

2. The field of fashion in the digital age: Insights from global and ‘not-so-global’ fashion centres

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Abstract

In this chapter, drawing on Bourdieu’s concept of the field, we examine the system of actors that are involved in creating the aesthetics of fashion. We adopt a dynamic approach that considers the diversity of ‘fields’ associated with different fashion centres and the constellation of sites within each field (including manufacturing, retailing, marketing and consumption). Drawing on case studies from both established and emerging international fashion centres, we investigate how digital technologies are transforming the field of fashion at different scales and in different geographic contexts, and consider implications for structures, power relations and spatialities in and of the industry.

Introduction

Although fashion is one of the oldest industries it is also one of the most versatile and innovative. Like most industries, fashion encompasses a range of activities, including design, production, distribution and consumption. As a cultural and creative industry, it is a sector that produces goods valued primarily for their aesthetic rather than utilitarian qualities (Scott, 2000), with its fashion products being subject to rapid change and high levels of market volatility (Entwistle, 2009). These aesthetic qualities are temporally and spatially sensitive, which accounts for the constantly changing form of knowledge that dominates the industry (Entwistle, 2009). Such an unstable form of knowledge depends on a dense constellation of actors in order to be legible. In this chapter, we examine the system of actors that are involved in creating the aesthetics of fashion, or what Bourdieu (1993a) terms ‘the field’ (see also Hauge and Rykkia, this volume; Nyfeler, this volume) and in doing so, we explore the tension between tradition and innovation (*tension 2*), as well as the tension between isolated and interconnected spaces of creativity (*tension 3*).

In examining such a system, we adopt a dynamic approach that considers the diversity of ‘fields’ associated with different fashion centres (from the ‘global’ to the ‘not-so-global’) and the constellation of sites within each field (including manufacturing, retailing, marketing and consumption). The industry has also been fundamentally transformed by digital technologies, as well as a new range of intermediaries – actors operating between producers and consumers, such as fashion bloggers – which have emerged and are disrupting the old system of production and distribution (Comunian et al., this volume; Crewe, 2017; Brydges and Hracs, 2018; Janssens and Lavanga, 2018; Lavanga, 2018).

Here, we are particularly interested in the implications that recent transformations have for the structure and composition of fields, as well as their power relations and spatiality. As such, in this chapter we seek to contribute to tension 2, by exploring how industrial dynamics in the fashion industry are evolving in the digital age, and to tension 3 by examining the relationship between more isolated or marginal spaces of creativity and leading industry centres (see also Comunian et al., this volume).

The chapter adopts a collaborative and comparative approach utilising data collected from multiple fields of fashion around the world. This mixed-method design includes a textual analysis of international trade publications, newspapers and web materials, as well as over 250 interviews with industry actors in established (such as New York and Milan), and emerging (such as Toronto, Montreal, Stockholm and Amsterdam¹) centres. Interviews were conducted by the authors with fashion designers (including small independent designers and designers employed by larger fashion houses), as well as other actors in the field, such as those working in fashion education, retail, criticism, public relations, government, trade fairs and so on. The research also draws upon observation in a range of spaces, including boutiques, fashion weeks, trade fairs, exhibitions, studios, and manufacturing facilities.

The findings are presented in three parts: an overview of the field of fashion, the impact of digitalisation in challenging established industry norms fashion, and finally, the continuing role of place.

¹ Inspired by many discussions at CCE and beyond, we decided to collaborate on this chapter in order to pull together and reflect upon both the commonalities and unique perspectives from our research.

Literature Review: The fashion industry as a socio-spatial ‘field’

The fashion industry is a product of a complex array of actors and institutions embedded in place. A key way in which to analyse the industry is through the concept of ‘field of cultural production²’ (Bourdieu 1993a). According to Bourdieu (1993a), each field operates like a game, with its own rules, forces, players and strategies (Entwistle, 2009). Cultural fields are relatively autonomous from larger fields, structured by economic and political power and class relations, but also influenced by them.

