

FASHION FORECASTING

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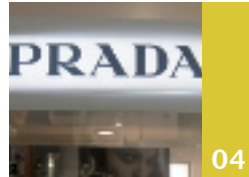
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Preface



Introduction



Design Intelligence – Brand



Design Intelligence – Futures



Design Intelligence – Other Key Players



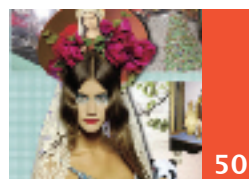
The Fashion Forecasting Industry



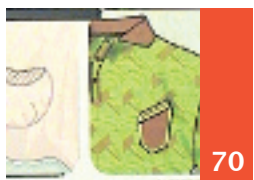
Here & There



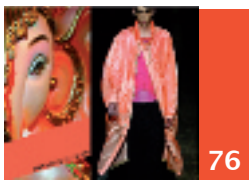
Mudpie Design Ltd



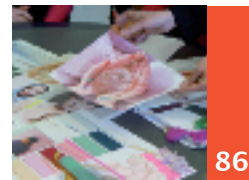
WGSN



Carlin International



Trendstop



Peclers Paris



Concepts Paris



Li Edelkoort



Other Key Players



Fashion Forecasting – Magazines



WeAr Global Magazine



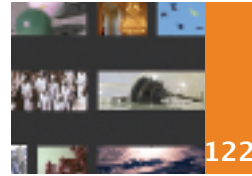
View Publications



Textile View Magazine



View2 Magazine



Viewpoint & View
Colour Planner



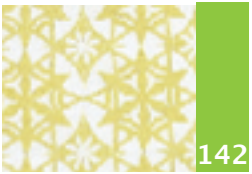
The Process



The Process - Colour



The Process - Inspiration



The Process - Fabric



The Process - Mood
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The Process - Seeing



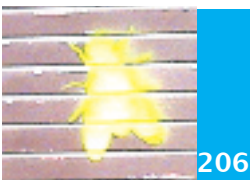
The Process - Case Study
Womenswear



The Process - Case Study
Menswear



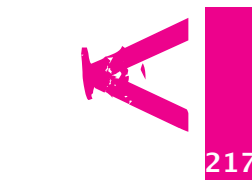
Communication - Type



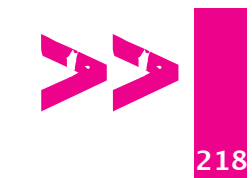
Communication - Layout



Communication -
Application



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This publication is designed to set out the role of forecasting in the contemporary fashion industry. The scope will be that of looking at lifestyle trends, products and services. Forecasting is a tool used by designers, manufacturers, retailers, marketers, CEOs (Chief Executive Officers) to give their brands creative dynamism in an increasingly competitive marketplace.

It is aimed at aspiring designers, intermediate students and young professionals who have some fashion knowledge and skills and professional practitioners. The book takes the point of view of the student designer who needs to interpret the intelligence, provided by the industry, in order to be self-sufficient, directional and constantly inspired. Illustrating not only how forecasting companies function – the process – the future – but also how to communicate trends using recent developments in illustration and graphics. It is an industry where ‘intelligence’ material is gathered, analysed and communicated to its clients as clearly, speedily and economically as possible.

A number of devices are used in this communication, primarily traditional book publishing and the Internet. Each medium has its merits, the Internet especially for speed of accessing the latest fashion information straight from the catwalk, the published book for its tactile and textural information qualities. Both approaches are essential for today’s designer.

This book works in sections. The first section outlines trends and futures companies, the second a number of fashion forecasting services, those using traditional book publishing – Here & There; those appealing to a particular market, Mudpie Design Ltd (children and teenage) and Concepts Paris (lingerie); those that offer their service solely online, WGSN and Trendstop; those

well established services that offer insight such as Carlin International and Peclers, Paris.

Each company has its own approach, but they all gather fashion intelligence from around the globe that is edited and sold to their clients via subscriptions to their services.

The section also explains the flow of information which happens across a number of months in the fashion calendar.

The next ‘process’ section sets out to describe how to develop intelligence for a new season.

It begins by analysing the use of colour; where inspiration may be derived; fabric inspiration and the relevant trade shows – which in turn offer their own forecasting information.

Information is available everywhere, but how can more sense be made of it and how can the designer get more from a season? Part of this section deals with ‘seeing’ – the reading and understanding of the visual. Exercises to analyse mood boards are included to derive as much meaning and diversity as possible from a season’s intelligence. This information is provided by Emma Jefferies. Emma is currently studying for a PhD in the ‘visual literacy’ subject area.

As consumers become more visually literate and markets more competitive this analysis offers another tool to the would-be fashion forecaster. There are two sets of case studies in this section, one on womenswear, the other on menswear and the differences in designing for each are explored.

