The earliest pieces from autumn-winter collections are now arriving in stores as early as May, and spring-summer collections begin their roll-out in November. In addition to these pre-collections, created in advance of the main lines, there are one-off editions, external collaborations and other capsule collections that are usually designed at the last minute and delivered on the spot.

From the search for raw materials, through design and production, and on through the marketing of finished products, there are many different calendars that are a mix of longer and shorter lead times. Of course, each brand follows its own schedule depending on its structure, positioning, production method and distribution network. But an overall trend towards bringing calendars forward is emerging.

As a laboratory for the industry’s latest trends and developments, Première Vision wanted to assess these changes by means of a Europe-wide survey. Conducted by the Institut Français de la Mode between November and December 2019, the survey canvassed 1,765 professionals as to the frequency of their collections, their delivery breakdown, and, lastly, the time periods dedicated to the search for materials, which remains the starting point for their creative process.

The survey was carried out in the five European countries - France, Germany, the United Kingdom, Italy and Spain - that account for nearly 75% of European clothing consumption. The sample group surveyed encompassed the entire industry, from luxury goods to mass market, including haute couture, young designers, premium brands and mid-range brands.
The first finding of this study is that the number of collections and the frequency of deliveries are no longer necessarily correlated. Some 49% of European brands have maintained a frequency of two collections per year, but 71% of them stagger their deliveries more frequently.

This trend towards an increase in the number of deliveries is even more evident among the 42% of European brands whose creative process is no longer conducted on a semi-yearly basis. These brands report having four to ten delivery rounds per year. Some 19% of those surveyed report an even higher number. For these companies, updating their offer once or twice a month, or even on an ongoing basis in some cases, helps to maintain customer curiosity and generate in-store traffic.

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In 2015, a prior study by Première Vision regarding collection calendars indicated that 63% of the brands surveyed kept to a semi-annual rhythm. Since then, while the pace has for the most part intensified, as was shown by the previous results, differences still remain from one market segment to another.

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**STAGGERED FREQUENCIES**

**DENSPER CALENDARS**

LUXURY

Pre-collections are now well established for 72% of the brands surveyed. 48% of them indicated delivery frequencies of more than 4 times a year, and 20% of them even indicated delivery frequencies topping 12 times a year. At the same time, 23% of those surveyed reported having more than four creation periods. 12% specify that they produce a minimum of eight different collection proposals a year... This multiplication of capsule collections, collaborations and other drops stimulates a constant curiosity in the store windows and shelves at these companies. It generates a more frequent, even ongoing, demand for materials.

**AFFORDABLE LUXURY**

So-called «premium» brands have generally adopted the same pace as luxury brands. While a majority (51%) are still organised around two creative periods, 26% develop four collections, and only 4% of them design and develop more than eight collections per year. For 70% of the total, there are nonetheless a minimum of four deliveries per year.

**MASS MARKET**

While continuous deliveries were initiated by just a few leaders in this market segment, there are now 40% of them delivering their products more than 10 times a year. Moreover, 59% of the companies surveyed develop at least four separate collections per year. And deliver at least an equal number of times.

20% OF LUXURY BRANDS have more than 12 deliveries per year in 2019

49% OF EUROPEAN BRANDS created 2 collections in the year 2019, compared to 63% in 2015

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70% OF PREMIUM BRANDS have a minimum of 4 deliveries a year

40% OF MASS-MARKET BRANDS have over 10 deliveries a year
**MID-RANGE**

A majority of brands (54%) are sticking to the traditional calendar of two collections per year. Nonetheless, 69% of them are following the mass-market model, with a minimum of four delivery cycles.

**YOUNG DESIGNERS**

Young designers represent a unique model because of their small structures and targeted business activity. Most of their companies are organised around two collections per year, with a slightly higher number of deliveries.

**MATERIALS ARE ALWAYS THE STARTING POINT**

In 57% of cases, across all companies, individual materials are selected for each individual collection. As these collections are tending to multiply, the search for new products is therefore increasing. Some 37% of the designers and buyers surveyed said that they are now selecting materials throughout the year.

Première Vision further questioned survey participants as to what would be the ideal dates for its Paris show in the context of this more sustained creative process. The results show that 72% are in favour of an earlier show, held at the end of January for the first half of the year, and 69% were in favour of a show scheduled for the start of July for the second half of the year.

This consensus gains 3 points in both cases (rising to 75% and 72% respectively), if we consider only the European leaders (432 of the 1,765 surveyed). Examining a closer breakdown of the results, the demand for an earlier edition held in July is also strong among leather-goods specialists (72%) and men’s fashion specialists (73%). With the men’s ready-to-wear shows taking place in June, the search for inspiration and materials for the following season begins before the summer break.
CONCLUSION

The results of this study reveal a diversity of collection-development models from one market segment to another, and even from one company to another. The time dedicated to researching materials, design times and delivery schedules can be aligned with different calendars. However, product turnover in stores is globally more frequent. Research and design times have also been accelerated in comparison to the findings of the 2015 study. The design and creative process itself has also been radically transformed. We no longer design collections consecutively, but rather several at once in order to take into account multiple deliveries. In fact, researching and selecting materials is no longer limited to a specific time of year. It is now a non-stop activity for almost half of the industry’s players! Première Vision’s Marketplace, its digital e-commerce platform launched in September 2018, provides a solution to this changing situation.

It should also be noted that the growth of pre-collections in the luxury universe has gradually encouraged all fashion brands to move up their deliveries to stores. And these early-season pieces, which were once a continuation of the previous collection, are now designed to catch the eye and satisfy an online clientele looking for the latest trends. As a result, designers must start creating the new season earlier, always starting with the choice of materials. These designers are thus more than favourable to Première Vision advancing its dates accordingly.

This view is also shared by the exhibitors at the two Première Vision Paris shows. Alongside this particular study, a separate survey was conducted of exhibitors at these events. Some 66% are in favour of bringing the dates forward to the end of January, and 70% favour moving the show up to the beginning of July. This consensus reaches as high as 75% when taking into account the views of exhibiting weavers only.

Lastly, the study carried out by the Institut Français de la Mode also confirmed the importance of the international event that is Première Vision Paris. Multiplying collections leads designers and buyers to look for new products more often, so they are increasingly in need of stocking up on creativity, finding new partners and building ties with their material suppliers during these meetings at Paris Nord Villepinte.

ABOUT THE PREMIÈRE VISION GROUP

Première Vision is the global leader in upstream creative-fashion trade shows. From 15 Lyons weavers in the early 1970s to the more than 2,000 exhibitors at Première Vision Paris today, the Première Vision group’s strategy has remained the same: to support the development of the international fashion industry and major market evolutions through its services and 12 events per year, to which has now been added a unique online tool: the Première Vision Marketplace, managed by the company’s subsidiary, Première Vision Digital.

premierevision.com/en/