropologist Grant McCracken (2011) presents only two trend categories that also consider the meaning of the trends. He created the differentiation between [a] *fast* and [b] *slow culture* without explicitly using the word *trend*, although this was strongly implied. His systemization, although not presenting the trend nomenclature, is representative of trends of major and minor impact, and is especially relevant when considering that culture is one of the decisive aspects of change occurring in, and absorbed by, a society. The *fast culture* indicates the most evident, perceptible, and ephemeral changes, as the term itself suggests. Conversely, *slow culture* is in the background and never the center of attention (ibid.). It consists of what lies underneath the surface, and is therefore less evident, less charted, and also harder to map.

Figure 19 Typical development of trends



Source: translated and edited from Buck, Hermann & Lubkowitz (op.cit., p.67)

The Brazilian sociologist and trend researcher Dario Caldas (op. cit.) defends a similar division. For him, [a] *background trends* influence social aspects of life and endure longer, where [b] *short-term trends* have a transient influence and are colloquially designated fashion phenomena. Usually *background trends* influence different series of *short-term trends*, which are more volatile and fragile and usually influence product through aesthetic and conceptual directions. For example, while a background trend may prescribe a multi-faceted subject or a fragmented individuality (Figure 20), a short-term trend may present design products with an assembly of contrasting elements (Figure 21).

Figure 20 Trend panel “Personas Ambulantes”



Source: Laboratório Futuro do presente (2013)

Figure 21 Crystal and pipe chandelier



Source: Michael McHale (2014)

Gilles Lipovetsky also proposes two categories of trends, which he entitles [a] *light* and [b] *heavy* trends (in French, *tendances légères* and *tendances lourdes*). For the French philosopher, [a] *light trends* are movements that usually comprehend part of the cultural arbitrariness and register in a commercial logic. They are abrupt and agile, and they reflect vogues and passions. On the other hand, a [b] *heavy* trend consists in a real change with social meaning, coherence, and rationality. *Heavy* trends last longer in social and economic spheres, for example: the marriage age increase and religious practices (Lipovetsky, 2012).

Specifically focusing on the clothing sector, the Italian Massimo Baldini (op. cit.) differentiates four categories of what he considers the elementary lexicon of fashion. The [1] *costume* is the dress – or, one may add, any phenomena – that does not suffer modifications. It corresponds to what is normative, the standard. In modern societies, costume relates to tradition. In clothing, *costume* relates to traditional and folkloric dress. The second category is [2] *fashion*: the predominant style of a certain time and, hence, limited to a period. Baldini also considers a [3] *fad* as a mental epidemic or a perishable *fashion* that lasts only a few weeks, and which reaches a limited number of people. Nonetheless, a [4] *craze*, which resembles a *fad* in speed and limited scope, has as its main features exaggeration and sharp eccentricity (ibid.).

There are also discussions concerning the difference between sociocultural and behavior trends and fashion trends, which are already interpreted as specific market segments. This contrast has influenced the designation of the present research, since trend forecasting usually consists of fashion trends' research and product direction. The most persistent categorization within the market itself is the distinction concerning *macro* and *micro trends*, hence, this nomenclature is to be adopted in this doctoral dissertation. However, since every researcher is free to create her/his own classification, another plurality of terms arises, creating a broader scope to the *macro trend* and *micro trend* duality. In the following pages, the differences between *macro trends* and *micro trends* will be presented, and satellite concepts, such as *mega*, *giga* and *nano* trend will be briefly described.

3.3.1 Macro trends

Macro trends last from one to two decades and cover economic, political, and technological changes. They are extremely impactful in different sectors, and important in the construction of new scenarios. *Macro trends* can be sociocultural movements or changes that influence society for long time. A *macro trend* results in deep cultural changes in society. Its main parameter is the impact potential, since *macro trends* have repercussions on the lifestyle of the social order, mostly by orienting the tastes and preferences of consumers. These long-lasting and highly impactful trends are subject to identification and investment from the moment they 'germinate' until they reach full market acceptance.

Authors who are more evidently market focused, such as Mozota (op. cit.), Gimeno (op. cit.) and McCracken (op. cit.), consider trend research and product direction to be strategic to many sectors, including the fashion industry. They are relevant not only for the strategic plan, but also to the building of future scenarios, long or short-term. As presented in the previous pages, Caldas describes *macro trends* under the denomination of *background trends*. In an interview with Dornelles (2007), he declared that *macro trends* are strategic for the identification of new spaces and opportunities for business, because they reverberate sociocultural movements, and possess a more enduring impact on culture, consumption, and behavior.

Figure 22 Lookbook Oysho Homewear



Source: Oysho (2014)

For example, figure 22 presents the campaign of Oysho® – from the Spanish textile group Inditex® – which attends to the *loungewear* or *homewear* sectors: literally fashion to wear at home. The proposal of a new market sector for the brand positioning directly addresses the *macro trend Cocooning*, proposed by the futurologist Faith Popcorn already in the 1990s. The trend expresses the desire of individuals to stay home and socialize digitally, i.e., not personally. The trend grew with the rise of the internet and other technologies that allow people to minimize leaving the home, such as delivery services, home office, and home theater, etc.

In order to apply *macro trends* strategically, researchers and scholars recommend that one should analyze them in their context, charting their course and measuring their strength in a specific period. Because they are deep and impactful transformations, it is fundamental to investigate unities of behavior and social conduct, mostly in the fields of sociopolitics, culture, behavior, and lifestyle, as well as in the fields of art, economy, architecture, design, and gastronomy. All these different areas should be of interest because one of the parameters for a *macro trend* evaluation is its impact on fluxes and structures of society (Zanettini, 2012).

Using the term *mega trend*, Naisbitt & Aburdene (1991) suggest that they are wide, not always evident, and usually last two decades – which corroborates with the characteristics of a *macro trend*. Yet, Lindkvist (op. cit.) presents *mega trend* as an additional category that refers to an endurance longer than two decades. The Sweden researcher, also add the category *giga trend* to the scope, referring to an even bigger trend.

In Lindkvist's recent book written with Rehn, they declare it to be hard to define what a *giga trend* is. Some consider it to last five or more decades; others rather focus on broadness, stating that a *giga trend* is so general that it affects almost all scopes of society, surpassing the boundaries of one or two industries. In summary, trend researchers see the following gradation: "when a *macro trend* in a segment of an industry starts affecting the entire industry, it becomes a *mega trend*, and when it spans several industries and other aspects of society, it's a *giga trend*." (Rehn & Lindkvist, 2013, pp.13-14).

3.3.2 Micro trends

Micro trends, on the other hand, are phenomena of an inferior endurance – from one to five years – as compared to *macro trends*, also reaching inferior broadness or width. They are highly representative of the volatility of the contemporary, have a minor scale influence and, likewise, inferior intensity force (Zanettini, op. cit.). *Micro trends* are observable and relate to small and perceptible changes that occur on a daily-basis around us: what we wear, what we would rather eat, what topics we would rather have a conversation about, and even the words and vocabulary we use.

An example of a *micro trend* is the named *athleisure*, i.e., the use of sportstyle clothing as regular leisure clothing, due to its comfort and the indication of a healthy and relaxed lifestyle. It combines the demands of the current fast-paced lifestyle, combining functionality and style. The *micro trend* in fashion is also related to the fitness trend since 2010, but more incisively since 2013. It was beneficial, of course, to sportswear brands such as Adidas, Nike, and Puma, which paired with designers to give a twist to some of the brands' products (Figure 23). According to specialists the trend started appearing with more relevance in fast fashion after Alexander Wang's collection for H&M in 2014 (Figure 7) (Milligan, 2014). Many researchers use *micro trends* to identify broader and more substantial *macro trends*, which suggests that there are *macro trends* behind *micro*

trends, acting in the background. That means that *micro trends* are derivations of lower-impact background trends – more firmly based on social and cultural forces – that influence more directly products and services. In order to be a *micro trend*, a trend needs to come from an abstract and conceptual level, and acquire more concrete and aesthetic qualities. *Micro trends* are usually presented as product direction.

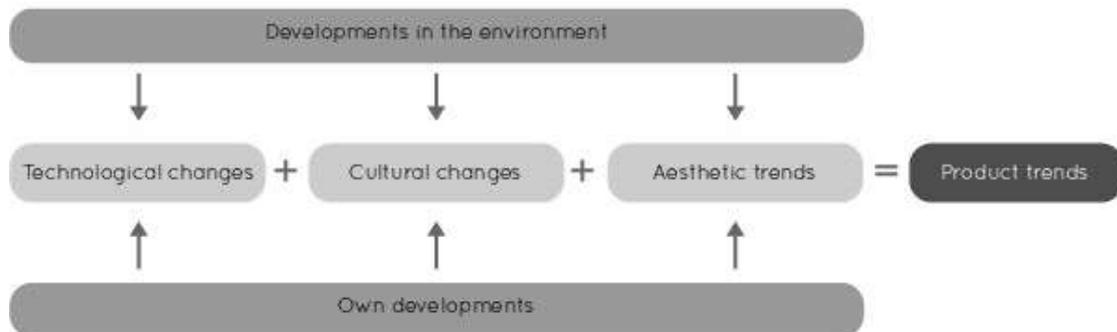
Figure 23 Adidas + Farm Rio [athleisure]



Source: Farm Rio (n.d.)

Buck, Hermann & Lubkowitz (op.cit.) write about trends applied to product design. In this context, trends are considered *micro trends*. To them a *product trend* is a trend addressed to product solution, grounded not only on technological, but also on cultural and aesthetic change (Figure 24).

Figure 24 Product trends



Source: translated and edited from Buck, Hermann & Lubkowitz (op.cit., p.59)

Although easy to apply, this type of trend can be dangerous. According to McCracken (op. cit.), they can be a blessing and a curse. At the same time that they may open fascinating opportunities, they are extremely treacherous because any changing vector may cause an overturn that completely changes the planned scenario. Besides, *micro trends* are difficult to trace. Since they have many origins, researchers would have to track all references to avoid “blind spots” that might invalidate the study (ibid.). The speed with which they appear, spread, and vanish further complicates the task.

As McCracken points out, due to the shifts, trickiness, and speed, many trend forecasters, himself included, would rather not research *micro trends*. However, many others consider these minor trends to be important, for they present noticeable hints about the future. These hints are also designated as clues or weak signals, and they are considered useful since researchers can extrapolate them in order to gain a glimpse of more distant events (Rehn & Lindkvist, op. cit.).

In summary, a *macro trend* consists of sociological and psychological aspects of long-lasting trends. They are usually well explained by shifts in cultural aspects and can influence different areas of human life. They last from five up to twenty years and, throughout this time, they can change and be adapted into different practices. In turn, *micro trends* usually have a lower endurance and impact, and can be considered as expressions of *macro trends*, or as the application of *macro trends* into specific areas as directions or guidelines, usually related to aesthetic aspects.

In the field of fashion, *micro trends* usually address a specific fashion season. The provided information in fashion trend reports typically consists of theme-related: [1] color-charts and color combinations – including harmonies that present proportional use of colors–; [2] prints and surface finishes, such as specific textures, gravures and touches; [3] fabrics and fibers that more or less express the theme; [4] shapes, silhouettes, and fitting, often presenting stylish or technical drawings; and [5] complements and details such as outfit-matching accessories and haberdashery.

Since in the commercial field of fashion product collections are often substituted, the general impression is that *micro trends* are quickly renewed. For that reason, *micro trends* in fashion are often considered *fads*. However, many fashion trends can last up to five years. Hill (2003) considers that when a *fad* eventually repeats itself in more or less organized circles, we can consider it a *fashion* – in accordance to what Solomon (op. cit.) proposes. The propositions Hill (op. cit.) addresses to *fads* can be applied to fashion *micro trends*. The author suggests *fads* can transform endemic situations into epidemic manifestations. The contagion of *fads*, or *micro trends*, would occur by symbolic exchanges, involving media vehicles and making the physical exchange unnecessary.

Gladwell (2009) also approaches trends and their contagion by referencing epidemics. He uses the term *tipping point* or *turning point*, adopted by Grodznis, to indicate the moment when an unordinary phenomenon causes a small change and suddenly – contagiously – turns into something massive. Therefore, the tipping point would be the exact moment when a certain change lurches, spreads, and ends (ibid.).

Likewise, Raymond (op. cit.) presents the concept of trend attached to the ideas of anomaly, eccentricity, incongruence, and norm digression that gains space and notoriety by means of *viral contamination*.

3.4 DIFFUSION

As an ethos, social phenomenon, or social total fact,²² fashion is organized and regularized by trend diffusion. This is one of the main subjects that causes interest in trends: their transmission or contamination processes, as considered by Gladwell and Raymond. Theorists of Philosophy, Sociology, Anthropology, Economy, and other scientific fields have dedicated themselves to investigating how fashions – trends – were disseminated between people from the different classes that composed society.

Historically, two models are central in the studies of fashion and fashion trend diffusion: [1] the trickle down model, literally top-down; and [2] the trickle up model, literally bottom-up. Traditional research into fashion diffusion considered the trickle down model applied to the comprehension of fashion through class imitation logic. From that point of view, the upper classes were a reference for novelty adoption, and therefore copied by lower classes. After an adaptation, the logic included the idea of distinction, giving it its dynamism. From the moment a member of the lower class adopted a trend, it was saturated, and it was up to the upper classes to create another novelty as a mark of distinction.

The second most recurrent model considers diffusion by *bubble up*, in a vertical direction from *bottom up*. It emerged with the rise of new styles in the margins of society, as counterculture movements. Those new styles, more than apparent alterations, were manifestations of collective subjectivities and social lifestyles, which a higher social group later adopted. Followed by Barbara Vinken, Ted Polhemus, especially, defends the emergence of a street style or street fashion as the reverse aspect of the trend diffusion logic. For them, innovations happen at the end and not at the beginning of the production chain, i.e, the *haute couture* now imitates and adapts impulses from the street (Lehnert, Kühl & Wiese, 2014).

In parallel, a third way arises with Pierre Bourdieu, also with Diana Crane and Kay McMahon, which considers that fashions does not move along a vertical line, but with individuals in their own social environment. This alternative proposition considers as central the role of mass production and media, making novelties (almost) simultaneously available to all social classes. The model is designated *horizontal flux* or *trickle across theory*, in allusion to the possibility of trend diffusion in all classes and groups at the same time. Other studies also consider trend diffusion in an interpersonal relation of people

²² Total social fact is understood, within sociology boundaries, as the group of values, cultural norms, and social structures that correspond to the cultural and social sphere, transcending the individual. "A social fact is any way of acting, whether fixed or not, capable of exerting over the individual an external constraint; or: which is general over the whole of a given society whilst having an existence of its own, independent of its individual manifestations" (Durkheim, 2004, p.59).

from what they call “introduction groups” and the institutionalized action of industry and specialized media.

3.4.1 Top-down models

Baldini (op. cit.) considers Bernard Mandeville (1670-1733) to be one of the first to have written about the diffusion logic of fashions. In *The Fable of the Bees*, first published in 1705, the philosopher wrote a poem that expresses social relationships in contemporary English society. The beehive was prosperous and rich, despite its numerous vices. As the bees ask Mercury for virtues, the hive bids farewell to wealth and prosperity. Mandeville’s classic work suggests vices such as the pride, envy, and vanity as important driving forces of the system (Mandeville, 1957). Fashion trends last, while textile trades and weavers disappear. Despite the mention of fashion and its fickleness, Mandeville does not directly address the matter of fashion (or trend) diffusion.

In the 1770s, Immanuel Kant (1724-1804) was in fact the first philosopher to write about the diffusion of novelties in society, considering them as the reason for the popularity of fashion. The work of Adam Smith (1723-1790) influenced Kant's studies regarding aspects such as the logic of imitation. Kant writes that imitation is a common behavior among human beings when regarding fashion – which he associated with futility. For both authors, “innovation” occurred in a context of social inequality in which the wealthier classes created novelties that would then spread throughout the less wealthy classes (Baldini, op. cit.; Svendsen, op. cit.). Christian Garve (1741-1798) was also one of the first, in 1792, to write about the human desire for change related to imitation, conviviality, demonstrative consumption, distinctiveness, and aesthetics (Meinhold, 2013).

About a century later, in 1883, Herbert Spencer (1820-1903) contributed significantly to the studies of Kant and Smith, reaching conclusions that converged with those of Gabriel Tarde (1843-1904), who was his contemporary. Spencer agreed, partially, with the imitation logic, but identified two different approaches to imitation: referential and emulative. That is, he considered that the logic of change involved the dialectic of imitation and differentiation. The philosopher was the first to consider both social status and distinctive individuality as supports to such dialectics (ibid.). In his conception, the goal of fashion was equality and, in the end, fashion would disappear, along with all signals of class distinction, in favor of individuality.

Gabriel Tarde considered, moreover, that distinction is the one and only mechanism that coordinates social change. “Socially, everything is just inventions and imitations” (Tarde *apud* Djellal & Gallouj, 2014, p. 3). In the year 1890, he published in the work *Les lois de l’imitation*, that imitation was the soul of social life and could be of different natures: conscious, unconscious, spontaneous, reflexive, voluntary, or involuntary. He detected an inclination to imitate the king, the court, and the wealthier classes, and that innovations (and fashions) were disseminated as imitation spread in descending order.

Already at the end of the 19th century, he noted that innovations could rise from less wealthy classes, but realized that in order for them to be disseminated as innovation, a prominent social figure first needed to adopt it. In this aspect, the aristocratic class was the most willing to adopt innovations from abroad, given their contact with foreigners due to travel and their greater openness to change, while the nobility remained more faithful to tradition. Tarde concluded that innovations would be a result from contradictions between old and new ideas, new fashions and customs, and its influence spread through all the areas of collective experience, surpassing the limits of clothing (Erner, op. cit.).

Years later in 1899, the American Thorstein Veblen (1857-1929) published *The Theory of the Leisure Class*, in which he inaugurates the ideas of *conspicuous consumption* and *snob effect* (Veblen. 2013). Veblen was the first to provide an economic explanation for the phenomenon of fashion, which he considered to represent change and the desire for novelty. The sociologist's explanation was based on the desire for social distinction. Accordingly, he proposed that the upper classes (leisure classes) used consumption to affirm and express their economic and social superiority; since consumption and financial recognition became predominant parts of modern social life.

In order to be considered remarkable, a female attire should have three main qualities: expensiveness, novelty, and unsuitability (ibid.). Since fashion and prestige were related to the principles of waste and conspicuousness, the dress needed not only to be expensive, but also uncomfortable – in order to express leisure – and fashionable – since the value of the dress is inversely proportional to its duration or use. The principle of novelty is also applied to social imitation and differentiation: as soon as the lower classes adopt the current fashion, it no longer has prestige and value and, therefore, needs to be reinvented. The effect also corresponds to what Veblen entitles *snob effect*, i.e. the expensiveness of a product, and the desire of many who would wish to own that product, increase its attraction.

Considered as the father of Fashion Theory along with Thorstein Veblen, Georg Simmel (1858–1918) published in *Philosophie der Mode* – in 1905 – that fashion is the imitation of a given model, and thus satisfies the need of support in society by creating a general module for society to follow, as well as satisfying the need for distinction and differentiation. The module is successful partially due to the change of its contents, which lends a certain individuality to today's fashion when compared to yesterday's or tomorrow's. Being one of the first to acknowledge fashion as a total social fact²³, he also foresaw the acceleration of fashion's movement – trend rhythms – to a level, which he considered frenetic and impatient (ibid., Simmel, 2015).

²³ The main theoretician of Sociology to insert the ideal of social fact was Emile Durkheim (1858-1917). For Durkheim, social facts are collective phenomena. These events are irreducible to private individuals, i.e., they refer to a group logic. Total social facts are constituted as "resulting from common life, a product of actions and reactions between the individual consciousness; and resonate in each of them, because of the special energy that is precisely due to its collective genesis" (Durkheim, 2004, p. 37).

Simmel saw fashion – as he saw other aspects of life – as composed by dualisms, contrapositions. Unity and equality paired with their contraries particularity and singularity (ibid.). The dualistic principal of difference and imitation resulted in a specific form of fashion diffusion. The principle involves the dialectic interaction between differentiation – the wish for distinction through individuality – and belonging – the wish for sociability through resemblance. For Simmel, fashion – which exceeded the apparel field and included ways of speaking, moving, and gesticulating – derived from the effort to equalize individuality and conformity, freedom and belonging.

According to Simmel, fashion is always related to class, for those in the upper classes would by dress and manner differentiate themselves from the lower classes, abandoning a fashion (trend) as soon as the latter starts to assimilate it²⁴ (ibid.). To be fashionable, one thus needed to be one step ahead of the lower classes, but not much more than that, since one needed to stress belonging to others in the same class. And so the imitation logic occurs, with fashions being emulated by lower classes, and in a corresponding movement, the upper classes altering their apparel and manners in order to mark a distinction. That establishes a self-perpetuating cycle of change, and a mechanism that assures a constant innovation process in fashion (McCracken, 2010, p.123).

The above-mentioned ideas relate to the most accepted model until the beginning of the 20th century, designated as *trickle down* theory or *Tröpfelmodell* – in German, dripping or spigot model – which is mostly ascribed to Simmel and Veblen, but was also developed by Herbert Spencer (1820-1903), influenced by the ideas of Darwinism, and social and cultural evolution (Skov & Melchior, op. cit.). *Trickle down* theory relates to social competition processes and rests on imitation and differentiation logics. Although highly controversial, this theory was the best-accepted justification for change and innovation in society for a long time. One of the causes for its historical strength is the historiography of attire, which usually only presented the attire of kings and queens, court, and nobility (Svendsen, op. cit.).

The contributions of Spencer, Tarde, Veblen and Simmel to the field of fashion is perceived when acknowledging the wide reception of the theorists' concepts, which have been critically analyzed and updated (Lehnert, Kühl & Weise, op. cit.). Many authors consider the *trickle down* theory to be limited, particularly because so-called subordinated and superior groups in a more modern process do not necessarily respond to social stratification. Nonetheless, it is also affirmed that fashion markets do not follow a logic of cascade, in which preferences percolate from the upper to the lower levels.²⁵

²⁴ “[...] daß Mode immer Klassenmoden sind, daß die Moden der höheren Schicht sich von der tieferen unterscheiden und in dem Augenblick verlassen werden, in dem diese letzere sich anzueignen beginnt“ (Simmel, 2015, p.105).

²⁵ McCracken reviews the *trickle down* theory in a short essay published in 1988. His first idea is that the metaphoric allusion of the term *trickle down* falsely designates the movement by expressing a force similar to gravity (McCracken, op. cit.). He disagrees with the idea of the elite as producers of fashion significance. For him, the movement occurs contrarily, since it is driven by the subordinated group. He

More recent models that were developed to review the *trickle down* theory will now be presented.

3.4.2 Bottom-up models

Decades after the reformulation of the *trickle down* effect as a diffuser principle in fashion, studies tracing another road grew significantly. As aforementioned, most of them considered that Simmel and Veblen placed too much importance on social competition as the engine for change and innovation in society and in fashion (Baldini, op. cit.). The work *The Psychology of Clothes* by the Englishman John Carl Flügel (1884-1955), published in 1930, represents the first efforts at a revision of the top-down model proposed in the *trickle down* and of the *conspicuous consumption* as driving force for fashion change.

Flügel initially elucidated that social competition was not the only cause for fashion innovations. In his conception, sexual competition would also stimulate change, as he considered that one dresses him/herself to hide and show, and mostly to draw attention to his/her own body (Flügel, 2014). The second point addressed by Flügel was the change of fashion aristocracy then, that accompanied ongoing political and social changes and established a new reference model with figures such as bohemian artists, athletes, and automobile drivers.

Flügel's third main consideration is that occasionally fashion would resume the opposite vertical movement to the one advocated by *trickle down*, suggesting a bottom-up movement, since the aristocracy was less subject to changes in dress and costume. To reinforce his hypothesis, he presented the male apparel, clarifying that in general the wealthier classes would show some resistance to extremely eccentric changes. The stereotyped notion of purity induced Flügel to the conclusion that dress modification was restricted to concise boundaries in the upper classes, especially for men. (ibid.)

Flügel's ideas influenced the majority of studies that intended to review the *trickle-down* theory, mostly during the 1970s. Field (*apud* McCracken, op. cit.) created in 1970 the term *upward diffusion*, often referred to as *trickle up*, declaring that the model of fashion and innovation diffusion inverted the *trickle down* model. One of the main reasons for the new model's proposal was the *embourgeoisement*, or gentrification, of the proletariat in post-industrial society; a society in which material and immaterial status symbols no longer had the same prestige as in previous times (ibid.).

Blumberg (1974) affirms that in the years before 1970, less wealthy classes and youth movement participants originated many trends. He explained that the trend diffusion model would course an ascendant path, creating the term *percolating up*. The term refers to leakage flow and liquid filtration through porous materials, and the addition of the particle *up* identifies the movement to be ascendant, rather than

describes the pattern as "chase and escape," because the subordinated "chase" status symbols of the elite, while those in the symbolically superior group quickly escape to find new status symbols (ibid.).

descendent as in *trickle down*. Likewise, Horowitz (1975) argued that mass fashion overcame elite fashion, and that *trickle down* was now unsuitable. Both authors state that relevant innovations started with minorities, with the majority adopting them independently of social levels or cores. Some examples of upward appropriation would be smoking by women, which started with prostitutes, and the use of ponchos and moccasin shoes appropriated from Native Americans (Figures 25 and 26).

Figure 25 Contemporary poncho



Source: Collectors' weekly (2014)

Figure 26 Apache Native American



Source: ibid.

More contemporary, the anthropologist Ted Polhemus (1994) conducted a research on streetstyle that reached high recognition mostly due to its reference to *style supermarket*. For him, new fashion trends arise from youth culture as street fashion and expand as concepts before reaching the runway shows of *prêt-à-porter*, from where they spread to the wardrobes of people in general, in a *bubble up* movement. Polhemus believes that subcultures give birth to fashion trends and have its codes quickly

commercialized into trendy industrial products. Various different influences, origins, and aesthetics compose a polyphonic look (Polhemus, op. cit.; Mesquita, 2007).

3.4.3 Contagion models²⁶

As an alternative model to the vertical models – *trickle down*, *upward diffusion*, *percolating up*, *trickle up*, *bubble up* – researchers propose virulence or contagion (Gladwell, ibid.; Raymond, op. cit., Dawkins, 2007). According to this model, the diffusion movement would surpass the upright orientation for trend propagation, by proposing a model of the horizontal orientation in which trends diffuse in a fanlike shape, breaking class hierarchy.

Charles King suggested in 1963 the idea of a *trickle across* movement, considering media exposure as enabling the simultaneous adoption of trends and new styles by all levels of society. Just as König did, he considered that what drives the movement is not the elite group – as proposed by Simmel – but fashion innovators (King&Ring, 1980; McCracken, op. cit.). King and Ring consider fashion innovators as influential and innovative communicators, who play a very specific role as fashion change agents:

Broadly speaking, the fashion change agent is a higher order fashion influential or fashion stimulator with a combination of unique skills and personal fashion attributes. The fashion change agent has a combination of fashion innovativeness, information transmission, knowledge, and social legitimization traits. As a visible performer in the fashion arena, the change agent performs simultaneously a variety of roles which stimulate the fashion adoption and diffusion process. (King & Ring, op. cit., p.15)

In 1969, Herbert Blumer (1900-1987) argues that fashion is created by collective selection through fashion movements – a concept coined by him. He analyses fashion as a system (ethos) in the context of mass society, seeing it as “a complex means for facilitating orderly change within a mass society no longer able to provide identity and maintain order via social custom” (Kawamura, op. cit., p.47). That is, in complex contemporary mass society, fashion is a way in which people invest in individuality and group identity by belonging to specific movements. The thesis – sideways diffusion – affirms that trend diffusion usually happens in the same social stratum, where groups change styles (Godart, op. cit.).

The ideas of the German René König (1906 –1992) in *Macht und Reiz der Mode* [Power and charm of fashion] in 1971 also were central to the review of *trickle down* theory. The sociologist believed that fashion trend diffusion occurred between medium social strata – from which the wealthiest groups inherited a referential character as leaders, diffusing novelties to all social classes, more or less prosperous. König’s thesis promotes middle class as influencers or innovators, although the terms did not yet exist. Fashion trends would spread contagiously; having such figures as main novelty diffusors.

²⁶ It is known that all the models of trend and novelty diffusion imply some degree of contact, therefore, of contagion. Therefore, the term was chosen because it is adopted by researchers such as Raymond and Gladwell in their theories of trend dissemination by groups and their progressive reaction timing.

The author was a pioneer in identifying that while social elites had performed the role of leadership in fashion trend diffusion; this was now the responsibility of fashion-conscious social groups (Meinhold, op. cit.).

The Italians Fabris (1974) and Alberoni (1964) also defended the pluricentric model, which considers the transmitting of novelties within a same social class as an intrinsic characteristic. They both perceived post-industrial society as dynamic, floating, egalitarian, and essentially democratic, in which the hegemonic middle class is the majority and rarely consumes conspicuously, but playfully²⁷, hedonistically (Baldini, op. cit.). Therefore, the middle class started to promote new and different consumer habits and to present a higher propensity to adopt innovations, becoming a reference for the establishment of purchasing patterns and production directions in contemporary society.

3.4.3.1 Typologies of trend adoption

Addressing the idea of leadership and influence when adopting trends, the studies of Bruce Ryan and Neal Gross²⁸ of the innovation adoption of a hybrid corn seed by farmers published in 1950 was central to the development of typologies of trend adoption in the field of fashion. Based on Ryan and Gross, on Tarde, and other similar investigations, Everett Rogers (1931-2004) concluded in 1962 that the pattern for the diffusion of innovation within a group, community, or social tribe is always the same, independently of the type of innovation.

The process begins with an *innovator* who transmits the innovation firstly to novelty-conscious groups, and later to those groups less open to new ideas. According to this logic, the *innovator* transmits the idea to a group entitled *early adopters*, who slightly adapt it and transmit it to another group: the *early majority*. This group successively transmits the innovation to another group, named by Rogers as *late majority*. This *late majority* in turn communicates the idea to the *laggards*, which is the group most reluctant to adopt a new idea or innovation (Rogers, 2010).

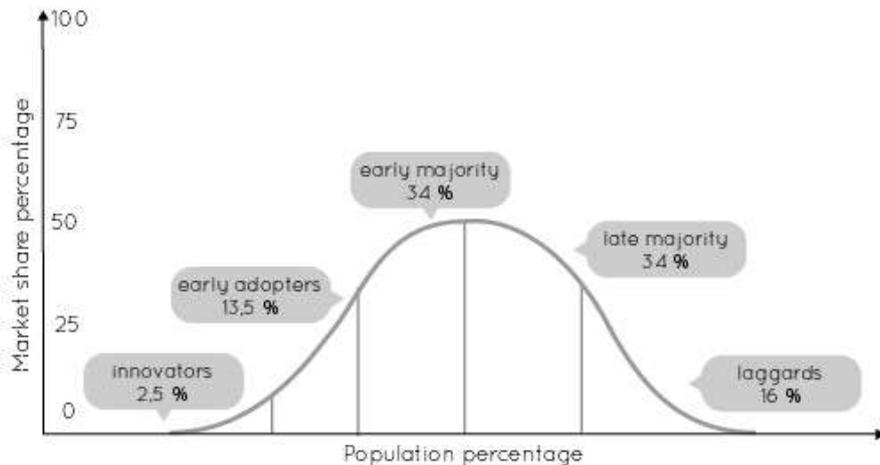
Even four decades after Rogers' discoveries, the typology and the percentile distribution established by him remain in use by trend forecasters to calculate the size of groups within society and, with that, to analyze the trajectory of a given trend. Raymond (op. cit.) agrees that the studied categories exist in all communities, cities, countries, and groups. He also believes that the size of each category remains proportionally the same.

²⁷ In "Paradoxical happiness: considerations on hyper-consumption society", Gilles Lipovetsky approaches the playful consumption and the relationship between the post-industrial man and consumption. Lipovetsky, G. (2007). *A felicidade paradoxal: ensaios sobre a sociedade de hiperconsumo*. São Paulo: Companhia das Letras.

²⁸ See paper: Ryan, B. & Ross, N. (1943). Diffusion of Hybrid Corn Seed in Two Iowa Communities. *Rural Sociology* (8), 15. Retrieved 1st August 2017, from http://chla.library.cornell.edu/cgi/t/text/pageviewer-idx?c=chla;rgn=full%20text;idno=5075626_4294_001;view=image;seq=17 or full study *Acceptance and Diffusion of Hybrid Corn Seed in Two Iowa Communities*. January, 1950 *Research Bulletin* 372, pp.1-48. Retrieved 1st August 2017, from http://lib.dr.iastate.edu/cgi/viewcontent.cgi?filename=9&article=1029&context=ag_researchbulletins&pe=additional

[1] *Innovators* are outnumbered by the other categories with only 2.5 percent of a population; [2] *early adopters* usually represent 13.5 percent; [3] the *early majority* corresponds to 34 percent of a group; [4] *late majority* represents 34 percent, and [5] *laggards* 16 percent (Figure 27).

Figure 27 The adoption of innovation's curve



Source: Rogers (op. cit.)

The proposed categories were visually expressive in distinct ways, assuming the shapes of: the already presented Gauss curve (Figure 27), the S-curve, and the diamond. The S-curve representation (Figure 28) expresses the extent of adoption and acceptance of a trend or innovation over time. The graph represents the growth of acceptance from the *innovators* at the beginning, through the *early adopters* and both *majorities*, to the top of the curve, where one finds the *laggards*. This final point, inflexion point, denotes the end of a trend, i.e., the moment when it dies. This is when another trend substitutes the perished trend by coursing the same path.

The Danish trend researcher Henrik Vejlgard developed the diamond model (Figure 29). This new proposition also presents issues on the speed with which different products run through the diamond stages²⁹. Variously, he outlined eight different participant profiles in the process of trend diffusion. The first ones are the [1] *trend creators*, who compose a limited but highly creative and inventive group. Secondly, the [2] *trendsetters* are opinion leaders, enthusiasts, and innovators that experiment with trends and novelties before their major acceptance, communicating them to other groups. After them, the [3] *trend followers* are those who need trendsetters' approval before adopting a trend. In turn, [4] *early mainstreamers*, a group similar to Rogers's *early majority*, is the primary dominant group to accept trends slightly earlier than the *great majority*.

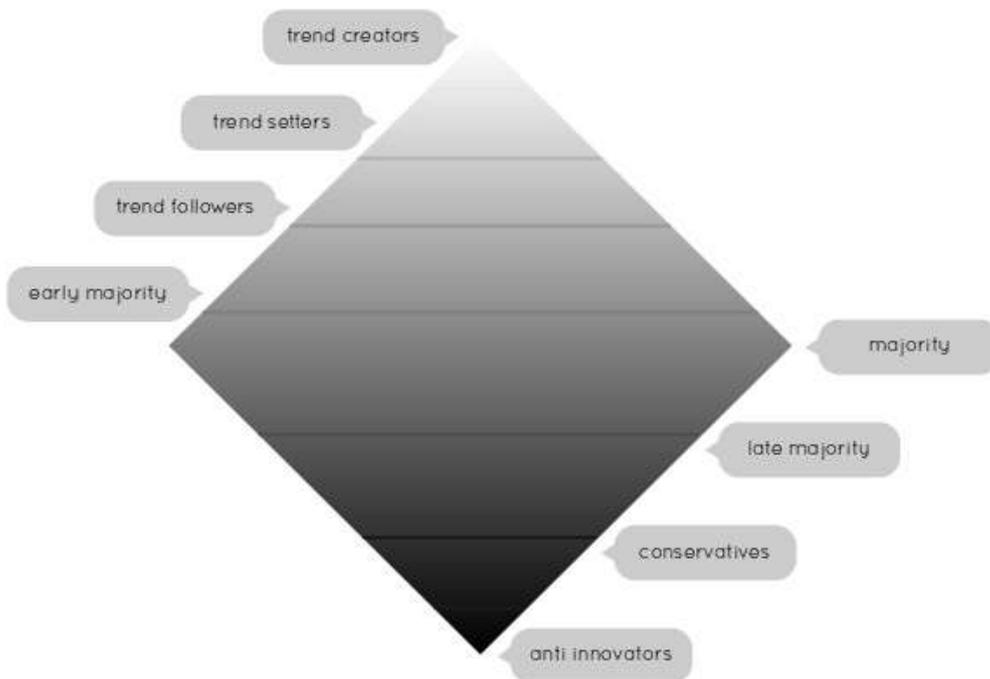
²⁹ Vejlgard considers that with approximate calculations one may identify how long will a trend period last. The values stipulated by the researcher are from three to five years for trends in clothing and accessories. From five to seven years for furniture and interior design and from one to two years for cosmetics, beauty and personal care products.

Figure 28 S-curve typology of trend diffusion



Source: Raymond (op. cit.)

Figure 29 Diamond shaped typology of trend diffusion



Source: Vejlgard (op. cit.)

Also on the list, the [5] *mainstreamers* are those who adopt trends already “tested” and approved by the media, and more innovation-conscious groups. The [6] *late mainstreamers*, the late dominant group, is hesitant to change and accepts the consumption of products that are considered obsolete. The [7] *conservatives* are mostly skeptical regarding changes, they follow patterns that last decades and change only when

they can no longer find the products they used to buy and consume. Lastly, [8] the *anti-innovators* are those who do not accept changes and live in closed groups, such as closed hippie communities or the traditional religious Amish community in the United States (Vejlgaard, op. cit.; Santos, 2013).

Although the contagious logic takes into account the introduction of different groups, an imitation and differentiation logic remains – although now independently of social class. Trend processes – as well as all processes in mass culture – outline obsolescence mechanisms analogous to the physical phenomenon of entropy (ibid. p.47). That is, all innovation tends to lose its meaning and particular qualities, insofar as greater social groups assimilate it and it reaches broad diffusion. Therefore, groups start gradually rejecting trends in favor of their replacements.

Commonly, analyses of how contact between groups happens enrich studies of introduction groups – or innovation diffusion groups. A wide-ranging bibliography seems to agree with the concepts of viral contamination, *memetic*, and the network of strong or weak ties. In his 1976 book *The Selfish Gene*, Richard Dawkins writes that a meme is the cultural version of a gene, considering that it reproduces itself as an answer to social, ethical, biological, or environmental changes that may cause its obsolescence (Dawkins, op. cit.).

For the author, if the gene is the unity of genetic heritage, the meme is the unity of cultural heritage. Just as a gene transmits genetic information and can migrate from one body to the other by reproduction, a meme transmits its information by *memetic* endowment or imitation (Raymond, op. cit.). Relating trends to *memetic*, Raymond considers that trends and memes infect us as viruses. When regarding consumer trends, one may consider that purchasing a product involves, among others, its attractiveness, which in some level relates to social, cultural, and psychological values related to that object. The possession of certain objects makes us feel daring or conservative, similar or unique, and many times more accomplished, since the product is associated with the people who own it and thereby carry its values and significations, such as the advertisement images that build symbolic myths, *memes*, about such products.

3.4.4 Media influence models

Despite mutual influence and contact between people who live together or coexist, other theoretical lines consider that there are hidden (or not so hidden) forces that have a greater influence than the bonds of social interaction. From the 1950s, studies went back to the *trickle down* theory and proposed its improvement, since it did not take into account the complexity of trends' diffusion within post-industrial societies. Most theories now account for communication and the influence of the media. Bearing in mind the role of media, Erner (op. cit.) and Baldini (op. cit.) were the authors who suggested the study of communication theory related to the diffusion of fashion trends and innovation. Therefore, the following explanation was guided by their suggestions.

Although Nicola Squicciarino was the first theoretical to name the *puppet theory* – the "improved" *trickle down* theory –, in 1986, other authors had defended the theory before him (ibid.). Baldini names Ragone, in Italy, and Baudrillard, in France, as the first to evidence the subsistence of a masked pyramidal relationship of consumer-dependency in trend diffusion. Even before them, in 1930, Bineham organized the behaviorist theory of *hypodermic needle*. It proposes the direct influence of media on individuals, who accept information without contest. Harold Lasswell (1902-1978) supported the model, when in 1948 he developed the entitled *magic bullet* theory, which was initially used to describe communication mediated by mass media (Sousa, 2006).

The *magic bullet* theory acknowledges that communication directly influences society, and that media can dissolutely provoke significant changes in the public's opinions and behavior. This perspective, as well as the *puppet* and *hypodermic needle* theories, is much criticized and now considered obsolete because it excludes the receptor as agent and as capable of criticism and appreciation, besides accusing the media of malicious intent. The names of the theories themselves imply the metaphoric translation of the mechanical behavior of the emission of answers directly after the reception of a media stimulus: the message (ibid.).

The *hypodermic needle* theory considered diffusion as a reactive process and society as a cluster of uniform and passive subjects, a "helpless audience". A study about the broadcast of *The War of the Worlds*, conducted by Hadley Cantril and based on the ideas of Paul Lazarsfeld and Herta Herzog, exposed the weakness of the behaviorist model by showing that there were various reactions to the broadcasted message, and that these varied based on the attitude of listeners (ibid.). Cantril and others concluded that despite the undeniable power of the media, the personality and psychological characteristics of individuals are significant factors that influence how each person reacts to messages broadcast by the media.

Contesting the *hypodermic needle* model, Katz and Lazarsfeld proposed in 1955 the theory of the *two-step flow of communication*. According to both in the work *Personal Influence: the part played by people in the flow of mass communications*, opinion leaders filter and interpret the messages sent by mass media to the public and they themselves influence their primary groups (ibid.). The theory establishes a new perspective on the success of mass media; studying them not in isolation, but as reciprocal interactions among recipients, forming a more complex scenario that considers the power of personal influence. The theory evidences the vulnerabilities of media, and the existence of social relationship networks and individual mechanisms acting against persuasion.

Katz and Lazarsfeld's study implies a need to consider mediating agents in information (although one may read innovation or trend) diffusion for the efficiency of media: opinion leaders, who exercise interpersonal actions and influence people by working as an intermediary level between media companies and individuals. These opinion leaders, more receptive to innovation, promote the flow of the information they

receive in their immediate social context and can influence people around them (ibid.) – as showed by Rogers’s (op. cit.) research on innovation adoption.

Lazarsfeld was, moreover, insightful to point out that opinion leaders do not necessarily belong to wealthy social classes. They merely show a great interest in media output, and have a greater capacity to influence people around them. With this consideration, the author sets up a new morphology for the dissemination of information, in an attempt to reveal the complex web of social relationships involved in the effects of social communication. His work corroborates the concepts of fashion innovators and fashion change agents, from the works of King and Ring (op. cit.), and Crane (1999), as playing a crucial role in novelty diffusion.

The American sociologist, Diana Crane, considers that for a trend to circulate among a greater audience and achieve commercial and cultural success, it needs to be discovered and promoted by particular players. Since innovators tend to run smaller businesses or be part of specific and restricted communities, trends need to be acknowledged and invested in by bigger companies, which produce trendy products and make them more “market aggressive”, reaching the public (ibid., p.16). This is because street fashion is subject to the approval of gatekeepers (Kawamura, op. cit.).

Specifically in the field of fashion media and journalism, gatekeepers are professionals that legitimize garments, designers, celebrities, practices, and behaviors as being trendy and fashionable (ibid.). Literally the guards of the gates of publication, they are the arbitrators who decide which news to publish and which news not to publish, according to the editorial line and their pre-established criteria. They are responsible for the aesthetic choices of a magazine and contribute to the diffusion of trends. “Their primary role within the present-day fashion system may be that of speeding up fashion change because they show new fashions that are being worn by persons or groups who have the prestige to be legitimators”. (ibid., p.64).

However, the emergence of collaborative journalism altered the attributions of gatekeepers. Also due to an active and participatory audience, the figure is not as centralized as before, although it remains relevant to information structure. Strong adherence to digital and social media rather than to traditional media processes effectively controls the power of mass media in transforming a possibility into certainty. In addition, the great variety of journalists and media vehicles, and the wide range of subjects that attend to the interests of specific niches, diminish the influence of traditional publications. One of the main factors for the relevance of media is what Gladwell (op. cit.) calls the *power of adherence* and *power of context*.

For a message to become a social epidemic, it needs to be memorable enough to create change. This is the *adherence factor*. Communication is therefore essential to trend diffusion, since information involves the organization of data and, at the same time, communication involves the choice of a transmitter and a medium for the message, in order to create relevance (ibid.; Caldas, op. cit.). The *power of context* comprises a convergence of factors to form a favorable context to the diffusion of the trend. By

engaging both of Gladwell's "powers", media can be seen as fundamental to (fashion) trend establishment.

The organization of fashion as a system – whose central foundation is change for the pleasure of change – originated with the emergence of magazines, which allowed and stimulated the spread of trends through visual and textual contact (Baldini, op. cit.). A system characterized by change could not flourish in cultures and societies without writing, since such societies are more traditional, conservative, and consequently unfavorable to novelty (ibid.). On the other hand, in cultures with writing and press, novelties and trends tend to advance by information diffusion (Lipovetsky, op. cit.).

Regarding fashion information, especially after the 19th century, the press performed a central role in the criticism of fashion and trends, already presenting a more or less institutionalized legitimacy in the judgment of taste. In the fashion capitals at the time – Paris, London, and New York – the number of magazines and newspapers dedicated to presenting and criticizing trends in industrial design, fashion, and art grew exponentially (Monçores, op. cit.). Meanwhile, fashion fairs reinforced trends by presenting information similar to that reported in the media to different clients in the form of consumer goods (Skov, op. cit.). Fashion journalism arose as an effect of a consumer society that saw in the media not only information on current affairs, but also allusions to what products they could and should purchase (Kronka, 2006).

