THE TREND FORECASTING PARADOX?

An exploratory study of the compatibility of trend forecasting and sustainability

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Kara Tucholke
Pauline Frohm

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THE SWEDISH SCHOOL
OF TEXTILES
UNIVERSITY OF BORÅS

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Author: Kara Tucholke and Pauline Frohm

Supervisor: Hanna Wittrock

Abstract

Trend forecasting is perceived to be an essential service for fashion companies to use in order to stay competitive in the fast-paced fashion industry. Yet, in times of climate change, appointing new trends each season is a questioned practice. Since trend forecasting aligns with the inherent obsolescence of fashion's constant change, forecasting seems to stand in paradox with the imperatives of sustainability. Thus, this thesis aims to explore the role of trend forecasting to understand its compatibility with environmental sustainability.

The review of previous research depicts the evolution of the trend forecasting field and displays prominent literature within fashion and sustainability, which together displays an apparent research gap that this study aims to fill. The thesis follows an exploratory design pursuing a multiple case study strategy applied through eight semi-structured interviews with trend forecasters and a content analysis of WGSN online trend forecasts.

Findings of this study validate the existence of a trend forecasting paradox while also demonstrating areas of compatibilities. Customized forecasting and long-term approaches were concluded as compatible practices and may be integrated into both long-term and seasonal forecasting. This study also recognizes a need to differ between forecasting sustainability and sustainable forecasting. This thesis is believed contribute to an under-researched area and aid the trend forecasting industry to realize its impact on sustainability, as well as suggesting approaches on how to further incorporate sustainable practices into their work.

Keywords: Fashion trend forecasting, environmental sustainability, long-term/short-term forecasting, trend forecasting paradox

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1 Introduction

This introductory chapter narrates the background of trend forecasting in the context of fashion and sustainability. Thereafter, the problematization frames the research problem by displaying the fashion paradox with which trend forecasting aligns, as well as proving trend forecasting in connection to sustainability as an under-researched area. The problematization is followed by the research purpose and question, demarcations, and chapter overview.

1.1 Background

> Now, we are living climate change, not just reading about it in the news! Proposing something new for something new, just because it's a new season, doesn't make any sense (Cecile Poignant, as cited by Wharry, 2019)

In times of climate change, appointing new trends every season just for the sake of seasons has become a questioned practice (Wharry, 2019). New trends are introduced and make the previous appear outdated. This cycle of newness fuels garment production which brings along environmental impacts (Payne, 2013). Still, fashion trend forecasting is perceived to be an essential resource for fashion companies to stay competitive in the fast-paced fashion industry (Gupta, 2018). By providing the fashion industry with insights about upcoming trends, forecasting agencies constitute a support system for commercially accurate design decisions (Lantz, 2018). Trend forecasting agencies have thus been referred to as fashion's "insurance companies" (Lantz, 2016), positioning them as a highly influential and initial driver of the fashion cycle (Cassidy, 2017).

The fashion industry has labelled sustainability as a "megatrend" (Mittelstaedt, et al., 2014) and has evolved to increasingly prioritize it (Berg et al., 2019). Major fashion brands like Zara, Kering, and H&M announce sustainability goals or collaborate in sustainability-forward organizations, such as the UN Alliance for Sustainable Fashion and the Global Fashion Agenda (Kent, 2019). Yet, consumers are accustomed to seeing product releases every month where; the fast fashion retailer Fashion Nova releases 600 styles every week (Marci, 2019). Given the resource depletion and environmental pollution that garment production causes, a change in the fashion system is considered inevitable (Henninger, et al., 2017).

The initially quoted forecaster, Cecile Poignant, asserts the difficulty in achieving change in the industry since it will affect how fashion companies make their money (Wharry, 2019). With business models based on selling "new trends", there are earnings at stake for fashion brands, their stakeholders and trend agencies. Poignant sees the trend forecasting industry becoming too business-motivated and acting solely as a "risk mitigator" for companies. Instead, there exist needs for agility and aiding companies in "creating long-term solutions", like finding solutions to produce in a sustainable way (ibid.). Whether it is due to global climate disruptions or pressure from consumers and regulations, environmental and social responsibility have become a main concern for the fashion industry (Berg et al., 2019). Whereas the primary aim of trend forecasting is expressed to revolve around selling forecasts

(Treijs, 2007), it appears contradictory to the fashion industry's ambition towards a more sustainable future.

Yet, trend forecasting agencies have been progressively forecasting the sustainability trend. What started as a shallow, visual trend of 'eco-chic' in the 1990s (Black, 2008) has seemingly developed into more serious efforts. The market-leading online trend forecasting agency, WGSN, has built its forecasts to revolve further around sustainability (Blaszczyk & Wubs, 2018), yet one can still find daily updates about trend concepts, styles and key items in their online database (WGSN, 2020). Similarly, the trend oracle Li Edelkoort declared the death of fashion in her anti-fashion manifesto in 2015, yet recently announced green to be the trend colour of summer 2021 (van Loon, 2019). As such, fashion and sustainability can be described to stand in a paradox to one another (Black, 2008), considering fashion's need for novelty which propels greater material apparel through the system, bringing with it the associated environmental impacts of garment production (Payne, 2013). Since the business model of trend forecasting aligns with the inherent obsolescence of fashion's constant change, there are reasons to assume an equally paradoxical relationship between trend forecasting and sustainability.

1.2 Problematization

As of today, the fashion industry is known as the world's second most polluting industry (Henninger et al., 2016), accountable for 10 percent of global carbon emissions and 20 percent of all wastewater (UN, 2019). The State of Fashion 2020 report, by Business of Fashion (BoF) and McKinsey & Company, makes use of the word 'uncertainty' to characterize the future of an industry that increasingly sees declining sales, paired with political and environmental incidents (Amed et al., 2019). Despite the progress made so far (Henninger et al., 2017), fashion is slow to convert its unsustainable ways due to its dependence on change (Tham, 2012). An industry that continuously erodes the environment it takes its resources from seems far from sustainable (Daly, 1992), yet it is inherent to the fashion system to sell garments with temporary appeal and create demands for new styles through a constantly changing trend cycle (Black, 2008). So, how can the prerequisites of environmental sustainability reconcile with the alternating and intrinsic obsolescence of fashion's constant change (ibid.)?

Fashion trend forecasting is at the forefront of change and aspires to bring inspiration for innovation, yet it is complicit in the unsustainable actions of the fashion industry. According to the eminent colour forecasting scholar, Tracy Cassidy (2017), the forecasting industry drives the fashion cycle with its pursuit to provide clients with continuous novelty. The novelty is the reason clients subscribe to forecasting services in the first place, and without it, they would question the service paid for (Cassidy, 2017). Correspondingly, trend forecasting is dependent on the existence of trends, seeing that the desire for novelty is what fuels their entire business (Mackinney-Valentin, 2006). Predictability has become essential for the highly competitive fashion industry, rooted in a fear of being 'wrong' about design decisions

since the probable outcome would be revenue loss due to unsold garments (Tham, 2008; Cassidy, 2017; Gupta, 2018). Thus, trend forecasting agencies have been referred to as fashion's "insurance companies" since their predictions are considered reliable and support fast and accurate commercial decisions (Lantz, 2018). In that sense, trend forecasters have a significant influence on their clients' decision-making (Tham, 2008). The commercial framework that trend forecasting operates within contradicts the need for balance that sustainability entails (Tham, 2008), and the threat of climate change has made consumers question the fast-changing fashion system and call for greater transparency within the industry (Keiser et al., 2018).

One barrier preventing a sustainable paradigm shift within the fashion industry is arguably due to its complexity, which is ascribed to its insularity (Obergón, 2012). Obergón (2012) and Tham (2015) underline the need to see the fashion system as interconnected instead of what is currently treated as separate problem areas. One example that illustrates the fashion industry's insularity is its inability to collaborate across different sectors, e.g. the technology sector. Here, professionals within AI and software development often seem to lack knowledge about the fashion industry, while professionals within the fashion industry are inexperienced with AI and are sceptical of how to benefit from it (Giri, Jain & Bruniaux, 2019). The concept of eco-tech fashion reveals that the right application of technological innovations can lead towards a more sustainable fashion system, provided that there is an effective collaboration between all players in fashion, i.e. designers, manufacturers, scientists, retailers and consumers (Scaturro, 2008).

According to Giertz-Mårtenson (2018), fashion trend forecasting is an under-researched field considering its highly influential role in shaping the future of fashion. Although academic work in fashion has brought clarity to the trend forecasting practice and its influential position (Gupta, 2018; Rousso & Ostroff, 2018; Blasczyk & Wubs, 2018; Lantz, 2018; Moschopoulos & Dahlström, 2012), a sustainability perspective is absent. Also, many studies have been dedicated to fashion and sustainability (Black, 2008; Obergón, 2012; Scaturro, 2008; Thomas, 2019; Henninger et al., 2017; Fletcher & Grose, 2012; Allwood, 2006; Thorpe, 2007; Williams, 2019). However, these studies have not addressed the role of trend forecasting as a factor contributing to the unsustainability of the fashion industry. Thus, previous research seems lacking with regards to trend forecasting and its connection to environmental sustainability.

The fashion and sustainability scholar Matilda Tham's (2008) dissertation "Lucky People Forecast" depicts trend forecasting as the most influential driver of mass-market fashion. Therefore, she requests new approaches to trend forecasting, focusing on opportunities rather than barriers with regards to fashion and sustainability. Payne (2011), believes trend agencies hold the key to impact the future and suggests that trend forecasters could avoid promoting aesthetic trend features that ask for unethical processes. Where fast fashion companies have made efforts to engage in environmental improvements (Henninger et al., 2017), it is in our interest to see whether the trend forecasting industry has started to take similar efforts. In addition to the absent research of connections between trend forecasting and sustainability,

there seems to also exist diverse perceptions of the mission of trend forecasters. In Muvira's (2015) study of how designers are influenced by trend institutes, she noted that trend institutes are not advocates of sustainability because it is not believed to be a part of their mission. Contrariwise, Petermann (2014) argues that forecasters have become so influential they could be described as political. Reconciling trend forecasting, whose business model aligns with the "inherent obsolescence of fashion's constant change", with the requirements of sustainability appears challenging. Altogether, this suggests the importance of further exploring the role of trend forecasting in order to understand its compatibility with environmental sustainability.

1.3 Research purpose and question

This thesis aims to explore how trend forecasters perceive environmental sustainability and the role of trend forecasting in the fashion system. Based on these perceptions, this study seeks to find the compatibility of trend forecasting and sustainability.

- How do trend forecasters perceive environmental sustainability and the role of trend forecasting as a part of the fashion system?
- Based on these perceptions, how is trend forecasting compatible with environmental sustainability?

1.4 Demarcations

The fashion industry comprises various stakeholders who hold an influential position on fashion's future, such as social media influencers, designers, buyers, consumers, etcetera (Kawamura, 2005). The interest of this thesis is, however, to explore the role of fashion trend forecasting, and is therefore demarcated to this particular division. Moreover, the realm of sustainability encompasses a triple bottom line including financial, social and environmental perspectives (Elkington, 1997), whereof solely the environmental will be addressed in this research.

1.5 Chapter overview

The first chapter, *Introduction*, narrates the background of trend forecasting in the context of fashion and sustainability. Thereafter, the problematization frames the research problem by displaying the fashion paradox with which trend forecasting aligns, as well as illustrating trend forecasting in connection to sustainability as an under-researched area. The problem discussion is followed by the research purpose and questions, demarcations, and chapter overview.

The second chapter, *Previous research*, presents literature within the field of trend forecasting, as well as the realm of fashion and sustainability. Thereafter, the reviewed literature culminates into a research gap, disclosing areas of absence within trend forecasting and sustainability. Lastly, a conceptual framework adds a theoretical perspective of fundamental concepts within fashion and sustainability, aiming to aid the analysis of empirical data.

The third chapter, *Research methodology,* argues for the chosen research strategies, and seeks to present the research process in a transparent and authentic way. The chapter includes research philosophy, research approach and design, research strategy, data generation, data analysis, limitations, ethical considerations, and research quality.

Chapter four, *Results and analysis*, presents the empirical findings generated through our interviews as well as the content analysis of WGSN forecasts. The chapter is arranged in a thematic sequence initially analyzing perceptions of sustainability, fashion and trends, followed by the trend forecasting paradox, reflections on influence, collaboration through technology, and the future of forecasting.

The final chapter, *Concluding discussion*, discusses the main findings in comparison to previous research, and answer the research questions in order to fulfill the purpose of this thesis. Thereafter, research contributions and managerial implications will be presented, as well as limitations and suggestions for future research.

2 Previous research

This chapter reviews previous research within the field of trend forecasting, as well as the realm of fashion and sustainability. Thereafter, the review of literature will reveal a research gap, disclosing areas of absence within trend forecasting and sustainability. The trend forecasting literature is divided into subject areas to illustrate the evolution of the field. The fashion and sustainability literature is arranged on the basis of different disciplines to display absent research of trend forecasting and sustainability. The chapter ends with a conceptual framework to add the theoretical genesis of this study, and further aid the data analysis.

2.1 The under-researched trend forecasting field

The literature within the fashion trend forecasting field is altogether rather limited and is an outspoken under-researched area (Dahlström & Moshopoulos, 2012; Blaszczyk & Wubs, 2018; Lantz, 2018). Dahlström and Moshopoulos (2012) dedicate their thesis to investigate the forecasting practice, aiming to contribute with sophisticated research findings to a field with a lack thereof. The authors problematize the lack of academic literature based on primary data collection, with the most prominent works approaching the forecasting method somewhat subjectively (Perna, 1987; Brannon, 2005; McKelvey & Munslow, 2008). This was likewise recognized in our search for early trend forecasting literature: therefore, this chapter predominantly relies on research from the last decade or two.

Fashion journalist Rita Perna (1987) is one of the forerunners within trend forecasting and belongs to the non-academic contributions previously addressed by Dahlström & Moshopoulos (2012). In her book *Fashion Forecasting: A mystery or a method?* Perna appoints the recognized mystique of fashion forecasting and attempts to bring clarity to the practice. Although disclosing qualities such as "developing the eye", revolving around the intuitive ability of "seeing" (i.e. register trend information), Perna (1987) outlines the process arranged by colours, fabrics and silhouettes. Media researcher Evelyn L. Brannon (2005) similarly refers to the ability of "seeing" in her book *Fashion Forecasting*, which addresses fashion professionals seeking to improve forecasting skills. Brannon (2005) merges traditional and digital forecasting approaches and integrates theories of the changing fashion cycle. Kathryn McKelvey and Janine Munslow's (2008) *Fashion Forecasting* is also seen as a main contribution of this field and is likewise intended for fashion professionals interested in learning the forecasting practice. McKelvey had her professional background within fashion forecasting before pursuing an academic career, and Munslow worked as a designer before becoming a fashion marketing teacher. Although these three works have been said to approach fashion forecasting somewhat subjectively (Dahlström & Moshopoulos, 2012), they are seen as prominent contributors of this field and are frequently cited in trend forecasting research.

There is a brief selection of early research from Sweden, where *trend forecasting* is commonly referred to as *trend analysis*. Among these exist Hanna Wittrock's (2000) MA thesis *Mode och modernitet – trendanalys och postmodernitet* where she investigates the

relationship between the two opposing scientific and trend analytic positions through the changing social structures in postmodern times. Wittrock (2000) probes that science oftentimes interpret fashion as a postmodern fragmented phenomenon deprived of meaning, whereas trend analysts have the ability of seeing coherence and continuity in fashion while also considering themselves capable of interpreting fashion and society at large. The second Swedish contribution is Ingrid Giertz-Mårtenson's (2006) MA thesis *Att se in i framtiden. En studie av trendanalys inom modebranschen*. As the former CEO of the Swedish Fashion Council, Giertz-Mårtenson depicts a practice of which she has great experience. She describes the ability of spotting trends, trend pitching, as an important interpretation skill for forecasters to build their representative capital. Moreover, she finds that forecasters are not creators of trends but instead support the fashion industry by communicating already existing trend related ideas.

As previously described, the more recent literature is what contributes to the research within the trend forecasting field. This literature generally also summarizes the practice of trend forecasting, but rarely without approaching more controversial aspects of the profession. Naturally, once the practice has been clarified one moves towards more in-depth areas of research. On that note, various studies seek the motive of why trend forecasting has developed into a crucial service for fashion companies to make use of, often illustrated from a commercial merchandising perspective (Rousso & Ostroff, 2018; Blaszczyk & Wubs, 2018). There is also a repeated mention of the influential position that the trend forecasting industry possesses as a driver of the fashion system, often accompanied by the debated topic of self-fulfilling prophecies (Lantz, 2018; Petermann, 2014; Tham, 2008). Trend researcher Jenny Lantz (2018) shows how fashion and capitalism, culture and economy, interconnects through the global trend machinery. Elisabeth Petermann (2014) brings trend forecasting into the design field and investigates its threatening position by heavily crafting the designs of tomorrow. Mathilda Tham (2008) merges the disciplines of future studies, design, and sustainability, and is the forerunner of exploring trend forecasting in relation to sustainability.

During the past decade, research has also been devoted to studying how the trend forecasting industry manages the increasingly faster pacing trend cycles and discusses the fashion industry's lost confidence in long-term forecasts, replaced by real-time trend updates (Gaimster, 2012; Giertz-Mårtenson, 2018). The latest literature in the trend forecasting field is often rooted in technological developments and what these can bring to the forecasting profession (Giri, Jain, Zeng & Bruniaux, 2019; Luce, 2019). Although several forecasting studies have been conducted with anchoring in technology before, the context is not particularly in trend forecasting but rather in demand forecasting belonging to supply chain management. This forecasting is based on predicting consumer patterns in order to set accurate production volumes and improved sales forecasts for budget planning (Christopher, Lowson & Peck, 2004; Nenni, Giustiniano & Pirolo, 2013). The presented areas of recent research will be further depicted under the subheadings throughout this chapter in order to create a more comprehensive understanding of the fashion trend forecasting field.

2.1.1 The practice of trend forecasting

The practice of forecasting is usually described as complex due to its need for both scientific and creative methods (Rousso & Ostroff, 2018; Kim et al, 2011), although some explain the practice as mainly creative, based on the forecaster's intuition (Lantz, 2018; Mackinney-Valentin, 2010). Nevertheless, it is agreed that the role of trend forecasters is to possess a profound understanding of trends in order to provide clients with credible information about upcoming trends in colour, fabric, and silhouette (Rousso & Ostroff, 2018; Lantz, 2018; Mackinney-Valentin, 2010; Sterlacci & Arbuckle, 2009). Gaining this fashion capital of intrinsically understanding the movement of trends and the skill of anticipating the invisible, requires extensive experience within the fashion field (Rousso & Ostroff, 2018; Lantz, 2018). Mackinney-Valentin (2010) specializes in researching trend mechanisms and the fascination around trends; whether it is the sense of renewal, the organizing abilities, or the relish of being seduced. However, the desire for newness is what is believed to fuel the entire industry of trend forecasting (Mackinney-Valentin, 2006).

Rousso & Ostroff (2018) are researchers of fashion management and merchandising and in their book *Fashion Forward*, the authors outline the practice and responsibilities of forecasters. The authors describe that the responsibilities of a trend forecaster are to recognize movements in contemporary society, realize what specifically drives these cultural shifts and estimate their relevance, to inform clients about potential future effects. The steps included in the fashion trend forecasting practice is arranged as followed: *theme, colour, fabric and materials, and look*. Lastly, the forecast is compiled into a *presentation*, which is communicated both visually and written, e.g. trend books, online reports, and webinars. A successful presentation is said to consist of stimulating imagery and a compelling but understandable script which enables clients to apply the forecast efficiently onto their business (ibid.).