Two main forces are at play in the field: one defined as *autonomous* (the aesthetic considerations not subordinated to economic forces) and one defined as *heteronomous* (economic criteria associated with the market), which structure the field and determine the strong or weak position of creators both within the market, and within the cultural sphere (Bourdieu 1993b; Entwistle and Rocamora 2006). As an example, a musician can be very well positioned in the market, producing commercial music, or very special pieces that are appreciated by only a small intellectual circle. This also applies to fashion designers, whose work is subjected to different markets and aesthetic rules.

The fashion designer is dependent upon the work of many different actors: textile and clothes producers, retailers, marketers, consumers, but also those who define aesthetic value, including magazine editors, media critics, bloggers, and educators (McRobbie 2016). As intermediaries, gatekeepers assume a vital importance because they qualify aesthetic commodities and determine

² Bourdieu included the fashion industry in the field of cultural production, arguing that there is a strong conformity between haute couture and haute culture (Bourdieu 1993b)

their value. Consumers are also an important component of the field, setting patterns of demand and structuring the market.

Fashion also emerges through a global network, consisting of fields located in different places. Although Bourdieu's notion of a cultural field is not an explicitly geographical concept, he does recognise the way in which fields vary across time and space. He cites national variations in cultural fields, and also recognises the importance of geographic capital in establishing the value of artists and their work, with artists coming from places like Paris more likely to move into dominant positions within a cultural field than artists from more provincial centres (Bourdieu, 1993a). Subsequent authors have further developed a spatial conceptualisation of fields, highlighting the bounded nature of many fields (Entwistle, 2009; d'Ovidio, 2015).

As an industry, fashion tends to concentrate in particular cities around the world, known as fashion's world cities. In particular, the industry is dominated by London, Paris, Milan, and New York (Kawamura, 2004; McRobbie, 2016; Rantisi, 2002, 2004). These cities hold power in the hierarchy of world fashion cities, and to some degree, they set the trends for the rest of the industry (Larner and Molloy, 2009). This is often attributed to the concentration of international buyers, fashion media and finance present in these cities, which has the effect of consolidating power in a few key locales (d'Ovidio, 2015; Lavanga, 2018; Rantisi, 2004).

A crucial anchoring mechanism of the fashion industry more broadly, and London, Paris, Milan and New York in particular, are fashion weeks. A 'materialisation' of the field of fashion (Entwistle and Rocamora, 2006), such field-configuring events (Lampel and Meyer, 2008) play

an important role in bringing the local and global industry together in one place. Fashion weeks also serve as a key site through which new technologies are constituted.

One consequence of the dominance of these cities is that the specificities and attractiveness of local fashion industries outside, but interconnected to, established centres, remain poorly understood. The industry in fashion's world cities has followed a unique, historical trajectory which is difficult for other cities to imitate (Brydges and Hrac, 2019; Larner and Molloy, 2009; Lavanga, 2018; Rantisi, 2004). As such, rather than trying to follow the historical, evolutionary pathways of a world fashion city emerging or "not so global" (Larner et al., 2007) fashion markets must instead find ways to carve out their own trajectories (Brydges et al., 2018; Brydges and Hrac, 2019). For example, in Montreal, this has entailed the development of strong local buyer-designer connections, with independent boutiques and local fashion media giving special recognition to local talent. Montreal designers have also established synergies with other art fields in the city (e.g. graphic design, performing arts) (see Rantisi and Leslie 2010; Rantisi 2011).

Within the European context, we can see examples of tier-two cities that are generating considerable attention. Many of these centres are carving out an alternative identity for themselves. Amsterdam, for example, is becoming the denim capital of Europe (New York Times, 2012). The city hosts Kingpins, one of the most important denim trade events in the world, and has a flourishing denim ecosystem, including Denim City (a hub for denim innovation), a Jean School (to train future denim experts) and a Denim Days festival (recently exported to New York). The promotion of Amsterdam as a denim capital has been financially

backed by the Economic Board Amsterdam and widely promoted in diplomatic visits (Pandolfi, 2015).

