

**FASHION FORECASTING AND SELECTION PROCESS  
OF WOMENSWEAR RETAILERS:**

*The Co-Production of Fashion by  
Producers and Consumers*

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*This thesis is dedicated to the memory of my  
grandmother, Anna Schulz.*

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The original idea for this thesis goes back many years to when I was an undergraduate student at Manchester University. Reading Simmel's essay on the stranger, I came across a footnote which mentioned his paper on fashion. Looking for a topic for my undergraduate dissertation I was immediately intrigued by the idea of studying the social functions of fashion – a topic which I perused further in my master's dissertation. I became aware that both the producers of fashion and the processes involved in its production were, at the most, only vaguely mentioned and thus a much neglected area of investigation which, I thought, would make an ideal topic for a PhD study. With this idea in mind I started my research soon to discover that the vagueness I had criticised in others became a substantial problem in advancing my own studies.

However, the support, guidance and encouragement I received from my supervisors helped me to overcome these initial hurdles and, indeed, many that followed over the years. I am thus much in debt to my supervisors Nick Prior, Jan Webb and John Dawson who have provided me with many useful suggestions and helpful comments and criticisms. I would like to express my gratitude that I was able to draw on their very different areas of expertise and experience of doing research, which have shaped this study. In particular I would like to extend a warm 'thank you' to Nick Prior, who has stayed with me the longest and who has spend much time and effort, in particular towards the end of my PhD research, in helping me through this.

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## Abstract

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Looking at the working practices of designers, buyers and merchandisers this thesis attempts to explore the dynamics that govern high street womenswear retailers. By concentrating on the retailing rather than manufacturing of womenswear the thesis takes into account that the balance of power between clothing manufacturers and retailers has shifted - today the creative, i.e. design, capital within the fashion industry is in the hands of the retailers who dominate and direct fashion at the high street level.

Broadly following production of culture and symbolic interactionist approaches to the culture industries, the thesis opens with an exploration of collective activity as an important dimension of the production of cultural artefacts. Attention is drawn to production of culture proponents' models of selection processes in culture industries, where cultural artefacts enter a set of gatekeeping or filtering stages that determine their acceptance or rejection. However, while these selection models provide significant insights into some of the dynamics that govern the production of culture, the non-conflictual, unidirectional portrayal of selection processes and the exclusion of consumption-related issues not only leaves important areas of investigation untouched, but distorts the actual working practices of culture industry practitioners. The aim of this thesis, therefore, is to open up the 'black box' of fashion production and provide an alternative model of selection processes through an empirical investigation of how fashion forecasting and garment selection are executed. Based on data from semi-structured interviews with designers, buyers and merchandisers it is suggested that selection processes in high street womenswear retailers can be divided into two distinct levels - forecasting and garment selection. Each level is characterised by (a) the occupational group that dominates it and (b) by a specific interplay between teamwork and conflict. It is proposed that the construction of a shared customer image among key players in the industry acts as an ordering principle which not only helps practitioners overcome differences in occupational outlooks, but which also directs their efforts towards the creation of garments that they feel will gratify their customers' taste. Practitioners' perceived customer image, therefore, plays a significant role in fashion industry forecasting and selection processes, because it influences the fashion production cycle at all levels.

In addition, the thesis draws attention to variations in retailers' organisational set-up and shows how they influence the balance of power between key players and the competitive strategies companies adopt to survive in the market. These observations are grounded in a discussion of the transformation of Western economies from Fordism to post-Fordism, while also drawing on arguments regarding the co-existence and differential development of diverse fashion systems within the UK clothing industry since the mid-nineteenth century.

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## Introduction

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Fashion and the iconic figures of star designers and top models are constantly in the centre of public interest and enjoy a considerable amount of media coverage. However, it is only fairly recently that fashion has come to obtain greater academic interest which is reflected in the growing number of new publications in the field. (see for example the Fashion & Textiles section at [www.bergpublishers.com](http://www.bergpublishers.com)).

Traditionally, fashion has been associated almost exclusively with changes in female dress (Craik, 1994: 14) and as a consequence has been marginalised from 'serious' academic study and been relegated into the realm of the superficial, peripheral, trivial and irrational or, at best, been regarded purely as an aesthetic expression. Indeed, for a long time the study of fashion and clothing was a branch of art history (Wilson; 1985: 48), focusing primarily on aesthetic aspects of fashion and the influence of individual designers and fashion instigators.

However, fashion can be studied from many different angles. In the traditional sociological<sup>1</sup> and social anthropological<sup>2</sup> literature on fashion, its cultural and social aspects, such as its consumption in relation to identity, class/status and lifestyle issues as well as its role in sustaining or challenging the existing social order are emphasised. Simmel (1957), for example, sees fashion as a means of reinforcing class distinctions in a stratified society. He argues that fashion fosters differentiation, competition and stratification between individuals and classes while at the same time expressing uniformity, conformity and belongingness.

Fashion is often seen as a form of communication - a way of symbolically mediating relationships to and roles in our socio-cultural environment. The consumption of clothing is an intrinsically social activity, it is part of one's socially learned way of life and an important medium through which we communicate aspects of our social identity. By drawing attention to fashion as a form of communication we establish it as a cultural phenomena, because 'culture may itself be understood as signifying system, as the ways in which a society's experiences, values and beliefs are communicated through practices, artefacts and institutions' (Barnard, 1996: 26).