Fashion literature presents various cases of both successes and failures of trend "imposition" by the media, through the figure of fashion editors (Erner, 2005, 2012; Godart, op. cit., Caldas, op. cit.; Monçores, 2013b; Kronka, op. cit.). As affirmed previously, not all suggestions made by journalists and editors achieve commercial success. However, a premise of this study is that fashion as a system (Kawamura, op. cit.) operates coordinately with social, commercial, and industrial organization, in lifestyle as well as in media and entertainment. Therefore, despite relativizing the role of media as *the fourth power*, which mediates the relationship between individuals and different powers, media remains key to understanding fashion trend diffusion.

Fashion magazines serve the interests of the fashion industry by broadcasting the latest fashion trends and styles, and by accelerating fashion promotion. The fashion media, in the role of gatekeepers, observe, select, and communicate their choice of innovations considered in or out of fashion (ibid.). Nonetheless, the earliest adoption of the term *trend* in fashion occurred in a periodic publication, and the term only achieved its technical notoriety when the former fashion journalist Françoise Vincent-Ricard was invited to found a committee in order to organize the industrial system of French fashion.

The committee provided fashion trend information for the different stages of fashion production, according to a calendar specifically created to coordinate with the fashion industry's supply chain. According to Crane (2006) and Kawamura (op. cit.), this organization of the French fashion trade influenced the hierarchical structure of fashion as a system which still exists today. The committees led by fashion magazine editors officially inaugurated the category of fashion trend and institutionalized fashion

expertise, creating space for style consulting and fashion trend forecasting, the *bureaux de style*. After the emergence of the first *bureau de style*, many other offices followed similar paths, also led by journalists. Ever since the number of agencies and offices that try to identify trends by analyzing their dynamics has continued to expand.

3.5 DYNAMICS

Frédéric Godart points to the historic continuity and regular recurrence of certain trends. Meinhold (op. cit.) considers, however, that recurrent fashion trends somehow need to be seen as new in order to be considered trendy again. That is, they need to substitute an old trend in order to be considered novel and trendy. The literature of the field considers that independently of the diffusion logic, fashion trends occur in cycles. The main philosopher to study fashion trends' cyclicity was Alfred Kroeber (1976-1960). At the end of the 1910s, he conducted an investigation based on historical data about the variation of the length of skirts. He concluded – as Roberson did in 1976 – that trends do not occur randomly, but they respond to what happened in the precedent time, functioning in waves.

If traditional, fashion seemed to have a linear logic, by which a new trend substitutes an opposite old trend; contemporary trend renovation occurs faster and follows a more complex logic. Svendsen (op. cit.) does not consider cyclicity to be a phenomenon of contemporary fashion, because novelties can be seen to have adopted old styles since the 15th century. Today, however, fashion seems to focus on its own recycling (ibid., p.33). Demand for innovation has shortened fashion trend cycles, which has led to the instantaneous insertion of successive novelties. As a consequence, the recycling of anterior styles in a certain eclecticism has become a norm of fashion in the present day (ibid.).

This logic between older and newer trends can be expressed in terms of trends and countertrends. The trend-countertrend logic works in two distinct ways: [1] diachrony and [2] synchrony. The [1] diachronic logic considers the already mentioned traditional change between opposites. It is an easily perceptible dynamic. One notices a recognizable shift between opposites when comparing the bold style, colors and silhouettes in 1980s (Figure 30) with the minimalism, sobriety, and therefore neutral colors that typified 1990s apparel (Figure 31).

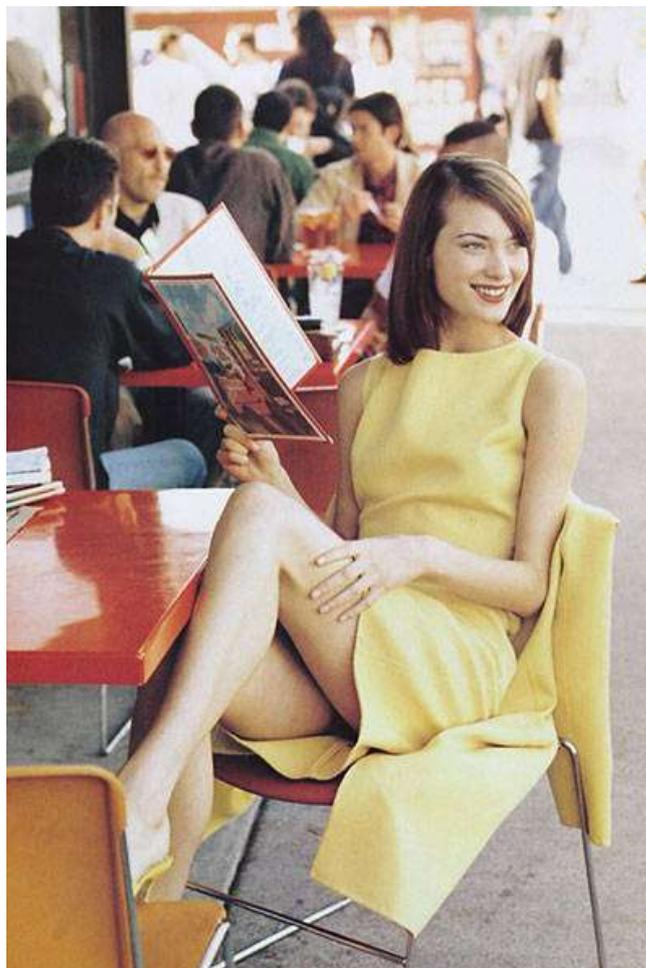
As with cyclicity, an awareness of the [1] diachronic dynamic does not solve problems in trend forecasting. Knowing the change between positive and negative, between in and out, is not enough to prognosticate the future. The remaining question is: through what shapes and meanings will the opposition be expressed? In *Race and History*, Lévi-Strauss (2000) employs the metaphor of chess. In the game, one knows the movement to be executed by each piece; for example, the knight on a white field moves to a black field in an L-shape movement. However, the movement involves a choice of one of eight possible options. Similarly, there is always indetermination in fashion trend alternation (ibid.; Caldas, op. cit.).

Figure 30 1980's clothing: boldness



Source: Harper's Bazaar (2015)

Figure 31 1990s clothing: minimalism



Source: Harper's Bazaar (2014)

The [2] synchrony principle consists of the coexistence of opposite trends as a characteristic of contemporary times. Democratization of culture and influx of information has led to a scenario of simultaneity, in which (fashion) trends and countertrends are harmoniously and dynamically balance. The flux system implies the temporal continuity of “old” trends, which in closed diachronic cycles would be completely substituted by “new” trends. The goal of fashion was once to make all other trends obsolete. The current synchronic logic points to a rupture with the traditional notion of change, offering fashion trend supplementation (Svendsen, op. cit.).

Figure 32 Fitness trend



Source: Harper's Bazaar (2013)

Trend researcher Faith Popcorn considers that the same person constantly invests in both trends and countertrends, for people themselves are contradictory. People who eat healthily and regularly practices exercise and sport, following the current fitness trend – entitled *Survival* trend by Popcorn (Figure 32) – are the same who on weekends or special occasions allow themselves to eat fatty dishes or sweet desserts because they consider themselves worthy of that pleasure, since they lead a regulated life – addressing Popcorn's *Little Indulgences* trend (Figure 33). One needs to understand how trend and countertrend simultaneously operate and, even, reinforce another. Polhemus (op. cit.) makes similar considerations.

From a more contemporary perspective, Meinhold considers that neither linear, cyclical nor spiral visual structures seem to capture the course of trends. That because a trend often presents recurring elements (therefore not linear), rarely follows systematic laws (therefore not spiral), and never presents exactly the same features as older, revisited styles (therefore not cyclic). Trends are best considered to be of a chaotic nature (ibid.). In the same direction, Svendsen identifies the contemporary phenomenon of trend to follow a supplementation or accumulation logic. Such an idea expresses how all

trends are more or less contemporary to one another, and they are all eternally recyclable, in a time of extreme pluralism, in which the new no longer substitutes the old. Instead, new and old – or as Svendsen (op. cit.) proposes, the old and the old – operate transversally.

Figure 33 Mr. Gugu and Miss Go Sweater



Source: Parq (n.d.)

Amid this confluence, *bureaux de style* have created an organizational manner of delivering fashion trends as design guidelines for the brands and for the entire fashion market. In addition to the convergences operated by the *bureaux de style* as a strategy to channel variables which are difficult to control, there is also an underlying social, cultural, political, and economic force, unresolved by institutional efforts. The logic of change conduction is one of the most controversial topics of trend studies. In the following pages, I present in a more incisive manner the topics of endogenous and exogenous forces as rationales for fashion trends.

3.6 BEHIND THE TRENDS

Some authors comprehend fashion as a source of change itself, coinciding with the principle of the fashion ethos: the search for the unstable and ephemeral novelty, where one changes for the sake of changing. Others consider that fashion cycles correspond to relations set between historic continuity and the recurrence of certain trends. Some affirm that the changes only happen due to the institutionalization and organization of the market; especially when considering changes in the fashion industry. The majority of authors, among them Godart (op. cit.) and Caldas (op. cit.), consider the influences of cultural, political, economic, and social forces on fashion. Therefore, fashion trend diffusion is not likely to happen in a vacuum, in social emptiness.

3.6.1 Exogenous forces

For Godart, a differentiation between trends that depend on the institutionalized organization, and trends that depend on underlying social and cultural mechanisms is required. In an attempt to understand the logic of trends without direct commercial implications, most scholars refer to Stanley Lieberman's (2000) study on trends in names given to newborns. The conducted investigation revealed that, despite the important role of institutions in the launch of trends, there are deeper forces, uncompromised by commerce and industry, which influence taste, choices, and, clearly, trends.

If changes are organized endogenously within productive and commercial fashion institutions, they are more or less based on an exogenous reference, i.e. even with financial interests, trends happen in a favorable cultural, social, economic, and political context. This can be noted in all trend forecasting manuals, which are composed with the help of various tools and techniques from social and cultural research (Caldas, op. cit.; Raymond, op. cit.; McCracken, op. cit.; Rehn & Lindkvist, op. cit.; Veijlgaard, op. cit.; Buck, Hermann & Lubkowitz, op. cit.; Gomes, 2015; Kjaer, 2014; etc.). Trend studies usually rely on the *Zeitgeist* to forecast which trends will most likely prosper in the far or near future.

The German term combines two words: *Zeit*, time, and *Geist*, spirit, ghost. Its popularity probably derives from Johann Goethe's (1749-1832) use in *Faust* (1808), and Georg Hegel (1770-1831), who applied the term more expressively. *Zeitgeist* consists of an absolute spirit that emanates from things, as a soul in its own right. The original conception, primarily used in the eighteenth century, considers *Zeitgeist* as "various opinion at a given time, taste or desire" (Hegel, 2011, p.70). Hegel defends that the spirit that influences a certain time period is like the soul of that period. To him, all truths are tied to the historical context of a specific epoch, time, or moment (Souza, *et al*, 2010). Parting from such a perspective, both Philosophy and History are dynamic, as are the groups of values and meanings symbolically attributed by society in the course of time.

For anthropologists such as Clifford Geertz (2001), upon whose work many trend researchers rely, there is something in common that seems to coordinate many different expressions of a same concept without a evident explanation, be it the *Zeitgeist*, be it another sort of mental contagion. In the field of Psychology, in 1960, Bush and London conducted expressive studies on the influence of cultural dynamics on clothing in the fashion industry, mostly considering the transformation of the role of teenagers in North-American society (Godart, op. cit.). In fashion, the idea of the *Zeitgeist* as a justification for the causes of change was originally defended by Flügel (op. cit.) in 1930, and reinforced by James Laver (2008) in 1945. For them, the spirit of the time incites changes not only in dressing and apparel, but also in architecture and interior design.

Authors considered materialists, such as Marx and Gombrich, refute Hegel's thesis of an innate spirit that impacts upon culture and society. The problem with the *Zeitgeist* theory is the vagueness of the term and its limited empiric content. It is very hard – perhaps impossible – precisely to identify the *Zeitgeist* of a time. According to Svendsen (op. cit.), *Zeitgeist* as rationale for changes in fashion only made sense when

renovations lasted longer. It is indeed unlikely that the set of symbolic meanings could completely renovate itself within six months, which corresponds with the period of time that a fashion collection is offered for sale. If there is a *Zeitgeist* that influences the current era, it is the *Zeitgeist* of trend pluralism (ibid.).

Despite contradictions, the majority of trend forecasters still defends the concept and relies on the theory. In spite of being hard to define, there are undeniably coherent similarities in different fields of expression – in fashion, design, architecture, behavior, etc. – that seem to converge, in allusion to an influential *Zeitgeist*. Therefore, Svendsen's ideas need to be relativized. Deeper changes, referred to mainly as *macro trends*, do influence changes in dress and clothing, which do not necessarily follow the calendars proposed by the fashion industry. Contemporarily, long-lasting styles within the fashion industry last around five years before they become obsolete; even though new garments can be launched monthly due to demand stimulation (Vejlgaard, op. cit.; Riello, op. cit.).³⁰

3.6.2 Endogenous forces

In order to control the acceptance of novelties, the fashion industry updated the idea of a trend as controlling mechanisms that minimize market uncertainties as early as the 1960s – as previously affirmed. For Caldas (op. cit.), the practice is simple: the different actors of the textile chain coordinate among themselves the information about future collections, reducing investment risks. International color committees, *bureaux de style* and trade fairs³¹, like *Première Vision*, would create the orienting – or determining – fluxes in fashion. Such coordination made the industrial fashion system a reference for the management and control of a product launches.

Except for Erner (op. cit.), no author professedly considers trends as *self-fulfilling prophecies*, but many of them do consider that the fashion industry has updated the idea of trend coordination as a strategy against market uncertainties. Baldini (op. cit.) presents that some theorists have analyzed the fashion industry from the perspective of conspiracy but, as with the *puppet theory*, such an approach disregards the will and activeness of the consumer. Thus, as aforesaid, despite the existence and the efforts of the industry in creating reiteration and repetition, not all efforts of trend direction are effective (Erner, 2005, 2012; Godart, op. cit., Caldas, op. cit.; Svendsen, op. cit.).

In a work completely dedicated to trend studies, *Sociologie de les Tendances* [Sociology of Trends], Guillaume Erner (2012) considers when it comes to fashion trends, the messenger outweighs the message. The author asserts that other researchers have failed when trying to comprehend the dynamics of trends in fashion by not considering that the conditions for the launch of a new trend are more important than the content of the new trend. For the French sociologist, we have dedicated too much attention to the messages, and not enough to those who issue them and their role within fashion's

³⁰ For example, the company Zara launches around 17 mini collections in a single year (Godart, op. cit.).

³¹ A clarifying study on the role of fairs in the fashion system was conducted by Lise Skov (2006).

coordinated system. Trend information requires, therefore, legitimated and contextualized issuance.

In that sense, Erner adapts Merton's theory of a *self-fulfilling prophecy* for trend theory, specifically regarding collective arbitrariness; considering that any object or practice can become a trend, once it is believed that it is in fact a trend. That is, the belief mechanism transformed into reality is the so-called *self-fulfilling prophecy*. The theory also postulates that the beliefs of a certain situation are part of that situation and therefore affect posterior events. People respond not only to objective attributes, but also and mostly to the meaning the situation has for them (Erner, op. cit.; Merton, 1970).

Reviewing Erner's ideas, Baldini (op. cit.) proposes that although fashion experts are not likely to arrange secret meetings around Lake Como to select seasonal trends, it is not untrue that fashion as a system is organized in the best way possible, aiming to reduce risks. The truth is that trends result from endogenous and exogenous factors. German trend forecasters Buck, Hermann & Lubkowitz (op.cit, p.46) consider a trend to be a meaningful social, commercial, or technological innovation that a company has researched, discovered, and made use of. Mostly the differences between both trend forms (endogenous and exogenous) hard to define, for they often overlap each other.

Specifically regarding the fashion system, Kawamura considers the view that fashion trends result from a conspiracy to be simplistic. The enforcement of market and trade stimulation may be an economic explanation, but it is not a sociological one. "The system provides the means whereby fashion change continually takes place" (Kawamura, op. cit., p.5). The different institutions of the fashion industry invest and accelerate the pace of change, but are themselves not the only explanation for constant apparel renewals, which express variations of symbolic meaning within society.

The democratic dynamic of fashion is highly paradoxical, since with the freedom of choice, individuals end up following a new suggestive power: opinion. In the relationship between the individual and collectivity, following opinion leaders, specialists, and experts represents a relief from the pressure of choice. At one end, fashion producers rely on *bureaux de style* trying to discover what consumers will likely purchase in upcoming seasons. At the other end, consumers visit fashion blogs and magazines trying to decipher which trends will prevail.

As an informant to the whole supply chain as well as the specialized media, *bureaux de style* promise to both ends the fulfillment of their request: that the trends they identify will prevail. Conducting predicative research based on social, cultural, and political dynamics, they comprise the traditional central source of information to the profit-driven system's internal dynamic. The following pages approach the centralization of expertise and the institutional organization of *bureaux de style* and their role in the context of the fashion system throughout time. The next chapter, moreover, elaborates on current successful *bureaux de style*, their brand strategies based on tradition, professionalism, and legitimation, and the manner in which they present their products – fashion trend reports – and themselves as experts.

4. FASHION TREND EXPERTISE

Different theorists discuss the conceptual implications of both Modernity and Postmodernity. On the one hand, advocates of Postmodernity consider that the central ideas of Modernity, such as Positivism, Rationalization and Individualism (Maffesoli, 2004), have been or are being overcome, and open the way to Postmodernity. On the other hand, other authors support the theoretical and conceptual maintenance of the term Modernity, or even a shift to a hyperbolic version, Hypermodernity. The prefix *hyper* expresses the inflation of its core values: Individualism, Consumption and renovation that justifies itself (Lipovetsky, 2007). This discussion leads another possible outlook: Reflexive Modernity.

The theses of Giddens, Beck and Lash are directed towards the understanding that "the more societies are modernized, the more the agents (subjects) acquire the ability to reflect on the social conditions of their existence and to change them in that way" (Beck, 2012, p.259). Giddens specifically states that Reflexive Modernity results from what he considers the consequences of Modernity. The idea of a completion of Modernity is highly arbitrary, and disguises itself against the supposed emergence of a post-traditional society³². "To consider that we are in the High Modernity means that the contemporary society does not stand in a phase beyond Modernity, in an ultimate conclusion of its establishing principles, but a radicalization of such principles" (Chavez, 2004, p.35).

The period of reflexive modernization elicits two spheres of transformation that originated from the early development of Modernity and became particularly intense in contemporaneity. [1] A sphere encompasses the processes of intentional change connected to the radicalization of Modernity; such as abandonment, disembodiment and the problematization of tradition. [2] The other sphere, which will be emphasized as a foundation for this dissertation, covers the extensive spread of modern institutions that have become universalized, considering the processes of globalization (Giddens, 2012).

Giddens mainly considers Modernity from the operation of disembedding and re-embedding mechanisms, which will be detailed in the following pages. Modernity has diverted us from direct action and full experience in exchange for mediated experiences. The agency of such mechanisms can be easily identified in industrial production. During the Middle Ages, a person who wanted to purchase furniture would need either to manufacture it himself, or to resort to a trusted person with skills in furniture handcraft. That is, the relationship between product, producer and consumer was direct. With the industrialization processes, one is unaware of the manufacturer and unfamiliar with the raw materials' producers. One disregards the project's developer and deliverers. If it were

³² The concept of tradition will be recalled in this study. At this moment, it is only valid to report the agreement that Giddens proposes: that modern society has seen traditions crumble, and that more traditions could be built. Especially because, in Western society – and here with emphasis on the market of fashion trends, which is the subject of this dissertation –, there have been many efforts to create and recreate traditions in favor of the legitimacy of power.

not for the reliance on expert abstract systems (companies, brands and specialized knowledge), Modernity would not be plausible. The vacuum of direct experience caused a great degree of insecurity and uncertainty, which was remedied – to some extent – by the development of a certain trust in expert systems. The vacuum caused shifts and re-appropriations of specialties. As such, "the technology, in the general sense of technique, plays here the leading role, either in the form of material technology or of social expertise" (Giddens, op. cit., p.95).

Specifically in the fashion production-distribution-communication system, the idea of an abstract system can be seen in the various specialties of the field: from dyes to draping, from fashionistas to *bureaux de style*. Each stage of the design, production, distribution and communication cycles is composed of different groups of experts, in which other groups trust the proper functioning of the chain. Expertise beyond fashion specialization, but which also involves the creation and production of fashion may also be considered, as mentioned in Chapter 2.

Beyond the appreciation of expert knowledge, there is an even greater appreciation of expert systems conducting immaterial labor. Thus, in the fashion branch the works considered most important are: [a] design – in the personal form of designers and style directors, and in the institutional figure of brands–; and [b] fashion trend forecast – in the personal form of trend gurus, like Li Edelkoort, and in the institutional form of the *bureaux de style* . Both occupations are deemed immaterial works.

This chapter particularly endeavors to investigate the origin and the meanings of the major *bureaux de style*, fashion trend forecasting companies, and the wide network of relationships that they arrange in the fashion system, by demonstrating their centrality in creating value for fashion products. Expertise in fashion trends; which involves trend forecast, design, manufacture and consumption; develops and maintains the traditional process of the centralization of expertise in fashion. Thus, the “great” *bureaux de style* sustain their legitimacy due to their discourses and the circulation of specific representations, which in this case can be seen as branding strategy. *Bureaux de style* maintain and reiterate their expert status as they continue to articulate demand, production and consumption in the branch.

4.1 EXPERT SYSTEMS

According to Giddens (1991; 2012), there are three main sources that coordinate the dynamism of modernity. They are: [1] the separation of time and space; [2] the development of disembedding mechanisms; and [3] the reflexive appropriation of knowledge. As already introduced in the previous pages, desimbedding by mechanisms resulted from the division of direct experiences of daily dimension life processes, and the appearance of experience vacuums that are filled – embedded – with abstract meanings. These voids are supplemented by symbolic tokens: particular elements that are filled with meaning and store the core values of social functioning.

It is relevant to highlight that the disembedding phenomenon is not exclusive to contemporaneity. However, the phenomenon could be considered one of contemporaneity's most fundamental features, due to the large dimensions attained. Ancient communities, in which on-site conviviality was central to relationships, have been replaced by situations increasingly linked and mediated by unknowns – people and groups who we do not know and, most likely, will never meet. Social relations are de-contextualized and relocated by indefinite extensions in relation to time and space. As such, manipulation of symbolic tokens is an inseparable part of modern life, since experimentation occurs mostly through symbolic meanings assigned by others.

Everyday modern life sees direct contact, with sets of sensations and perceptions that provide meaning, intermediated by a stream of information that alters the perception of the experience itself and the meaning ascribed to it (Sant'anna, 2009). Our choices and experiences are established by confidence in signs and speeches around objects subject to our choice, and they refer to senses that surpass our direct experimentation. We live in a *parallel world of action*, in which one sees the blooming of institutions between oneself and the world, and those institutions cannibalize one's direct and concrete experiences with the world (ibid.).

Thus, by underlining the disembedding mechanism, one also evinces the reflection of this phenomenon in the re-embedding mechanism promoted by expert systems. Re-embedding, together with desimbedding, promotes a reappropriation of social relations by binding them together (Giddens, 1991). The existence of an expert system related to information technology promotes the effects of desimbedding of direct relationships between social subjects with each other and with objects. It also promotes a continuous mechanism of re-embedding. The latter involves the re-signification of people, relationships and objects not by the experience per se, but by signs that tokens carry, and the meanings previously built around those signs and relationships. The more the disembedding processes are produced, the more the power strategies of symbolic tokens and of expert systems are strengthened (ibid.; Sant'Anna, op. cit.).

Expert systems are the main disembedding mechanism. They continuously and ubiquitously influence contemporary modern society. One of the most significant features of expert systems is that, compared to the general public, they securely authenticate their capacity and legitimacy. Expert systems are systems of technical excellence and professional competence that organize markets and areas of material and social environments (Giddens, op. cit.). Expert systems transcend people and technical tools. These technical instruments, despite giving materiality to expert knowledge, only consolidate what gives them form, i.e. abstract expertise.

Just like symbolic tokens, expert systems are considered disembedding mechanisms, since they nullify the social relations of their immediate context. These two types of disembedding mechanisms infer and effect the separation of time and space as a condition for trust in experts. Therefore, in the same way that a symbolic token detaches an experience, the expert system guarantees expectations through a distancing

of time and space. The expansion of these social systems is caused by the impersonal nature of the assessment of technical knowledge, and by public criticism, which is also the basis for the production of technical knowledge (ibid.).

One of the central points for understanding the concept and transaction of expert systems is the comprehension of *deposited reliability*. The relationship with experts in Modernity involves the acceptance of a certain degree of properly calculated risk (Beck, op. cit.; Castro, Peixoto & Rio, 2005), of which the individual is aware. Expert systems provide assurance of expectations in differentiated relations of space and time. Humans retreat from time and space and begin not to trust other human beings, instead trusting a body of knowledge legitimately operated by unknown men and women, based on a belief in technical-scientific reason.

Technical-scientific reason is embodied by manufacturing processes, and it enables the production, distribution and consumption of goods and services in market dynamics. Therefore, one does not consume a product because one trusts the producer, since one does not even know who that person is – or those people are – but due to confidence in the knowledge accumulated and synthesized by industrial processes (Guaragni, 2011). Thus, trust is forged between man and object – the latter being the materialization of the convergence of technical knowledge in which one trusts. We are linked to expert knowledge continuously and not only occasionally:

Simply by sitting in my house, I am involved in an expert system, or a series of such systems, in which I place my reliance. I have no particular fear in going upstairs in the dwelling, even though I know that in principle the structure might collapse. I know very little about the codes of knowledge used by the architect and the builder in the design and construction of the home, but I nonetheless have "faith" in what they have done. My "faith" is not so much in them, although I have to trust their competence, as in the authenticity of the expert knowledge which they apply - something which I cannot usually check exhaustively myself. (Giddens, op. cit., p.27-28)

The transubstantiation of technical and scientific knowledge that comprises expert systems is less striking in relation to the reliance of a lay person on an expert. It occurs as an act of faith (ibid.). However, this statement should not be simplified. There is an element of inductive knowledge in the confidence that lay people have in experts, called the *pragmatic element of faith*. It is based on the experience that expert systems operate as they should, and that they are reviewed and regulated. Expert knowledge can be put to the test and is based on excellent performance. Trust is managed in an impersonal way: testing and training is conducted to evaluate technical knowledge beyond public criticism (ibid.). Even facing regulations, reviews and criticism, nothing alters Giddens' view that all disembedding mechanisms cause a conduct of reliance.

A new understanding of trust emerges with respect to the absence of concrete evidence, which facilitates comprehension of different technical procedures, systems and codes, and the persuasion that their operation is – in most cases – effective and safe. Moreover, transparency of knowledge, understanding of procedures, and personal experience of products renders trust in expert systems rather unnecessary. This is

noticeable in terms of the vast amount of specialized knowledge available on the internet, and highly accessible to lay people, making formerly "restricted" knowledge more accessible and changing trust relationships.

With the above reservations in mind, Miguel (1999) sees similarities between trust in expert systems, and trust in shamans and sorcerers in traditional societies. The similarities are evident when considering the trust placed in medical doctors in cases where the lay patient is unable to evaluate the adequacy or inadequacy of the treatment recommended by the expert. In a related effort, presenting a comparative study between modern society and the ethnography developed on the !Kung San people of the Kalahari Desert by Lee (Giddens, 2012), one could identify *guardians of tradition* as possible equivalents of modern specialists; as providers of abstract systems that govern everyday life.³³

Lee's study (1984 *apud* Giddens, op. cit.) points to the central role of guardians regarding ritual as an element of tradition maintenance. For Giddens, tradition is either related to time or it is time; since the past is constructed to have influence on the present and also on the future, once practices are constructed to organize what is forthcoming. Traditions are connected to persistence and, to this purpose, to an attachment factor, considering that they are connected to the collective memory (Halbwachs & Sidou *apud* Giddens, op. cit.). In traditional societies, the attachment fixation is passed on by the guardians of tradition through the notion of *formulaic truth* (Giddens, op. cit.).

In terms of *formulaic truth*, the statement is less important than its ritual and performative language (*ibid.*). The formulaic nature is the real mechanism of truth, and it would not be possible to consider the statement as an impediment to access this truth – as the ritualistic language of traditional societies is not always clear or accessible. The criteria of *truth* are not allocated to statements, but to the events caused by them and related to them (*ibid.*). In this context, the abilities of the guardians of tradition have more to do with the power of tradition than with the dominion of esoteric knowledge.

However, despite the fact that guardians of tradition are the suppliers of abstract systems with the most impact on everyday life, some considerations must be made. The guardians are not experts and the information and knowledge that they have access to is transferable only within the specific group to which they belong (*ibid.*). Similarly, they can never be considered lay people, due to the status they have. Hence, a traditional expert would be the one whose verbal utterances could be directly designated by the "reality" of a particular context (Boyer, 1990). In the traditional order, status is more important than the competency to legitimize a guardian. On the other hand, in modern society, expert skills can be learned by those determined enough to do so:

In contrast to wisdom, competence is specifically linked to specialization. A person's competence as an expert is coterminous with her or his specialism. Consequently, although some forms of expertise might command wide public

³³ For more, see: Boyer, P. (1990). *Tradition as truth and communication: a cognitive description of traditional discourse*. Oxford: Cambridge University Press.

esteem, a person's status within one abstract system is likely to be completely beside the point within another. This situation decisively influences the nature of trust relations between experts and lay individuals, as well as trust in the abstract systems which the experts 'front'. Trust no longer depends upon a respect for the 'causal relation' believed to hold between a guardian and formulaic truth. The skills or knowledge possessed by experts in so far as they express their commitment to the mastery of a specialism (Giddens, 1991, p.89)

To a certain extent, information is central to the expert condition in modern societies, besides legitimation, recognition and confidence in proficiency. However, this type of information is required only by the expert, or by those who offer services and products resulting from expert processes, since "the technical expertise and professional skillfulness are formally required from the information professionals, but not from the user" (Barros & Lima, 2012, p.10). As such, information services are also seen as expert systems.

Specialization disembodies, decentralizes and does not connect to a formulaic truth, but to a belief in the possibility of knowledge correction. Belief in expert systems does not happen as esoteric belief, but as processes of loss and re-appropriation of skills and legitimacy recurrently put to the test in reflexive processes. The specialist institutions are mutable. They are based on impersonality and are independent of circumstances, despite dealing with them. Without minimizing the properties of specialists, expert systems are seen as organizing structure.

This structure is revealed in the specialization and in the prototype of the specialist as a bureaucratic employee, who develops specialized tasks of his or her function (Giddens, 2012). However, it is important to note that not every specialist acts in such a manner. Regarding the bureaucratization of knowledge and work, Giddens is not in favor of Max Weber's (1864–1920) view that considers the world to be imprisoned in iron cages³⁴ of bureaucratic domination. He is also critical of Michel Foucault's (1926–1984) conception that considers the scientific discourse as apparatuses of control and domination.

Although highly commending Foucault's work, Giddens's main critique of the French scholar is the notion of an incapability of action from the subject. For him, Foucault developed an analytical model that privileges the structural aspects of analysis over the capability of action and agency, being highly functionalist (Gomes, Almeida & Vaz, 2009). However, in later studies, Foucault does consider that subjects maintain a certain degree of autonomy, beyond the devices of power/knowledge. In this sense, there are elective affinities between the theoretical works of both authors who sustain this study, despite the possible differences (ibid.). The study of power and its effects of

³⁴ "Weber realizes that the autonomization of rational action subsystems regarding purposes represents a threat to the freedom of individuals. Thus, the bureaucracy, in the degree it constitutes itself as system that orients and expands itself based on an instrumental type of rationality, it ends the threat of enclosure and of loss of freedom. According to Weber, this would be the price to be paid for the progress arising with rationalization: a disenchanted and utilitarian world without freedom, a *cage of iron*" (Cardoso, 2008, p.272) [free translation by author].

domination is therefore incomplete if it ignores the idea that there is always potential for rejection and disagreement, despite the strategic games of such power.

Giddens's most important developed theory, structuration, considers the analysis of two instances: agency and structure. The relationship between structure and agency is transformative and not dialectic, because they are not simultaneous and symmetric (Bhaskar, 2008). Structures are previous to actions. As Foucault explains, structures coerce action by a set of internal relations that act upon social individuals, thereby constraining them. At the same time, the agency of those social individuals also reproduces or transforms the conditions of social production, as stated by Giddens. This means that despite being created previously, social structures are also resultant from social agency, and capable of transformation (ibid.).

As aforementioned, the relationship between expert systems (structure) and lay people (subjects) is not a one-way street, but a dialectical flow. Reviewing Giddens and Beck, Professor Julia Guivant (1998; 2001) investigates the relationship between lay individuals and expert systems in *risk society*.³⁵ She acknowledges that expert systems no longer benefit from fully codified knowledge, access to which is denied to lay people. Thereby, lay people became able to understand, to reappropriate, to reinterpret and even to transform expert knowledge. In the current context of Modernity, social actors have new forms and degrees of trust in the different expert systems. If, at the stage of so-called *simple Modernity*, trust was considered blind, social actors now choose to rely on expert systems in a more calculated and deliberated manner (ibid.).

The new relational model, although not necessarily interactive, has witnessed the heyday of different institutions as intermediaries of social interaction, which are also sources of information and, in turn, expert systems. For example, journalism is consolidated as the main source of information on various issues, and as a relevant filter for various subjects, given that media is consolidated as a result not only of technology, but also of the relationship established with the public (Barros & Lima, op. cit.). Similarly to experts, the media represents an arena of broad dissemination of ideas and values, of high symbolic efficacy, and it has also been transformed by its growing reach resulting from increased access to information.

The study of expert systems is especially relevant in the context of the appreciation of symbolic aspects. Consequently, the appreciation of immaterial labor as a recent response to changes in the industrial sector is also relevant. The topic corroborates the emergence of a so-called *cognitive capitalism* (Keller, 2007), also known as *postmodern capitalism, informational-, knowledge- or creative-economy*.³⁶ This kind of

³⁵ "The notion of risk is central to modern culture today precisely because so much of our thinking has to be of 'as-if' kind. In most aspects of our lives, individual and collective, we have regularly to construct potential futures, knowing that such very construction may in fact, prevent them coming about. New areas of unpredictability are created quite often by the very attempts that seek to control them" (Beck, Giddens & Lash, 1994, p.vii)

³⁶ This study does not intend to develop an approach to expert systems and information from an economic perspective, but some of the authors to whom this work refers have developed studies with

economic logic focuses on the recognition of immaterial capital, in which knowledge is considered the primary productive force (Gorz, 2005).

If the source of value was previously the simple abstract work, it is now the complex work that is foremost valued. Referred to as *immaterial*, it cannot be measured by traditional standards (ibid.). This type of work does not result directly in durable goods, despite controversies. Thus, the work based on the continuous exchange of information and knowledge produces intangible goods. Since the 2000s, Antunes (2009) assigns this trend of the increase of works with a larger intellectual dimension. The trend involves, among others, the expansion of the service sector and the growing appreciation of professionals working in information, communication and knowledge. However, the work considered immaterial combines with the work considered material or simple. Therefore, one should consider the enchainment between both material and immaterial works.

The relation between material and immaterial labor is given, among others, in the production of merchandises. The prestige of immaterial labor is evidenced by the capital gains of products, which increasingly have been filled by intellectual and communicative activities (Hardt & Negri, 2004). The extension of immaterial labor jobs is highly relevant to the production system (Gorz, op. cit.). The appreciation of so-called immaterial work – i.e., intellectual, creative, cognitive and communicative – in the contemporary economy is notorious, since it becomes the center of value creation.

In most sectors of the market, profit results mainly from aggregate symbolic value. Specifically in the fashion market, this marks the consolidating process of the search for aesthetic quality, for symbolic value and for coherence with fashion trends. As a result, the professions of designer and trend researcher are among the best paid in the industry, considerably exceeding the remuneration of seamstresses.³⁷ Although fashion products remain material goods, immaterial activities including design, fashion trend forecast, advertising, publicity, and management, have become pivotal as part of an expert system that organizes and synchronizes the entire fashion industry and market.

4.2 EXPERTISE IN FASHION

As stated in Chapter 2, besides characterizing the intersection between consumption and production, fashion exceeds the actions of dressing and consuming, involving aspects of cognition, creation, sales and promotion. Due to fashion's systematic organization, neither consumers nor designers are the undisputed masters of fashion.

political-economic approaches. Thus, some terms are used with regards to the contextualization of the centrality of information, rather than with the intent to make considerations about the economic and political implications of cognitive capitalism and the so-called Third Industrial Revolution.

³⁷ The salary of a designer ranges from R\$ 1,600 to 11,113, and of a trend researcher between R\$ 2,000 and 8,641 (Carreira Fashion, 2014). On the other hand, the salary of a seamstress ranges from R\$ 681 to 1,129 (Catho, 2014). In Germany, a seamstress makes from 1,552 – 2,067 € a month whereas a fashion designer receives offers from 2,740 to 3,844 € monthly, and trend researchers from 2,631 to 4,650 € monthly (Gehalt.de, 2016).

The systematic condition emanates from interactions between various forces, factors and actors. Throughout the whole fashion chain, there are various expert systems responsible for processes of ideation, innovation, and the distribution of fashion products.

The model developed by Aspers and Skov (op. cit.) has been presented in Chapter 2 with the division of fashion organization from a business perspective into [1] production; [2] sales and [3] consumption. The first level – fashion production – involves both the material and immaterial works of fashion. Immaterial work is referred to by the authors as *conceptual production*. This category corroborates the definition proposed by Antunes and Hardt & Negri, and adapted to fashion by Keller, as immaterial labor.

The Scandinavian authors consider, although broadly, the performance of conceptual fashion producers in various actions and reinforce the use of the plural form *producers* as a demonstrative effort in acknowledging the existence of a wide range of expertise (Aspers & Skov, op. cit.). Accordingly, within the current boundaries of a globalized fashion system, fashion production cannot be reduced to a single trader (ibid.). The idea of multiple expertise bespeaks the relevant transformation towards a systemic structure that includes different levels and figures (Riello, op. cit.).

In Aspers and Skov's systematization, design schools are presented as professional specialist training centers and as spaces that feed the expert systems, because universities are the origins of scientific research. Trend forecasters, fairs and fashion magazines were also presented; conforming to the areas responsible for the identification (and sometimes the creation), coordination, dissemination and adoption of fashion trends. Thus, with a coordination logic, these areas minimize uncertainties regarding supply and demand in the fashion system.

The fashion industry is organized according to the flow of consumer goods produced through complex networks, concatenating the value chain. As the literature suggests, the conceptual stages that involve knowledge and cognitive work predominantly affect the other production chain links and tend to be the ones that most influence the value chain and the final value of products (ibid.; Aspers & Skov; op. cit.; Godart, op. cit.). As aforementioned, in the apparel value chains, the tasks qualified as creative stand out as key in shaping the whole chain, articulating conceptual and material production.

Regarding the linkage of the conceptual work with the material work, and the centralization of expertise in the judgment of taste – which defines what would and would not be valued in the canons of fashion –, a briefly historic effort will be further presented with the goal of summarizing the crucial aspects of fashion expertise in a trend setting; which, in step with the fashion dynamics and industry itself, has been disputed, altered, re-appropriated and remodeled over the years.

4.2.1 Expertise in fashion trend

One of the first centers of expertise, not only for fashion, but for the majority of crafts, were the guilds (Monçores, 2013a). These were medieval workshops, whose task

was to regulate, control, and teach crafts to apprentice artisans. The guilds were spaces where artisans drew and developed artifacts in collective production, segmented by area. In the production activities of then luxury goods – such as furniture, tableware and textiles – guilds began to weaken between the seventeenth and eighteenth centuries due to the rise of Royal Manufacturers³⁸, in response to the need to produce in larger quantities (Cardoso, 2008).

Royal Manufactures dealt with the organization of market access and the teaching of crafts. However, they invested more in teaching conception and design than in practical production activities. The disruption between manufactures and guilds involved the separation between design and production processes as a strategy to develop products reproducible by machines, facilitating the introduction of new products to markets (ibid.). However, there were differences between the machinery aesthetic and what people thought was beautiful or tasteful, and the state needed to intervene in order to reduce this difference. For example, the English state promoted laws that encouraged the formation of art and design education centers for the people, with the purpose of educating taste. Similar projects occurred throughout the nineteenth century, a period in which institutions such as vocational schools of arts and crafts, museums of decorative art, and arts education in children's schools grew significantly (Monçores, op. cit.).

The centralization of the specialized knowledge of guilds, Royal Manufacturers and craft schools indicates the low significance of early fashion expertise, given that they were trainers of taste and style mostly in terms of furniture and decorative arts, affecting fashion production only in respect to the production of textiles (ibid.). However, the centralization system of manufacturers proposed by Jean-Baptiste Colbert (1619-1683) presents more similar outlines of a strategic ordination between the textile industry, tailors and seamstresses, with a politically nationalist strategy (Godart, op. cit.).

The centralization process that occurred in France during the reign of Louis XIV (1643 - 1715) was the result of a double political process. On the one hand, France was consolidated as a major European cultural power, committed to and successful in becoming "the referee of Europe" in matters of taste (Laver, 2008).³⁹ On the other hand, Versailles and Paris established themselves as political, cultural and economic centers. The absolute monarchy of the Sun King – *le Roi-Soleil* – generated an unprecedented centralization of power. The centralization of cultural *puissance* also was also evident in

³⁸ Royal or Crown Manufacturers existed in many countries and has as main goal to centralize the production of goods. In France, the Crown Manufacturer processes began with the *Manufacture Royale des Gobelins* in 1667, when Colbert bought the buildings of a dyeing and tapestry workshop – firstly build by Jehan Goblin, who settled the business in the 15th century - for the crown and created the Manufacture des Gobelins (Monçores, op.cit.).

³⁹ England was also considered a great European power of the time. However, in terms of cultural exportation, France had greater prominence, mostly due to actions accomplished by the *Roi Soleil* with the intention of establishing French supremacy. Burke's studies evince that Louis 14th influenced but was also influenced by other sovereigns, and would always try to surpass them, in a constant race for supremacy, exploring the tools with which he built and expanded the public image of the French king. See more in Burke, P. (1994). *The fabrication of Louis XIV*.

the dissemination of the French manner of dress as a reference for all Europe. The centralizing situation in the judgment of taste in dress was unprecedented, since the attention of aristocrats and the court had previously been disputed by Spain, England and the Netherlands.

The centralization of French fashion was a meticulous tactic of King Louis XIV and the minister Colbert. Its goal was to occupy nobles with matters considered futile, distracting them from political intrigues and solidifying the dominion of France in terms of political means and matters of taste (Laver, op. cit.). Colbert, whose name is given to Colbertism – an economic and political doctrine of the 17th century –, was the general minister of finances in France. He declared that fashion was to France what the golden mines of Peru were to Spain (Godart, op. cit.). This suggests the recognition of textiles as highly significant, moving them from engines of economy, to cultural symbols and consolidating the origins of French fashion (Leventon, 2009).

Figure 34 La Bataille de Zama



Source: Manufacture des Gobelins; Musée du Louvre (Wikipedia, n.d. I)

During the reign of Louis XIV, Colbert created besides the Royal Manufacturer of Gobelins⁴⁰ (Figure 34) an industry of fine laces. The king, anxious to incentivize Colbert's business, used laces as *plastron*⁴¹ and demanded that all court members use this type of loose bow collar, with the lace *point de France* produced in the minister's manufacturers. The *point de France* and *point de Venisse* laces were highly elaborate and expensive at the time (Laver, op. cit.).

⁴⁰ The gobelins are traditional illustrated tapestries made by the *Manufacture Nationale des Gobelins* in France since the 17th century.

⁴¹ *Plastron* is a type of tie, a silk scarf tied around the neck. The name indicates Croatian origin, having been appropriated first by the French army and later by the court of Louis XIV. (Laver, 2008).

Already at the beginning of the 18th century, the prestige of the Versailles court triggered throughout Europe an enchantment that unleashed a willingness to accept, in matters of fashion and taste, the dominion of France (ibid.). The dominion was also particularly strong when considering etiquette, hairdressing and civility. From that point, elegant and top quality apparel, at least for the nobility, indicated a unique origin: France.

Figure 35 Queen Marie Antoinette of France



Source: Joseph Ducreux; Versailles (Wikipedia, n.d. II)

Marie Antoinette (1755-1793), despite her Austro-Hungarian origin as the daughter of Holy Roman Emperor Francis I and the Holy Empress Maria Theresa of Austria, established herself as a landmark in French history, giving rise to "fashions" that were copied throughout Europe (Figure 35). Indeed, Marie Antoinette could be considered a true *fashionista* (Erner, 2005). The colors, shapes and textures of clothing enchanted the Queen. She cared about and put effort into choosing the craftsmen who would sew her clothes, based on their *savoir-faire*. Her favorite dresses were from the expensive and prestigious dressmaker Rose Bertin (Craveri, 2006). However, the lights, the brightness and prestige were not recognized as Bertin's. The true artist, if not the dress itself, was the Queen of Fashion.

Researchers believe that Marie Antoinette saw in fashion a means to escape the hostility of the court, estimating an annual spend on ornamental dresses and elaborate hairstyles that would correspond today to seven million dollars (ibid.; Weber, 2008; Sant'anna & Expressão, 2011). Marie Antoinette used fashion as a political tool, as a way

to enhance and maintain her dominion and notoriety in times of risk. Through her appearance she emphasized her sovereignty, not in an attempt to intimidate enemies, but rather to dazzle, to stand out.

