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THE DIGITAL REVOLUTION WITHIN COLOUR TREND FORECASTING

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ABSTRACT

COLOUR FORECASTING; THE PREMISE SOUNDS SIMPLE: CREATE A RANGE OF NEW COLOUR PALETTES EACH SEASON FOR FASHION AND TEXTILE PRODUCTS. HOWEVER, THE TREND FORECASTING INDUSTRY TODAY IS FACING A REVOLUTION AS THE DIGITAL ERA RESHAPES THE LANDSCAPE AND NEW PLAYERS ENTER THE MARKET AT AN EXPONENTIAL RATE.

Colour forecasting can be defined as the 'selection of ranges of colours that are deemed as those that will be wanted for a particular product/market at a particular time' (Wilson et al 1999: 18). The origins of colour forecasting can be traced back almost a century to 1917 when the Textile Colour Card Association of America (TCCA) released their first publication. It featured 40 colours presented in silk and wool swatches, physical samples, which users could carry with them for colour reference (Hope & Walch 1990). Today's forecasters still present a similar number of colours each season and until recently physical colour samples were the norm. However, colour is now being conveyed increasingly in digital format, carried around on a mobile phone or tablet. The contemporary trend forecasting industry was

worth an estimated \$36bn in 2011 (Barnett 2011). Trend information and predictions are used by designers and buyers in a range of diverse creative industries, where it was traditional for forecasters to communicate with their clients primarily through printed materials. Each season, new colour trends are published providing seasonal themes and colour palettes suitable for a variety of markets and demographics. In recent years, trend services have developed online; their impact is immediate with global availability and regularly updated content (Petermann 2014).

The Internet and mobile devices have created a new approach to forecasting in the last decade, with established forecasters and newcomers developing apps which are changing the way colour is communicated. For example, Adobe Colour is an 'app' that instantly creates a colour palette from an image. In parallel, those working within the fashion industry are changing. Millennials, known as generation Y, born between 1981 and 1999, now number over 70 million in the US alone, and they have very different priorities and working practices to previous generations (The Doneger Group 2012). Millennials are partly responsible for driving the change as they demand instant information available on a 24 hour basis via blogs and fashion news apps, all leading the change in the way trend information is gathered and published, through the Internet, blogs, and live streaming (Gaimster 2012).

Throughout these paradigm changes, users have continued to purchase trend books, attend trade fairs and colour seminars. This may relate to the disparity between colour as portrayed on screen compared to colour as it appears on paper or fabric, which can be substantial. Limited control over local user screen brightness or calibration can distort the true colours

being portrayed as Gaimster (2012) identified:

A lack of quality control, the focus on the visual over the senses, the ease of access of information leading to a lack of respect for that information and the sheer volume of information.

(Gaimster 2012: 176)

This paper explores the use of new technologies and mobile devices for communicating accurate colour and creating colour palettes. Furthermore, the paper questions the role of the colour forecaster in the new digital environment.

THE CURRENT MARKET

Colour forecasting permeates all aspects of consumer lifestyles in today's society, from cosmetics to cars, sofas to shoes. According to the Executive Director of the Colour Marketing group (CMG) Jaime Stephens: 'Research shows that something like 65% of a consumers purchasing decision is based on colour and packaging' (Brannon 2010: 21). In fashion the same is true: a garment style may sell well in one colour but not another; such mistakes can be very costly to a retailer. Decisions regarding colour selection in fashion and textiles are often made many months or years ahead of the season and can drive the range planning process. Colour has traditionally been one of the first building blocks in the development of new ranges, taking precedence over other activities. The directions for colour would typically have been taken from forecasts presented by commercial colour forecasters, at trade shows, or from fibre companies.

Mete (2006: 278) states: 'Colour is usually the starting point of each season and often acts as a springboard for materials/ fabric direction and trend research'.

THE INTERNET AND MOBILE DEVICES HAVE CREATED A NEW APPROACH TO FORECASTING IN THE LAST DECADE, WITH ESTABLISHED FORECASTERS AND NEWCOMERS DEVELOPING APPS WHICH ARE CHANGING THE WAY COLOUR IS COMMUNICATED.

However, a new wave of trend and colour forecasting has emerged since these comments were made with established forecasting companies and newcomers developing a range of apps that are changing the way colour is communicated and used by the fashion and textiles industries.

A new group of buyers and creatives are working within the fashion industry today. Generation Y are driving digital changes to traditional working practices, eschewing the usual ways of working such as books and physical colour swatches. Now, they can access colour trends and develop their own palettes 'on the go' using a tablet or smart phone. These multichannel working practices raise questions about: the accuracy of colour communication when seen on a variety of mobile devices; and the views of forecasters who spend time developing trends with traditional materials such as paper and cloth.