Fashion is understood as transcending the realm of personal taste and instead becomes the expression of the 'epoch's soul' or *Zeitgeist* (Wilson; 1985: 47) - the visible manifestation of the social relationships and cultural values of the time. Yet, by concentrating on the cultural aspects of fashion, fashion is treated as though it simply exists - *quasi* independently of an industry. While fashion, if seen as a purely

abstract notion, may be said to be a reflection of the current cultural mood and tastes, it is not fashion in the abstract that we wear, but concrete garments. These garments are designed, manufactured, introduced into the public realm and consumed (or not). This means that someone, or rather a collective of people, has to decide what colour, fabric and shape they are. While these decisions are culturally mediated in that they take developments in the fashion world, the wider cultural landscape and perceptions of consumers' tastes into account, they also include economic considerations since clothing, in an industrial context, is produced for profit making. When fashion is purely seen as an expression of *Zeitgeist* all economic decisions that have formed the garments during the production process are negated and become inconsequential.

On the other hand, economically informed debates of fashion tend to primarily look at the production and distribution of fashion in relation to profit margins, response time, supply and demand, i.e. the manufacturing, distribution, ordering and selling of goods in a competitive consumer market<sup>3</sup>. This approach to fashion is likewise flawed, because it neither considers the impact of the culture of production on the shape and content of garments nor the effect of the specific characteristics of cultural artefacts and their patterns of consumption on the production processes.

The tendency in academic debates to separate 'fashion as a cultural phenomena' from 'fashion as a commercially produced good' is problematic, because in the interplay of these two dimensions fashion becomes shaped into what it is. Rather than seeing fashion only as culture or only as industry we need to investigate the ways in which both sides are interwoven and dependent on each other. Both the detachment of fashion from its origins in production and the disregard of clothing's cultural and social dimensions when treated merely in terms of economic implications reduce our understanding of fashion and the clothing industry. In order to do justice to fashion as a social phenomenon and to understand the organisational structures of the fashion industry one has to integrate consumption and production related issues, because the cultural and economic stand in a co-production relationship: they are mutually constitutive in giving shape and content to fashion. Consequently, it is important to consider fashion in general, and changes in fashion in particular, neither exclusively as expressions of shifts in taste nor as reflections of changing cultural currents, but with regard to their production dimension. For example we have to ask what commercial advantages are gained by fashion producers introducing ever new styles, colours and silhouettes and how commercial considerations influence what kind of garments are produced and how.

Fashion has as much to do with culture as with industry: it involves consumption as well as production (Braham, 1997: 135). Like other culture industries, the fashion industry not only produces cultural artefacts, but 'culture produces an industry' (Negus, 1999: 14). This makes culture and economics amalgams: the realm of one is always influenced by the other. Cultural artefacts, for example, rely for their existence on being produced by an industry or a collective of people which make decisions that are based on cultural and economic reasonings, while any economic decisions always involve cultural ones (Entwistle, 2000: 228).

### **Sociology And The 'Black Box' Of Fashion Production**

Putting the above observations into the context of fashion implies that the concrete manifestations of fashion in clothing owe their existence as much to changing cultural currents as to the complex procedures involved in their production. However, traditional sociological studies of fashion separate culture and industry. They are largely oriented towards issues of representation (Ewing, 1997; Rouse, 1989; Wilson, 1985) and lack in-depth empirical investigations into the structure and organisation of the fashion industry. Thus, traditional sociological studies of fashion can be criticised for falling into the trap of treating the fashion industry as a 'black box', because they pay more attention to the 'invention' and 'consumption' stages than the intermediary processes of production and distribution.

A famous example of this form of omission in the sociological research of fashion is Blumer's (1973) empirical study of Parisian haute couture houses in the late 1950s. For Blumer fashion is an expression of the *Zeitgeist*: it is 'born' as a visual expression of the cultural currents of the time, and 'dies' once it becomes out of tune with the continuously evolving taste. Through interaction, collective taste develops from its initial state of vagueness to more stable, defined and articulate expressions - but once formed, can just as easily disintegrate and be replaced by another collective taste more in tune with the times.

Looking at the 'career of collective taste' Blumer maintains that fashion innovators sketch design proposals which they hope capture the emerging collective taste and give it concrete, objective form. These proposals are then presented to the fashion buyers who select those garments which they believe will be most in accord with the newly emerging taste of the consumers.

Despite these interesting insights into the world of fashion production Blumer's account remains vague and has attracted criticism (e.g. Davis, 1992: 119). While Blumer (1973: 335) identifies 'collective taste' and its connection to *Zeitgeist* as an active force in the fashion selection choices of fashion buyers, he fails in his

attempt to analyse the origin, formation and career of collective tastes. In addition, Blumer neither identifies the stages in the fashion production process nor the key players involved in it.

Regardless of these limitations Blumer draws attention to a number of important and interesting aspects; for example (a) the role of selection in the development of new fashions, (b) the notion of a 'fashion world' which gives rise to the strikingly similar choices of fashion buyers, (c) the 'imagined consumer' for which buyers select products - a process through which production and consumption become linked. It is these three themes, alongside some of the criticisms levied against Blumer's study of fashion, which have sparked the initial idea for this research project.

### **Putting The Industry Back Into The Sociology Of Fashion**

As the above discussion shows culture producing industries play an important part in shaping cultural artefacts and hence excluding them from the study of fashion risks misrepresentation. Following this line of argument the motif of the co-production of fashion by producers and consumers, of culture and industry, runs throughout the thesis. By arguing for the integration of cultural and economic aspects in the study of fashion this thesis seeks to explore the interplay between fashion production and consumption through the empirical study of the social dynamics and working relationships that govern high street womenswear retailers.

