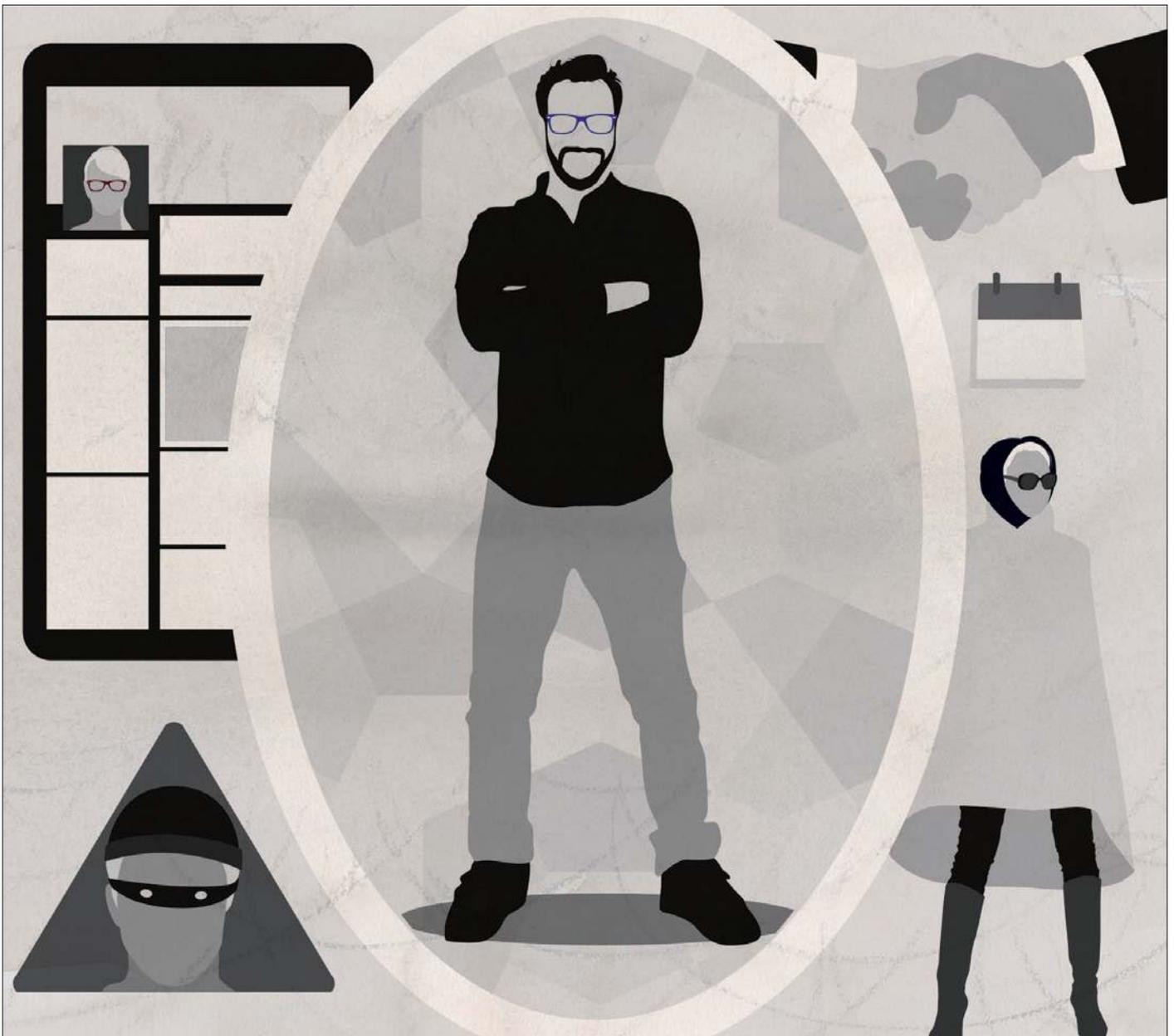


THE DESIGNER of tomorrow



The fashion industry is predicted to change as much in the next ten years as it has over the last 100. Consolidation, computerization and globalization are the major disruptions of today, and will continue to be as they morph and change. Fashion designers are at the forefront of these disruptions.