The final section is about layouts for publication, using typography to express mood and style and branding, and offers examples of a student’s work that illustrates some of these ideas across a range of media.

FORECASTING BACKGROUND

Fashion Forecasting has emerged as an industry in line with mass production and retail development and became a serious industry after the end of the Second World War.

Changes to the fashion industry over recent history have been reflected in the manner in which prediction information is sourced, compiled and utilised.

There has been a shift from the 1960s onwards in the dominance of single fashion trends to a more pluralistic approach, mirroring the expansion of mass communication and in turn the increasing sophistication of the consumer. This has created a gradual repositioning from a marketplace that was defined by both the designer level, influencing the middle and mass market, creating designs and trends that 'trickle down' to commercial high street product and the converse effect of street styles and subcultures inspiring designers, to one which is focused on the individual and fragmented into niche markets, where the consumer's aspiration is brand led and lifestyle driven.

During the post-war period, forecasting companies compiled stories and themes each season that were easier to predict, as the market moved at a slower pace. Prediction information was compiled into books that could deliver information that was both visual and tactile. Often there was an element of hand crafting in the production.

Themes were also more predictable and often fell into evolving stories that reflected the slower moving trends of the time, for example, each season would see an update of classic stories, nautical, ethnic, purity, floral and geometric.

Typical themes from this time reflected

the simplistic nature of the market, for example 'Milkmaid', 'Poacher', 'Safari', 'Country Squire' and 'Folk Story'.

Colours were more simply divided into neutrals, midtones and darks and brights and less market segmented than today. A random selection of modern theme titles reads 'Fresh Revelations', 'Allusions', 'Chameleon' and 'Filter'.

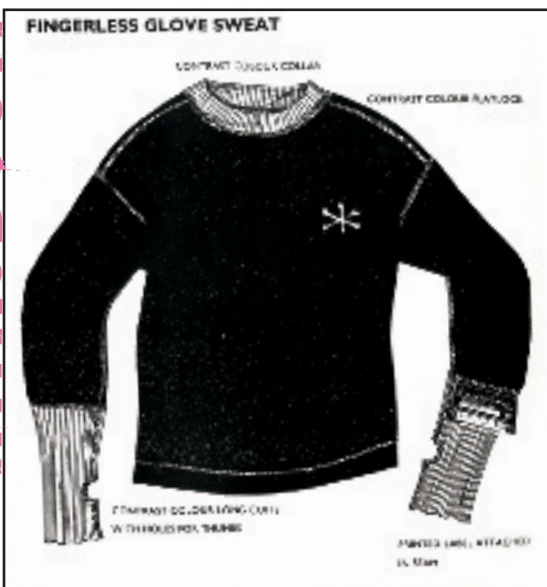
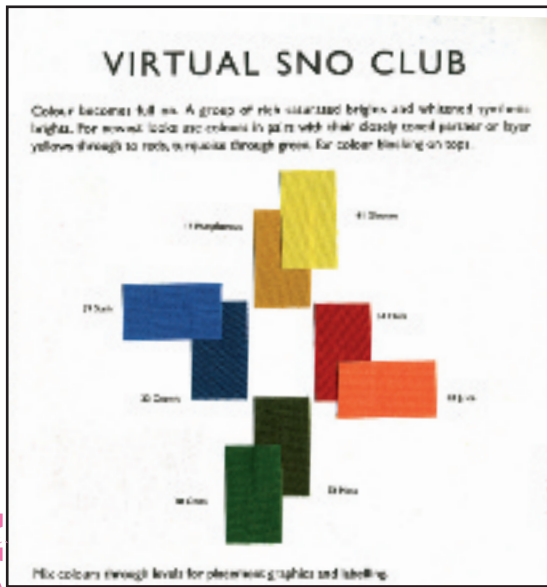
Over a period of time, wider ranging products were encompassed, sportswear, homeware and media and telecommunications and even other design disciplines, such as transportation design.

The advent of the worldwide web revolutionised the industry and enabled new Dot.Com companies to publish forecasting material that reported on global trends in a fast and distinctive manner. This required intelligence gatherers to be based in key cities across the world, reporting back any new findings; often they would be employed as freelancers or would be allied with the company's agency in that city. Many services employ illustrators and designers on a freelance basis also.

It is interesting to note that the web has changed the industry, but the tactile nature of the traditional forecasting book has still retained a market share and is essential to the fashion industry.