Broadly following in the tradition of production of culture and symbolist interactionist research on cultural production the thesis seeks to lift the lid on the 'black box' and look at how fashion for the high street market is produced. Based on data from semi-structured interviews with designers, buyers and merchandisers the thesis aims to provide an alternative model of selection processes at the high street womenswear retailing level and to understand its 'culture of production' by looking at the 'inner workings' of this fashion system. In this endeavour, the research has been guided by the following objectives. To find out:

- ◆ who the key players in the fashion industry are
- ◆ how the selection process is organised
- ◆ what contributions key players make in the selection process, i.e. what their unique 'bundle of tasks' are and if there is evidence of teamwork
- ◆ how the balance of power between key players is structured, i.e. whether conflicts between practitioners arise and, if so, why
- ◆ what guides key players' decision-making processes

These objectives were chosen based on the critical reading of three main sources: (i) Blumer's (1973) study of Parisian fashion houses and some of the criticisms directed against him, (ii) Becker's (1974, 1982) concept of 'art worlds' and (iii) production of culture proponents' work on culture industries and models of cultural selection processes (Crane, 1992; Peterson, 1976; Hirsch, 1972; Ryan and Peterson, 1982). These objectives reflect the eclectic nature in which theory and concepts are used in this thesis. Rather than imposing concepts and theoretical approaches on empirical research in their totality, components from various sources are combined in a way which was felt to be most appropriate for this study. This use of theory follows Blumer's (1969) principle of naturalistic research in which theory is used as 'sensitising concepts'. Thus, existing theories on cultural production and selection processes were used to study concrete empirical examples of fashion production and selection. It was hoped that through the continued comparison of analytical concepts and empirical reality an alternative model of selection processes in womenswear could be derived that presents a close proximity to the empirical instances under investigation.

The theoretical component of the thesis serves a similar function of providing a framework and background to the empirical research. This is done firstly, by positioning this study in the research tradition of production of culture and symbolic interactionist research on cultural production and secondly, by tracing developments in the fashion industry and placing them within the wider economic landscape.

The decision to concentrate the research on fashion industry practitioners and to exclude actual consumers from the study does not contradict the overall argument that cultural artefacts are co-produced by producers and consumers because, guided by Blumer's (1973) claim of the influence of the 'imagined consumer' on buyers' selection choices, it is argued that the interplay of production and consumption can be studied on a micro level, i.e. by looking at the decision-making processes of the key players that are involved in the 'making' of fashion and the extent to which the 'perceived customer image' influences them in their decisions.

It was felt that sociologists' 'black box' attitude towards the study of fashion production, which is reflected in the under-representation of empirical research in this areas, warrants the thesis' emphasis on the production side. This decision was consolidated by practical considerations regarding time and resources, which would have made an in-depth investigation of fashion production and consumption difficult.

## The Fashion Systems

In order to get a sociological feel for the industry it is important to understand its structure, only then can we begin to unravel the inner workings of one particular sector. Fashion systems are similar to art worlds in that both comprise systems of producers, distributors and consumers. Thus, when studying a particular sector of the fashion industry, one needs to understand its relative position in relation to other segments of the fashion system.

Fashion production takes place on many levels and the fashion industry can be vertically and horizontally differentiated into a number of interconnecting segments. Looking at the vertical structures of the industry, there is the couture houses at the top, the high street market in its middle and street-fashion at the bottom. On the horizontal level the fashion industry can be separated into primary, secondary and tertiary markets each with their own fashion cycle (Perna, 1987: 94-8). The primary market is comprised of producers of new materials, i.e. fibres, fabrics, leathers, etc. that are used in the production of apparel and accessories. The secondary market consists of the manufacturers who provide the link between the raw materials and the retailers who, in turn, make up the tertiary market. Depending on the size and organisation of the fashion producing company these markets are either separate or intertwined - Braham (1997: 149), for example, points out that Marks and Spencer is a 'manufacturer without factories' whereas the Italian company Benetton is a 'producer without shops'. In addition, the fashion industry relies heavily on its well-developed supporting systems of marketing and advertising, which are paramount in the distribution of fashion.

While the fashion industry's horizontal systems are directly linked, which implies that changes within one sector of the industry have clear repercussions in the other two - i.e. retailers' demand for greater flexibility puts pressure on the textile industry and manufacturers - the vertical links between the fashion levels is indirect: although they may take inspiration from one another, what happens on the high street does not affect the working practices on the couture and street level. Thus, while retailers' increased emphasis on flexibility may entail the acceleration of the high street fashion cycle and make it easier for companies to follow trends set by top designers, it does not mean that top designers in turn will increase their speed of innovation.

Superimposed on the vertical and horizontal fashion systems are the specific consumer markets they cater for, which can themselves be differentiated into many sub-categories relating to gender, age, income, etc. While all segments of the fashion industry are to a certain extent influenced by their end-consumer market this

influence is most directly felt at the retailing level, because of its closeness to the consumer. As we shall see, this puts retailers in an important intermediary position linking producers and consumers.

### **Why Study High Street Womenswear Retailing?**

There are a number of reasons why high street womenswear retailing is an important area of investigation, four of these reasons will be discussed in the following section – they are (i) the economic importance of the industry, (ii) retailers' dominant position within the clothing supply chain, (iii) the intermediary role of retailing in linking production and consumption and (iv) the lack of empirical research into retailers' working practices.

Clothing retailing, and womenswear in particular, warrants academic attention for its importance within the UK economy. Of the various markets, womenswear is by far the largest sector: purchases of women's outerwear accounted for 42% of the total clothing purchases in 1999, compared with an estimated 26.4% for men's outerwear (Market Assessment, 2000: 15). In addition to the size of its market, another unique feature of the womenswear retailing industry is its high level of concentration. According to figures provided by the Department of Trade and Industry (2002) approximately 75% of the womenswear retailing market is controlled by a relatively small number of large shops and chains. This contrasts sharply with the average concentration of the UK clothing retailing industry in which 45% of the market is controlled by ten companies (Deutsche Bank, 2000: 1).