In partnership with the Council of Fashion Designers of America (CFDA), a not-for-profit trade association whose membership consists of more than 450 of America's foremost womenswear, menswear, jewelry and accessory designers, Lectra surveyed the leading professionals working within today's ever-changing, fast-paced international fashion and apparel industry.

This investigation explores why and how the role of the fashion designer is changing. It presents the most important challenges, disruptions and changes that affect fashion designers today... and will continue to influence the profession for years to come. We piece together a vision of how next-generation fashion designers continue to create in today's modern fashion environment.

“As a fashion designer, I was always aware that I was not an artist, because I was creating something that was made to be sold, marketed, used, and ultimately discarded.”

Tom Ford

Arguably, designers are artists. Today, a new dichotomy between artist and technician lies at the heart of issues surrounding the new role of the designer. The fashion designer now occupies a space between creative, technician and merchandiser, a framework and skill-set imposed by an increasingly competitive and demanding marketplace.

The biggest pressure on designers, according to the Lectra/CFDA survey results, relates to speed to market: getting collections out quicker and quicker to continually renew the in-store offer. Consumers, at least those of fast-fashion and contemporary brands, have become indoctrinated with a ‘you snooze, you lose’ mentality. This retail strategy of changing merchandise as

often as every few weeks to invoke immediate sales is a way of staying competitive and combating online sales. Consumer expectations and shopping habits are changing as a result —a circle which means more is being consumed, more often.

In addition to shorter time to market and more collections, designers now have to deal with more competition. Brands need to differentiate themselves, while attempting to appeal to a consumer who is informed, empowered, less brand-loyal, mixing high and low pieces and not squeamish about shopping for the best price online.

Yet the new designer is not completely unarmed to face this new context: digital tools allow them to work fast, both by storing data to be reused as needed and by completely eliminating time consuming tasks such as manual grading, even reducing the need for physical samples to one, with the use of 3D virtual prototyping software solutions.

Collaboration is becoming seamless, as digital styles can be manipulated, saved, changed, tweaked and re-edited by several collaborators across different countries and time zones. This generates a new type of collective creativity. A good command of this new designer toolbox is, according to our survey results, mandatory:

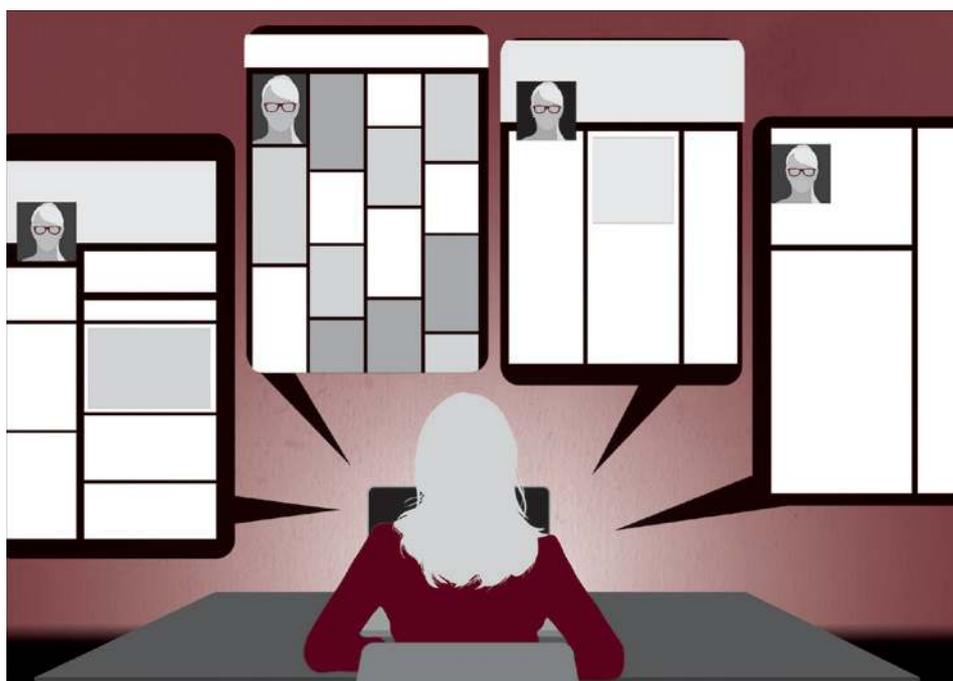
“Technical innovation means production techniques and the tools used for design and development have become more advanced. Designers need to have a grasp of the latest advances.”