While emerging centres have been gaining a lot of traction in recent years, they also struggle to retain talent, often losing designers to larger centres. This is a constant problem in Toronto, where designers often move to New York to pursue their careers (Leslie and Brail, 2011). Not only are there power dynamics within the larger international fashion arena, but within each field, there are also tensions between larger fashion brands and small independent designers (d'Ovidio 2015; Janssens and Lavanga, 2018; Leslie and Brail, 2011). This has long been evident in New York, where independent design communities have historically emerged in areas outside the established midtown Manhattan fashion district (e.g. SOHO in the 1980s, North of Little Italy in the 1990s, or neighbourhoods in Brooklyn in the 2000s). Within such communities, designers often form their own networks of design, promotion and distribution (e.g. neighbourhood based events, magazines, markets), and differentiate their products from more corporate players based on more distinctive and artistic styles – styles that eventually get co-opted by the larger brands, heightening tensions within the field (Rantisi 2002).

Fashion is thus divided into a hierarchy of individual fields, each with its own unique institutional and spatial context. Each centre has a distinct position within the global industry and a distinct visibility within the circuit global fashion events. Larger centres contain different sub-fields. While place is of fundamental importance to the field of fashion, a key question is whether new digital technologies can alter established geographies and power relations.

The impact of digital technology on fashion fields

Digital technologies have been disrupting many areas of the economy, from transportation to tourism (Martin, 2016). The combination of new digital platforms, artificial intelligence, big data, and algorithms are also transforming the fashion industry, creating new systems for value creation and capture (Kenney and Zysman, 2016). These changes have impacted all aspects of the fashion industry, including manufacturing, distribution, marketing, gatekeeping and consumption (Pratt et.al, 2012). In this section, we discuss some of these changes and the implications they hold for disrupting established positions within the field of fashion.

Digital technologies are transforming established hierarchies. Much has been said about the ways in which bloggers and influencers have altered the fashion industry, in some cases displacing traditional media institutions, including fashion editors and fashion magazines located in the fashion's world cities (Alexander, 2018). Many of these new actors have been heralded as ushering in a new, more democratic era of fashion, where anyone with a unique viewpoint can make a name for themselves (Esteban-Santos et. al., 2018).

However, the democratisation of the industry should not be overstated (Brydges et al. 2018). As social media and digital transformations continue to evolve, there is also evidence to suggest that power is once again becoming consolidated amongst a handful of actors. Indeed, bloggers that were once controversial newcomers, such as Leandra Medine of *Man Repeller* and Chiara Ferragini of *The Blonde Salad*, are today entrenched industry figures in their own right, with multi-million-dollar media and retail empires (Salibian; 2019; Segran, 2019). Once again,

emerging and/or independent actors in the industry face challenges in carving out a space in an increasingly competitive industry.

Digital technologies are also reshaping fashion distribution. Consumers are increasingly shifting from malls and high streets to virtual spaces, such as online retailing platforms (Business of Fashion, 2018). As Crewe (2013: 775) argues, “online retailing is bringing about “transformative shifts in the spaces, times, and practices of fashion consumption...The Internet has brought new fashion worlds into the homes, screens, and minds of consumers”. One consequence of the rise of digital space is that consumers are interacting with fashion in new ways (Lay, 2018). Some retailers, such as the Gap, are experimenting with augmented reality, allowing customers access to a digital, at-home dressing room. In this format, consumers can try on a larger number of items than in a conventional retail shop (Business of Fashion, 2018). While physical bricks and mortar shops still dominate the majority of fashion purchases, retailers that utilise digital technologies (such as augmented reality, artificial intelligence and large data sets) may be more successful in meeting consumer needs and in product forecasting (Business of Fashion, 2018).

Garments themselves have also gone digital. Amsterdam-based The Fabricant is the first entirely digital fashion house in the world, with the vision to make the city a digital fashion hub. The company produces digital dresses, not meant to be worn in the physical world, but rather worn exclusively in virtual space. In May 2019, The Fabricant sold its first digital dress for \$9,500 U.S. at an auction in a blockchain summit in New York (Interview). Encouraged by students and graduates and teachers, Amsterdam Fashion Institute (AMFI) and its Department on Fashion &

Technology have strengthened the school's digital fashion curriculum, experimenting with 3D visual prototyping and virtual reality, and developing a 3D Hypercraft programme.