Over the last two decades the clothing industry has seen a change in the retailer-manufacturer relationship. Clothing retailing has manifested its role as major innovator of change within the industry since the 1980s and has gained dominance over the other sectors in the industry. Changes in the industry have taken place on two levels: design and technology. Clothing design, which has traditionally been in the hands of the manufacturers (Varley, 2001: 4), has to a large extent become appropriated by retailers who have introduced own-label garments or retail brands (Wrigley and Lowe, 2002: 62). This shift of the design function from manufactures to retailers had important implications for the power structure of the industry. Indeed, Lash and Urry (1994: 130) point out that 'the battle for predominance' within the culture industries is decided on the grounds of where the design skills are. In addition, retailers' use of information and computer technology, in particular electronic point of sale (EPOS) systems, has given them greater control over the clothing supply chain and has allowed them to push for greater flexibility from all those companies situated upstream. The literature suggests that these two

developments were largely responsible in the changing power relationship between retailers and manufactures (for example Bowman, 1992: 107; Lowe and Wrigley, 1996:11; Moore and Shearer, 1997: 219).

Retailers' increased influence in the innovation and design of products has transformed them from 'passive distributors' into active agents who influence and intervene in the manufacturing process (Varley, 2001: 7). This has established modern retailing as the mediator between consumption and production. As Foord et al. (1996) point out

... retailers ... not only respond to but also structure consumers' desires and choice and, through their negotiations with producers, they impact not only upon what is produced but also on how it is produced. (Foord et al., 1996: 72)

The distribution level of the industry links producers and consumers – a point emphasised by Alexander (2003: 62) who has revised Griswold's (1994) model of the cultural diamond to draw attention to the role of distributors as intermediaries between artists and consumers.

The connection between clothing retailing and consumption can perhaps best be seen in the advent of lifestyle retailing in the 1980s (Entwistle, 2000: 225). Whereas previously many retailers strived to gain competitive advantages through low-price/high-volume merchandise, they now sought differentiation from their competitors in terms of design, not price. Information technology played a pivotal role in retailers' efforts to 'track customers more closely than ever before and to offer a significantly expanded, but carefully integrated, range of "mass produced individualities"' (du Gay, 1996: 98). It is this market reactivity which has led Murray (1989: 43-4), for example, to suggest that in the UK the shift from Fordist to post-Fordist production systems has not occurred at the manufacturing, but the retailing level, i.e. from 'the manufacture's economies of scale to the retailer's economies of scope' and that retailers have moved away from merely selling products to selling style.

This transformation, as Lash and Urry (1994: 122-23) point out, is not restricted to the clothing industry but occurs in many other industry systems which are becoming more akin to culture industries due to their increasing emphasis on R&D (research and design) over traditional production processes. An important 'side-effect' of retailers' concerns with design and reactivity/flexibility is the acceleration of the fashion cycle which is more dramatically felt in womenswear than in any other clothing sector. Womenswear is the most volatile of all clothing markets

and clearly exhibits 'the basic mechanism of fashion ... in no other industry is the management of fashionability so central to its institutions and structures' (Braham, 1997: 121).

Thus, clothing retailing is the site where fashion production and fashion consumption most clearly intersect, not only because retailers function as mediators between the manufactures and the consumers of fashion, but also because the shopping experience, and by extension the retail outlets in which it takes place, have become sites of economic and cultural activity (Entwistle, 2000: 228). Du Gay (1996) draws attention to the interconnectedness of the economic and cultural in retailing by arguing that:

... retailing is increasingly a hybrid activity; which is to say that what is properly 'economic' and what is properly 'cultural' about retailing are inseparable ... because ... contemporary economic success in retailing is premised upon the production of meaning. ... [and] a struggle for the imagination of the consumer ... (du Gay, 1996: 116)

Studying fashion at the retailing level allows the researcher to investigate how the co-production of fashion by producers and consumers manifests itself in fashion practitioners' working practices. By studying retail-based designers, buyers and merchandisers' decision making at the fashion forecasting and garment selection levels we can gain insights into how these players' intimate knowledge of the industry and consumers' consumption patterns guides them in their work.

The fashion industry is centred on continual changes and hence the development and introduction of new products that people want to buy is axiomatic to its very existence. The role of the fashion designers, buyers and merchandisers within the womenswear retailing industry is to create clothing which consumers in their target markets want to buy. To achieve this, they have to closely work together in a joint effort to capture and adopt fashion trends so that there are suitable for their target customers, while at the same time they are guided and constrained by technological and economical issues which arise at the production side of fashion. In order to create economically successful garments, i.e. garments that sell, fashion practitioners not only have to be in tune with their customers' taste, but they need to understand the dynamics of working within a competitive and uncertain market environment. Designers, buyers and merchandisers of womenswear retailers can thus be seen to occupy a key position between industry and consumer.

Lastly, clothing retailing is still an under researched area of enquiry. Du Gay (1996), for example, relates this to the 'dominant productionist bias' which he believes permeates much of the social scientific discourse and which is reflected in

the greater number of studies on industries 'that *really make* something' (du Gay, 1996: 98, original emphasise). Research into clothing retailing is predominantly concerned with changes in the retailer-supplier relationship (e.g. Fiorito et al. 1998, Foord et al, 1992, 1996, Wrigley Lowe, 2002) and the retailing-consumption interface on the store level (e.g. DeNora and Belcher, 2000; Brewis-Levie and Harris, 2000). An exception to this is Leslie's (2002) investigation of the relationship between gender, retail employment and the clothing commodity chain. However, again it is on the store level and not the production level that retailing workers are being studied. Thus, the lack of research into the production processes on the level of womenswear retailing suggests that the 'black box' approach to the fashion industry extends beyond the realm of sociology and includes other branches of the social sciences.

### **Structure Of Thesis**

This thesis is divided into six chapters, which each highlight different aspects of the interplay between 'production and consumption', 'culture and economy'. The opening chapter sets out the theoretical framework of the thesis by looking at cultural production from a production of culture (e.g. Peterson, 1976; Crane, 1994) and art worlds (Becker, 1974, 1982) perspective. The chapter suggests that one of the strengths of these approaches lies in their recognition that culture producing milieus influence the content and shape of the cultural artefacts they produce. This has implications for both the analysis of culture as well as investigations of culture industries. Cultural analysis, it is argued, needs to take the organisational structures of the culture producing and disseminating industries into account, while investigations into the working practices of culture industries need to draw attention to the existence of 'cultures of production' within industry settings.

