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## **The Colour Conspiracy:**

### **A Summary of Colour Forecasting in the Textile & Clothing Industry and its Influence on Future Predictions for a UK Mail Order Company**

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#### **ABSTRACT**

Colour is one of the most complex and difficult variables which marketers have to contend with when forecasting, planning, presenting and managing ranges of fashion goods. This paper aims to contribute towards a greater understanding of some of the factors that influence decisions about colour forecasting within the textile and clothing industry. A variety of colour forecasting services are available to aid designers and buyers in colour selection. However, the earlier the colours are predicted, the more expensive the service tends to be.

In the case of a leading mail order company, how useful are these services? Do they aid colour selection or are they an unnecessary expense? What are the risks of selecting the wrong colour? These questions and many more shall be addressed by looking at how a leading mail order company selects their colour palette for a season.

#### **INTRODUCTION**

The final colour of a product on sale to the consumer is the end result of a complex interaction of knowledge, guesswork, practical constraint, and marketing skill. Once the final colour is chosen, most of the problems associated with delivering the colour selected, under precise colour definition and control at a reasonable cost, have been solved. Technical colour management is well served by accurate measurement and colour manipulation tools and is founded on tried and tested science. By contrast, those managers whose responsibility it is to deliver successful colour selection have to rely on general principles and have few tools and measurement techniques to call upon. Costs of badly made colour decisions can be catastrophic, resulting in a loss of sales. This is a particular problem for mail order companies who are unable to rectify the situation once the catalogue has gone to print. However, even for high street retailers, selecting the wrong brightness or chroma for a product may lead to losing market share to competitors who have managed to achieve the right balance of colours.

Many researchers around the world are now recognising the importance of colour in order to reach increasingly sophisticated customers on a deeper level. From the careful observation that 'emotions can be stirred by colour'<sup>1</sup> to the more dramatic claim that 'whoever controls colour, controls the world'<sup>2</sup> it has been argued that 'when colour has a specific, predetermined function that acts to support the overall strategy, your marketing effort can do all you've designed it to do'<sup>3</sup>.

## Colour and the Consumer

Colour has an important affect on consumer behaviour. It is well known that certain colours elicit feelings of excitement and other colours are considered restful and can make people feel tired. The effects of various colours on consumer perceptions have been widely studied. Table 1 lists a number of colours and their common perceptions as well as examples of marketing stimuli that have utilised these colours to elicit certain perceptions.

**Table 1: Common Perceptions of Colours**

Colour	Perceptions	Marketing Examples
Red	Powerful	Coca-Cola
	Dangerous	Fire Extinguisher
	Exciting	
	Passionate	
Green	Cool	Gillette “sensitive skin” shaving gel
	Calm	Healthy Choice food products
	Natural	
Blue	Cool-cold	Phillips’ Milk of Magnesia laxative and antacid
	Sad	
Black	Respectful	Brut Aqua Tonic after shave
	Cold	Mont Blanc pen
	Prestigious	Johnnie Walker Black Label scotch
Clear	Sophisticated	
	Clean	Palmolive Sensitive Skin dishwashing liquid
	Pure	Seltzers beverages

Source:4

Psychologists have discovered that merely by looking at different colours, blood pressure can be altered along with heart rate and rate of respiration<sup>5</sup>. When somebody approaches from a distance, the first thing we see is the hue of his or her clothes. The nearer the wearer comes, the more space this hue occupies in our visual field and the greater the effect on our nervous system<sup>6</sup>. The lower the chroma of the colours the less intense the effect. The differences can be noted when the colours are described as clashing or soothing. Partly for this reason, certain dress codes have evolved.

At one end of the light spectrum, colours with long wavelengths; reds, oranges and yellows, tend to elicit warm feelings in consumers. An example of a marketing application is the bright red seats that are found in many fast food restaurants. These establishments want to move customers quickly through the eating process. Bright colours encourage fast movements; consumers perceive the seats to be warm and tend not to linger. Short wavelength colours such as blues and greens are associated with coolness and encourage slower movements. The seats in an expensive restaurant are more likely to be blue or green to promote a more leisurely dining experience. However, there is also research that indicates it is not the colour, but the shade that is important in terms of evoking feelings of warmth or coolness<sup>7</sup>.