Another way new technologies are impacting fashion is through blockchain technology, which provides a digital record that helps to better coordinate supply chains, including contracts, invoices, and inventory, as well as ethical codes of conduct (Business of Fashion 2018). This is particularly relevant to large retailers who source products from multiple subcontractors in a variety of countries (Oshri, 2018). The use of blockchain technology may also help companies address logistical and inventory problems within the industry, and better predict demand (Oshri, 2018). This could have the effect of further enhancing the strength of globalised supply chains and reassert the power of large fashion retail brands. Theoretically, however, it could also allow consumers to trace where a product was made and under what conditions, addressing the growing transparency problem and ethical crisis in the industry (Business of Fashion, 2018).

Changes to fashion retailing have also hit one of fashion's strongest institutions hard: fashion weeks. While the long-standing fashion week circuit of New York, London, Milan and Paris continues to dominate the traditional fashion calendar and attract an exclusive set of guests (e.g. fashion editors, fashion buyers, high-profile celebrities), in an era of Instagram and "see now, buy now" fashion, leading fashion brands and weeks have had to adapt. For example, it is increasingly common to see runway shows that are immediately shoppable and oriented to consumers rather than the fashion establishment (Wood, 2016).

With digitisation, the audience that such shows can reach is also expanding. Many fashion weeks are now live streamed on YouTube and other platforms, in what many have dubbed ‘digital fashion weeks’, particularly in second tier centres, such as Montreal, which ignited the movement in 2016. Digital Fashion Week, established in 2012, aims to promote industry events for digital designers in both the Global North and South (digitalfashionweek.com), enabling greater exposure for designers outside of a major fashion centre. The shift in the space and scale of fashion weeks in both long-standing and second-tier fashion centres, highlights the importance of examining isolated and interconnected spaces of creativity (tension 3). It also calls attention to the relation, and strain, between more traditional ways of doing fashion week, and new digital approaches (tension 2).

Digital technologies are also altering the marketing of fashion, which is particularly crucial for designers starting their careers. For example, in New York in the 1990s, securing a page in one of the top fashion magazines or trade publications, such as *Women’s Wear Daily*, was critical to building brand visibility. Designers in Toronto similarly describe the importance of getting the press to attend their early runway shows, and of luring them with drink tickets (interviews). Fashion designers today operate in a different landscape. In order to “stand out in the crowd” (Hracs et al., 2013), designers must be incredibly tech-savvy and position themselves online. Using social media platforms such as Facebook and Instagram provide them with the opportunity to establish their brand and opens new possibilities for smaller players to succeed in a highly competitive sector (Brydges and Hracs, 2018). With these platforms, designers can take consumers backstage, offering relatable content. Digital technologies also allow designers to interact directly with consumers (see also Hauge and Rykkia, this volume) on increasingly

personal levels, in contrast to the distant connections facilitated through older intermediaries (e.g. the fashion editor, the buyer or fashion editor). However, the more designers share online, the higher the risk of being copied (Janssens and Lavanga, 2018). Ultimately social media may increase competition between designers.

Contradictory outcomes are thus associated with digital technologies, which offer possibilities for smaller designers, mediators and centres. In the case of designers, they can use the growing array of low-cost technologies as a vital channel to access customers anywhere in the world (Brydges and Hrac, 2018; Crewe, 2017). However, the opportunities of digitalisation come at a cost. Digital platforms require immense investments of emotional and aesthetic labour from those who are working on these platforms (Leslie and Brydges, 2019) and may ultimately strengthen the power of larger players.

Does place still matter for the contemporary fashion industry?

Reflecting on the scope of these technologies leads one to consider whether geography still matters in the contemporary fashion industry. In particular, our findings suggest that the impact of technology on different fields and phases of the supply chain is reinforcing the role of place. Focusing on the globalising and disembedding effects of digital technologies overshadows the multifaceted and complex dynamics of (re)territorialisation and (re)embedding in the fashion industry. For example, new technologies may ironically facilitate increased networking in physical space. This is the case in Milan, where social networking sites reinforce connections made at industry events and parties (d'Ovidio and Gandini, 2019). In the end, it is the

combination of online and off-line relations that is crucial in building the reputation needed to succeed in the field. This is not only the case for designers, but for retailers as well.