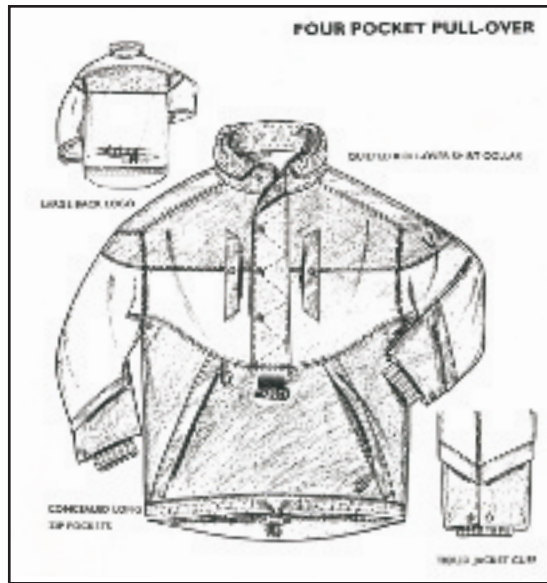
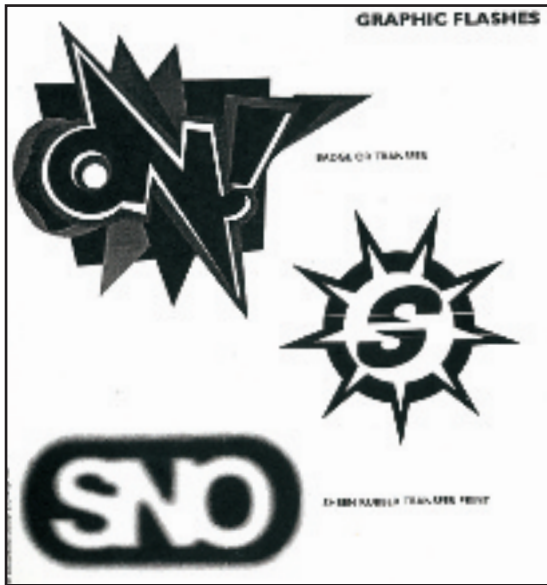
The traditional book is often of limited edition, for example, approximately 500 may be produced.

These books often contain fabrics from the most recent trade fairs, which have been purchased as sample lengths and hand swatched and pasted into the books. Or a combination of new and vintage fabrics may be used in the directional publications.



The theme above illustrates a menswear active sports theme forecasting trends for Autumn/Winter 1996/97; this information would have been compiled in the spring of 1995. In examining the detail it is interesting to note how the information compares to more contemporary stories. What is striking is how forward thinking this information appears given its age.

Despite there being less focus on technology, performance related details and fabrication and the overall effect being less sophisticated and under developed than contemporary information, the general silhouette of these types of garments has only changed marginally over the lifetime of the trend to become the ubiquitous basics of the youth market.



The most obvious distinction, in the examples is in the graphics, which appear lacking in authenticity and complexity, however, the interaction of graphics and fashion were beginning to expand at this time so any company investing in this direction would have gained market advantage.

IMAGES COURTESY OF IN.D.EX. CIRCA 1996

FORECASTING AND BRAND DEVELOPMENT

As fashion consumers and products became increasingly complex in their use of information technology, materials and processes, distinct fashion brands developed identifying and marketing aesthetics, perceived authenticity and integrity to their target audience. This engenders consumer's trust in the brand's products and values and may also be perceived to qualify the taste, wealth, sub-cultural loyalty or ethical beliefs of the purchaser.

A brand is a concept that is difficult to define as it has to constantly re-invent and delineate its meaning, however it is commonly regarded as being a product and/or a service in addition to the producer or provider itself. This constant repositioning and balance of ethos and current zeitgeist provides a customer base for futures and forecasting consultancies to advise.

In many companies marketing is done by different groups, advertising, product development, consumer research, public relations, forecasting agencies can co-ordinate and focus these activities more cost-effectively and with a clear focus on being the driving force of the organisation.

Changing economic and political climates affect how brands connect with the marketplace; current reactions to issues such as globalisation, ecology, recession, terrorism, for example, create both dangers to brand perception but also opportunities, as a brand is a powerful tool for consumer reassurance, comfort through familiarity and loyalty.

Brands such as Prada, Gucci, Chanel, Hermes, Versace and Armani have immense power to generate sales in the luxury market by authorising lucrative licensed products, for example, sunglasses, luggage, perfume and jeans. A brand is the difference between a fizzy drink and 'The Real Thing'.

Modern organisations construct brand identities by appropriating a set of core values along with promoting a strong visual image, including trademarks, logos, typeface and colour. This creates a brand personality, a philosophy for consumers to aspire to. The brand's constructed image represents the essence of the organisation.

"Nothing happens until somebody brands something."

THE IMMUTABLE LAWS OF BRANDING



DESIGN INTELLIGENCE - BRAND



FUTURES CONSULTANCY CREATIVE SOLUTIONS

The trend prediction industry becomes more diagnostic where it crosses into market research and futures consultancies, here it utilises quantitative and qualitative, mathematical and statistical techniques in order to advise brand strategies. These companies work as consultants to large companies in analysing the social trends that are affecting the consumer and advise on the best way to implement strategies within the future consumer environment across the world.