Even though she cannot be considered a fashion expert from the perspective of manufacturing training and institutionalized knowledge, Marie Antoinette was a central figure and had great influence in the creation of fashion canons. She was, in fact, the ultimate fashionable reference, dictating trends in dresses, hairstyles and makeup (ibid.). Her dresses were copied days later by nobles of Versailles and Paris and by wealthy bourgeois, according to the dialectical social classes' imitation-distinction model, presented in the previous pages of this work.

Figure 36 Elisabeth of Austria wears Worth



Source: Franz Xaver Winterhalter; Hofburg (Wikipedia, n.d. III)

During the nineteenth century, other queens played a central role and were also considered great queens of fashion, such as Sissi (1837-1898) (Figure 36). Initially Elisabeth of Bavaria, later Elisabeth of Austria, and due to her marriage to the Emperor Franz Joseph I, Queen of Hungary, Sissi had a unique taste for fashion, diet and exercise. Considered one of the most beautiful women of her time, she had her dress models copied by the court and the wealthy bourgeoisie – just like Marie Antoinette.

Similarly, Queen Victoria (1819-1901) was an outstanding figure. The most copied English queen, she inaugurated a clothing style that until today is referred to as the *Victorian style*. The style was a faithful reflection of how Victoria dressed. Initially, it expressed the innocence and sensibility of her youth, with pastel color tones, delicate details such as high collars, ruffles, puffy sleeves, ties and corsets. It was Victoria who

started the tradition of white wedding dresses in the West. According to Worsley (2010), white expressed the purity of the love between bride and groom, but it also indicated wealth, since it gets dirty easily and is costly and laborious to maintain.

The death of King Albert (1819-1861) – her cousin and husband – marked the second phase of the Victorian Era in England (Shearman, 1987; Strachey, 2001). In terms of the Queen's apparel, the death of the King influenced the closing of necklines and the sobriety of the colors; darkening the dresses of Victoria, as well as all over England. The body was covered, hidden and squeezed in dark clothes that sought to deny and repress sexuality (Brandini, 2007). The aesthetic code was of extreme grief. The era is considered remarkable for capitalism and industrialization, and the reign of Victoria alongside Albert boosted the growth of capitalist ideas in the English and European societies (ibid.).

Throughout the 19th century, consumption became an important part of urban life, which was made possible by large-scale industrial production. This gave rise to various practices, such as the desire to know what new products would be. As a strategy for the dissemination of these products, fairs and exhibition halls successfully took place during the 19th and early 20th century. The expositions informed the public about what novelties would occupy their homes in the near future. For the consumer, they were generally the first point of contact with new products. Therefore, exhibitions could also be considered experimental spaces (Cardoso, op. cit.).

According to the data raised by Monçores (op. cit.), there were over 20 big international expositions between the years 1851-1931, all with the goal of presenting new, unique and exotic inventions, although in many cases the products were already known to industrials, and were new only for the end consumer.⁴² Nonetheless, novelty remained a relevant rationale for a visit to such expositions. The ideas of novelty and newness reinforced positivist connotations of progress, since everything that was new was considered to be superior and “evolved.”

The first big exposition, in terms of relevance and scope, was The Great Exhibition in London, promoted by Prince Albert in 1851 (Figure 37). Besides nationalist interests, the event promoted international commerce, industry and art, presenting England as an industrial leader and significant empire, but also exhibiting the industrial successes of other nations (Friedman, 2008). From its beginning in May until its closure in October, the exposition attracted over six million visitors. It also served to boost British nationalism with great success. Prince Albert and the culture reformist Henry Cole developed an institution and encoded a symbolic language through which nations would define themselves, their counterparts and the changing world (ibid.).⁴³

⁴² The author listed: London 1851, Dublin 1853, London 1862, Dublin 1865, London 1871, Paris 1878, Sydney 1879, 1980, Amsterdam 1883, New Orleans 1884, 1885, Edinburgh 1886, Barcelona 1888, Dunedin 1889, 1890, Antwerp 1894, Paris, 1900, Jamestown (EUA) 1907, London 1911, Philadelphia 1926, Antwerp and Liege 1930, Paris 1931 – excluding regional expositions and fairs. (Monçores, op. cit.).

⁴³ “Upon its conclusion in October, most observers deemed the Exhibition [...] a resounding success. Prince Albert and Henry Cole had fashioned an institution and codified a symbolic language through

Figure 37 The Great Exhibition of the Works of Industry of all Nations Hyde Park – 1851



Source: Dickinson Brothers (Wikipedia, n.d. IV)

Universal expositions were spaces to monitor product releases and novelties, at least for the upper-middle class. The expositions also worked as means of market organization and coordination, mainly because they played a part in buying and selling products, due to the wide media coverage, the mobilization of participants, and the frequency with which they happened. Businessmen, buyers and product re-sellers, as well as the press, acted as novelty thermometers and trialed what could and should be launched in the market. The hosts of the exhibitions became judges of novelties, regulators of the new; encouraging the acceptance of “progress” (Monçores, op. cit.).

Under similar parameters, the second-best-known exhibition took place in Paris in 1867, the *Exposition Universelle d'Art et d'Industrie* - Universal Exhibition of Art and Industry. The exhibition, with political goals in addition to the economic, was promoted by Napoleon III (1808-1873) in order to consolidate the power of the Second French Empire. During the seven months that it was open to visitors – between April and November – the exhibition had an audience of over nine million people, and it is therefore considered the greatest international exhibition of the period.

British, Irish, American and Canadian exhibitors shared space with industrials from France and the French colonies. In addition to industrial products and exotic attractions brought from the colonies, the Empress Eugenie (1826-1920), wife of Napoleon III, encouraged the exhibition of the personal belongings of Queen Marie Antoinette (Spinosa, 2008). This exposition reaffirms the role of the French aristocracy as leading creators and diffusers of “fashions”, especially when considering the reference that England had become in the same sector.

which nations would define themselves, their peers, and the rapidly-changing world in which they lived in the coming decades” (Friedman, op. cit., p.9).

Thenceforth, France resumed its role of leadership, and Paris took over the title of fashion capital. In 1900, 20 *haute couture* houses took part in the French Industrial Exhibition and by the 1925 exhibition - *Exposition Internationale des Arts Décoratifs et Industriels Modernes* – there were more than 60 *haute couture* houses (Moncores, op. cit.). During this period, the segment was already considered very profitable for France, accounting for over 15% of the country's exports. The emergence of *haute couture* gave rise to somewhat distinct aspects of the creation and production of fashion. If before the *couturiers* needed to visit customers in their homes, now the customers were the ones who had to move to the *couturier*, who would decide if he/she would be willing to serve the client.⁴⁴ The *maisons* were born.

Haute couture was inaugurated years before, in 1857, when Charles Frederick Worth (1825-1895) opened a sort of store-laboratory in Paris, which turned the tailor, previously a common artisan profession, into a creative, modern artistic genius (Lipovetsky, op. cit.). Worth said that the creator was the great "master of fashion" and not the one who wore the creations. Soon, the *couturier* was not working to the requirements of a customer, more respected than she was. The aristocracy still played an important role in deciding fashion parameters, but with the raise of *haute couture*, the aristocracy merged with the high bourgeoisie, and no longer had exclusive access to novelty (Müller, op. cit.) (Figure 35).

Considered the father of *haute couture*, Worth is also recognized as a precursor of fashion brands, having pioneered signed stamp labels, legitimizing the merits of his creations. The idea of *haute couture* combined innovative and glamorous clothing, whose very high price was justified by added creativity (ibid.). Worth also introduced fixed dates for the launch of apparel products, in order to plan their collections with fabrics and colors of cards developed, tailored to each station. The *couturier* was responsible for organizing a timetable for the fashion market in the nineteenth century.

Like a famous painter, Charles Worth did not decide on the theme of his work, but imposed his treatment upon it. His effort as *createur* implied not only the apparel's workmanship but, most importantly, its creation. Worth did not consider himself as a supplier, he wanted to be like his clients, their confidant. He explained that because he belonged in their world, he could understand the expectation of a queen or a czarina (Erner, op. cit.). However he remained the only judge of his creations. The *couturier*-oracle was the one who decided what fabric, color or style he would chose for a creation. The actual idea of *haute couture* would put the clients in a submissive position (Müller, op. cit.).

Just like Worth, other designers gained great renown as creators and achieved artistic notoriety. They became names of reference when considering the creation of new

⁴⁴ Rose Bertin, the dressmaker of Marie Antoinette, was proud of having one of the most famous and beautiful clients. The Queen, the Parisian bourgeoisie, but also provincials, who she would treat with disdain. When the latter would come to her seeking the latest fashion, she would tell an employee to show them the fashions of the previous month (Müller, op. cit., p.18).

styles of dress, and were copied by fashion designers worldwide. The Frenchman Paul Poiret (1879-1944) entered the fashion market around 1910, and in a short time he had dressed the most admired, wealthy and prestigious characters of Parisian society in the early twentieth century. He is recognized as a major contributor to the rise of fashion as a market. In the 1920s, Gabrielle Coco Chanel (1883-1971) was considered a personality.

The oratory of couturiers itself reaffirmed the magic with which they intended to infuse their work. Chanel called the practice of naming the creations as if they were works of art *poésie couturière*. The explanation for where the inspiration for a collection came from is found in inspiring myths, romantic stories, literary reveries, references to art: information ready to be confirmed and spread by fashion journalists, the *stylistes*. It is certainly more poetic and also more mythical to suppose that Christian Dior (1905-1957), in his creative retreat in Coudret, southern France, decided that green is no longer fashionable, and that an artistic breath suggested he should raise the hem of skirts even more (Erner, op. cit.).

For an inexact period, the myth of the demiurge *couturier* who imposed on the world their ineffable essence through a single, free and thus artistic creative act, as well as being an arbitrary construction, was spread by couturiers themselves. The myth, not by chance, is a romanticized and absolutely abstract expression of the creative work. This representation deliberately hides the vulgar and common aspects of production systems, moving designer creations away from the "factory floors". Designers thereby perpetuated for themselves a fanciful and erroneous idea of the production of fashion garments and accessories.

Fashion has never been a phenomenon of isolated or separated subjects. Neither is it the result of an exclusive relationship between textile and fashion. Despite being powerful and relevant, both fields are insufficient to describe the fashion phenomenon and system. It rather consists of multiple individuals, and collective interactions among creation, manufacture and distribution, and the links arising from these interactions are numerous when considering the integration of the aspirations and practices of consumers (Maillet, 2014). The fashion system has established and continues to establish connections and relations with other areas of the cultural industry.

Fashion and fashion designers have maintained a relationship with mass culture, which in itself is highly representative of the fashion system. In fact, so-called fashion-journalism arose shortly before, in the 1920s, despite the fact that fashion content has occupied the pages of publications since the seventeenth century. Especially during the nineteenth and twentieth centuries, there was a proliferation of discourses on fashion trends in magazines. This growth is representative of the wide influence of media in broadcasting fashion trends as positive in the context of fashion. The trends were an object to be displayed, analyzed and recorded as an aesthetic manifestation (Lipovetsky, op. cit.).

Also in the twentieth century, during Hollywood's Golden Age (from the late 1920s to the early 1960s), the settlement of fashion trends was subjected not only to the

press, but also to mythical figures of the cinema, such as Marlene Dietrich (1901 - 1992) and Greta Garbo (1905 - 1990). Along with other “stars”, they acquired the “power” to gainsay trends of *haute couture*. The *haute couture* disciplinary order revealed the logic of indeterminacy, facing other actors in the process of fashion choices. According to Lipovetsky (op. cit.), the “fashion of the year” would only appear after certain customers and the press converged towards a specific model.

Monneyron (2005) considers two ways in which fashion magazines are influential regarding the dissemination of trends. The [a] first is the selection of the models which will characterize the season, and the [b] second is the creation of an ambience, which, if it is correctly reproduced may identify a certain time. In one way or the other, fashion magazines work to ensure the promotion of fashion creation and consumption (ibid.).

Barthes (2009b) considers that the specialized press in fashion works by creating associations – not necessarily conforming – between what has been decided by the experts and what is to come, using a particular rhetoric. At the apogee of the fashion press, a fashion trend was recorded at the same time as it was announced as such – echoing the previously mentioned concept of *self-fulfilling prophecy*. Thus, the fashion press invested – by necessity and convenience – in a rhetoric full of categorical imperatives; rhetoric which is an inseparable part of the discourse presented in fashion magazines.

Public credibility of the discourse of the fashion press was accrued over many years. Contemporaneously, the type of performed speech is criticized both by the field of journalism, as by the field of fashion. Although still frequent, the authoritative style began to change only in the second half of the twentieth century. The general female magazine provides information following its particular dictates. The so-called editorials are often composed of a short text for the opening sequence of pages associated with explanatory subtitles to the photos – or looks – of the the page, the name given to the editorial is usually composed of short sentences, which are both suggestive and metaphorical (Kronka, op. cit.).

In the last pages an effort has been made to introduce, albeit briefly, fashion journalism as expertise in the launch, election and dissemination of fashion trends, since it still operates in the diffusion of fashion trends. In a complementary way – and particularly relevant for the scope of this dissertation – the expertise of fashion journalists and fashion editors in the election and diffusion of fashion trends and the canons of good taste culminated in the creation of a new activity: the coordination of the fashion industry conducted by style coordinators and stylists.

Even with the efforts of the couturiers to keep the myth of the *couturier* alive through rhetoric, the charm of their creations and the support of specialized media – cinema and press –, the first high-fashion houses suffered a heavy impact during the

World Wars. The phase enabled the emergence of *prêt-à-porter*⁴⁵ and ready-to-wear⁴⁶ as a strategic solution to meet a public eager to consume, but without the purchasing power to invest in *haute couture* products, given the context of cost containment.

In the years after the Second World War a new society was configured due to technological advances, and mostly due to the cultural and economic hegemony of the United States (Sant'Anna Müller, 2011). The values of this new society no longer corresponded to the values propagated by traditional French *haute couture*, and a process of modification took place. According to Sant'Anna Müller (ibid.) the impossibility of the maintenance of *haute couture* as it had been before the war can be analyzed by four distinct aspects: [1] the economic unsustainability of the fashion houses; [2] the new concept of elegance imposed in the 1960s; [3] the new profile of elites and; [4] the diffusion of fashion products and consumption.

Corporately, the manifestation of *prêt-à-porter* and ready-to-wear expanded the formalization and organization of production, work, and commercial and aesthetic strategies on the fashion stage. As an industry, fashion operates by a logic of constant bets. The condition of unfamiliarity with the demand represents great risks for producers and, consequently, for the entire industry. Faced with so many uncertainties and the will of great designers being put to the test by journalists, the fashion industry found another expert system to centralize fashion and trend information in order to coordinate the supply and demand of products to be mass manufactured. The industrial engine of fashion was thus created.

4.2.2 Expertise in fashion trend coordination

The concept of fashion trend coordination dates back from the 1950s, and *prêt-à-porter*, when the mass production of garments arose, when the American ready-to-wear crossed the Atlantic.⁴⁷ With the success of the United States of America in the ready-to-wear model, a group of French women went to that country to study its successful and

⁴⁵ For Sant'anna Müller, *prêt-à-porter* has nothing to do with American ready-to-wear. "Therefore, *prêt-à-porter*, facing the new production system of seasonal trends, did not respond to revolutionary responsibilities, but to the authority that *Haute Couture* once had, to dictate the paths of the newly worshiped and the notion of elegance and sophistication to be pursued" (Sant'anna Müller, op. cit., 123-124). [Free translation by the author].

⁴⁶ *Ready-to-wear* refers to consumers buying clothes that are not made to measure. That is, consumers may select clothes already made in standard sizes from a series of proposals. The method involves the maintenance of stocks, sizing problems and the manufacture of large quantities. Although referred to as a result of World War II, ready-to-wear in fact dates back to the late 18th century (Waddell, 2013, p.23).

⁴⁷ Maillet (op. cit.) argues that trade associations between apparel and textile already in 1857 edited annual sample books that would increase product novelty working as a means of inspiration for dress makers and that Jean Claude Frères would have conducted work of novelty selection during the Universal Exposition in Paris in 1878. The same author considers the the year of 1937 as start date for the emergence of fashion consulting and coordination. At the time, consultants such as Fred Carlin gained notoriety working with "consulting and creation in textile", in his company entitled *Conseil en Création Textille* (ibid. p.6). However, I consider that only with the advent of industrial production of apparel the activity of trend guidance became truly active and dominant in the fashion industry.

modern enterprises. There, they learnt about not only the industrial production of clothing, but also about ideas of publicity, the power of Hollywood stars in the prescription of trends, and the importance of attractive distribution and communication. Their mission was to resurrect French fashion through these productivity missions in the United States.

Back in Paris, these ladies had as their mission to redefine French performance in fashion, after the creation of the Fashion Industry Coordination Committee that would provide different links of the industrial chain with exact and cohesive fashion trend recommendations. The young women addressed youth magazines such as *Le Jardin des modes*, *Elle* and *Marie Claire* (Müller, op. cit.), textile or chemical trade unions, and even retail chains (Maillet, op. cit.). In the different stages, these young women would work as stylists. The *métier* was mostly conducted by young women with good taste, and their role was to guide and counsel the development of fashion collections. They represented a supposed “autonomy” in the face of the former dictatorship of couture (Müller, op. cit.).

Coordination involves the effective planning and promotion of trends revealed into style direction – such as instructions in colors, materials and shape – for the whole fashion industrial chain, from chemical dyes to retail. The function of chain coordination was decisive at an industrial economic panorama of mass production that demanded a pragmatism so far inexistent in the free and voluntary creations of couture (Sant’anna-Müller, op. cit.).

With the complex fragmentation of the textile and clothing productive process, there was the need to prescribe aesthetic research, technical abilities and quality control at each stage – from the fiber to the end product, going through the stages of spinning, weaving, textile processing, printing, cutting, assembling and finishing - in a succession of deadlines. As a central figure of this organization arises the fashion consultant, whose function was to guide the clothing collections of companies in order for them to be in agreement with both the current aesthetic trend and the industrial productive system.

According to former fashion trend consultant Vincent-Ricard (op. cit.), consulting should be executed with a focus on the adaptation of aesthetics to the limitations of industrial reality. The work involved often debates with technical experts, merchandisers, and directors of textile and apparel. The rhetoric – once again – should persuade executives and industrialists for the results desired by the consultants to be achieved (ibid.). These well-qualified French women worked as consultants and not as designers, and this relationship between consultants and creative activities was central to the development of *bureaux de style* (Maillet, op. cit.).

From the end of the 1950s, consultants began to structure agencies called *bureaux de style*. The agency *Relations Textiles* was the first *bureau de style*, dating back to 1957. However, Promostyl is the most cited bureau due to the publication of the book *La mode* by its founder Françoise Vincent-Ricard. Since its founding in 1966, many other offices have appeared, several of them with editors, stylists, journalists and advertisers

as its directors. Maïme Arnodin - who had worked at the magazine *Jardin des Modes* and later in the warehouse *Primtemps*, and Denise Fayolle, who had directed the styling and advertising from *Prisumic*, together created the fashion consulting agency Mafia in 1968. Other sources consider that

Estas dos mujeres [Arnodin and Fayolle] conseguirán que las tendencias irrumpen en esos símbolos del consumo de masas que constituyen los catálogos de venta por correspondencia. En la década de los setenta, se crearán otros estudios de estilo, conscientes de la necesidad que acababa de nacer. La aparición de esta actividad consagraba la influencia de las tendencias (Erner, op. cit., p.40).⁴⁸

The concept of fashion trends as we understand it today was first used in a fashion context as a technical term in a trend book, *cahier de tendances*, edited by the *bureau Promostyl* (Vincent-Ricard, op. cit.). Until then, the word had been used in the field of economics, but in fashion, trends designated a different yet precise goal: to aid industrialists to prepare their collections up to two years in advance (Rodi, 2012). Trend books served – and continue to serve – as guides for orienting the production of future collections. The illustrated books presented guidelines in color, shapes and material and supposedly reflected the wishes of the consumer market. Fashion trends were presented by ambiances, atmospheres and proposals that would become reality in the upcoming season (Figure 38).

Figure 38 Drawings from trend book from Promostyl in the 1970s



Source: Promostyl (n.d.; I)

⁴⁸ These two women [Arnodin and Fayolle] succeeded in making trends into the symbols of mass consumption that are mail order catalogs. In the seventies, other style studies were created, aware of the need that had just been born. The emergence of this activity consecrated the influence of trends (Erner, 2012, p.40). [translated by the author]

The *bureaux de style* suggested modifications to the fashion product components – and therefore to the fashion products themselves – by altering their color, fabric, trims, shapes, etc. The suggestions followed the two annual seasons, with strict dates for each industrial stage, in an effort to ensure a coordinated sector action. As soon as they emerged, trend books became indispensable tools for the fashion industry. Through the trends presented in the notebooks, the bureaus naturalized "fashion orchestration" by communicating synthesized guidelines from the perspective of a European axis– that is historically central in fashion.

From the efforts of the textile industry to organize the chain under its own dynamics, style committees – which gave way to the *bureaux de style* – come into play. Since the 1950s, centralizing personal figures were transubstantiated into institutionalized figures. Committees, and subsequently the bureaus, created unity and coherence among the various links of the production chain, synchronizing information. The information provided began to be highly valued by fashion companies, and the world has seen the emergence of further agencies dedicated to defining strategies for the fashion market, presenting guidelines for future collections and products.

During the 1960s and 1970s trend consultants were the ones dictating trends. It was only in the 1980s that studies in psychology and sociology started taking place in trend research, altering trend forecasting in and outside fashion (Rodi, op. cit.). Based on studies of human and social sciences, trends have multiplied, and the activity of fashion consultants, or trend researchers, has increasingly involved the identification and selection of common features, confirming and filtering trends. Furthermore, as still-relevant institutions in the international fashion system, *bureaux de style* continue to play a key role in outlining the trend panorama, operating alongside the press (Lerfel, 2012).

Throughout time, the activities of *bureaux de style* have changed focus: consulting (Promostyl), public relations (Relations Textiles), advertising (Mafia) and creative design (Peclers Paris) (Maillet, op. cit.). Enlarging the scope of action, other trend forecasting agencies have emerged, focusing on cultural and sociological consumer trends to be applied to various industrial sectors. Furthermore, the advent of the internet has not only altered the way *bureaux de style* research trends, but also how they inform them. Overall, Paris loses ground to London, which has benefited from the transition of fashion trend forecasting and diffusion to the environment of the internet.⁴⁹

⁴⁹ "Style bureaus fail to develop with clients in growing industrial sectors (luxury, consumer goods, decorative items, tourism, etc.) Progressively Style bureaus are less influent to the fashion and textile industries than they were in the 1960s and 1970s. One bureau is liquidated in 1972 and the remainings sell themselves to actual managers (Carlin, Promostyl) or to advertising agencies (MAFIA, PeclersParis). However the difficulties of Parisian Style bureaus had less to do with external reason, the presumed European decline in fashion, but with internal explanations" (Maillet, op. cit., p.8).

4.3 BUREAUX DE STYLE: FASHION TREND FORECASTING COMPANIES

The number of companies that dedicate time and money to the research of trends for industrial fashion production has increased. These companies, *bureaux de style* or fashion trend forecasting companies, monopolized expertise in trend forecasting, commercializing trends in the forms of trend books with guidelines for fashion products that were released up to 24 months in advance. For a long period of time – with outcomes in the present – the fashion trends reported in trend books corresponded to the filtering performed by renowned experts of the *bureaux de style*.

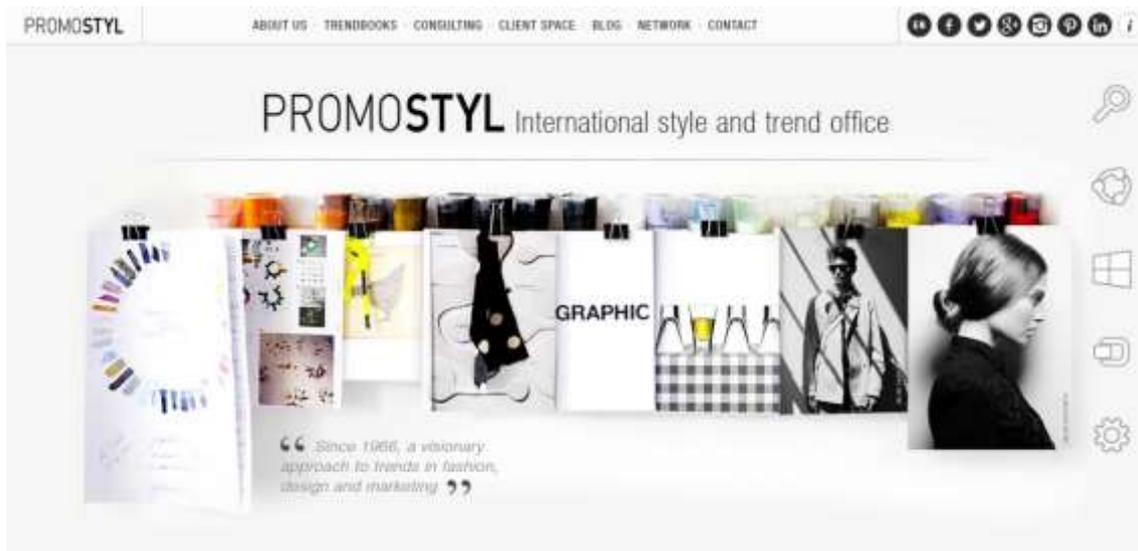
Among others, studies in the field of design focus on understanding “the immaterial side of design’s agency” (Petermann, op. cit., p.2; Tonkinwise, op. cit). The main purpose of this research is to analyze the role of fashion trend forecasting companies – *bureaux de style* – in the current fashion system. To that end, this specific part of the research aims to point out the most relevant *bureaux de style*, in terms of their consecrated expertise and relevance in the international fashion market, and to unravel the modalities and strategies with which they inform fashion trends and themselves as experts.

In order to accomplish these goals, an applied study was conducted in the form of documentary research. The investigation collected data on trend research companies, and the informational mode they apply to communicate fashion trends and establish their expertise. This stage involved the collection of imagery and textual material on the websites of nine trend research companies. *Bureaux de style* were selected considering their reputation and worldly fame and also due to the frequency with which they were mentioned by designers during the interviews⁵⁰. They are: [1] Peclers, [2] Promostyl (Figure 39), [3] Carlin (Figure 40), [4] DMI (as German representative), [5] View, [6] WGSN, [7] Use Fashion (as Brazilian representative), [8] TrendsTop (Figure 41) and [9] TrendUnion (Figure 42).

The nine different *bureaux de style* were analyzed individually in detail and in categorized groups according to typologies of their structure, format and main attributes. Four main types of *bureaux de style* companies composed the sample: [a] traditional *bureaux de style* – of French origin and dating back to *coordinations de style* in the 1960s, which made their name on the tradition and reputation of the French fashion system; [b] pragmatic *bureaux de style* – such as DMI and Textile View, which not only provide direct and concise product directions, but also provide inspiration through street style and culture reports, overviews of *prêt-à-porter* runway shows, and hints from important manufacturers of the branch.

⁵⁰ See chapter 5. Fashion trend usage.

Figure 39 Traditional bureau de style: Promostyl



Source: Promostyl (n.d. II)

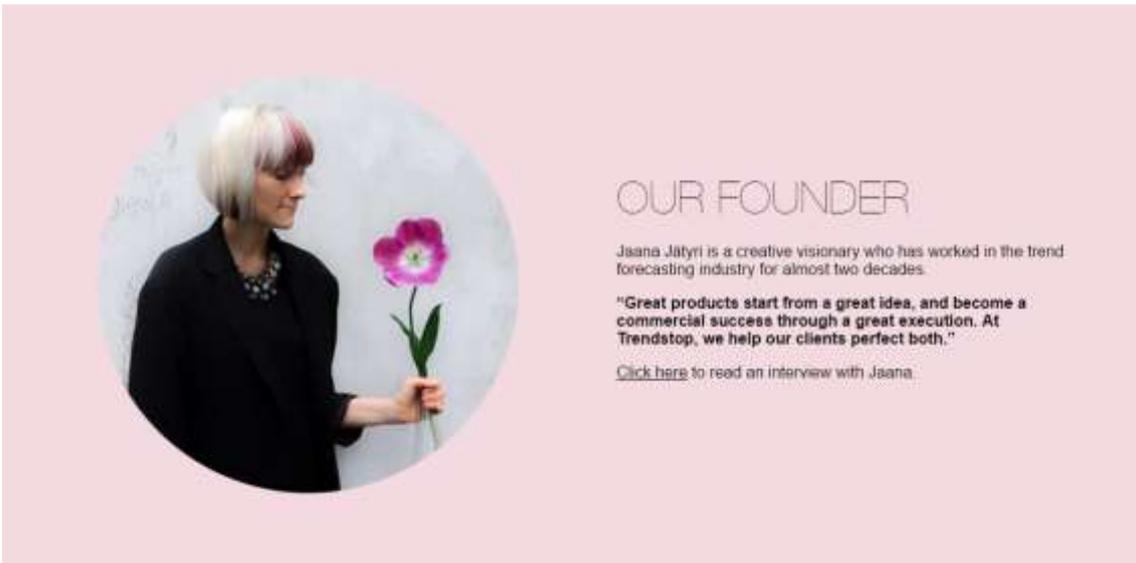
Figure 40 Traditional bureau de style: Carlin



Source: Carlin (n.d.)

The third type of fashion trend forecasting businesses is the recent [c] portal format *bureaux de style*, on which companies rely to achieve global reach and sell themselves due to their international scope and market assertiveness. Finally, the fourth type of forecasting typology in fashion consists of [d] guru-based *bureaux de style*, with Trend Union (Figure 42) and its founder and main figure Li Edelkoort representing their ultimate expression. The agency Trendstop (Figure 41), and its founder Jaana Jättyri, was classified as hybrid, since it fits equally in the categories of portal and guru-based *bureaux de style*.

Figure 41 Guru-based & portal bureau de style: TrendsTop



Source: TrendsTop (n.d.)

Figure 42 Guru-based bureau de style: TrendUnion



Source: TrendUnion (n.d.)

In order to systematize the typology of *bureaux de style*, the following chart was developed (Chart 4), presenting the name of the companies that compose the sample of this research, their flagship product or service and the main branding attribute emphasized in the companies' communication. The systematization does not intend to take account of all companies and company types, but rather to organize the sample of this specific investigation, which focused on world renowned *bureaux de style* that attend to most of the fashion industry in order to comprehend their discourses of legitimation and expertise.

Chart 4 Types of bureaux de style

Type of <i>bureau de style</i>	Name	Main product	Main branding attribute
Traditional	Peclers	Trend books	tradition [French expertise]
	Promostyl	Trend books	tradition [French expertise]
	Carlin	Trend books	tradition [French expertise]
Pragmatic [tech. product direction]	DMI	Trend books and color cards	coordination of the fashion branch and product direction
	View	Magazine	coordination of the fashion branch and product direction
Portal	WGSN	Digital portal	global reach and marketability
	Use Fashion	Digital portal	global reach and marketability
[hybrid]	Trends Top	Digital reports and seminars	global reach and marketability; founder [Jaana Jättyri]
Guru-based	Trend Union	Trend seminars	founder [Li Edelkoort]

4.3.1 Analysis of *bureaux de style*

As previously presented, nine highly-ranked *bureaux de style* comprise the data of this stage of the research: [1] Peclers, [2] Promostyl, [3] Carlin, [4] DMI, [5] View, [6] WGSN, [7] Use Fashion, [8] TrendsTop and [9] TrendUnion. . Material was collected from the freely available content of their official websites, blogs and social network pages. Data analysis was interpretative and critical “in emphasizing not only the importance of subjective meanings for the individual actor, but also the social structures which condition and enable such meanings and are constituted by them” (Walshman, 1993, p.246).

In order to respond more directly to the focus of this research, the analysis approached themes and topics generally related to fashion trends and fashion trend expertise⁵¹. The theoretical research previously presented in this chapter was fundamental to support the documentary analysis of fashion trend information and the discourse of the *bureaux de style* about themselves. At this stage, emphasis was given to the ways in which fashion trends and their experts present themselves within the fashion system, considering that the interaction between design and trends involves the dissemination and reception of messages organized and developed in information processes.

Data was inserted in the software MAXQDA, as well as codes that were defined with the use of content analysis at the open coding stage, as regarded by Grounded Theory (Corbin & Strauss, 2008). Such codes were used to arrange all the collected material. From a total of 23 codes, 12 codes with their respective sub codes were further analyzed in detail in axial and selective coding. The code selection implied numeric representation and theoretical relevance. Therefore, the next pages sequentially address the following selected codes:

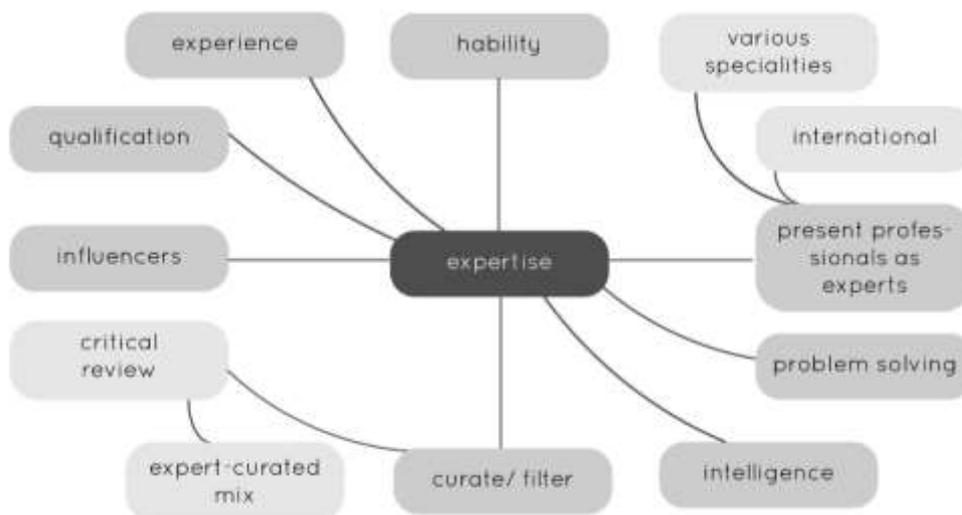
⁵¹ The individual analysis of each bureau was, therefore, considered unnecessary to the scope of this work and can be found in Attachment I.

1. Expertise
2. Professionalism
3. Endorsement
4. Superiority
5. Accuracy
6. Future X Present [XPast]
7. Reinforcement of tradition
8. Communication skills
9. Work load
10. Commercial factors
11. Numeric information
12. Incitement of fear

4.3.1.1 Expertise

The first topic to consider on the subject of *bureaux de style* – the topic that names this chapter – is that of expertise. In the analyzed discourse of the *bureaux de style*, expertise is mostly grounded in assumptions of the ability and qualification of professionals and their proven experience. Professionals are referred to as qualified, resourceful, talented and highly capable of achieving the “impossible”. Their proven experience focuses both on the combined background of researchers, 700 years in the case of WGSN, or on the founder, in the cases of Trend Union and Trendstop. The founders Jaana Jätyni and Li Edelkoort are presented as leaders and influencers.

Figure 43 Summary map of the code expertise



Source: Author

Agencies claim to have “world-class consultants with a proven track-record”, putting their experience to the test. The capabilities most often mentioned refer to [a] intelligence, and [b] problem solving. *Bureaux de style* present their expertise. The required intelligence to solve problems is “based on the permanent know-how” of those companies, formed by the “industry’s best brains” (DMI). Their self-affirmed intelligence

is put into service for fashion companies, enabling “better decision making, improving profitability and driving top-line growth” (WGSN). The team is presented as being multi-faceted and specialist. Combining the capabilities of different employees, they conduct a critical review and curate content.

4.3.1.2 Professionalism

The topic of professionalism addresses similar issues, especially the core competences of fashion trend research. Besides forecasting the future of the fashion system, deciphering trends, analyzing and communicating them, fashion researchers currently conduct design development, direct services of brand and style and contribute to innovation. Along with providing product and brand support, companies are aware of their greatest benefits to customers: adding confidence, giving credibility and creating cohesion within the fashion industry. The solutions they offer provide trend validation and assurance for unsure fashion designers, buyers and directors.

Technique is also a central point concerning professionalism. Due to the digitalization of trend reports, features such as the possibility to download graphics direct to software are proudly announced. In the case of printed materials like the books from Li Edelkoort, aspects such as handcraft and limited production, which could be seen as restrictions, are instead highlighted as attributes.

Remarkable qualities of the *bureaux de style* denote the commitment to their clients and the future, their “error-free” effectiveness. More than that, they need to affirm that client companies do not intend to disregard their services. “Designing without WGSN is like being a surgeon without the best technology and the best medications, why would you?” says Francine Candiotti, Design Director at Fila. All the presented benefits intend to show that fashion companies subscribe their portals and reports, which “enable what used to be impossible” and “bring unparalleled insights”.

Figure 44 Summary map of the code professionalism



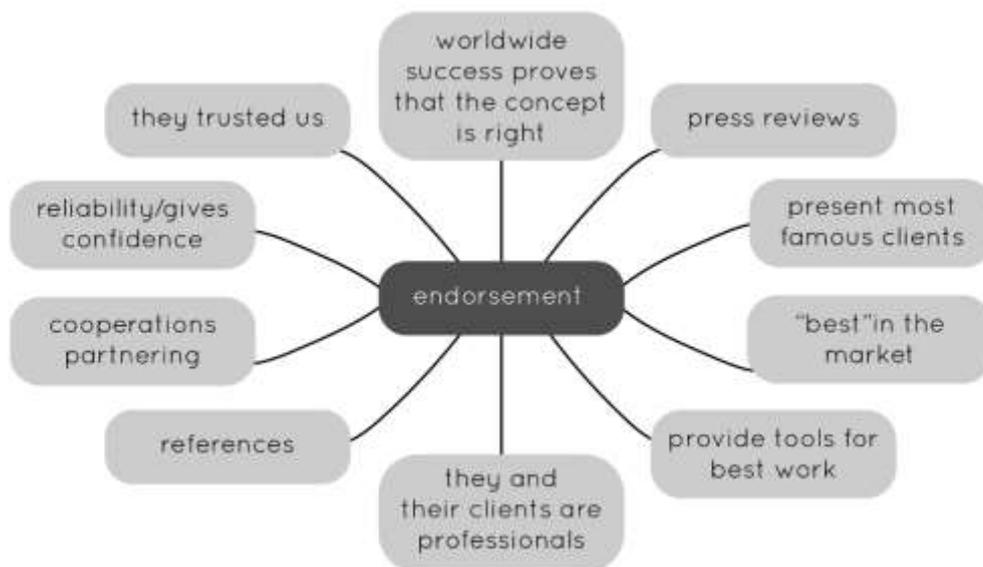
Source: Author

4.3.1.3 Endorsement

Endorsement works as a product of transferring the qualities and success of clients who attest the services of the *bureaux de style*. In this sense, just as they present themselves as professionals – stressing their qualities and the benefits of their services – they present their clients as professionals, presenting a selection of clients as a reference for their quality services. As such, the excellence of the forecasts and consultancy makes them “the professionals’ first choice” (View). Even when not mentioning the exact name of the client companies, *bureaux de style* state that their clients are “the industry’s best” (WGSN) or “the world’s best-known companies” (Trend Union).

In this matter, they affirm that they arm designers with confidence (WGSN), since they provide the tools for designers to do their best work (ibid.). Since the companies’ main goal is profit measured in sales numbers, the *bureau de style* Trendstop even validates forecasts with consumers’ buying preferences in order to ensure that “forecasts are reliable”. Other forms of endorsement also presented as trust strategies by the *bureaux de style* are cooperations and press appearances. The inspirational Trend Union uses the talent of artists and photographers as reinforcement for their talent and the visual and conceptual quality of their products. Similarly, Promostyl affirms that relationships with partners helped to achieve continuous growth “and enabled [them] to keep [their] methodology operational”, in an iterative improvement process since 1966.

Figure 45 Summary map of the code endorsement



Source: Author

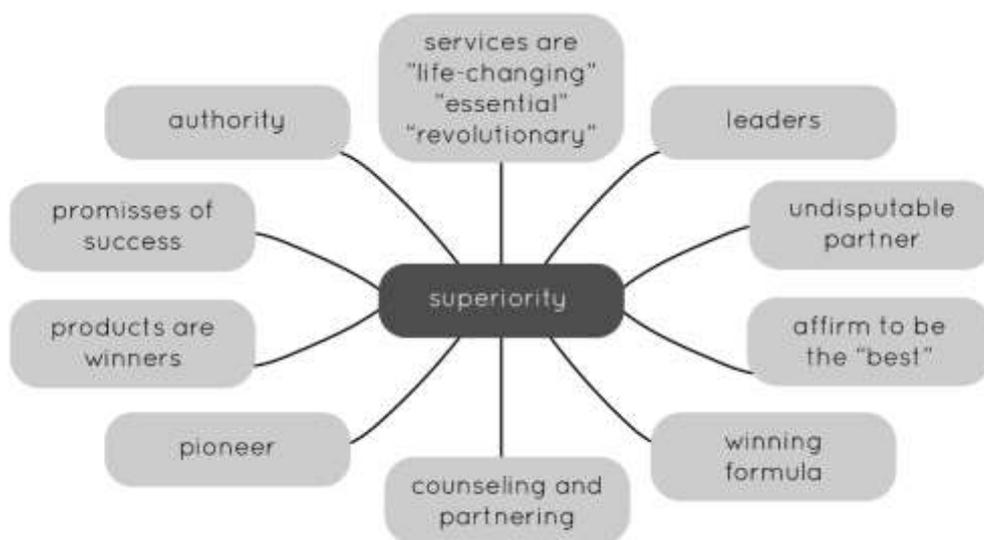
4.3.1.4 Superiority

All *bureaux de style* make use of a superiority discourse to legitimize them as leaders. Peclers claims to be “the leading trend, style and innovation consulting agency” and “the undisputable partner”; Trendstop, the “leading online trend platform”, and View Magazine as having “internationally leading publications and products” and being “the

most esteemed” of the field. Facing each other as competitors, each *bureau de style* affirms that it is the best in trend forecasting. WGSN presents “a winning formula” and Carlin promises to provide customers with “better advice” and “the best vision of the market”. To emphasize their capabilities, they claim to be visionary (Promostyl), pioneer (Promostyl and TrendUnion) and “first of its kind” (TrendUnion).

Superiority is mentioned softly, suggesting *bureaux de style* as being counselors and partners, or forcefully, claiming to be “the global trend authority for fashion and the creative industries” (WGSN). Often superiority relies upon the founder or team of experts, assuming that they have unique expertise to address challenges (Peclers). The superiority discourse is also grounded in intelligence, with various references to the concept as if it were a transferable and marketable good – “WGSN has been providing counsel, insight and intelligence”. *Bureaux de style* affirm their supremacy with direct and promising statements, assuring that they offer “the right direction” (Carlin), ensuring “products are winners” (WGSN).

Figure 46 Summary map of the code superiority



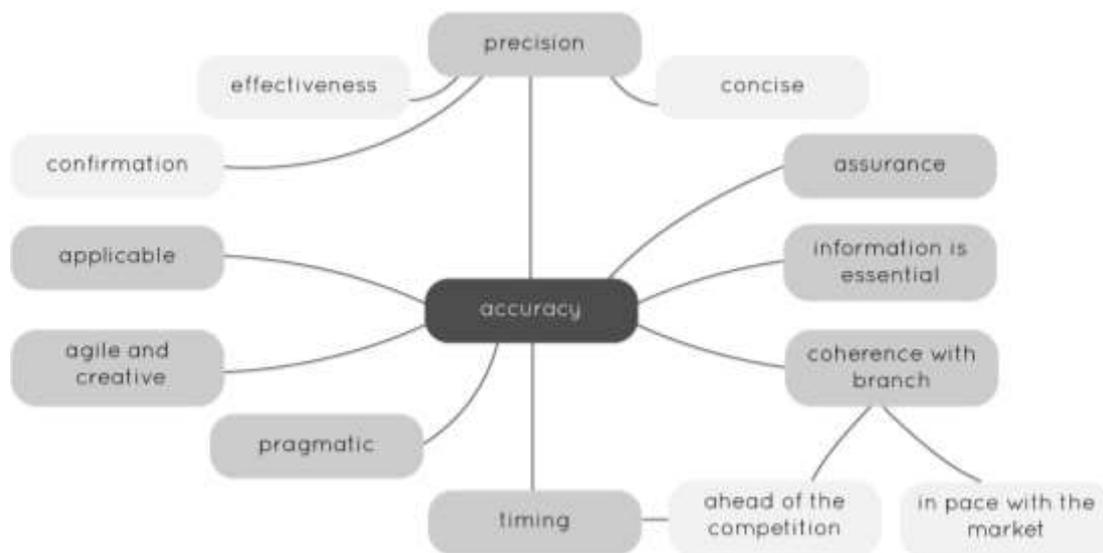
Source: Author

4.3.1.5 Accuracy

The topic of accuracy is rather complex, involving different subcategories. More directly, the accuracy of *bureaux de style* relates to precision. The conveyed information is “clear, concise and confirmed”. This type of information should “ensure products are winners before they go to market”, allowing designers and directors to “choose and act effectively” (Trendstop). Carlin affirms that their services respond precisely and creatively to the customers’ needs, being both agile and creative. The effectiveness of their bets is also said to occur “as predicted”. Accuracy also involves coherence with the market and branch. Coordination of colors and prints is often mentioned by many *bureaux de style*, strengthening their heritage as conductors of the fashion industry.