The chapter also critically assesses the usefulness of the 'filter-flow' model (Hirsch, 1972), the 'decision-chain' (Ryan and Peterson, 1982) and 'art as collective activity' (Becker, 1974, 1982) in explaining the realities of cultural production. It is argued that the filter-flow and decision-chain approaches to cultural production portray key players' selection processes in a mechanical, unidirectional and non-conflictual manner which fails to grasp the complexities of workers' decision-making processes. Becker's (1974, 1982) notion of 'art as collective activity' is introduced as an alternative, more dynamic approach to cultural production.

From an organisational level of analysis of cultural production in Chapter 1 the focus shifts to a macro level analysis of economic developments and changes in consumption patterns in Chapter 2. Following the alleged shift from Fordism to post-

Fordism (or flexible and reflexive accumulation) the chapter charts transformations in production systems, labour arrangements and interfirm relationships. In addition, the chapter outlines contrasting approaches to consumerism, i.e. demand-led and supply-led theories, and shows how the production-consumption relationship is constituted in each. The chapter provides the framework for placing recent changes within the fashion industry into a broader socio-economic context.

The focus in the third Chapter lies on the developments in the UK clothing manufacturing industry over the last 150 years.<sup>4</sup> Based on the system of provision approach it is suggested that commodity groups, such as clothing, are comprised of a number of subsystems which are defined by their specific production, consumption, distribution and circulation relationships (Fine and Leopold, 1993: 4-5). The chapter suggests that the differential development of the menswear and womenswear manufacturing industries can be explained in terms of their different fashion-level. It is shown that the higher fashion content of womenswear gives rise to greater seasonal fluctuations and demand uncertainties, which have delayed the introduction of factory production in this fashion subsystem. Drawing on the debate in Chapter 2 it is suggested that the 'buyers' market' characteristic of womenswear has largely prevented the adaptation of mass production techniques in this fashion subsystem - even during the 'heydays of Fordism'. Instead, womenswear manufacturing, from the nineteenth century until the present day, has relied to a large extent on more flexible production methods, such as subcontracting.

Chapter 4 provides a discussion of the research design and the methods used to study forecasting and selection processes of womenswear retailers. It is shown how the realities of doing research, in this case problems of gaining access to organisational settings, have influenced and restricted the choice of research tools. Attention is also drawn to some of the problems young academics may encounter when entering a research setting as well as the gender dynamics that bear on the interviewing situation. The chapter further reflects on the evolving nature of the interviewing guide throughout the course of the field work. It is shown how insights gained from pilot interviews have informed the reworking of questions.

In addition, the chapter provides information on the research sample in terms of the ratio between designers, buyers and merchandisers, companies' market position and target customer group. Companies are categorised into design-, buying/design- and buying-led companies according to their organisational type. The chapter concludes with an appraisal of the study's limitations, which predominantly reside within the structure of the sample and the restriction towards one research tool, i.e. semi-structured interviewing.

In Chapters 5 and 6 an analysis of the empirical data is presented: firstly on an organisational level, i.e. in terms of the interplay between sameness and differentiation influencing companies' working practices, and secondly, on a micro level, namely in relation to the division of labour between key players during the fashion forecasting and garment selection stages.

The aim of Chapter 5 is to chart the manifestations of the dualistic tendencies of similarity and differentiation within the working practices of the companies in the sample and the fashion industry overall. The chapter applies some of the insights gained in Chapter 3 regarding the connection between the fashion level of a fashion system and its organisational structure, and asks to what extent womenswear retailers' working practices are influenced by their level of fashionability. Differences and similarities between the three retailer categories, i.e. design-, buying/design- and buying-led ones, are outlined in relation to their (a) fashion forwardness and (b) the characteristics of their target customer group, i.e. age, spending power and fashion-forwardness. It is shown that companies seek to pitch their garment ranges in terms of fashion-level, styling and price to fit their customer groups' clothing consumption patterns. It is suggested that retailers' fashion-level and their perception of their target customers' consumption patterns also influences their choice of inspirational sources.

In addition, the chapter argues that the companies in the sample are torn between the conflicting tendencies to differentiate themselves from the competition, while at the same time gaining a sense of security in the face of the perceived unpredictability of the fashion market by following the examples set by significant others within the world of fashion, for example top designers, prestige personalities, forecasting services and their competitors. The strategies adopted by companies to negotiate these conflicting tendencies are discussed and it is suggested that design-led retailers strive to develop distinction through stylistic uniqueness, while buying/design and buying-led companies seek competitive advantages through the speedy emulation of fashion trends.

While Chapter 5 used the three company categories as basis for analysis, in Chapter 6 designers, buyers and merchandisers' working practices take central stage. By looking at these workers' 'bundles of tasks' (Becker, 1982: 9) and by establishing the division of labour between them, it is suggested that selection processes in the fashion industry take place on two levels, i.e. the fashion forecasting and the garment selection one. While designers are most influential on the fashion forecasting level, buyers are shown to occupy not only the central position in the garment selection stage, but – excluding the managerial level - are generally the most powerful

decision-makers at the high street retailing level. Despite this division of power, the data suggest that teamwork plays an important role throughout all selection stages although a certain amount of conflict between key players does arise. The existence of conflicts is explained through discrepancies in occupational outlooks which are fostered by the division of labour between key players.