These consultancies offer insights into future consumers and how to target clients in the retail, technology, finance, automotive, food, fashion and creative industries. They build scenarios of future trends to help develop new products, or to forecast future revenue or market size. They report on emerging trends developing around the world, from the inside story on the world's most innovative cities to interviews with leading visionaries in design, architecture and consumer culture. The focus is on integrating analysis of economics, technology, politics, lifestyles, attitudes, consumption patterns and demographics.

Most businesses and other organisations know that they need to be customer focused, but may know little about their customers in reality. Futures consultancies advise that to be successful you must first understand and anticipate your customer. They provide a service for those who are looking for new ways to communicate, to develop products and strategies in a way that is more resonant and fit-for-purpose, asking how, why and where their brand needs to be in relation to current markets, and consumers' future needs. Brands can fail when they don't anticipate these shifts so this type of information is important in building

new strategies and developing company thinking on the key issues facing their organisation.

Futures consultancies work by merging trend prediction information and market research data, mixing expert interviews, intuition, quantitative and qualitative snapshots of key consumers, ethnographic and interrogative studies of target groups and by interpreting this information for specific brands to react in a more strategic and market-ready way.

There is an extensive network of professionals working in the creative and branding industries advising brands to use the most relevant and up-to-date trend information and consumer insight tools to better anticipate market needs. The aim is to help better understand the changing world; the customer's needs, both now and in the future, and the opportunities they afford.

PRODUCTS AND SERVICES:

BRAND STRATEGY PACKAGES

Can be either bespoke services or annual subscriptions, these assess performance against competition, inform on emerging trends and markets and assist in envisioning new products and opportunities using a variety of methods and techniques.

MARKET RESEARCH DATA

One of the important services offered is that of thorough market research and observations of consumer behaviour. Quantitative market research surveys are conducted, collating large-scale data; these reports enable patterns to be distinguished giving insight into the changing marketplace. In addition there are specific ethnographic and demographic studies, expert interviews, case studies and focus groups offering information on particular subjects for example, youth culture and the over 45s.

CONSUMER BEHAVIOUR

Consultancies study long-term statistical trends and provide information on emerging economic and social patterns in family life, housing, entertainment, finance and leisure activities.

METHODOLOGIES

Many consultancies have developed their own patented mapping processes or barometers using scientific methods of plotting reference points creating a more systematic approach to analysing information and synthesising the data into actionable forecasts.

CONSUMER BAROMETERS

These provide advanced planning for consumer change and aim to measure consumers concerns and confidence gleaned from long-term surveys of consumer mindsets and viewpoints.

SCENARIO BUILDING

This practice builds hypothetical situations to simulate future circumstances, anticipating future possibilities and testing probable and improbable events.

CONSUMER TYPOLOGIES

This technique creates hypothetical consumer types in order to illustrate emerging characteristics tastes and behaviour. It is useful in offering fresh approaches to existing concepts in packaging, graphics, design, manufacturing products and communications.

MACRO TREND PACKAGES

Macro packages can be aimed at outlining a number of overall global trends that are key to future business. These services would be most useful to large organisations that need to plan investments in technology and take key decisions into the medium and long-term future, for example the automobile industry.

ANTENNA

Expert opinion, intuition and insight into emerging tastes from the creative viewpoint of a global network of individual people, offers cutting edge trend analysis reporting on innovation and emerging trends from around the world. Integrating traditional and electronic approaches to the process of forecasting, this type of service is essential to those in the vanguard of fashion design, publishing and beauty.

INNOVATION - MAINTAINING THE CUTTING EDGE

In unstable markets it is difficult for businesses and their brands to retain their authenticity, integrity and vitality; these consultancies advise their clients on maintaining innovation within their organisations.

ONLINE

Directional information based resources offer detailed trend information, rigorous research and analysis of patterns in demographics, economics, technology, politics, cultural attitudes and consumer behaviour. They present daily uploads, networked from around the world, covering design, architecture, interiors, retail, product, furniture, technology, fashion and culture.

EVENTS AND BRIEFINGS

Small scale to flagship conference activities are held regularly sharing latest knowledge and insights with clients, deciphering trends to inform a wide subject area from marketing, merchandising to fashion and product design. Additionally workshops, presentations and magazines supply the 'hottest' information weekly, quarterly and biannually.

FUTURE FOUNDATION

The Future Foundation - an international consumer consultancy.
www.futurefoundation.net

The following is an interview with Future Foundation.