CFDA survey respondent

Collaboration extends beyond the enterprise. Designers and development teams need to share information in real time with external partners and suppliers. Even consumers, through social media, now have a platform to communicate with designers and express their top brand picks and preferences. The fashion ecosystem is reconfiguring.

The very business models dictating how the designer operates have been transformed. A hybrid model, like the Chinese manufacturers that are now designing and selling their own brands, rather than only producing for others, is becoming a viable and appealing option. Designers no longer work in a design-dedicated silo, but alongside buyers, merchandisers, marketers and even manufacturers.

Despite this newfound creative freedom as enabled through digital tools, why does so much ‘fashion’ look the same? Why are we more reliant than ever on luxury houses to lead and inspire? What is expected of a designer within this demand-driven economy?



The consumer is an imposing figure for the new designer. This consumer is taking an active role with digital media; a two-way dialogue is now part of the consumer-brand, and hence of the consumer-designer relationship. For designers to remain in the game, it is essential for them to find the right balance between keeping up this conversation while remaining true to their brand aesthetic. Insights from our survey show that designers see the consumer as a dominant figure. As one respondent bluntly puts it: *“Gone are the days when one could design in a vacuum and shove products down the consumers’ throats. He/She who is closest to the end consumer wins the race...”*

CFDA survey respondent

The same social media platforms which empower the consumer voice must be used by the designer to communicate with the consumer, and even feed their design process. The sophisticated, informed consumer has gone from a passive role making choices based on a limited selection of ready-made designs, to having an influence on the brand, the designer and the final product. Consumers exert their power through “liking” something

on Facebook weighing in on what a brand will make more or less of by voicing opinions on social media forums and by encouraging or dissuading other consumers to buy. At the extreme end, this new two-way consumer-designer relationship creates a closed circle where the consumer feeds the brand, for example by creating virtual communities and groups which can be used to crowd source content for marketing, design and branding. The result: a totally new creative landscape for designers, one that not only needs to be navigated, but can also provide inspiration and take them to a new level.



TOOLS AND SKILLS REQUIRED

Designers have more knowledge about technical issues and production than they did ten years ago, according to our survey findings. Brands combat the challenge of reduced time to market by demanding that designers be more polyvalent. Designers need to demonstrate versatility and they also need to factor in costs and pricing. It

often falls to the designer to deal with the technical aspects: as teams and processes are streamlined, these tasks are being integrated into the designer’s role. A designer reports:

“The relationship between designer and manufacturer has become more direct; companies no longer have in house pattern makers or sewers.

Patterns and samples are made by the manufacturer.”

CFDA survey respondent

Tight deadlines are met by using time-saving digital tools, from storing past blocks to be reused in digital form, to employing 3D pattern making technology, digital color ways and

collaborative platforms such as PLM. The designers surveyed agreed that the fashion-design process is more collaborative than it was ten years ago. The new designer is a collaborator.

In this competitive landscape where everything is available to everyone, designers must operate with a new awareness of the impact their decisions have on factors such as: time to market, cost, price, marketability and how the end product will be merchandised to whom and when. For brands to be

successful, they must be able to rely on their designers to create not only with the end consumer in mind, but also consider the retail environment, be it online or brick and mortar.

“The merchandiser role has become the most powerful, over quality and innovation.”

CFDA survey respondent

Brands seek to outshine their competitors. The designers’ aesthetic is displayed through total looks and shopping displays, which implies that

the merchandiser and the designer work hand in hand. For smaller brands, the designer must also take on the role of merchandiser. Attesting to a new awareness and polyvalence needed in the competitive marketplace, another respondent describes what is required by a new designer:

“Working knowledge of how designers’ decisions impact the entire life-cycle of a garment from cost structure to customer experience.”

CFDA survey respondent

IS FASHION TREND-LESS?

“Why are designers still searching desperately for trends when there are no trends?”