The effects of colours on the psychological state of the individual should also be considered, because some colours act as a stimulant while others act as a depressant. A dark blue ceiling may appear to be refreshing to begin with, but in time the perceived coldness may become an irritant. Psychological effects of different colours on the individual are tabulated in Table 2.

**Table 2: Psychological effects of different colours**

<b>Colour</b>	<b>Psychological Effect</b>	<b>Temperature Effect</b>	<b>Distance Effect</b>
Violet	This colour can make the individual feel aggressive and tired	Cold	Very close
Blue	A feeling of restfulness is often an affect of using this colour	Cold	Further away
Brown	Excitement is associated with this colour	Neutral	Claustrophobic
Green	This can be a very restful colour	Cold/neutral	Further away
Yellow	Excitement is associated with this colour	Very warm	Close
Orange	Excitement is associated with this colour	Very warm	Very close
Red	This colour can be very stimulating	Warm	Close

Source: 8

Colours have different connotations and traditional uses across cultures. In Southeast Asia, light blue symbolises death and mourning and Pepsi-Cola lost its dominant market share there to Coca-Cola when they changed the colour of their coolers and vending equipment from deep “regal” blue to light “ice” blue. It is therefore important that companies are aware of the different associations that people have with certain colours<sup>9</sup>.

Colour has come to dominate the textile and fashion industry; research work carried out by yarn and textile manufacturers, fibre producers, retail groups and trade fair organisers consistently shows that the first response by a customer, whether textile buyer or shopper, is to colour<sup>7</sup>. This is followed by an appraisal of design, then touch and finally price. Therefore, it is the colour palette that is produced before anything else each season. It is colour that dictates the mood of a season.

## **AIMS & METHODOLOGY**

The aim of this research is to develop a greater understanding of the processes involved in colour prediction and decision-making within the textiles and clothing industry. The paper will look at information currently available on colour forecasts and how it can be interpreted and filtered through the industry. Colour forecasting is a particular concern for mail order companies largely because of the high rate of product returns received as a result of colour related problems.

Semi-structured interviews were conducted with 10 companies within the textile and clothing industry. These included colour consultants, fibre suppliers, manufacturers, retail organisations and design professionals. Information was gathered from trade shows such as Premiere Vision, conferences including Design Foresight and from secondary sources such as trade magazines. The aim of the research was to investigate the colour decision-making process within the textile and clothing industry. The interviews covered the following main issues:

- **The Development of Colour Forecasting** – to gain greater insight into the development of colour forecasting in the UK market.

- **The Timescale of Colour Decision-Making** –from the initial concept of a colour palette through to the consumer, analysing the information used by companies at different levels in the supply-chain.
- **Information Sources** – to analyse sources of inspiration available to companies in their colour decision-making process.
- **Cost of Information** – to investigate how much money companies are prepared to pay for colour forecasting information
- **Interpretation of Information** – to look at how companies make use of the information available to them for their particular sector.

Each interview lasted for approximately one hour and the interviews were recorded with the consent of the interviewee and were then transcribed. The findings are presented in order of occurrence in the retail season, starting with international and national colour meetings through to the retailers and consumers.