The Future Foundation is an independent commercial think tank. Our work is strategic and future-focused. We advise clients on how to plan for the future by meeting developing customer needs. Our core competencies lie in understanding and forecasting social and consumer trends and analysing the extent and nature of their impact on consumer markets. Since its purchase by Experian Business Strategies in 2005, we have opened offices in France, Netherlands and Spain and continue to expand our international services.

The Future Foundation has wide experience in anticipating, understanding and forecasting changes in the way people live. Our analysis and forecasts are there to explain how the different forces - social, economic, technological, cultural and political - are shaping society, markets and the lives of individuals themselves.

Trends are systematically measured using a huge wealth of existing data and research built up over the past decade. This involves a comprehensive analysis and understanding of the present in terms of consumer attitudes and behaviour. When necessary we use primary research techniques to test and refine our propositions. Finally we aim to provide clear, action-orientated recommendations that anticipate and are in tune with future developments.

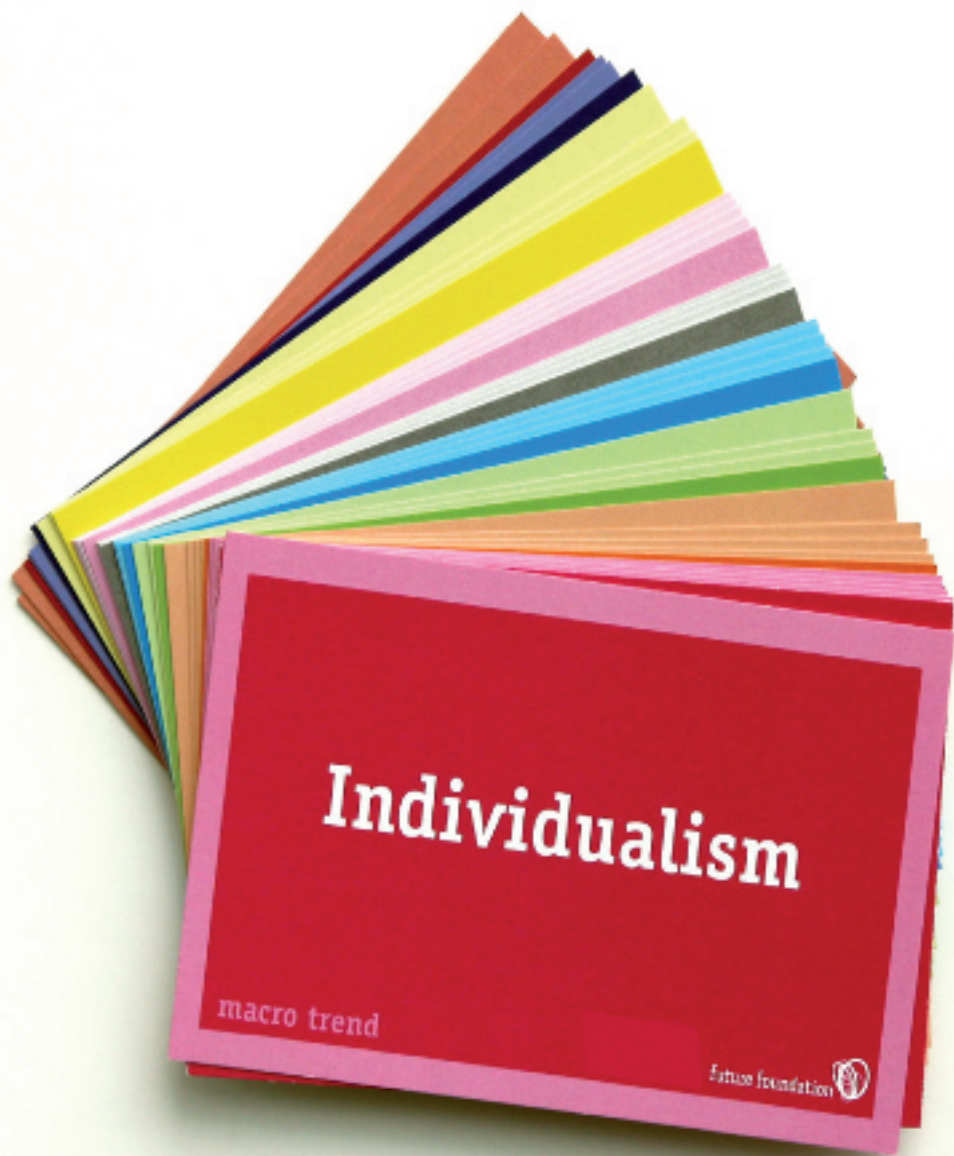
UNDERSTANDING CHANGING CONSUMER NEEDS AND BEHAVIOUR

We specialise in quantified and robust analysis of social and economic trends; clients can have confidence in our trends data as it is backed up by several years of proprietary quantitative research. Our research is carried out twice a year and covers over 20,000 consumers across Europe and beyond. This wealth of data, trended back over many years, gives us the ability to quickly draw together comprehensive contextual data and analysis that can form a firm foundation for any project.