The notion of the 'ordering principle' is suggested as an explanatory device of how key players overcome differences in outlooks and coordinate their activity in a joint effort to produce saleable garments. Based on the data, it is argued that key players within a company share a 'target customer image', i.e. a jointly held interpretation of who their customer is, and what she likes. This suggestion is substantiated by revisiting the primary and secondary selection levels. Concrete examples of how colour palettes and storyboards are created, as well as how decisions regarding the narrowing down and modification of sample garments are made, are used as indicators to assess the validity of the shared 'target customer image' as the ordering principle which guides key players' decision making processes at each stage within the selection process. The fact that key players' use their assumptions of what they believe customers like and dislike is seen as testimony to the fact that fashion consumption enters into the realm of its production and influences both its producers and the actual cultural commodities.

## **Summary**

The above discussion has shown that there is a need to integrate consumption and production related issue in the study of fashion, because fashion is mutually constituted by culture and industry and by excluding one of these dimensions from the study of fashion one risks misrepresentation. However, it has been argued that traditional sociological research does just that: it neglects to include fashion's production dimension. Fashion in these studies simply exists - seemingly unconnected to the industry which produces it.

It has been suggested that the site that is ideally suited for the endeavour of investigating the production and consumption interplay is the womenswear retailing industry, because it acts as an intermediary between the producers and the consumers of fashion. Moreover, the lack of research into the working practices that are involved in creating garment ranges at retail level suggests that the 'back box' approach to fashion production extends into other social sciences.

In the following chapter we will take a closer look at the culture-industry interplay as seen through production of culture and symbolic interactionist studies of

cultural production and assess the extent to which the 'culture of production' gives form and content to the cultural landscape.

### Notes

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<sup>1</sup> For example: Simmel (1957), Blumer (1973), Brenninkmeyer (1963), Breward (1995), Davis (1992) and Wilson (1985).

<sup>2</sup> For example: Cordwell and Schwarz (1979), Horn (1981) and Roach and Eichner (1979)

<sup>3</sup> For example: Bohdanowicz (1994), Easey (1995) and Rogers (1983)

<sup>4</sup> Manufacturing was chosen as the site of investigation because, until the 1980s, manufacturers were the dominant partner in the retailer-manufacturer relationship and consequently the historical development of the clothing industry can be better studied from a manufacturing perspective.

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## Chapter 1: Selection Processes In Culture Industries

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The following chapter provides the theoretical framework for the thesis and a literature overview of existing studies on selection processes in culture industries. The chapter opens with a discussion of the basic principles of the production of culture approach (e.g. Peterson, 1976; Crane, 1994). Particular attention is paid to the approach's broad definition of cultural production, which not only refers to the actual manufacturing of goods, but includes the intermediary stages of distribution, marketing and exhibition which link producers and consumers, as well as the consumption of artefacts itself. In addition, production of culture proponents' claims that culture producing milieus influence the artefacts they produce is investigated. The chapter then moves to a discussion of symbolic interactionism's contribution to our understanding of culture. The concepts considered in this connection are those of 'social worlds' (Shibutani, 1955) and 'art worlds' (Becker, 1974, 1982).

The focus of the chapter then moves to a discussion of the dialectical relationship between production and consumption, which draws attention to the idea that production is a continuous processes that extends into the realm of consumption through the choices consumers make. This presupposes the notion of an 'active' consumer and subsequently the chapter turns to a discussion of approaches to consumerism as activity (du Gay 1996; Douglas, 1996).

The chapter then looks at selection processes in culture industries. Attention is focused on the critical assessment of two models of cultural selection: the 'filter-flow' model (Hirsch, 1972) and the 'decision-chain' (Ryan and Peterson, 1982). The main focus in the discussion of Hirsch's model rests on his analysis of the function of gatekeepers within culture producing organisations and his notion of 'raw' cultural materials, while the concept of 'product image' warrants particular attention in Ryan and Peterson's approach to cultural production.

Lastly, the chapter returns to Becker's (1974, 1982) concept of 'art worlds' and his notion of 'art as collective activity'. By looking at the roles of convention, collective activity and the division of labour in art worlds attention is drawn to 'art as a social accomplishment' as opposed to the traditional notion of 'artists as creative geniuses'.

## 1.1 'New' Sociologies Of Culture And The Production Of Culture Perspective

Traditionally, culture has occupied a peripheral position within sociology and was often seen as the 'poor relation of structure' (Archer, 1988: 1, cited in Crane, 1994: 2). This conceptual link between structure and culture has hindered the emergence of culture as an area of research in its own right.<sup>1</sup> Since the early 1970s, however, 'new' sociologies of culture have surfaced and perceptions of culture have undergone significant changes (Crane, 1994: 1).<sup>2</sup>

The 'new' sociologies of culture perceive culture not merely as implicit/unrecorded (i.e. as manifested in a society's values, beliefs, attitudes, norms, etc.) and subordinate to social structure, but as explicit social constructions and products. Crane (1994: 2) refers to these explicit cultural forms as 'recorded culture' and points out that the 'new' sociologies deal with two types of recorded culture: (a) in the form of films, artefacts, print, electronic media, etc.; and (b) within information, entertainment, art, science, technology, etc. Despite its pervasive nature, Crane (1994: 3) points out that recorded culture is still treated as an exogenous variable by mainstream sociology which continues to view science and technology, for example, as objective and autonomous entities that exist independently of social interaction.

One approach to the 'new' sociologies of culture is the production of culture perspective which emerged in the mid-1970s from a diversity of (US) studies. Peterson (1976: 672) applies the term 'production' 'in its generic sense to refer to the processes of creation, manufacture, marketing, distribution, exhibition, inculcation, evaluation and consumption'. Production of culture proponents reject the traditional interpretation of culture, in which culture is seen as the 'prevailing norms, attitudes and beliefs of a given society'. This definition, they argue, does not do justice to the culturally fragmented nature of modern societies. Instead they are interested in the fabrication of concrete expressive symbols of culture which give insights into implicit cultural elements, such as 'norms', 'values' and 'beliefs', and hence to reunite 'recorded' and 'unrecorded' culture (Peterson, 1994: 165). While this shift in the definition of culture resembles the turn from a modernist to postmodernist *Zeitgeist*, Crane (1994: 4-6) points out that there are differences between the postmodernist and culture of production perspective in that the former specifically addresses cultural ambiguity and plurality, whereas the latter 'document[s] the changing conditions under which culture is being created and which presumably contribute to the types of conditions that postmodernists describe' (Crane, 1994: 14).