## **FINDINGS AND ANALYSIS**

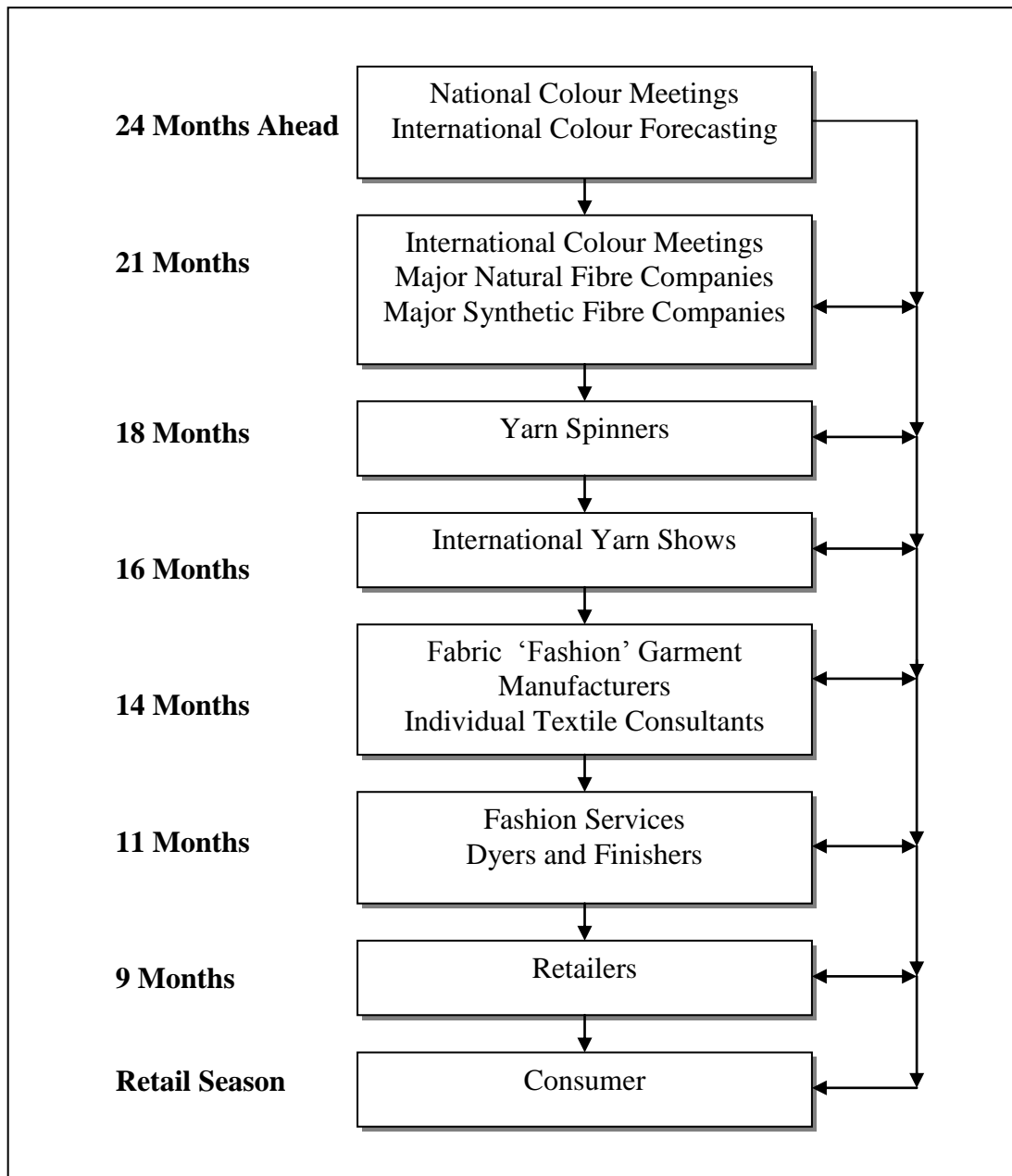
Colour prediction involves attempting to forecast the principle colours consumers will demand during a future retail season. There are many forms of colour prediction services; colour forecasting companies publish seasonal books of forecasts, trade shows for different areas of the textile trade offer colour palette predictions, consultants also tailor colour prediction information particularly for specific customer needs. Many company designers and colourists will compile their own colour ranges, which they will then offer as a service to their customers. Trade publications are sent press releases from these and other services to be published in season-specific colour direction guides. Trend seminars are also held by various organisations as additional design aids.

## **THE TIME SCALE FROM CONCEPT TO RETAIL**

The period of development for forecasting colour and fashion trends from the initial conception of ideas to the garments retailing in the shops is approximately two years. This time scale has been arrived at by the industry as a result of the length of time required for yarns to be produced and dyed, fabrics manufactured and finally garments produced ready for the retail season. The process begins with the supply of information from colour prediction groups to those involved in manufacture and production; yarn manufacturers require trend information 18-20 months in advance of the season, fabric manufacturers require the yarn colour information at least 15 months in advance of the season and the garment manufacturer requires 9 months prior to the date of retail launch.

Figure 1 illustrates the time scale of the major national and international forecasting services and their influence on manufacturers.