John Fairchild under the pseudonym Countess Louise J. Esterhazy, 2014

In the editorial article The Countess Talks Trends — or Lack of Them, ex-chairman and editorial director of Fairchild publications John Fairchild makes the case for newfound accessibility and visibility of pretty much everything. Consumers are more confident in their shopping choices and less loyal to brands, mixing pieces from different labels and different price categories together to create original looks. This is how one of our respondents describes it:

“Snobbishness in fashion has gone away. Americans, in particular, and many Europeans, don’t want to be told what to wear.”

CFDA survey respondent

A ‘high-low’ movement that happily couples basics from a fast fashion or supermarket brand with a signature piece from a designer or luxury brand, is becoming the norm. This contrasts with the consumer habits of over ten years ago when a consumer would buy entire outfits from the brand or designer they were loyal to, making it, in the words of a high-end designer we interviewed, “extremely difficult” to sell basics and therefore tempting to leave these pieces out of a collection.

The rise of sports-casual wear brands such as Lululemon and product-focused, innovation-based brands such as Uniqlo attests to these new consumer habits. On the upside, products are judged on their own merit rather than their label—a positive step in terms of quality, and a demonstration of a new consumer focus on value. Yet, on the downside, the deciding factor for the consumer is mainly price.

Despite the impression this empowered and originally-dressed new consumer may give, the sameness we see across offers is astounding. Deep-pocketed buyers seek little variation from what sold well in previous seasons, making it common to see practically the same garment across all brands and across the globe. This sameness is the result of an industry playing it safe. In the shadow of the 2008 global financial crisis, companies are more risk-averse choosing to buy only what sold well in past collections. This means less differentiation on offer: a big threat to creativity.

The role of the new designer combines juggling the positive and negative aspects of these industry disruptions and confronting the resulting situations. While sameness is one of the current negative outcomes of the immense amounts of data now available in the industry, there are also benefits to be reaped. If retailers can capture the consumer imagination, designers can draw from this with more subtlety and finesse, as tools and thinking become more sophisticated.



“Keep in mind that the omni-channel revolution is ripe with opportunity... Just as many industries benefited from the capabilities of new steam-powered factories in the

early 1800s, the fashion brands that harness the power of connected data will have the chance to reap outsized gains. The key is developing an enlightened omni-channel strategy that enables educated, nimble decision-making based on this data.”

John Squire, 2014

Personalization may be the positive creative reaction to this fusion between consumers and designers. If the role of the designer is indeed becoming an interpreter of consumer dictates, then working in a collaborative process could be the way for designers to continue exercising their creative and artistic sides. Knowing what will be purchased, and what won't be, could benefit creativity, not just sales, and even be inspirational.

LUXURY LEADS

The role of the designer in the luxury sector has also changed in recent years, although not in the same way. In addition to the usual requirements of 'more, quicker', the luxury fashion designer is also subject to demands related to diverse merchandise and licenses. They sign off on sunglasses, fragrance licenses and lend their names to other brands and categories for one-off capsule collections.

Another change is apparent in the way luxury designers operate: while taking the helm of fashion houses,

they simultaneously drive their own signature label, where their creativity can be expressed more freely. However, Hermès' recent appointment of Nadège Vanhee-Cybulski to womenwear may indicate a trend in the other direction: Hermès publicly acknowledged the perceived advantage of having her working exclusively for them.

Luxury is also leading the way on another front, encouraging and sponsoring young talent. Kering organizes an annual Empowering

Imagination design competition in association with NY's Parsons, The New School for Design. In 2013, LVMH launched its Young Fashion Designer prize, open to designers under 40 years old. Providing support and much-needed media attention to young up-and-coming designers, these competitions also build brand reputation and esteem with the youth, new designers and consumers.

TRANSPARENCY AND IMMEDIACY: THE NEW NORM

Luxury houses are also leading the way in confronting and controlling designers' biggest fear and perceived threat: transparency. As runway shows from luxury houses are broadcast live over the internet, designers are forced to rely on new parameters of exclusivity. Luxury brands have taught us that the fear of copycats needs to be replaced by innovation and sharing. Building and controlling brand communities

works better than limiting them. Reinterpretation and instant feedback can be used advantageously, feeding back into the creative process.