Lantz (2018) likens trend forecasters to mediators of the fashion system, since the way they develop and communicate trend forecasts influence and frame how clients, thus also consumers, interpret trends. However, she points out that most trend forecasters try to avoid being represented as directive and instead promote an inspirational image, heeding the debated topic of forecasters as informants versus creators of trends (Lantz, 2018). This topic is also discussed by colour forecasting researcher Tracy D. Cassidy (2017), when describing the areas of colour forecasting while noting that some believe trend forecasting aims to predict while others say predetermine. Colour forecasting is known as the most prominent tool for driving sales of fashion items. Through biannual forecasting reports, the seasonal change of colours underpins planned obsolescence of fashion trends, thus spurring the desire for newness (ibid.). Cassidy (2017) explains that the need for seasonal change depends on that forecasts must keep on progressing since clients would otherwise question the service they pay for.

2.1.1.1 Short-term versus long-term trend forecasting

According to Mackinney-Valentin (2010), the lifetime of a fashion trend can span from three months up to three years. However, she also implies a perception of slower trend cycles due to the large coexistence of trends (ibid.). This variety calls for different time horizons when forecasting fashion trends. Burns, Mullet and Bryant (2016) divide the trend forecasting practice into long-term and short-term, where the first covers forecasts made one to five years ahead of season, while the latter engages in trends one year ahead or less.

Ingrid Giertz-Mårtenson (2018) has dedicated research to the different approaches to trend forecasting, expressing a concern for the relevance of long-term trend forecasting in our modern fast fashion marketplace. She explains that the ability to foresee trends far ahead of season used to be perceived as the legitimacy of the forecasting profession but has now turned into a questioned practice (ibid.). The evolution of fast fashion has paralleled the rise of information and communication technologies, and thereby facilitated the quick circulation of trend information, extracted through consumer research and generated by trend forecasters, to buyers, designers, manufacturers, etcetera (Payne, 2013). Julia Gaimster (2012) similarly problematizes the practice of long-term forecasting in her dissertation *The changing landscape of fashion forecasting*. Her findings point to technological developments as the main force behind the changing forecasting industry. The increased speed and amount of information flows has impacted how trend information is exchanged, calling for adaptation within the trend forecasting industry to keep up with the impact of technology (ibid.).

Despite the recent prominence of short-term forecasts, some researchers emphasize the long-term approaches to work for the common goal of sustainability (Vergragt & Quist, 2011). Vergragt and Quist (2011) present the practice of backcasting as a long-term method to achieve a sustainable future, through the discipline of technology and social change. The authors explain the practice of backcasting as envisioning a desired future scenario, and from there, work backwards to strategize and arrange how this future can be reached (ibid.). Similarly, Brannon (2005) includes an interesting discussion of the benefits of the long-term forecasting method, which she defines as scenario writing:

> Long-term forecasts contain optimistic predictions about amazing advances and pessimistic warnings about eroding quality of life caused by population pressures on the environment. [...] Looking at alternative futures can encourage executives to think more creatively about long-range planning.

2.1.2 Influence of trend forecasting

The fashion system consists of several divisions involving diverse actors that contribute to the creation of fashion in one way or another. Hence, the fashion system is built upon collective activities striving towards generating the future of fashion (Blaszczyk & Wubs, 2018). According to Giertz-Mårtenson (2018), fashion trend forecasting is a division of the fashion system which has passed by relatively unnoticed despite its noteworthy influence. She argues

that forecasters are significantly contributing in creating tomorrow's fashion and resembles forecasters as tastemakers of the fashion system (Blaszczyk & Wubs, 2018).

Another author who similarly refers to trend forecasters as tastemakers is the trend researcher Jenny Lantz (2018). In her book, *The Trendmakers: Behind the Scenes of the Global Fashion Industry*, she argues that trend forecasters, as cultural intermediaries and tastemakers, have been overlooked in fashion literature despite their highly influential power with both clients and consumers. Furthermore, Lantz (2018) states that trend forecasters can be seen as fashion's "insurance companies", which argument is based on an interview with Neil Bradford, CEO of WGSN - the agency which dominates the trend forecasting field. Bradford explains that WGSN helps clients to avoid mistakes by providing them with trend forecasting information, which he refers to as "the insurance policy". Furthermore, WGSN identified sustainability as a trend in 2004, with their report "Sustain" giving clients directives for how to make their business more sustainable. Besides such sustainability reports, WGSN still brings out seasonal design forecasts (ibid.). According to WGSN trend consultant Jane Kellock, it is important to make every season "look new" to subscribers, in that way it will appear new to customers. By evolving the trend stories from former stories, the key is to make them appear convincing to the client but also to "not change it too much [...] because it is not sustainable to make it look completely different" (Lantz, 2018, p.25).

Tham's (2008) dissertation "Lucky People Forecast" concluded that trend forecasting is the most influential driver of mass-market fashion. Therefore, she requests new approaches to trend forecasting to work on opportunities rather than barriers by implementing collaborative processes and highlight the compatibilities between fashion and sustainability. Accordingly, Alice R. Payne (2011) investigates the influence of forecasters and believes trend agencies hold the key to impact the future by avoiding furthering aesthetic trend features that ask for unethical processes. Petermann (2014) probably delivers the most radical statement concerning the powerful position of trend forecasters by arguing that the opinions of forecasters are so influential they may be labelled as political.

2.1.3 Technology in trend forecasting

The past decade has been highly dedicated to software developments, several of which have been intended to facilitate the consumer-oriented part of fashion forecasting (Burns, Mullet & Bryant, 2016). Forerunners mainly focused on outlining who buys what, and where (Burns, Mullet & Bryant, 2016) while more recent software have been developing functions of artificial intelligence to make smart trend predictions (Giri, Jain, Zeng & Bruniaux, 2019).

Giri, Jain, Zeng and Bruniaux (2019) studied different areas within artificial intelligence that have contributed to the fashion and apparel industry, i.e. machine learning, expert systems, and image recognition. Machine learning means that the software is trained to perform a delegated task; expert systems entail a reasoning function and make decisions without human involvement; and image recognition is when a computer is trained to interpret the content of an image. The reasoning approach of expert systems seems to be of limited use within forecasting. Most advancements are trained software forecasting on the basis of historical

patterns (Storari & Valli, 2008) or make use of real-time data (i.e. "web scraping" social media) to make quick and short-term trend forecasts (Luce, 2019). However, Giri, Jain, Zeng and Bruniaux (2019) acknowledge a disconnect between professionals within artificial intelligence who often lack fashion knowledge and fashion professionals who are inexperienced with artificial intelligence and sceptical of how to benefit from it.

2.2 Fashion and sustainability

The theme of sustainability is broadly spread throughout the disciplines of textile and fashion literature. Depending on the discipline, it may be approached in a more practical or a more theoretical manner. This section gives a broad overview of what different disciplines of the fashion industry publish about sustainability.

Today, scholars in and outside of fashion argue that the term "sustainability" is suffering from too many definitions (Thorpe, 2007; Peattie & Belz, 2012) and the definition of sustainability in fashion terms is described as a "fuzzy concept" (Markusen, 1999), interpreted differently according to person and context (Beard, 2008; Henninger et al., 2017; Thomas, 2019). Efforts to integrate sustainability into the fashion industry has been tackled differently by different stakeholders. While fashion managers see a need to integrate benchmarks to measure and reduce impacts and resource use, designers see solutions in close relationships with suppliers and consumers, or changes in materials and production techniques (Thomas, 2019). For garment retailers from mass-market to luxury sectors, the theory of the "triple bottom line" is used as a yardstick for sustainable practice on an organizational level (Elkington, 1998), with social, environmental and financial performance considered equally (Shen et al., 2017). Corporate social responsibility (CSR) practices, where garment retailers set requirements for their production facilities, often situated in developing countries without local law enforcement (Larsson et al., 2017), also provide an opportunity to for addressing issues of sustainability. With codes of conducts, standards enforced by third party audits, and through educating their manufacturers and suppliers, retailers integrate sustainability in their supply chain (ibid.; Tham, 2012). The focus here lies on workers' rights and the environmental impact of material procurement and garment production (Grose, 2017). Such efforts are means to uphold corporate image and future profitability (Grafström et al. 2008).

Additionally, literature on Sustainable Supply Chain Management (SSCM) suggest that long term, mutually beneficial and transparent relationships with suppliers are key to reaching a sustainable practice in the industry (Ashby et al., 2017). Increasingly discussed are reverse supply chains that enable a 'closed loops' of the garment lifecycles, where recycling and remanufacturing of disposed products lower environmental impacts of waste (ibid.) Furthermore, there are concerns about the impact that the transportation of garments around the world - from the place of cheapest labour to the store - has in creating carbon emissions and waste through packaging (Gardetti & Torres, 2017). By applying life-cycle assessment, one can quantitatively assess pollution, energy and resource use on the material level, for instance, measuring carbon and water footprints (Fletcher & Tham, 2015).

As opposed to sustainable supply chain strategies, sustainability in fashion retail describes sustainability strategies applicable to physical stores. For example, a proper energy management in retail stores, where green energy sources and lowered energy consumption lead to a reduction of environmental impacts (Strähle & Müller, 2017). The location of the retail store, but also other channels like social media, editorials and public relation events give brands the opportunity to connect with the consumer and educate about product use, but also communicate how the product was produced (Han et al., 2017). Through this, brands can further sustainable consumption patterns among their consumers (Sharma & Hall, 2010). For example, the environmental impact that frequent laundering has in the user stage of a garment (Allwood, 2006) is something that is not mentioned much concerning the impact it has (Tham, 2012).

Sustainable marketing and branding according to Belz and Peattie (2009), describes "eight Cs" in branding: core business, cooperation, credibility, consumer benefits, conversation, consistency, commitment and continuity. By making crystal clear its branding and marketing approach, a sustainability-driven brand should free itself from "postmodern communication, that is obsessed with the most extravagant latest lifestyle or eccentric experiential marketing trend" and "simply express what really matters" (Fletcher & Tham, 2015, p. 169).

Now turning away from the communication of sustainability, literature on fashion design and the role it can play to improve environmental impacts (Thorpe, 2007; Fletcher & Grose, 2012, Fletcher, 2014) is a discipline which is increasingly mentioned contributing to sustainability in fashion. Here, the designer can exert influence over material choice or production processes. Designing for reducing resource use (like zero waste cut and sew), reusing (resale of post-use garments), reconditioning (upcycling old fabric or garments) or recycling (creating new fibres from other materials or old fabrics) are principles that reduce environmental impacts through choices that can be made at the design stage (Fletcher, 2014).

An increasing amount of literature acknowledges the need for a wider, holistic view on the industry, transcending disciplines to reach a common goal of sustainability in the fashion industry (Fletcher, 2014; Tham, 2008; Gardetti & Torres, 2017). Fashion is a visual manifestation of change and celebrates novelty (Tham, 2012), prioritizing short-term gains over long-term change, which appear as barriers to the adoption of sustainability. The role of trend forecasting industry as an intangible element for informing trend and design research, has not been looked at through the sustainability lens as extensively as the other disciplines of the fashion and textile industry described above.

2.2.1 Fashion trend forecasting and sustainability

The most notable academic publication on fashion trend forecasting and sustainability is Mathilda Tham's (2008) philosophy dissertation "Lucky People Forecast". By applying systems thinking, she maps interactions between trend-forecasting, fashion design and environmental work. According to Tham (2008), trend forecasting is "the most important driver of fashion at mass-market level, and therefore a potentially viable agent of change" (p.

316). She implies that forecasters have the potential to support designers with creative and interdisciplinary approaches towards sustainability since they are using the same languages and processes relevant in the industry. Tham (2008) concludes that increased collaboration among trend forecasters and fashion designers can foster knowledge in sustainability and affect attitudinal changes by showing that fashion and sustainability are compatible concepts (ibid).

Fashion scholar Alice Payne (2011) investigated sustainability and the role of forecasting in her philosophy dissertation on Australian mass-market fashion. She concluded that all actors in the system, including trend forecasters, have the ability to effect change by "not promoting aesthetic trends that require unethical practices" (Payne, 2011, p.5). For example, she mentions toxic dyes or finishing techniques that have negative implications on the environment as well as workers (ibid.). When studying Australian mass-market designers, Payne (2013) concluded that the widespread use of trend-forecasting services was a barrier to adopting sustainability. She cited that an uncritical use of trend forecasts by designers lead to a close adherence to forecasted trends. This means translating the advised fabrics and dyes without considering their sustainability. Thus, the garment construction is effectively determined by forecasting institutes taking design for sustainability out of the equation. Payne recommends giving greater attention to how forecasting is used when considering design for sustainability (Payne, 2013).

Johanna Steffi Muvira (2015) investigates how trend forecasting agencies influence independent fashion designers and concludes that there is no communication of sustainability from the side of trend forecasters. Further, she claims that trend forecasters do not have an influence on small, independent and high-end fashion designers, especially those who already design sustainable fashion (ibid.). Muvira (2015) determines that the dated presumption of fashion designers as the only contributors to fashion (Kawamura, 2005 as cited in Muvira, 2015) should be reassessed. She expresses a need for trend forecasting agencies to enter the sustainability debate, where they will need to enhance their knowledge on the topic (ibid.).

All mentioned studies examine the role of forecasting from different standpoints. The common conclusion is that trend forecasting is playing a role as a contributor to the fashion industries' work with sustainability. Either seeing it as a barrier (Payne, 2011; 2013) or a potentially positive influence on sustainability on mass-market level (Tham, 2008). Following Muvira (2015), there is a need to engage into a debate about sustainability with trend forecasters.

2.3 Research gap

It is evident from the literature review that the research field of fashion and sustainability is extensive (Obergón, 2012; Thomas, 2019; Fletcher & Grose, 2014; Fletcher & Tham, 2015; Henninger et al., 2017), although, trend forecasting is seldom noted as contributing to the unsustainable fashion industry. At the same time, various studies have been dedicated to the practice and power of trend forecasting (Blasczyk & Wubs, 2018; Lantz, 2018; Rousso &

Ostroff, 2018; Gupta, 2018; Moschopoulos & Dahlström, 2012). However, apart from a few publications, sustainability has not been a part of the equation when outlining the practice nor responsibilities of a trend forecaster. The academic research that explicitly investigates on trend forecasters' roles in sustainability is dated at least five years or more. In addition, the research that investigates trend forecasters only uses a narrow sample of respondents where Tham (2008) interviews one trend forecaster and Muvira (2015) interviews two. Including a more extensive group of respondents from the trend forecasting industry, as well as forecasters outside the fashion realm, and situating the research in a time where the discussion on sustainability appears to be more pressing than ever before, this research attempts to add to an area of research yet under-investigated.

2.4 Conceptual framework

The conceptual framework aims to add the theoretical genesis of this study and includes the central concepts of fashion and sustainability in order to lay the foundation of what eventually culminates in the fashion paradox. The theories are intended to complement the review of previous research in order to further aid the analysis of empirical data.

2.4.1 Fashion

The theoretical field of fashion dates to the 19th century, when the fashion industry expanded and became increasingly accessible. This eventually attracted researchers to investigate fashion as a structural phenomenon, where Thorstein Veblen, George Simmel, and A.L Kroeber are granted contributions whom depict its cyclic structure and means of social class differentiation (Veblen & Banta, 2007; Simmel, 1957; Kroeber, 1919). In the mid-20th century, the social hierarchy perspective was exchanged by psychological considerations such as identity and meaning, dedicated to deeper rooted explanations within cultural research (Kaiser, 1997). According to philosopher Gille Lipovetsky (1994), fashion is deeply connected to the West and the qualities of modernity itself, characterized by speed of change, the notion of progress and the "artificial time" that fashion exists in (Calefato, 2004). With the emergence of mass-production, fashion became democratized and more accessible, less bound to one's economic status (Crane, 2000), as it once was a means for the wealthy to portray status (Lipovetsky, 1994).

Definitions of fashion as a system often revolve around its changing nature, representing fashion as a cyclic system which regularly shifts references of items that are fashionable at a certain point in time (Barnard, 2014). This continuously changing fashion cycle is mainly considered to be fueled by a desire for novelty (Mackinney-Valentin, 2006), which is central to the theoretical genesis of this study. Thorstein Veblen, economist and sociologist predecessor, suggests that fashion garments need to comprise exclusivity, inconvenience and novelty in order to be desirable. The appeal will, however, not linger due to the expected seasonal novelty wear-off which calls for new trends to replace the old ones (Veblen & Banta, 2007).

The system of constantly requesting new fashion items has direct impacts on materiality, since new items replace the previous ones which are hence discarded (Woodward & Fisher, 2014). In the current fashion system, fashion items are designed through the stimuli of fast-changing trends, creating simulated novelty which aims for obsolescence by ensuring that styles quickly turn dated. This fast-paced system is commonly referred to as fast fashion and offers - in addition to fast lead times - cheap fashion which invites a wider segment of consumers and also higher volumes of consumption (Ertekin & Atik, 2015). Lantz (2018) argues that making up-to-date fashion available to "everyone everywhere has made fashion relevant to everyone and no one. Nothing is out of style as everything is permitted; clothes are in style again before they have had time to go out." (Lantz, 2018, p. 207). Despite this, new trends keep dropping in the fashion industry (ibid.). Consequently, following the change and speed, greater amounts of material apparel are produced and driven through the system, bringing with its environmental impacts (Payne, 2013).

2.4.2 Sustainability

The review of previous research gave an outline of how different disciplines of fashion approach sustainability. This chapter, however, discusses sustainability without the boundaries of fashion disciplines, rather with a systemic view. The fashion sector is seen as a sub system of the larger system of economics, society and planetary ecosystems (Walker & Giard, 2013). It can be said that the fashion system is intangibly connected to the capitalist economic system (Wilson, 2003). The following shows the spectrum of sustainability in economic ideas, as well as how those ideas are translated in the fashion and sustainability discourse.

The most commonly cited definition for sustainability comes from the Brundtland report (WCED, 1987). On the basis of this, sustainability was framed as the Triple Bottom Line (TBL) (Elkington, 1998), where economical-, environmental- and social sustainability (or people, planet, profit) must be balanced. This remains the dominant way for companies to engage with sustainability, where - always in relation to profit - concerns for the natural and the workers' rights are addressed (Savitz & Weber, 2006). According to business analysts Andrew Savitz and Karl Weber, such Corporate Social Responsibility adds to the value of the company and can increase market share (Savitz & Weber, 2006, p. 23-25).

The author Robert Howell (2011, as cited in Payne, 2013) criticizes that the TBL sustainability can easily transform into so called "Mickey Mouse sustainability" in which the economy takes a prime part, while environmental and social aspects are treated as an afterthought. Such theories derive from the phenomenon of greenwashing, where "companies make false or misleading environmental claims, embellishing the product and its marketing" (Payne 2013, p. 40) with "no evidence for real sustainable sourcing, and sometimes even a complete lack of certification" (Black, 2013, p. 198). The emphasis on the economic sustainability that is part of the TBL is what has led the prevalent unsustainable course of actions. The need for continual economic growth (the function of our world-economic system) is the driver of unsustainable resource use. The developer of the TBL sustainability John Elkington himself acknowledges in 2011 that the triple bottom line cannot be

confounded with true sustainability, especially with a planet that is projected to have nine billion people in the year of 2050 (Payne, 2013).

Environmental economist Herman Daly (1992) proposes a model that puts the three formerly equally important sustainabilities into relation to one other. Rather, economic and social sustainability are dependent on an intact environment. According to Daly, a sustainable system "does not erode the environmental carrying capacity over time" (1992, p. 187). The current growth-based economic system has to develop away from growth and there are several propositions for replacing it, like Daly's (2008) steady state economy or the more radical 'de-growth' economy (Latouche, 2004). De-growth is defined as ''an equitable downscaling of production and consumption that increases human well-being and enhances ecological conditions at the local and global level, in the short and long-term'' (Kallis & Schneider, 2008 as cited in Kerschner, 2009, p. 544).