Affirmed to be effective and pragmatic, *bureaux de style* present themselves as “pragmatic” (TrendUnion) and as “support to develop what needs to be done” (UseFashion). Reports should be used “as concrete evidence” to back up designers’ instincts (WGSN). Therefore, they wish to provide safety and confidence in committing to trends ahead of the competition. This reliable information is stated as needed, presenting information as “essential”. In this sense, not only is the information affirmed to be correct, but also correct timing is crucial. Applicability is also recurrent in the analysis of the *bureaux de style*. They try to minimize the complexity of reports by affirming that they are “as actionable as possible”, and easy to implement.

Figure 47 Summary map of the code accuracy



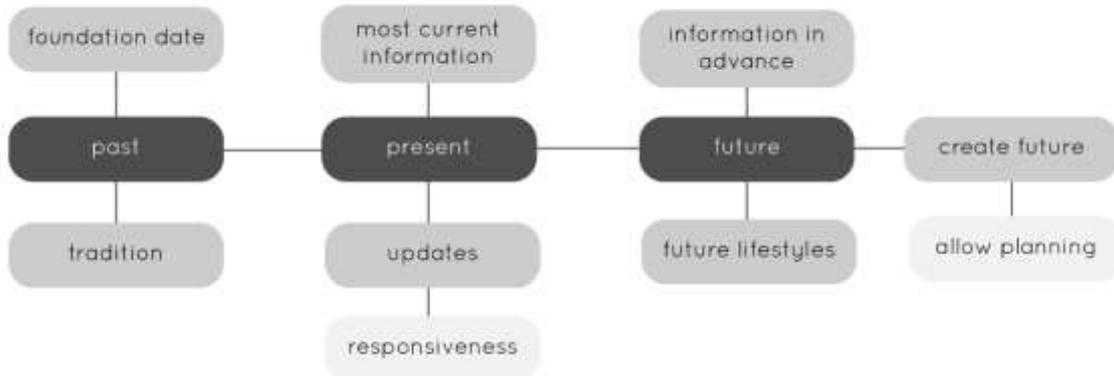
Source: Author

4.3.1.6 Future X Present [X Past]

Dealing with the future, acting in the present and underpinned by the past, *bureaux de style* have a particular relationship with time. This function of offering information in advance allows companies to plan and strategize based on future lifestyles, staying ahead of the competition, “creating the future” (creating tomorrow, says WGSN) that others will live in. The broadcasted reports offer a preview of information that enables fashion design companies to visualize current and future scenarios and consumer issues and use it as base for developing their collections and products

Due to changes in the timing and integration of the fashion production and distribution system (see Chapter 2), trend reports offer updates, investing in the possible responsiveness of fashion design labels. The constant updates have also remodeled the frequency of reports and communication between the *bureaux de style* and the market. In order to present the “current development in the fashion market and marketing”, teams need to be “up-to-date and always on site” (DMI), since “yesterday’s safe bet is today’s old news” (WGSN).

Figure 48 Summary map of the code future, present, past

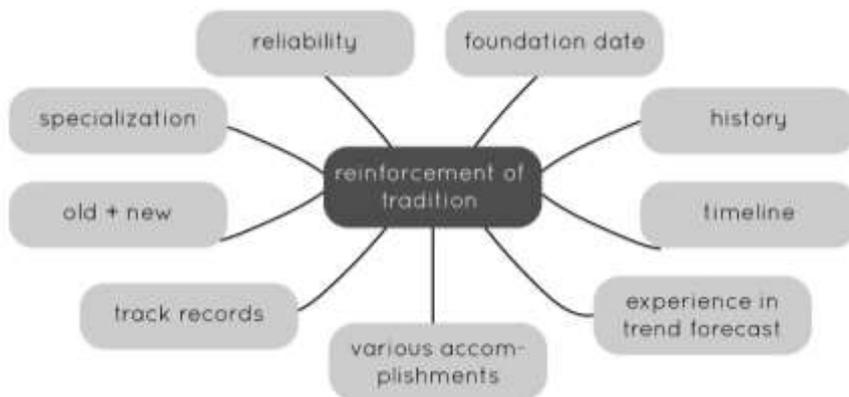


Source: Author

4.3.1.7 Reinforcement of tradition

Old and new seem to be a constant duality of *bureaux de style*. At the same time that they make their living researching what is yet to come, they feel the need to reinforce their tradition. Every *bureau de style* presents their foundation date; the more traditional, such as Peclers, Promostyl and Carlin, as well as the more novel, like WGSN, Use Fashion and Trendstop. Tradition seems so important that *bureaux de style* present their history even before acting in the field – like the German DMI, which dates back to 1927 but was re-established in the 1950s. Along with their foundation, they like to present the various accomplishments in their histories. Often the historical timeline focuses on a specific sector – such as textile or leather goods – or on the founder, in the way that TrendUnion presents a record of Li Edelkoort’s work achievements.

Figure 49 Summary map of the code reinforcement of tradition



Source: Author

In this space, *bureaux de style* focus on presenting “paradigm-shifts”. Use Fashion brags about being the biggest *bureau de style* from Brazil and the first company to identify that fashion was a business. Trend Union magazines are shown as having “helped [to] redefine the publishing medium, acting as inspirational style bibles”. Overall

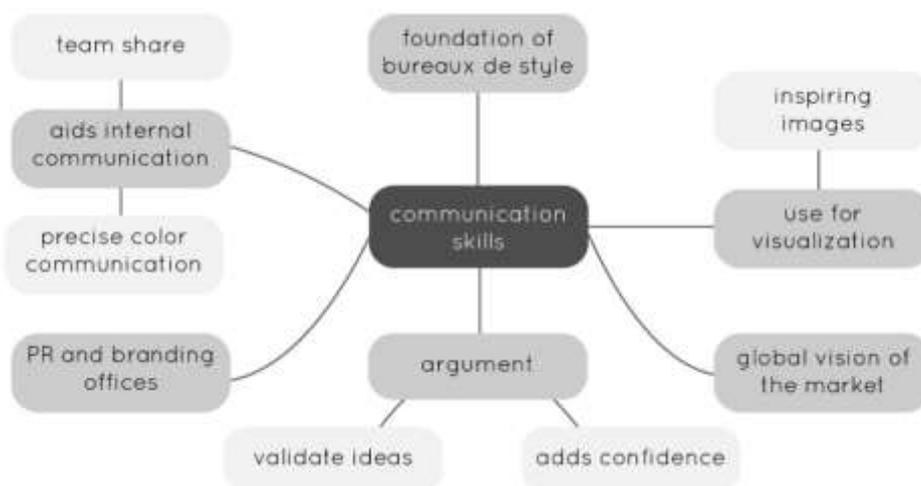
these ‘track records’ intend to attest to their experience in trend forecasting, generating trust and reliability. The years of specialization and advising of the company or founder are constantly stressed: Peclers “has been advising the most prestigious brands in the world for more than 40 years”; Promostyl claims to be the business’ pioneer, founded in 1966; “WGSN has been providing counsel, insight and intelligence [...] since 1997”; etc.

4.3.1.8 Communication skills

Communication rests on the foundation of the *bureaux de style*. The use of reports for visualization addresses both visual information and a global vision of the market. Reports and trend books “offer a panoramic view [of the market] 18-24 months ahead” (Carlin), allowing companies to expand their horizons and comprehend the trends of the branch (UseFashion). Communication is also a central point when generating internal coherence within client companies.⁵² *Bureaux de style* have specialized to attend to this demand by offering a “workspace and sharing tools to collaborate and communicate with colleagues” (WGSN) and presenting references that are “easy to use” (Carlin), simplifying information exchange within the team (Use Fashion).

However, the most referenced communication feature of trend books and reports is their use as argument, giving confidence for designers and helping decision-making. Since *bureaux de style* assure that they will validate the information conveyed in reports, designers feel safe in using them as support in defending their work and choices – as aforesaid. In addition, reports can be used by designers to validate their own ideas before presenting them to the team and directors, since the *bureaux de style* offer “effective support for individual decisions through comprehensive information” (DMI).

Figure 50 Summary map of the code communication skills



Source: Author

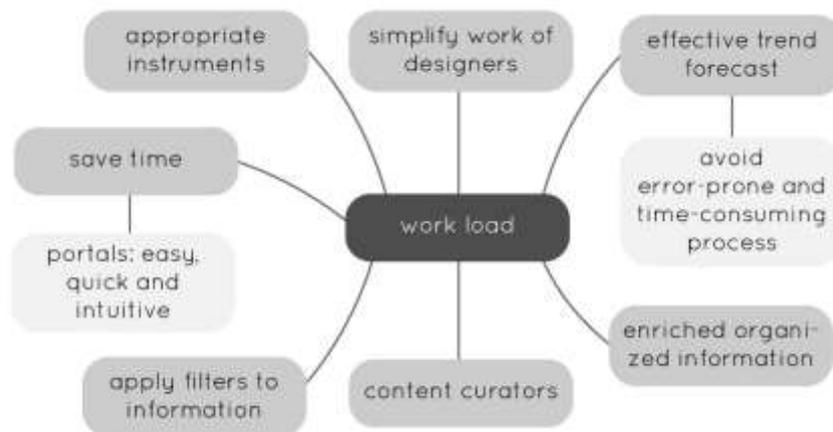
⁵² This topic will be addressed further in detail in the analysis of the interviews conducted with fashion designers and product directors, in the following chapter.

4.3.1.9 Work load

Trend reports are presented to simplify the work of designers. Pragmatic examples and correspondence references for trend application are positive features. The material developed by the *bureaux de style* allow the “translation of trends into commercially successful products”, being actionable style recommendations. Information is presented with “appropriate instruments for implementation” (Carlin), serving as an actionable and effective tool for creative, operational and strategic direction.

Trend forecasters work as content curators, filtering the massive data available around the globe and decoding them into concise trends. *Bureaux de style* intend to offer “plenty of choice [...] without leaving you overwhelmed” (Trendstop). Complying with the essential (Carlin) by presenting an expertly curated mix. The use of trend portals and forecasts is related to time saving – “over 9 in 10 say WGSN has given them back a half day time per week” (WGSN). For being practical, the reports are seen as increasing productivity and improving the research processes, saving both time and effort. The purchase of trend information would help designers to avoid “a messy, error-prone, time-consuming and costly process” (WGSN) of conducting trends research by themselves.

Figure 51 Summary map of the code work load



Source: Author

4.3.1.10 Commercial factors

Money-saving is also a noted advantage. Trends are seen as investments with a direct return. Saving time and money, trend information allows companies to develop solutions and meet the businesses’ objectives, maximizing margins, reducing risk and improving sales. Profit, lucrativeness and increased income are major arguments. Trends well applied in products are an “opportunity to increase the [product’s] price [...] without losing market share” (WGSN). Related financial arguments are displayed as survey percentages; for example: “84% report that WGSN has helped them save money” and “93% of executives report that WGSN has improved their sales” (WGSN).

Sales increase due to the acceptance of the product in the market; once trends have deciphered future customers’ desires. To this effect, trend reports induce the

development of “the most desirable and successful products” (Peclers), creating value with the right product (UseFashion) and "ensuring your ranges [...] are on trend and relevant to your target audience" (Trendstop). This means that in order for businesses to thrive, they need to be aware of market potential and the commercial reality. Trendstop promises to “intensify your target, increase sales, reach goals, get results effortlessly”. Therefore, consumer predictive insight is transformed and applied strategically to help companies to plan ahead on what "can be a multi-million pound decision" (WGSN).

Figure 52 Summary map of the code commercial factors



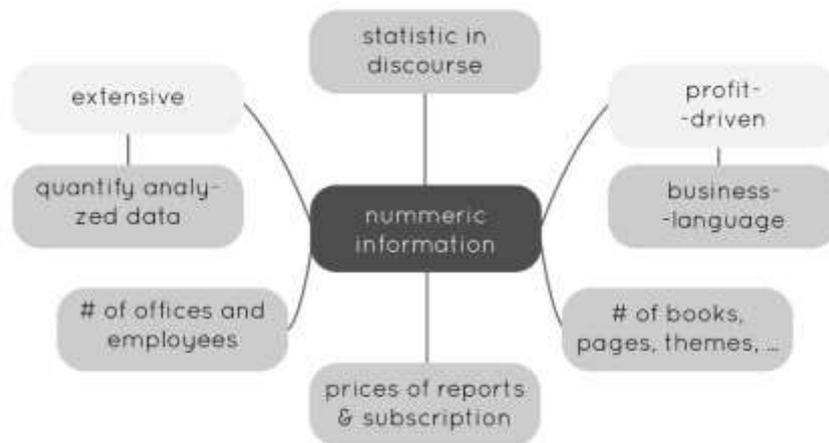
Source: Author

4.3.1.11 Numeric information

As one could notice previously, many *bureaux de style* have invested in numbers and statistics in their discourse, as a strategy for convincing not designers, who rely on trend forecasts for inspiration and confirmation, but business directors, who are much more profit-driven. Numbers are also used to quantify the analyzed data, providing the feeling that the research conducted by the *bureaux de style* is extensive and substantial – “more than 83m retail SKUs monitored”; “2m consumer panelists”; “12 thousand brands, 400 product categories”, etc. (WGSN). Data on their offices and teams is employed in a similar way: WGSN has 350 experts, resulting in 700 years of combined specialization, Carlin counts on 50 collaborators and Trendstop has an "approachable team" of 180 “seasoned industry experts”.

The information is also presented with numeric references: the number of available trend books, content pages, product categories, themes, colors, looks, flats, graphics and images. However, the most important numeric information for business owners and directors is the cost of trend reports. Trendstop’s subscription varies from €595 to €2,575 quarterly. Carlin trend books can be purchased from €980 and Peclers’ from €1,550. The color charts from DMI cost €138 each, and reports €420 for non-members, while members pay half price. The costs of WGSN are not available on the website but are known to be from €10,000 to €20,000 per year. UseFashion offers a complete subscription for slightly less than R\$7,000 per year – approximately €2,000, “a value that attends to the reality of the Brazilian market” (UseFashion).

Figure 53 Summary map of the code numeric information



Source: Author

4.3.1.12 Incitement of fear

In order to ensure their price is worth paying, *bureaux de style* invest in a notable strategy of inciting fear of the future and unknown fashion market. *Bureaux de style* affirm that the field is complex and challenging. The future is difficult to decipher, decrypt, anticipate and articulate due to transforming and demanding environments (Peclers; Carlin). In an effort to be ahead of the competition, “it is no longer enough to track innovation, it needs to be anticipated” (UseFashion). Along with the context, competitors and consumers are presented as challenging for fashion companies. Since “every choice matters”, they need to be backed up by knowledge and information that “forms an early and necessary basis” for the work of designers.

Figure 54 Summary map of the code incitement of fear



Source: Author

Inciting fear, the researched *bureaux de style* intend to stress the need for trend information, both by insisting that talented designers would rather not do without their services (DMI, WGSN) and by displaying missed opportunities (Trendstop). The

enormous amount of data freely available is referred to as a cause of overload. As a solution, reports would be a simplifying solution, delivering the right content at the right time (Carlin). The discourse of the *bureaux de style* intends to prove that reports provide security by offering directions, allowing safer decision-making and supporting strategic planning.

4.3.2 Modalities of fashion trend information

As previously stated, the informative processes of fashion trends are central to this dissertation, since the *bureaux de style* and portals absorb, filter, edit and direct information, and information is their main product. Therefore, it is important to present the different ways in which fashion trends are reported because they also comprise discourses about the agencies and about expertise on trends. To reiterate, this work intends precisely to investigate the process of information, application and perception of fashion trends by *bureaux de style* and fashion companies, respectively.

Also, this topic intends to fill the lack of data on the mode with which fashion trend information is presented, mostly reverting to Treptow’s (2013) general formula “influences + colors + materials + shapes = themes = fashion trends”. A documentary study on fashion trend information was conducted with data from the portals of two trend forecasting companies, along with available free content from other *bureaux de style*. In this case, data analysis involved comparative procedures with the intention to identify similarities in the ways *bureaux de style* convey information of fashion trends (Morlino & Sartori op. cit.; Sartori, op. cit.; Durkheim, op. cit.). A summary of the results was systematized in Chart 5. The chart comprises the different media, types of content and expressive resources of fashion trends that will be further presented, albeit succinctly.

Chart 5 Modalities of fashion trend information

Media	Types of content	Expressive resources
Trend books [I]	Inspirational / macro trend	Images and photographs [a]
Portals [II]	Product directions: colors; materials; shapes, fit and structure; patterns; finishing and details	Mood boards [b]
Trend reports [III]		Texts [c]
Trend videos [IV]		Keywords [d]
Trend presentations [V]		Examples and references [e]
Installations [VI]		

Fashion trend information is usually conveyed under certain categories. The main category corresponds to the addressed future season. Two other categories that change the scope of trend information are the consumer segment and product type. Most companies attend to groups of men, women, children and teenagers – with some attending to newborns or exclusively teens. The scope of product type is more extensive, because it can concern specific materials - jeans, circular and linear knit and flat weaving -; specific product use occasions – lingerie, party dresses, beachwear, surf and skate wear,

sportswear and fitness -; and even attend to fashion complement fields – jewelry, accessories, shoes and bags and trims and haberdashery.

Traditionally the information exchange between *bureaux de style* and client occurred by the subscription or purchase of [I] **trend books**. They consist of printed books and binder folders that illustrate trends for future fashion seasons (Figures 55 and 56). The information is usually organized according to specific themes, and from these themes the directions for product application are derived, which will be detailed later on in this topic. Trend books usually have similar content and structure, and they are edited based on the traditional fashion seasons. The idea of trend books as static and closed composition has been replaced by the idea of the trend book as a "visual encyclopedia" and as an open work (Colombi, 2011), mostly due to alterations propelled by the digital fashion trend portal.

Figure 55 Trend book from Peclers



Source: Peclers (n.d.)

Figure 56 Trend book from DMI



Source: DMI (n.d.)

[II] **Portals** represent the most successful transition from printed to digital media, presenting greater growth in comparison to the print *bureaux de style* (Maillet, op. cit.). Online portals of restricted access invest in the possibilities offered by new media. The subscription allows professionals to access daily updated content on trends, inspiration and market and product direction. They comprise textual and photographic reports, news and articles and a library of images, colors charts, prints and technical drawings - which greatly expands the amount of information conveyed by the *bureaux de style*. The digital media is rich and multifaceted, involving different senses, potencializing communication, and also allowing the insertion of different media contents, such as trend videos and videos made from presentations, in addition to the regular trend reports (Figure 57).

Figure 57 Trend portal: UseFashion



Source: Use Fashion (n.d.)

[III] **Reports** usually consist of means of updating information on fashion trends. They are configured as a blog post or magazine news. They usually aim to communicate a concise overview of catwalk shows, street style and textile and fashion fair analysis, grouping the content into predefined categories that are usually sorted by themes and colors. Some reports also focus on personal style, presenting influencers such as celebrities and artists with relevant clothing and lifestyles. Another manner of presenting an overall style direction is the merchandising of brands that are currently becoming successful and whose style should be seen as a reference by other companies of the branch.

[IV] **Trend videos** and [V] **presentations** also have similar expressions to trend books, with the same goal of presenting trends, their implications and possible applications. The main difference of both media from trend books is the possibility of investing in both sound and time. Trend presentations often display trend videos and films, accompanying the trend of fashion digital films (Needham, 2013). The new informative and promotional modality invests in new relations and imbrications between the haptic and visual aspects (Campos, Gonçalves & Gomez, 2014). Meanwhile, [VI]

installations reach another sensory level, because they allow for an experience of touch, and for participation in the theme-driven built scenario. Installations usually occur in fairs, such as the traditional installations of Li Edelkoort in Première Vision Paris, and the more recent ones of WGSN in Heimtextil in Frankfurt (Figure 58).

Figure 58 Installation WGSN in Heimtextil



Source: WGSN (2016)

Of greater interest to this work are the types of content. In all supports and media fashion trends usually address *macro* and *micro trends*, i.e. present both a more inspirational direction and atmosphere and the practical application of different consumer trends into products and services. **Inspirational content** usually consists of one or more bigger themes divided into three more directed topics. All themes and topics receive a specific name, usually appealing and inspirational, for example infusion, substantial design, earthly life, etc. (Palhão, 2016). Besides the name of the trend, an introductory text from five to 10 sentences sets the context scenario, the sensation and the *mood* of the trend. The text may provide information about the trend's drivers, as well as data from socioeconomic research.

This type of content, just like all other content in fashion trend forecasting, presents a compilation of inspiring images that communicate with the trend. Most of these images are photographs that feature themes not directly related to fashion. In this sense, the inspirational content implies the creativity and flexibility of designers in choosing their own manner of adapting the inspirational input to the resultant fashion product. In order to set a broader scenario for design, the *bureaux de style* present artistic expressions of trends. The general idea of a fashion trend is reinforced by written sentences and keywords. Nonetheless, texts are not explanatory.

Product direction content invests in much more direct speech and more visual information than the fashion field itself. The references may be photographs from

selected products or runway shows, artistic drawings of a complete look or even ready technical drawings. Product direction, in accordance with what Treptow (op. cit.) affirms, does present influences, colors, materials and shapes. However, a more detailed analysis inserts patterns and finishing and details. All product-driven trends are presented within a conceptual context, therefore they also invest in an introductory text that sets the inspirational course. Product trends may even present key clothing items. The expressions are similar to other trend presentations, with the possible insertion of material samples in the case of printed trend books.

As already mentioned throughout the text, there are various expressive resources applied in the information of fashion trends. [a] **Images and photographs** are central for all communication processes in fashion (Figure 59). They can be presented independently but are usually combined with others, either in moodboards and image panels or in editorial compositions of books, reports, websites, etc. Kronka (op. cit.) states that in fashion information, aesthetics come first, with the extensive use of well-taken photographs and many blank spaces, where the assumption that *a picture is worth a thousand words* prevails. Images express different content from the field of fashion and from various fields, such as biology, art, engineering, marketing, etc.

Figure 59 Sample page from View Magazine with fabric presentation



Source: View (n.d.)

[b] **Mood boards** consist of visual compositions characteristic of the fashion branch. Their visual arrangement corresponds to the technique of photomontage or *collage*, by combining in a new composition features of different images with shades, textures, colors, and shapes. Because they are composed of a multitude of visual elements and present images in an integrated manner, mood boards are characteristically inspiring and enchanting. The information is conveyed on a much more aesthetic level, in order to suggest the application of visual information directly into products through visual reference or the general sensory mood, without reducing the trend to a conceptual level (Schmiegelow, Campos & Gomez, 2013).

[c] **Texts** are present but kept to a minimum, used mainly to provide a more direct and evident cohesion among the trend, references, images and examples. Textual speech is characterized by its briefness and highly expressive rhetoric, reinforcing the diffuse visual information by using many adjectives in poetic language. Texts are also used to show how a new trend developed from the previous season's trend, recalling a more rational approach to the presentation of fashion trends. The use of [d] **keywords** for summarizing and qualifying (since they are mostly adjectives) the edited trends is extensive and applied by all *bureaux de style*.

Trend [e] **examples and references** are ways to provide reasoning and application horizons for a trend. By providing references of a trend by means of art expositions, books, musics, video clips, economic surveys, newspaper articles, etc., *bureaux de style* indicate a path that allows clients to deepen their understanding of the phenomenon. At the same time, they intend to assure the assertiveness of the trend, providing the clues that lead to the trend, and putting it to the test. These types of trend expression are rather new and derive from other trend forecasting fields; mostly consumer behavior trend forecasting agencies. As cited, Colombi (op. cit.) states that the current structure of trend books integrates all sources and references, making the research process rather explicit. However the idea that fashion trend books are currently structured more like a "collection" rather than "edited" by the *bureaux de style* (ibid.) seems false, since the *bureaux de style* do not reveal their research stages and processes, and choose not to display all the possible counter-examples to a trend.

4.3.3 Considerations on *bureaux de style*

By analyzing the structure, form and content of macro trends in trend books and portals, it was possible to identify that the overall information of fashion trends is not very elucidative or explanatory. Texts and images consist more of inspiration, enchantment and contemplation strategies than efficient tools in the process of fashion trend information. At the same time, when presetting *micro trends* or product directions, the *bureaux de style* are very direct in the form instructions. Although easy to apply since it is much more codified, such presentation does not help in the comprehension of how specific trends are transformed into product features. Communication strategies seem to address both extremes – highly inspirational and highly applicable - compromising the

comprehension of trends on a conceptual level. Reports on consumer behavior and lifestyle could fill this information gap. However, they maintain the information modes used to inform of fashion trends.

Bureaux de style maintain informative aspects similar to those used by fashion magazines: the use of categorical imperatives and the presentation of trends without convincing explanations, reducing the importance of a supposed “truth” (Erner, 2012) or its sources. Of course, information availability and transparency have altered the degree of influence of fashion forecasts and pushed changes in the presentation of trend drivers and examples. But it is still remarkable that when the data that drives the discovery of a new trend is presented as rationale, it consists of only the examples that reinforce a specific aspect of the trend conveyed by the *bureaux de style*.

Erner (op. cit.) considers that all professionals of fashion creation⁵³ apply a similar strategy regarding fashion trends, considering their ability to influence the choice of a trend and the propensity of a trend to be established, depending on their degree of influence. That is, independent or *prêt-à-porter* fashion designers are known for creating their own trends – even influencing *bureaux de style* – whereas commercial designers need to adapt fashion trends conveyed by the *bureaux de style* into their collections for bigger market-driven fashion design companies.

Attending to the biggest slice of the market – mass market fashion companies – *bureaux de style* intensify their institutional and trend information communication in order to reinforce their consecrated expertise and heritage in the unveiling of future trends. Along with what Beck (op. cit.) postulates on *risk society*, these companies invest in the incitement of fear of competition and the uncertainties of the market in the future with the intention of highlighting a need for their services and claimed “intelligence”. To this end, they not only paint scenarios of doubt and distrust, but also present multiple examples of missed opportunities to increase sales.

As an argument for designers and companies to choose not to conduct their own fashion trend forecasts, the different *bureaux de style* emphasize the difficulties of the process: “messy, error-prone, time-consuming and costly”, according to WGSN. The extensive amount of available data to analyze is also intimidating. However, their expert teams are presented as highly capable of accomplishing such tasks. They are able to do the “impossible”, combining the capabilities and availability of the different employees offering critical curated content.

Since in fashion companies trend forecasting is an activity conducted mainly by designers, *bureaux de style* have them as their main clients, presenting various reasons to stress their reliability, which gives confidence and credibility to their designs – presented as safe bets with the guidance of forecasts. Introducing themselves as counselors and partners, and at the same time as global trend authorities, *bureaux de*

⁵³ The author (Erner, op. cit.) refers to agencies and *bureaux de style* more as offices where trends are created as places where data on future trend is collected, analyzed and interpreted.

style attract insecure designers by offering to ease the work load, providing “actionable style recommendations” so that “designers can focus on creating” and validate their ideas before presenting them for the team and directors.

Therefore, this type of information is seen as essential for the works of designers. Since designers rely on the reports to check if what they designed is “correct”, the information is affirmed as right and true, and as Foucault (2012, p.13) remembers, “the separation between true and false is not arbitrary”: it relies on the expertise and the claimed legitimacy of the *bureaux de style*.

In the case of the *bureaux de style* - just as in the time of sophists - the discourse that prophesies the future not only announces what was going to occur, but contributes to its occurrence (ibid., p.14); agreeing with the thesis of a *self-fulfilling prophecy* (Merton, op. cit.; Erner, op. cit.). This also refers to the idea of a *formulaic truth* (Giddens, op. cit.), in which the announcement is less important than the ritualistic and performative language, and the events caused by the supposed truth (ibid.), assured by the power of tradition. That is, the status of trend forecasting agencies is more important than their competency; although by *pragmatic element of faith*, the truth can be put to test and is considered reliable due to previous experiences.

Much of the adherence to the *bureaux de style* is justified by technical knowledge, the investment in patented methodologies and tools, and the reference to various theories, implying the possibility of observing, measuring, classifying, verifying and utilizing trends. Investment is in the value and credibility of the scientific knowledge, and not in the specialists as people, as stated by Giddens (op. cit.), since expert systems are impersonal. On the other hand, in our society – as opposed to traditional societies – specific knowledge can be learned, and the availability of information means that the knowledge of *bureaux de style* is not fully codified, and lay people may have a more calculated degree of trust in experts.

According to Miguel’s (op. cit.) category of meta expert systems as intermediate institutions that test the capabilities and excellence of experts, regarding information on fashion trends, agencies invest in controlling the information conveyed by this review system – for example by offering their own press and trend content for the fashion specialized and enthusiastic media. Also, the *bureaux de style* choose to offer a selected amount of positive testimonials and successful case studies. In the most remarkable of them, a design director affirms that she would rather not work without the assistance of WGSN, comparing the provided information with the best available technology and tools.

As affirmed in the analysis of the websites, the accuracy promised by *bureaux de style* relates to the traditional coherence with the fashion market and branch. By pledging that they have “the best vision of the market” they also strengthen their heritage as coordinators and conductors of the fashion industry. Selling – or creating – the future but grounded on a strong past, old and new seem to be a constant duality of *bureaux de style*. Although dealing with anticipation, all agencies seem to reinforce their albeit short tradition, their experience, their history, their past, as evidence of their capabilities.

The expertise and the strength of experts – always mentioned, presenting the research team and its competencies – seem to remain the main criteria for the establishment of trust in the *bureaux de style*, which remain the central experts on fashion trends. Even against countercultural phenomena, the apogee of street style and the emergence of blogs, these agencies remain sovereign in the post of taste judgment; although their decisions more directly affect the industrial organization of fashion than the product consumers. Even though the information provided by the agencies is today more a collection of proposals than a precise direction, *bureaux de style's* experts persist as the filters that edit this set of information. The valorization of the selection work is noticeable in the high prices charged by the agencies.

The consecrated expertise means that, even in the face of a supposed democratization of information, these agencies build borders; walls that, even sometimes exceeded, impede the free communication and the collective production of shared knowledge that is characteristic of the current phase of communication in cyberspace. Even against a wide range of information freely available on the internet, these agencies retain a significant number of customers who bear the high cost of the "privileged" information curated by them. However, as previously mentioned, with new spatio-temporal relations, the logic of the research, communication and dissemination of fashion trends has been remodeled.

Based on the conducted research, there is an effort on the part of *bureaux de style* to reinforce a dependency on fashion trend information. Perhaps the renowned agencies offer their clients the same safety and legitimacy that Marie Antoinette offered the aristocratic ladies of Versailles, or that Worth provided noble women at the start of the twentieth century. The exact value that Marie Antoinette aggregated to the brocades of French factories is as difficult to quantify today as it was at the time. Similarly, the exact amount that *bureaux de style* add to the products of their customers is incalculable and will remain so⁵⁴.

The legitimating belief of centralizing fashion figures may also be identified as a continuance in a world that does not cease to be transformed. If historically fashion constructed and disseminated itself due to the new, it consolidated and became sovereign due to tradition. Tradition that is invented and reinvented (Hobsbawn & Ranger, 2008), but nevertheless remains tradition. One may consider that WGSN, for instance, was established no more than 19 years ago, and today may be considered as the greatest *bureaux de style*. More than simply identifying and presenting trends, it is identified and presents itself as a traditional brand in such expertise. It assumes a role

⁵⁴ The commercialization of information, and the difficulty of quantifying the value of information and knowledge applied to products and services is put into question. It is therefore relevant to point out the obstacles faced by fashion companies in identifying a precise measure to evaluate the economic value of trend information, as industrial production incorporates a wide range of specific knowledge applied over extensive and segmented production. Furthermore, the offer of seasonal products makes comparative measurements even less efficient.

which for centuries has been occupied by queens, *créateurs*, fashion publishers, style committees. What never changes is the imperative to change. The dynamics of fashion reveal its most intriguing features: it is perennial; perhaps fashion itself is tradition.

This chapter intended to investigate fashion trend forecasting companies, *bureaux de style*, – here treated as expert systems (Giddens, op. cit) – as influencers of the fashion system. It revealed that these *bureaux de style* invest in particular branding – and the legitimation of power - strategies to inform fashion trends and themselves as experts, creating and reinforcing their skilled conditions and creating mechanisms that incite fear, promise security and create dependency. The following chapter will address the matter of fashion trend adoption and the *agency* (ibid.) of fashion companies regarding general fashion trends, as well as the information of fashion trends edited and proposed by the here analyzed *bureaux de style*.

5. FASHION TREND USAGE

The previous chapter demonstrated the research conducted at *bureaux de style* and their strategies to create dependency on fashion trend information. So far, this work has glimpsed at a perspective on the structural composition of the fashion system, mainly in relation to fashion trends, which comprise the central object of the present doctoral study. Specifically, an effort was made to evidence how the renowned *bureaux de style* strive in showing their assertiveness, superiority, and legitimacy in the fashion branch by creating their own traditions and by occupying the perennial position of judgment of style and taste—in this case, institutionalized in the form of fashion trends.

This chapter, in turn, aims at investigating how fashion companies react and perceive these expert systems and their products and services. Besides aiming to identify the effectiveness of strategies of the *bureaux de style* in maintaining themselves sovereigns, contrasting the potential reality of the use of fashion trend reports edited by the renowned *bureaux de style*—domain of the real—and the effective use—domain of the actual—of this material by designers of fashion companies was indispensable. (Bhaskar, *ibid.*).

The present research can be characterized as qualitative and interdisciplinary, since it recognizes that in order to analyze the problem of the fashion trends usage, it is necessary to conduct different approaches to data collection and analysis, not only during empirical research—which this chapter will emphasize—but also for the documentary research previously reported. Rather than offering a universal solution, the qualitative distinction of this research has as main result to bring a contextualized contribution to the theoretical and practical approaches of the relationship between fashion companies and fashion trend forecasting companies, here referenced as *bureaux de style*.

Critical Realism is one of the approaches that give foundation to this research. It considers that reality cannot be reduced to our knowledge about it, which is always contingent, changeable, and partial. An understanding of reality consists of the following: concrete events, abstract structures, and social practices. This approach differs from a naive realism by critically distinguishing different domains within reality. Bhaskar (*ibid.*) proposes the stratified ontology of reality: a *domain of real*; a *domain of actual*; and a *domain of empirical*.

The *domain of actual* comprises the existent, as an internal structure and its causal powers. That is, the ability to behave in particular manners, tendencies and susceptibilities to certain changes (Resende, 2009). However, if the domain of actual—translated into Portuguese, enlighteningly, as *domain of potential*—refers to structures, the *domain of the real* refers to the activation of power. Finally, the *domain of empirical* would consist of what we actually observe from the structures, potentialities and achievements.

This approach seems propitious as a base for this study, mainly considering the domains of *the real* and *the actual*, once they elucidate that not everything possible to occur depending on the predetermined structures actually happens. Reality opens space

for contingences and liberties of action, whereas *may do* is not a synonym for *does* (ibid.). This theory has references in another foundation of this investigation, which consists of Giddens' perspective for *structure* and *agency*. The Theory of Structuration allows a reflection by the knowledge of a given structure and the consequences of the agents' actions, being valid to institutional analysis in both general and specific terms.

Giddens (2009) opposes the idea that the structure would generate a strength that precludes the action of human agency. At the same time that social agents have the skills to coordinate the contexts of their behavior, these acquired skills are not fortuitous or arbitrary. At the same time that there is no unalterable and integral structure, social agents do not enjoy full autonomy (ibid.). This implies that processes are considered to be structured, i.e. preexisting, are understood as both the condition and the outcome of social actions. They precede it but can be transformed by practices.

The concept of position assists in this understanding, especially when considering the specific field of this work—which involves the profession of fashion designers—where a position must exist prior to its occupation. According to Sayer (2000) and Resende (op. cit.), the set of internal relations of the position influences the actors in a conditional manner. At the same time, by its transformed practices, *agency* is perceptible. Considering the fashion system—which like any system is open to social change and pressure for the maintenance of continuity—the structure of purchase and usage of fashion trend reports traditionally established varies among designers due to their own agencies.

Due to the theoretical and methodological procedures previously exposed, this chapter aims at investigating the frictions between the *real* and the *actual*; between *structure* and *agency*; thus taking into account the practice of creating fashion products and dealing with fashion trends reports of the renowned *bureaux de style*, densely analyzed in the previous chapter. They culminated in the development of a model that indicates the different levels of fashion trend reports usage by fashion companies. The model was generated, evidently, based on all the chapters that subsidized this dissertation thus far, but mainly based on the empirical research covered in this chapter.

It is relevant to state that reality cannot be directly accessed or observed. In the case of this specific work, the observed reality was mediated by the knowledge and the theories presented thus far. Therefore, neither the analyses nor the data collected through interviews can be considered material data objectively collected, since Critical Realism considers it impossible for scientific research to directly access the empirical stratum of reality without going through the researcher's screening. However, this should not be enough to jeopardize the validity of the methods used for data collection and the conducted analysis and interpretation; it is only important to state the impossibility of analytical neutrality.

The first methodological step of the research concerning fashion companies and their agency in relation to fashion trend reports consisted of data collection. For Resende (op. cit, p.62), the strategies for data generation and collection applied in a research

should not be justified in themselves, but rather selected “in relation to the ontological components of the social world that one intends to access, to the version of epistemology and to the research questions”. The present research invested in the articulation of several methods of data collection from different sources, not only for the sake of reliability, but mainly with the goal of approaching research questions in different manners.

Thus, in order to identify parity with the general context of fashion in Germany and as a strategy to raise contacts from local fashion designers, [1] preliminary interviews were initially conducted with university professors of fashion.⁵⁵ Two of them occurred in the form of interviews—with Professors Sibylle Klose from Hochschule Pforzheim and Martina Glomb from Hochschule Hannover—and one of them in the form of questionnaire, due to the availability of Professor Ellen Bendt of the Hochschule Niederrhein. These interviews were also substantial for the development of the general framework for interviews to be later used with designers of fashion companies.

A second approach to data collection involved [2] documentary research in order to address the different profiles of fashion companies and the products they develop. This type of research comprised both the collection of corporate data and data from the fashion collections developed by the companies to be interviewed. This stage of the research preceded the interview and subsidized both the adaptation of the questionnaire to the interviewees and the analysis of the interviews, since the information declared by the designers was paired during the conversation with the preliminary study developed to identify the profile of the companies regarding the visible adoption of fashion trends in products.

The third stage of data collection, which constitutes the largest *corpus*, consists of [3] interviews with designers of fashion companies in the delimited fields—the context of the German and the Brazilian fashion markets. The interviews took place mostly per telephone or in presence and involved an extensive planning and strategy for their accomplishment.⁵⁶ Since this modality of data collection aimed to approach in a deep and complex manner the matter of *agency* of fashion designers of different fashion companies in both contexts, the interviews occurred in a semi-structured way. Each interview was planned in specifically for each company and designer to be interviewed—but the basic interview framework can be found translated into English in Attachment III. In addition, the flexible nature allowed the insertion of issues considered relevant at the time of the interview.

Thus, the methodology that guided the data collection, analysis, and interpretation of this work was Grounded Theory. This approach and methodology uses interviews as the main tool to collect data, suggesting a number of 20 to 30 interviews

⁵⁵ Interviews can be retrieved in Attachment II

⁵⁶ The approaches and detailing of the planning and data collection stages were reported in this chapter in the topics 5.1.1 (Fashion companies and trend report usage in Germany) and 5.2.1 (Fashion companies and trend report usage in Brazil) in a specific way for each of the fields.

before theoretical saturation⁵⁷. Grounded Theory consists of a general methodology for developing a theory rooted in systematically collected and analyzed information (Corbin & Strauss, op. cit.) and is one of the most important perspectives and schools of qualitative research. The analytical and interpretative data step corresponds to the coding step for Grounded Theory.

Having initially collected a set of data, one should proceed to the first stage of reading and re-reading the material in order to begin interpretation. The first step consists of open coding and involves the generation of categories and initial information codes about the phenomenon being studied. Bandeira-de-Mello and Cunha (2006) affirm that open coding consists of disruptions, diagnoses, analyzes, comparisons, conceptualizations, and categorizations of data. During this first step, data is analyzed without a clear orientation but exhaustively, in a procedure called microanalysis.

During this process, the researcher operates a cut in the primary data, opening them in order to understand the phenomenon in depth. In part, such fracture makes it possible to identify and group information, decontextualizing it so that it may be later recovered in a new context, when it may be examined in order to discover properties and dimensions (ibid.). By means of constant comparison, categories appear. Categories are referred to as a *common denominator* to the set (ibid., Soneira, 2007). The creation of concepts and categories not only reduces the data load with which the research will work, but also contributes to the articulation of data in a specific language to approach the phenomenon.

The next step of coding is the axial coding and implies the reorganization of data in another form, examining the relations between categories and concepts. Once open coding breaks the data into concepts and categories, axial coding reassembles the data in new ways, creating connections between categories and their subcategories. The process of establishing relations recreates patterns similarly to a hologram, in which the parts and the whole are constructed in a reciprocal way. The grouping of categories happens as a mode of analysis, since, for the organization and hierarchy of categories, integrations emerge and connections become explicit.

Selective coding involves the integration of the categories developed from the initial theoretical framework. This last stage of codification "integrates the developed theory, examines possible inconsistencies, categories with weak empirical foundations or unstable relationships" (Bandeira-de-Mello & Cunha, op. cit., p.253). Its main goal is to identify the central categories, towards which the others orbit. This coding step is similar to axial coding, but it reaches a more abstract level of explanation of the phenomenon, thus developing it. The coding stages lead to the final integration of the theory regarding a central category. Corbin and Strauss (op. cit.) affirm that the nuclear category should be like the sun, thus establishing, systematically, relations with its planets.

⁵⁷ The theoretical saturation happens when, when collecting new data for the explanation of the theory, the yield is practically nonexistent; when no relevant or new data arises; or when the category is well formulated and validated.

The delimitation of the theory comprises the evaluation of the hypotheses, once again by means of constant comparison between concepts. It is sought to reduce the number of categories, focusing on a nuclear concept that better delimits a theory for the phenomenon under scrutiny or that better explains this phenomenon. It is valid to recall that the whole analysis was based on empirical extracts from the respondents' realities, analyzed in the light of a researcher who is not immune nor neutral to the field, but who brings with herself a set of practices and theories that not only motivated this research, but also influenced its analysis and interpretation. Thus, Grounded Theory implies that the theory does not simply emerge from the data, but from the researcher's exchange with that data.

The choice of the research approaches reflects the objectives of this investigation, emphasizing the conceptual density of the phenomenon under study: the *agency* of designers of fashion companies in relation to the fashion trend reports compiled by experts in fashion trend research, *bureaux de style*. The following sub-chapters will deal, sequentially, with the interpretation of the empirical context in Germany, the interpretation of the empirical context in Brazil, and a substantive joint analysis of both fields of study, which resulted in the systematization of seven levels of trend report usage by fashion designers.

5.1 FASHION TREND USAGE IN GERMANY

The history of German apparel and textile industry is ancient and dates from the Middle Age. In the beginning of the Modernity, the industry spread to rural areas in different regions. Since 1970, the industry has been undergoing a structural change, facing the relative deterioration in its position, where circa 90% of businesses and employees were lost (BMW, 2016). Only 5% of all textiles sold in Germany are produced in the country, but as a reaction to the increasing import competitors, exportation to markets outside the EU begins to expand (ibid.).

As stated by the Federal Ministry of Economics and Energy – BMW, in 2014, the industry's turnover was of € 17,092.1 million, with a production of over 11,442 products, involving almost 78 thousand employees (ibid.). The country is the third strongest in exportation, only after China and Italy. Importation is the second on the globe, after the USA, reaching over € 38 million in 2014. According to Schüssler (op. cit.), "from the new focus on flexibility and speed, the companies that have largely left their production at European locations profit naturally. There are, however, hardly any signs of relocation in the industry, which may also be a further indication of the lock-in", which consists of a challenging situation for the German textile and clothing industry.

As the whole globe, the country's textile and clothing industry faces a fight against the "big, fast and cheap" (ibid.). To do so, they invest in the model of fast fashion full verticals, which has showed to be successful. Companies have been increasing responsiveness to fashion trends by launching collections more frequently and avoiding maintaining stocks. Despite recent changes, the textile and clothing industry in Germany

remains traditional, with mostly exclusively medium-sized companies and ruled by the same family for generations.

As a positive aspect, the sector remains relevant in the international market mostly due to strong and innovative German brands, guaranteeing success in foreign trade, thus fostering its development. (BMW, op. cit.). Factors such as quality and sustainability are important for the German fashion industry, as Berlin establishes itself as the city of sustainable fashion, i.e., ethically produced under fair environmental and social conditions (Bohn, 2016). Technically, the field involves considerable research with institutes and research centers. Differentiation falls upon technical textiles and the diverse application possibilities, as well as the sustainability focus, increasing the export share.

According to the report edited by international research platform Euromonitor, the German apparel and footwear industry in 2015 “registered almost flat volume and current value development” due to unusual weather conditions—a mild winter and a late summer beginning—and the absence of emerging trends and sales concepts. However, in comparison to other countries in Europe, results were not as bad considering the per capita spending in both menswear and womenswear segments. The fitness trend represented a meaningful expansion for the industry, since the *athleisure* trend increases the demand for sportswear to be used as casual clothing, growing the market share of sport brands (Euromonitor, February 2016), such as the interviewed Adidas. The leading companies in the brand rank in Germany remain the full verticals fast fashion companies, having H&M and C&A as their top expression in a fragmented and competitive context (ibid.).