The live streaming of previously exclusive catwalk shows over the internet, and the more recent expectation of having these collections, seen for the first time, instantly available

to buy, are becoming the norm. They illustrate how luxury fashion houses are taking the lead from the digital disruption to their industry, where immediacy and transparency are being pushed to their current limits. A general lesson can be derived from this trend: disruption needs to be fostered, rather than circumvented.

There has been an ironic intensification at opposite ends of the consumer information spectrum. There is an overload of information available on the internet about certain aspects of the fashion offer such as price, selection, and brand story. However, a complete lack of information remains about how garments are made, which creates unrealistic consumer expectations.

TRACEABILITY AND SUSTAINABILITY: A LONG WAY TO GO

“Buying a mystery will be an absurd concept soon. There’s no luxury in a riddle.”

Honest By founder and designer Bruno Pieters

Traceability advocate and former art director of Hugo by Hugo Boss argues for greater transparency across the supply chain. However, traceability is not considered an urgent issue for the US designers interviewed, a majority expressed that traceability was not an issue or a deciding factor in their everyday choices. And as one designer hastened to remind us:

“Short-term is a chronic problem in the garment industry.”

CFDA survey respondent

While, according to responses to our survey, traceability and sustainability remain of secondary importance to many, the media attention given to this subject keeps increasing. Certain brands, fast fashion as well as luxury, are leading the way. The UK’s Tesco fast-fashion brand F&F pride themselves on sustainable material use and reducing wasteful samples through 3D technology. Giants like H&M are leading the way in terms of fast-fashion sustainable practices, such as a closed loop for textiles and clothes, where clothing no longer wanted can be recycled into new garments.

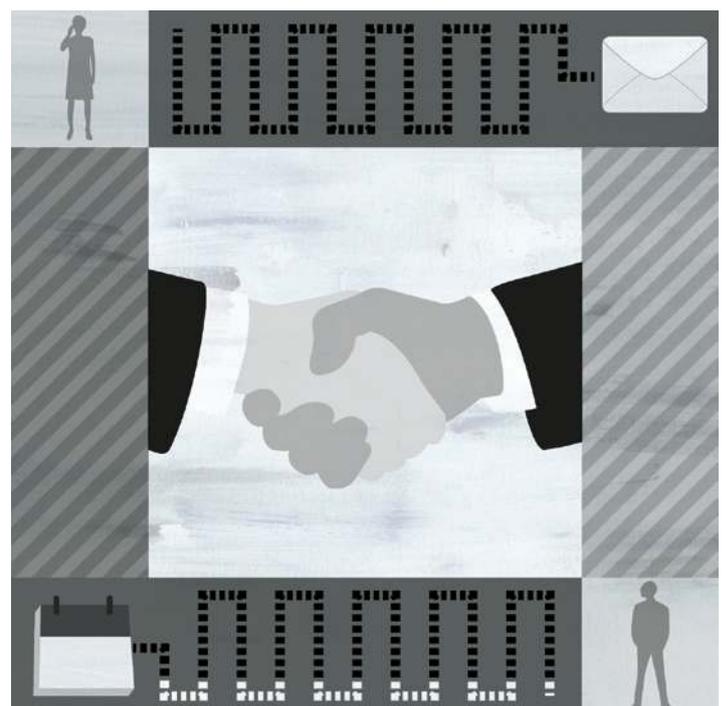
“The process of sustainability impels the fashion sector to change. To change towards something less polluting, more efficient and more respectful than exists today; to change the scale and speed of underpinning structures and to infuse them with a sense of interconnectedness.”

Kate Fletcher & Lynda Grose, 2012

Designers can integrate this rising area of polemic and possibility by considering it an aspect of branding: a way to

boost consumer perspective, a way to gain respect for their design practices, as their brand tries to differentiate itself in an overcrowded market. People are keen on making an emotional connection with the brands they choose. Ethical brands have a big advantage, as they have a richer, more emotional story to tell—one which embraces the transparency required by the digital age. It is the new designer’s role to mediate this practice, as they are at the root of the product, and consumers are becoming weary of traditional marketing.