Coming back to 'fashion and sustainability' discourse, two contradicting paths become evident: one is aiming to limit risks to the environment and society through innovation within the current economic system (Williams, 2019). This "technocentric" view is characterized by the belief that human science and advanced technology can manage our environmental crisis and is based on ideologies of progress and efficiency (Madge, 1997). However, technology is said to be the enabler of mass-market fast fashion consumption, where technological systems have streamlined the design, manufacturing and consumption of clothing (Scaturro, 2008). Any efficiency gained in resource use and wastage is negated by an increase in production (Williams, 2019). As opposed to the "technocentric" concept, the "ecocentric" one emphasizes harmony with nature, simplifying material needs to reduce human impact on planetary ecology (Madge, 1997). The latter one challenges not only the economic system but also challenges beliefs and behaviour within fashion, radically rethinking current practice (Williams, 2019). Ultimately, the concept of "eco-tech" fuses technocratic and ecocentric views, where the application of the right technologies together with thoughtful manufacturing processes and consumption patterns aid the emergence of a sustainable fashion system (Scaturro, 2008). Effective collaboration between different roles in fashion - designers, manufacturers, scientists and consumers - will inevitably create more sustainable solutions (ibid).

2.4.3 "The fashion paradox"

The fashion and textile industry plays a big role economically and socially, employing almost 75 million people worldwide, whereof most are women (Black, 2008). It also has great ecological impact, responsible for 10 percent of global emissions and 20 percent of water pollution (UN Alliance for Sustainable Fashion, 2020). There has been a suggestion that the conspicuous consumption of faster and faster fashion must slow down (Black, 2008). The previously described need for novelty in the fashion system, together with the resulting obsolescence and waste through constant change set against the economic importance of the fashion industry (Black and Eckert, 2010) creates a fashion paradox. Black (2008) approaches fashion design and sustainability with an interdisciplinary perspective and first coined the term 'the fashion paradox": "This is then the fashion paradox - how to reconcile the transience

and inherent obsolescence of fashion's constant change with the imperatives of sustainability and social justice, and fashion's economic importance with diminishing resources?" (Black, 2008, p. 18).

Consumers are now more aware of the fashion and textile industry's negative impact on the environment and exert pressure on companies to act more sustainably (Ertekin & Atik 2015; Smith, Baille & Mchattie 2017). However, there has been a knowledge-to-action gap reported, where consumer don't consume sustainably because it is perceived as time-consuming, costly and stressful (Valor, 2008). Part of this struggle is the perception that sustainability poses a threat to economic development and prosperity (Markkula & Moisander, 2012). Even though fast fashion corporations are believed to be ecological unsound, they still contribute to the wellbeing in developing producing countries and the economic prosperity in countries where the money is being spent (ibid.). To accommodate the demand for sustainable fashion, fashion brands are offering eco-friendly produced items (Henninger et al., 2017; Joy, Sherry, Venkatesh, Wang & Chan 2012; Saner 2017). However, the above described economic models lay bare that a long-term economic system shift is needed to become truly sustainable. This leads to the question of how much do more sustainable production methods matter if the garments still have a short-term appeal and the consumption rate stays the same? (Kornberg & Svensson, 2018).

The fashion system's intrinsic relationship to and dependency on change is what makes the introduction of sustainability to the system so paradoxical. As part of the trend framework, fashion welcomes the new and rejects what is no longer new in the course of it (Tham, 2012). Tham (2012) discusses the feeling that fashion professionals often have, of wanting to move on to new ideas while the market is still catching on to older proposals, also described as the "trend-virus". This fast consumption of concepts leads to using words like climate change, sustainability, triple bottom line or cradle-to-cradle, repeatedly almost like buzz words. This familiarity with these concepts, however, does not necessarily lead to understanding the deeply complex ideas behind them. Before there can be realisation into practice, new concepts come along making the old ones seem outdated (ibid.).

Since changes in fashion concern the visual, satisfying our needs through superficial consumption and interaction with imagery, prevents a deeper engagement with it (Thorpe, 2007). Yet, according to research by Tham (2008), it is evident that personal agency is needed in order to reach long-lasting change towards sustainability.

3 Research methodology

The research methodology argues for the chosen research strategies and seeks to display the research process in a transparent and authentic way. The chapter includes the philosophical genesis, research approach and design, research strategy, data generation methods, data analysis, limitations, ethical considerations, and research quality.

3.1 Philosophical genesis

When pursuing research, the central aim is to contribute knowledge in a particular field (Saunders, Lewis & Thornhill, 2012). Therefore, it is vital to realize the essence, i.e. philosophy, of the generated knowledge, since the chosen philosophical genesis encompasses significant assumptions regarding the way researchers view the world. These assumptions, consequently, underpin the methodological decisions from research approach to data analysis (ibid.).

This research seeks access to subjective perceptions of social beings (fashion and non-fashion forecasters), to enable interpretation of how they perceive environmental sustainability and the role of trend forecasting. Hence, this thesis follows a subjectivist ontology and interpretivist epistemology (Saunders, Lewis & Thornhill, 2012). Developing knowledge through subjective perceptions necessitates the researchers to study forecasters' rationale behind certain actions and intentions (ibid.). To achieve this, the researchers are heavily responsible for their involvement since participants' meaning systems emerge through researcher-participant interaction and are understood by means of narratives (McGinn, 2012).

Interpretivism is allegedly suitable for management research, agreeing on the complexity of business situations as a "particular set of circumstances and individuals coming together at a specific time" (Saunders, Lewis & Thornhill, 2012, p. 116). This perspective emphasizes the influential role social actors of a certain period can play holistically, which aligns with the researchers' belief that trend forecasting, with its current gatherings of professionals, holistically contributes in creating the future of fashion. This strengthens the choice of social actors as research subjects since it suggests that the perceptions of forecasters are decisive in order to interpret how they make sense of the role of trend forecasting as an influential division of the fashion system.

3.2 Research approach and design

The research approach defines the way the research involves and relates to theory, consisting of *deduction*, *induction* and *abduction*. The *deductive* approach is rooted in existing theories which are tested through collected data, while the *inductive* approach builds theory on the basis of the collected data (Bryman & Bell, 2015). The *abductive* approach travels between deduction and induction, however, usually finds its starting point in data collection from which theory is complemented to create a logical explanation for the research questions (Saunders, Lewis & Thornhill, 2012). The aim of exploring subjective perceptions about trend forecasting suggests that the generated empirical data is crucial in terms of fulfilling the

research purpose. Additionally, the conceptual framework was added after all interviews were conducted and therefore constitute a theoretical complement to empirical data, as explained by Saunders, Lewis & Thornhill (2012). Hence, the researchers suggest abduction as the best suited approach. An abductive approach allows us to compare our empirical findings to existing literature while also granting the generated data as new discoveries.

The exploratory research purpose of this thesis reveals the nature of its research design, seeing that a study can be either *descriptive*, *explanatory*, or *exploratory* (Saunders, Lewis & Thornhill, 2012). An *exploratory* research study aspires to reveal 'what is happening; to seek new insights; to ask questions and to assess phenomena in a new light' (Robson, 2002:59, as cited in Saunders, Lewis & Thornhill, 2012). Accordingly, this thesis intends to explore the current perceptions of trend forecasting; aiming to find new insights to an under-investigated field; to ask questions and reassess the phenomena of trend forecasting in a sustainability-oriented era. Exploratory research consists of three principal approaches, namely literature search, 'experts' interviewing, or focus group interviews (ibid.). Similarly, this thesis begins with a review of previous research within trend forecasting as well as fashion and sustainability to establish a preconception of existing knowledge in the fields which unveil research gaps that are aspired to be filled. Trend forecasters and non-fashion forecasters, constituting our interview respondents, may be recognized as 'experts' of the research field.

3.3 Research strategy

The research strategy is favourably employed based on its likelihood of providing the better means to answer the research question(s) and fulfil the research purpose. The employed strategy for this thesis is a case study due to its in-depth exploratory design and means of elevating various perspectives from multiple data sources (Frey, 2018). According to Blatter (2012), case studies are suitable when exploring ideas and perceptions of individuals since they revolve around in-depth interviews, which will occur as primary data generation method in this thesis.

Robert Yin (2009) emphasizes the benefits of using multiple case studies. Unlike single case studies, multiple cases enlarge the coverage of the study, enabling the researcher to explore a rather comprehensive research topic of contemporary significance. Additionally, findings from multiple cases are considered more convincing, not only because they allow triangulation but also because findings are less likely to be biased (ibid.). For these reasons, this thesis applies multiple case studies by selecting interview participants from both different fashion forecasting agencies (Promostyl and CAUS) and independent trend forecasters (Geraldine Wharry and Magnus Høst), as well as a non-fashion forecaster (Ulf Boman, Kairos Future) to ensure unbiased perceptions.

3.4 Data generation

Data generation is the preferred terminology to data collection when the empirical material is viewed as produced through the sources of research by using qualitative methods. More

specifically, the data is recognized as a result of researcher-participant interaction, rather than considered to exist "out there" awaiting to be collected (Garnham, 2012).

3.4.1 Interviews

The data generation of this thesis is based on qualitative interviews to explore the role of trend forecasting and its compatibility with environmental sustainability. Interviewing is a primary data method common when the research aims to explore subjective perceptions of participants towards a specific phenomenon (Frey, 2018). In line with the interpretivist perspective, interview findings are not to be considered the objective truth, since the subjective realities of researchers and participants will determine what questions are asked and how they are responded to, and in that way influence the generated data (Moisander & Valtonen, 2006).

There are various ways to conduct an interview depending on the desired outcome, including structured, semi-structured, and unstructured interviews (Frey, 2018; Ayres, 2012). The interviews conducted through this case study are resembled as semi-structured, since they aim to discover the aspects of the studied research domain from the participants' viewpoints (Ayres, 2012). Semi-structured interviews favour the use of interview guides to ensure that similar questions are asked across participants, while also allowing the researchers to ask individualized follow-up questions (Frey, 2018). Accordingly, our participants were asked similar questions to ensure coverage about topics of significance to fulfil the research purpose. However, the interview guides varied to some extent depending on the participants' different areas of expertise, i.e. colour forecasting, non-fashion forecasting, and so forth (See Appendix 1 & 2). The protocol questions, as well as the individualized follow-up questions, were sought to be open-ended to avoid directing the responses of participants and to make room for unexpected discoveries. Such an example is: "What comes to mind when you think about sustainability?". Keeping interview questions open-ended is of utmost importance to achieve the main objective of qualitative research since it allows participants to create own meanings for their lives, knowledge and experiences (Yin & Retzlaff, 2013). Without it, researchers will not manage to truly illustrate the research phenomena from the perceptions of participants (ibid.).

3.4.1.1 Selection of participants

Non-probability sampling, common to qualitative research (Morgan, 2012), means selecting samples according to subjective judgement (Saunders, Lewis & Thornhill, 2012). Contrary to the probability sampling technique, where every respondent has the same chance of being selected, purposive sampling is the process where respondents are chosen because they meet the pre-established criteria relevant to answering the research question (Morgan, 2012). Such kind of sampling is practical when working with small amounts of samples (e.g. case studies). In the case of this thesis, respondents were chosen according to their expertise within the forecasting industry. This not only refers to forecasters within the fashion industry (fashion forecasters), but also forecasters whose work is concerned with sustainability questions or future-driven technologies outside of the fashion industry (non-fashion forecasters). The choice of also selecting non-fashion forecasters was founded in the pursuit of securing

unbiased perceptions. It was assumed that fashion forecasters, especially those working with seasonal, aesthetic forecasts, may reject responsibility about sustainability questions.

As the fashion industry in general, and the forecasting industry in particular, can be regarded as secretive and protective of its knowledge, finding an extensive sample of respondents proved challenging. Of the 30 sources contacted, less than half responded with interest. Due to circumstances beyond our control, we lost contact with two promising respondents halfway through our study. The respondents would have given us valuable insights into their work with two online trend forecasting agencies and would have made our data generation richer. Although this is unfortunate, we were able to compensate with an additional content analysis of the online trend forecasting agency, Worth Global Style Network (WGSN).

Geraldine Wharry	Futurist and trend forecaster, founder of Trend Atelier, based in London	Video interview (56 min)
Vivian (anonymized)	Former trend forecaster at French trend agency	Video interview (69 min)
Lotta Ahlvar	Former CEO of the Swedish Fashion Council	Face-to-face interview at The Swedish School of Textiles (25 min)
Sherri Donghia	Chair of Interior Forecast Committee at CAUS, lecturer at Parsons School of Design	Video interview (93 min)
Ulf Boman	Forecaster and consultant at Kairos Future, specializing in sustainable businesses among others	Video interview (49 min)
Magnus Høst	Freelance trend forecaster, and responsible for communication and activation at Homework – a creative direction and design studio in Copenhagen	E-mail interview
Claire Vitteau	Communication Director at Promostyl	E-mail interview
Maria (anonymized)	Executive Manager at colour forecasting agency	E-mail interview

3.4.1.2 Interview practice

In order to generate a rich sample, the recruitment of respondents started as early as possible. E-mails with a description of our study were sent to fashion forecasting agencies that were perceived to have a big share and influence on the fashion market, especially mass-market, e.g. WGSN, Promostyl, Doneger Group, Peclers Paris, Pantone, Trend Union, Color Association of the United States, Stylus, and more. After initial research, fashion academics, independent forecasters and forecasting agencies with a non-fashion focus, who have published about sustainability-related topics, were contacted through email, social media or Linkedin. The recruitment happened over a course of several weeks. The experience gained after our first interviews allowed us to focus on what additional respondents would be suitable to enhance our data generation. We found that our opportunistic approach of contacting a

wide array of sources brought good results. We suspect that the relevance of the sustainability topic helped increase the rate of responses.

There have been eight interviews in total, five taking place either face-to-face or through video call, and three interviews answered through email. Some participants asked to receive questions in advance, which – as with questions answered through email - poses the risk of leading to "made up" or unauthentic responses. Most of the interviews took place through video call or face-to-face and were between 25 and 90 minutes long. The semi-structured interview guides revolved around thematic blocks of questions and all followed a similar sequence. As previously mentioned, we used two standard interview guides addressed to fashion forecasters and non-fashion trend forecasters (See Appendix 1 & 2). The questions were adapted based on the respondents' expertise in certain fields, like colour or sustainability. All interviews started with an introduction, where general questions about professional background were asked, and usually ended with the respondents' personal vision of the future of the forecasting profession.

After asking the respondents permission to record the interview, we introduced ourselves and our work and tried to create a familiar atmosphere, where the respondents would feel comfortable to speak freely. As the interview was usually conducted by two interviewers, one was responsible for leading the interview and the second interviewer took notes and kept an eye on the interview guide to see if any additional questions would arise. By making use of descriptive questioning, like "What comes to your mind when thinking about..", "Can you tell us about…", "How would you describe..", we encouraged the respondent choose to talk about what is most important to them (Taylor et al., 2015). Follow-up questions were generally more directive, often aimed at narrowing the scope when respondents were talking broadly.

The interviewees were given the choice to be anonymized before the interview. This option accommodated respondents who felt inclined to say what he or she thought the interviewer wanted to hear (Browne & Green, 2005). As the face-to-face and video interviews proceeded, we noticed that the potentially sterile question-answer practice turned into a natural conversation, where the interviewers offered their own neutral, non-judgemental thoughts. This created an atmosphere where the interviewees might feel more inclined to talk about his or her personal views instead of describing circumstances. According to Holstein and Gubrium (1995), knowledge is constructed throughout the interview process, where the interviewer is participating in constructing meaning and eliciting the information and attitudes of respondents that are relevant to the study.

3.5 Data analysis

According to Yin and Retzlaff (2013), data analysis consists of five phases; *compilation, dismantle, remount, interpretation,* and *conclusion,* which were followed when analysing our data. The data analysis pursued a thematic analysis approach, aimed at identifying themes through seeking overarching patterns, theoretical constructs, relationships, and commonalities

in our empirical data (Lapadat, 2012). Thematic analysis is suitable for case study research, since it facilitates sense-making of comprehensive data without losing its context (ibid.).

3.5.1 Thematic analysis of interviews

All audio interviews were transcribed either manually or through a transcription software, allowing us to more easily *compile* the data from audio into text form. Whether the transcribing was managed manually or through the software depended on the length and verbosity of the interview conversations. Secondly, the personal and e-mail interview transcripts were *dismantled* through digital colour highlighting and margin commenting which was based on responses considered relevant to the research purpose or that could be recognized in our previous research. Additionally, each researcher subjectively summarised what was believed to be the most prominent "takeaways" from each interview, which summaries were later reviewed together to compare our impressions. Next, the highlighted comments and summaries were used to build a mind map, in order to find themes and patterns, similarities and dissimilarities between the empirical data. Thus, the empirical data was *remounted* and *interpreted*, in which way we found themes recognizable from existing research, as well as new perspectives. This thematically arranged analysis is elaborated on in chapter 4. The final part, *conclusion*, is outlined within the final chapter 5.

3.5.2 Content analysis of WGSN forecasts

After completing the interviews and processing the transcriptions, we felt short of perspectives regarding the online-based trend forecasting model, since we had lost contact with our respondent from WGSN. To compensate for this loss, we conducted a content analysis of WGSN's archive of trend reports from S/S16 to S/S20. We studied environmental sustainability-related content for each year to follow the evolution of the topic, and to look for contradictions in the content within reports of the same year. This content was believed to provide credible information regarding how sustainability is communicated by online-based trend forecasters, and how trend forecasting and sustainability could be compatible. We sought contradictory content to reveal whether trend forecasters communicate sustainability truly because it is crucial for our future, or simply because it is a trend. Contradictory content could, for instance, be to promote the importance of sustainability while also endorsing the trend of opulence, since sustainability calls for conscious decisions while opulence is synonymous with excess.

Due to the vast quantity of trend reports per season, we realized a need to demarcate the website content and look for the reports addressing macro trends. The choice to target macro trend reports was made in the belief that these were most likely to address sustainability, since it is commonly referred to as a macro trend. The structure of the reports changed each year, meaning what was called "Macro Trends" in SS/16 was renamed "Megatrends" in A/W16/17 and "The Vision" for S/S17 and forward, which made the search challenging to some extent.

All macro forecasts from Spring/Summer 2016 to Autumn/Winter 2020/21 were studied. The WGSN macro forecasts generally consist of four different topical sub forecasts, providing four different directions for what could be a trend in two years. Those sub forecasts were subdivided into categories, which comprise of a heading, mood pictures and a description. While we performed keyword searches (sustainable, sustainability) in all four different sub forecasts per season, we did not necessarily analyse all four in-depth. This was done to restrict the scope and because not every topic contained sustainability-related content. The sustainability-related keywords were counted to study if WGSN's focus on sustainability has increased over the years.

The content analysis is structured as followed: The season (first column) was subdivided into the forecast name and the subcategories thereof (second column) that contained sustainability related content. Thereafter, the sustainability-related information from the subcategories was copy-pasted into the third column, namely Content and meaning. Lastly, the Content and meaning was analysed based on our subjective interpretations, which reflections were compiled into the fourth column called Meaning interpretation (See Appendix 3).

