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# Evolution versus entrenchment: Debating the impact of digitization, democratization and diffusion in the global fashion industry

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## Introduction

In the report *The State of Fashion 2017*, written by Business of Fashion and the McKinsey Institute (2016), industry executives used three words to describe the current state of the fashion industry: uncertain, changing and challenging. indeed, the fashion industry is undergoing dramatic transformations, from digitization and the rise of ‘see now, buy now’ fashions, to brands redefining

the function and timing of fashion weeks, and increasing levels of global integration and competition (Crewe 2017). As such, the fashion industry has been recognized as a valuable lens through which to explore significant and ongoing changes to the production, curation and consumption of goods, services, and experiences (Brydges et al. 2014; Brydges 2017; D'Ovidio 2015; Hracz et al. 2013; Lavanga 2018; McRobbie 2016; Pratt et al. 2012).

Drawing inspiration from this stream of scholarship, we organized four sessions titled *Trending Now: The Changing Geographies of Fashion in the Digital Age* at the Royal Geographical Society and Institute of British Geographers (RGS-IBG) conference in London in August 2017. In these sessions, researchers and practitioners from a wide range of locations and disciplines – including fashion studies, media studies, cultural economics, business and geography – came together to share research related to the structures, labour dynamics, spaces, value propositions and practices of the contemporary fashion industry.

While a range of issues were discussed, the sessions were connected by an overarching theme. Namely, the extent to which power in the fashion industry is expanding or consolidating. While there is a prominent discourse that states that structures, systems and spaces within the global fashion industry have been (and will continue to be) disrupted by new actors, technologies, practices and cities, we collectively questioned whether the fashion industry has really entered an era of democratization, or if established power structures remain entrenched. Through empirical case studies from a variety of geographic contexts – from India to Italy – about different actors and activities within the industry, each presentation contributed new evidence and perspectives to this debate. The discussion below distils some of the key themes that emerged.

## **Established and emerging fashion capitals**

Is the global geography of fashion still defined by the ‘big four’ of New York, London, Milan and Paris (Beward and Gilbert 2006)? Or is democratization shifting the balance of power to new spaces including emerging fashion capitals, like Stockholm (Hauge 2007) and Berlin (McRobbie 2016)? In exploring the answers to this question, the presentations during the sessions produced some conflicting results. For example, Taylor Brydges from Stockholm University, Sweden and Brian J. Hrac from the University of Southampton, United Kingdom, provided a case study of independent fashion designers in the Canadian fashion industry. Here, the authors explored the ways in which independent fashion designers strategically practice different forms of mobility (temporary, mediated and virtual) in order to access and benefit from places, networks, communities, events and resources within the national fashion system. Their research found that by engaging in these different forms of mobility, designers did not need to be in an established urban centre (such as Toronto or Montreal) to build their business, suggesting that the fashion industry exists – and designers can thrive – in a variety of urban, suburban and/or peripheral locations.

Felix Muller, from the Leibniz Institute for Research on Society and Space in Germany, presented research that also illustrates the nuanced entanglement of established and emerging fashion cities. In his research on the global fur trade, Muller found that new centres of fur trade (e.g. Hong Kong), of fur fashion design (e.g. Copenhagen) and of luxury fur retailing (e.g. Beijing) are emerging, supporting the notion that the geographies of fashion are indeed expanding.

Similarly, Tania Allan-Ross and Tracy Kennedy from Otago Polytechnic, New Zealand highlighted the ways in which the emerging ‘new guard’ of New Zealand fashion designers are harnessing technology to overcome their geographical isolation in order to connect with fashion communities and consumers around the world. In so doing, they demonstrated that it is possible to be a successful and sustainable independent designer from almost anywhere.

Despite these apparent opportunities, however, there are also significant challenges facing peripheral and/or emerging regions that are trying to develop their local fashion industry. For example, Anouk Duivenvoorden, Marina Gertsberg and Rachel A. J. Pownall from Maastricht University in the Netherlands, shared a case study of the South/Limburg area of the Netherlands in which the fashion industry was evaluated as a tool for regional economic development. Although the opportunities to develop the fashion industry in a peripheral city, such as Maastricht, could be significant if the city focuses on a clear expertise that the region has (e.g. lace), the authors found that the current policy framework seems to be too broad and fails to create a network among a diverse range of stakeholders (for example, between the city and alumni of the fashion academy who relocate after graduation). As a result, the city faces challenges in terms of being able to compete with more established centres, such as Amsterdam.

### **The growing importance of intermediaries**

Within the fashion industry, intermediaries have long served as key creators and communicators of value, distinction and brand loyalty. However, as the marketplace becomes more saturated, globally interconnected and competitive their importance and influence are increasing (Hracs et

al. 2013; Lavanga 2018). Yet, what is still unclear is the extent to which new intermediary actors are able to reshape or replace traditional market-making mechanisms and established actors.