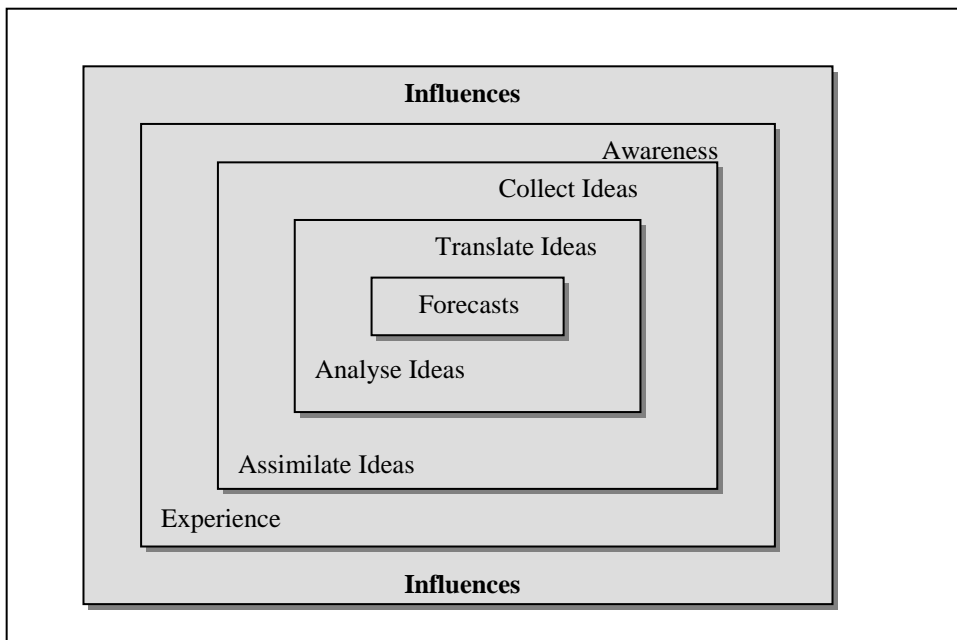
**Figure 1: Timescale of Forecasting Services**



Source: Adapted from 10.

In predicting future trends, consumer moods, the political and economic climate, global trends, environmental issues and technology should all be given proper consideration, along with many other influences. Forecasters need to be globally aware and constantly absorbing the world around them. Figure 2 is a simplified diagram highlighting the key elements of trend and colour forecasting methodology.

**Figure 2: Methodology of Forecasting**



Source: Adapted from 11

## **NATIONAL & INTERNATIONAL COLOUR FORECASTS**

### **International Colour Authority**

The first International Colour Authority (ICA) forecast was launched in September 1968. A panel consisting of 30 of the world's most experienced colourists and designers gather every six months to discuss colour information for the ICA forecasts. Decisions are made on directional colours for womenswear, menswear and furnishings. Published 22 months ahead of the retail selling season, the impressive ICA portfolio is highly regarded by the industry as the earliest colour predictive service.

Various different methods are employed to source colour ideas and influences on colour can come from practically anything. Ideas may come from society, from moods of the times and even what is happening in the world politically and on the street. The colourists come together from all over the world and are of various ethnic backgrounds. This is a deliberate decision to ensure the global validity and scope of the group.

Until the final stage, all the information discussed and compiled by the panel is kept secret. Even after this stage, subscribers pay such high fees for their copy of the predictions that they rarely discuss the results. After all, their aim is to put the customer one step ahead so that their final products will be the ones that sell well. The prediction manual consists of clear styling diagrams, colour mood boards, colour palettes and fabric swatches. Key colours and accents are presented with images and collages to reflect the feeling and atmosphere of the season. Colour palettes are intended to allow individual interpretation by buyers and manufacturers.

### **Design Intelligence**

Design Intelligence is a London based design service forecasting colour, yarn, fabric and design trends using a similar method to the ICA. The group caters for an international market and publishes results every six months. The success of Design Intelligence lies in the fact that

the service is applicable to all types of manufacturer, whether large or small. Products are costly but the information supplied is detailed and relevant.

### **Carlin International**

Carlin International is a Paris based colour-forecasting company whose publications carry a similar amount of information and are comparable in cost to Design Intelligence. The colour-forecast books are available 16 months ahead of a season.

There are several other colour forecasting publications including 'Modatessuto' and 'L'Officiel de la Couleur et Textiles' who provide trend information for textile companies.

### **TRADE SHOWS**

Colour predictions for trade shows are devised on similar principles and for the same purposes as colour forecasting publications. They tend to cater for the needs of buyers rather than designers. The colours predicted and published generally act as a form of confirmation of colours predicted by colour consultants and colour prediction publishing companies earlier in the season.