Another way that place still matters is in the aesthetic values attached to fashion. Many regions have long specialised in certain segments of the fashion industry, owing to an association with local geographic features (e.g. climate, recreational activities or political sensibilities). Drawing on its local climate and geography, Miami specialises in swimwear, cities in the Pacific Northwest (e.g. Portland or Vancouver) specialize in sports and eco-wear, while Toronto and Montreal are both known for cold weather apparel.

Today, fashion brands use social media to cement these place-based associations, imagined or otherwise (Brydges and Hracs, 2018). For example, in the case of Canada, some brands capitalise on highly specific Canadian imagery (such as the maple leaf, mountains, and plaid), while others choose to associate themselves with a more Scandinavian-inspired aesthetic (ibid). Over time, a specialisation in a certain aesthetic style is reproduced by the skill sets and infrastructure (technical and social) that develop in a local field.

Place still matters to designers, many of whom choose which city to practice their craft in based on quality of life attributes (Brydges and Hracs, 2019). Many designers stay in Toronto, for example, rather than moving to larger centres like New York, because of the multicultural diversity present in the city, as well as the perceived tolerance of the city, and the presence of high-quality schools and health care (Leslie and Brail, 2011). Designers located in Amsterdam

for similar reasons, relating to its quality of life, international vibe or because they studied there and have friends and family in the city (Wenting et al., 2011).

However, fashion design does not seem completely footloose. Even though these location choices seem linked to lifestyle, these cities are hubs to many other creative and non-creative industries, thus suggesting that clustering and agglomeration economies may still play a role (Gong and Hassink, 2017). For example, in the case of Amsterdam, geographical proximity to Paris (ca. 3.5 hours due to a high-speed train connection) may explain why many designers prefer living and working in Amsterdam while commuting to Paris when presenting at fashion weeks, showrooms or freelancing for larger fashion houses.

Place also remains central in the realm of distribution and consumption. While digitalisation has brought access to global markets for many smaller independent designers, designers in Toronto and Amsterdam described how consumers still value service, and as a result, a majority of their sales are local, even in a digital era (interviews). In the face of these tensions, it is clear that producers, designers, and intermediaries increasingly need to navigate the mix of physical and virtual spaces, understanding their relative advantages and disadvantages. It is also clear that there are contrasting forces at work, facilitating both dis-embedding and re-embedding.

Conclusion

Digitalisation continues to shape cultural and creative industries, of which the field of fashion is no exception. Digital technologies have transformed the field of fashion at different scales and in different geographic contexts, with implications for the structure, power relations and spatiality

of the field. Drawing on case studies from both established and emerging international fashion centres, we have explored tensions relating to the impact of new digital technologies for industry practices (*tension 2*) and the divide between isolated and interconnected spaces of creativity (*tension 3*). We have illustrated that while new technologies can at times work to extend the influence and visibility of established institutions (e.g. Fashion Weeks, or brick and mortar stores), they are also introducing new innovations altogether in retail, marketing and distribution in both peripheral and major fashion centres – a trend that is likely to increase in the context of COVID-19.

And while dominant global fashion centres still command the greatest investments and are most likely to attract talent, digital technologies are allowing ‘not-so-global’ cities to assert their own identities and networks and to develop niche positions within the global fashion hierarchy.

Recent trends suggest that these technologies have the potential to disrupt established hierarchies within the sub-fields of the fashion system and global fashion centres, however, our research indicates that they can also be leveraged to reinforce the power of larger players, such as global firms, that have the capital to acquire and utilise the latest technologies.

Despite the ways in which technologies continue to alter the nature of work for fashion designers, retailers, manufacturers and other actors in the field of fashion, our findings also suggest that place continues to play an important role in the industry. The resources, social connections and historic and aesthetic associations that make a ‘place’ are also elements that are integrated into different fashion sub-fields.

A key question for the future of digital technology use is how it impacts which resources and capital (cultural and economic) accrue to which places. And, as our cases have been restricted to fashion centres in the global North, an examination of fashion centres in the global South could lend further insight into the relation between fashion, geography and digital technologies (Comunian et al. 2021). As digitisation is an evolving phenomenon, there is much that remains to be examined, but our chapter has raised some initial questions and insights which may help to inform ongoing analyses of fashion in the digital age.

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