OUR KNOWLEDGE OF ECONOMIC TRENDS AND WIDER DATA

Our parent company Experian provides us with a wealth of further data (e.g. socio-demographic segmentation tool Mosaic, TGI, Footfall, Mori, Forrester). We also have access to top economic forecast data through our link with Business Strategies, also part of the Experian Group, who specialise in modelling the current position and future prospects of local, national and global economies in terms of employment, output, consumer spending, investment, property and asset markets.

Our relationship with Experian gives us access to unparalleled data on different economies and markets across the world at a national, regional and individual level, a unique resource for our work. It also joins us to a team of over 300 researchers, analysts and consultants across the world.

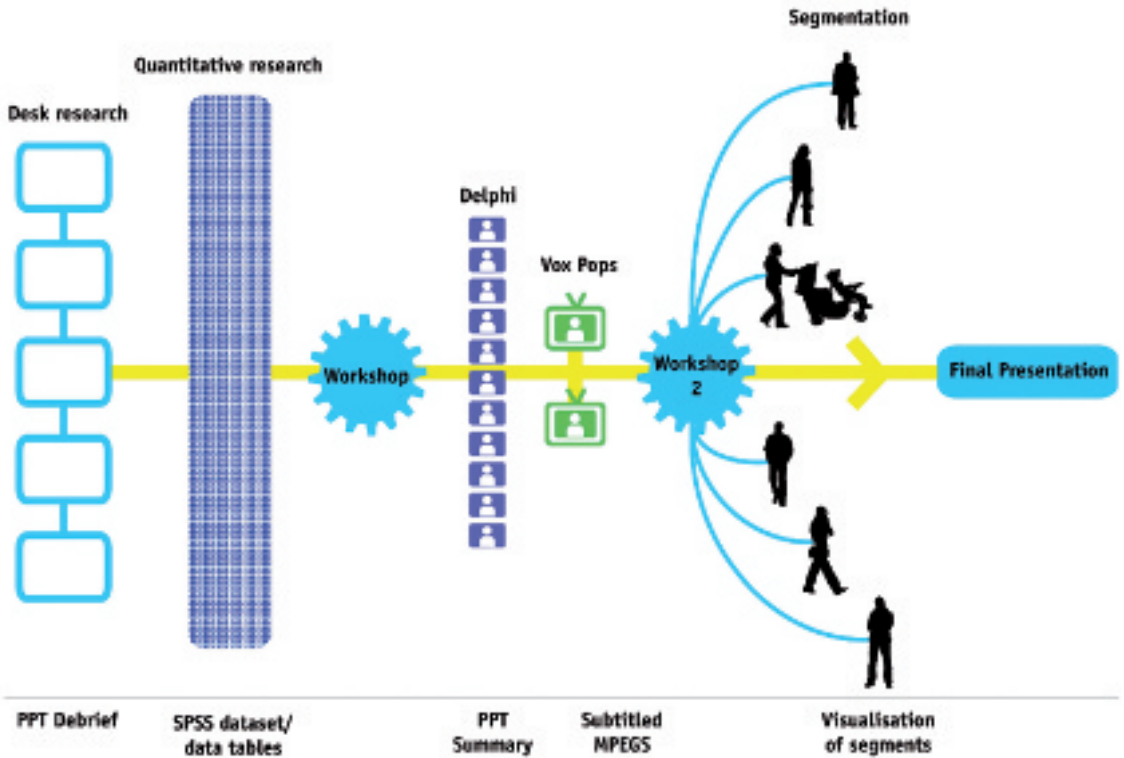


TREND CARDS

FUTURE FOCUS AND FORECASTING EXPERTISE

Thanks to our understanding and monitoring of trends, we understand why consumers behave the way they do. Therefore we are uniquely placed to anticipate and forecast behaviour from current attitudes and actions.

Our nVision service contains over 500 qualitative forecasts including technology take up, spending patterns, economic indicators as well as a range of key values and attitudes. We also produce bespoke forecasts on a regular basis through our project work.



PROCESS DIAGRAM FROM FUTURE OF ENTERTAINMENT CONSORTIUM PROJECT

**OUR BESPOKE DATABASE OF TRENDS
'nVISION'**

nVision is our knowledge database, an online delivery of trends, research, analysis and forecasts delivered via the Internet to around 150 corporate subscribers. In addition to our proprietary research, it includes more than 120 industry, government and academic sources, including Time Use and European Social Survey. As well as providing a unique knowledge of macro trends, nVision also delivers detailed data on particular target groups, countries or commercial sectors.