With the exception of one show, Premiere Vision, the order in which shows take place is dictated by the textile supply chain, i.e. beginning with fibre shows through to garment shows. Premiere Vision is a show that takes place ahead of any other trade show. This is where many designers come to choose the fabrics for their new collections. For many designers, there is a fear of being left out in the cold, so they listen to the forecasters, anything that can help to guarantee that a colour is going to be strong makes them feel less nervous. There is nothing worse for a designer to think that they have no idea if their product is going to sell or not. So they try to reduce the unknowns as much as possible. This is not to say that all fashion designers are like sheep, of course. For an avant garde designer such as Antonio Berardi, trends are to be avoided at all costs. They like to be one step ahead of the rest of the industry.

### **Fibre and Yarn Shows**

There are several international shows held every season, such as Expofil which is held every six months in Paris, two months ahead of other fibre and yarn shows. Pitti Filatti is held in Florence with exhibitors representing leading yarn spinners for knitwear and the major fibre producers. At Yarn Collections (formerly the British Yarn Show) exhibitors are knitting yarn producers and fibre producers.

### **Fabric Shows**

Premiere Vision is a fabric colour prediction show held in Paris a year ahead of the retail season. The colour areas agreed by the Premiere Vision consortium are shown in trend areas at the exhibition with additional regular audio-visual screenings for those wishing to attend. These audiovisuals are usually accompanied by a magazine that helps to encourage the ideas that have been highlighted.

Interstoff is another fabric show, held in Frankfurt and lasting for three days. As with Premiere Vision, the trends are displayed in specific areas and act as confirmation on colour directions for designers.



## **Garment and Fashion Shows**

There are numerous garment and fashion shows held every season that include information on future colour directions. A notable garment show for women's apparel is Pret a Porter, held every six months in Paris. Salon European de l'Habillement Masculin (SEHM) is also held at the same time in Paris. These shows are large and extremely popular with European manufacturers.

While these shows are essentially directed towards buyers they are also useful for designers wishing to gather colour and styling trend information and observe the sales progress of the different lines.

## **COLOUR CONSULTANCIES**

Colour consultancies produce colour forecasts and trend guides for customers in a variety of product areas. Their function is to interpret the information and often to tailor colour ranges previously offered by colour forecasting publishing companies to narrower and more applicable colour stories for their client's individual product area.

Generally, consultancies form a fairly new and specialist group within the design industry. They are increasingly engaged in assisting manufacturers' in-house design teams to bring an objective approach to the selection of colour, in order to enhance the sales potential and perceived value of their products. As a relatively recent addition to the consumer product industry, their role in the design process is often not entirely clear.

Promostyl is a styling bureau and colour consultancy. Although it is based in Paris, it has over 20 branches world-wide. 80% of Promostyl's business is done outside France and although the ideas are compiled at the head office in Paris, they are gathered from all over the world. Promostyl is not just concerned with individual clients, they also produce fashion styling and colour forecasting books.

The colour directions are obtained, as ever, from numerous different sources. The fees commanded by these agencies are substantial, prompting debate over the issue of the accuracy of the process of predicting future demand for colours. While there can be no guarantees, careful research into the relevant market sector and an awareness of design and colour trends alongside new technologies assures the acquisition of an invaluable database. Combining this data with creativity and an intuitive sense of the colour directions gives rise to a reasonable air of confidence. While one colour consultant has opined that they do not always get it right<sup>12</sup>, another company specialising in colour research has a more optimistic view, "We research reactions not just to primary shades but to tone and texture. On the basis of our tests, we can forecast sales of colours of a new product with at least 90% accuracy."

## **INDEPENDANT FORECASTS, TRADE SEMINARS & MAGAZINES**

In 1931, a British Colour Council (BCC) was set up, consisting of various colour experts who generally were individual representatives from British companies. The function of the BCC was to provide seasonal colour predictions. In 1974 this collapsed and in 1976 the British Textile Colour Group was formed. Their procedures were akin to those of ICA, but they worked 28 months ahead of the retail season. The final result was colour forecasting that was multi-national and therefore extremely marketable.

Trend seminars are another source of colour information. There are several organisations that hold such seminars in various market sectors, these include the International Wool Secretariat

and The British Knitting and Clothing Export Council. The seminars were established to assist UK manufacturers to research the fashion elements of their range for their internal and export markets.

Trade seminars not only attract representatives from the retail sector but also delegates from other sectors of the textile industry including fibre producers and yarn, fabric and garment manufacturers. The presentation concerning colour and styling trends is highly detailed and provides a sound basis for each seasons' range. Despite the high level of detail and quality provided in such seminars, the cost is far more reasonable than using some of the colour forecasting publishing companies, colour consultancies and trade shows.