Since the content analysis is based on our subjective interpretations, it is key to strengthen its trustworthiness and credibility (Julien, 2012). This was accomplished by seeking both confirmatory and negative examples to demonstrate transparency and objectivity in the process. Confirmatory examples are content which resembles existing research or aligns with the researchers' preconceptions, where negative examples contradict existing research or the researchers' preconceptions. Furthermore, the content analysis provides an additional data generation method which enable methodological triangulation and supports the conclusions drawn. Lastly, having two researchers analyse and agree on the content meaning and interpretations further improves its trustworthiness (ibid.).

3.6 Limitations

Besides the previously mentioned problem of secrecy in the fashion industry that can limit research within fashion, there are other limitations that should be accounted for when evaluating on the methods of this thesis.

Since this thesis relies on the data generated from qualitative interviewing, we cannot assume that what our respondents say during our interview is what they believe or would say in other situations. As opposed to observing participants, interviewing may lack a context vital to understanding participants. For example, some respondents may misunderstand interviewers, or are unwilling or unable to articulate what they mean. On the basis of what has been said, researchers have to make assumptions, which can be incorrect. Since we as researchers are unable to get to know our respondents fully in the short time window of the interview, mutual understanding and an atmosphere, where the respondent feels that he or she can talk freely, can be missing (Taylor et al., 2015).

The fact that we were only able to recruit respondents through email or other messaging, could have influenced the amount of responses we received, since potential informants might

not answer to such contacts (ibid). As was already mentioned in the section Selection of participants (3.4.1.1), there were also circumstances beyond our control that limited the number of responses. The impact that the COVID-19 virus pandemic had on our day-to-day life changed how people worked and what their priorities were. Several potential participants stopped responding after the pandemic forced many countries into a lockdown in Spring 2020. We assume that this happened because of these new circumstances. Unfortunately, this limited the diversity of our informants.

Also, as our intention was to get information about respondents' job and profession, respondents may answer more reluctantly, unwilling to give away intellectual property. The way we as interviewers ask questions about sustainability to forecasters whose job is part of a perpetual consumption cycle, might be perceived as judgemental or accusing. Even though we see the respondents' profession in the context of sustainability critically, we cannot assume that they are also as critical in the interview. Respondents working for a bigger agency may be reluctant to paint their employer in a bad light, moreover they may use the interview as a way to present their work in the best way possible. Just like in any social interaction, informants say different things depending on how they view the interviewer and how they think the interviewer views them. Interviewers are thus also subject to distortions and exaggerations (Taylor et al., 2015). It is thus important to take their answers not as face value but view them critically and in context of their work. However, the role of the interviewer is also to work together with the respondent to illuminate the experience that are of interest to the interviewer (Paget, 1983). In the course of this, the interviewer should strive to create a natural atmosphere where the respondent is likely to express his or her views (Taylor et al., 2015). Creating a neutral, non-judgemental interview atmosphere to get the respondent to talk openly and naturally, but also encountering their answers critically in order to elicit interesting knowledge, posed challenging in this study.

3.7 Ethical considerations

When using social actors as research subjects, alike our interview participants, it is especially important to consider ethical standpoints to ensure participants are comfortable and properly informed about the terms and conditions of their participation. Conducting an ethical research study foremost means that the investigation is not harmful in any way for any of the involved parties (Butler-Kisber, 2010). The initial step of research is to gain access to the research subjects, along with their thoughts and opinions. Attaining true access requires informed consent, which is preferably given through a written statement since it allows both participants and researchers to revisit the terms and conditions whenever desired (ibid.). Therefore, all our participants were provided with a consent form to sign, in accordance with GDPR, that explicitly explained the purpose of our study, how the empirical data would be used, and how the participant preferred to be described and cited in the thesis. It was also clarified that participation is completely voluntary, and even if consent is already given it may be withdrawn at any time. The importance of such ethical statements is to ensure that the participants know their rights of privacy and confidentiality, are fully informed, and feel protected (Butler-Kisber, 2010). In case our participants did not carefully read the consent

form, we repeated its main points during the initial phase of the interview when also asking for permission to audio record.

3.8 Research quality

The central criterion to enhance the research quality of a qualitative study is to argue for its validity, which mainly corresponds to the trustworthiness of qualitative research (Butler-Kisber, 2010). Validity is especially important for qualitative research seeing that it often studies particular cases which seldom count as relevant for generalization (Yin & Retzlaff, 2013). According to Yin and Retzlaff (2013), validity can be strengthened by generating *rich*, *divergent* and *converging* data from diverse sources to enable triangulation. *Rich* data was sought through the pursuit of receiving detailed and varied responses from the interview participants, by asking open-ended questions, and by conducting the interviews without time constraints. Open-ended questions allow participant to freely and thoroughly consider how they perceive trend forecasting and its relationship to sustainability. The generation of *divergent* and *converging* data was empowered by our purposive sampling of interview participants, where the objective was to constitute a selection of forecasters of both similar and distinctive characteristics in order to obtain diverse perceptions as well as to find points of agreement.

Validity is commonly divided into four subcategories; *credibility*, *transferability*, *dependability*, and *confirmability* (Bryman & Bell, 2015). *Credibility* concerns the trustworthiness of research findings and therefore also considers the credibility of the research subjects (ibid.). To enhance credibility, we selected participants considered as 'experts' of the research field, namely trend forecasters, to ensure expertise within the area in order to provide relevant and credible descriptions and reflections about trend forecasting. The choice of also selecting non-fashion forecasters was founded in the pursuit of securing unbiased perceptions, which additionally strengthens the credibility of our findings. Seeing that the trend forecasting business is fuelled by trends (Mackinney-Valentin, 2006), fashion trend forecasters may be unwilling to reproduce the perception of trends, thus also trend forecasting, as counteractive to sustainability, or sharing critical perspectives of their own profession in general. Furthermore, a few of our interview participants wished to be informed in advance about potential questions of discussion. This action allows participants to prepare answers which is harmful in terms of the credibility of their responses. Naturally, this must be taken into account when analysing the responses of these particular participants.

Secondly, although Yin and Retzlaff (2013) imply that qualitative studies are rarely considered appropriate for generalization, it is argued to be incorrect that findings of this kind are not applicable beyond the addressed cases (Frey, 2018). Rather than striving for generalizability, case studies aim for *transferability* where the objective is to generate findings which can be applied onto similar settings. Transferability is connected to the previous criterion, credibility, seeing that the findings must foremost be perceived as trustworthy in order for the case study to count as transferable. (Bryman & Bell, 2015; Frey, 2018). Therefore, our initial step was to use credible sources by selecting participants of vast

experience within forecasting field. Moreover, instead of accessing a large sample, our qualitative case studies access the perceptions of individuals to enable in-depth exploration and enrich the understanding of data. By using social actors as empirical sources, the findings are based on their truths which means that we can only reach as far as analysing patterns of similarity and differences between these individual truths or finding contradictions or affirmations within the narrative of the individual respondent. Thus, the credibility is sought to be reinforced by linking the findings to previous research, and by triangulating the different cases against each other. By doing this, findings could be considered trustworthy for cases of comparable contexts (Frey, 2018).

The third subcategory, *dependability*, advocates transparency of research methods and findings (Bryman & Bell, 2015). Transparency is achieved by making the study accessible through publication, having detailed descriptions of the research process, and document the used data methods to make it possible for outsiders to understand and interpret them (Yin & Retzlaff, 2013). Aligned with this, all interviews were transcribed to avoid data from disappearing in the sea of audio data, as well as to prevent interview responses from being influenced by the subjective interpretations of the researchers. However, the fact that all empirical data cannot be included in the study, means some data will be excluded, and these choices are inevitably influenced by our subjective perceptions of what data are considered most important and relevant.

Confirmability finds its support in studies that are carried out in good faith, which means that the research findings are not affected by personal agendas on behalf of the researchers (Bryman & Bell, 2015). To prevent harming the confirmability, it is in the best interest of the study to discuss researcher reflexivity in order to be honest and transparent about the potential presumptions and biases with which the researchers unintentionally impose the study (Butler-Kisber, 2010). Both researchers of this study are enrolled at the Swedish School of Textiles, pursuing MSc Fashion Management and Marketing, where sustainability permeates most of the studied courses. Because of the heavy emphasis on sustainability, the researchers assume the topic is of increased priority to them compared to the common man. This is believed to have influenced both the choice of thesis topic and possibly also how the findings are interpreted in the analysis. Despite possible presumptions, it is important to us as researchers to not create the perception of accusing or blaming anyone for unsustainable behaviour, but rather to enlighten about the antagonism and compatibilities of sustainability and trend forecasting.

4 Results and analysis

The results and analysis are based on the empirical findings generated through our interviews as well as the content analysis of WGSN forecasts. The chapter is arranged in a thematic sequence, initially analyzing perceptions of sustainability, fashion and trends, followed by the trend forecasting paradox, reflections on influence, collaboration through technology, and the future of forecasting.

4.1 Sustainability through "the eye" of forecasters

In the pursuit of exploring the compatibility of trend forecasting and sustainability, it is essential to present the respondents' reference points concerning sustainability. As sustainability is interpreted differently according to person and context (Beard, 2008; Henninger et al., 2017; Thomas, 2019), the empirical findings showcase widespread perceptions of sustainability, where some respondents discussed the topic from an aesthetic perspective while some emphasized the need for system changes.

4.1.1 From Wabi Sabi to circular systems

One central theme is that the perceptions of sustainability depends on the respondent's role in terms of trend forecasting background or niche. Our initial interview respondent, Sherri Donghia, works as Head of Interior Forecasts for the Color Association of the United States (CAUS), and shares her thoughts on sustainability in the context of colour forecasting:

> When you talk about sustainability this was something we [CAUS] have been talking about for years [...] What do recycled colours look like? It doesn't look like regular colours. It has a depth that has a patina. It is irregular. It has been modeled. It has a real character and it is very Wabi Sabi. [...] There is no dye, it is all natural, but everything is going to be a little different. It doesn't match exactly. (Sherri Donghia, colour forecaster)

Sherri's points of reference when thinking about sustainability in relation to her work concerns dyes of recycled fabrics and natural non-dyed materials. The difficulty in achieving perfect colours nuances through dyeing processes of recycled materials leads to irregularity. Sherri sees beauty in such imperfections and refers to the Japanese aesthetic concept for it: Wabi Sabi[1]. Yet, irregularity conflicts with the intrinsics of colour forecasting - exact colour codes from which companies can dye their textiles. If a sustainable future calls for irregular coloured recycled materials or non-dyed natural colours, where will that leave the current colour forecasting practice of appointing exact colour codes?

> Even though something has all the check marks of being the right thing on those terms. Design, good design is the most important element. It has to be seductive and great design, good design authentic, or forget it. The customers have to say 'Oh, and look it's sustainable'. I have to be attracted to whatever the product is - not just because it checks all the boxes.
> (Sherri Donghia, colour forecaster)

[1] (Wikipedia, 2020) Wabi sabi as the japanese concept of beauty in simplicity characterized by minimalist, imperfect, modeled surfaces

The quote above seems to imply that aesthetic design is prioritized, whereas sustainability is rather viewed as a bonus, because without seduction - consumers will forget about it. This view aligns with theorist Thorstein Veblen, who emphasizes the importance of the desirability of fashion items (Veblen & Banta, 2007). Moreover, this view is interpreted to illustrate a discourse of sustainability, where sustainability appears to not be associated with whatever desirability encompasses.

Our second respondent, Vivian, began working within trend forecasting for a French trend agency in the 1980s, and depicted sustainability through cultural values of fashion. Vivian's personal view entails that environmental consciousness could evolve through understanding the value of art in fashion:

> I want people to see the value, and understand the value of art in fashion, and consider the fact that we have to buy art pieces in fashion, it is not that, but it's a skill and it's something that can be used to higher the level and also to be environmentally conscious.
> (Vivian, former trend forecaster)

Vivian believes that the main issue why the fashion industry is not turning sustainable is because of different views on fashion in our society. If fashion would have been perceived an artform rather than a commodity, fashion would not be over-consumed. As a skilfully made piece of clothing is made of high quality, it would mean it was made to last and can be appreciated for that. Instead, in the current fast fashion system, fashion items are designed through the stimuli of fast-changing trends, creating simulated novelty which aims for obsolescence by ensuring that styles quickly turn dated (Ertekin & Atik, 2015). Accordingly, Vivian believes the vicious cycle of mass-producing clothing, which exhausts resources and creates waste and pollution from discarding, is the main concern for the unsustainability of the fashion system.

Our non-fashion forecaster, Ulf Boman, similarly problematizes the fast fashion system and the unwillingness to pay prices in accordance with a product's required social and environmental resources, while simultaneously demanding more sustainable fashion. Ulf defines it as "We don't walk the talk", which addresses the knowledge-behaviour gap. Valor (2008) states that consumers are struggling between the trade-off between material prosperity and sustainability. This plays into the paradox of fashion being a contributor to unsustainability, and a contributor to prosperity (in societies where it is consumed as well as developing nations societies where it is produced). With further reference to sustainability, Ulf suggests that the fashion industry could learn from other industries, specifically in this statement, designing for disassembly and circular systems:

> [...] you know also mixed materials can be reused to be new fibres to get new textiles but if you don't think about these things from the beginning, if you don't think about how can this coat or shirt or boots or whatever it is, be deconstructed, taken into a circular system. Then it

> is difficult and that is when they [the fashion industry] can learn I think from other industries. (Ulf Boman, non-fashion futurist)

Ulf offers a remedy for the aforementioned problem of discarding fashion addressed by Vivian. Such life cycle thinking would take the traditional production from clothes made for the landfill to a cradle to cradle approach (Fletcher & Tham, 2015). Furthermore, Ulf points out a challenge regarding the general perception of sustainability:

> I think there's a number of challenges. One is the perception of sustainability. Many are talking about sustainable development really means ecological sustainability, also taking into account social, economic sustainability. [...] Another challenge is that people tend to see that there's a lot of costs with working with sustainability. I have the notion that maybe it's vice versa really, but people think it's very costly like we cannot do that.
> (Ulf Boman, non-fashion futurist)

Since sustainable development encompasses not only ecological but economic sustainability, there is a great importance attached to being economically viable (Elkington, 2011). Ulf mentions that it is a challenge that people tend to think that it is very costly to work in a sustainable manner, which he actually believes might be a vice versa situation. Naturally, companies do not want to risk their cost-effective methods to change it to a sustainable one if they believe it will be more costly. However, if the perception of sustainable work processes as costly is just a widely-accepted assumption, the repetition of such discourse actually prevents companies from changing.

> You know it's important within the sustainability conversation that we understand that it's not just about the materials that we encourage clients to extract when we're doing those forecasts that has another trickle-down effect which is towards the workforce and the people that work in the fashion industry which is a huge component of sustainability. And the UN Sustainable Development Goals which many people ignore. (Geraldine Wharry, fashion futurist)

For Geraldine, sustainability is beyond using sustainable materials, since she connects the social implications as well. Geraldine mentions the UN Sustainable Development Goals which the Triple Bottom Line model is a part of. As elaborated in the conceptual framework, sustainable growth is a model that has been criticized by ecological economists as insufficient (Howell, 2011; Elkington, 2011; Daly, 1992). Growth equates to producing and extracting from an environment with finite resources. Instead, seeing the environmental capacity as relative to the social and ecological component, as in the words of Daly's (1992) Steady State Economy, means managing earth's resources so future generations are not disadvantaged. This would then meet the definition of sustainable development after the Brundtland report (1987), which states "to ensure that it meets the needs of the present without compromising the ability of future generations to meet their own needs" (ibid., p.7).

4.1.2 Sustainability as part of mission

In some interviews, it was noted that sustainability played a role as far as influencing decisions about career paths. Proving a deeper connection with sustainability also seemed as a

way of differentiating the forecaster's practice providing better means to criticize less sustainable parts of trend forecasting:

> I just want to start by saying I'm an environmental activist and a member of extinction rebellion. My father is an environmentalist as well I've been raised in that spot and it's been spoon fed to me so it's one of the reasons I also stopped working as a designer, but I just didn't have the words sustainability at the time, but I just couldn't do it the way it was done anymore. (Geraldine Wharry, fashion futurist)

Since Geraldine worked as a designer for many years, deciding to change career path was the right choice in order to live according to her upbringing by an environmentalist father. Being an environmentalist means protecting nature from further damage by human activity[2]. In her case, that means to stop working as a designer, where you would play into a system of creating damage to nature by designing clothes solely to be consumed and discarded, as aligned with Woodward and Fisher (2014) who address this cyclic system's impacts on materiality, where new items replace the previous ones which are thereby discarded.

When asking Magnus Høst, former menswear designer, about his views on trend forecasting and sustainability, he similarly explained to have switched career path for the very reason of sustainability:

> This was actually one of my main reasons towards changing career path from designing clothes to trend forecasting. This allows me to communicate progressive changes on a bigger scope, and to nurture a sustainable direction. (Magnus Høst, freelance trend forecaster)

To him, "trend forecasting plays a major role to depict and inspire to positive changes, and to inform and enlighten on what's next while pushing for more than conventional thinking." This would pose an opposition to academical literature stating that designers are the ones impacting change towards sustainability (Thorpe, 2007; Fletcher & Grose, 2012, Fletcher, 2014). Here, the focus lies on changes made on the product level, like choosing sustainable materials or production methods which reduce impacts on the environment (ibid.). Interpreting Magnus thoughts, he feels he could have a broader impact on other designers to act sustainably by giving the right impulses instead of making these changes in his own work as a designer, which would then "only" have an impact on his design work alone. This perception aligns with Giertz-Mårtenson who argues that the designer is often in focus despite the significant contribution of trend forecasters in creating tomorrow's fashion (Blaszczyk & Wubs, 2018).

When asking Lotta Ahlvar, who used to work as the CEO at the Swedish Fashion Council (SFC), about sustainability in her work, she answered: "We started already 2007 to promote sustainability.", but then followed up to express her disappointment with how long it took for the fashion industry to transform:

[2] (Wikipedia, 2020) Definition for Environmentalist according to Cambridge Dictionary

> I think 2006 and 2007 the Al Gore film came on. And we thought wow this is it. This is going to change the fashion system. [...] But it took a really long time and I really got fed up with everything in 2014. And 2015 I really left the fashion world because I thought nothing was going to happen. It was really the same thing over and over and nobody paid attention.
> (Lotta Ahlvar, former trend forecaster)

As Lotta Ahlvar has worked for H&M and the Swedish Fashion Council for many years, she has become weary from fashion's inability to transform. She mentioned, Al Gore's documentary (An Inconvenient Truth[3]) being perceived as a shake up to start action to change. Fashion scholars like Henninger et al. (2017) point out that the fashion system is slow to change, which is due to fashion's inherent relationship to change. Lotta saw that sustainability was something to reckon with, that it was important to act: "This is it. This is going to change the fashion system." Thus, starting to promote it was an imperative to her. However, the slow conversion into a more sustainable fashion industry was said to be her reason for eventually leaving the industry.

4.2 "Seeing" fashion and trends

It was furthermore believed to be essential to depict the respondents' perceptions of fashion and trends, since such representations could showcase views that are either compatible or paradoxical to imperatives of sustainability. Cases of contradictions will be disclosed in 4.3 The trend forecasting paradox.