Production of culture proponents believe that any meaningful analysis of culture in contemporary society has to take the characteristics of the culture-producing and disseminating organisations into account (Crane, 1992: 4). Consequently, studies in the production of culture tradition cover diverse areas of culture production such as the arts, science, religion, the legal system, and so on. Production of culture practitioners have thus moved away from the traditional compartmentalisation of fields of research which, in accentuating the differences between research areas, also emphasised their distinctiveness and the uniqueness of cultural creators,<sup>3</sup> and looked for commonalities between diverse fields of cultural production (Peterson 1976: 669).<sup>4</sup> Some academics (Peterson, 1994: 163; Crane, 1994: 13) have pointed out that culture-producing milieus differ from one another depending on their overall link to society, their specific organisational structures (DiMaggio, 1977) and types of markets (Peterson and Berger, 1975). This is an important observation, because it also allows for structural variations within cultural domains over time (Peterson, 1976: 673; Becker, 1982). The production of culture perspective is therefore a useful tool of analysis in all areas 'where cultural symbols are deliberately formulated within concrete situations bounded by explicit social, political, and economic environments' (Peterson, 1994: 163).

All these criteria have an influence on the content and form of cultural artefacts; changes within a culture-producing milieu will bring about changes in the cultural goods produced. Thus, what makes the production of culture approach particularly valuable is that, instead of analysing the 'intended' meaning of cultural products, it looks at the 'unintended' outcome of collective activity and the 'unintended' features of artefacts. These are seen as the by-product of the particular form of social organisation within which the cultural product has been produced. By insisting that culture and social structure are entwined and mutually constitutive, i.e. production factors influence the shape and content of the cultural artefacts produced, and vice versa, practitioners in the production of culture perspective break with the longstanding debate over the causal links between society and culture. Seen through the production of culture perspective, this debate becomes meaningless and futile because, as Peterson (1994: 164-5) points out, 'the production perspective... views both culture and social structure as emergent and the relationship between them as problematic.'

## **1.2 'Social Worlds' And 'Art Worlds'**

Symbolic interactionists have also provided some interesting contributions to the study of the interrelationship between social/organisational structures and culture.

Shibutani (1955, 1962) and Strauss (1978, 1982, 1984), for example, have developed the concept of 'social worlds', which reflects Dewey's observations of the significance of communication for the existence of society. Dewey defined communication as 'common perspectives and common culture' and argued that shared perspectives and culture emerge through individuals' participation in social group(s). While attitudes and outlooks on life differ between social groups, members of the same group have a shared perspective because they find themselves in similar circumstances.

Even though members of a social group share a common communication channel which entails the use of special discourse, jargon, norms of conduct – in short, a specific *Weltanschauung* – and which fosters group solidarity and the accentuation of differences in relation to non-members, individuals are by no means restricted to only one social group. On the contrary, individuals participate in a variety of social groups and have access to a multitude of communication channels; in fact, each individual occupies a unique combination of social worlds. While these worlds entail different sets of *Weltanschauungen*, and consequently force the individual to lead a segmented life, conflict only arises if the social worlds are related and individuals are thus forced to express their loyalty to one social world over another by embracing its definition of the situation. Conflict in this context is subsequently defined as a clash of perspectives or contrasting interpretations of a situation (Shibutani, 1955: 568).

This fragmentation phenomenon is a characteristic of modern society because communication networks are no longer conterminous with territorial boundaries. The earlier observation of the relationship between communication (channels) and culture showed how culture areas have lost their territorial bases and are now similar to communication channels. Shibutani argues that:

...there is an intuitive recognition of the diversity of perspectives, and we speak meaningfully of people living in different social worlds – the academic world, the world of children, the world of fashion... Each [social world] is an organised outlook, built up by people in their interaction with one another; hence, each communication channel gives rise to a separate world. (Shibutani, 1955: 566)

Social worlds differ in size, stability, composition and territorial distribution as well as their exclusiveness and demands of loyalty from their members. Another, very important, characteristic of social worlds is that they are dynamic, i.e. shared perspectives are ceaselessly being reconstituted, and adapted to changing life conditions and altered social relationships. However, social worlds can be forced out

of existence if their communication channel breaks down. They are therefore cultural areas whose boundaries are set by effective communication and not by some territorial or formal group membership (Shibutani, 1955: 566). Indeed, a 'social world' can be found wherever people are jointly engaged in a task or event of a repetitive nature.<sup>5</sup> These collaborative activities tie them into a set of direct relations which are meaningful to them, provide them with shared definitions of collective activity/identity and enable them to anticipate the behaviour of other members of their social world; thus, the perspective of the larger social group is always built into an individual's actions.

Gilmore (1990: 148) identifies two other concepts, which he believes to be of value for the study of social structure and social organisation from a symbolic interactionist perspective, namely 'art as collective activity' and 'art worlds', which were introduced and developed by Becker (1974, 1976, 1982). Becker (1974: 767) points out that sociologists who study social organisations or systems often neglect to consider the actual people and the concrete collective actions in which they are involved. These sociologists treat organisations and social systems as quasi-isolated entities that exist independently of social actors. Becker (1974:767), however, argues that one cannot speak of 'social structures without reference to the actions of people doing things together which create those structures'. He believes that this criticism can be extended to some studies in the sociology of art. His own writings on art could thus be seen as attempts to highlight the analysis of concrete collective action, and its influence on the organisation and structure of the arts.