Many companies subscribe to trade magazines, which carry features of reliable trend information. Although the reports come at a much later stage than initial colour forecasts, they are an important method of confirmation of colour ideas at a fair price.

### **TODAY'S CONSUMER**

The consumer is the final link in the process of colour forecasting and essentially the most important. The role of fashion and its importance to the consumer has changed dramatically over the past decade. Designers today are designing for a world that is bursting with social, political and ecological upheaval. After the conspicuous consumption of the 1980s, the key issues for the consumer have been based on traditional values, such as authenticity, quality, commitment and service. Individuals now seek more control over their lives, greater value to the things they do and more personal freedom. Today's consumer is less motivated by money and material possessions, the status symbols of the 1990s. Today's consumer has changed and become more discerning, confident and able to make their own judgements and individual decisions concerning fashion messages through the media<sup>13</sup>.

“We are no longer trying to attract attention so we have a different idea of status. Today luxuries are for yourself and not just for the outside world. It is more about expressing their values for themselves.”<sup>14</sup>.

To quote from D. Shah in Expofil News “We are entering a period of new ethic awareness. The consumer is going to look at a company he is buying from and ask ‘Is this an honest company? Does it make quality merchandise? Is it charging me a fair and honest price for what I am buying?’ It is not for nothing that more retail stores are getting increasingly involved in charity work and fundraising.”<sup>15</sup>.

### **METHODS OF COLOUR FORECASTING USED IN INDUSTRY**

Our research shows that different areas of the apparel industry choose the palette of colours for a range of products at various times. The further up the supply chain, the longer the time scale needed to decide on a colour range. In-house designers usually choose colour ranges. In numerous situations, the designers collaborate with buyers and sometimes the sales division to reach the final verdict. Colour consultants are used, particularly within garment manufacturing, to provide additional confidence and create the best chance of accurate colour forecasts. Specific forecasting publications are reported to be of great help to these teams, in particular the designers. However, it is somewhat surprising that, with the exception of fibre producers, an overwhelming number of companies do not use them<sup>10</sup>. Other sources are used as inspiration, possibly due to the cost of subscribing to these publications. A less expensive way of viewing predicted ranges is by subscribing to trade magazines. However, these are produced too late for companies such as mail order companies.

Many colour ranges are published as reference for designers. Evidence exists to show that companies throughout the UK textile industry use more than one source of inspiration for colour forecasting at any one time<sup>11</sup>. Increasing the amount of input reduces the chance of getting a shade wrong. As a direct result of the decrease in the chance factor there is a higher prospective profit. Companies generally feel that it is important to spend a great deal of time on colour forecasting, however we found that very few companies feel that it is necessary to spend large sums of money on colour forecasting.

While designers choose the colour ranges, they collaborate with buyers and colour consultants for information and reassurance. The general opinion found, is that is not essential to explain the evolution of a colour palette to a buyer. Colour forecasting in apparel is reported as becoming more vital for marketing internationally. Exports play a large part in the economies of most countries so the industry must be informed as soon as possible of developments abroad. Colour establishes a national identity in international markets.