Perhaps the best example here is the ongoing debate in the fashion industry regarding the role of fashion bloggers in disrupting and shaping new conversations within the industry. A number of presentations addressed this theme. For example, Chrissy Hilton-Gee of Southampton Solent University in the United Kingdom focused on the role of digital technology in fuelling an increased call for realism in the fashion industry. Here, the phenomenon of street-style bloggers was interrogated with respect to the ways in which ‘ordinary’ or ‘real’ people are facilitating a growing sense of democratization in the fashion industry. It was argued that the advent of street style is putting more power into the hands of consumers and non-traditional actors.

In another context, Arturo Arriagada from the Universidad Adolfo Ibáñez, Chile presented research on fashion bloggers based in Santiago, Chile. Arriagada argued that fashion bloggers are a new and important intermediary in the fashion industry, from their role in promoting specific types of fashion consumption to translating local and global fashion trends, while also adding meaning and value to fashion goods. Interestingly, branding agencies were also identified as an emerging key intermediary who serve to connect bloggers (and their followers) to global brands, such as H&M and Zara. Brydges and Hracs also argued that specialized and highly localized intermediaries, such as public relations firms, are playing an increasingly important role in the industry through supporting the expansion of independent fashion designers beyond their local or niche markets.

However, there is also evidence that disruption in the industry is neither an assured nor a linear process. For example, Charlotte Dwyer of the University of Utrecht, the Netherlands found that new intermediaries are facing significant challenges in disrupting long-established and traditional values and practices within the industry. Felix Mueller's analysis of the fur industry also provided an illustrative example of the enduring role of established intermediaries, such as auctioning hubs for raw materials, brokers and trade fairs within the circuits of valorization of fur.

### **Challenge and change within fashion retail**

Within the fashion industry, the increasingly cut-throat competition between physical shops and virtual platforms and the future of fashion retailing has become a dominant narrative. The sessions helped to nuance this conversation by considering the impact of new technologies and platforms, including Instagram, as well as specific spatial and temporal dynamics associated with temporary pop-up shops, fashion weeks and festivals on the geographies of fashion retailing and consumption and the strategies that producers use to 'stand out in the crowd' (Hracs et al. 2013).

First, Beth Wright from the University of Southampton, United Kingdom presented research on the retailing strategies of pop-up shops. While the concept is not new, the idea of a shopping mall made only of pop-up stores is new. The case of Boxpark in the London neighbourhood of Shoreditch – described as 'the world's first pop-up mall' – is a unique space made of 61 shipping containers hosting a diverse range of stores. Wright's findings revealed that the average rental period was eighteen months (a time frame that seems quite long for a 'temporary' pop-up shop), highlighting how temporality can serve as a successful, yet arguably

imagined, marketing strategy. Through the twin strategies of targeting tourists and playing with the 'buy now or never concept', Boxpark will be expanding to include two new locations in London.

Margo Barton from Otago Polytechnic, New Zealand also presented research on the changing relations between designers and consumers through a case study of Citizen Stylist®. Citizen Stylist® is a pop-up participatory action research project that proposes a democratic system of fashion styling by promoting a horizontal, rather than vertical, approach to the geography of fashion curation and consumption. The case illustrated how engaging with these new spaces allows designers to foster a more intimate engagement between consumers and clothing.

However, while the fashion retail landscape may be opening up for independent designers, significant challenges remain. For example, Alice Janssens and Mariangela Lavanga from Erasmus University Rotterdam, the Netherlands reflected on the increase of piracy in the digital age and the ineffectiveness of the current intellectual property (IP) protection system available to emerging fashion designers in the United Kingdom. In discussing the different strategies that designers use to cope with the risk of being copied – including the online and offline disclosure of designs, the use of high-quality textiles and materials and the preference for local manufacturing locations – it was found that a trade-off exists between online promotion and protection. Indeed, designers are highly selective with respect to what designs they promote online and through what channels. Their research found a clear divide between large firms who can rely on extensive legal departments, and independent

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fashion designers and small firms who lack financial means to protect their rights or to pursue those who copy or steal their intellectual property. This level of helplessness, which echoes the examples given by Angela McRobbie (1998) twenty years ago, suggests that important power dynamics and inequalities in the industry persist. However, Janssens and Lavanga also showed how aggrieved designers can protect their designs and combat piracy through new practices such as ‘naming and shaming’ those who violate copyright laws on social media platforms.

Moving to virtual retailing spaces, Steve Wood, Iain Watson and Christopher Teller from Surrey Business School, United Kingdom, along with James Faulconbridge from Lancaster University, investigated the ways in which large firms are adapting their decision-making processes to thrive online. While it is often believed that online retailers are faster and nimbler than their physical retail counterparts, the reality is much more complex. Indeed, their research into three leading online fashion retailers in Germany revealed the conflict between traditional pre-digital and evolving post-digital work practices. Even though the possibilities for increased efficiency offered by big data are tremendous, Wood and his colleagues found that decision-making processes within these organizations are very slow in terms of using this data in order to react and capitalize on their available data. This suggests that within firms existing structures and power hierarchies may limit the transformative potential of new platforms and distribution practices.