Colour forecasting is still very much an essential part of the fashion industry, as described by colour expert Kate Smith:

Colour plays such a critical role in the success of a product or brand, and so many companies are in need of a strategy based on solid colour knowledge.

(Scully & Johnson Cobb 2012: 14)

While forecasters have been moving away from the traditional printed formats for some time, printed books are still popular, as many prefer to view colour that is printed either onto paper or textiles. Despite this, there is undoubtedly a move toward accessing information in a range of different formats, facilitated by mobile technology. Users are looking for information and inspiration in an increasingly fast paced fashion industry and are no longer content to wait for a book to be published.

The internet and online trend services have expanded exponentially in recent years and with the rise of the fashion blogger, there are more information sources available than ever before (Scully & Johnston Cobb 2012).

THE RISE OF THE BLOGOSPHERE AND IMPACT ON TRENDS

Scully and Johnston Cobb (2012: 58) recognised: 'the advent of the internet has radically altered colour forecasting and trend development in the twenty first century' with blogs a key part of the change to the business. According to Rickman and Cosenza (2007) there were 35.3 million blogs in 2007, doubling every 6 months; a trend that had been consistent for the previous 36 months, with fashion blogs accounting for at least 3.8 million sites alone. By 2011, Royal Pingdom suggested the number of blogs had risen to 152 million overall, and the number of fashion blogs continues to grow. Some blogs, such as In:color and Colour Lovers also bring immediate reaction and daily views on colour related to fashion, interiors and product design. Blogs such as these can be a valuable addition to the forecasters' range of information gathering. In 2009 Kaplan and Haenlein concluded that businesses could benefit from using social media such as, twitter, facebook and additional apps but they should be aware of risks involved in such platforms as new marketing approaches were developed. Around this time, Royal Pingdom (2011) estimated there were 5.3 billion mobile handsets, with 1.3 billion of those being smartphones. The popularity of smartphones and tablets have helped to expand the reach of blogs and the development of apps, allowing users to access information at any time of day, at any place in the world.

Concurrently, fashion trend information is being published earlier than ever before due to the increase in the number of blogs and fashion news apps; this has led to a change in the manner trend information is gathered as well as published, through the Internet, blogs and live streaming, with major brands such as Burberry choosing to live stream their catwalk shows (Gaimster 2012). Immediate and open access to fashion trends is naturally impacting on consumer awareness with high profile bloggers such as Susie Bubble (Style Bubble) and apps such as Trendstop and the Sartorialist, all easily available to consumers and industry alike. Stylesight launched apps aimed at industry users in 2011, the first, Styletraveller, provided information on cities to help the user plan their trip, with features including Google maps and shopping highlights. Another example, The Stylesight News app, features news from the main site. In an interview with Ben Turedi from Stylesight in April 2013, prior to their purchase by rival online trend forecaster WGSN, he indicated the company intended to launch the mobile version of their website for smartphone and tablet users: 'We are using the technology to take it to the next level, for collaborative working, more integrated design solutions'.

Maintaining a competitive, yet profitable industry is perhaps the greatest challenge to the long established trend forecasting industry, when potential customers can access a large amount of information free of charge via new apps and blogs. Other negative aspects of new multi-channel ways of working include how accuracy can be maintained. The digital representation of colour is a particularly difficult issue that few organisations have tackled to date.

COMMUNICATING COLOUR DIGITALLY

Communicating accurate colour via mobile and tablet devices poses a broad range of inherent technical problems. Colour specialist Pantone launched their first app in 2011, allowing users to identify colour references when out and about by simply photographing an object on their smartphone and uploading the image through the app. In 2014, Adobe launched Colour CC allowing users to sample colours around them and create instant colour palettes that can be exported to other Adobe software including Illustrator and Photoshop. With a colour wheel and RGB colour sliders, users are able to adjust the colours or simply use pre-set colour palettes. All of these can also now be shared via Facebook, Twitter or by email without the use or need for colour referencing. These apps illustrate methods by which colour is being used and addressed via apps. However, some are not as strict regarding the accurate depiction of colour as Pantone, who have their own colour reputation to protect.

One of the key elements when considering the rise in use of digital colour images is consistency of the colour throughout the supply chain. Some systems, such as Pantone, strive to do this via their colour matching systems. However, according to Setchell (2012) around 20% of colours cannot be produced using certain devices including a computer screen or traditional CMYK colour printer. In addition, blues displayed on screen cannot be accurately rendered on paper. With such fundamental issues in colour reproduction from digital sources, how is the user to accurately reproduce digital colour palettes from such sources?