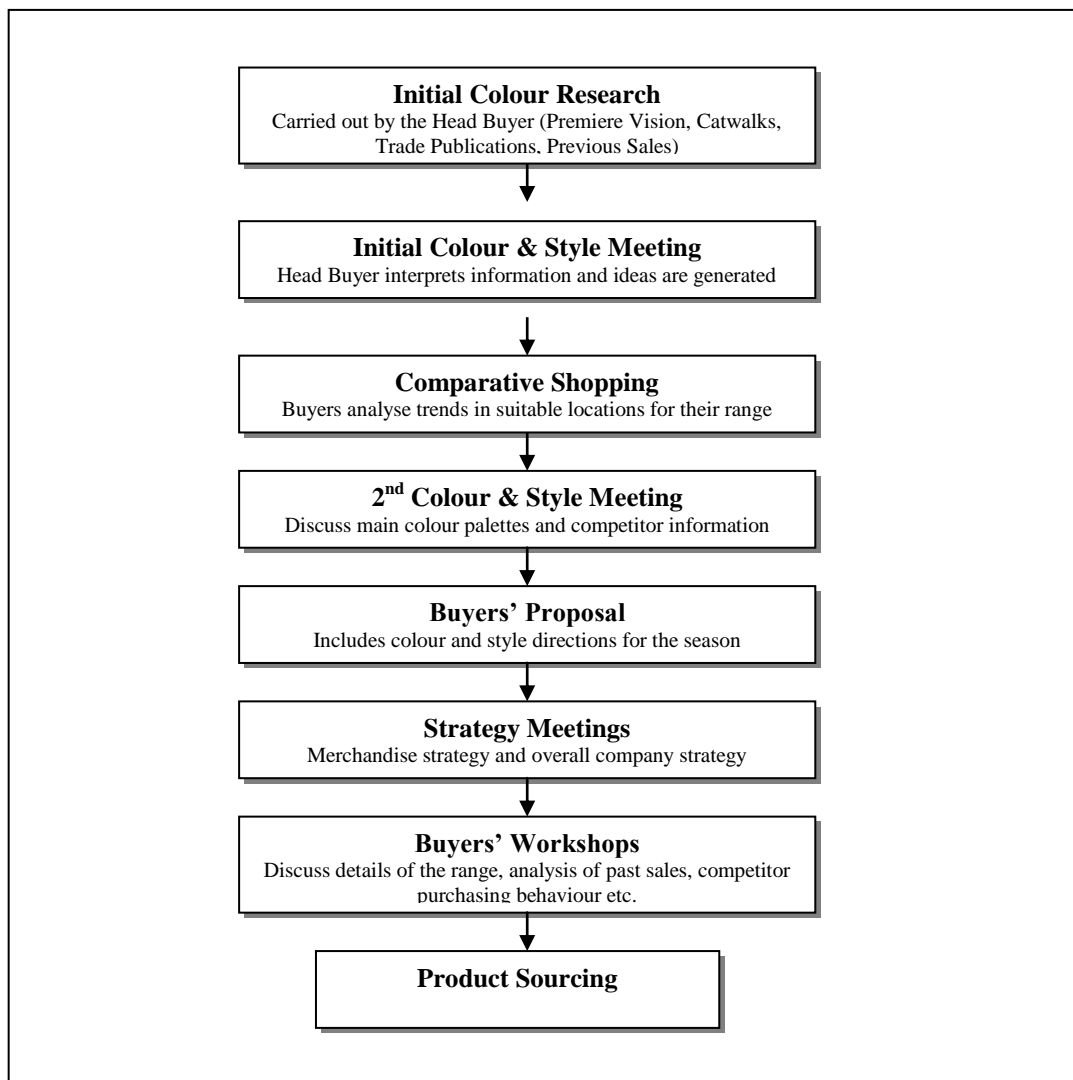
### **IMPLICATIONS FOR A UK MAIL ORDER COMPANY**

The preceding sections have described the information available to organisations when choosing their colour palettes for a season. The following section will look at how a leading mail order company interprets the information available to them. For mail order companies, getting the colour palette right first time is even more critical than for high street retailers

The mail order company studied, produces two catalogues per year; Spring/Summer and Autumn/Winter. This is the standard for a mail order company, however some companies have now started producing four catalogues per year in an attempt to keep up with fashion trends in the high street.

The company does not employ in-house designers and it is therefore the responsibility of the buyers to produce the colour palette for the season. This may be seen as a disadvantage, as design is only one aspect of the buyers' role within the organisation. It does, of course, eliminate the problems associated with buyers misinterpreting the designers' forecasts. The buyers do not get a lot of time to analyse trends for a season and therefore the head buyer, who comes from a design background, is responsible for interpreting the key trends to all the ladieswear buyers. The buyers work on an eight-month cycle and at any one time they are occupied with three catalogues; the 'live' catalogue, the next season's book and the following season. So the head buyer has a critical role to play in colour selection for all categories of ladies apparel and for setting colour directions for future collections. Figure 3 summarises the process of colour decision making within the company.

**Figure 3 The Process of Colour Decision-Making**



As previously described, there are many services that companies have at the disposal to aid them in interpretation of colour trends, but how does the information available influence colour selection in a leading mail order company? The information available from national and international forecasts is often too expensive for companies to subscribe to. The mail order company subscribes to Design Intelligence, but the information they receive is on style forecasting, rather than colour forecasting. Colour management in the company is not given sufficient priority to warrant substantial investment.