Internet retail grew during 2015, but, for the first time, growth rate slowed down, resulting in a growth smaller than 10%. The possible explanations are the “rising maturity, saturation and the level of competition within online retailing” (ibid.). With the increase of competition and changes that negatively affect society, in a market context of saturation, the German market scenario faces a damagingly influence in the volume and value growth in the fashion industry (ibid.).

5.1.1 Fashion companies and trend report usage in Germany

The interviews in the German context of this research occurred from October 10 of 2015 to April 29 of 2016. For the selection of fashion companies in the German context, fashion brands present in the German market were listed along with relevant contact information. This data collection expressed a strong presence of brands that are not necessarily German but that remarkably operate in the German market. For example, the American brand Esprit has a design and headquarters in the city of Ratingen and 147 stores in Germany (Statista, 2016). Therefore, a list of 70 companies and information on origin and on contact channels was assembled.

Contact occurred firstly by e-mail and contact form, and in a second attempt by telephone. Another strategy for accomplishing a significant amount of companies to

interview was the intermediary contact with fashion design professors, institutions of the textile and fashion branch in Germany, and different colleagues and acquaintances, who could facilitate direct communication with potential interview partners. Regardless of the multiple efforts, companies showed to be very closed and averse to take part in the interview. 22 of the listed companies did not provide feedback regarding the participation in the research and 34 companies declared unwilling or unable to participate.

Companies often justified their unavailability for participation due to lack of time and confidentiality. In two specific cases in which designers were contacted directly, they were obligated by companies to not participate in the research. In one of the cases, the decision occurred after the interview, and in respect to the interviewee, the interview did not comprise the data analyzed. In the other case, one of the company's directors warned that a special contractual clause prohibits employees to provide company's intern content to a third party.

Another strategy to reach potential interview partners was offering a seminar in the context of the Bachelor level of the Design program in the German host University, Bergische Universität Wuppertal. The seminar, usually referred to as DT4, was in the concerned semesters entitled *Modeunternehmen. Design Strategische Studie*, and offered along with the supervisor of the doctoral dissertation, Prof. Dr. Brigitte Wolf. Similarly, students also faced a difficulty in obtaining positive response from fashion companies, reinforcing the general consideration that the field is closed and wary.

Therefore, from the 70 prospective fashion companies, due to opportunity, 12 partners in well-renowned fashion companies were interviewed. The companies are: Adidas, Ilse Stammberger, Stephan Schneider, Dorothee Schumacher, Seidensticker, Tommy Hilfiger, Hessnatur, Tom Tailor, Mustang Jeans, Fond of Bags, Windsor, and Hugo Boss.⁵⁸ The interviews with designers or directors from the brands Hugo Boss, Adidas, Seidensticker, Windsor, Mustang Jeans, and with the authorial designers Ilse Stammberger and Stephan Schneider were conducted by the author, and the interviews with Fond of Bags, Hessnatur, Dorothee Schumacher, Tommy Hilfiger, and Tom Tailor were conducted by students.⁵⁹ Every interviewee agreed with recording the interview for posterior analysis and participated on their own will.

For the Ph.D. dissertation, the analyses were conducted exclusively by the author. The analysis procedures followed the premises of Grounded Theory. The first stage comprehended a long and deep open coding, when codes—often represented by polarities—were generated. During further processes of open coding using the software MAXQDA, codes were altered to best fit the interview data. In total, 56 codes (15 of them macrocodes) labeled 604 text segments in 12 documents. For the axial coding, codes with

⁵⁸ Attachment V comprises the data of the aforementioned interviewed companies, interview partners and interview date.

⁵⁹ Burim Selimi interviewed companies Tommy Hilfiger and Dorothee Schumacher. Franz Brennecke, contacted Hessnatur; Gerrit Färber, Fond of Bags. Marc Stender talked to an employee from Tom Tailor.

more than 25 entries were selected to the analysis and construction of associative maps, aided by the software's feature MAXMaps.

The 11 resultant codes and maps will be presented and discussed in the following order:

1. Companies' orientation for product design
2. Level of trend adoption
3. Product attribute focus
4. Judgment of trend reports
5. Purchase of trend reports
6. Use of trend reports
7. Other sources of information
8. Trends as means of communication
9. Timing
10. Commercial factor
11. Security

Prior to that, efforts were dedicated to present an overview of the interviews conducted in the German field. A pervasive topic in the German interviews was the overall discourse of designers and creative or product directors recalling the brand DNA. Terms such as *brand DNA*, *handwriting*, *heritage*, and *authenticity* permeated the speech of many interviewees. It was remarkable the strong reinforcement of how valuable their brands are, commonly grounded by the long history and tradition of the old German companies. The topic was often adopted as reasoning for the low or non-adoption of fashion trends. For most enterprises, to be trendy would imply the absolute denial of their tradition. An interesting metaphor of "being a flag that moves along in whatever direction the wind blows" expressed by Michael Kampe designer of Hugo Boss was clarifying to the idea.

The danger of being "gone with the wind" falls on the quantity and complexity of trends, since many of them are unsuitable for companies. During the interviews, creatives and directors named companies in the German market—Esprit, S.Oliver and Tom Tailor, known for accepting any possible trend—that now face instabilities due to price-aggressive and quick-producing competition, like H&M and Primark. For many interviewed partners, a brand without a recognizable style can be easily exchanged. For that reason, there seems to be the agreement that brand DNA should be the core to fashion design, operating as a fashion-trend-filter season after season.

The bigger part of the interviewed companies could be considered traditional, since they have a well-established DNA, a stable market, considerable history, and attend a fairly loyal and classic clientele. The discussed topic on timing in the fashion industry concern mostly coordinating trend adoption with the consumers' pace of trend acknowledgment and the acceleration of the fashion calendar. The pace of fashion trend adoption by traditional customers is much slower than by teenage consumers, which tend to buy in fast-fashion retailers. This means that for the public, trends and novelties

need time to be apprehended and understood, and fads are unlikely to be acknowledged or desired.

Most companies in this segment operate on a high-price approach, and invest in textile and cut quality in order to justify prices. The commercial factor of pricing is not often openly mentioned by designers, occurring in a rather veiled fashion. Nonetheless, a need for products to stay between the price boundaries operated by the company is perceptible. Designers from traditional companies, mostly in the premium segment, have a higher disposition for conceding trends to the detriment of haptic-quality, rather investing on what they consider “quality” of basics instead of designing trendy styles with poor textile and materials. In general, designers and directors try to provide the best price-benefit in the different categories, and the topic quality was outstanding in this particular context of the interviews.

Again, it is possible to notice the traditionalism and constancy in the offer of fashion products. Stable companies such as Hugo Boss and Tommy Hilfiger have a massive percentage of the collection composed by last seasons’ bestsellers, often referred to as *moneymakers*. These items are considered those that “save money in the bank”, so they represent “something companies should never risk”. As a common practice, bestsellers are slightly updated and relaunched to assure a percentage of the profit. At the same time, the financially safe bestsellers are also challenging when considering creativity, novelty, and innovation. They are also as limiting boundaries that prevent, to a certain extent, the offer of new designs; which may represent a risk to fashion companies.

Despite the traditionalism of some customers, the current scenario of fashion consumers is marked by the increased trend awareness due to the popularization of fashion information on the Internet. In this context, traditional companies need the insights of fashion trend forecasts to invest in novelties and not uniquely rely on their heritage. For them, the use of some fashion trends as positive because they help aligning companies with the market and making products more attractive, commending the commercial aspect of fashion trends and novelties. They try to equalize critical factors to the fashion business such as creativity and commerce, aiming to find a peak.

The fact that most of the interviewed designers and directors affirmed not to use or not to apply trend information from the purchased trend reports and subscribed trend portals was interesting. Nonetheless, they do not consider the possibility of cancelling the subscription and abort purchasing trend books. Therefore, trend awareness seems to be extremely important to designers and directors in the industry, since many of them wish to be attentive to “what is going on” and find out which direction the market is taking. The recurrent incitation of brand DNA, heritage, and creativity suggests the negativity of “following trends”. The habit is seen as a cheat, an easy move, and expresses lack of creativity and uniqueness. For many interviewees in the German context, strong companies have the ability of making trends themselves. Therefore, there seems to be a continuous effort to discover, live, and express the brand identity, and to remain true to

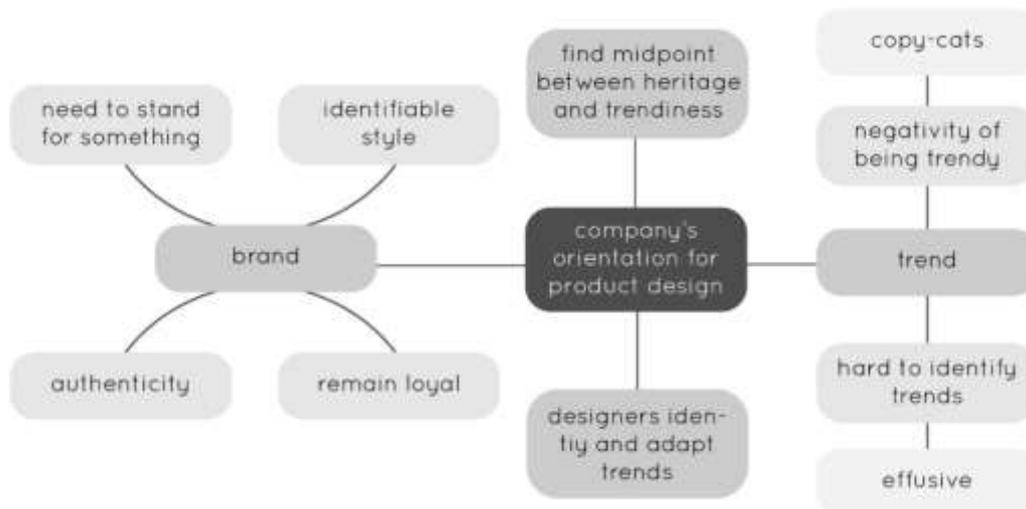
it. At the same time, trendiness equals movement and ephemerality. For that reason, when trends are adopted—because they usually are—there is the latent demand for translating them into the brands’ language; what in the view of many designers would consist of not following trends.

5.1.1.1 Companies’ orientation for product design

The fear of companies when reporting their product design orientation relies on the intricate association between being fully creative and adopting fashion trends. The high level of trend adoption is in their discourse directly related to the need for creativity aids. Some interviewees consider their teams as being able to create fashion trends themselves. Trend orientation connotes a mass-market strategy to the company, mainly adopted by fast-fashion retailers, whereas more traditional brands feel the need to stay loyal to the brands’ heritage and to the styles and cuts that their customers expect to find available.

Most enterprises try to adopt an intermediate approach to product design orientation, aiming at finding a middle ground between heritage and trendiness. This intermediate point is a fine line to meet each season. Trend and brand-orientation vary throughout the many collections they design every year. Sales data provide clear guidance on which styles, colors and fabrics sell better and generate the most profit. However, trends update the collection and the broad-spectrum of the brand, influencing their DNA as fashion brands. Therefore, the main activity of fashion designers and creative directors in the fashion business regarding trends is to identify them and test which trends to adopt—and adapt—and which trends to discard based on the brand’s DNA.

Figure 60 Summary map of the code companies’ orientation for product design



Source: Author

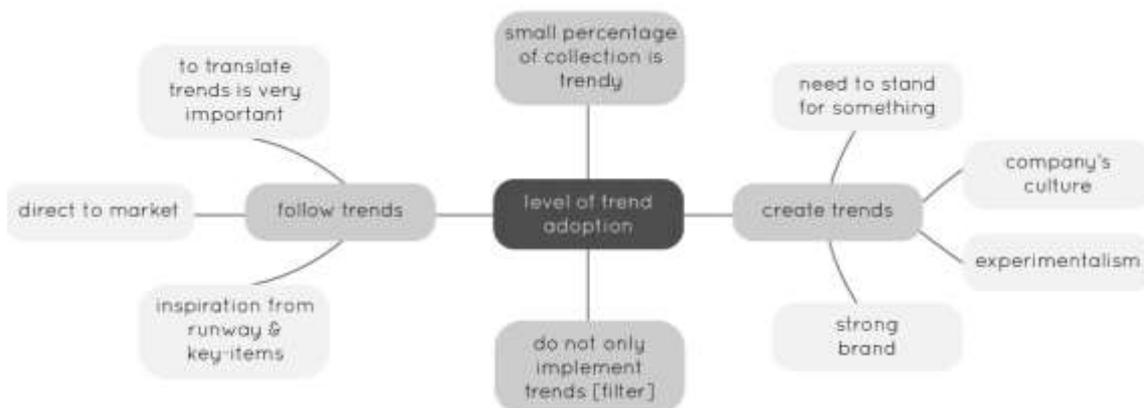
5.1.1.2 Level of trend adoption

The level of trend adoption consists of finding the optimal intermediate between trendiness and recognizable brand style. Two sets of poles were involved in the discourse of the interviewees: [1] to follow X to create trends, and [2] to apply X not to apply trends

into products. The stated creation of trends causes a noteworthy pride in designers and directors in the fashion business. Particular aspects of companies that attest to creating trends are a strong brand DNA and authenticity. Many of these “self-created” trends come from a unique and unstructured creative process. This is conducted mostly with independent designers and lifestyle brands, which have an urge to be more avant-garde or present a fashion-forward approach.

The interviewees that on a discursive level affirm not to apply fashion trends mainly refer to too many trends not consistent with the company’s DNA— ratifying the too large offer of fashion trends. Specific trends can be adopted by more traditional companies after making sure that such trends will last over three years. Another prominent aspect is that only a small percentage of the collection is affirmed to be trend-oriented, implying a strong commercial drive in maintaining long time basic bestselling products, which are only updated. At the same time, there is the need to insert novelties every season to attract customers to the store and to position the brand as fashionable and updated. In this regard, fashion trends are adopted on a small scale but play an important role.

Figure 61 Summary map of the code level of trend adoption



Source: Author

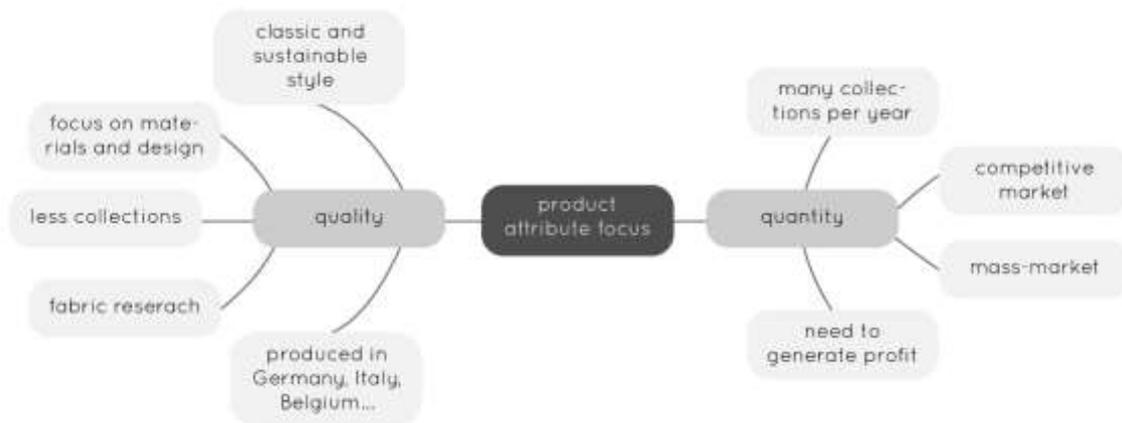
5.1.1.3 Product attribute focus

In the speech of fashion companies’ representatives, trend is, at some level, associated with lower product quality. The general concept of quality usually suggests the quality of textile materials. In some arguments, an association with design as creativity and aesthetic values, as well as haptic qualities other than textile, regarding cut, fitting, and manufacture locations was implied⁶⁰. Although all companies try to deliver the consumer the best price-value relationship, some companies were clearly more quantity than quality-oriented. The speech also suggests that mass-market fast-fashion chains tend to attract a younger/teenager public, with less purchasing power and more eager to consume trends produced with cheaper fabrics.

⁶⁰ I acknowledge the flexible use of *quality* and the many possibilities that the word implies. The crop here used derived from the coding procedures and it applies to these specific cases.

Companies in a premium segment are generally more textile quality oriented. Having traditional and highly recognizable companies, they count on an old and loyal set of clients that pay the price of the segment. In that sense, such companies design and produce fewer collections throughout the year, and the garments cost remarkably more than mass-market brands. Manufacture processes are also associated to product quality, mostly regarding cut, fit, and production location. There is a positive connotation for garments produced locally in Germany or in textile traditional countries in Europe, such as Italy and Belgium. Pattern techniques like workmanship and tailoring are also highly valuable in the designers' discourse as contributing to the haptic quality.

Figure 62 Summary map of the code product attribute focus



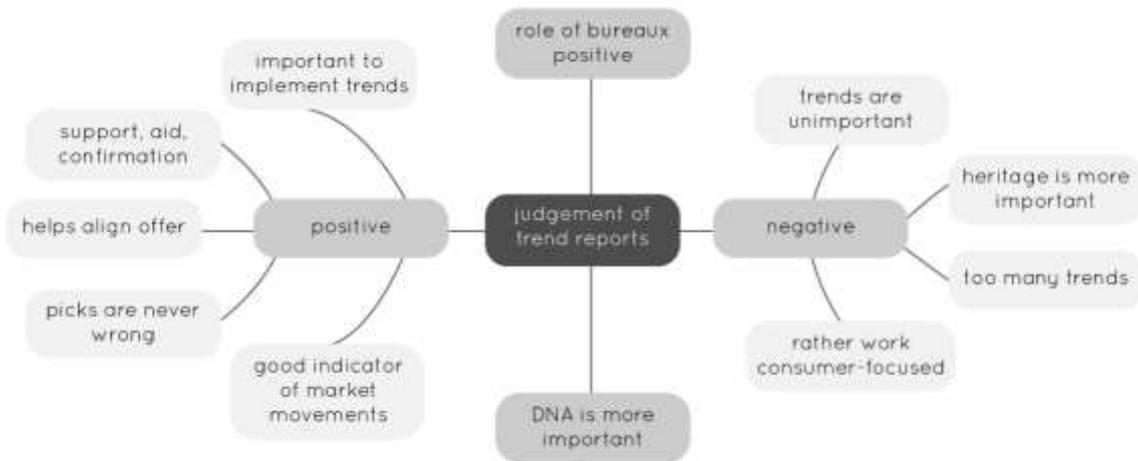
Source: Author

5.1.1.4 Judgment of trend reports

In general, the interviewed designers and directors in general considered the role of *bureaux de style* in the fashion system to be positive. Trends are reviewed as the motor force of fashion, since the fashion industry works in anticipation and all works require foreseeing. Fashion trends are more important to commercial brands on industrial level, unsuited for the experimentalism and inventiveness of independent designers. In that sense, the industrially large volume produced fashion products tend to follow and work on easily identifiable homogeneous trend themes. Therefore, fashion trends are meaningful in the fashion business mostly because they attract customers.

At large, designers enjoy the trend awareness provided by trend reports, since they provide a good indication of “where things are heading” and can be used flexibly as support, aid, or confirmation. Some designers freely attested enjoying working with trend reports, although reinforcing that it would not be dramatic to work without them. A good deal of companies has a negative view of trend reports, despite the fact that they purchase them and sometimes even attend seminars and events. The argument remains the greater importance of the brands' DNA and heritage. Other designers find the wide offer of trend topics to be overwhelming and, for that reason, trend reports somewhat disturbing, because they lack clear guidance.

Figure 63 Summary map of the code judgment of trend reports



Source: Author

5.1.1.5 Purchase of trend reports

Despite the remarkable negativity in the speeches regarding fashion trend reports, almost every interviewed fashion company purchases one or more of them. The only ones who do not to purchase any trend reports were the authorial German designers, Stephan Schneider and Dorothee Schumacher, and the sustainable brand Hessnatur. In general, all companies have at least the subscription of WGSN, with the exception of the German independent designer located in Cologne, Ilse Stammberger, who buys the View Magazine. Along with WGSN, the most purchased fashion trend reports are the aforementioned magazine, and the Australian *bureau de style* Scout. Also listed were the workshops from Carlin, Peclers, and Trend Union, trend books from Added, and reports from the Deutsches Mode Institut (DMI).

Figure 64 Summary map of the code purchase of trend reports



Source: Author

The features found on each of those reports are more or less appreciated by the creative team. The presentations from Carlin and Li Edelkoort, from Trend Union, are considered inspiring and all-purpose, allowing design teams to work freely with their insights. On a more product-focused approach, the trend directions from Scout are applicable and View Magazine is appreciated for presenting color schemes and their seasonal developments, as well as fine drawings. WGSN preferred hallmarks are information on market and retail, despite the fact that some consider the trend information itself fairly conceptual and rather disconnected from the industry's reality.

5.1.1.6 Use of trend reports

Many companies mentioned purchasing the fashion trend forecast information and not using it much. Companies like Windsor and Hugo Boss find that the premium segment of fashion operates on a slower pace. They focus on offering customer timeless styles, worthy of the financial investment they make when purchasing their products. For Adidas, the company's ability to rely on its own heritage makes trend reports unimportant. Hugo Boss and Seidensticker find WGSN trend themes too fashion forward, too extreme, and difficult to adapt to the branch. Fond of Bags enters the fashion trend portal rarely, and most part of the designers are unaware of the access to the WGSN.

The companies that affirm to use fashion trend reports also consider marketability important. Many use them to guide minor modifications in the already designed garments with the intention of creating market coherence. Fashion trend reports are mainly used in three different form: [a] for inspiration, [b] for application, and [c] for ratification. The major use of the reports is as [a] inspiration. *Bureaux de style* deliver reports that present, first, a big direction to designers, providing sound guidelines to begin a collection. They filter and summarize the consuming and social atmosphere and present the most important focal points for each season.

The use of fashion trend forecasts for [b] product application consists of following product instructions on product attributes; such as details, fabrics, silhouettes, and color. The most applied product directions concern color schemes. Fabric insights are less important but also relevant. Most traditional companies avoid the early adoption of product direction trends on silhouette and prefer to wait for the cut development over the seasons, in order to identify if the trend is a fad or not.

Finally, information can be applied for [c] ratification. In this case, trend reports are mostly valuable in further stages of product development, also as an aid for decision-making. At a stage where the creative team needs to decide which products will be part of the collection, trend conformation can be one of the trial criteria, as it is in Tommy Hilfiger. Companies may have two reactions to ratification: to quickly adopt or to intentionally avoid trends. No company directly reacts to fashion trend reports by intentionally avoiding fads. However, many companies considered evading product ideas if they are already offered by other brands with the intention of having a remarkable style and a unique proposal.

Figure 65 Summary map of the code use of trend reports

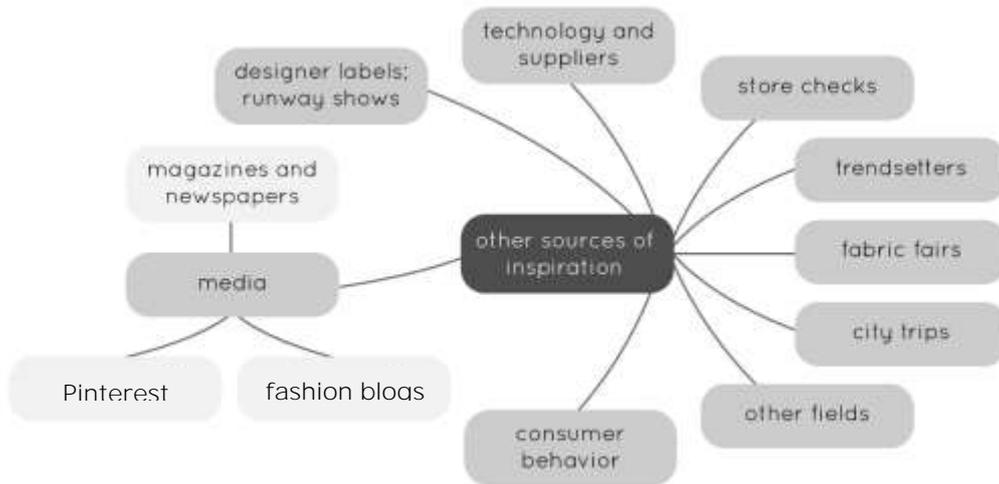


Source: Author

5.1.1.7 Other sources of information

The companies that do purchase trend books and subscribe to trend portals from *bureaux de style* strongly declared that the reports did not consist their only source of fashion trend information. Fashion companies that do not purchase the reports also mentioned more reliable and effective fonts for thematic and product stimulation. Most companies go on city trips for focused collection inspiration or for general street style research. Some city trips also include store checks, visits to designer labels, and the attendance of fashion and textile fairs. Interestingly, fairs remain an important inspiration and fashion trend information source, along with the contact with suppliers that constantly work with technologic innovation.

Figure 66 Summary map of the code other sources of information



Source: Author

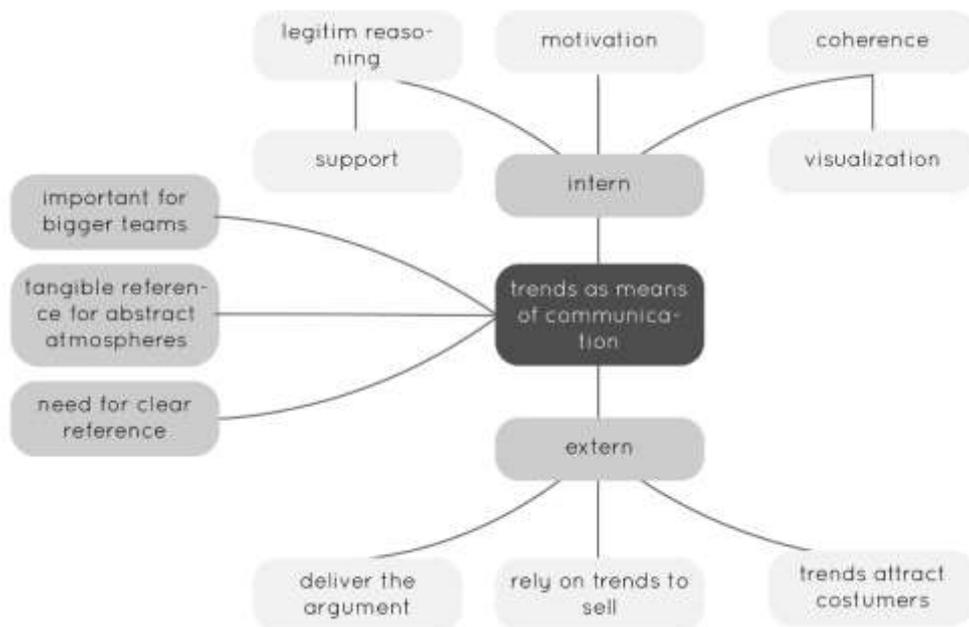
Runway shows from *prêt-à-porter* are sources of inspiration as well, since they offer direct product references. The overall media is inspiring for designers and other creative workers. They read magazines and newspapers, especially from other fields, such as interior design, architecture, and business administration. The administration magazine Brand Eins was cited as “obligatory read” and as “extremely insightful” to

understand consumer behavior and demand. Fashion blogs, Instagram accounts, and other insights from trendsetters compose the favorite media. Indeed, Internet seems to have changed research in the fashion industry. Every single company declared blogs as being resourceful. The application and social network Pinterest was also often referred to as an advantageous tool for image and style search, outgrowing trend reports.

5.1.1.8 Trend reports as means of communication

Specifically in fashion design, communication involves the expression of intangible concepts and atmospheres that serve as inspiration for collection development. However, to explain an ethereal idea without existing references is rather tortuous. The size of the design or creative team influences the tendency of complications in communication. The bigger the team, the more difficult it is to communicate a concept. The use of fashion trend reports as a communication strategy can solve such conflict, since reports present clear references in terms of product guidelines. They also offer inspiring stories written in a particular rhetoric, providing a universe of possible symbolic associations. These considerations address trends as means of internal communication in fashion companies. In this respect, trends are useful ways of creating intern coherence.

Figure 67 Summary map of the code trend reports as means of communication



Source: Author

Another important—perhaps the most important—use of trends as communication tools concerns the hierarchical communication with CEOs. Creative workers have a specific focus and, therefore, means of expressing their work. When in need to communicate decisions or to reason their designs for financial or executive directors, their arguments on aesthetic or product performance are often seen as unimportant. The legitimacy of *bureaux de style* works as an incontestable argument. Directors in general trust the expertise of the *bureaux de style*, which they believe to

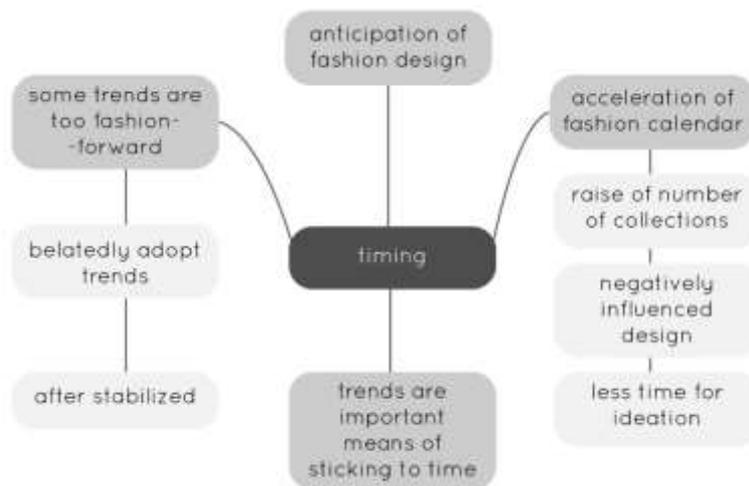
create market coherence, aligning products with the consumers and increasing the chance of commercial success.

In that same sense, fashion trends can also be used for external communication, since trends tend to attract consumers. They are, therefore, used as argument to sell. Even when trendy, extravagant key-pieces sell badly, they make the offer more attractive and incite customers to come inside the store. More than stimulating consumers to buy, trends help to deliver the argument that the brand is at the right pace with the *Zeitgeist*.

5.1.1.9 Timing

Different modalities of fashion companies have different behaviors concerning timing in the fashion system and fashion trends. Trends are important means of sticking to the time, but it is crucial to understand *how* consumers react to the trends and *when* they react to them. Fashion trend reports have been considered too fashion-forward and, for that reason, scarcely used in the traditional and premium segments. Since their consumers tend to adopt a trend three seasons belatedly, they need to filter trends also apropos their degree of novelty. Such degree directly influences the collection's marketability, and the early launch of trends could be financially and strategically uninteresting for the companies.

Figure 68 Summary map of the code timing



Source: Author

The quantity and regularity of collections per season was influenced by the fast-fashion acceleration of the fashion calendar. Companies, both traditional ones and the ones that work on an industrial level, mention the length of the fashion fabrication calendar and the difficulties to deal with anticipation. Regarding trend adoption, designers feel insecure, since they plan the collection from 12 to 18 months in advance, not knowing if trends will still be successful by the time their collections hit the stores. Explicitly the fast-fashion company Tom Tailor —launching 13 collections per year— references the pressure for speed and profit in the segment. Overall, designers agree that the acceleration of the fashion system has negatively influenced the creative and inspirational processes, which were minimized and occur in short and intensive phases.

Designers mention the lack of time for idea incubation, so significant for the creative process.

5.1.1.10 Commercial factor

For traditional companies, trends are efficient ways of making their products attractive. However, 70 to 90 percent of the product offer is based on sales data and composed by bestseller basics, often referred to as *moneymakers*. Through sales data analysis, companies gain awareness of best marketable features. This is particularly effective with a traditional clientele that is used to shop selected styles from specific brands, especially due to cut and fitting.

Independent designers criticize the current fashion system operating logic and its extreme commercial orientation. For them, fast fashion influenced the commercialization of clothes at rock bottom prices, reverberating in terrible work conditions and poorly paid handwork. For that reason, independent designers tend to produce in Europe (Stephan Schneider in Belgium, Ilse Stammberger in Cologne, Germany, and Dorothee Schumacher in Italy) with certified materials. Of course, the effort has its costs, along with the exclusivity of designs.

Figure 69 Summary map of the code comercial factor



Source: Author

For brand companies, fashion trends are important to sales. As declared in a previous topic, trends help brands communicating with customers by delivering an argument. The fast-fashion company Tom Tailor spoke openly about the commercial factor of fashion and the strong pressure that comes from competition regarding product offer and price. The focus on quantity and the need to profit under all circumstances

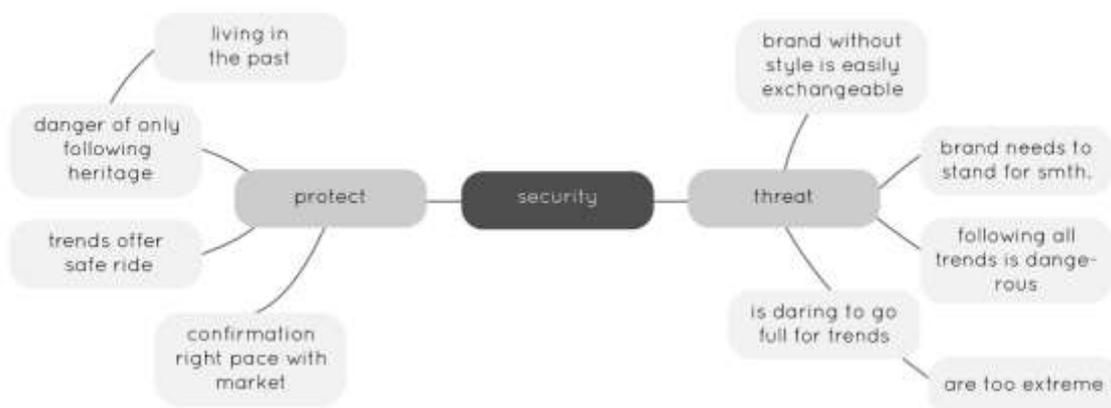
drives the price-performance. Mass-market companies' main benefit is the renewed aesthetic and low prices. The adoption of fashion trends is specifically important for this type of company, since they need to bring commercial fashion trends to the consumer at the right time.

5.1.1.11 Security

The topic security was constant in the discourse of almost every interviewee. There seems to be a contradiction regarding the perception of fashion trends. Generally, three main ideas come as reasoning for the relationship between trends and security. The first one [1] consists in the danger of following all fashion trends. Designers agree that *bureaux de style* offer too many trend directions and trends are considered to be plural and extreme. The [2] second main group of arguments surrounds the idea that creating trends is daring, since trendsetters are audacious and less afraid of taking risks. In this sense, avoiding trends would be safer, since many companies already have a stable product offer that generates profit. Nonetheless, too much safety could also compromise the brand's image by presenting the brand as outdated. Lastly, the [3] trends would bring safety by uniformity. This approach is adopted by fast-fashion and mass-market brands that attract, among other, young people. Likewise, the advanced knowledge of fashion trends would be a manner of confirming the future consumption disposition.

Specifically regarding fashion trend reports, they are found to be [a] protector companions, providing confirmation that designers follow the right path with their propositions and seen as a helpful tool for fashion research, although not the only one anymore. From another perspective, the [b] threatening aspects of trends reports mostly recall on the danger of falling in "a common place" and not building a strong brand image and style. As expected regarding the big focus given by interviewees on brand DNA and heritage, the idea of following the trends conveyed in reports is dangerous because it would be contrary to the idea of developing an identity.

Figure 70 Summary map of the code security



Source: Author

5.2 FASHION TREND USAGE IN BRAZIL

According to ABIT (Brazilian Association of the Textile and Confection Industries) on data updated in 2016, the textile and apparel industry in Brazil is one of the strongest in the country and dates from 200 years back. With a productive force of 32 thousand companies, 80% of which are small and medium-sized manufactures, the field employs over 1.6 million direct workers, being the second largest employer in the processing industry in the country. The branch generates annual revenue of US\$ 39.3 billion. The sector is relevant in the international market mostly due to the dimension of the textile production park, being the fourth largest production space in the world (ABIT, n.d.). The retail segment in apparel reaches the number of US\$80 billion in Brazil alone.

The average production of clothing rounds 6.7 billion pieces of clothing, socks, accessories, and homewear, and the textile production approximates 1.8 million tons. With that, Brazil is the fifth largest textile producer in the world, the second country in the production of denim, and third in production of knitwear. Brazil is among the five largest Fashion Week in the world and is a reference of beachwear, jeanswear and homewear, having also seen an increase in the segments of fitness and lingerie. With the discovery of the Pre-salt, Brazil will stop being an importer to become a potential exporter for the World Synthetic Textile Chain. Brazil is still the last complete textile chain of the West, maintaining the fashion chain from the production of the fibers to the runway shows, going through spinning, weaving, processing, confections, and a remarkable retail market (ibid.; Pires, 2014).

During the year of 2015, Brazil had its worst economic performance in 10 years. In the year of 2015, exportation rate grew, whereas imports decreased. Investments in the sector contracted from 2014 to 2015 from US\$ 1,091 million to US\$ 869 million (ibid.). Due to a financial and political crisis, unemployment and inflation, the country saw consumer and business intentions fall. However, the fashion industries (apparel and footwear) managed to maintain a modest growth in value sales and maintain the growth in volume (Euromonitor, March 2016). With the expectation of shrinkage of at least 3% in the year of 2016, but with the political intention of giving credit to aid companies to overcome recession, the country should recover only after 2017.

Brazil's apparel and footwear companies face several challenges such as rising costs, a complicated taxation system, high interest rates, inflation and a drop in consumer confidence that directly impact sales. On top of that, domestic companies face competition from international brands such as Nike, Adidas, Zara, Gap and Forever 21. Consumers are looking for cheaper items, which could drive some major retailers into a price war in order to attract these consumers (ibid., n.p.).

The top five players in the Brazilian industry are fast fashion retailers Renner, C&A, and Riachuelo, and the retailers Alpargatas and Nike, according to Euromonitor. Fast fashion fosters the consolidation and expansion of their businesses and the sector lives a good moment, despite the recession. Likewise, Internet retail grew in 2015 due to web sales strategies, free shipping deals, and special prices and promotions. Nonetheless, unlike Germany, the value of purchases is likely to decrease with the prospect of

customers purchasing cheaper apparel and footwear goods. According Euromonitor’s studies, “the low-cost trend set by the fast fashion industry is expected to consolidate and the industry might see some companies engaging in price war strategies in order to gain attention of consumers that have budget constraints and are looking for cheaper deals” (ibid.). In short, the Brazilian fashion goods sector needs to resume the growth trajectory it had led in the years prior to the crisis in order to regain its competitiveness in the international market.

5.2.1 Fashion companies and trend report usage in Brazil

Interviews in the Brazilian context took place from August 4th to November 28th in the year of 2016. Just as conducted during the first stage of interviews and their preparation, in order to comprise the data sample, 74 fashion companies of high and medium recognition were listed and contacted. From the total, nine companies no longer exist or claimed to be unavailable for the interview, 48 did not provide feedback either in the first or second contact attempt, and from the 17 companies willing to contribute with the research, 12 were selected to comprise the sample. They are: FILA, Giuliana Romano, Lui Iarochescki, Isabela Capeto, Happy, Dudalina, Lenny Niemeyer, Riachuelo, TNG, Melissa, Alphorria, and MOB.

The criteria for selecting a designer or product manager to interview was based mainly on parities with the already interviewed German companies, with the intention of carrying out an analysis as coherent as possible, being aware that an exact comparison would be impossible. The companies were, then, selected according to their product specification (Chart 6). Specifically, the company *Lenny Niemeyer*, who works as an independent designer and exhibits in Fashion Weeks, addressed the topic of "place-related fashion know-how", inserting the category Beachwear in the Brazilian context, whereas in the German context the company *Hessnatur* was assigned as eco-brand.

Chart 6 Interviewed fashion companies in Germany and Brazil sorted by product type/positioning

Interviewed fashion companies in Germany							
Sport	Independent designers	Traditional [shirts]	Place-related	Fast fashion	Denim	Accessories	Premium
Adidas	Ilse Stammberger	Seidensticker	Hessnatur	Tom Tailor	Mustang Jeans	Fond of Bags	Windsor
	Stephan Schneider	Tommy Hilfiger					Hugo Boss
	Dorothee Schumacher						
Interviewed fashion companies in Brazil							
Sport	Independent designers	Traditional [shirts]	Place-related	Fast fashion	Denim	Accessories	Premium
FILA	Giuliana Romano	Happy	Lenny Niemeyer	Riachuelo	TNG	Melissa	Alphorria
	Lui Iarochescki	Dudalina					MOB
	Isabela Capeto						

Source: author

Prior to the interview, in a stage to adjust the interview's framework, documentary research on the concerned company was conducted. Research sought to collect data about the company, number of employees, revenue, market niche, etc., and images of two fashion product collections.⁶¹ The study allowed to delimitate sets regarding the interviewed companies and to conduct the data analysis on a more stable base.

Interviews were recorded with the permission of the interviewees, who also verbally stated to agree to freely participating in the research. The author transcribed the audio documents and conducted data analysis foremost with the aid of the MAXQDA software in all stages, as outlined by Grounded Theory. For the open coding, the codes applied to the interview analysis in the German context were used. The Brazilian context required the inclusion of new codes and the exclusion of others.⁶² From 12 documents, 728 coded entries referred to 59 codes in total, whereas 20 of them were macrocodes and 39 subsidiary codes.

For the second stage of the analysis, axial coding, the codes with exactly or more than 40 codes, were imported to the software's visual extension program MAXMaps, where each of the 10 trialed codes were analyzed in depth. The referred stage analyzed the code and sub codes as well as all the retrieved document quotes, adopting new codes when necessary. Similar entries were adhered to each other, and others considered irrelevant were excluded or synthesized, and the most expressive and explanatory terms were selected and given the considerable focus.

The 10 selected codes and resultant maps will be in this work, further presented and discussed in the next pages, following the order:

1. Timing
2. Filtering
3. Level of trend adoption
4. Other sources of information
5. Trend reports as means of communication
6. Use of trend reports
7. Commercial factor
8. Orientation for product design
9. Security
10. Judgment of trend reports

⁶¹ This collected and briefly analyzed data comprised a succinct study, presented in Attachment III. The study's goal was to acknowledge in a more or less structured manner, the company's orientation for product design, positioning and mostly and most important for this PhD dissertation's interest, the level of trend adoption in products.

⁶² A chart with the specific codes applied in the coding procedures in Germany and in Brazil for comparison can be found in Attachment VI.

A preliminary and comprehensive presentation of general topics regarding the Brazilian context of the research was found to be appropriate, since many questions worth discussing did not reach the minimum number of entries. Nonetheless, from a qualitative perspective, they are highly contributive in view of adumbrating and enriching the discussion of the specific topics hereinafter.

It was worth noticing, in the Brazilian interviews, the reference to European and North American fashion and fashion brands. Many interviewees mentioned the need to be in accordance with fashion trends and styles adopted in the Northern Hemisphere. On the one hand, the late adoption of trends—partly due to the seasonal incongruence between the north and south hemispheres, partly due to the history of Europe fashion cradle and its legitimacy as a trendsetter—provides an extra degree of certainty to Brazilian companies, since new trends and styles are firstly put to test by European and North American fashion houses. On the other hand, being in the rearguard of fashion seems disappointing. Therefore, there is a concern in the relational delay of Brazilian brands in receiving imported and "belated" trends from Europe and the USA.

Independent designers have, however, achieved independence from foreign trends and fashion influences, focusing on their authorial aura. Commercial companies still rely on previously launched and adopted fashion trends; trips to Europe and the United States of America are custom, as is the access to brands' websites and Instagram pages. The old-fashioned practice of photographing store windows and products survives, as a remnant of the copies mentioned to have happened in the 1980s and 1990s. The best alternative implies the alteration of previous fashion trends, having as the most important factor the references of the local consumer public. Specifically addressed in the product characteristics of color, print, and fit, designers feel the need of adapting trends to the local public, which may be the biggest challenge of trend analysis inside Brazilian companies.

As in Germany, trend research and analysis is a task for fashion designers and directors. Many of the interviewees mentioned the wish for more time in conducting the task and accessing trend portals, or searching for trends online. In some cases, the time spent on trend and product research overtook the collection's planning and development calendar, becoming more continuous than non-existent. Overall, there was a complaint from the designers in conducting too many activities, several of them with bureaucratic content. The size of collections was also expressive of a heavy workload, obviously more expressively in fast-fashion and in highly commercial companies.

The commercial factor, which will be further detailed, is still more important to fashion companies than the adoption of fashion trends. However, directors and decision makers tend to accept WGSN as a relevant argument to accept the application of fashion trends in products, since the *bureau de style* created a legitimized image of assertiveness for itself. Although frequently used by all companies, sales data mining is not considered a substitute for fashion trends from the designers' perspective. Despite helpful, it focuses on showing results of what was sold today or yesterday, while trends direct to the future.

Notwithstanding, this sort of information is an ally in choosing which trends to adopt and assisting assembling the basic and core fashion mix.⁶³

In general, Brazilian designers seem positive regarding searching for and adopting fashion trends. From the selected interview partners of brands, i.e., excluding designers from authorial brands such as designers Elza Bastos from Giuliana Romanno, Mariana Lima from Lenny Niemeyer, Isabela Capeto, and Lui Iarochescki, who were mostly indifferent to fashion trends, the designer (with architecture degree) Edson Matsuo and the marketing director Vanessa Cabidelli were the most critical to fashion trends conveyed by the *bureaux de style*. It was interesting to identify that those with vocational training outside fashion are more faultfinding, detracting of the *bureaux de style's* services. Despite having an interesting relationship with trend forecasting companies and subscribing to two portals—WGSN and UseFashion—the first professional mentioned trends as the crutches of designers and warned of the power of trends. The second, as a marketing director, recently cancelled the subscription to WGSN by realizing the exact situation, identifying that designers from Alphorria accessed the portal only prior to the presentation of the collection for the director board, as a manner of confirming the trends and styles previously created by them.