Published trend books, which for decades were the only source of

commercially produced colour forecasting information, would always reference colour using a number of established colour referencing systems. References in the form of a combination of numbers and letters, would be guaranteed to depict the same colour to a user in the US or the Far East who had the same colour management system to refer to. These were said to represent the vast majority of colours that could be printed onto paper or dyed on to fabrics, so users could place confidence in the system. If up to 20% of colours today cannot be accurately depicted digitally, then perhaps the new way of working is not as accurate as the producers of the information would have us believe.

In 2014, during a previous study, the author surveyed two groups of second year fashion design degree students. One group was from the UK and one from Hong Kong. When students were asked about their preference in accessing trend information, UK student response indicated almost three quarters of those surveyed found either online subscription or free information sites the most useful when looking for trend forecasting information, with few accessing mobile apps for trend information and almost 20% citing trend books as the most useful sources of information. In comparison, students from Hong Kong found almost the same amount of online trend forecasting information most useful, but far more used a subscription site, provided by their institution. Considerably more students from Hong Kong used mobile apps to access trend forecasting information. The use of printed trend publications was far smaller in this group, with less than a sixth of Hong Kong students selecting this method of information as being most useful. The findings indicated that the new generation of users have very different priorities across the globe, with the Hong Kong

students preferring digital versions of trend information. In a follow up question both groups were asked: if they had used online or multi-channel trend information, why did they decide to use the format? The results were relatively evenly spread for the UK, with slightly more students suggesting that 24-hour access was a deciding factor in selecting online information. However, almost 15% more students from Hong Kong selected the downloadable option as the deciding factor when using digital versions of forecasting materials, perhaps due to their increased overall preferences for using digital information sources. These students will be the next group of graduates to influence the fashion and textiles industry, who have accessed apps and online trend services via their mobile devices and tablets, created images and recoloured them automatically on their devices, uploading them to Instagram, Pinterest and allowing friends to judge their work. It has become easier for ordinary users to take professional looking images than ever before, then to extract colours from them using apps such as Adobe Colour.

FUTURE DEVELOPMENTS

The trend forecasting industry has adapted to the demands of new technology over the years: Peclers launched a CD with their trend books in the late 1990's; websites began to offer some current information around 2000; and the first acknowledged trend website, WGSN, was launched in 1998. Founder Marc Worth had little competition for the first 5 years of the site's operation, building up a global customer base of over 1500 clients by 2005 (Zannoni 2012). With an increasingly competitive market, the forecasters cannot stand still and with digital media their main platform, colour communication is still a key area being addressed.

In an interview with the author in 2015, Aki Choklat, Creative Director at Trendstop, discussed his belief that as we spend so much time in digital reality environments, we have started to judge the 'normal' reality based on the digital standard. The inherent problem with digital colour, coming from a light-emitting source, such as a monitor, tablet or mobile phone, is that colours will naturally look brighter. As mentioned previously, 20% of colours on screen cannot be reproduced accurately by a printer either on paper or on fabric, so what is the answer to this? Choklat believes in reverse engineering the design development processes to return to where we were before the advent of digital colour. During the same 2015 interview, Choklat stated:

I always start playing with materials and then try to work backwards to try to find digital equals. I don't think there is a solution that will solve the problem but I do think we cannot be seduced with digital colouring and then forget the real colour.

These comments potentially raise questions linked to the teaching of trend forecasting today; are academics encouraging students to use digital representations of colour to the detriment of hard copies and more traditional approaches using fabric or yarn swatches? The survey of British and Hong Kong students suggests there may still be room for both approaches in the UK, but that in Hong Kong, students are far more likely to access and use digital trend forecasting information.

CONCLUSION

Creating and disseminating colour palettes for fashion and textiles did not fundamentally change until the advent of the first online trend

services and the presentation of ideas via the Internet in the late 1990's. Research illustrates the pace of digital communication increased again with the advent of smart phones in the mid 2000's and the concurrent rise of the fashion blogger and apps dedicated to fashion trends that were launched by major online forecasters, such as WGSN and Stylesight. Despite increased technological advances, calibration and optimisation of colour management systems and printers, it is still not possible to guarantee accurate colour representation between one screen, digital colour, and that which is printed onto a substrate. Experts suggest that up to 20% of colours viewed on screen cannot be physically reproduced at this moment in time, yet increasingly, students and the industry are using digital imagery to develop their colour concepts with little control over the final output.

Future research should be focused on how the missing 20% of colour can be faithfully represented, teaching students how to responsibly use digital imagery, and understanding the fundamental underlying issues surrounding colour emission and colour absorption when dealing with digital and printed colour. Returning to the classroom, there may be value in ensuring students work from the practices hark back to the days of the original TCCA colour forecasts and the use of fabric swatches. It appears to be too early to discard the original tools of the colour forecaster just yet, if the industry is to maintain colour accuracy in both the digital and real worlds. There is clearly a need for colour forecasts and as such a way forward must be found to address any colour discrepancies that may arise in the digital communication of colour in the future.

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