4.2.1 Democratization of fashion

> Because fashion in France is a culture, and culture is also work [...] we can't compete with the low price, and that is fashion to the most of the Swedish people [low price fashion]. It's Lindex. It's H&M, but to me that's not fashion. That's mass-consumption.
> (Vivian, former trend forecaster)

Through this statement, Vivian suggests a representation of fashion which does not correspond to what fashion is known as in Sweden, i.e. fast fashion. Also, she immediately distances herself from fast fashion, which gives her the means to criticize it in terms of its unsustainability. Instead, Vivian sees fashion as an artform which it is considered to be in France and believes that lack of culture is why fashion is seen as more of a commodity in Sweden. She further explained: "That was something that went really well with the social democratic system. Everyone had the right to buy cheap." These reflections align with philosophe Gille Lipovetsky's (1994) explanation of fashion as a system which democratized through the Western industrial society and capitalism. Lantz (2018) refers to this system as "democratization of fashion" and suggests that making up-to-date fashion available to "everyone everywhere has made fashion relevant to everyone and no one" (ibid.). The notion of democratization of fashion is believed to also have affected the fashion cycle, i.e. trend shifts, where Geraldine proposes:

[3] (Wikipedia, 2020) Al Gore's documentary brought evidence on man-made climate change

> Don't you think that those seasonal trends are not changing as fast - that we're seeing the same trends over and over again? [...] Everyone can find something to suit their taste. Then, I say yellow has been on trends for years now. Every two seasons the shades slightly changed and so on. I mean, you know like I get that, I get that need for newness.
> (Geraldine Wharry, fashion futurist)

Geraldine's perception of slower trend shifts can be recognized by Mackinney-Valentin (2010) who questions if trends are changing at a slower pace. Geraldine sees the same trends over and over, using yellow as an example. If fashion is facing a decrease in desire for novelty, this would oppose the fundamental concepts of fashion as a cyclic system of novelty (see Barnard, 2014; Black, 2008; Veblen & Banta, 2007). However, the perception of slower trend shifts could also be a result of many coexisting trends, as acknowledged by Mackinney-Valentin (2010) which in turn could be a sign that the supply of trends outpaces actual desire for newness.

The theme of democratization of fashion is also recognized in Lotta's interview where she notes that fashion has lost its means of being fashionable, and that people have found new ways to portray status than through clothing:

> I think it's democratic in a way, but it's still also like there is an elite. But I think the future trend will be like that the people that really can afford, they will custom make their wear, really bespoke objects, like really personalized. So, there will always be a level that will differ. [...] You eat eco, you work out and you sleep well. I mean those are high statues things. And clothing you can't really get that high-status thing anymore.
> (Lotta Ahlvar, former trend forecaster)

Through the emergence of mass-production, fashion became democratised and more accessible, hence less bound to one's economic status (Crane, 2000), as it once was a means for the wealthy to portray status (Lipovetsky, 1994). 'Democratization' suggests that the hierarchal stratas' of the fashion system ought to be eroded somehow (ibid.). However, Lotta believes the 'elite' will just find other approaches to differentiate their status than through the newest trends, i.e. bespoke garments, healthy lifestyle, and so forth. Furthermore, Lotta probes the challenging landscape of today's trend forecasters, due to the democratization of fashion together with the development of social media:

> I think it's much more difficult actually for the people in the business now because everything is out there, everything is OK, everything is allowed. [...] Only one trend matters is sustainability. (Lotta Ahlvar, former trend forecaster)

Lotta shared how the Swedish Fashion Council used to create their trend reports and admitted that it used to be a lucrative business, but concluded with noting that the way it used to be done is not viable anymore due to social media making a diversity of styles visible online: "Now, I mean, you could just click through Pinterest and you find like super trendy stuff". These reflections are similarly depicted by Gaimster (2012), who implies that technological

developments have increased the speed and information flows, making trend insights available to anyone. Gaimster (2012) probes the challenging landscape of trend forecasting in the fast-paced fashion industry and proposes forecasters to adapt through improving short-term forecasting. A fast-changing fashion cycle has direct impact on materiality, since new items replace the previous ones which are hence discarded (Woodward & Fisher, 2014). Therefore, adapting to this fast fashion cycle seems to be an opposite strategy for making trend forecasting more compatible with sustainability, which 'trend' is said to be the only one of matter.

4.2.2 Forecasting sustainability versus sustainable forecasting

The empirical findings have clarified that the discussion about sustainability and trend forecasting is also a discussion about short-term versus long-term forecasting. When the respondents depicted time aspects of trends and trend forecasting, it appeared a shared perception that long-term (i.e. macro) trends and forecasting practices are more compatible with sustainability. So, even though the macro forecasts of WGSN often forecasted sustainability as a trend, their practice of providing macro forecasts every two years in fact appeared short-term. Hence, this theme illustrates the noticed difference of sustainable trend forecasting and forecasting sustainability as a trend.

> For us [Kairos Future], a trend is not a short-term fashion. It's not fast. We differ when we talk about trends. We talk about long-term changes in society [...] In our vocabulary fashion trends are more fast. (Ulf Boman, non-fashion futurist)

Early on in the interview, Ulf made it a point to differentiate his work from the work of a fashion forecaster by noting different perceptions about how long a trend lasts. Here, he distinguishes between seasonal (i.e. short-term) fashion fads and long-term movements in society which will likely influence the future. According to Brannon (2005), long-term forecasts encourage people to look further ahead, which can point out potential future threats, i.e. resource depletion. Thus, Ulf's futuristic approach to forecasting appears to better prepare his clients to future scenarios, such as how to adjust to sustainable practices.

> Now, I'm known more as a futurist because my work encompasses much more than design trends. In fact, I don't really provide a design trend forecasting service anymore. That [my work] was really just focused on macro trends and cultural and behavioural shifts.
> (Geraldine Wharry, fashion futurist)

Geraldine also perceives fashion trends (i.e. design trends) to be short-term, which trends are of main interest to fashion clients. As analysed with Ulf's quote above, Geraldine differentiate her forecasting role with the same futuristic approach as Ulf, probably to distinguish the representation of her work from short-term trend forecasting since it would not correspond well to her environmentalist pursuits. On that note, Geraldine refers to the work she did for the online trend forecasting agency WGSN as opposed to what she does now:

> I used to do what they [WGSN] call macro collections, which forecast up to two years ahead, but that is not what I call macro trends, they actually start five to ten years ahead.
> (Geraldine Wharry, fashion futurist)

Geraldine's perceives macro trends forecasting as predicting five to ten years ahead, instead of WGSN's time span of every two years. This differs from Burns, Mullet and Bryant (2016) who describe long-term forecasts as made one to five years ahead of season, while short-term predicts trends one year ahead or less. This statement is confirmed by the content analysis of WGSN macro forecasts (See Appendix 3), created two years ahead of season. Although WGSN may predict consumer behaviours and demands that may be of importance in that season, their focus lies on describing the design details of garments; giving insights into fabric innovations or advise on how to market a product in order to accommodate consumer wants. This practice is consistent with how literature defines the role of a trend forecasting, i.e. to provide clients with information about upcoming trends in colour, fabric, and silhouette (Rousso & Ostroff, 2018; Perna, 1987). However, this definition does not address different time aspects involved in different types of trend forecasting practices. Still, WGSN's practice resembles a short-term approach as compared with what Ulf and Geraldine refer to when talking about long-term or macro-forecasts. Sometimes, Ulf goes as far as foresighting macro trends fifteen years ahead. When asked about what he would advise a fashion client, he says:

> I would say, the advice is, look further ahead than your normal kind of 1-2 years cycle, because companies that do prepare for a longer-term future, say in five to ten - or even 15 years. They are much more likely to succeed. Sustainability is something that is not just done on a coffee break. (Ulf Boman, non-fashion futurist)

Researchers like Vergragt and Quist (2011) or Tham (2008) have similarly proposed working with long-term forecasting if your aim is to further sustainability. One example is the method of backcasting in order to not only forecast but achieve a sustainable future. Assuming that climate change will impact how the client's future will look, the forecaster can help with envisioning a preferable scenario and based on that, strategize how to achieve this sustainable future by solving the problems backwards (Vergragt & Quist, 2011). By doing so, forecasting could be an important tool in creating valuable sustainability strategies.

Returning to the WGSN macro forecasts, they undoubtedly contain sustainability-related content, informing clients that consumers will call for more transparency and sustainable fashion (See Appendix 3). Yet, as Ulf points out, such short-term forecasts do not prepare for a long-term future. It seems simple for WGSN to declare probable future demands for sustainability, but if it is just a "reminder" every two years, it may not be internalized by clients of how pressing the topic actually is. As the content analysis shows, sustainability has been an on and off topic in WGSN's forecasts, not necessarily forming a red line throughout their macro forecasts. Both Summer and Winter forecasts in 2017 ("Encounter Culture" and "Design Matters") had a strong feature on sustainable production. By referring to designers making use of alternative methods, like algae-based dyes or energy harnessing conductive dyes, WGSN pushes the sustainability discussion beyond recycling or eco-friendly fabrics.

However, the following two seasons of 2018 forecasts lack to follow up on the previously developed sustainability narrative. As every WGSN macro forecast builds on the former, the topic "Kinship" and "Slow Futures" were said to evolve from the 2017 theme "Design Matters". Aside from a mention of minimalism, there was no further development of the topic (See Appendix 3 & 4). Coming back to Ulf's comment, if the forecaster does not show the same focus on a topic requiring a long-term view like sustainability, the client may disregard it as being urgent, now focussing on whatever WGSN is thematizing in this season's forecast. "Sustainability cannot be decided on a coffee break", implies that the forecaster ought to show a continual forecasting story in order to give a straightforward advice into the right direction.

This pattern of incongruence between sustainability forecasted as a trend while giving seasonal design directions shows the paradox that is inherent to fashion and sustainability. Sustainable forecasting according to Ulf would mean to advise a long-term focus on a scenario that envisions sustainable practices as a goal. The next chapter will discuss this paradoxical relationship further.

4.3 The trend forecasting paradox

This theme is central to this study and involves narratives verifying the presence of a trend forecasting paradox. Verifications refers to exemplifying narratives of contradictory character or by narratives stating the friction between trend forecasting and sustainability.

> I can see the struggles even at WGSN. They are doing some really interesting sustainability reports highlighting the leadership and just all the exciting things coming out of that space. But then, they're still doing all these posts about neon green. The next key colour. Do you know how toxic the dyes used to achieve that neon green is? Or iridescent is the new trend. Do you know how toxic that finishes for iridescent finishes are?
> (Geraldine Wharry, fashion futurist)

Geraldine's quote supports what the initial supposition of this study was, namely the paradox of sustainable trend forecasting. Sustainability is appointed a "megatrend" (Mittelstaedt, et al., 2014), thus a wide array of forecasters increasingly promotes this trend. WGSN, as a market leader in the trend forecasting industry, mentions it as well with "Sustainability Bulletins" for each month or information about sustainable innovation, sustainable sourcing guides[4], and by communicating sustainability in their macro forecasts (See Appendix 3). What Geraldine describes as a "struggle" is the confusion coming out of WGSN's ambiguous messages. Standing between two opposites: fuelling fashion cycles with daily updates about the next "key-items" or the mentioned toxic dyeing practices[5], while still pushing the sustainability narrative in its macro forecasts. The WGSN forecasts from 2018 to 2020 communicate sustainability as a prerequisite: creating raw materials from waste ("HumanNature"), high quality, multi-purpose garments for long-term use ("Purpose Full") or shifting garment lifecycles from disposable to renewable ways ("Fix the Future") (See Appendix 3). The chart

[4] WGSN content board for sustainability
[5] WGSN content board key items

below displays an extract from our content analysis of WGSN forecasts, showcasing content related to Geraldine's comment about forecasts, namely highlighting sustainability issues while also promoting aesthetical features which call for unsustainable manufacturing processes, i.e. iridescent surfaces.

Season	Trends (Forecast name and category name)	Content and meaning	Meaning interpretation
Women's & Young Women's Forecast S/S 20:	Code create	Hyperreal: **Iridescent surfaces** work well with a digital lens. Tap into social-media-savvy mindsets with illusory finishes.	Iridescent surfaces: such finishes are usually toxic and not exactly sustainable

Table 1. Extract from content analysis of WGSN forecasts: Iridescent surfaces

The chart below shows another extract from the content analysis of WGSN that illustrates an example of paradoxical content in macro trends forecasted in the same season. In S/S20, WGSN disclosed a macro trend called "Sustainability Matters", communicating that sustainability is a topic of increased interest and is essential to consider achieving brand success in 2020. It further described the harmful impacts of the textile industry, especially water pollution as a result of dyeing processes. However, in another 2020 macro trend, named "Embrace Maximalism", WGSN explains that maximalism will make a comeback through playful colours and textures, and is a reaction to the persistent trend of minimalism. Using words like "Excess" and "More is more", WGSN furthers this trend of opulence which seems distant from the consciousness that was promoted through "Sustainability Matters" (See Appendix 4).

Season	Trends (Forecast name and category name)	Content and meaning	Meaning interpretation
Big Ideas S/S20:	Sustainability Matters vs. Embrace Extremism	Sustainability Matters: The conversation around **sustainability is growing louder**, and will be a key element of brand success in 2020 and beyond. Currently, one fifth of the world's water pollution is a direct result of industrial textile **dyeing processes, so colour is a major part of the conversation around environmental ethics**, and international legislation is beginning to recognise this. Embrace Extremism:Expect a shift towards maximalism in 2020, referencing 1980s excess, and moving away from the pared-down palettes popularised by trends such as hygge. **At the start of a new decade, playful colour, pattern and texture will reign supreme. More is more here.**	More is more. Excess. Maximalism as a reaction to minimalism. They are all words of contradiction to sustainability.

Table 2. Extract from content analysis of WGSN forecasts: Sustainability versus maximalism

Payne (2013) characterizes trend forecasters as a barrier, preventing the implementation of genuine sustainability in the fast fashion market. In her study she detects designers closely following WGSN's trend reports. Ultimately this leads to dyes, textiles and advised garment

construction being translated uncritically by clients using the service. (ibid.) What can be inferred from this is that WGSN's sustainability advises cannot be sustainably compatible as long as the forecasting agency is still promoting seasonal trends that require toxic manufacturing methods. We looked for additional evidence to support Geraldine's introductory statement, and found that in the Young Women's Summer forecast of 2020 that "iridescent surfaces" was a part of the trend story (See Appendix 4). These examples are not to claim that WGSN is contradictory in all its forecasts, but rather to provide a perspective on our respondent's comment.

In another conversation, neon colours came up as a topic as well. Sherri's quotation below furthers her thoughts on forecasting as providing means to make something look new. As such, the colour neon is, in her opinion, a way to make garments or interior details look contemporary:

> Neon is here to stay [...] Everyone should have neon in their line all the time and I'm always pushing to have neon in our colour cards in some way. It's very current.
> (Sherri Donghia, colour forecaster)

In her view, CAUS should have the colour neon in every forecast, "lime green or hot pink or bright orange - it makes it look 21st century", though in the same train of thoughts she acknowledges its unsustainable ways of production: "But it's very difficult to create neon in a sustainable way." Brilliant-fluorescent colours, also called neon colours, are known to have a significant environmental impact in the production process of the garment[6], however they are still heavily promoted by colour forecasters as Sherri's statement shows. Sherri mentioned previously what sustainability is to her: natural dyes, imperfect colours and recycled fabrics (as mentioned in 4.1.1). However, her idea that the future looks neon would contradict a future where naturally dyed fabrics would persist. Seeing how enthusiastic she was about the topic of neon colours, we asked: "Why do you think neon is so popular at the moment?" Her answer being: "I don't know but it's fabulous". This answer appeared puzzling, since it suggests that there was an absence of reflection regarding the promoted colours. Since it was previously acknowledged that neon was not sustainable, it raises questions about priorities: sustainability or newness? As stated by Cassidy (2017), colour forecasting is the most prominent tool for driving sales of fashion items through planned obsolescence. So, even if colour forecasters educate what recycled colours look like, continuously promoting not only new, but toxic colours, would negate the former. Accordingly, Payne (2011) suggests that trend agencies eschew sustainability by not promoting aesthetics which call for unethical processes (i.e. harmful dyeing chemicals).

When asking Vivian for thoughts on trend forecasting and sustainability, she refers to her previous work at the French trend agency where she was responsible for sustainability-related trend books. According to her, mitigating the environmental impacts of fashion was a natural

[6] Best, J., 2017. Colour Design - Theories and Applications (2nd Edition).

part of forecasting, and she shared that H&M took the agency's advice on introducing ecological materials in their lines:

> In 1989 when we first put out the environment question [...] that was when I also introduced the idea to H&M, and it was the first time they hinted ecological materials in their production. (Vivian, former trend forecaster)

Seeing that H&M seemingly followed the advices from their agency, it displays that trend forecasting can be a resource contributing to sustainability by promoting ethical processes (Payne, 2013). On the other hand, it also confirms the influential role trend forecasting carries in significantly determining the future of fashion (Blaszczyk & Wubs, 2018). Hence, trend forecasting can lead to both positive and negative outcomes depending on whether the directives contain matters of sustainability or not. Granting Vivian's positive contributions when working with the sustainability-related trend books, an inconsistency was revealed when discussing different types of trend agencies:

> Interviewer: There are a lot of different forecasting agencies, like online agencies that are more adapting to this fast fashion society.
>
> Vivian: We never did that [at the agency], we never followed, how do you say [...] We wanted our followers, but we didn't want to follow our followers, if you understand what I mean. [...] But of course, clients demanded news every season, so we did that.

By stating this, Vivian seems to imply that the trend agency wanted to be at the forefront in terms of predicting the future without interference from clients and consumer demands. Thereupon, she explains that they provided clients with new trend books every season because clients demanded it, interfering with the statement that the agency did not follow their followers (i.e. clients). This inconsistency is recognized in the literature of Cassidy (2017) who claims that sustainable forecasting is hindered by clients' demands for seasonal newness. Due to this, trend forecasters saturate clients with newness by appointing new trends, and thus continue to drive the fashion cycle (ibid.). Furthermore, Vivian explains that a trend was a long-term change, which perception poses contrary to the practice of providing new trends on a seasonal basis:

> I mean, a trend for us, was a long-term change – not from one day to another. That was also the idea about everything with forecasting. That a trend is a long movement. A trend can continue for 20-30 years. (Vivian, former trend forecaster)

Similar to Vivian's description of trends, Sherri mentioned that the colours cards provided by CAUS are relevant for much longer than once a year: "It doesn't matter that it's once a year. It's very relevant for much longer time than the dates that are on the card". Still, forecasts are being published contrary to our respondent's perception of how long newness is "relevant", presumably in the pursuit of commercial success. Why continue to predict new trends on a seasonal basis if the trends are active for much longer? This brings one back to the inherent obsolescence of fashion's constant change (Black, 2008), as well as the debate concerning

whether trends are created or by trend forecasters or if they are forecasted because they are active (Lantz, 2018). Seeing that the business model of trend forecasting is verified to align with "the fashion paradox", there are compelling indications that this study demonstrates the existence of a trend forecasting paradox.

4.4 Reflections on influence

Although it is not our goal to ascribe responsibility for sustainability to one particular stakeholder in the fashion industry, the "who is responsible" question inevitably came up in our interviews. Some saw it as the consumers' responsibility to demand sustainability and thus oblige fashion companies to change, while others believed fashion companies (especially mass-producers) had to "get their shit together". Assuming that such perceptions speaks to the respondents' views of "who is responsible", this theme analyses realization of influence of trend forecasting, since this theme appears to correlate with the way our respondents respectively work with sustainability.