5.2.1.1 Timing

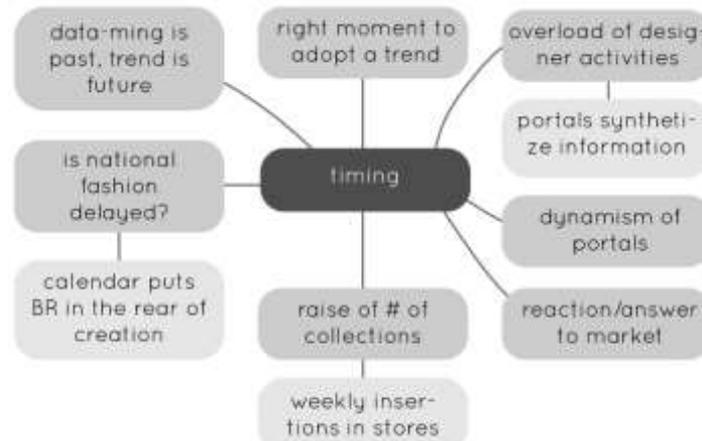
Some topics regarding timing in the fashion industry addressed from the Brazilian perspective were already mentioned, such as the overload of activities of fashion designers, and the relational delay of Brazilian brands in adopting fashion trends six months after northern hemisphere countries. Also representative in the analysis was the numeric increase not only of products and collections, but also the insertion of dates. As a form of stimulating consumers' desires, many commercial companies have monthly or weekly store product insertions. Cases of capsule collections or special product offer for commemorative dates are also recurrent.

The correct timing in adopting a certain fashion trend is also worth commenting. A more commercial positioning usually requires the confirmation that the trend is well disseminated and will be a commercial success. Often corroboration in big retail players, such as the European Zara and H&M, or in runway shows is searched as a way of minimizing risk for the approval of a specific product. Often, products considered too fashion-forward reverberate in bad sales numbers. Designers see the fast growing pace of fashion as challenging for fashion companies and for the *bureaux de style*. At the same

⁶³According to Treptow (2013), the fashion mix refers to the percentage of product distribution with different life cycles (basic, fashion and conceptual). Basic products are models that repeat from collection to collection and have practically guaranteed sales, such as shirts or a traditional pair of jeans. The fashion category considers models committed to the season's trends in terms of colors, shapes, and materials. The conceptual pieces are complementary and committed to future trends, not always commercial, they are mostly used as a strategy, generally used in windows, catalogs and campaigns, due to their high impact and their ability to catch consumers' attention. During the interviews, a more referred to model divides the mix in the categories basic, core, and fashion.

time, the services of *bureaux de style* respond directly to another topic concerning timing in fashion: designers' and companies' lack of time. To have access to those fashion trend portals is perceived fundamental for obtaining information.

Figure 71 Summary map of the code timing

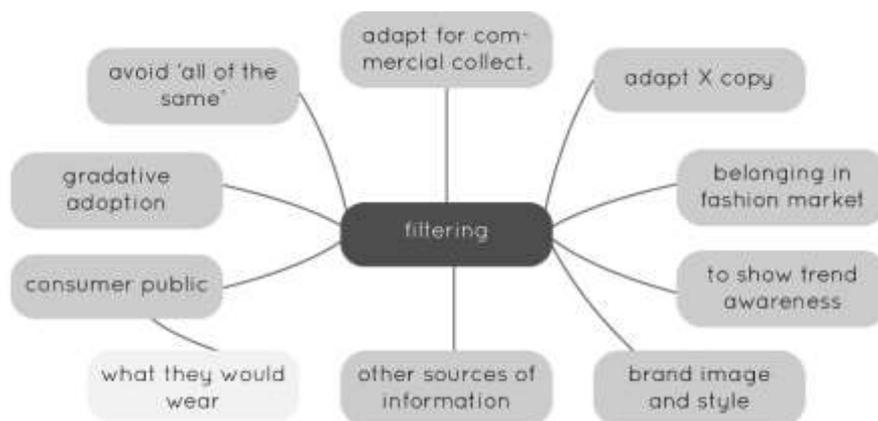


Source: Author

5.2.1.2 Filtering

An important aspect to consider is the abundance of possible trends presented each season. The filtering of fashion trends to be adopted by the company falls on a recurrent issue in designers' speeches: that the literal adoption of fashion trends would be copying, a practice with bad connotation in this creative industry. Filtering allows, foremost, adjusting fashion trends to the brand's image. The practice of equalizing fashion trends and brand identity is frequent for fashion designers. As in Germany, interviewees affirm that some trends would never be adopted, in the cases that would ruin the brand's image or credibility.

Figure 72 Summary map of the code filtering



Source: Author

The consuming public also seems to be the focus of the filtering processes. Designers find it reproachable to adopt trends that do not concern their clients. The filtering of trends is a common practice, particularly considering the consumer public that conditions its selection, according to parameters of Brazilian taste, style and climate. The

designer of the fast-fashion chain Riachuelo mentions the sales failure of adopting the *midi skirt* in Brazil, mostly in the Northern region, where women have a shorter stature.

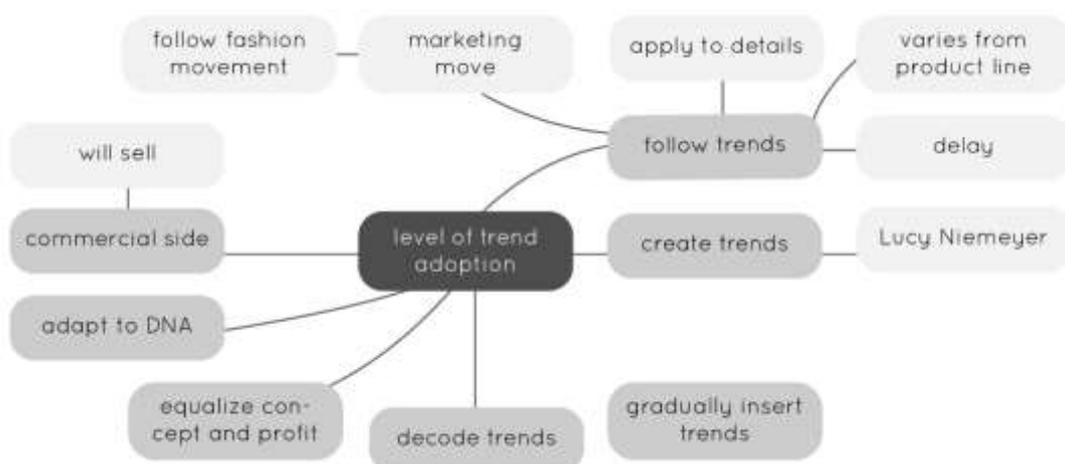
From the many options provided, other sources of information are used to best filter which trends to adopt. Information of various sources are crossed, and the data source is also relevant when analyzing if a trend is suitable for the brand and strong enough to contribute to sales or strategy, since, as will be further detailed, trends may be adopted simply to display knowledge of trends.

5.2.1.3 Level of trend adoption

The level of fashion trend adoption varies in the different products and product lines even within a same brand. Generally, designers refer to a percentage between 5 and 10 percent to indicate how many trend items they insert in their collections. Apart from the percentage, other trend information is diluted in the collection in more commercial items. The companies that deliberately affirm to apply trends to their products (8 out of 12), even when not subscribing to trend portals or purchasing trend reports and books, do it during the stage of collection planning and development for different reasons, including trend references in the garments.

From the interviews and their in-depth-analysis, trends look as if they operated more as a strategy to exhibit coherence with the fashion industry, marking the belonging in the fashion market and sphere as a brand with added value and a differentiated image. At the same time, the statement from designers regarding the minimal proportion of trend adoption seems to demonstrate an inaccurate perception from the interviewees, which is identifiable by observing the brands' fashion collections'. Whereas the level of trend adoption is usually medium in commercial brands and high in fast-fashion companies, it seems inexistent in the creations of authorial designers. Authorial designers and their teams do not search trends for product development, but are influenced by various different information sources.

Figure 73 Summary map of the code level of trend adoption



Source: Author

5.2.1.4 Other sources of information

Cross-reference information is referred to as a common practice widely in the fashion branch. Fashion designers are responsible for conducting trend forecast and are used to absorbing inspiration from various channels. Some companies (Melissa, Riachuelo and Happy) have their own trend consultants and even count on an intern fashion research team (Melissa and Riachuelo). Nevertheless, every designer has access to trend portals, forecasts, and to the different information available on trends inside the company. Other intern information sources in companies correspond to: [1] visits to the shops and contact with sales assistants; [2] sales results and sales data analysis; [3] designers' own desires, usually authorial; and [4] the historic of the brands' previously launched products, investing in the brand heritage and long-lasting style.

Outside the company, every experience can be seen as creative input for fashion design. Leisure and business travels – to the European “fashion capitals” and to the local metropolis, São Paulo – are considered the most interesting foundations. The most commonly cited sources are traditional art and media, and consumer behavior analysis. Textile and fashion fairs do not occupy a central role for Brazilian companies as for German companies. The only company who mentioned *Première Vision* and *Milano Unica* was Giuliana Romanno. More common in Brazil was the participation in lectures promoted by fabric suppliers. Mentioned as having changed the mechanism of fashion, the Internet provides designers access to different websites and social networks. Instagram and Facebook were more frequently cited. Consumer behavior and streetstyle websites and blogs also deliver much appreciated inspiration. The application Pinterest is used by some companies, but with less prominence than in Germany.

Figure 74 Summary map of the code other sources of information



Source: Author

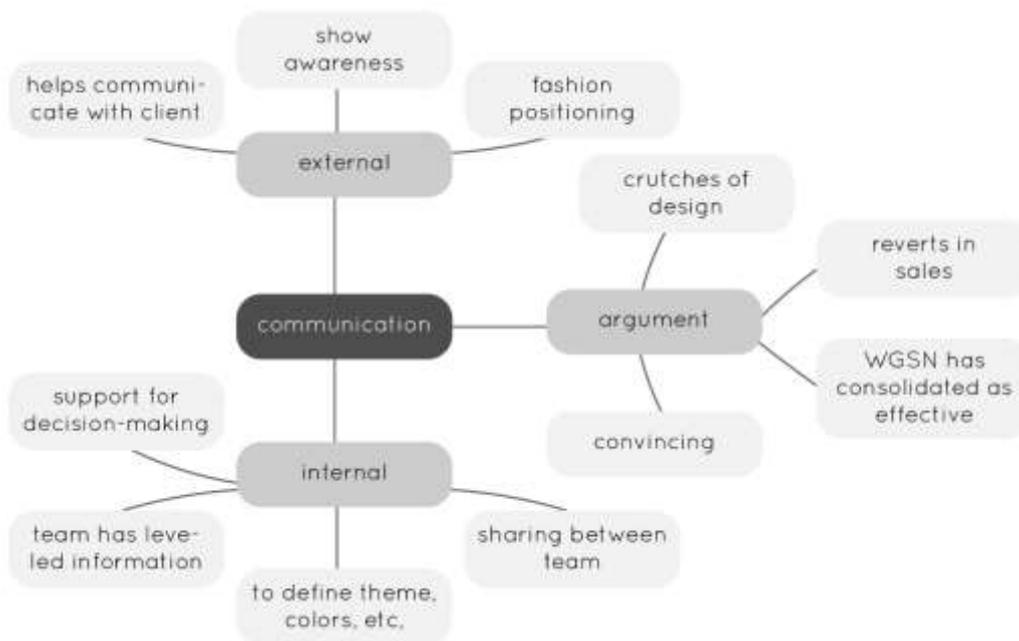
5.2.1.5 Trend reports as means of communication

Fashion trends can be used as a means of intern and extern communication. Internally, they can create coherence, mostly aided by trend *bureaux de style*, since the

design team has a common foundation to base designs creations and decisions. Also, the artifact of forecasts for intern communication is employed as reasoning for argumentation between designers and other decision makers, relying on the legitimation of *bureaux de style*. Almost every designer who has access to trend portals agreed to have used trends for the persuasion of the direction board. According to the interviewees that rely on the fact that WGSN, for instance, is competent in what it does and has built itself a good and assertive reputation, being effective in convincing managers.

Creative director at Melissa sees such employment negatively, as “the crutches of design”, a support for unstable designers and ideas. He works with WGSN but does not use it as an argument, which instead should be the emotion and the experience of the consumer public. Another suitable use for trend reports as an aid to communication refers to speaking to a public unaware of the *bureaux de style*, for example, commercial representatives. Extern communication aided by trends functions, then, not as arguments evoking the name of legitimate trend agencies, but regarding the brand positioning and the communication with the customers. Trends often help brands to communicate the story of their collection and products, helping to sell the collection.

Figure 75 Summary map of the code trend reports as means of communication



Source: Author

5.2.1.6 Use of trend reports

Firstly, it is needed to question how different types of fashion brands relate and adopt fashion trends. As expected and as the research conducted in Germany also showed, authorial designers are mostly uninterested in trends, which become irrelevant for their creative processes. Commercially driven and fast-fashion brands follow, in bigger

or lower degrees, fashion trends conveyed by *bureaux de style*. Alphorria⁶⁴ is the only commercial company not to subscribe to WGSN - the marketing director decided to cancel the subscription to WGSN since designers would only access the platform right before setting up a presentation.

The discourse of using trend reports was less timid than in Germany, where companies would claim to subscribe but not use fashion trend information. In Brazil, designers willing to speak openly on their practices of trend adoption mentioned clearly the fact that not following certain trends would be to forego profit. Besides the aforementioned use of trend reports for intern and extern communication, there are another three main usages for trends and trend reports.

Bureaux de style are affirmed to provide a comprehensive delivery as a manner of widening their utility by offering both general content for [1] inspiration and "chewed" material for [2] product application, which comprised the second possible use for trend reports. The use for [1] inspiration is the most often mentioned. The [2] application of trends, as previously stated, requires the adaptation for the brand, target consumers, and users. As reinforced throughout this analysis, trends are often applied to products—especially regarding statement pieces – as a marketing strategy. Lastly, there is the use for [3] ratification. Despite designers affirming the possibility of designing without trend information edited by the *bureaux de style*, trend reports provide designers the confirmation that they believe they need.

Figure 76 Summary map of the code use of trend reports



Source: Author

5.2.1.7 Commercial factor

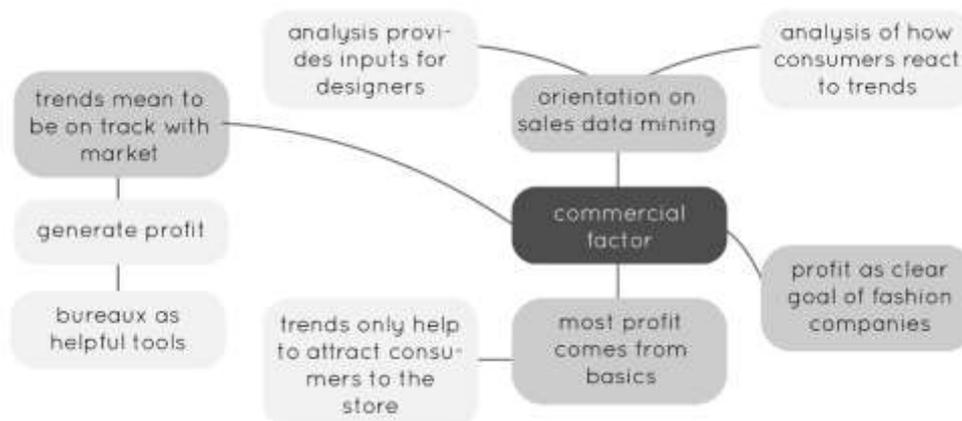
The commercial factor is a central topic in the field of fashion. Sales data mining orients design in the Brazilian context as well. Many design decisions are based on previous sales and consumer preferences outline by a specific sector of the company

⁶⁴See in the previous topic, *Communication*, the case of the WGSN subscription cancellation by company Alphorria.

responsible for sales analysis. These employees usually provide weekly reports on specific products and provide input for designers. The data also serves as a relevant parameter for the consumers' adoption of fashion trends and styles, and fast producing companies manage to gradually insert trend pieces throughout a collection. Brazilian designers seemed not to be overly concerned with the fact that they design for companies that have profit as a clear goal.

The adoption of fashion trends in relation to a commercial response has two main perspectives. The first relates to keeping the pace and corresponding with the market in terms of sales and profit. From this perspective, fashion trends reports are helpful tools for commerciality. WGSN is affirmed to be better than other *bureaux de style* for being commercial and market-driven. The second perspective concerns the fact that many designers affirm that they make most of their profit from basic and traditional items and have trends as an also rentable strategy to sell desire and fashion belonging, attracting consumers into stores due to the less ordinary items. To adopt trends is also an important commercial strategy, since data mining reports only provide patterns grounded on the past, and trends manage to provide a glimpse of a possible future desire of consumers.

Figure 77 Summary map of the code commercial factor

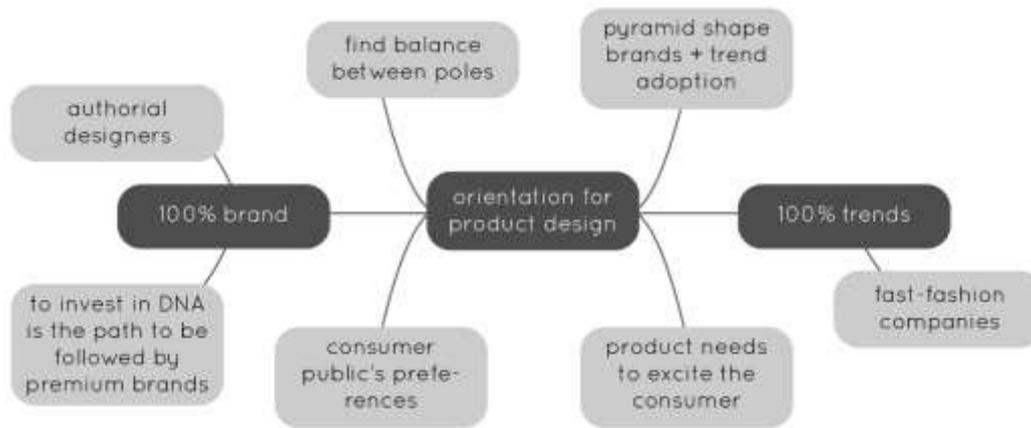


Source: Author

5.2.1.8 Orientation for product design

The analysis of companies' orientation for product design also had two extreme driving poles. One of them implies an orientation 100% directed by trends, and the other an orientation 100% directed by the brand DNA. Authorial designers occupy the full-brand-directed pole, whereas fast fashion companies relate more to the other extreme. Commercial brands are situated in between the two poles, depending on their positioning. The naming of DNA was once again strongly referenced by various companies, which present the concern of being faithful to it. Among designers, there is the agreement that investing in brand identity is the path to be followed by local premium brands.

Figure 78 Summary map of the code orientation for product design



Source: Author

There seems to be a visual image similar to Kapferer & Bastien’s brand pyramid regarding the type of brands in the fashion market (Figure 79). The companies that are on the base of the pyramid are the ones more likely to apply trends without reworks, especially operated by fast-fashion chains. Other commercial brands search for the perfect balance between showing update and maintaining their special public. Depending on the degree to which companies are more or less commercially driven, they would operate a more solid selection of trends and choose to give up trends. Despite changes, a client needs to identify with a brand’s product. In general, companies give the impression to focus on pleasing their clients as a way of assuring commercial success among their already seduced audience. For Edson Matsuo, creative director of Melissa, if a product does not “touch” the customer, it is not a valid fashion trend.

Figure 79 The pyramid brand and business model in the luxury market



Source: Kapferer & Bastien (2012, p.70)

5.2.1.9 Security

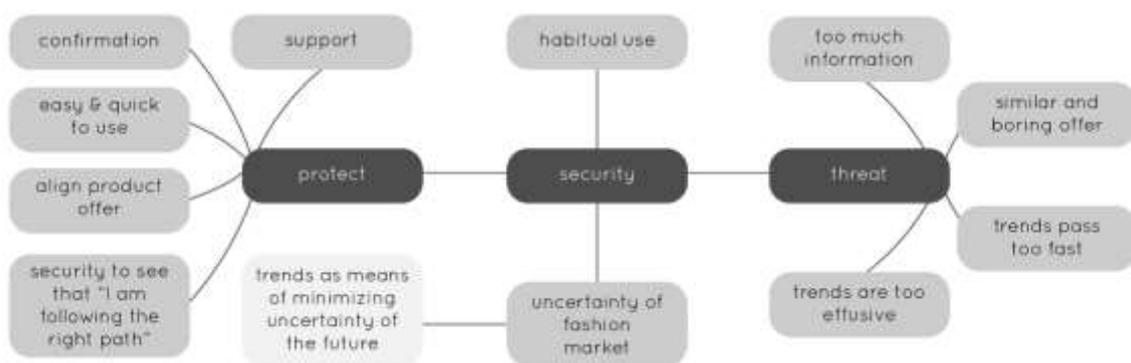
The fashion market operates on uncertainty. Despite the minimization of production time and the possibility to react to databased sales reports, safety remains a central topic. In this context, trends are also seen dually: as both threatening and

protecting. Foremost, many companies affirm that trends serve as a support, as crutches or as handrail for design and decision-making. As trends deal with the forthcoming, the access to reports is a manner of easing the uncertainties of future market demand. A mentioned benefit in subscribing to *bureaux de style* is the safety in knowing to which direction the industry is going. The commercial fashion companies, despite the creative and innovative drive of the field, are in fact traditional in relation to risking. They tend to not dare before “making sure that a product or trend will be well accepted”.

Otherwise, to rely deliberately on trend reports is also considered risky. Trends would then be threatening when adopted in a high proportion, or not properly revised to the public. In these and other cases, trends imply a massified and boring offer. The quantity of trend information available in the portals and trend books does not help designers: having options to choose from causes difficulties and confusion for designers, making it complicated to format the collection based on so many different possibilities.

The available content comprised online is comprehensive and results from the combination of the work of several experts, and designers affirm their inability to conduct such task along with their main activity: to create. Nonetheless, the available information is more than a designer could possibly apply, as most designers affirm to be impossible to deplete the whole content. Assuring that they could design without the aid of trend reports and portals, none of the designers who have access to the trend reports would voluntarily give up the service. According to one of the interviewees—and reinforcing the hypothesis raised during the investigations—the use of such *bureaux* is habitual. Designers are accustomed to being able to rely on the confirmation and supposed security offered by the *bureaux de style*, seeming unlikely to disengage from them.

Figure 80 Summary map of the code security



Source: Author

5.2.1.10 Judgment of trend reports

Brazilian companies are more positive when considering the validity and importance of trend forecasts for themselves, in opposition to German companies, which presented an inclination to consider trends important only for the functioning of the fashion industry. Brazilian interviewees consider trend reports important to all company’s sectors, from design to marketing. Concerning information collected and edited by a large group of specialists, designers find portals an easy and practical tool.

More generally in the industry, the volume of statement in favor of trends vastly outcomes those against them. The less amicable to trends see them as “what everyone will do”, being responsible for the uninteresting offer in the fashion market. Alternatively, reports serve positively to designers, performing an important role and service in the fashion industry and consolidating themselves as a competent tool.

The limits of the role of trend forecasting are, however, visible. Although some designers still find *bureaux de style* important to the fashion business, some no longer consider them the main guidelines to be followed. The recent and ongoing changes in the sector will most likely affect those agencies. The free access to online content and the reduction in the in flight tickets prices fostered companies to conduct their own focused trend forecasting researches. Investing in other sources of research and traveling, counting on trend advisors, and stating that they can achieve a *bureaux de style*-like result without having to bear the cost of their signature, it seems intriguing that fashion companies in both countries remain so loyal to institutionalized expertise.

Figure 81 Summary map of the code judgment of trend reports



Source: Author

5.3 PERCEPTION OF FASHION TREND REPORTS BY COMPANIES IN GERMANY AND BRAZIL

During the last pages, an effort was made to analyze the role of the *bureaux de style* in the context of what Kawamura (op. cit.) entitles *fashion system*. Focus was given to understanding the functions, uses, and strategies of *bureaux de style* in relation to fashion design companies in Brazil and in Germany. The latter involved companies that have a significant role in the German fashion market, mostly composed of European brands. Theoretical surveys and applied interviews were undertaken with the objective of better understanding the agency of fashion designers in relation to the fashion trends edited, published, and marketed by the renowned and legitimized *bureaux de style*.

The collected material was analyzed according to the research methodology and approach named Grounded Theory, which postulates the data as the origin of the research problem and its fundamental basis for analysis and interpretation. Therefore,

the analysis was conducted in order to: [1] identify if fashion companies buy fashion trend information provided by *bureaux de style*, and whether they apply such information; [2] understand which aspects of fashion trend reports are considered positive and which are considered negative by fashion companies; and [3] recognize what is the general perception of the importance and validity of fashion trends and of *bureaux de style* for the fashion industry in general, and specifically for each of the companies interviewed in both fields of research.

In the German context, nine of 12 fashion companies buy fashion trend reports or subscribe to fashion trend portals. The three companies that do not subscribe to any kind of service from a *bureau of style* are the authorial designers Dorothee Schumacher and Stephan Schneider, and the sustainable brand Hessnatur. All respondents consider on some level that *bureaux de style* are important to fashion companies. However, none of them has clearly stated that they make use of and apply these reports on their creations. The main arguments given for not adopting fashion trends were the brand and other orbital themes, such as heritage, history, DNA, brand signature, etc.; suggesting that individual style is of far greater importance than fashion trends.

In Brazil, the use of fashion trend reports of all kinds was communicated more openly. In addition to all the authorial designers (Lenny Niemeyer, Giuliana Romanno, Lui larochescki and Isabela Capeto), the womenswear premium brand Alphorria also does not subscribe to nor purchase any kind of fashion trend service edited by *bureaux de style*. Therefore, seven companies subscribe and use—to a greater or lesser degree and in particular ways—these types of fashion trend information. This shows that, similarly to Germany, the vast majority of commercial brands in Brazil (seven out of eight) still invest financially in subscribing to fashion trend services. The online portal WGSN is the first choice of designers and directors, emerging as the most efficient and assertive tool.

The German companies that invest in fashion trend reports from *bureaux de style* are the authorial designer Ilse Stammberger, and the commercial brands Hugo Boss, Adidas, Seidensticker, Windsor, Mustang Jeans, Tom Tailor, Tommy Hilfiger, and Fond of Bags.

In Brazil, only commercial brands acquire fashion trends reports from renowned *bureaux de style*: the brands Riachuelo, Happy, Dudalina, MOB, Melissa, TNG, and Fila. In total, out of the 24 fashion companies that had their designers or directors interviewed for this work, seven refer to the companies of authorial designers and 17 refer to the commercial companies of different segments. Out of the seven independent designers, only one acquires trend research services edited by a *bureau de style*, which is the magazine View. In the case of authorial designers, then, the consumption rate of trend reports is significantly low, less than 15%. Nevertheless, in the case of commercial brands, 22 out of the 24 companies make this type of investment, which corresponds to more than 90 percent of the sample (Figure 82). These data demonstrate the inversion of proportion in the subscription to fashion trend reports by fashion authorial designers—with minimal adherence—and by commercial brands—with maximum adherence.

Figure 82 Proportion of trend report purchase by authorial designers and by commercial brands



Source: Author

Thus, fashion trend reports maintain a strong presence in fashion companies, especially in the commercial segment. However, they are generally avoided by authorial designers, who invest in their personal style and in inspirations from the artistic universe as input for the creation of their fashion products. Commercial brand designers deal in different ways with the information conveyed by *bureaux de style*. There seems to be, on the part of the designers and directors in both contexts, a predisposition to a discourse that minimizes the validity of these fashion trend reports for the application of trends in the companies for which they work. Curiously, there is no predisposition or initiative on the part of these designers to renounce these services—which would seem to be the most logical attitude, since, if the service is not used, the financial investment could be spared.

This paradox, which I call *use for non-use*, is one of the most interesting results of this doctoral research. It shows incongruities in the meaning of the term *usage* and actions of use, application, and adoption of fashion trends, which, in this sense, are understood as similar. As discussed earlier in this chapter, during the analysis and interpretation of the interviews, the statement of *non-usage* clearly raises particular connotations and associations for each designer and director. The negative aspects often related to fashion trends in general, and especially to those presented by *bureaux de style*, are well known, but became even more remarkable in the interviews.

Fashion trends were associated with the failure of many companies that have opted to follow them at the expense of investing in their brands DNAs and styles. In order to offer many options of trends, so as to serve a market of brands with diverse DNAs, many of the options given by *bureaux de style* are incompatible as expressions of a fashion company's brand and would represent the danger of making product supply unfocused. The situation of choosing one or some among many fashion trends does not necessarily diminish the risk for fashion companies, depositing in them the obligation of choice and, therefore, the responsibility for it. That is, when interviewees mentioned fashion companies that find themselves in an unfavorable situation due to the adoption

of fashion trends, the "fault" lies on the misuse of the trend by a particular fashion company, and not on the inefficiency of the *bureau de style*.

The activity of fashion trend research, although interviewees claimed to have been much larger two or three decades ago, seems to remain profitable as a business, at least in the form of digital portals, since they do not have many competitors (Petermann, op. cit.; Maillet, op. cit.). However, interviewees also frequently reported that the fashion system has undergone a massive change driven by fast fashion, with consequences still to be perceived. Until then, a more individualistic media provides ephemeral inspiration for fashion designers and consumers through image portals and applications such as Instagram, blogs, and Pinterest. At the same time, experts and gurus predict the "end of fashion as we know it" (Edelkoort, 2016, n.p.; Abnett, 2015).

Despite all the changes, the present research has shown that fashion companies in the commercial level still expressively acquire fashion trend books or subscribe to trend portals of *bureaux de style*. Even if companies state that they do not use them, it seems unlikely that reports would not be of any use, since they continue to be purchased even at high prices and are considered positive for the fashion industry in general. Therefore, it is initially identified that designers consider applying fashion trends or using fashion trend reports of *bureaux de style* as the replica of products and expressions suggested in the fashion trend communication vehicles.

The most expressive association of negativity of trend *usage* on the part of the interviewed designers falls on the fact that fashion trends are still seen as a synonymous of lack of creativity, and inability to create something particular. In this sense, the statement by the designers is somewhat revealing of the *taboo of creativity* in the fashion system. However, checking the trend portals and reading trend reports received by e-mail also consists of using information conveyed by the *bureaux de style* as a strategy to keeping updated with the fashion market. This possibility of use alone would justify the investment, although designers did not deliberately identify that this had a direct influence on their creative processes and the resulting products. Still, the practice of performing slight changes in baseline products, often in favor of giving unity to the collection, also consists of applying trends, even if timidly.

Finally, even if designers scarcely adopt the fashion trends presented by the *bureaux de style*, for them it is of the utmost importance to know what trends are available, even if it is to avoid them and make the offer of their brand more exclusive or differentiated. Obviously, this type of use expresses a sub utility, considering all the possible uses for the information disclosed—the potential reality—but that does not, by any means, constitute in the uselessness of the material. Facing all other means of support free of charge—the exhaustively cited other sources of information such as blogs, Pinterest, Instagram, streetwear research, etc—it becomes evident that, indeed, fashion companies are accustomed—dependend—to using such trend reports, which constitutes a path dependency.

Path dependency consists of “the dynamics of self-reinforcing mechanisms, which are likely to lead an organization into a lock-in” (Sydow, Schreyogg & Koch, 2009, p.691). One of the most common mechanisms that boost path dependency is coordination. This mechanism is based on the configuration of rules or routines of behavior that provide noticeable benefits and that influence the functioning of organizations. Coordination leads to efficient interaction between actors and cost reduction. It is therefore advantageous to companies that follow it. Given the benefits, a specific type of action pattern tends to be fixed. However, the power of action can be negative in situations of new challenges, for example “in cases where organizational members have recognized new challenges and set out to change their practices but failed to do so because they could not get rid of their well attuned activity sets and routines” (ibid., p.699).

Initially leading the coordination of the fashion system, the *bureaux de style* managed to create a certain dependence on fashion companies. The coordination that benefited the industrial organization of the fashion sector and, consequently, the companies that compose the sector reverberated the dependence on the anticipated information of fashion trends provided by the former coordinators of fashion. Past events are of paramount importance for future action, i.e., a historical success is the starting point for any dependence on course (ibid.). At the same time, the predictability of routines involves a sense of security, since "routine is psychologically relaxing" (Giddens, 1991, p.111).

However, traces of entrusted dependency seem to remain not only as reference to the past, but also because of the uncertainty of a safe performance. Insecurity is thus expressed both in relation to the future and in relation to ignorance. As such, the *bureaux de style* currently maintain such a historical dependence on style coordination due to the trust placed in these expert systems by both the configured expertise and the benefits initially attributed to these institutions, but with the aim of ensuring future action. Security in expert systems involves a tacit acceptance of circumstances and does not imply a necessarily passive dependence, but is influenced by experience.

In this way, it is expressly noteworthy a path dependency from the part of fashion companies, identified in the *belief of the need* for fashion trend research reports, which, in turn, is reinforced by the *bureaux de style* through their legitimation, expertise and—why not?—efficiency. The fashion system is therefore marked by the relation of *trust versus risk* proposed by Giddens (op. cit.) as a paradox of modernity, since all mechanisms of disengagement imply an attitude of trust. Based on Luhmann, the Englishman understands risk as an unintended consequence of action or decision characteristic of modernity, and which differs from the conception of unexpected results of fate or fortune. Thus, trust presupposes risky circumstances, unlike belief (op. cit.).

In modern society, danger and risk are closely related, for risk necessarily presupposes danger. One takes "calculated risk" attitudes, becoming aware of threats. In this context, trust serves to reduce or minimize the dangers to which people and institutions are subject. In all cases of risk, the acceptable level targets the virtual balance

of confidence and risk calculation, which varies in different contexts. The confidence placed by fashion companies in *bureaux de style* therefore varies among the interviewed companies. In order to organize the different modes and intensity by which fashion companies benefit from the material researched, edited, and marketed by *bureaux de style*, the model of the *levels of fashion trend reports usage* was developed.

5.4 LEVELS OF FASHION TREND REPORTS USAGE

The data collected on the *bureaux de style* and the narratives of the designers on the validity, function, and uses of fashion trend reports resulted in the systematization of levels fashion trends reports usage by fashion companies. Taking into account the context of risk and insecurity and its minimization by the confidence in expert systems, which triggered a path dependence process (Pierson, 2004), it is vital to emphasize that the use of trend research reports is aimed at minimizing the insecurity of action by designers and creatives, so that the *bureaux de style* operate as devices to maximize safety at all levels. This, then, is not just fashion, but

All business firms, save for some types of nationalized industry, and all investors, operate in an environment in which each has to outguess others in order to maximize economic returns. The uncertainties involved in investment decisions derive in some part from difficulties in anticipating extraneous events, such as technological innovations, but are also part of the nature of markets themselves. (Giddens, op. cit., p.128).

The establishment of the different levels of trend report usage resorted to the results of the coding procedures, where the subcategories *use for inspiration*, *use for application*, and *use for ratification* of the category *use of trend reports*, and the subcategories *internal communication*, *external communication*, and *argument* of the category *trends as means of communication* were inscribed. In addition, the subdivision of the *use for application* category was created, distinguishing the application of the macro trend information and the micro trend information conveyed in trend portals and books. Thus, *use of macro trends* conforms the application of influences on concepts and themes for collection and the *use of micro trends* applies the guidelines of product attributes in garments and/or accessories.

The categories were renamed in order to increase their comprehension and conciseness. Thus, the seven levels that make up the model are: [1] use for inspiration; [2] use for internal coherence; [3] use for concept application; [4] use for product application; [5] use for verification; [6] use for argumentation and; [7] use for branding. In the scheme presented hereafter, one can identify, beyond the seven levels, the moment of use of the fashion trend reports and the main objectives that designers intend to fulfill when accessing and/or applying fashion trend information edited by *bureaux de style* (Chart 7).

Chart 7 Levels of usage of trend reports from bureaux de style

level of use	occasion of use	purpose of use
inspiration 	before creation [research phase]	filter consuming and social mood; kick-start for the team's research [suggest hot-spots, interesting brands and influencers]; present the direction of the Zeitgeist; excellent source of general culture and information;
interne coherence 	before creation [research phase but may remain in other phases]	serve as a common foundation to base designs creations and decisions; offer clear references for product and for themes and stories; helpful in motivating the designer team to work on a new collection
concept application 	before creation [selection of collection theme]	overview of macro trends; present a first big direction to designers; suggestions of themes and concepts for season provide a wide poetic direction to guide designers subjectively
product application 	during creation [selection of each product attribute]	following product instructions on product attributes [colors, prints, materials, shapes and specific statement-garments]; deliver a good indication of the market's orientation and future consumer-demand predisposition
verification 	after or during creation [with possibilities of alteration]	use as parameter to select which clothing items to develop; help identify what are important trends and to assure if the company is "on the right track"; aid to align offer with the market; provide confirmation of trend or style
argumentation 	after creation [before presentation for director]	an incontestable argument for the assertiveness of a design decision; subterfuge to show that what designers are doing is reliable; identify which of the available trends they may rely on to defend their already created products; back up their design ideas and novelty choices;
branding 	after creation* [before collection communication]	help brands to communicate the story and sell the collection; position brand as fashion brand*; show awareness of the latest trends*; occupy windows and displays*; feature advertising campaigns*

* in some cases, this type of use implies the use for application in product. For example, key seasonal clothing garments, cuts, prints, and colors are needed to arrange a window display or produce an advertising campaign that expresses trend awareness.

Source: Author

The first of the possible levels of use of fashion trend information—be it portals, books, magazines, etc—edited by *bureaux de style* consists of [1] use as source of inspiration. Offering information from various fonts, suggesting broad themes and tips on places to visit, artists, music, influencers, fashion brands, and designers emerging in the national and international scene, all according to the momentary *Zeitgeist*, *bureaux de style* help designers conduct their own inspirational research. In addition, the access to

all conceptual and product direction material frames a database that will serve as a thermometer for filtering and adapting trends and influences from other sources than the reports from the *bureaux de style*. For this type of usage, designers retrieve fashion trend information during the research stage, prior to the creation of the collection.

In particular, the study in Germany warned to the use of fashion trends as communication devices, which also makes it possible to consider it as a type of usage. In this context, it was evident the investment made in *bureaux de style* with the aim of creating [2] internal coherence in the design team, and in the company in general. Thus, even the authorial designer Stephan Schneider considered the possibility of subscribing to the service of his company would have larger dimensions. The use for coherence unfolds before the creation of the collection, but can remain throughout the creation and development processes. This use aims at applying fashion trend reports as a common basis for all designers and directors, providing clear references to themes and applications. Still, the trend information could be auxiliary to the excitement of the creative team, with *input* of new themes for the team's motivation.

The use of fashion trend reports [3] for application in collection concept or theme similarly occurs before the creation stage, during the research. More specifically, it precedes decision-making on the theme of the product collection. Meant for this employment, designers enjoy the general content on macro trends and the seasonal subjective and broader directions. The *bureaux de style* present suggestions of themes through images and poetic texts. Within the options, designers can choose to select one or more themes by altering or deepening them, depending on the operating mode of the design team and the brand's style. The concern to properly select and "translate" trends to the brand's style is urgent, since a trend should never be so strong as to completely change the positioning and DNA of a fashion brand—except in the case of fast fashion brands, to which the adoption of all fashion trends is characteristic.

The usage of trend reports for the [4] application in fashion products also involves the filtering step. At each stage of decision-making on specific product attributes, designers resort to fashion trend portals already during the creation phase, with the intention of collecting information and trend options for possible expressions of this attribute. The main attributes, already specified in chapter 4, are: color chart, prints, materials, shapes and cut, finishes, and key pieces for the season. The task of reviewing each of the many possible fashion trends is seen as a heavy workload for some of the designers. On the other hand, fashion trends conveyed in reports already help to reduce the wide possibility of expressions of the product, offering indications of the market's orientation and consumer demand's predisposition in a predetermined future.

The use of fashion trend reports for [5] verification happens after the creation of some or all the collection's products. On this occasion, *bureaux de style's* information is used as a parameter to select which collection items to develop and refine, as well as to help identifying the most important trends, ensuring that the company stays in line with the market. In reaction to verification, companies may [a] promptly adopt "strong" trends

in a product already developed, adapting trend aspects to the garments; [b] create and develop in short term new garments that meet the fashion trends edited by the *bureaux de style*, or yet; [c] deliberately avoid fashion trends while keeping creations unique and exclusive.

Another possible use of trend for internal communication – besides internal coherence – is its usage as a form of [6] argument between designers and directors. This usage was expressive in the Brazilian context. The necessity for reasoning arises partly due to insecurity on the part of fashion designers and partly due to the difficulty in communicating with directors and CEOs, who usually conducted professional qualification in more objective fields and, consequently, have a more focused discourse regarding the commercial performance of products. At a time when designers need to defend their ideas and style choices for a given collection—usually after creation—they turn to trend books and portals in order to select justifications and "proofs" that what they have decided to create can be sustained in the fashion market.

The fact that a trend was present in a *bureau de style's* report would be an indication that it would probably interest potential consumers and achieve good sales results. Thus, fashion companies can resort to fashion trend reports to aid external communication, by means of use [7] for branding. This type of use would more likely be applied after the creation, in the planning phase of the communication of the collection or during its insertion in retail. However, it depends directly on the use of trends applied in both [3] concept and in [4] products of a fashion collection. Therefore, the use for branding also occurs before and during creation. The purpose of this type of practice is the communication of a story in the presentation and commercialization of the collection by means of advertising campaigns, promotional materials, visual merchandising actions, etc. Investing in fashion trends also supports the positioning of brands, demarcating them as fashion brands, evidencing their trend awareness.

It is relevant to stress that companies utilize fashion trend reports in greater or lesser degree in every one of these levels and, evidently, may not adopt any level of usage. For example, the authorial designers Stephan Schneider, Dorothee Schumacher, Giuliana Romanno, Lenny Niemeyer, Lui Iarochescki, and Isabela Capeto do not use fashion trend reports in any level or intensity. In turn, the commercial brands Alphorria and Hessnatur do not subscribe to any kind of fashion trend information by *bureaux de style*. However, they maintain their interest and dedication in seeking information on fashion trends in other sources.

The other 15 brands—Adidas, Hugo Boss, Seidensticker, Windsor, Mustang Jeans, Tommy Hilfiger, Tom Tailor, Fond of Bags, Happy, MOB, TNG, Melissa, Riachuello, Dudalina, and Fila—and the authorial designer Ilse Stammberger are clients of some type of service specialized in fashion trend research and, therefore, use such information to a greater or lesser degree. Thus, to measure the level of adoption of fashion trend reports by the various fashion companies, a four-step scale was created in relation to each level. The scale comprises [0] the non-use, being assigned a value of zero; [1] a scarce use,

conferring the value one; [2] a moderate use, applying value two, and [3] an accentuated use, with the assignment of value three (Chart 8).

Chart 8 Scale for usage gradation



Font: Author

Charts 7 and 8 should be combined to best identify to which degree companies rely on fashion trend reports from *bureaux de style*, taking into consideration the referred levels of usage and the intensity of employment. However, as the different levels represent a greater or lesser influence on the creative processes of fashion designers, differentiated weight to each level should be considered. Thus, the accentuated use of trend reports for inspiration expresses a smaller degree of trend orientation than its moderate use for product application. As an effort to articulate a complete model implementation, a framework for a diagnosis interview/questionnaire was developed based on the recovered interviews and their corresponding analysis.⁶⁵

This model of levels of fashion trend reports usage has been validated and improved by experts in Brazil and in Germany. The contact with specialists occurred in November and the validation in December, in the year of 2016. For the validation, specialists from diverse activities of fashion expertise were selected, in order to achieve a vision that was simultaneously profound—due to the large experience and specialty of each auditor—and systemic—taking into account the different performances of the experts. Andrea Bisker, WGSN director for 10 years in Brazil and responsible for its insertion in the country, Carla Raimondi, Elle and InStyle fashion editor for over 15 years also in Brazil, and Martina Glomb, professor of fashion at Hannover Hochschule and well connected in the fashion industry and education, validated this research by acting as examiners of the model.⁶⁶ All experts referenced the urgent need for research on the topics of fashion trend report reliance, dependency on *bureaux de style* and creativity and innovation in fashion.

⁶⁵ The developed framework for a diagnosis interview/questionnaire comprises Attachment VIII.

⁶⁶ Attachment IX presents the validation interview's script.

6. FINAL CONSIDERATIONS

This Ph.D. dissertation in design deals with the immaterial agency of fashion designers from an approach of the Human Sciences, more specifically from Sociology and Anthropology. This does not mean, however, that this work is circumscribed to the field of design. The boundaries that delimit the areas of knowledge are merely fictitious. In fact, it would be naive to believe that there are disciplinary boundaries. They function like the imaginary line drawn by the Treaty of Tordesillas, which supposedly crossed the globe vertically. Even if they existed, such borders would not consist of fixed and rigid separations. They are not barriers. Conversely, they constitute a place of exchange, and it would be foolish to imagine that influences accrue from one side alone.