## **Sustainable fashion futures?**

While once thought to be the domain of independent actors (Brydges et al. 2014; Brydges 2017), recent years have seen a growing range of actors, including global brands such as H&M, promoting more sustainable fashion consumption practices (for example, through using organic textiles and/or introducing in-store recycling programmes). We were particularly interested in the dynamics and geographies underpinning the rise of new movements in fashion, like slow fashion (Fletcher 2010) and the extent to which transparency may lead to increased sustainability. Two interrelated trends emerged during our sessions: first, a ‘wake-up call’ to designers to rethink their role in designing for sustainability, and second, a consideration of the ways in which consumers are becoming more aware of sustainability issues.

For example, Susan Dillon from Sheffield Hallam University, United Kingdom discussed the importance of designers being able to develop products that fit into the circular economy, such as designing for longevity in order to prevent waste. Dillon illustrated the ways in which technology driven, design-led approaches to sustainability are emerging, and emphasized the roles of the individual designer’s skill and craft as central to creating a more sustainable fashion industry. By extension, Julia Schaak from Heart\_of\_Code e.V, Germany explored the evolution of sustainable and slow fashion in the context of the industrialization and commodification of trends. Julia Schaak reflected on the importance of transparency, and the role of open source and circularity in promoting a more sustainable and democratic fashion industry. She also highlighted the move towards a ‘Finish-It-Yourself’ (FIY) model that connects designers and final consumers.

Turning from designers to consumers, Rimi Khan from the University of Melbourne, Australia reflected on the necessity to contest the one-directional ‘geography of responsibility’ that asks western consumers to

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change their buying habits in order to improve the conditions of workers in other parts of the world. The findings illustrated the multidirectional, localized and transnational networks of cultural production that exist in Asia, and how these reshape understandings of ethical fashion. In the same vein, Karan Khurana from EiTEX, Bahir Dar University, Ethiopia and Marco Ricchetti from Sustainability-lab.net, Italy explored the dynamics and the differences in the perception, acceptance and meaning of the slow fashion movement and the issue of transparency among consumers in a diverse range of countries: Italy, Brazil, India and Ethiopia. This presentation emphasized price sensitivity in a number of these markets, as the price of a garment is still often the most important factor shaping consumer buying patterns.

### **Concluding remarks**

A decade ago, Aspers and Skov (2006) highlighted that stability was a key concern in the fashion industry. In reflecting on our day of presentations, it would appear that the tension between evolution and entrenchment in the fashion industry is just as relevant, and perhaps matters even more, after a decade of digitization and technological advancements (Crewe 2017). The sessions illustrated that there are myriad opportunities for disruption, from the ‘showdown’ between bricks-and-mortar and online retailers and established and emerging centres of fashion, to the ability of new intermediaries to disrupt the industry and the potential for sustainability. But they also remind us that old power structures in the fashion industry are not disappearing. Indeed, the

reality is more complex and specific changes appear to be occurring at a slower pace than many anticipated or hoped for with varying degrees of disruption and depth.

Based on these presentations, we can also highlight several areas for future research. First, the integration – rather than the juxtaposition – of old and new intermediaries as well as offline and online retail environments, and the enlargement of the geographies of fashion, open up new ways to look at the strategies of firms and designers as they seek to cope with uncertainty, stand out and remain competitive. In addition, one of the biggest challenges facing scholars is to relate to the critical issues of environmental, economic, social and cultural sustainability. As the pace of the sustainable fashion revolution is accelerating, an increasing number of fashion conglomerates, large firms and fast fashion companies are feeling the pressure to comply with stricter environmental and working standards, to increase transparency in their supply chains and to develop Corporate Social responsibility (CSR) programmes.

Yet, we are still learning how to address the monumental sustainability challenges that the industry faces, and many presentations (understandably) highlighted more problems and challenges than solutions. While environmental sustainability has been largely studied in a diverse range of disciplines, the social and cultural aspects are still in need of better conceptualization and operationalization. In addition, consumers in different parts of the world value sustainability and transparency in different ways, adding an additional dimension of complexity to the picture. Third, we need to open up the debate to non-western case studies and empirical research. Research is being done in many different contexts and scales, but comprehensive comparative analysis is still quite limited.

In reflecting on this day of discussion and debate, it is apparent that there are still many questions that

need to be addressed and research projects that need to be undertaken. A key strength of the day was the interdisciplinary nature of the event, with researchers from a wide range of disciplines sharing research and discussing ideas in the same room. While the key debates from the day shed some light on where we can go from here, it is important to consider not only ‘what’ kind of research is needed, but ‘how’ to get this research done. The number of common research threads across a range of disciplines illustrates the value in bringing together a diverse range of scholars to share ideas and exchange their research. Indeed, these are disciplines that do not always come together, and we welcome and encourage proposals for how to move forward together.

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