Knowing that the fashion system is built upon collective activities generating the future of fashion (Blaszczyk & Wubs, 2018), Giertz-Mårtensson (2018) believes the trend forecasting profession has passed by relatively unnoticed despite its noteworthy contributions in creating tomorrow's fashion. Furthermore, Tham's (2008) dissertation shows that trend forecasting is the most influential driver of mass-market fashion, which altogether suggest that trend forecasting has some responsibility considerations to maintain. Connected to the influence of trend forecasters, Lotta said:

> I think the guides we [Swedish Fashion Council] printed, they really had a big impact on what the fashion looked in Sweden, it did. [...] I think it's a game hidden behind the scenes many times. Because, there are many fashion forecasters that are involved in the designing process, what kind of merchandising to buy. (Lotta Ahlvar, former trend forecaster)

Through this statement, Lotta realizes the influence of trend forecasters since they are often involved in design and buying processes which directly impact fashion output. This outspoken influence can be linked to Lantz (2018) who resembles trend forecasters as tastemakers since the way they communicate trends frames how clients interpret them. Citing "I think it's a game hidden behind the scenes many times" associates to literature describing trend forecasters attempt of avoiding being represented as directive, since this would add on to the debate of forecasting's self-fulfilling prophecies (Lantz, 2018). The freelancing forecaster Magnus described his position as an independent forecaster as limited compared to "large trend forecasting agencies like WGSN, Nelly Rodi, PEJ Gruppen [who] have big responsibilities towards these subjects.". Additionally, Geraldine shared an anecdote from the times when she worked at WGSN, related to the topic of self-fulfilling forecasts:

> And so, I, we [WGSN] used to do these future forward collection sketches. People could download them. And I remember one thing in Topshop they used to have this brand called the "Unique". I just picked up this bomber jacket. I was like, oh my God, I made this. And I was

> like, well you know, flattering but also like weird at all. You're supposed to be this super creative you know. (Geraldine Wharry, fashion futurist)

As Geraldine was responsible for drawing the technical flats that WGSN offers its clients, this anecdote shows how uncritically clients sometimes translate forecasts. As Payne (2013) points out, following forecasts so closely can also lead to unsustainable design features being adopted without considering the environmental impact. As an environmentalist, Geraldine is not resistant sharing her views on the responsibility of trend forecasting, as she certainly sees the entire course of events which can be an influence of the forecasting practice:

> You've got to be radical and take your position as a forecaster as one of power and strong responsibility because literally you are informing thousands of brands on what they should do. [...] So, as a forecasting agency, if you're really promoting a fast fashion agenda of churning out trends, capsule collections over and over and over, you're not just hurting the planet you're hurting the suppliers that are being squeezed for margins who then can't pay their people. A lot of that workforce is female. And when they can't make enough money, they end up in the sex trade. There are huge implications. (Geraldine Wharry, fashion futurist)

Here, Geraldine realizes both the environmental and social consequences which trend forecasting potentially could result in, especially those pursuing a fast fashion agenda. Since trend forecasting aligns with the inherent obsolescence of fashion's constant change, the mentioned implications can be connected to Black's (2008) 'fashion paradox', wherein both imperatives of sustainability and social justice are considered challenging to achieve. Another aspect of responsibility arose while Sherri was talking about who is in charge for the forecasts at CAUS. The forecasting committee was explained to constitute of professionals having many years of experience in design and are thus older.

> You need some experience. But I do think young people are so much more educated today like you guys than my generation. [...] But, the other thing about your generation that I think is really great for my experience. You want to give back from now, you want to do things to make humanity better. And, it's my generation that is giving back after they're successful [...] I have a great admiration for your generation. Because, you know, you're more tuned in and the bigger challenges than what we had. (Sherri Donghia, colour forecaster)

Sherri often mentioned how great she thought of the younger generations, which she depicted to be the remedy for the fashion industry. Identifying herself with the "older generation", which gives back "only after being successful" puts them opposite to the "younger generation". While emphasizing the need for younger people in her field, she furthered the importance of vast experience to work as a forecaster, as aligned with Rousso and Ostroff (2018) claiming that extensive experience is crucial to be able to predict the future. Although experience is essential to forecasting, would trend forecasters possibly operate more sustainably by employing young people with a sustainability-driven mindset?

After the interview with Sherri, we got in contact with an executive director at a colour forecasting agency who, due to request for anonymity, is given the fictive name Maria. Maria

responded to our questions containing the word "sustainability" by saying she did not understand the connection to her work. As soon as sustainability was framed as environmental matters, she answered "it has been [a] parkour [in] our committee discussion" so it can be assumed she understood what was appointed and that environmental sustainability indeed was a topic of discussion at her company. It being a "parkour" implies it to be a difficult topic to tackle, and it is interpreted to be perceived hard to combine sustainability with colour forecasting. The question if she is satisfied with her personal involvement in sustainable matters, she answered "not really personally". If a forecaster is not involved with sustainability personally, it might not be realized as an important aspect to integrate into the company strategy either. The way Maria approached our questions shows that the discussion of sustainability and trend forecasting is a controversial one.

4.5 An uncertain future calls for customized and farsighted forecasts

A vision that was shared by several respondents is that general forecasts (non-tailored trend reports) will have to change to become more tailored according to specific segments or client's needs:

> It has to change all the way. Everything else is changing. And the good ones, they really customize for their clients. But I think if you're going to go into it, you have to be able to work one-on-one on specific projects as a consulting agency not just a general trend forecaster. Some people don't need you to show them what's on the runways. You can see that yourself online. So being able to adapt to it. I think you need that person who has the big picture from the trend forecasting agency, to work one-on-one with people in your company on particular projects. So, you should be able to cherry pick from trend forecasting, colour forecasting, when you need it for projects. I think it needs to be uniquely focused on a client and a project. That is going to be the most effective way to do it for the best results.
> (Sherri Donghia, colour forecaster)

> You could also say, to communicate, to only communicate with the company. You don't really have to have a title if you have a dialogue going forward with different companies. [...] You cannot limit yourself, that is so important to realise that. So, don't get hung up on getting into only one field. (Vivian, former trend forecaster)

Sherri believes general forecasts will become obsolete as "everyone can see trends online", while Vivian focus more on the importance of one-to-one dialogue and to not be limited to one field as a forecaster. Future forecasters may not only work in one specific forecasting area but rather have to apply knowledge to clients' specific needs. Trend forecasting will then have to focus on giving a service that suits the company's product range. Thorpe (2007) points out that the company-end-user participation in the design process leads to a greater commitment to the final outcome. This could possibly be applied to a company-stakeholder collaboration, making customized trend forecasts more meaningful to clients. Customized trend forecasts suggest more directive forecasting practices, as opposed to the current attempt of working for inspirational purposes (Lantz, 2018). Implementing customized forecasts would thus bring

along a larger influence, where it becomes even more important to ensure that the forecasts do not appoint trends calling for unethical processes, as aligned with Payne (2011). Ulf, who already works with customized forecasting, thought collaboration with clients was a given, seeing that clients specifically approach Kairos Future to tackle certain problems:

> We start with some kind of focal question that is of interest to the client and then we search for trends or factors that will affect or influence this focal question. [...] Foresighting is, I think, really important way of working for sustainability because we can enlighten the clients saying that possibly, the future will develop this way [...] We can describe a scenario that is plausible and probable and also challenging to them and say, you behave well you can change things and you can be on top of things. But if you just keep on doing what you're doing, business as usual, you're going to be really in big trouble. (Ulf Boman, non-fashion futurist)

Here, "foresighting" is used as an aid in order to imagine future scenarios that may influence the client's future. By envisioning future scenarios, forecasting could predict optimistic events and warn about future threats (Brannon, 2005). In that way, clients could be better prepared for whatever the future awaits and also become more prone to handle such issues (ibid.), e.g. environmental concerns. Ulf emphasizes scenario planning as means of faster change into sustainable actions and sees the need of the client being part of the foresighting process to better learn from it. However, Ulf also notes a dilemma of scenario planning, suggesting it can have opposite effects for some companies. A company visualizing a scenario far into the future may not see its urgency. Ulf also notes that times of uncertainty increase interest about future insights. Geraldine mentions the same pattern of uncertainty impacting the popularity of fashion forecasting:

> We see now in times of great turbulence globally, that this [foresighting] is more needed and people are actively trying to figure out what is going on and what will happen in 5-10 years. We know for certain that we will have climate change and global warming [...] and we need to acknowledge these uncertainties because those help us to prepare for the future.
> (Ulf Boman, non-fashion futurist)

> In times of great uncertainty people gravitate towards organizations that tell them exactly what to do because they have a crisis of certainty. [...] After 2008, after the recession, fashion forecasting just exploded because every brand was terrified of making the wrong decision. (Geraldine Wharry, fashion futurist)

The above-mentioned economic recession is said to be the reason why fashion forecasting has come to play a greater role in impacting what fashion companies are doing. At that time, trend forecasters became "insurance companies" (Lantz, 2018) to fashion companies who were afraid to lose money by making the wrong decisions. According to Tham (2008), forecasts are also used to validate the design decisions of a designer in that they will generate a profit, since an external party has forecasted the same design details.

> But, I mean, a likely future scenario is that we're going to run into this problem [resource scarcity]. So, in that sense, forecasting has a great role to play. But it also has a lot of housecleaning to do in terms of fashion forecasting. (Geraldine Wharry, fashion futurist)

The previously mentioned scenario of global warming depicted by Ulf, is consistent with the resource scarcity that Geraldine is referring to above. Unpredictability and uncertainty come together with the scenario that water may be a scarce resource in the future. Fashion companies are dependent on such resources since they are inherently connected to the production of fabrics, such as cotton (Kent, 2019). Thus, it would pose a business case for sustainability that the fashion industry changes its ways to implement more sustainable measures in order to mitigate the scenario of resource scarcity.

4.6 Visualizing the future through technology

> Technology is a tool for us right. Don't ever forget that [...] If you trust technology, that the technology will take you elsewhere. I don't believe it [...] For them [companies who rely on new technology], that's the only way to be modern [...] That's quite scary.
> (Vivian, former trend forecaster)

> I think that is a bit scary. I really like the way that when you work with trend forecasting, that you add something from yourself, and if you only work with the consumer. I think, I think it was then I learned editor in chief for Vogue. She said you should never give people what they want, you should give them what they don't wear and use it. [...] Fashion is going to become so boring because people don't know what they want. So I'm critical to that [using new technology]. (Lotta Ahlvar, former trend forecaster)

According to Giri, Jain & Bruniaux (2019) fashion professionals are sceptical towards new technology and how to benefit from it. The above-mentioned quotes disclose such scepticism where Vivian and Lotta use the word *scary* to describe their attitudes towards integrating technology into the trend forecasting practice. Technology described as "the only way to be modern" shows a disbelief, and that "fashion is going to become so boring because people don't know what they want" implies that it is perceived essential for fashion to be progressive to not be boring, aligned with fashion's intrinsic crave for novelty (Mackinney-Valentin, 2006). Hence, these perceptions are not only of low compatibility with imperatives of sustainability (Black, 2008), but the implied scepticism also prevents new technologies from aiding collaboration (Giri, Jain & Bruniaux, 2019). In the insular fashion industry (Obergón, 2012), technological innovations could facilitate collaboration and thereby the strive towards the common goal of sustainability (Scaturro, 2008).

Contrary to the scepticism implied above, Ulf says he already works with AI to scan social media pictures and spot trends and envisions augmented reality (AR) will play a significant role in the future. Magnus likewise recognizes the potential benefits of using virtual reality (VR) and AR as forecasting tools to make future scenarios more conceivable:

> I think it is important to use these types of technologies [AI and big data] and methodologies to understand better the future and do better foresighting [...] AI definitely, and also other technologies such as Augmented Reality and stuff like that, will I say play enormous role in our future role [as forecasters]. [...]" Augmented Reality can show what a future could look like and make it more understandable. (Ulf Boman, non-fashion futurist)

> Big data and AI will definitely change the landscape within trend forecasting in terms of outlining comprehensive predictions. On that note, I don't use any of the mentioned technologies, though I imagine VR and AR as interesting tools in portraying and visualize future scenarios. (Magnus Høst, freelance trend forecaster)

As such, technologies could elevate the work of a forecaster by making it more efficient. Not only by making scanning of vast amounts of data easier and faster, but also by acting as a tool for making forecasts "more understandable". Ulf mentions AR as a tool for visualizing possible futures to clients. The technology can create a palpable (e.g. with haptic, auditory, somatosensory or olfactory information[7]) feel for reality, making it feel realistic to a client - something that is important in Ulf's argumentation, since understanding brings greater engagement with it. Without understanding the depth of the problem, the client may not act on it. Thorpe (2007) pointed to the superficial consumption of "visuality" as a barrier to adopting sustainability, however AR would circumvent the superficial and encourage deeper engagement with the visual. In that way, technology could improve the compatibility of trend forecasting with sustainability.

4.7 The future obsolescence of trend forecasting?

> This idea of singularity and how at the end of this decade we are expected to reach technological singularity. We got the moment technology doubles around every 14 months a couple years ago it was every five years. It's expanding. So it's expected that by 2029 technology will be doubling itself every day. So, this idea of something sort of flat lining now becoming equal. Is that going to also happen in other aspects of society? Where everything sort of changes so fast that it stops being a thing? (Geraldine Wharry, fashion futurist)

In a point in time where technology advances itself in the course of a day, what would our society look like? Would society change just as fast as its technologies or would it instead leave trends like fashions in dress unchanged? As Geraldine mentions resource scarcity, this may also impact the look of fashion in the future: "It might not even be something that is a choice. It might be out of necessity because there's just a lot of people on this planet - a lot of people to dress and we don't have the resources anymore". Ultimately, Geraldine concludes that external trend forecasters will not exist as they are today:

> I think my job will not exist eventually. I think it will exist in a way if long term trends become more and more adopted technically that is something that brands internally can learn how to do themselves.[...] where internally they're hiring philosophers, anthropologists,

[7] Wikipedia (2020) definition: Augmented Reality

> futurists [...] integrating that type of purpose-built long term thinking in everything that they do. I mean that's like that would be amazing right. And that's maybe like a fantasy world but when you're looking at very long-term trends you need to kind of envision the negative possibilities but also put a preferable future forward as well to show people the possibilities. (Geraldine Wharry, fashion futurist)

In contrast to Geraldine's vision, the trend forecasting agency Promostyl sees fashion forecasting as part of the fashion industry for many years to come: "I think the forecast of fashion trends still has long years ahead, mainly because trend books are essential tools for brands" (Claire, Promostyl).

5 Concluding discussion

This final chapter will discuss the main findings in comparison to previous research and answer the research questions in order to fulfill the purpose of this thesis. Thereafter, managerial implications and research contributions will be presented, as well as suggestions for future research.

5.1 Conclusion

The purpose of this study has been to explore how trend forecasters perceive environmental sustainability and the role of trend forecasting in the fashion system. Based on these perceptions, this study has sought the compatibility of trend forecasting and environmental sustainability. This study has demonstrated wide-ranging perceptions of sustainability, from aesthetic features to circular systems, where the analysis clarified that the perception is a question of each respondent's role in terms of trend forecasting background and niche. Namely, the role mirrors the perception of sustainability (e.g. natural colours by colour forecaster), which finding is reinforced by Thomas (2019) showing that sustainability is interpreted differently according to person and context. Most of our respondents distanced themselves from unsustainable fashion at an early stage, which seemed to be a way of giving better means to criticize it. However, through the analysis of findings, some respondents shared narratives of contradiction (as shown in 4.3 The trend forecasting paradox), while others validated their perceptions of sustainability through coherent narratives. Furthermore, the perceptions of the role of trend forecasting as a part of the fashion system interrelated with how greatly sustainability was emphasized by the respondents. Specifically, the more the respondents emphasized the influence of trend forecasting; the more sustainability was part of their mission. Correspondingly, the respondents with less reflections on the influence of trend forecasting were also the ones who provided the most paradoxical narratives. By not realizing influence, trend forecasters seem less likely to incorporate sustainability as part of their mission, hence, realization of influence is concluded as a fundamental requirement for trend forecasting to be compatible with sustainability. However, our findings show that sustainability has become a mission for some trend forecasters, which differs from the most recent research within this area by Muvira (2015), who concludes the opposite.

Our central discovery concerns the validation of an existing trend forecasting paradox. The practice of furthering trends calling for unsustainable processes (e.g. neon colours, iridescent finishes, maximalism) presents as contrary to the imperatives of environmental sustainability. This finding is supported by Payne (2011) who probes the practice of promoting trends requiring unethical processes. The trend forecasting paradox also encompasses the issue of trend forecasters' striving for sustainability while still publishing short-term forecasts because their clients demand newness. This inconsistency was noted by Cassidy (2017), implying that clients would question the service paid for if forecasts would not progress from the previous. Beyond this, a trend was perceived to be relevant for longer than it dates, implying that trend forecasts are published contrary to the perceived longevity of trends, reinforcing the belief that the trend forecasting industry is reliant on the desire for novelty (Mackinney-Valentin,

2006). Similar to how Sandy Black (2008) frames her "fashion paradox" – we suggest framing the trend forecasting paradox as; how to reconcile trend forecasting's dependence on the inherent obsolescence of fashion's constant change with the imperatives of environmental sustainability?

The intrinsic pursuit of novelty has impacts on materiality since new trend items will replace the previous items which are hence discarded (Woodward & Fisher, 2014). Re-thinking short-term forecasting would suggest re-thinking the current practice of fashion and its underlying economic system (Williams, 2019). Long-term forecasting with the aim to prepare clients for future scenarios (Brannon, 2005; Vergragt & Quist, 2011) like climate change and resource scarcity, however, would encourage clients to adopt environmental sustainability. Since environmental sustainability is defined differently according to context, forecasting sustainably does not necessarily depend on *what* is forecasted. It becomes a matter of *how* consistently it is forecasted. Sustainable forecasting as opposed to forecasting sustainability is a means of communicating unambiguously a preferable scenario of sustainability. As a long-term view is needed in order to ensure that sustainability is understood as a prerequisite by clients, showing sustainability as a strong theme in every season - as opposed to interrupted by other themes - combines seasonal forecasting with the nature of long-term forecasting. As a sustainability-driven forecaster, one has the responsibility to avoid abstract narratives and emphasize what matters truly (Fletcher and Tham, 2015).

The option of customizing a forecast to a client is a possibility that was not reviewed in the previous research, hence an unexpected finding. A forecast that is aimed towards the needs of the brand could result in products not appealing to short-term design trends but appealing to the unique needs of a customer and thus used for longer. Customized forecasts, however, equals to a more directive approach to forecasting, which is thereby opposite to how trend forecasters currently wish to be represented as, minding the controversial debate of forecasters as informers versus creators of trends (Lantz, 2018). Pursuing this directive approach of customized forecasting thus requires even more responsibility with regards to how trend forecasters communicate their forecasts. More specifically, if customized forecasting is to be compatible with sustainability, it means that forecasters must ensure that they avoid appointing trends calling for unsustainable processes, as aligned with Payne (2011).

5.2 Research contributions and managerial implications

This study has strived to contribute to the under-researched field of trend forecasting (Blaszczyk & Wubs, 2018) by reducing the research gap concerning the role of trend forecasting in relation to sustainability. The academic research that explicitly investigates trend forecasters' roles in sustainability is five or more years old, and use narrow samples of respondents (Tham, 2008; Muvira, 2015). By including a larger sample of trend forecasters and conducting the research during a time when the discussion of sustainability appears more pressing than ever before, this research contributes with more extensive empiricism and current discoveries. On that note, our research demonstrates compatibilities between trend forecasting and sustainability, which Tham (2008) suggested for further research. These findings oppose the most recent research stating that sustainability is not a part of trend

forecasters' mission (Muvira, 2015). Nevertheless, findings also validate the initial supposition of this study, namely the trend forecasting paradox, as concluded above. Furthermore, our research recognizes a need to divide the practice of forecasting sustainability and sustainable forecasting, since they do not necessarily correlate. To the best of our knowledge, this has not been recognized by previous research.