The choice of an approach mostly based on Human Sciences, but with a subject and objectives that clearly attend to the field of design, as Applied Social Science, demonstrates that this investigation is located on the threshold, and overcomes the boundaries of both areas. It is not limited by either. It is not located inside nor outside. In this abstract space, once again I appeal to the Roman deity Janus, who presides over passages, transitions, doors and portals. Responsible for beginnings and ends, he reigns over movements, over changes and over time.

The reference to Janus at the beginning of this dissertation seemed appropriate for its diversity of references, in addition to the above mentioned. The most evident of them is the fact that Janus presides over doors and portals – just like those created by the *bureaux de style* for the selected diffusion of their fashion trends. Nevertheless, the relationship with past and future – which directly expresses the invented tradition of *bureaux de style*, and the predictions of the forthcoming that these “fortunetellers” of the fashion industry perform – is easily recognized in both sides of Janus.

In this work, Janus is also invoked as the ultimate expression of the dualism of all things. Just as movement and change are interconnected, Janus expresses this dual nature, which is symbolized by his two faces. This duality also marked Roman coins, with Janus's faces presented on either side of a coin. The duality “insecurity and dependence” seems to be highly expressive of the relationship between *bureaux de style* and fashion designers. Moreover, the entrusted dependency refers to a successful past of security, while insecurity is expressed in relation to the future – more specifically to its unfamiliarity and ignorance.

Just like the faces of Janus, past and future are, therefore, both sides of the same coin. The dual relationship between past and future. In the case of the subject of the research here presented, the maintenance of a historical – although recent – dependence on the coordination of the fashion chain implies the establishment of trust in *bureaux de style* in order to ensure the success of future actions. Glimpsing the past and the future, Janus was the one who knew everything: what happened and what was going to happen. As George Orwell's celebrated phrase states, “he who controls the past controls the future; he who controls the present, controls the past.” Creating a tradition for themselves, the *bureaux de style* invest in a discourse of insecurity and threat, promising

means of minimizing or nullifying the threat in the near future. They act as pyromaniac firefighters.

The main issue that drove the realization of this work was a curiosity to understand how fashion trend forecasting companies – the *bureaux de style* – remain sovereign in the expertise of fashion trend research. Each of the efforts undertaken for this purpose, organized for its understanding as chapters, has generated specific results and contributions to the field of design knowledge, especially to the field of fashion design.

The first chapter describes the fashion system from the perspective of Professor Yuniya Kawamura, by understanding it as an institutionalized system that involves actors and activities, which create and perpetuate the culture and ideology of fashion. The system therefore involves, in addition to material goods commonly referred to as fashion products, knowledge flowing through and connecting the material and conceptual productive chain of fashion. Fashion has one of the longest chains of material production – from yarn spinning to the commercialization of products – and conceptually, it involves everyone from technology researchers to a specific and well-established media.

Not only the organization of the production chain and the entire fashion system, but mainly the existence of a fashion calendar that orders the deadlines and deliveries of the entire industry, reveal several *lock-ins* in fashion and the propensity that this industry, as well as others, has for path dependencies due to coordination. This is because the area is complex and operates under the logic of constant betting, which makes it highly unstable. Nonetheless, the fashion system has undergone changes mainly in relation to the calendar – which has been revised by fast-fashion, the *see-now-buy-now* system, and runway shows and collections that no longer necessarily refer to seasons or genres. Even in the face of changes, several of the processes that date from the industrialization of the sector in the 1960s are still maintained.

These along with other alterations evidently have an effect on the agency of *bureaux de style*. Considering the use of sales data as one of the main parameters for the planning of new collections, fashion trend research agencies – *bureaux de style* – have had to expand their action scopes, offering services for collecting and analyzing sales data, and applying such information in future collections. The access to sales data, as seen, enables *bureaux de style* not only to take on the expertise of its "best use", but also to aggregate the data from many customer companies and combine it to have a substantial overview of what the fashion market purchases.

These companies that dedicate themselves to the research, edition and commercialization of fashion trends mostly act with an emphasis on two types of trends. Macro trends are durable trends that express latent changes in sociocultural and psychological aspects. In turn, micro trends consist of shorter duration and impact tendencies that are more easily perceived, since they aesthetically express macro trends. In the field of fashion, micro trends are usually presented by *bureaux de style* as

guidelines for product application, and make direct reference to the attributes of fashion products, such as: colors, patterns, materials, shapes, silhouettes, etc.

Fashion products and trends, though, involve more than material aspects of clothing. They involve all the associations and symbolic content related to the fashion universe. In addition to the ideals of proportion, elegance, sophistication, boldness, innovation, modernity, among others, there is still the sphere of symbolic associations that refer to the products' brands. This sphere also implies the degree of orientation to fashion trends – which is often recognized in the design of the garments. The vast majority of companies are market oriented and face challenges in finding the ideal degree between trend and normality in the supply of their fashion products and collections.

This duality is perceived in the logic of building a lasting brand identity versus adopting volatile fashion trends – expressed by the interviewed designers as dichotomous. Dialectics seems to be a more fortuitous path to follow. Completely disregarding fashion trends leaves brands obsolete, lacking an orientation for fashion and the market, and holding them back in the past. On the other hand, blindly following all the available fashion trends would be to neglect the history of the company, and to give up customer identification and the offering of a curation of trends and products from a filtering performed by the style that the brand proposes for itself.

As a strategy to attend to as many brand positionings as possible and to multiply possible customers, *bureaux de style* have expanded their supply of fashion trends. At the same time, designers are no longer required to follow the orders of the *bureaux de style*. The experts now give brands the option – or obligation – of choice. *Bureaux de style* promise to provide intelligence, but they provide information. They require intelligence on the part of the fashion designers and creative team, who must operate a selection among the numerous options. *Intellegere*, from Latin, literally means to choose between. Intelligence consists, therefore, in making good choices. Perhaps that is the reason why it is clear to most designers that fashion trend reports are not bad in an absolute sense, but can be misused. In this logic, the *bureaux de style* remain able to deal with fashion trends, shifting a possible debility to the enjoyment of fashion trends, and passing it on to designers.

Institutionalizing the prognosis of fashion trends, *bureaux de style* play a central role in the organization of the fashion industry until today. Considered to be fundamental by fashion designers and entrepreneurs, there is a continuing belief that designing and developing collections without the help of these experts would be tantamount to sales failure. In view of the availability of online information, the cheapness of ticket prices, and the possibility of commercial analysis such as data mining, among other factors, it seems curious that fashion designers submit themselves to a greater or lesser extent to the influence of these *bureaux de style* – or at least maintain them as sovereign, even if disobeying their orders.

Both the documentary and the empirical research have indicated trust in *bureaux de style* as expert systems in unraveling the future of fashion. As a means of establishing

their expertise, *bureaux de style* use various communication strategies in order to incite a fear of the unknown, and to increase public trust in themselves. For example, they offer fashion trends as "tools", but they do not actually offer tools for trends to be researched by fashion companies themselves. The "workshops" of WGSN and Trend Union consist of lectures that present fashion trends identified by the team of experts, never teaching designers how to work like them. The Promostyl and Peclers "workshops" teach designers how best to use the trend books and color charts developed by them; improving the performance of the relationship between the fashion company and the *bureau de style*, but not promoting independence.

Clearly, *bureaux de style* have no interest in losing the dependency that fashion companies have on their services. However, on the part of fashion designers there is a discourse strongly based on the "uselessness" of fashion trend reports. It has, on the other hand, become clear that the manner by which fashion designers deal with the information conveyed by the *bureaux de style* also consists of modes of use, or, as I defended in the proposed model, levels of usage. I believe that one of the most evident results of the conducted interviews was the high percentage of subscription to fashion trends services by fashion companies in the commercial segment; i.e., not by authorial designer brands.

So, even if fashion designers do not often adopt fashion trends, it is imperative for all of them to have this type of material available. This is evidenced by the fact that more than fashion companies, fashion designers are accustomed to having this information accessible for their creative processes. Even if they consider that they do not use the information presented in portals and books, they use their existence in various ways – all of them grounded on the fundamental basis of insecurity. Fashion designers enjoy the expertise of fashion trend research as a safe haven, as a handrail, by no means giving up its availability. As stated, the use of these fashion trend reports constitutes a persistence, a path dependence.

Such dependence was established historically, from the coordination of the fashion industry during the 1960s, and benefited the organization of the fashion sector and companies of this sector. Coordination as a driving force for path dependency implies that past events are of paramount importance for future action – in this case, for trust in the future. Due to the experience, legitimacy, expertise and efficiency of *bureaux de style*, fashion companies – but more specifically fashion designers – believe in the need for access to the trends predicted by the experts of *bureaux de style*. Part of that belief also comes from the general insecurity of the fashion system.

Specifically related to the anticipated planning of the offer put to consumption in the market months in advance, it is remarkable that fashion companies deal with the risk. With the development of the industrialization of the production of fashionable consumer goods, there was a distancing of time and space, and relations were mediated by expert systems, each with its own expertise. The division of labor and the sequence and operationalization of production created the much-cited fashion calendar, which

systematizes the various stages of the production process and the anticipation with which it must take place, coordinating the fashion production chain. The risk of producing a supply disconnected from future demand faced the need to create one more expertise, which functioned as a strategy to guide present performance to guarantee a desirable future result.

The whole fashion system is, therefore, marked by the relationship of safety and risk, which is characteristic of modernity and is an effect of the disembedding processes proposed by Anthony Giddens. Trust is a way to minimize the sensation of danger to which people and institutions are subject. The risks are not limited to occurred damages. They operate to a greater degree in regard of an imminent future (Beck, op. cit.). Thus, they necessarily pertain to anticipation, planning, imminence. Since the argument of risk inhabits “threats projected in the future”, such risk is caused or can be avoided by present action (ibid., p.39-40). The concept of risk therefore involves anticipated knowledge for the planning of the future.

On the future, Giddens notes that

The future is regarded as essentially open, yet as counterfactually conditional upon courses of action undertaken with future possibilities in mind. This is a fundamental aspect of the time-space "stretch" which conditions of modernity make both possible and necessary. "Futurology"-the charting of possible/likely/available futures-becomes more important than charting out the past. Each of the types of disembedding mechanism mentioned previously presumes a future orientation of this sort (Giddens, 1996, pp.50-51).

I fully acknowledge that the doctoral study that I developed and presented here consists of a comparative – and not a global – study. The research fields of this thesis, Germany and Brazil, consist of two countries with disparate socioeconomic and cultural specificities. Therefore, it was not the purpose of the work to recommend a universalized scheme – a formal scheme, as postulated by Grounded Theory – for the themes under study. Both contexts, even presenting similar results, do not consist of and were never perceived as similar or as representative of the global scenario of the fashion system. As recognized countries in the textile tradition, but with a certain neutrality towards major world fashion centers – such as France and Italy – the countries that composed the sample comprise only a portion of the global fashion scene.

The interviews conducted for this doctoral dissertation sought to adapt a qualitative research to the interviewed companies and actors – never in a quantitative manner, as a poll or questionnaire survey. The selection of 12 companies in each of the scenarios, even if opportunistic, followed specific parameters. Interviews were firstly analyzed and interpreted separately and in detail, relating to the specificities of the fashion designer/director, and of the company. In a posterior stage of the research, the interviews were analyzed conjointly.

Some of the gaps left open by this research point to opportunities for future research, and can be ascertained by those willing to do so. As a way to improve the model of levels of fashion trend reports usage, it is possible to indicate tools or methods for fashion trend research and product developments to each of the seven levels of usage.

This research and its resulting model can evidently also be replicated in other scenarios, contributing to a broader understanding of the use of fashion trend reports of *bureaux de style* by designers from commercial brands in other countries and continents, since the *bureaux de style* act globally.

The relationship between fashion trend forecasting and globalization became especially significant during the documentary research on the main *bureaux of style*. All of them claim to conduct research across the globe, with several of them having offices scattered throughout Europe, the Americas and Asia. However, the selection of key cities for trend investigation itself seems to be representative of the historical process of centralizing fashion and trend forecasting expertise, since most of the *bureaux de style* are located in the northern hemisphere. With the high impact of globalization processes, the *bureaux de style* also listed some host cities off the European and American routes. However, it is still correct to consider that much of the fashion industry around the world is fueled by data that is collected and filtered from the reality of three countries: France, England and the United States.

The relations between fashion trend researchers – specifically the institutionalization of these actors by the *bureaux de style* – and fashion designers from countries peripheral to fashion, especially on the African continent, have occupied my thoughts. These countries seem to have been excluded from the gates guarded by Janus. With this, I am intrigued as to what bases and parameters these countries have as a reference for collecting fashion trends and creating fashion products. I wonder if, since they are not being researched by the *bureaux de style*, they subscribe – or not – to their fashion trend information. What are their agencies, what tools are available, and which experts are trusted to deal with these issues? I am not in the position to prognosticate, to guess or to invent the future, but this curiosity leads me to believe that it is a subject that will accompany me in the continuation of my academic trajectory.

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ATTACHMENTS

I. INDIVIDUAL ANALYSIS OF BUREAUX DE STYLE

I.i Promostyl

Promostyl, a pioneer in the services of fashion trend prospection and maintains its services for more than 40 (forty) years. The agency claims to be – as stated in the slogan – an international styling and trend forecasting agency for fashion, design and lifestyles. Being the oldest fashion trend consulting bureau, Promostyl invests in presenting the history and tradition, affirming to be “pioneer”, “the first ever” bureau, and having “since 1966, a visionary approach to trends in fashion, design and marketing” (Promostyl). The historic background is detailed presented, including the invention of the information media, trend books – “essential for creators and manufacturers” (ibid.).

The historic information intents to present the pioneerism of Promostyl, demonstrating that the agency not only delivers advanced information for its clients, but also makes strategic movements from the advance knowledge acquired in the research. They assert to be “the first office to grow internationally, [...] a pioneer in detecting sociocultural trends, [...]the first to announce the crossover of ecology in fashion, [...] and the first trend agency to open a branch in China” (ibid.). Due to the history of success and “longstanding expertise in forecasting”, Promostyl testifies to be “a source of inspiration for the global market”, being always in pace with the constantly developing sociocultural surroundings.

Promostyl offers trend information services by the means of trend books and consultancy. Trend books are maintained as traditional strategic tool destined to professionals from fashion and design. Nonetheless, the agency currently attends the industries of beauty, packaging, marketing and decoration and interior design as well. The service of trend books includes a material printed book and a online service that aids product development. The bureau selects four main trends each season. Those trends are further edited for creative and product application in projects of fashion and design. Promostyl edits trend books in five categories: influences, color, women, casual and lingerie.

The content of trend books includes the “identification of emerging trends and lifestyles” organized into “concepts each season” and is directed for creatives, designers and marketing directors (ibid.). Besides trend books, Promostyl offers consultancy in the fields of (1) branding – developing brand strategy, positioning and identity; (2) design – with collection & product design; (3) communication – delivering visual identity & packaging; (4) retail – by working on space design and merchandising, and; (5) creative workshops and seminars. The agency affirms that the collaborations allowed the “continuous growth” of companies and enabled them to “keep the methodology operational” (ibid.).

Facing the development of the internet, Promostyl changed its mode of fashion trends presentation in the years 2000 and 2010s. The company reviewed the supply of

products and services, expanding the range of expertise and promoting interactive information through an online portal. Services of trend review and update were created; along with the blog, online tools and space for additional information. For example, trendsetter diaries is a blog updated four times a year with news on trends of different segment, new creative directions, review of couture shows and newsletters about product innovation, art exhibitions and trade shows (ibid.).

However, despite the impetus of going digital, it is highly remarkable that Promostyl has a long and strong analogic tradition. Besides the fact that it remains producing printed books, Promostyl's website is filled with haptic stimuli. For example there is an incitement of touch by high quality images of fabrics, papers, paint, scissors, pencils, photography cameras, etc. The materiality also makes reference to the methodology and procedures. One of the exhibited images is formed by papers clipped side by side (Figure 1) and the images that supposable present the team in action exhibit manual work, materiality and touch, either in the perception of materials, or in the assembly of mood boards.

Figure 83 Materiality and haptic stimuli in Promostyl's website



Source: cropped from Promostyl (2016) available at: <http://www.promostyl.com/en/>

The team of forecasters is composed by marketing and artistic directors, stylists, journalists and designers of different national the goal to meet the clients' needs. They vaguely mention that their clientele is composed by a wide range of companies from different countries that operate locally and globally in different sectors and from the mass to the luxury market. However, Promostyl does not present the name of any company which is client of the trend books. The complete list of consulting clients cannot be disclosed due to confidentiality agreements, but some of their clients there are: Panasonic, The North Face, Reebok, BMW, Nivea, Quicksilver, Nokia, L'Oreal and the French retailer Galleries Lafayette.

Promostyl promises to help "clients to adopt the right approach in maintaining an up-to-date presence" with the target of staying ahead of the competition by reacting earlier to trends detected by the agency. Referring to their traditional books as "essential tools", they intend to define "new creative directions, new lifestyles and customer expectations" that provide their clients with inspiration based on an interdisciplinary description of the "evolution" of social-cultural manifestation. The books reportedly

provide both concrete design application directions and content to deliberate development strategies.

I.ii Peclers

Peclers claims to be the leader agency in trends, style and innovation consultancy. Founded by the forecaster Dominique Peclers and led by Eric Duchamp since 2007, the company was united with the French marketing and communication group *WPP* in the year 2003 (Peclers). In the years 1970s and 1980s, Peclers Paris has broadened its trend consultancy to the industries of fashion, textiles and home products segment. The agency's main goal is "to forecast trends, decipher future consumer aesthetic preferences and help design the most desirable products thanks to actionable style recommendations" (ibid.). For their reason, they consider their expertise and methods interactive and pragmatic, giving focus to the applicability of the delivered prognosis information.

Peclers Paris ponders that its methodology and culture have impacted the fashion world and cycles and although they affirm to work extensively with other industry sectors, there is an identifiable focus on fashion, present in the slogan "fashioning the future". The trend forecasting agency attest that "fashion is more than fashion" and should be understood on a broad level. Therefore, they attend industries in the fields of retail, beauty & cosmetics, consumer goods and electronics. They also attest their expertise and tradition as bureau de style by maintaining the name of the city Paris in their name, attesting their belonging to the city of fashion and cradle of style consulting and fashion trend research.

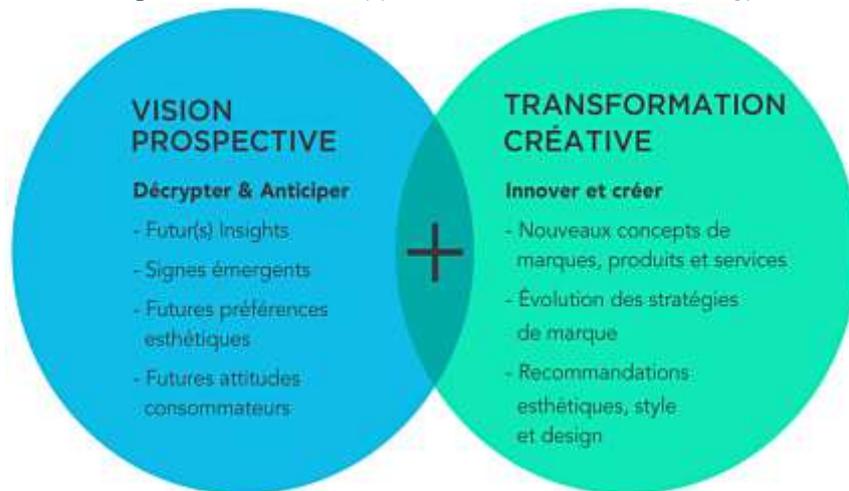
The bureau does not mention the clients, but affirms that "has been advising the most prestigious brands in the world for more than 40 years" (ibid.). Instead of deliberately offering their products and services, they suggest the company's need for them. It suggests that fashion companies require Peclers Paris' unique competence and ability as major partner and contributor to the launch of innovative products. Therefore, instead of presenting the services, the team introduces them in a circuitous way, stating that clients will be kindly given the opportunity to gain access to Peclers' methodologies.

The agency emphasizes the methodologies and expertise as strong legitimations, along with the aforementioned 40 years of tradition in trend forecasting. The history is presented along with affirmations such as that Peclers Paris is "the leading trend, style and innovation consulting agency" and that it delivers "a unique consulting offer" and has "unique future insights, semiotics and trend forecasting expertise". All features allow them to enunciate "a vision for the future" for clients to apply into "visionary ideas, new products, new services" (ibid.). Peclers' methodologies have patent registration and present the agency's name: Peclers Futur(s) Creative Innovation[®], Peclers Style Consulting[®], etc.

The methodologies are applied not only for the research and communication of fashion trends in trend books, but also as consultancy and trainings. Their expertise

comprises anticipation, innovation, inspiration and creation and the methodology combines three steps (Figure 2). The first step consists in a sociocultural analysis, where they claim to “decipher emerging consumption, social cultural and aesthetic signs”. The following second step implies the identification of opportunity fields and branches, where Peclers locates “new consumer needs and desires that define future challenges and innovation territories”. Finally, in the recommendation stage consist in the delineation of “new actionable creative concepts” that should allow Peclers’ clients to innovate (ibid.).

Figure 84 Peclers Futur(s) Creative Innovation Methodology



Source: Peclers Paris (2016) <http://www.peclersparis.com/en/peclersparis/expertise/how-we-work>

The Peclers’ team of experts offers consultancy in the fields of [a] trends and future insights; [b] brand and style strategy; [c] product innovation; and [d] seasonal product development (ibid.). The extension of the offered services - in addition to the traditional trend books - shows the new focus on creative direction through product development and brand strategies operated not only by Peclers but by the other bureaux. The guided application of trend researches, by some means, marks the emphasis on product design and on brand style instead of on an obsolete emphasis on explicit fashion trends. Consultancy is given in different field and costs vary according to projects. The trainings are divided in modules and costs start at 8500 € per company (ibid.).

Another strategy to entice clients – not exclusive but noteworthy of Peclers Paris – is the incitement of fear and insecurity. With the description with the current times as forming a “demanding context” of “strained competitive atmosphere” where companies face “the continuous flow and overwhelming multitude of trend sources” and “it is crucial” for companies to “to be put into perspective” and “remain one step ahead of the game”. If the present seems challenging enough, the future is not painted in brighter colors. It is “ever-changing” and “difficult to decipher and anticipate” and the “emotional consumer needs are becoming increasingly complex to decrypt and articulate due to the transforming economic, sociocultural and technological environments”. The Peclers “unique expertise” would be the best to “address these challenges”, since “traditional

research techniques have shown their limitations in their ability to forecast what the triggers of consumer desire will be over the next [...] years” (ibid.).

The traditional fashion trend forecasting company, therefore, affirms its supremacy and excellence in relation to others, being the most apt to deliver the solutions for the so-presented problems and challenges. If the present and the future seem frightful and fearsome, Peclers Paris is kindly available for assuring security to fashion companies. That, by more than presenting what the future will be like, by ensuring that companies meet the future values, through the guidance in consulting’s and trainings. If they can show that they have successful clients who apply trends properly, the possibility of error is not in the trends conveyed by them, but in the [wrong] way some companies apply the trends they deciphered.

I.iii Carlin Creative Bureau

Also among the pioneers, *Carlin* started its activities already in the 1940s. Transformed into a group in 1991, *Carlin* Creative Trend Bureau is now part of a “creative ecosystem” that achieved high reputation due to its cross-culture business that enclosures creation, marketing and communication (Carlin Creative, 2016). Also as a legitimization strategy, they invest in their history presenting a timeline that dates back from 1937 with in Fred Carlin’s fabric consulting and trading. They consider the textile samples books as the primitive form of trend books. The textile consulting bureau dates from 1947. Along with the historic background, the bureau exhibits its current competences: trend forecasting and consulting, trend book editing, collection design, trend forums, workshops and seminars, fashion production (runway shows, photo shoots and fashion films).

Its most traditional métier are the fashion trend books; as the company itself states, “trend books publishing is in our DNA since 1947” (ibid.). *Carlin* Creative launches 12 trend books in digital and printed version during the year. They are assorted in the fields of beauty, color, decoration, innovations and services, lingerie, prêt-à-porter and sport. They consider the trend books to be “passports to explore creativity”, working and means of inspiration.

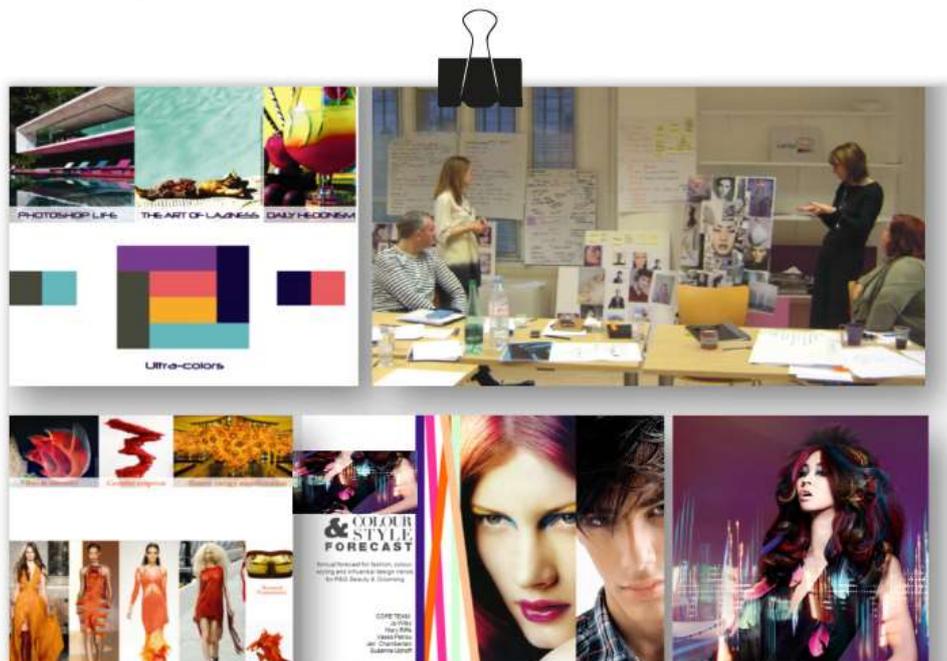
The color trend book is the most renowned and overall, color is an important focus of the bureau, since historically *Carlin* is the first color forecasting bureau, launched in 1958 (ibid.). When they affirm that “color management is strategic to your business” (ibid.), they reinforce the need for their expertise inciting the danger of unknowing the future of color preference. The color trend book attends clients from the fashion, beauty, lingerie, automobile and electronic industries with colors ready to apply. The book offers 50 exclusive colors within 4 diverse themes every season. Besides offering color charts and harmonies for download, they provide a “filorama” – samples of colors in cotton for better color perception. That marks the traditional expertise in the field of textile, despite the branch out to the fields of technology and motoring.

Trend books anticipate the fashion seasons from 18 to 24 months. The product focused trend books are in the fashion, beauty, interior design and color, as aforementioned. There are also more conceptual trend books that present specific themes for the two traditional fashion seasons. The trend books Temptation and Impulsion offer four main trends with various pattern graphics and color charts ready for download in Adobe Illustrator and Photoshop format. In the strategic direction, they offer “graphic” storytelling of trends, marketing speech and color strategy.

The bureau offers style and strategic counseling for fashion, beauty (cosmetic) and interior design and for other industries. Besides fashion, cosmetic and decoration, they also provide strategic guidance for companies in the general “service” segment, including the topics of transportation, leisure, urbanism, luxury, retail, environment, care, etc. The consultation usually attends strategic development, like projects in brand positioning, market analysis, consumer behavior, scenario anticipation, product concept, identity and style, packaging, merchandising and concept stores, working on major color families respecting the brand’s DNA. Carlin presents short testimonials, case studies (Figure 3) and the name of the most important clients, like Samsung, LG, Heimtextil, P & G, Yves Rocher, Trend it up!, Wella, La Poste, BASF, Hyundai, Swatch, Elle, Intersport, and others.

Each digital books cost from 980 € and each print trend book cost 1600 €. The financial investment of consultation is not available at the website and needs to be directly accorded with the group. The services are provided by 50 collaborators, that conduct over 100 annual consulting’s. They have agents around the globe, but the main contact, vast list of clients and the website content seem to preserve the centrality of France.

Figure 85 Case study of Carlin’s consulting for Procter and Gamble



Font: Carlin http://carlin-creative.com/case_study-proctergamble/?preview_id=2923

Their promise is mostly saving time and creating value to the collection. With strong positive affirmations, the bureau assures to provide clients with “everything” they “need to know” and essential information. The “ultra-detailed” trend books are to be easy and practical tools, ready to use, with knowledge that fashion companies may immediately apply in their collections. The tools are, therefore, both inspirational and pragmatic. The rich presented content was decoded and filtered by their experts in order to their clients receive enriched and organized information, which is also easy to access. In their words, the strategic inspiration also provides the service of connecting the production chain, giving direct access to suppliers and to designers, sites and videos; by providing specific information on technical properties of fabrics and downloadable patterns and color charts.

They affirm the trend books to be “vital and digital”, reinforcing their partial-migration to digital platforms, including various visual and textual references of the adaptability to supports such as desktops, laptops, tablets and smartphones. The easy access in all the supports continuously feeds designers with inspiration and leads them to keep processing information throughout the day. Team share is also noted as a positive attribute, since the curated content creates interne coherence. The comprised “creative options” conform a “synchronized and structured publication” that provides not only long in advance information on trends, but also updates the information as the season approaches – in response to the new temporality of fashion and the volatility of fashion trends caused mainly by fast-fashion.

Being one of the most traditional bureaux de style, Carlin Creative reiterates its legacy and heritage by investing in communicating its history and by stressing the legacy and vocation in the field of trend forecasting and direction for textiles and fashion. Despite the needed migration for digital platforms, the transposition was practical and material trend books remain central to the company. With a discourse based on the reasoning of being very pragmatic and applicable, they promise assertive inspiration that will return the investments. Their methodology is presented as agile and flexible, allowing the delivery of “the right offer at the right time”.

I.iv Trend Union

Trend Union is a company mostly known by her founder’s name and identity. “Li Edelkoort has the attributed status of *oracle, trend priestess, trend-prophet, highness* or *guru*. She is always named as *the most important* or *most influential* forecaster in the world” (Petermann, 2014, p.10). The bureau clearly reinforces the crucial role of Li Edelkoort as its most important feature. The talents and accomplishments of Mrs. Edelkoort are presented in a dedicated page on the website. Not only her abilities, but also her legacy is much strengthened. It is mentioned that she created trend forum and audiovisuals, “which have remained imprinted in the minds of the textile and design

community through installations for *Première Vision* in the 1990s”; attesting that she has marked the minds of fashion professionals (Trend Union, 2016).

Not only on the topic of Li Edelkoort’s personality, but also the whole communication of the bureau invests in a less direct and pragmatic discourse. Trend Union – or Edelkoort herself – opts for a more inspirational, enchanting and subjective discourse and also for the presentation of those attributes on their services and products. Affirmations about Li’s conduct of research attest that she “constantly lives in the future” and is an “intuitive thinker” that trespassed the frontiers of fashion and design, becoming an icon. Not only the attributes of “one of the world’s most famous forecaster” are praised. Her team of forecasters and artists are claimed to be highly talented and creative, a “highly qualified team of resourceful individuals” (ibid.).

Trend Union delivers materials both in printed booklets and trend books and through seminars personally given by Li. Her seminars and speeches are known for being inspiring, lively and clear. The *Bloom* magazine is another key feature of the agency. Launched for the first time in 1998 as a reaction to lifestyles inspired by trends in botanics, it is considered “the first of its kind” (ibid.). The publication offers stimulation for various readers’ senses and imagination. Without advertisements, the reading of the magazine allows a completely immersive and captivating experience by navigating the stories and the sophisticated images (ibid.).

The bureau also launches other trend books and magazines. The trend books maintain an artsy and craftsmanship aura of fashion couture for they are hand-made in limited quantity. The books describe trends based on the most avant-garde consumer behavior in different scopes. The trend books categories are: [a] general preview; [b] color; [c] active; [d] men; [e] pattern; [f] lifestyle; and [g] architecture. Trends are presented using inspirational visuals, key color combinations, explanatory keywords and texts and samples.

The books reveal the opportunities for design, creation and innovation in the future base on lifestyles and consumer behavior. In the main, the bureau created in Paris in 1991 works as a creative-artistic-operational think-tank and has expertise of trend forecasting and market study. They work by identifying and analyzing future consumer attitudes, lifestyles and economy trends. The forecasting agency considers the books to be “evermore inspiring with visually stunning images to feed all your creative work” (ibid.).

As other *bureaux* also do, Trend Union brags about its services, achievements, superiority, expertise and pioneering repeatedly. Being remarkable the recognizable figure of Edelkoort and the particularity of her work, which is highly intuitive and fluid, Trend Union relies on more unique characteristics to lure clients. The research approach is proudly presented as original, rhythmic, sensitive, humanistic, holistic, audacious and avant-guard. The leader is considered an influential, an icon, a guru. The seminars, unforgettable. The publications, as having reset the publishing medium, “acting as inspirational style bible that have become ideograms of their time” (ibid.).

I.v Trends Top

Trend stop is a recently launched trend bureau, in 2002, entitled “specialist trend agency”. Just as Trend Union – more than the naming similarity – the company relies mainly upon the figure of the creator, Jaana Jättyri. As Li Edelkoort, the official presents Jaana as “a creative visionary”, legitimating her experience by affirming that she “has worked in the trend forecasting industry for almost two decades” (Trendstop, 2016a). The inspiring figure of Mrs. Jättyri is exposed in an interview available in the website, where she stresses various aspects of her routine and personality, such as life as her main source of inspiration and the excitement of experiencing a great idea (Jättyri, 2016) – surrounding her aura with a sensitivity and predisposition to absorb the *Zeitgeist*.

However, a discernible difference is the fusion of the inspirational and romantic “guru” figure of the founder with a pragmatic and utilitarian discourse. Trendstop promises to help clients develop great products through the great execution of ideas, therefore achieving commercial success (Trendstop, 2016a). The commercial factor of trend forecasts is mentioned continuously. Percentages of missed opportunities and retail numbers are presented as convincing strategies. According to them, “you may be missing out on up to 75% of print item sales”, “85% of shoppers place color as a primary reason for why they buy a particular product” and “90% of an assessment for trying out a product is made by color alone” (ibid.).

Likewise, the assertiveness and reliability is often stressed, even on the slogan that attests “trend forecasts you can trust” (ibid.). The trust is reasoned mostly by the validation methodology, affirmed to be unique and to provide forecasts “which add confidence to commit to trends ahead of the competition” (ibid.). As appliers of the methodology are presented as expert, but friendly characterized as approachable. The Trendstop team is composed by 150 researches and 30 senior trend analysts located in London. There they focus on the main “expertise is in translating trend concepts into commercially successful products, ensuring your products and campaigns are on trend and relevant to your target consumer” (ibid.).

The trend reports curated by Trendstop not only are trustworthy and help customers achieve commercial success, but also easy to adopt, saving time and easing decision-making. The edited reports are claimed to be “clear, concise and confirmed” and to “add confidence to your seasonal color selections like never before” (ibid.). Besides saving time, reports presents the “correct” colors for the season “instantly” and effortlessly (Ibid.). With the trusted confidence of Trendstop, one of the most important designers and creative director’s activities are substituted by trend reports that the company assures to be effective and to capture the target audience. “easy-to-use trend resource, which customers say can cut their trend research time by 50% or more” (Ibid).

Trend reports are launched weekly in various themes and segments and may be purchased singly. Divided in women, men and unisex, they address themes; prints and graphics; material; color; footwear; children wear; trade shows; catwalk; accessories and apparel. Sample pages are available before purchase, which varies from US\$ 499 to US\$

895. In the page of trend report browse, Trendstop offers bespoke reports, consulting and workshops for specific companies, in case the desired information was not available in one of the reports. Some of the reports are formatted as video presentations from Trendstop's experts, presenting the various product directions and concept direct to aid collection planning.

Trendstop's expertise is also executed by consultancies. The attend the areas of Creative direction; Design development - translating trend concepts into commercial products -; Strategic range building - supporting collection planning -; and on trend communication - with curated trend communication for campaigns, public relations, social medial and retail. The consultancy attends "custom trend projects" with "hands-on assistance", reinforcing their ability of trend selection and translation into commercial products aligned with the companies' goals (ibid.).

Another information modality is Trendstop Live, referred to as trend briefings. The briefings consist in live streamed trend sessions on current relevant topics and trends. Sessions last from 30 to 60 minutes and are held by Trendstop specialists, with the possibility of interaction. Some presentations may be seen free of charge upon registration but some have the cost of US\$ 413 or US\$ 495. To access reports and briefings there is also the possibility of subscribing a membership of Trendstop. Three modalities are offer and vary on information availability: Insider, Expert and Enhance; and cost from US\$799 to US\$ 2,970 quarterly (ibid.).

Another curious strategy is the urging of threat by affirmations such as "an extremely competitive marketplace" and dependency, claiming that reports are "unmissable" and ensure the "right direction". Also as affirmative strategy, they present endorsement from customers and client companies. Trendstop validates reports and trends with consumers using a specific technique that results in reliable forecasts (Ibid.). The intern industry endorsement - by fashion companies - is presented both as testimonials on specific trend reports and by presenting highly renowned fashion companies as their clients in the homepage. As "trusted trend authority", Trendstop supports "global leaders" in the development of "successful products consistently and effectively" (Ibid.). Some of the customers are: Hugo Boss, H&M, Target, Forever 21, Geox and L'Oreal.

Trendstop asserts to be "a pioneering creative agency combining a global online trend research platform with an innovative design studio and consultancy service". Being mainly digital, it achieved success and invest most and foremost in the centralizing figure of Jaana Jättyri and in a methodology that they reinforce to be effective and assertively. The strongest reasoning for their effectivity and claimed success is the strong reference to fashion as a commercial field. References to sales' success, marketable products and the economy of time and effort concoct the pragmatic and utilitarian discourse of the most recent of the fashion trend *bureaux* analyzed.

I.vi The View

View is a magazine much referred to as trend inspiration source by designers and creatives in Europe. Its commercialization occurs in specific point of sales, as selected newspapers stands, by commercial representatives and online. The group of publications comprises the magazines Textile View, View2, ViewPoint, VIFF and PantoneView Colour Planner that attend the textile industry with the selected “must haves” (View Publications, 2016). The periodicals presents forecasts for the upcoming fashion season in the topics of colors, materials, design and styling for the segments of women, men and childrenswear. Published four times a year, View offers an “extensive and significant information source for the entire textile branch” (Mode...Information, 2016).

Textile View and other View publications is most valued due to the approach on color and the presentation of color development throughout the seasons, allowing designers and creative directors to have a good overview and comprehension of the developments in the trends of the field. Colors are organized into View’s “own but internationally coordinated themes” (ibid.). The focus of color management is expressed by early color concepts to precise color communication and exact color processing into “marketable products” (ibid.).

With the purpose of presenting “distinctive global information” on fabric and fashion trends, the team of View investigates street, retail and merchandising along with consumer behavior. The frequency of the publications allows permanent updates on already published materials, such as analyzed catwalk reports and fashion news. View aims to fulfil a gap concerning trend information, with early stage and relevant information that leads advantages and helps save time and money. They affirm to provide not only information on trends, but the most suitable tools to implement them.

Another valued attribute is the proximity to the market and effectiveness of the reports. Despite presenting conceptual and artistic inspiration imagery, Textile View is characteristic of being applicable and close to the market reality. Reports present actual and short-term trends with themes and highlights for direct application. A benchmark of the best practices and the market mood of fashion is presented in the means of “comprehensive overviews of new collections from important manufacturers” (ibid.). As traditional *cahiers de tendances*, View features “key silhouette and model sketches” with garments’ detailed description (ibid.).

Regarding expertise, View Publications claims to be the “first choice for international publications and color communication systems in the field of textile, interior, color communication and design”, being internationally leading and “the most esteemed” publication (ibid.). The employees are discretely referred to as experts, but mostly as publishers. In the institutional website they are not presented, with exception of the column Publisher’s View, which consists of a report written by the editor.

Very affordable, each Textille View magazine costs the amount of 59 euros, which adds up to a total of 236 euros of annual investment.

I.vii Deustches Modeinstitut

The Deutsches Mode Institut, German Fashion Institute, is a national organization in Germany that also offers the services of research, analysis and communication of fashion trends. The products and services of DMI address the fields of fashion and interiors and lifestyle. The office assures to execute “comprehensive development analysis” and to deliver “early trend information in the topics of colors, materials, yarns and fabrics” (Deutsches Mode Institut, 2016). DMI states that its reports and services make aware, explain background facts, summarize opinions and elucidate new developments. The highlight given to the reasoning and the context in which a trend appears goes further than regular result-focused fashion trend reports, for it drives attention to the cultural and social settings.

A legitimizing reasoning is the attempt of showing their products and services as essential. DMI affirms that its colors cards, trend books, trend letters and newsletters to “form an early and absolute necessary basis for your work”, suggesting designers could not properly create without those information sources. The professionals of DMI also crow about their “excellent” connections “with the specialist and general press” (ibid.). These connections allow them to accomplish another segment of their agency by promoting public relations. Insofar, “DMI is meeting its role of providing and promoting information, communication and cooperation within and outside the branch” (ibid.).

Expertise is affirmed by history and heritage. DMI affirms to have conquered the abilities due to years of specialization and to count on an international team of experts. It is mentioned that the team is up-to-date and always on site, but the professionals are not public displayed, only those belonging to the direction of the institute. The team’s good connections, as aforementioned, is frequently strengthened as is their effectiveness in the press and association with the German fashion field. The acclaimed specialist know-how of the institute origins form the beginning of their work already in 1927. After a short break, the institute was re-established in the 1950s by significant agents of the textile and manufacturing industry (ibid.).

DMI trend services focus on delivering information at the right time on trends backgrounds and contexts and provide inspiration for the fashion and interior industries. The delivery of comprehensive and accurate information to the branches is a result of analysis on the international developments of fashion and interior design markets and marketing. In this sense, the organization avows to provide effective support for companies’ decisions, optimally aligned with the market and the target-groups. Trend books are declared compact and the result of high-quality analysis. The content comprises commercially relevant trend themes visualized by colorful mood boards. Trends reports also present pictures, illustration and texts.

Both associated members and non-members may purchase the trend reports. For members one trend.book woman.man cost EUR 210,- each plus transportation charges. The same report costs twice as much for nonmembers. Trend information is also offered through consultancy, with exclusive and individual packages directed to the company’s

brand and public. Another service is DMIx, a color solution system for professionals of architecture, fashion and design improve the accuracy and compatibility of color by eased communication.

Despite the offered services seem to equal and even overcome consecrated *bureaux*, DMI's visual communication suggests a lack of professionalism and fashion direction. The website and the whole visual information media, from trend books to trend reports, do not preserve the same refinement, neatness, fashionable approach in the language, imagery and compositions. Graphics and photographs are overwhelming, full of information and seem amateur. The typed newsletters and reports do not follow a layout or publishing characteristics that expresses the qualities of other *bureaux* or the fashion media. In general, it can be said that DMI visually informs itself more as an association of professionals and companies of the textile and clothing branch than as an international fashion trend forecasting bureau.

I.viii Use Fashion

Use Fashion is the most representative Brazilian *bureau de style*. The bureau claims to be “the greatest online portal for research on fashion, style and consumer behavior” (UseFashion, 2014). In the year 2016, Use Fashion has restructured the manner they conduct and present fashion trend research. For that reason, Use Fashion affirms that they have “revolutionized your way to search” and that to always change is inspiration and intelligence (ibid., 2016). Also regarding the conducted changes, the new website was improved to be “more practical to work, manage and segment researches, expand horizons and understand the changes in the field trends” (ibid.).

As the name itself suggests, the portal attends deliberately fashion companies, being that the division of information reinforces the segments of clothing and fashion complements. The published content promises to address the commercial reality. For that, the team conducts deep analysis in local and global markets in different product levels and in various situations, from material and product fairs to fashion weeks and street style – “studying consumer behavior in all its complexity. They also sustain that they cater to the whole fashion production chain with two years in advance.

Still, the portal is national leader and it stresses that fact continuously. Their history is also presented by stating that the group was founded in the year 2000. Originally, Use Fashion focused on leather goods for the fashion market. In the institutional video, Use Fashion claims to be the first company in the world that identified fashion as a business. The team of over 100 employees are entitled as professionals, to strengthen the business legitimacy. The forecasting company avers that clients research with Use Fashion and not purchase the results of Use Fashion's investigations.

Among the promised benefits, the Brazilian bureau offers the rise of productivity and fomentation of research processes. Another strong argument refers to financial factors, specifically crucial to the current economic scenario in Brazil. Use Fashion would lower the costs with travels for research and inspiration. Referring to this same financial

aspect, the Brazilian bureau offer services at a “price that attends the reality of the Brazilian market” (ibid.). By affirming so, Use Fashion not only reinforces its market-grounded characteristics, but also presents itself as a much more affordable alternative for Brazilian companies, since for the local market, the devaluation of the real against the euro and the pound makes international trend *bureaux* very expensive.

As the international competitors, the Brazilian company provides inspiration, innovation and creative intelligence to the fashion supply chain. The researchers affirm to have an overview of “the whole fashion market”, and that “every link needs knowledge and information” (ibid.). Acting as coordinator, Use Fashion crosses consumer behavior information with the fashion cycle and transform trends. Overall, the promises are information, knowledge, profit and lucrativeness for the national fashion business (ibid.).