The head buyer will attend Premiere Vision each season to analyse the colour and style trends. This is the earliest fabric show, it is held one year prior to the retail season. The information taken from this will then be fed back to colleagues in the form of an initial colour and style meeting. The presentation will incorporate information from the catwalks, trade publications and previous sales. The initial meeting is regarded as an idea generating session after which buyers will conduct comparative shopping in locations such as New York, Paris, Milan and London.

A second meeting is held, where the head buyer presents the main colour palettes for the season. This covers a range of classic, fashion and neutral colours. The garment

manufacturers inform them of competitor's purchasing behaviour and the colour palettes that they believe will work for the forthcoming season. The garment manufacturers also gather substantial information on colour trends. This is used to confirm the colour palettes that the buyers have produced.

After each buyer decides on their collection, they produce a proposal, which goes forward to the 'strategic roof' meeting. This is a high level meeting consisting of two stages; merchandise and company. At the merchandise stage, buyers discuss range plans and page allocation. Their proposals form the basis of the merchandise policy for the company's strategy. At this stage, senior merchandising, marketing and financial and planning staff agrees the strategy and colour and fashion direction for the next season.

The next stage of the process is buying workshops. Buyers have already formed a good idea of the range they want to put together, the team discusses the concepts, research on colour forecasting, historical information, while analysing supplier performance and the pricing structure for the range. With the outlines of the range firmly in place, the process of sourcing begins.

Buyers try to make the final decisions on the range as late as possible, to try to incorporate any changes in fashion. It is difficult for mail order companies to keep up to date with changes in fashion as their ranges are only produced twice a year and fashion can change as often as every 6-8 weeks. Advances in technology may help mail order companies to overcome this problem. With the increasing usage of the Internet many mail order companies are starting to use this to display their products. High street retailers are also turning to the Internet as another form of selling their products. However, mail order companies have a competitive advantage over high street retailers as they already have the processes in place to send goods via mail. If mail order companies succeed in using the Internet in addition to their catalogues, this will enable them to keep up with changes in fashion as their product could be updated on the Internet as fashion dictates.

Recent developments in the electronic transmission of precise colour specifications<sup>16</sup> have been reported. Rapid accurate colour communication is regarded as a potentially key contribution to improving both the process of colour forecasting, and its wider use.

Mail order companies are limited on the colours that they can reproduce in a catalogue, this is due to the problems associated with photographing certain colours. If a garment does not look the same colour as it is in the catalogue, it will result in high return rates.

Many people at different parts of the process of producing a new collection and catalogue make decisions about colour. Putting the customer in the centre of this process and focusing on their needs would help to recognise the crucial role that colour plays in consumer product choice.

## **DISCUSSION**

If accurate colour forecasting is essential to mail order companies, the question may be asked, why do they not use more information to produce their forecasts? There are many reasons for this; colour forecasting services are expensive and many companies believe that they work only as confirmation for the colour palettes that have been chosen. Forecasting services produce many colours for a season, and as one designer said "It is up to you to choose your

colours according to your particular market niche and the colours that you think will work.”<sup>13</sup>. They believe that forecasts act as a springboard to work from.

Colour forecasters are either strangely gifted individuals who can foresee subconscious global yearnings for particular new colours or else they are equally gifted individuals who are able to persuade companies to believe what they say. In a way, it does not really matter what you make of it, because either way the predictions come true. Fashion has to keep moving, so the seasons come and go and colours come in and go out. Producing new seasonal colours is a way of reinjecting energy and vitality into the store environment. Fashion demands new colours, to provide them the fashion industry needs colour forecasters. Forecasting is a complex process, not to say an occasionally mystifying one, but it works. It is not an exact science, it is more of an intuitive and emotional business.

Research has shown that colour consultants are very useful for manufacturers, however the mail order company in question believes that it is not a necessary expense for them. Trade fairs tend to act as confirmation for companies rather than being trend setting as they happen at a later stage than many forecasts and are more geared towards the buyer. This was the case for the mail order company, who use trade shows as a form of inspiration. They tend to let the information on colour forecasts filter down to them through the supply chain.

The colour forecaster provides colour choice for a season, but the final decision lies with the buyers. Buyers tend to be market lead, and it was felt that this makes them rather conservative in their selection. This may be reflected in the lack of innovation on the high street and in mail order catalogues<sup>13</sup>. Few manufacturers or retailers want to be outside the mainstream and in order for the designer to survive, they must often act as a provider of mainstream fashion catering for the masses.

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