Regarding managerial implications, our research findings could count as suggestions for trend forecasters seeking answers on how to further incorporate environmental sustainability as part of their mission. This study implies that the trend forecasting industry could be a resource beyond what it currently maintains by avoiding practices encompassed by the trend forecasting paradox and by putting further emphasis on sustainable forecasting rather than forecasting sustainability. Although short-term forecasting has shown to be more closely connected to fashion's inherent obsolescence, it cannot be suggested that trend forecasters abandon their seasonal forecasts. Instead, communicating sustainability as a strong theme in every season combines seasonal forecasting with the essence of long-term forecasting. Furthermore, customized forecasting is proposed a compatible method for both short and long-term approaches. A forecast that is tailored based on the clients' needs could prevent products with temporary appeal by recognizing trends uniquely relevant for the client's segment. Customized long-term forecasting would embrace methods like scenario planning, beneficially through technologies like AR, which could better prepare clients for plausible futures as well as making the future more conceivable. However, implementing customized forecasting is accompanied with a more directive approach suggesting that clients would likely take the forecasts more prescriptively. Consequently, if customized forecasting is to be compatible with environmental sustainability, forecasters must avoid appointing trends calling for unsustainable processes.

5.3 Limitations

As this study is qualitative, the way we have approached our respondents - how we ask questions and how we interpret them - is influenced by our own understanding of the world (McGinn, 2012). Hence, it cannot be excluded that different researchers may have come to different conclusions. Also, our findings are based on the perceptions of social actors which, as always when pursuing a subjectivist research study, cannot be granted as the "objective truth" (Moisander & Valtonen, 2006). This study can, thus, neither confirm nor deny the possibility of our respondents embellishing their answers to portray themselves, their work, or their company's work, in a good light. Furthermore, although we addressed the perspectives of large online trend agencies through a content analysis of WGSN forecasts, we stand by this as one of our limitations since an interview would have provided us with richer data from this trend forecasting branch. Lastly, selecting respondents who provide trend research for fast fashion companies could have given insights on how trend forecasts are translated in the industry, thus demonstrating how influential trend forecasting is.

5.4 Suggestions for future research

As the theme *Democratization of fashion* was thought to give rise to expression of personality as opposed to following the newest trends, our respondents pointed to trends being relevant

for longer than promoted by forecasters. Such a development could be followed up by future research, by investigating how decreased demand for newness could influence short-term forecasting. Trends relevant over several season could have implications for how greatly fashion collections change each season, hence making less resources necessary which again correlates with environmental sustainability.

Future research could also explore the role that trend forecasting could play to further social sustainability, since this study is demarcated to environmental sustainability. In that case, sampling respondents from outside the fashion industry could be a beneficial method just as it brought fruitful insights to this study. Our non-fashion forecaster contributed with valuable and unbiased perceptions on sustainability and forecasting practices and showed that the fashion industry can learn from other industries.

Also, this study showed the trend forecasting paradox including examples from WGSN macro forecasts. It may be of interest to further research their case and focus on a broader spectrum of forecasts and investigate how these are translated by their clients. Lastly, since this study was undertaken in a time where sustainability was a topic of interest in the fashion industry this may explain its prominence in the results of this study. However, whether sustainability will be seen as a prerequisite or fade like a fashion trend in the future, is still to be seen. Including the role of trend forecasters as an important part of the fashion system means making them part of the discourse when discussing sustainability and fashion in the future.

Final words

When starting this study, we felt strongly about the sustainability shift needed in the industry but also that the novelty inherent to trend forecasting was irreconcilable with the imperatives of sustainability. We are thankful for the perspectives of our trend forecaster respondents, as they opened our eyes to an industry that, in fact, takes its influential role seriously and envisions new possibilities for sustainability in the fashion system. It follows from our sustainability framework, that a change towards sustainability means rethinking the prevalent system of growth and, as such, rethinking current fashion practice. Seasonal forecasting anchored in the fashion industry's demand for newness, appeared unable to change as long as there was no need for change.

As we end this study, situated in the lockdown-free Sweden, we are not touched as much by the disaster that the Covid-19 virus has brought over other parts of the world. Yet, through the window of fashion magazines, we can see a change brewing in the fashion industry. With the ongoing pandemic laying bare the fragilities of the fashion system, excessive inventories and the rampant number of fashion seasons have shown to be a burden as consumption rates flatten and economic growth falters. Where fashion companies abolish traditional design seasons, we feel a new energy accelerating the slow advances that have been made in the last decades. Now, a systemic change does not appear as distant as before this study started. The pandemic has put our world on hold, situating people in a vacuum with excess of time, which we otherwise scarcely possess. As we exit the university and enter an empty job market, it does not feel as hopeless as one may think. If this crisis summons a positive change in the fashion industry, we do not mind some free time…

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Appendix 1: Interview guide for fashion trend forecasters

What is your job title and area of responsibility?

Can you tell us about your work experience within fashion trend forecasting?

Could you tell us about your forecasting method?
What does your output look like (e.g. trend reports, consultancy, seminars, etc)?

What kind of clients have you worked with (retailers, designers, manufacturers, etc)?
How do you think your clients have used your forecasts?

What comes to your mind when thinking about sustainability in the fashion industry?
What is your vision of a sustainable fashion industry?
How do you think fashion forecasting could contribute to that vision?
Do you see any challenges working with trend forecasting and sustainability at the same time?

What do you think is needed - be it in the forecasting profession alone, or in the fashion industry holistically - in order to reach a transformation towards sustainable practices?

Would you like to work more with environmental matters than you do right now?
Are you satisfied with your own involvement in the sustainability realm?

Do you think technologies like AI will influence the profession of forecasting?
Would you be open to incorporate such technologies in your work process?

What's your vision for the future of forecasting?

Appendix 2: Interview guide for non-fashion forecaster

What is your area of responsibility and job title?

How would you describe your forecasting method?
What does your output look like? - e.g. consultancy work, trend reports, seminars

What clients use your services?
How do you think your clients use your services?

What comes to your mind when thinking about sustainability?
How much is your/the agency's work concerned with sustainability?
What do you think are the main challenges when implementing sustainable practices in the industries you work with?

How aware are you with fashion and its connection with sustainability?
Do you see any parallels between the fashion industry and your clients? Is there something fashion could learn from other industries?

Seeing that the fashion industry is one of the most polluting industries in the world, sustainability is emphasized to a large extent – not only through materials but also through practices. Do you think the practice of forecasting can have a contributing role on sustainability?

Imagine having a fashion client, what kind of advice would you give them to be more sustainable?

Do you think technologies like AI will influence the profession of forecasting?
Would you be open to incorporate such technologies in your work process?

One reason why the fashion industry is slowly progressing in the sustainability area is believed to depend on that the actors of the fashion system operate separately. Do you think there is a way to achieve better collaboration in the fashion industry? Do you have any reference from another industry?

Other experiences you have made in connection with forecasting and sustainability?

How do you see the future of forecasting?

Appendix 3: Content analysis WGSN forecasts

Season	Trends (Forecast name and category name)	Content and meaning	Meaning interpretation
SS/16	Past Modern - New Opulence	Opulence is synonymous with ornamental/unnecessary embellishment	Contradicts minimalism and sustainability
(Macro trends)	Eco-Active - Raw Power - Brute Nature - Survival Solutions (evolution from A/W SOCIAL SUPERHEROES forecast: " Designers are using creativity as a force for good, addressing issues such as privacy, sustainability and product lifecycle. An environmentally ethical approach reaffirms the urgent need to create responsible solutions for consumer goods. ")	Raw power: sport events halts eco-disaster. Brute nature: "ecocide" to remind of rawness by using finishes that resembles oil, lava, rubber Survival Solutions: making use of all resources to minimize destructive impacts, Ooho! is a **sustainable** alternative to plastic water bottles with an edible form of algae for an outer skin. It's inspired by the process of 'spherification', Rio de Janeiro has been criticised for its poor ecological record, so with the arrival of the Olympics in 2016, the city is working on a **sustainable** management plan to help offset the impact of its infrastructure.	Raw power is believed to have opposite effects Coatings resembling oil/rubber/lava usually requires harmful chemicals -refering to Event to argue for sustainable management, it touches the subject but does not go in depth concerning how to apply it to design 2
	Deep Summer - Toxic Light & Deep Summer Colour Forecast	Toxic light: synthetic acid bright colours as inspiration from bioluminescent deep sea creatures, and deliciously unnatural look. These are mimicked in neon-like "toxic palette". which is interpreted as communicating a	Palette is not in line with sustainability as the dyeing processes requires harmful chemicals 0
A/W16/17	Remaster - Fierce Opulence	Opulence is synonymous with ornamental/unnecessary embellishment.	Contradicts minimalism and sustainability - this forecasts looks very different from former and following forecasts 0
(Mega-trends)	Elemental - Old Seafarer - Fisherman's Oilskins - Colour Erosions - Mineral Traces -Smoky Luminescence	Old seafarer: ferocity of nature's forces - protect yourself from it - wools, natural fibre, providing shield and shelter from wind and rain. Fisherman's oilskins:protecting against nature's forces - leather and oil coatings Colour erosions: influencing surface treatments, washes, patterns, prints and tie-dyes. Mineral Traces: Softly weathered and washed, the remnants and residues should be left to linger. Smoky Luminescence: Luminescent finishes	- Natural fibres - Leather/ Toxic finishes (resembling oiliness) -Creating new garments then tearing them down again to achieve the aesthetic -Luminescent = toxic finishes 0
The Vision S/S17	Pause - Treasured Digital Wave Edgelands	Ostentation, opulence the return of ornaments and totems, where the value is not in function, but in significance -"Truth really is the only **sustainable** advantage" - Geoff Beattie, global practice leader at Cohn & Wolfe -The city and suburbs will increasingly	"Pause" appears opposing to opulence

	Encounter Culture	be both connected and **sustainable**, with apps that allow people to communicate with their environments in real time -Discovery will be key for 2017: with the global travel boom, both new and more experienced travellers will be looking for unique encounters, to uncover and discover the best-kept secrets of the world. New global encounters will be shared on visual platforms and apps, but will also be translated into subtle style combinations. **Sustainabilit**y will shine through beautiful treatments of waste, recycled and raw materials that elevate the ecological to new heights. -Green will be the new black as **sustainable** design raises the standard, making raw materials and waste by-products both beautiful and creative HYBRID DESIGN: Design will become increasingly resourceful, **sustainable** solutions. A leader in this field is Marjan van Aubel, who turns daylight into energy using modern stained-glass-style windows. She creates an electronic current through colour, capturing the energy from the sun to transform a windowsill into a charger for devices. It is an elegant example of how we might harness energy in our homes in the future. **Sustainability** is also at the forefront of Nienke Hoogvliet's agenda, who works with sea algae, plastic waste and fish scales to create highly-textured, environmentally friendly textiles. Johanna Glomb and Rasa are also kickstarting this new eco-focused movement, as they tap into the undiscovered potential of algae. The project is called Algaemy, and they have used algae-based ink to create bright, eco-friendly textile dyes that are so clean and toxin-free you could drink them. With **sustainability** becoming more and more of a prerequisite, these projects demonstrate that designers are adopting a highly innovative green mentality that goes beyond mere recycling	- "Green is the new black" shows the shallow approach to complex ideas like sustainability -Encounter culture: refer to Designers and artists using sustainable solutions, giving clients concrete ideas to make use of, SS17 is the first forecast in this analysis that features sustainability in-depth sustainability is "prerequisite", clients have to take it seriously 7

The Vision A/W 17/18:	Design Matters - Just Do Good - Beautiful Waste - Soft Industrial - New Heirlooms	How will brands respond to an era where we expect products to not just be good, but also DO good? Just do good: **Sustainability**, eco-friendly, green – these buzzwords have floated around the fashion and design industries for years. Though some retailers have dipped their toes in green initiatives (eco-friendly capsule collections, in-store recycling drives), companies need to dive deeper to meet consumer demands. Beautiful waste: Going forward, increased importance will be placed on sophisticated **sustainability**: solutions that turn waste into beautiful materials and objects. items that are not necessarily mass-produced but can be made to order, New heirlooms: Timeless classics, Life cycles are reworked, as we look to invest in items and products that last in terms of make, quality and style, **Sustainabilit**y takes on a new elegance.	Advancing sustainability communication. Slowness, high quality products that are made to last, timelessness. Also use buzzwords - overuse of buzzwords makes them lose meaning, then there's the risk of overlooking them because one thinks "this has been around for so long now, it is time to move on to something new", without really having integrated the concepts behind these buzzwords (Tham, 2012). WGSN acknowledges here that these buzzwords didn't necessarily been translated by retailers, pushes more for it "dive deeper" but with the argument that "consumers demand it" - consumers look for products to use for longer 3
The Vision S/S18:	Kinship (evolution from Design Matters according to WGSN)	MODERN MARINER: routes along the Silk Road inspires a fusion of Eastern and Western styling TREASURED INTRICACY: A subtle approach to decor and adornment Traditionally detailed carvings are re-rendered as sophisticated 3D prints, moving towards a high level of technical craftsmanship DISRUPTED CRAFT:with bold decoration, artisanal deconstructions, and unexpectedly delicate details.(180 from former forecasted minimalism trend) :	No resemblance between Kinship and Design Matters - Sustainability is just a trend which is not forecasted if not a trend.Also, the contents are not at all similar since "Design Matters" refers to specific design 0
Women's Forecast S/S 18:	Slow Futures - Mercury Rising	Basics take centre stage to become the majority of the wardrobe The use of reflective finishes has a futuristic industrial feel, and feels faintly space-age. Clean and structured fabrics appear to have a liquid quality.	Minimalism, yet use of finishes 0
The Vision A/W 18/19:	Worldhood (evolution from Kinship)	Cultural sustainability	More related to Kinship 0
	HumaNature	in a world increasingly driven by data, 2019 will see a push back to trusting our intuition, as new research re-validates the power of instinct. With the global economy set for a slow down, the instinct for many will be to think long-term, to develop **sustainable** resources, and to look to nature and other species for solutions. In learning to go with our guts, we will see a new symbiosis between humans and nature. With a slowing global economy, smart brands and switched-on consumers will invest in long-term systems to **sustain** the economy and the planet: Couple this with reports that growth in FMCG is slowing, and it's clear that a shift in mentality will soon be needed. In the	Sustainability = Slow Notion of sustainability as imperfect is reproduced. Perfect Imperfection → Sherri "beauty in imperfect colours" Reconnect with nature by using natural hides - unethical?

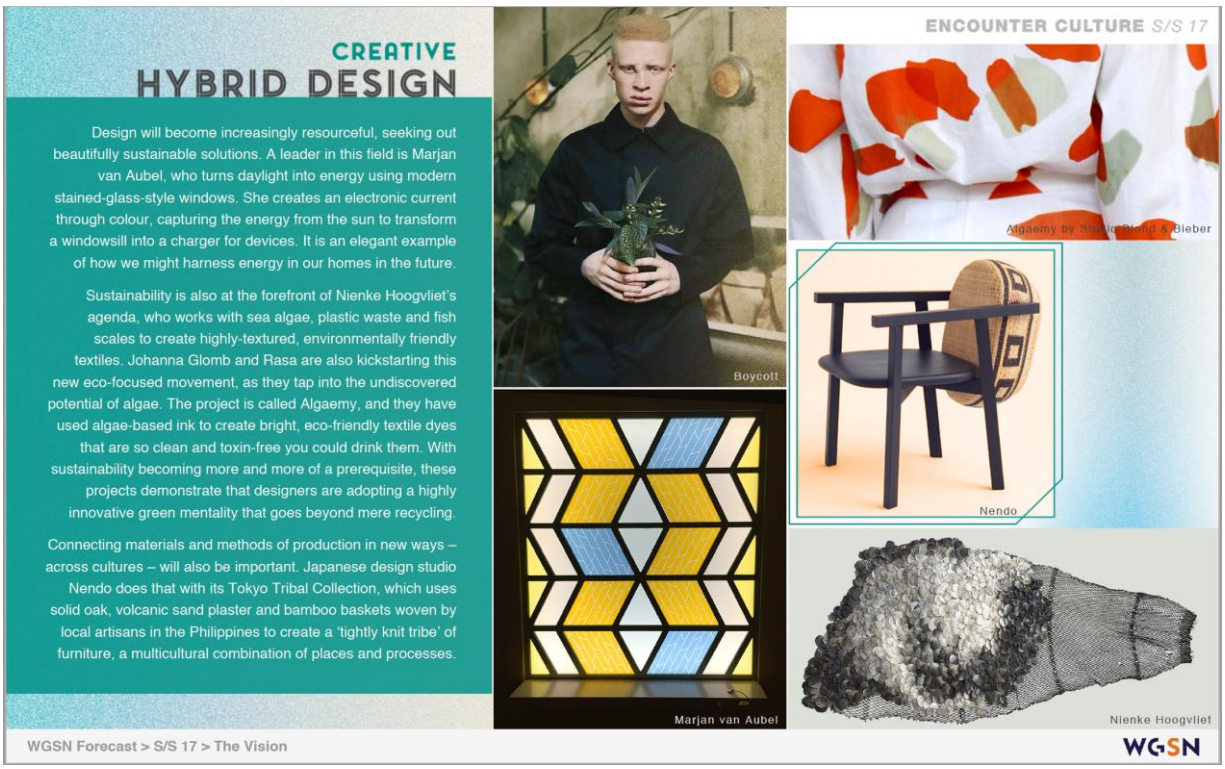
		future, designs that **sustai**n the planet, and the economy, will differentiate global brands PERFECT IMPERFECTION: PRODUCTS AND SPACES WILL MOVE BEYOND FUNCTION, TRANSMITTING TIME, TEXTURE AND EMOTION: In an imperfect world, we will embrace the beauty of imperfect surroundings: surfaces that have aged, products that speak of handicraft, and buildings that tend to the soul. RE-WILDING: A desire to reconnect with nature will lead us back to wilder instincts. We will seek out products and settings that feel primordial and tactile, and surround ourselves with materials that have a sense of mysticism. Growing consciousness around **sustainability** will see new raw materials created from natural waste, and for textiles, rustic weaves and **natural hides** will provide a sense of savage sensuality UNCHARTED CRAFT: Native products, artisanal techniques, and vibrant traditional patterns will be made modern and relevant to a global market, but in the spirit of preservation and collaboration, rather than cultural appropriation. Embellishments	
The Vision S/S19:	Creative Manifesto Action/Reaction Common Ground In Touch	Equality, mental health, riots, extremism, questioning the system Creative Manifesto: Designers should make services and critical designs instead of objects Common ground: UK villages are also being revived. In towns such as Malton, Yorkshire, disused storefronts are being turned into local cheese shops and cafes, fuelling local business and attracting urbanites. And as the lure of rural life grows, UK developers are planning 'modern villages' that mix **sustainable** construction and super-fast wi-fi with a sense of authenticity and charm – think landscaped duck ponds and thatched roofs	No sustainability communication in either of the macro trends Design meaningfulness - somehow related to sustainability
The Vision A/W 19/20:	Purpose Full	**Sustainability** is imperative, not impossible. This should be the mantra of every business, looking forward. **Sustainable** practices can be challenging to implement and promote in an exciting way, so think creatively. How can you work with an unlikely partner to kickstart your initiatives? Transparency is a keyword that feels familiar, but how many businesses communicate true transparency to their customers? As the concept of economic nutrition emerges, how will you meet the growing demand for transparency from your customers, to stay both relevant and profitable? For the fashion industry, it's time to rethink purpose. People are investing closet-space and money on multi-purpose apparel. It's the dawn of life-wear. Smart brands will seek unlikely partners for **sustainable** collaborations. Target and the Center for Advancement of	Longevity -challenging to implement, however not necessarily costly, as Ulf says - transparency much talked about but still not integrated properly "make their **sustainability** credentials clear." - reminiscent to greenwashing, just because