In addition to the fashion trend information Use Fashion features a picture library, analyzed content of advertising campaigns, technical drawings, product technical instructions with information materials and haberdashery, patterning and cutting, as well as consulting and training services. The access to the full Use Fashion portal per user corresponds to the annual amount of nearly seven thousand reais, dividable monthly. The company also offers the possibility to subscribe to specific content divided by the public’s gender and sector.

Regarding endorsement, the company considers to “inspire and direct thousands of brands in all fashion segments”. They present some of their client, but most of companies are not of great international nor national renowned. Among the most famous clients are the British chain C&A, the Brazilian television channel Globo, the brand of the designer Iódice, the textile group Vicunha and some shoe brands, which are located in the same state of Use Fashion’s headquarters, Jorge Bischoff and the Couromoda group.

Use Fashion also invests in fear incitation by presuming that the market “transform itself at every moment” and with assumptions such as “it is no longer enough just to follow the innovation, one needs to anticipate it” (ibid.). It makes accusations, such as, “it is not enough to have good taste”, in which not only they mitigate the value of neatness, but also assume the position of experts in opposition to supposed laymen or amateurs. Since the bureau invests in technic information of fabrics and patterns, it reinforces the need of skills and planning to perform various techniques, from textile technology and patterning to visual merchandising.

The latest update in Use Fashion’s website much improved the visual compositions that expresses the professionalism strategy. The overall amateurism was substituted by cleaner images and sleeker visual communication, much more characteristic of successful fashion communications. However, the portal maintained the information overload that is not only visually exhausting, but also cognitively overwhelming.

I.ix WGSN - Worth Global Style Network

WGSN is the current most important fashion trend forecasting bureau. Considerably younger than the traditional *bureaux de style*, WGSN was founded in 1998 by Marc and Julian Worth in London, United Kingdom (WGSN, 2014). From the year 2012, the information and service company belongs to the 4C Group and is one of the most influential companies in the field of trend research. For being the first and the most renowned trend forecasting company in the digital sphere, WGSN phagocytized concurrent. In the year 2013 they acquired the bureau *Mud Pie*, founded in 1992, and in 2014 (officially in August 4th) they united with the also concurrent *Style Sight*. Despite the so-told fusion, the name WGSN remained and the one and only visualization of Style Sight's intake was a slight alteration in the company's logo with color Orange marking the S of Style Sight, change that was undone after months.

WGSN is the current world leader in trends and predictions and they act in fashion-alike fields, such as lifestyle, interior design and retail. The company has teams distributed around the globe, including an office in South Africa, which is, as noticeable in the business of fashion trend forecasting, often excluded. WGSN offers both a general information service and a specific information service in the form of consulting, entitled Mindset. This feature consists, in their words, in an "advisory service powered by the industry's best brains" (WGSN, 2016). The consult provides customer-tailored proposals in various fields such as the strategic marketing and branding and the operational product development and trend application. They still offer the creation of workshops and exhibitions spaces in trade shows⁶⁷, just as the traditional trend installations of Li Edelkoort in *Première Vision*.

Figure 86 Fusion of the visual identities of WGSN e Style Sight



Source: cropped from WGSN (2013)

The general services include In Stock, a recently new feature that presents sales data analysis from over 12 thousand brands. The goal of this service is to offer monitoring of retail data in terms of range planning directions. Of course, the fact that WGSN offers

⁶⁷ See information on the theme park created by WGSN for the textile interior's fair in Frankfurt, Heimtextil in January 2016. *WGSN: How we created an interiors theme park at Heimtextil 2016*. Retrieved from: <<https://www.wgsn.com/blogs/wgsn-how-we-created-an-interior-theme-park-at-heimtextil-2016/>>. Accessed July 15th 2016 at 04:52 pm.

this type of service is highly expressive of the role sales-data-mining has been taking in the last years in the field of fashion, especially regarding collection planning and design. Their convincing strategies for acquiring the service is the focus on the threat of the quantity of data, which would be overwhelming and impossible to manage [“it’s impossible to get your head around it all” or “What used to be impossible can now be done in minutes”]. Another strategy is the legitimation and pretense assertiveness of numeric information to be used by designers as strategy to convince hierarchical figures like CEOs [“Use it as concrete evidence at my meeting to back up my instincts” or “Gives the confidence and intelligence to get it right”] (WGSN, 2016).

Another new feature is Style trial (WGSN, 2016). This service consists of consulting multiple possible customers with the goal of identifying product acceptance. The called “wisdom of the crowd” would identify the market share potential prior to the production or purchase of a collection, assisting directors to “ensure products are winners before they go to market (ibid.). The reasoning for the service also relies on having the unknown as threatening and promising information as the solution for market coherence, i.e., sales. The products can be judged by WGSN’s panelist in different stages and receive fast applicable feedback on design, color, price, age and size appeal within the time limit of five days. After the review of customers, the fashion company may launch the collection “with added confidence” (ibid.).

WGSN still offers events investing in the experiential awareness from customer and its role as industry’s coordinator. The event “Futures” consists in setting up different influencers and leader to discuss and – according to them – define what trends will interfere in the forthcoming months and years of the industry. They are global summits that not only offer information on trends, but also allow the different participants to build network and broaden their contact’s agendas. Considered an “immersive and inspirational event”, WGSN invites the clients to “witness the experience” of future, a show that presents “the latest trends set to impact the market” (ibid.).

The leader trend forecasting agency however maintains fashion as main expertise. Alike Trendstop, WGSN also considers itself as “the ultimate trend authority for fashion and the creative industries” (Ibid.). As offered material, reports consists in color and trend forecast with up to 2 years in advance. In the urge of providing fashion and design inspiration, WGSN not only edits reports in which they “predict the long- and near-term trends in consumer behavior, retail, marketing and business strategy”. The information should allow designers and directors to “plan the range with confidence”, supported by catwalk analysis reports, searchable images, royalty-free prints, graphics and CADs, city guides and palette builder and library. The company attends the fields of Womenswear; Menswear; Youth; Kidswear; Knitwear; Footwear; Intimates & Swim; Denim; Active; Accessories and Beauty with information on Color; Materials & Textiles and Prints & Graphics (ibid.).

WGSN does not disclose the amounts charged for their portal and services. It is known that costs vary according to the sector, the service provided and the size of the

company. As strategy garner clients, a common practice is the cheapness of the first signature. In the year of 2013, the costs of the first year's subscription was £10,000 (ten thousand pounds) for an unlimited number of users. In subsequent years, when customers were already used to and valued the service information, the annual cost only covers access for three users, being charged extra £ 500 for each additional user. In Brazil, the amounts committed in 2011 were US\$ 12,000 for access to a single user (Campos, 2013). The figures indicate the high cost that the market is willing to pay for information and knowledge related to fashion trends.

More than trends, WGSN claims the service to deliver intelligence rather than information. The main positive feature for them is the improved decision-making of fashion companies, from concept to creation. The reasoning is also very commercial focused: increase profits, operate financial growth, maximize margins, improve sell and reduce risk (WGSN, 2016, op. cit.). Aware of the industry's main challenges – communication-, WGSN assures to strengthen “collaboration and information sharing” driving companies to save time and improve productivity, by being an extern mean of generating intern coherence.

Throughout the website it is possible to identify a peremptory discourse from WGSN regarding its services. This discourse is guided by the alleged leading position and ultimate authority on trend forecasting. There also is a reinforcement argument of commercial and executive background. As a reaction to big data and sales data analysis and acknowledgment that data is used as convincing argument for chief executives and financial directors, WGSN directs to this audience with statements about time and resource savings. With statement such “over 93% of executives say that this intelligence has strongly influenced their sales, while also helping them to streamline resources”, “84% report that WGSN has helped them save money” and “9 in 10 [executives] say WGSN has given them back a half-day of time per week” (ibid.).

The CEO-driven discourse is also noticeable in numeric information and information/data volume, such as “1,300 catwalk shows and 150+ catwalk analysis”, “more than 17m images plus thousands of royalty free CADs and designs” etc. Despite the fact that the quantity of reviewed data and available information in form of trends, texts, images, prints and drawings allows companies and designers the exercise of choice –being less positivist as trend reports once were-, the information overload drastically increases complexity. This makes trends rather confusing for designers, who feel overwhelmed with so many possibilities.

WGSN discourse is also very insisting on expertise and heritage, despite the fact that the company is much younger than the traditional Peclers, Carlin and Promostyl. If there is a rhetoric reinforcement of their history and legacy. They manage to go around their less ancient tradition by combining the years of experience of their multiple collaborators [700 years] in a “world of trend expertise” (ibid.). Although young, the company appeals to the years of experience, claiming that “WGSN has been providing counsel, insight and intelligence since 1997”.

Another justification for its legitimacy, WGSN uses the argument of reliability – “Insights they can trust” and “you can trust us” – and problem solving. For example, when presenting themselves as a trend forecasting agency, they affirm that “we have a solution for you”, implying that the prospect client has problems. In the same topic they reinforce: “our consultants can prepare an expert solution”, suggesting that they not only can solve the obvious problem that the company undoubtedly has, but also they are the most apt to resolve the matter in a proficient way. They present the trend forecasting team as expert and global – “350 in 16 offices around the globe” – in order to strengthen its expert status (ibid.).

As all others, WGSN presents a part of their client list and even makes available case studies of three consultancy clients. In one of them, WGSN acknowledges the success of a clothing collection to the designer, but has chosen to present a designer’s quote that commends WGSN for providing utensils “needed” for her to accomplish her “best work” (WGSN, 2016- report). As well as all *bureaux*, WGSN by providing ready material – themes, drawings, prints and patterns- for application by designer fills the designer creating space. By deliberately presenting Candiotts’ quote: “of course, I can design without WGSN. But it’s like being a surgeon without the best technology and the best medications, why would you?” (Francine Candiott, Report WGSN), WGSN presents the desire to be considered the highest technique, for the designer could create without WGSN, but wishes to have the support of this “primorous” technology.

II. PRELIMINARY INTERVIEWS

II.i Questionnaire answered by Professor Ellen Bendt

Hochschule Niederrhein – Faculty of Textile and Clothing Technology

E-mail sent in July 5th, 2015 answered in August 9th, 2016

1) *Wie erschaffen Modeunternehmen eine Modekollektion allgemein in Deutschland?*

Kommt auf das Label und die Organisation der Supply Chain an. Der Trend geht zurück zu Produktionen im europäischen Markt, aus Zeitgründen. Neben Designteams hier in D gibt es die Zusammenarbeit mit Agenturen im Ausland, die in Absprache Kollektionsthemen vorarbeiten. Manche Firmen haben auch gar kein Design sondern nur einen „kreativen Einkauf“ und kopieren andere Label.

2) *Mit Hilfe welcher Informationen/Daten fangen Designer ein neues Kollektionsprojekt an?*

Üblicherweise Messebesuche, WGSN, Fachzeitschriften, Store-checks und die Veranstaltungen und Unterlagen des DMI-Deutschen Modeinstituts.

3) *Wie wichtig sind Modetrends heutzutage für das Erschaffen einer Modekollektion?*

Kommt auf die Art der Trends (langfristig – kurzfristig, technologisch – soziokulturell etc.?) und das Label und die Zielgruppe an.

4) *Als wie wichtig schätzen Sie die Rolle der Trendforschungsunternehmen für die Modeindustrie ein?*

Das DMI ist wichtig, Agenturen wie „Rheingold“ tragen zur Definition von soziokulturellen Trends bei, die besonders für langfristige Lifestyle-Trends wichtig sind.

5) *Haben Modeunternehmen eigene Trendforscher oder kaufen sie noch Trendreports (Tendenzberichte) von Trendforschungsunternehmen? Wie funktioniert der Prozess des Kaufens, der Anpassung und/oder der Verwendung der Trends?*

Die Auswertung von Marktzahlen und die Beobachtung des Marktes und der Mitbewerber sind wichtig. Die meisten Unternehmen kaufen Trendbooks, z.B. über Modeinformation Kramer oder das DMI, das z.B. Trendfarben gleich mit Pantone-Nummern liefert.

6) *Was sind die markantesten Unterscheidungsmerkmalen dieser verschiedenen Unternehmen?*

Regionalität/Internationalität. Die Fähigkeit auch auf Multichannel-Ebene kompetente Aussagen zu treffen und Gesellschaftliche Themen und Firmenstrategien mit einzubinden.

7) *Zeugt es von hoeherer Qualität eines Unternehmens, wenn dieses Trends von bekannteren Trendforscherunternehmen kauft?*

Das kommt auf die Art der Informationen und Trends an!

8) *Glauben Sie, dass Modetrends und Trendforschungsunternehmen eine wichtige Rolle in der Zukunft spielen werden?*

Modetrends wird es immer geben, bei den Trendforschungsinstituten kommt es auf die Qualität ihrer Arbeit an (8 s.u.).

9) *Was müssen die Trendforschungsunternehmen machen, um als Experten unersetzlich zu bleiben?*

Es geht heute nicht mehr darum einfach Informationen zu liefern, sondern eher darum aus der Menge von Informationen die richtigen Trends, mit dem richtigen Timing für die konkrete Zielgruppe zu liefern. Es geht als um das Filtern und Bewerten von Informationen, nicht um das bloße Aufzeigen.

10) *Wer erfindet Ihrer Meinung nach heutzutage Modetrends?*

Die Trends entwickeln sich durch gesellschaftliche Veränderungen, aus der Jugendkultur, durch technischen Fortschritt u.v.m. Will man wirklich neues entwickeln muss man großzügig denken.

II.ii Face-to-face interview with Professor Sybille Klose

Hochschule Pforzheim – Faculty of Fashion, Accessory and Jewelry Design
July 17th, 2015 in Hochschule Pforzheim [audio record]

[Amanda] [...] precious information.

[Klose] That's fine

[Klose] I'm personally I'm very skeptic about it. Uh. Because now it's more about (uh) really observation and we have too many different tendencies – I don't want to say trends. Because are groups and movements that you can observe, which ich happening in culture at different groups, and (uh) I once have been in a situation in Paris...

[Klose] I did a project for textile and they – actually the company – bought all these trend books from Promostyl and they told me I should relate on that. And it was a special project for a linen. And I said I never worked with trendbooks so why should I now work with the books? I hate to work with these books. And they said... their argument was that "because you are doing that linen and that linen is interior for a bedroom and all the carpet companies and all the wallpaper companies are working with these trend books. So if you are now doing that linen, which I am not fitting to the carpet and to the wallpaper, all collection wouldn't sell.

[Klose] And he was really driven nuts by that. And I thought... „Bloody hell!“ – I'm sorry for that – that can't be an argument. So I said, what about this, I'm looking at the promoted color cart, I'm doing my own color cart, which is matching with the promoted color cart, but it is my own color cart. And that was a deal.

[Klose] They accepted the deal. So my bed linnen might match with the color range of the wall paper and the carpet. But I'm not following that color cart, I'm now saying that I have my own accredited brain to think.

[Amanda] Uhum...

[Klose] Uhn. But I ment [what? Passage unclear] that company running this main field of working [aval? passage unclear].

[Klose] In Paris, they pro... uhn... they prefer to work with Li Edeelkoort and TrendUnion because she is giving more, same with David Chop view on color - the books are produced in Amsterdam – because they are giving more a mood. An less a clear instruction “that’s the perfect red for next season”. And because of, it’s still important... uhn... for French companies, while you would expect an unique statement from Dior, you would expect an unique statement from Chanel... uh, so... It’s too risky.

[Klose] However, it depends all on the market, on the market segment. Because then when you go to the mass market, uh... they might be different. Uh... But I never worked actually in that area, so... I really can’t tell.
I assume, I assume, but... uh... Hugo Boss wouldn’t... If they buy these books, they’d use it as an information base but it is an awesome question. I’d do it now to our alumni who is working there.

[Klose] They will all come. They are all around. You can ask him. I could reconnect with them or what you could do, aswell, maybe you could, ah... designing a little questionnaire and then we see how we can actually send them to the students who are working in the industry and how they apply to their position and how they use that and work of using it... that could be of help.

[Amanda] But your experience... do you think... uhn... they somehow use the name of the company or the bureau as a quality statement or as “we are using them, so we are in accordance with the market”?

[Klose] Oh... good question. I don’t really know and honestly I think that it really belongs to the segment where they are. Dior might have it in the drawer, but won’t say anything if they would do it. I never really know what happen to that drawer, I need to find out. But put it in the shells and say we got all the information. We are updated. Is more a proof... a proof of.. yes, we know.

[Klose] On the other hand. I think it’s good to research that field. Because if we look at it from the point of view, uh... how this publications has been important 15-10 years ago and what’s been now taken over by the internet. Either it’s WGSN... you know... a lot now have been [up and around the world [passage unclear] with WGSN, and they do their little street streaming, last trends... and then you have all the bloggers, saying... well, that’s what’s going on in Copenhagen... So... the question is... what about the other companies... it would be interesting to ask them aswell, either their way of forecasting has changed now... for the customers... because a lot of the information they gave 10 years ago, they are now on the internet, on the blogs. So they might need to shift in terms of whats they provide now for the companies to be still interesting for them.

[Amanda] Yes. That’s a big question. So, do you, yourself, have an idea of how this companies, or... what these companies need to do to remain as experts, the bureaux de styles?

[silence]

[Amanda] Because I think that’s what they are facing right now. For example, WGSN, is already doing data mining.

[Klose] Honestly, if they want to be remind and survive in that field, what they need to do and they already doing it, but I think it need to be reinforced... is doing interdisciplinary, diffusional aspect of it. Because a fashion company would travel

around the fashion fairs and doing their shopping, but you might also want to have time to interior. And because of things are so much more connected now, uh... I think... what could be interesting to... show the connections... because you have this shops like Collette in Paris, where you have not only clothing, but design objects going into conception artworks, and now we have Cafées with artwork, selling artwork... and clothing, uhn... and objects that we would not know if they are industrial objects or... because it seems to be that it is the logic thing, or if it is already a fine art object. And I think all of that is more of fusing... it's not separated anymore. So I think to survive, they need to look more globally, because that's what the company can't do anymore. They can go on blogs and we go on streetstyle blogs... but I'll have no idea how the latest [passage unclear... tanquery ?]... the latest contemporary design flat of a young designer, of a young artist or young musicians look like in Copenhagen... it might be interesting to know... because it gives you an idea about the music they would do, about the look he will wear on the stage and how that will influence fashion. Do you see these bits [passage unclear] and that distance becomes closer and closer to my point of view. So it's more... So if they want to survive that I think they need to feed more of these areas, in my point of view.

[Amanda] Uhn... Do you have an idea or an opinion of who is pretty much setting trends nowadays? Or... I think maybe that is too general, but... Who should the companies look at?

[Klose] You see. In my words, I wouldn't even say who is setting trends. I would say who is visualizing trends. Because setting trends... I'm actually, I'm a fan of [passage unclear]... and I'm going back to the ruins of what is fashion and when is fashion. And in my philosophy, you can't set trends, you can make trend proposals, you can make fashion proposals and you can try to visualize what's going on, if there's a culture group in where there seems to be something interesting. And that what they do, their way of lifestyle, their way of coolness, their way of travelling, their way of balancing work, travel and private life... it could mean all of that might be interesting for a bigger group. Because we talk about that fashion is when accepted by a group.

[Brigitte Wolf] So that's a point, the acceptance. And there might be a book, which is interesting for you, which is called Tipping Point.

[Amanda] Yes.

[Brigitte Wolf] Do you know that?

[Amanda] Yes. I do.

[Klose] I don't know that.

[laughter] [unclear passages]

[Brigitte Wolf]... because people are wearing this or that an... nothing happens, and then, suddenly, there is a point where turns around... and everybody... and it's a fashion. And... So, in this book Tipping Point they are analyzing some... uh... examples, where... for example, this one example is Hush Puppies, which are these boring shoes and sometimes... everybody was wearing it... but why did...

[Klose] Well, think about it... the, the German... uh... Birkenstock... house shoes... and suddenly it was a BOOM in Paris! Everybody in Paris! It was chic in Paris! And dann Sybille was doing the 500 euro version of having fur in that. And... huh... it had nothing to do with house, it didn't fit anymore... but it's exactly what you are...

[Brigitte Wolf] Uhum... So I think there is, we figured out some factors that might be responsible for creating a trend. Yes? But you never know upfront when...

[Klose] That's a point... You can only assume it... and we [unclear word] for example... I don't like the word trend, I'm avoiding it... I personally thought when and where is a fashion moment. I call it just fashion moment. Because I... Because... It's just because I'm struggling with the power of industry just making all this money and saying what... it's another philosophy... See... I'm coming from a [unclear 11:15] background. And my mom is still in this mind trick ringing her daughter up, once a year, who was living in Paris, and wants to know the length of the skirt. And she is still believing in that. And I say "Mom, you can have every length..."... "No! You don't want to tell me! You tell me". So, I'm telling her, ne import qua... I'm telling her... well, takes 86 and she is taking 86 and it's fine for a year.

[laughter]

And then, this actually shows this sort of... it doesn't work anymore this mindset and that's a huge shift. But there's still this huge industry... and I have to accept... I didn't know that the carpet industry is linked to the bed linen industry and is linked to the wallpaper industry... and... I didn't know that

[Amanda] Yes. In my work (...) I don't know how it's gonna be translated to English now, but I try to do this differentiation of what would be a tendency and what is a trend [...]

[Klose] Yeah

[Amanda] [...] in a more commercial way. For example what WGSN does... this is a trend... and... Yeah, I think I have... ugh... in general, the same ideas. And I think that something is out there. I think people already realize that and also in the companies but people... they are still buying WGSN, or Peclers or Carlin and that is what somehow bothers me... then... it's not that I don't like them, it's just... I don't understand why people are buying it, if it doesn't work anymore... so... that's pretty much what I am trying to dig in.

[Klose] Well... uh... it's because of the circle. The fashion circle is so fast.

[Amanda] This coordination...

[Klose] It's not only coordination. It's... well... yes and no... If you are developing... not saying every six months... but look at it now. They're doing in between... in between collections, yes? They're doing Cruisier, they're doing special editions for people going on summer holidays before Christmas.

[laughter]

[Klose] Yeah... So you need bathing suits in December, yeah! For the rich ones who are going somewhere in the Rivier or whatever. So, the circuit got faster, they are far more... before... ten years before, in Europe, where did you have your production? Even if it's gone [words unclear] in Germany, it was in East-Europe. So it was Poland, it was Bulgaria. So now this somewhere is Bangladesh, it's Malaysia for knit, they have all the specialists. So, you need to look at the collection. Having 120 pieces, it would be interesting to ask how many companies... uh... how many countries are involved.

[Klose] The thread is coming from here. The treatment is coming from down here. Yeah... Hermès is doing its embroidery in India, in Bombay. It's a friend of mine who is doing the embroidery of the entire stoffs [word unclear – Stoff means fabric in German] for Hermès and he is doing the entire embroidery for Chanel, for the Haute Couture

from Chanel. [...] That's done in India. It needs to be shifted to India. That time needs to be calculated.

[Klose] Which means, you are more suddenly busy with what I need to have... is not only the production behind... for the prototypes, but as a designer... you don't wanna sit in Paris and say: "Man, it would be nice to having some ports [word unclear] and some shells and some glass stones"... You would travel to India and see what they have in terms of sourcing. But if you travel to India, you can't go to New York to see the streetstyle. So how do you get all this information. It becomes so transparent, so global, so fast!

[Klose] So what happened actually, it's like... and I think it's something that you find in other areas as well, that costumers feel overwhelmed by the offers. In any other field as well. So they take sometimes a personal assistant paying him and saying: "Could you do me a pre-selection, please?" And the function is, of the trend, is pre-selection. Yeah... it's seems to be that was already... for some people understanding it... so I don't have to look into everything. That is what I'm telling students when they ask me if they do their research with Google. I say no, you're not doing your research with Google, Google is doing the research. Because Google is deciding what will appear. And not you.

[Amanda] Yes, we did a work about that, as well.

[Klose] Yes, so there is this thing about... we need a pre-selection and... but... as an innovator, wouldn't be the innovation exactly between the things that haven't being selected and how could I find them? And what of a full cost that would do it [passage unclear] would I find it, would I recognize it? Because in the end of the day, they might... but then... they... you need to understand their point of view, because they wanna make money out of that. So they might be interested in doing it for the big market. Because when they find a gap, which is interesting, C&A, Marks&Spencer are not interested for the gap-client. They are addressed for the markt, to the mass-market. So they want to know what the mass-market is. And then... in a certain way, you can do it. Because you notice Dior is using this color and this is quite coming in shape and people might like labels on [words unclear] or big pullovers, or they... [words unclear]. But I think because we have what we... what we call... uh... [pause] hybrid client, it became more and more difficult.

[Klose] Because you can't say anymore "this is the income", "that person will do this"... uh, because, you know... it's like... a hybrid one... So it's more about what kind of mentality, what kind of... what is your personal lifestyle... Lebenswelt... the deutsches word is not the same as the English word lifestyle, but it's approaching it... it's the Lebenswelt (life "world"). And you can have someone... same age, same job, living in the same building and they [have] never met. Totally different interiors, totally different interests, other music, but same income... could be the same client, but they might buy totally different products. So it's the world use [word unclear], whatever, their lifestyle leads they, and I know that the car industry is working the same way.

[Klose] Because you can't say anymore, yeah, "this Mercedes is for [word unclear] a director of a Bank". Because the director of the bank might chose a motorbike now and not a Mercedes at all. Because it is cool. So, so... that's the funny thing about it. Which I think it's great because it makes people need to think.

[laughter]

[Amanda] Uh... it just flew away, my question!

[laughter]

[Klose] You can write it down...

[general noise and unclear passages]

[Amanda] Do you think for the mass-market with all the data mining of sale results and so and so on... wouldn't it be also helpful – maybe not enough – but also a guideline for creation, like... what do you think are the guidelines for... jetzt... “now we need to launch a new collection”... how do we start? What inputs do we have?

[Klose] You see... I don't know, because it seems to be that because if you do it to the mass market, uh... the risk today is if you follow that... I think the one way a trend agency could survive is maybe offering personalized visions about whats [inquire? word unclear]. Because when you are doing a general one and you're selling it and everybody is doing the same and you have it all over the place... it's just really what sells in the end of the day... it sells something different... now if everybody is doing the same... is it really working on the long term? That would be the question for me. Yes, that would feed the common taste... common taste, yeah.

[Amanda] If that exists anymore...

[Klose] The one thing is whether it exists...

[Brigitte Wolf] It does because it's a social impact [fact]. Because you always want to be accepted and social-peer-group and if they dress in a certain way... you want...

[Klose] to look similarly, yeah.

[Brigitte Wolf] Maybe you like this certain shape, maybe you don't [unclear passage]. But there is always the social acceptance, that you really need as a person.

[Amanda] But then... it gets old too fast. Once everyone is using it.

[Klose] That's the point... I mean, it doesn't matter... you feel now... people wants to by stripes now and no one has got stripes in their wardrobe... what will happen? They will appear nearly at the same time somewhere between the middle market, ancient [words unclear] and even Aldi and Tchibo and what-whatever, so at the same time you can buy the stripe at the coffee-shop... yeah... and... I don't know... at the Petro station... yeah... in a shopping mall. So what is the difference now? For one side, is it the price? So what now? Being fast and cheaper. But the second I'm being fast and cheaper to serve the market because everybody wants stripes and then you have two stripe T-shirts and then [word unclear] stripes. Or you are doing something else... you're doing something different, something new, something slightly next to the stripes, [passage unclear] and that's what the other companies are doing. They're taking the tendencies and saying “ok, super” but I'm not following it, I'm doing another [improved? Word unclear] to what's it. I'm adopting it.

II.iii Face-to-face interview with Professor Martina Glomb

Hochschule Hannover – Faculty of Fashion / former employee of Vivienne Westwood

November 9th, 2015 in Hochschule Hannover [notes]

She has worked for 10 years with Vivienne Westwood and 12 years as a freelance designer. She has personally never used WGSN.

She was responsible for arranging the “scholar” subscription of WGSN for the university, but she does not stimulate students to use it. By the way, she mentioned disappointment

when relating that recently two or more students came with the same idea of extra-high-waist jeans, exactly as proposed by WGSN. She considers the mistake/hit process much more interesting for students, then trying to get it “right” right away by copying proposition of trend forecasting companies.

She considers WGSN a market tool – as well as a market control tool. Companies that buy WGSN do it afraid of letting some important trend go. She considers WGSN, for example, a superficial tool: information is “too ready” (zu fertig). Everyone becomes the same and for WGSN itself, that is not good, since it does not support any major innovation or super creative collections.

She thinks it would be a good idea to talk to WGSN and try to understand (if they are open enough to talk to me and give me any sort of relevant information) what they plan for the future, because as a future-focused-company, they are not stupid or naïve and acknowledge the dissatisfaction of the market.

She mentions that some students make good use of WGSN (können es gut benutzen). She talks about 2 alumni students, who launched a label (she will proceed the contact with them). Also during my visit in the draping room, she asked 4 students (3 bachelor and 1 master) if they use WGSN (Hannover has the scholar license to the portal). Only one uses it. She elucidated that she uses it as a reference and to analyze and to interpret the information. The professor agreed, saying that she makes good use of it. Laughing the student said “I don’t copy it. For that is Pinterest much better”.

Professor Glomb talked about the ID Magazine: she finds it extremely useful, interesting and inspiring. It shows news on music, cinema, art, etc... and it give gradual and development perspective. It is much more enlightening. She said she could live without WGSN or pizza, but not without ID Magazine.

She has also helped with a list of companies to proceed further contact. She will contact people with who she has direct contact and personally address them to me. She mentioned Cecil as a possible “similar” to Seidensticker. The already listed names were the following:

Anett Kolling (former H&M, now Liebeskind); Claudia Bothe (Liebeskind); Robin Scheibler and Jing Jing Qi (Boom Studio); Philip Rudzinski (Balagans); Brigitte Stepputtis (Vivienne Westwood); Alex Krenn (Vivienne Westwood); Christoph Becker (Wunderkind); Katjia Langhammer (Cecil)

I promised to resend my abstract to her and she will proceed the contacts with them and further designers.

III. FRAMEWORK FOR INTERVIEWS WITH FASHION COMPANIES

III.i About the employee

1. Confirm interviewee's name and position at the company.
2. What are your main activities at this position?
3. Since when do you work for this company?
4. Have you worked for other fashion companies in the past? If yes, in which? What was your position and how long have you worked there?
5. What formal education did you have in the field?

III.ii Company's trend orientation

These questions regard the company's trend orientation and how the market accepts trends. Topics of particular interest are the changes resultant from the internet and trend democratization.

1. In your opinion, are trends important to a fashion company? What is the attitude of the company to the implementation of trends? How far is the company trend-oriented?
2. What skills and what knowledge about fashion trends are there in the company? Is there a trend research department? Are there experts in the company? If no, where do the information about trends come from to design a new collection?
3. In what market niche does the company operate? How important are fashion trends for these customers? Are the customers oriented to the mass market? Are they more likely to quickly adopt new trends or are they more traditional? How does the company design its products based on the company's market trends and brand positioning?
4. What methods do you use for the analysis and evaluation of fashion trends? Is there a stock control? How do you measure and analyze the influence of the trend application in the success/failure of the collection?
5. Does your company researches and adapts its strategy based on long-term trends (sociological and cultural trends)? If so, how does that affect the corporate strategy, positioning, market and consumer research, product line, etc.?

III.iii Trend reports

With the advent of fashion trend research, trends have been developed as product directions and planned far in advance. This procedure is designed to coordinate supply and demand in the fashion industry's supply chain.

1. Do you purchase trend reports and trend books? Which ones? Why? From which fashion trend forecasting companies?
2. Does fashion forecasting companies play an important role at market placement? Which trend research company is considered the best and the most assertive?

3. How important and useful are the information of fashion trend companies for you? How do you apply that information?
4. What other information about trends that is **not** explored by trend research companies, do you consider useful and important for the design of a fashion collection?
5. How do you generally rate the role of trend research companies for the fashion industry?
6. Does the company or the design department feel pressured to follow certain trends?

III.iv Product development

The questions relate to the collection design, the launch cycles and the use of new technologies, as well as to the product evaluation prior to launch, including trend concepts, consumer preferences and the brand identity.

1. How many collections are designed every year? Who determinates the dates and how many collections should be presented?
2. Which information do you deliver designers to ground their product development decisions?
3. Does production-flexibility influences product development? Does the trend departament also analyzes sales data?
4. How do you rate your business compared to the competition, regarding the implementation of trends?
5. Which sources provide inspiring trend information?
6. When you research trends, what and whom do you observe? Who sets trends nowadays?
7. Does the company explore individual and cultural differences in consumer behavior, lifestyles and values in the local and global markets?

III.v Enterprise

1. How many people does the company employ? And the design department?
2. What are the top-selling lines or clothing?
3. What is the company's revenue?
4. What are the most important concurrent brands?
5. How is the company organized?

IV. INTERVIEWED GERMAN FASHION COMPANIES

Company	Headquarters	Founded in	Original Country	Address	Interview date	Interview partner	Position in company	Register form
Hugo Boss	Stuttgart	1924	German	Dieselstraße 12 72555	05/10/2015 at 15:15	Michael Kampe	Head of creative management denim sportswear	audio file [28:03 min] and transcript
Adidas	Herzogenaurach	1924	German	Adi-Dassler-Strasse 1 91074	14/10/2015 at 17:27	Michael Staib	Designer director Adidas Originals	audio files [75:00 min] and transcript
Ilse Stammberger	Köln	1990	German	Große Brinkgasse 31, 50672	12/11/2015 at 14:00	Ilse Stammberger	Owner and head of design	audio file [59:17 min] and transcript
Seidensticker	Bielfeld	1919	German	Herforder Straße 182-194 33609	21.10.2015 at 09:30	Fadia Naschar	Head of creative manager	audio file [53:58 min] and transcript
Stephan Schneider	Antwerp	2005	Belgian	Reynderstraat 53 2000	14.01.2016 at 20:01	Stephan Schneider	Owner and head of design	audio file [54 min] and transcript
Windsor GmbH	Bielefeld	1889	German	Am Ellerbrocks Hof 2-6 – 33617	07.02.2016 at 15:09	Claudia Jünemann	Design Specialist windsor. women	audio file [40 min] and transcript
Mustang Jeans	Kunzeslau	1932	German	Austrasse 10 74653	10/03/2016 at 15:01	Hans Bernd Catsburg	CPO	audio file [34 min] and transcript

Fond of Bags	Köln	2005	German	Vogelsanger Str. 78, 50823	03.03.2016 [Gerrit Färber] and in 07.06.2016	Michael Damm	Corporate responsibility	transcript
Hessennatur	Butzbach	1976	German	Marie-Curie-Str. 7 35510	21.03.2016 [Franz Brennecke]	Sven Bergmann	Public Relations	audio file [34 min] and transcript
Dorothee Schumacher	Mannheim [Düsseldorf]	not available	German	Industriestr. 47 D-68169	08.02.2016 [Burim Selimi]	Andrea Marquardt	Senior Creative Manager	audio file [66 min] and transcript
Tommy Hilghfiger	Amsterdam	1985	American	Stadhouderskade 6 1054 ES	18.02.2016 at 12:16 [Burim Selimi]	Birgit Dietrich	Creative project manager	audio file [37 min] and transcript
Tom Tailor	Hamburg	1962	German	Garstedter Weg 14 22453	29.04.2016 at 16:15 [Marc Stender]	Felix Bösel	Senior Design Manager Menswear	transcript

V. CODES APPLIED TO THE ANALYSIS PROCEDURES IN GERMANY AND IN BRAZIL

Coding system Germany		Entries	Coding system Brazil		Entries
Total of entries		604	Total of entries		728
WGSN		0	WGSN		26
Use of macro trends		9	Use of macro trends		20
Timing in the fashion industry		27	Timing in the fashion industry		40
Use of data-mining		11	Use of data-mining		16
Commercial factor		61	Commercial factor		55
	Non-discourse	2		-	-
Other sources of information		58	Other sources of information		48
Product attribute focus		31	Product attribute focus		11
Purchase of trend reports		22	Purchase of trend reports		4
	Not purchase	4		Not purchase	12
	Purchase	0		Purchase	4
Trends as means of communication		8	Trends as means of communication		2
	Comm. is hard in fashion	4		Comm. is hard in fashion	7
	Internal communication	12		Internal communication	13
	External communication	7		External communication	14
	-	-		argument	20
Trend information proximity to market		1	Trend information proximity to market		27
	Far	4		Far	0
	Close	3		Close	1
Trend adoption by customers		8	Trend adoption by customers		32
	Belatedly	13		Belatedly	4
	Immediately	0		Immediately	0
Workload		0	Workload		11
	Trends increase wl	3		Trends increase wl	1
	Trends decrease wl	6		Trends decrease wl	6
Security		13	Security		12
	Protect	5		Protect	10
	Threat	7		Threat	9

	-		-		Support	13		
Judgment of trend reports			0	Judgment of trend reports			4	
	For the company		6		For the company		6	
		+	11			+	8	
		-	11			-	10	
	For the industry		7		For the industry		9	
		+	14			+	16	
		-	2			-	2	
Company's orientation for product design			7	Company's orientation for product design			15	
	100% brand		53		100% brand		20	
		Individual style	20			Individual style	17	
	100% trends		5		100% trends		5	
Use of trend reports			16	Use of trend reports			11	
	Do not use		15		Do not use		7	
	Use		7		Use		13	
		For inspiration	23			For inspiration	10	
		For application	11			For application	20	
		For ratification	7			For ratification	4	
			reaction	6			reaction	9
Level of trend adoption			6	Level of trend adoption			16	
	Level of trends applied to products		10		Level of trends applied to products		16	
		Apply	13			Apply	13	
		Not apply	7			Not apply	7	
	Follow trends		8				11	
	Create trends		17				4	
-			-	Filter which trends to adopt			38	
	-		-		Department or employee for trend analysis		14	
-			-	Overload			5	

VI. INTERVIEWED BRAZILIAN FASHION COMPANIES

Company	Headquarters	Founded in	Original Country	Address	Interview date	Interview partner	Position in company	Register form
Happy	Blumenau	2012	Brazilian	R. Teobaldino Pereira, 54 Itoupava Norte	11/08/2016 at 15:00	Stephany	Head of design	audio file [42:02 min] and transcript
Alphorria	Belo Horizonte	1986	Brazilian	Rua Platina, 241 Prado - BH	04/08/2016 at 9:00	Vanessa Cabidelli	Marketing director	audio file [26:36min] and transcript
TNG	São Paulo	1984	Brazilian	Av. Barueri Mirim, 730 Galpão 01 sala 17 Jardim Belval - Barueri	12/09/2016 at 10:00	Lucas Quaggio Rodrigues	Designer	audio file [39:40min] and transcript
Riachuello	Natal	1947	Brazilian	Rua Leão XIII, 500. Bairro Casa Verde Distrito Casa Verde Zona Norte - São Paulo	15/09/2016 at 15:30	Elice	Designer at production	audio file [44:17 min] and transcript
Lui Iarocheski	Florianópolis	2014	Brazilian	Av. Osvaldo Rodrigues Cabral, 1570/221 Florianópolis-SC	16/09/2016 at 14:00	Lui Iarocheski	Owner and designer	audio file [34:23 min] and transcript
Giuliana Romanno	São Paulo	2006	Brazilian	Rua Peixoto Gomide, 1757F Jardins	19/09/2016 at 09:15	Elza Bastos	Style director	audio file [39:52 min] and transcript

Lenny Niemeyer	Rio de Janeiro	1991	Brazilian	Rua São Clemente, 258 8º Andar – Botafogo	29/10/2016 at 14:00	Mariana Lima	Style coordinator	audio file [20:00 min] and transcript
MOB	São Paulo	1989	Brazilian	Rua do Consórcio, 170 Vila Olímpia São Paulo	07/10/2016 at 15:00	Bianka Frota	Designer	audio file [45:24 min] and transcript
Dudalina	Blumenau	1957	Brazilian	BR-470 . Km 50 . Nº 7109 BairroFortaleza	08/10/2016 in the afternoon	Hervè Tomedi	Design director	audio file [46:28 min] and transcript
Fila	Seul	1911	Italian	Rua Marcílio Dias, 10, Centro Saudades - SC	18/10/2016 at 16:00	Daniela Rodrigues	Design director	audio file [52:37 min] and transcript
Isabela Capetto	Rio de Janeiro	2003	Brazilian	Av. Borges de Medeiros, 3647/4º andar Rio de Janeiro-RJ	28/10/2016 at 11:00	Isabela Capetto	Owner and designer	audio file [11:03 min] and transcript
Melissa	Farroupilha	1979	Brazilian	Av. Pedro Grendene, 131 Volta Grande - Farroupilha, RS	26/10/2016 at 10:00	Edson Matsuo e Jacira Lucena	Design management director and design coordinator	audio file [51:44 min] and transcript

VI. FRAMEWORK FOR DIAGNOSIS INTERVIEW/QUESTIONNAIRE

LEVELS OF TREND REPORT USAGE

VII.i Use for inspiration

1. Do you use fashion trend reports for inspiration?
2. How do they influence your design process?
3. Which of the content do you most like? Why?

VII.ii Use for internal coherence

4. Do you believe when all designers from the creative team have access to the same fashion trend information – here, due to the access to fashion trend portals or books – it contributes to the team’s internal coherence?
5. Which are the activities conducted so every designer “is on the same page”?

VII.iii Use for concept application

6. In the job of fashion designer, do you consider that accessing fashion trend reports help you in the definition of concepts for a fashion product collection?
7. Where do the main ideas come from?

VII.iv Use for product application

8. Do you and other designers of the creative team apply any or some of the fashion trends conveyed by *bureaux de style* into fashion product attributes?
9. Please consider each of the following attributes:
 - [a] colors;
 - [b] materials;
 - [c] surface treatment (prints, textures, etc.);
 - [d] shapes and fits;
 - [e] statement garments.

VII.v Use for verification

10. Do you and/or your colleagues turn to fashion trend reports – in the form of trend books, magazines and portals – to confirm the path you have taken the collection?
11. At this moment, do you adapt some aspects of the collection or insert new products in order for the collection to fit to the market trends?

VII.vi Use for argumentation

12. Do you, as a fashion designer, consider a valid argument/reasoning for your superiors the confirmation that a specific product or product attribute addresses a trend broadcasted by a renowned *bureau de style*, such as WGSN or Promostyl?
13. For what reason do you believe that this type of “confirmed” information endorses decision-making?

VII.vii Use for branding

14. Are fashion trends valuable strategies for the communication/commercialization of a fashion collection?
15. Is it important to present fashion trend resemblance in advertising campaigns, window displays, runway shows and other actions of brand communication?

VIII. VALIDATION INTERVIEW'S FRAMEWORK

VIII.i Presentation of developed research

During the years of 2015 and 2016, interviews with designers and directors of renowned companies in Germany and in Brazil were conducted. From these fashion designers and directors:

7 AUTHORIAL DESIGNERS

Stephan Schneider, Ilse Stammberger, Dorothee Schumacher [Germany], Isabela Capeto, Giuliana Romano, Lui Iarochescki & Lenny Niemeyer [Brazil]

17 COMMERCIAL BRANDS

Hugo Boss, Adidas, Tommy Hilfiger, Tom Tailor, Seidensticker, Windsor., Mustang Jeans, Hessnatur & Fond of Bags [Germany], Alphorria, MOB, Fila, TNG, Riachuelo, Happy, Dudalina & Melissa [Brazil]

Ratio not-/purchase of fashion trend reports:

Among authorial designers: [1 in 7 acquire fashion trend reports]

Among commercial brands: [15 in 17 acquire fashion trend reports]

VIII.ii Interview

Fashion trend orientation

These questions refer to the orientation of fashion companies to the trends researched and edited by bureaux de style. Of particular interest of this topic are the subscription and purchase of services and products of fashion trends by fashion companies and their use or not use.

1. How do you identify the relationship between fashion companies with fashion trend forecasting agencies – bureaux de style?
2. To you, what does it mean to „use“ a fashion trend report or portal?
3. Do you believe that these reports are much or little used in Germany?
4. Why do you believe that companies affirm not to use these reports, but continue to put up with their costs?
5. Which reasons drive fashion companies to subscribe to fashion trend research services?
6. In your opinion and based on your large experience, how do you consider the relationship between [German/Brazilian] designers and creativity/inventiveness?

Types of fashion trend report usage

The analysis and interpretation of interviews with designers and directors led to the perception of different types of fashion trend report usage. The following questions have the goal of validating the identified types of fashion trend report usage.

1. Do you believe that fashion designers use fashion trend reports as a source of inspiration? Do you agree that, for such use, they would access it during the research phase?
2. Do you agree that fashion designers use fashion trend reports for the definition of the concept of a fashion collection?
3. In your opinion, are fashion trend reports used for product application? Do you believe that designers would access trend portals (WGSN, for instance) continuously throughout the design process?
4. Could fashion designers use trend reports for verification? Do you suppose they are more likely to belatedly adopt or intentionally avoid fashion trends?
5. Do you believe that having access to fashion trend reports contributes to the intern coherence within a creative team? For that goal, when would designer access the reports?
6. Do you consider that fashion designers refer to fashion trend reports and their renowned brands – WGSN, Promostyl, etc – as an argument to defend their designs to the directors of the companies they work for? Why? At what moment of the process would this happen?
7. In your opinion, do fashion designers make use fashion trend information from bureaux de style to conduct branding actions – such as advertising campaigns, window displays, visual merchandising, etc.? Do you trust trends to be lucrative arguments for “external” communication in the commercial segment of fashion – i.e., are consumers more likely to be attracted to trendy products?

CURRICULUM VITAE

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