If the role of the designer is becoming that of brand storyteller, then sustainable, transparent and environmentally friendly practices, that provide long-term operational advantages, may be the way forward.



WHAT ROLE FOR SOCIAL MEDIA?

Transparency is an increasingly important issue not only in terms of product traceability, but also in terms of expecting to know everything about a designer and interact with them, through social media platforms.

Engaging with one's customer through social media has become mandatory. While bigger brands may have a person dedicated to this, for designer or niche brands it becomes part of the designer's role to become the voice of the brand. As one respondent notes, social media, especially when used for direct relationships, has indisputable advantages:

“Social media has given me the ability to connect to large numbers of clients on a real-time basis. This has made my job far more immediate and far more informed, as I am able to test the waters as I go, as opposed to just creating and hoping, as was the case in the not-so-distant past.”

CFDA survey respondent

Or, as another designer puts it when asked what skills an up-and-coming designer should have:

“The need to be a voice rather than a designer. The need to be able to tweet, instagram and blog on a regular basis.”

CFDA survey respondent

The importance of the designer voice, public image and popularity is also apparent in the growing number of celebrities-turned-designers, harnessing the pull of their name to give popularity to their fashion brand. For those interviewed, this was a point of tension, certain voicing the idea of an unfair advantage.

CONCLUSION

Designers are finding their footing in a digitally disrupted landscape. Our survey clearly shows that designers are aware they are living through a time of transition. Speed-to-market; facing a confident consumer with revised expectations and shopping habits; diminishing trends and brand loyalty; a changed interplay play between exclusivity and transparency—all these themes point to a leveled-out playing field where the idea of value is being redefined.

Tomorrow's designer is a central link in an interdependent supply chain, along which digital data flows. Manufacturers, marketers, merchandisers and even consumers have become inseparable parts of fashion design. New forms of communication via social media platforms, combined with a market where everything is available to everyone, have empowered a once passive consumer. As a consequence, designing has become more an interpretation of—rather than a suggestion of—consumer desires.

The design-dedicated silo is being shattered. Collaboration is the new framework.

The changed landscape of the international fashion industry and the subsequent evolutions in the way fashion designers work, create, collaborate and share, point to the advantages of creating within a framework of the most innovative technology solutions available to fashion professionals.

Lectra's fashion-specific solutions integrate 40 years of industry experience and leading edge technology with best practices to keep companies ahead of the game.

3D virtual prototyping solutions transform design and product development by offering designers and pattern makers the ability of viewing and adjusting garments, virtually, in real time. Digital grading and fit checking all sizes virtually, means that designers can check fit across

styles and size ranges. Time to market is reduced thus allowing designers to be more responsive to consumer wants. The creativity and brand DNA that ultimately define a company's value in the eyes of its customers, is enhanced by better control and visibility.

Lectra's product lifecycle management (PLM) solution is another example of how technology can help simplifying a designer's life. Data input is reduced and visibility of a product's evolution through its sourcing and industrialization cycle is increased. Designers can literally see the evolution of their creations as they are realized and brought to market thus bringing closure and satisfaction to their efforts. Technology can help leverage a designer's vision while also freeing them from the non-creative tasks that bog them down. Let designers do what they do best: Design.

*Thanks to all those
who participated in the online survey
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Every Lectra Fashion Project benefits from Lectra's 40 years of fashion expertise in the form of consulting, training, and ongoing support. Lectra's consultants evaluate customer needs and process to propose appropriate solutions to support their unique business goals. Contact one of our global offices today to find out if a Lectra Project is right for your business.

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Lectra has offices worldwide.
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Lectra in Fashion

With over 40 years of expertise in fashion and apparel, Lectra's mission is to provide a complete spectrum of design, development, and production solutions to confront 21st-century challenges. From first creative spark to final product, our professional services address an end-to-end process. We support the day-to-day operations of our customers in over 100 countries for around-the-clock process optimization. From fast fashion to luxury to ready-to-wear, Lectra's 23,000 customers in markets as diverse as casual, sports, outdoor, denim, and lingerie represent every development and sourcing model imaginable. Beyond suppliers and manufacturers, they are the brands you love and the stores where you shop.



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