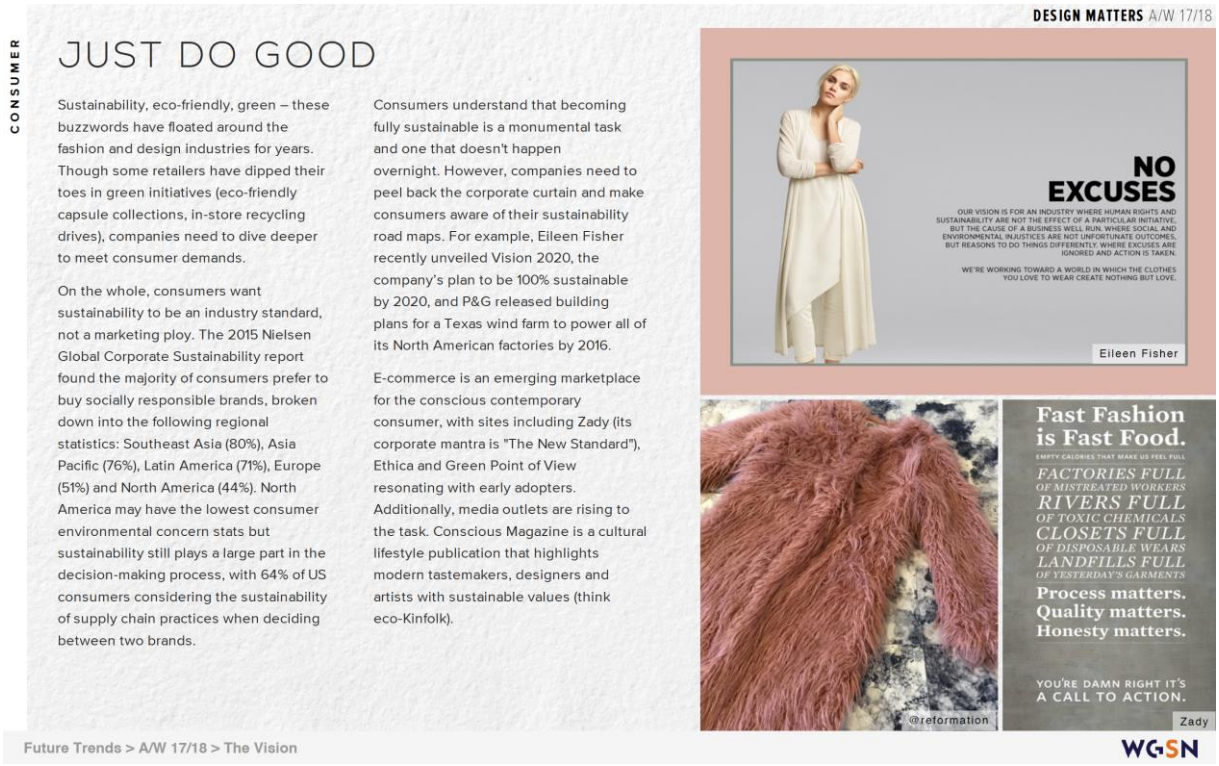
		Science in Space have teamed with the International Space Station to accelerate **sustainable** cotton research beyond our planet. Being good for the environment and the economy are not separate concepts. A 2017 Unilever report found that an estimated €966bn in untapped market potential exists for brands that make their **sustainability** credentials clear. This is especially true for emerging nations. 53% of UK shoppers and 78% of US shoppers say they feel better when buying sustainably produced products, but that number rises to 88% in India and 85% in both Brazil and Turkey according to the Unilever report. ReFLEXions on production — **Sustainability** will reach the next level as brands begin to integrate integrity into every area of business. We will move from living bigger to living better.	you communicate does not mean you are truly sustainable -sustainability is a big market 6
	ReFLEXions	Warming Up to Global Warming: In 2019-20, **sustainability** will infiltrate every aspect of our personal and professional lives as we go from buying more to buying better. Consumers will begin to purchase products that last and nourish the planet, rather than those that deplete it. The 'economic nutrition' of a product will tell the story of how it was made and what impact it has on a local and global scale. Transparency is just the tip of the iceberg. Businesses need to be clear about how they are helping – to take action, and show their **sustainable** practices to the world.	
	Light Magic	ReFLEXions on nature — In an era driven by rationality, we will see growing interest in the mystical and the emotional. Our views of nature, including human nature, will radically shift.	Shallow inspiration from nature, instead of sustainability
The Vision S/S20:	Fix the Future	In 2020, we will embrace the importance of new voices, inter-generational perspectives, and a world where our emotional needs cannot be fulfilled by a smartphone. We will move away from tired marketing, traditional corporate structures, and **mass consumption**. We will fix what's broken, instead of breaking what's working. Post-Consumerism: ing more in new systems that shift product life cycles from disposable to renewable. At the same time, the phrase 'material wealth' will take on a more literal meaning as regenerative materials such as self-healing concrete and new bioplastics hit the market. In emerging nations, cultural appreciation will outshine Western importation, as designers and artists revalue their heritage and local creative consumption becomes the new cool. We will still covet what we buy in 2020, but we will focus more on the true cost of ownership	

	Code Create	With the emergence of new eco cities, innovations around **sustainability** will create jobs and positive communities, such as the hydrogen society being created for the 2020 Tokyo Olympics. **Desirability and sustainability are not mutually exclusive concepts**. As conscious consumerism grows, there will be a **shift in what makes a product aspirational**. How can you take advantage of precision personalisation to offer items that people will want to keep for good? Eco Social Systems: As we invest more in circular systems to reduce our carbon footprint, we will also need to ensure our social footprints are not lost. sustainable Cities Precision Product: "S**ustainability** of objects is directly related to how loved and desired they are," says Gadi Amit, founder of NewDealDesign. "Our goal is to design things people want to keep." Citizen Wolf democratises tailoring by applying it to the most mass of clothing items – the T-shirt. Its zero-waste tees are made-to-order, and customised via its website by length, style, cut, hem and more. Precision products will answer the call for **sustainably** bespoke design – because one size has never fitted all Regenerative Design: From regenerated voices to self-healing materials, life cycles will shift from disposable to renewable. Reuse culture is already well underway, and reviving will drive innovation in 2020. Circular materials and conceptual regenerations will gain mass acceptance, as consumers and designers embrace the potential of revitalising, rather than reinventing. **Sustainability** often seems an insurmountable task in the current political climate Circular systems will be both materially and socially **sustainable**	Desirability and sustainability are not opposites - in contrast to Sherri's perception
Big Ideas S/S20:	Sustainability Matters vs. Embrace Extremism	Sustainability Matters: The conversation around **sustainability is growing louder**, and will be a key element of brand success in 2020 and beyond. Currently, one fifth of the world's water pollution is a direct result of industrial textile **dyeing processes, so colour is a major part of the conversation around environmental ethics**, and international legislation is beginning to recognise this. Embrace Extremism:Expect a shift towards maximalism in 2020, referencing 1980s excess, and moving away from the pared-down palettes popularised by trends such as hygge. **At the start of a new decade, playful colour, pattern and texture will reign supreme. More is more here.**	More is more. Excess. Maximalism as a reaction to minimalism. They are all words of contradiction to sustainability.

Women's & Young Women's Forecast S/S 20:	Code create	Hyperreal**: Iridescent surfaces** work well with a digital lens. Tap into social-media-savvy mindsets with illusory finishes.	Iridescent surfaces: such finishes are usually toxic and not exactly sustainable
A/W 20/21 Coronavirus: Design Priorities (created **03.20.20)**	wellness, comfort, protection and limitarianism	**Bank on Heritage:** Outdoor Heritage x Performance: active will see an intensified focus on pieces built to last, fusing heritage elements with performance and outdoors influences in fresh ways. The result will be designs that borrow from the past to create modern **(and sustainable)** looks**.** **Co-Crafting: Repair, Reuse:** items that embrace individuality and encourage personalisation will appeal to a growing focus on **sustainability,** along with the movement towards slow craft**.** **The End of More:** Enforced isolation will amplify 2021's minimalist-led macro driver with more considered consumption, focusing future product requirements around utility, versatility and longevity. **Big Ideas 2021:** scaling-back on SKUs to trade on quality over quantity has its risks, but done right, supply chains can be streamlined, speed to market can be improved, and a more confident and cohesive brand message can be communicated. **Buyers' Briefing Womenswear: sustainable** solutions go hand-in-hand with the focus on minimalism. Shout about new material innovation and use hero pieces that promote longevity for a capsule wardrobe, supporting work, rest and play. **Multipurpose Product:** As consumers' worlds shrink and economic concerns grow, the notion of 'good value' will be redefined. Useful, durable products which serve multiple purposes will be the new drivers of value. In the short term, this is particularly relevant to the swim and vacation category as travel plans are cancelled.	
Big Ideas 2021: Active (created 01.17.19)		**Key topics for the 2021 active market will focus on digital design, extending product life cycles, and strategies for sustainability, as the development of new technologies gathers pace and innovations propel the sector towards an exciting new era.** **The End of More:**	

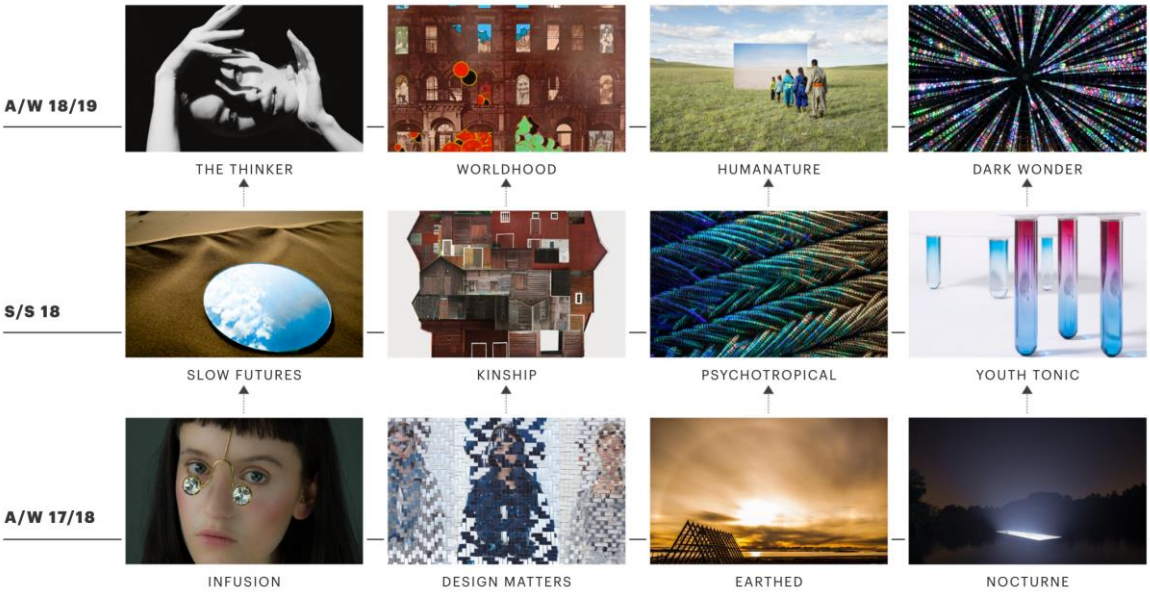
Appendix 4: Picture examples from WGSN



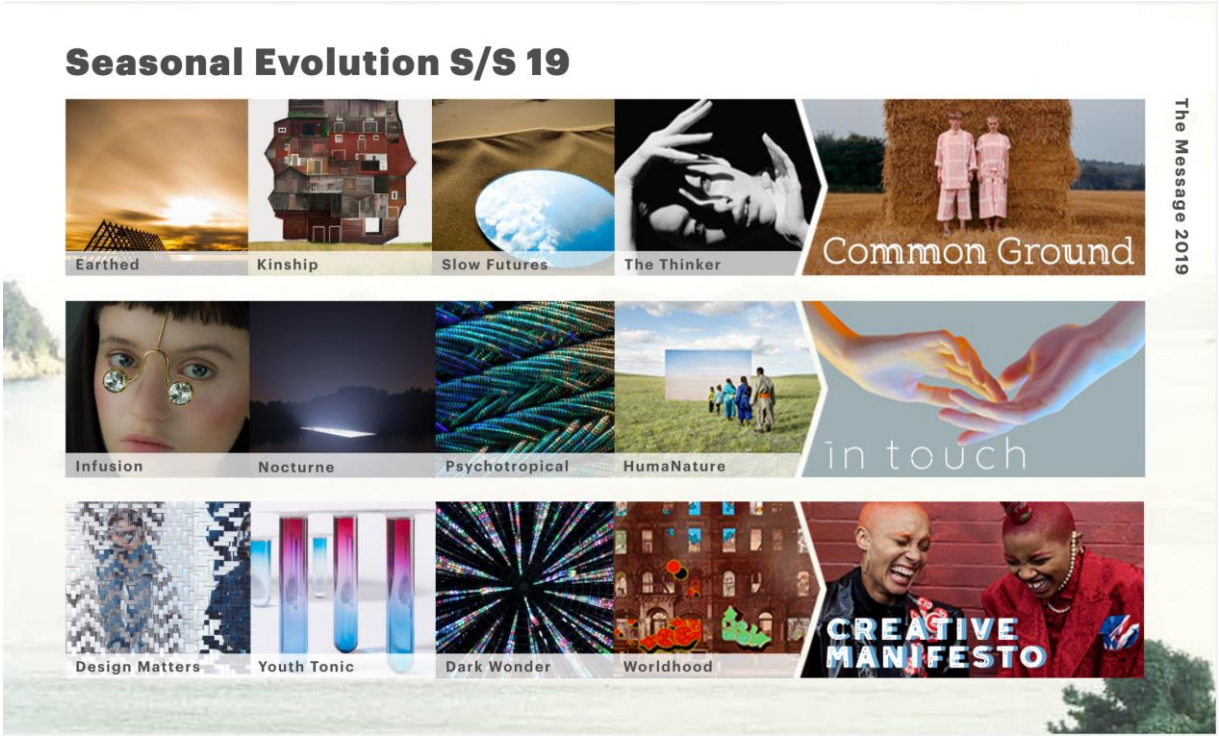


SEASONAL EVOLUTION

THE VISION TRENDS AS THEY EVOLVE INTO THE FUTURE



Seasonal Evolution S/S 19



SLOW & SUSTAINED

WITH A SLOWING GLOBAL ECONOMY, BRANDS AND CONSUMERS WILL INVEST IN SELF-SUSTAINING SYSTEMS

"It is a little-noticed fact that trade is no longer rising," says Binyamin Appelbaum in a recent New York Times op-ed. The value of US imports and exports fell by more than $200bn in 2015, he noted, and trade negotiations are floundering.

Couple this with reports that growth in FMCG is slowing, and it's clear that a shift in mentality will soon be needed. **In the future, designs that sustain the planet, and the economy, will differentiate global brands.**

Elon Musk's Tesla Gigafactory, currently being constructed in Nevada, is at the forefront of the new corporate ambition. Powered by wind and solar energy, the $4.5bn factory will be entirely self-sustaining, with an economic impact of $100bn over 20 years.

The Shoe Without a Footprint paves the way to a future where products sustain. **This ordinary-looking white sneaker is made from 75% gaseous waste** from power plants, which is converted into a polymer. It was made by NRG & 10xBeta to increase awareness of the potential of CO_2 emissions as a viable resource.

Global attitudes to food are also being reshaped by this growing 'sustain' mentality. Patagonia's food programme, Patagonia Provisions, has no smaller an ambition than to "repair the [food] chain". Championing the work of regenerative growers and farmers, its products include Long Root Ale – a new beer made with Kernza (a wild variety of wheatgrass whose deep roots capture more carbon into the soil).

In Brazil, attention is turning to unconventional but edible plants (milkweed, samphire, amaranth and many others), which offer an alternative source of food and flavour. **Root-to-stem, or compost cooking, is also on the rise** as consumers transform leaves, stalks and seeds into a new resource.

Consumer

Economic Nutrition

Sustainability is imperative, and it's not impossible. It's time to nurture our purchases with the same care as our bodies.

Being good for the environment and the economy are not separate concepts. A 2017 Unilever report found that **an estimated €966bn in untapped market potential exists for brands that make their sustainability credentials clear.**

This is especially true for emerging nations. 53% of UK shoppers and 78% of US shoppers say they feel better when buying sustainably produced products, but that number rises to 88% in India and 85% in both Brazil and Turkey according to the Unilever report.

How do companies create purpose-led purchasing? An initiative by Fogo Island Shop points to the future. **"Food nutrition labelling created a revolution in the food industry. We want to spark the same energy for change with the launch of an economic nutrition label,"** says a statement from the business. This label breaks down the economic costs (labour, materials, packaging) of the product and the amount reinvested in the local economy.

For the fashion industry, it's time to rethink purpose. **People are investing closet-space and money on multi-purpose apparel. It's the dawn of life-wear.**

The 10ELEVEN9 smart shirt concept "is a daily companion for the digital native". Nine hidden pockets store your daily essentials and two RFID-blocking pockets protect from scammers. There's a sensor that adjusts your posture and tracks your mental health, and an embedded camera.

Uniqlo's LifeWear collection focuses on the values of simplicity, quality and longevity, and is accompanied by LifeWear Stories: a series of everyday people telling their personal connection to a Uniqlo garment. **Stories, not stuff, will be a key focus of economic nutrition: we know where our food comes from, so why not our things?**

Smart brands will seek unlikely partners for sustainable collaborations. Target and the Center for Advancement of Science in Space have teamed with the International Space Station to accelerate sustainable cotton research beyond our planet.

Post-Consumerism

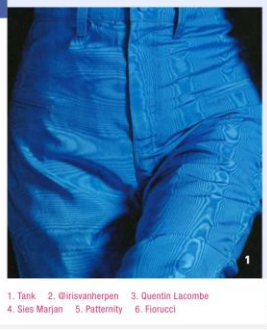
In mature markets, we will be buying less and investing more in new systems that shift product life cycles from disposable to renewable. At the same time, the phrase 'material wealth' will take on a more literal meaning as regenerative materials such as self-healing concrete and new bio-plastics hit the market.

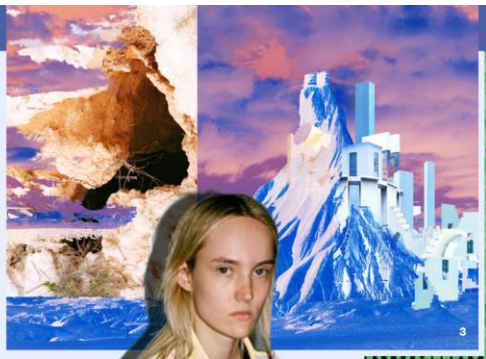
In emerging nations, cultural appreciation will outshine Western importation, as designers and artists revalue their heritage and local creative consumption becomes the new cool.

We will still covet what we buy in 2020, but we will focus more on the true cost of ownership.

Hyperreal

- Psychologically-charged landscapes that resemble places only glimpsed in dreams inspire a range of uplifted core items.
- Moiré-inspired undulating patterns and jacquards mimic the interplay between the digital and the analogue. Jersey and knit items benefit from this future-proofed aesthetic.
- Iridescent surfaces work well with a digital lens. Tap into social-media-savvy mindsets with illusory finishes.
- **Drop:** Summer Transitional





1. Tank 2. @irisvanherpen 3. Quentin Lacombe
4. Sies Marjan 5. Patternity 6. Fiorucci

THE SWEDISH SCHOOL
OF TEXTILES
UNIVERSITY OF BORÅS

Visiting address: Allégatan 1 · Postal address: 501 90 Borås · Phone: 033-435 40 00 · E-mail: registrator@hb.se · Webb: www.hb.se