CONSULTANCY

We work with 60 companies per annum, in the UK and internationally, and on ad hoc consultancy projects ranging from strategy, marketing and

communications, innovation and new product development, future-proofing, forecasting, scenario planning, market mapping and thought leadership. The latter can be on specific issues or emerging trends, often providing distinctive platforms of communications activity. We use a wide range of techniques tailored to client requirements.

We take on specific consultancy briefs in areas such as forecasting, innovation and new product development, future-proofing strategy and market mapping. We also develop thought-leadership programmes on specific issues or emerging trends, often providing distinctive platforms for communications activity.



**TRENDEXPRESS WORKSHOPS WITH
CLIENTS**

EXTENSIVE USE OF QUANTITATIVE & QUALITATIVE RESEARCH AS A TOOL

As well as analysing our original proprietary research data from nVision, we often design original research programmes for clients covering all aspects of design, methodology, interpretation and communication of insights. We have expertise in a range of qualitative research techniques and often take an innovation approach to this type of research.

SCENARIO PLANNING FOR LONG-TERM FUTURES

Many of our clients are interested in long-term futures, generating insight which cannot always be as predictable as more medium-term forecasting and future planning. We therefore undertake scenario planning in order to help organisations imagine and plan for the future more effectively. The process highlights the principal driver of change and associated uncertainties and how they may play out in the future. We therefore present a range of possible future outcomes so that organisations anticipate, prepare for, or manage change.

MODELLING & FORECASTING

Through our own skill base and our contacts with other organisations we provide a range of powerful mathematical tools for addressing issues that are often not amenable to more traditional qualitative techniques. These include fuzzy clustering, non-linear modelling, agent-based modelling and Monte Carlo simulations. Discovering new segmentations to drive store location decisions (Woolworths), modelling household waste and electricity demands (Defra), the impact of exchange rate changes on spending by different nationalities of tourist (Historic Royal Palaces), the role and ideal pricing strategies for regional and national newspapers (Trinity Mirror) – these are just some examples of the work that we can carry out.

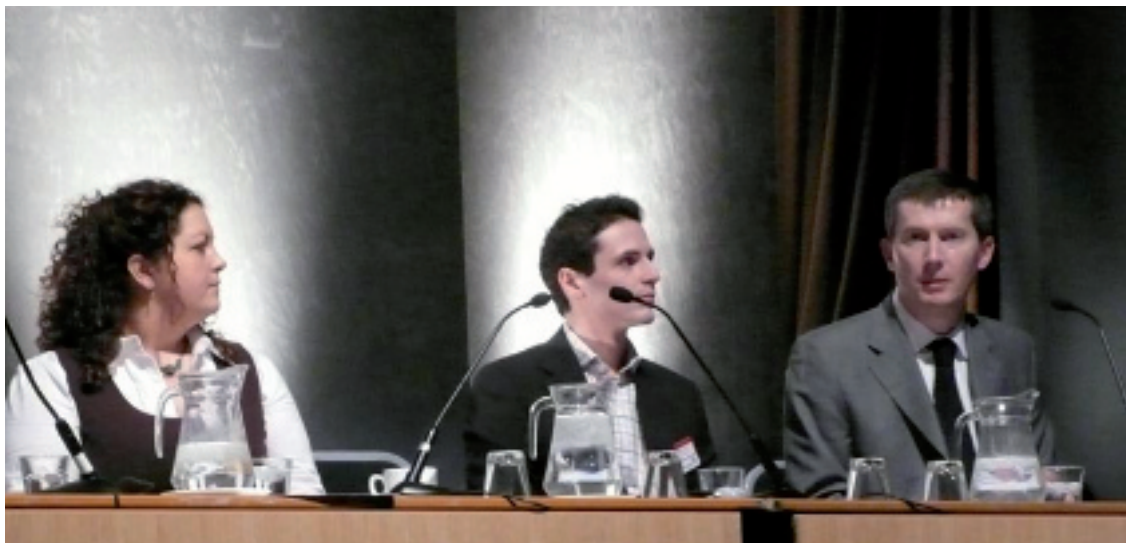
Recent forecasting projects include work for Listerine on the future of oral healthcare, the IPA – The future of agencies and advertising: a 10 year perspective, NS&I – 50 years of savings, Defra – The future of waste management.

VISUALISE

Another important facet of our business is our work on visualising key trends, bringing them to life in an engaging and meaningful manner. We recognise that visualisation of insight is key to their effective communication and we have developed a unique relationship with the Royal College of Art to create compelling and innovative visual communication tools.



OUR CHANGING LIVES CONFERENCE



OUR STATE OF THE NATION CONFERENCE



PHOTOGRAPHY FROM THE FUTURE OF CANTERBURY WORKSHOP

(WITH MAPS AND VISUAL AIDS)

FORECASTING & PRODUCT DESIGN CASE STUDY - THE AUTOMOBILE INDUSTRY

Creative intelligence applied to the automobile industry.

In examining the future of any product it is imperative to define its vision of the future. Forecasting companies are employed alongside market research to build a picture of both societal changes and an understanding of how the consumer engages with the product and the brand.

TRENDS DEVELOPING FROM SOCIETAL AND TECHNOLOGICAL CHANGE

The automobile industry has to plan many years ahead and therefore commissions reports covering all aspects of social change and technology. The relevant issues for them to consider would be economics, politics, society, demographics, resources and the natural environment, mobility and spatial development information, communication and knowledge. As the automobile market is now considered mature, high growth rates can no longer be expected in Western Europe; this coupled with pressure from traffic congestion, pressure on the environment and resources have forced individual manufacturers to decide what are the most significant factors in the development of new models to them.

Research has shown that although future society would be very mobile it will also be dominated by an ageing customer base; their findings showed that the three greatest trends in future society were: increasing social disparity, greater economic insecurity and a rise in crime and breakdown of social bonds.

Challenges that they would face in the industrial environment were that competition would increase and growth will almost entirely come from emerging foreign markets. The market would consist of a number of niches.

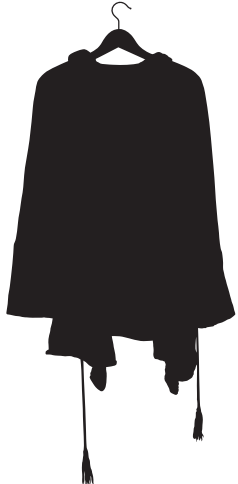


EMOTIONAL RESPONSE TO PRODUCTS

Car and product manufacturers are increasingly carrying out research on how consumers emotionally engage with their products. In terms of automobile design, knowing how important the relationship between a car and its owner is, creates interesting design possibilities, for example, many people name their cars. It has been shown that the expression that a car's headlights and grill form affects how people relate to a vehicle. 'Somatomorphism' is the term for the human inclination to identify with objects as if they were alive.

Research has shown that some people view their cars variously as cocoons, oases of calm, thinking spaces and picnic areas reminiscent of childhood; cars generally gave people a feel good factor. The sound of a car engine was found to be comforting, people also believed that the car they buy says something about them as a person. Research also showed that these underlying influences defined niche markets. If, for example, an ageing population has buying power, this will characterise the shape, colour performance finish and interior details of the final artefact.

In applying these principles to other product areas, forecasting companies are required to understand why consumers want to identify with certain brands and their values and in which ways people relate to the products themselves



TREND ANALYSIS COMPANIES:**THE FUTURE LABORATORY****www.thefuturelaboratory.com**

The Future Laboratory was established in 2001. It is recognised for its approach to trend forecasting, consumer insight and brand strategy.

The Future Laboratory have 3000 people in their 'LifeSigns Network' and have an in-house team of trend analysts and ethnographic researchers. They offer clients qualitative and quantitative insights into future consumers and how to target them. Clients in retail, technology, finance, automotive, food, fashion and creative industries have daily, weekly and quarterly news feeds, insight reports, analyses, strategy documents and brand personality audits to keep their brands on track.

FAITH POPCORN**www.faihtpopcorn.com**

Faith Popcorn is renowned for her trend development and books outlining lifestyle trends. She works under the name BrainReserve.

For over three decades she has provided new approaches to corporate positioning, strategic development, new products and the truth.

The company monitors the pulse of culture as it shifts and helps clients to ensure that their brand remains culturally relevant for the future by referring to the trends.

TRENDWATCHING**www.trendwatching.com**

Trendwatching was established in 2002 and has its headquarters in Amsterdam, the Netherlands.

Trendwatching is an independent trend company, scanning the globe for consumer trends, insights and related business ideas. They have a network of 8,000 plus trendspotters in more than 70 countries.

Their findings are disseminated in a free, monthly trend briefing, which is

sent to 160,000 plus business professionals in more than 120 countries. Their trend findings help marketers, CEOs, researchers and anyone else interested in the future of business and consumerism, to develop new products, services and experiences for and with their customers.

HENLEY CENTRE/HEADLIGHTVISION**www.hchlv.com**

Henley Centre and HeadlightVision merged in 2005 to create a business with a strong base of global trends and futures insights, as well as with offices on three continents.

They are a consultancy that is led by intelligence and research. Through a combination of creativity and rigour, they 'unlock' insights through their products that shed new light on issues and empower their clients to act upon them.

Their intelligence sources offer insight into changes in consumer behaviour and motivations worldwide. They offer information in: Organising and Embedding Trends; Scenarios & Futures; Modelling & Forecasting; Future-facing Qualitative Research; Future-proofed Segmentation; and Insight-led Innovation.