Becker (1982: 34-5) defines an 'art world' as 'an established network of co-operative links among participants'. An art world 'consists of all the people whose activities are necessary in the production of the characteristic works which that world, and perhaps others as well, define as art' (Becker, 1982: 34). This definition has several parallels to the production of culture perspective and the social world concept, even though it is seemingly confined to the analysis of art production. Like the production of culture perspective, it emphasises the connection between the organisational structure (the 'necessary activities') and the final shape and content of the products ('characteristic works'). It also possesses affinities to the social world concept, because it touches on the importance of shared meaning, in this case the mutual definition of what does and does not pass as 'art'.

### **1.3 Research Levels Within The Production Of Culture Perspective**

The production of culture perspective includes two alternative modes of analysis – diachronic and synchronic. The former refers to an analysis of patterns of

cultural change over time and looks at a cross-section of cultural forms, whereas the latter involves the comparative study of the production process from creation to consumption. Thus, synchronic analysis addresses issues of originality/innovation and entrepreneurship/patronage. It looks at the influence of technology on the production of artefacts and asks what impact ‘gatekeepers’ – i.e. company executives, art councils, etc. – have on the production and dissemination of culture. In addition, it addresses consumers’ impact on the production processes and considers the context in which cultural products are used and consumed (Peterson, 1976: 676-77).

Studies in the production of culture perspective can also be categorised as micro, organisational/institutional or macro according to the research level employed. Peterson (1994: 182) argues that these distinctions roughly correspond to the methodological/theoretical divisions between social–psychological, institutional and historical/comparative levels of analysis which are widely recognised throughout sociology. Consequently, research techniques and questions vary between levels often causing research categories to drift apart (Peterson, 1994: 181). Although, DiMaggio and Hirsch (1976: 737) share this observation, they stress that the distinctions are heuristic and that the levels are by no means mutually exclusive and, indeed, are often combined in research projects.

DiMaggio and Hirsch (1976) have investigated these three types of research levels in relation to ‘organisational’ approaches in the study of artistic production.<sup>6</sup> They show that macro/societal level investigations, for instance, concentrate on cultural systems and interrelationships among culture-producing institutions. Studies in this research tradition often analyse culture industries in regard to their role in sustaining existing socio-political systems and relationships, including issues relating to class, gender, religion, ethnicity, and so on (Peterson, 1994: 181). Research on the institutional level, on the other hand, looks at specific industries and seeks to examine the ‘processing’ qualities of these industries, i.e. how the structure of an industry shapes the products it produces and how it exerts control over innovation and substance (DiMaggio and Hirsch, 1976: 740-1).

DiMaggio and Hirsch (1976: 737-40) argue that micro level studies are organised around the concepts of ‘career’, ‘role’ and ‘function’. The latter can be divided into four distinct sets of ‘functions’ that have to be present in order to transform ‘a work of art into a commodity’: creation, entrepreneurship/patronage, promotion/distribution, and consumption. While they argue that these ‘functions’ are a prerequisite in the field of art, it can be argued that these functions have to be present in the production of all (cultural) artefacts, including high street fashion.

DiMaggio and Hirsch (1976: 738) point out that creation in the arts can take on various forms; for instance, it can be categorised according to how many social actors are involved, ranging from individualistic to sequential, interactive or corporate creation processes. Examples of the latter form of creation are the assembly of newspapers and film production; music production or publishing serve as examples of interactive creation, whereas advertising photography is a typical sequential creation process. Creation can also be differentiated along several other dimensions, such as the employment relationship (freelance or permanent) or work ideologies (for whom is one creating and does one's audience affect one's self-concept?).

The second 'function' that DiMaggio and Hirsch (1976: 738) address refers to 'entrepreneurship/patronage', which are the sources of support relationships in the creation and distribution of works of art. The term 'patronage' in the present context refers to a support relationship in which someone other than the creators themselves provide the capital necessary for production (DiMaggio and Hirsch, 1976: 738), while 'entrepreneurship' is used when financial support for production, distribution and promotion stems from the same source; this concentration of financial resources raises issues of power and control. DiMaggio and Hirsch's third concept, 'promotion/distribution', is closely related to these issues, because it addresses a further issue of 'gatekeeping'. 'Gatekeepers' are social actors who, amongst other things, exert control over the number and variety of items selected for production and distribution. The last category of 'functions' refers to 'consumption'. Consumption relates to the size and social structure (age, class, gender, lifestyle, etc.) of the audience or consumer group and is closely connected to the organisational structure of a culture industry and, as DiMaggio and Hirsch (1976: 740) stress, is not inherent in specific technologies or art forms.

### **1.3.1 From macro to micro: overcoming differences in research levels**

Symbolic interactionism and research in the production of culture perspective focusing on a micro level of analysis have been criticised for various reasons.<sup>7</sup> Tuchman (1988), for instance, points out that some of these approaches neglect to incorporate questions concerning the influence of political economy and hegemonic control. Thus, while providing detailed empirical data on how cultural institutions operate, most studies in these traditions do not ask how culture industries/institutions serve state, corporate or elite goals (Crane, 1994: 14).<sup>8</sup> In addition, Denzin (1992: 20, cited in Crane, 1994: 2) draws attention to the one-sidedness of the study of cultural meaning and its influence on human behaviour within symbolic interactionism. He

accuses symbolic interactionists of limiting their attention to those groups who occupy relatively powerless positions in contemporary society, thus excluding structural considerations, or macro levels of analysis, from their research agendas.

While one should be aware of these criticisms, Gilmore (1990) points out that the micro/macro distinctions in symbolic interactionist studies can be overcome through the concepts of 'social world' and 'art world'. He argues that the concept of 'social world' allows the analyst to connect structure, culture and individual by integrating levels of behavioural and organisational analysis which bridge the alleged micro/macro gap by providing both individually and collectively meaningful descriptions of social action. This is possible because interactionists employ a 'relational' mechanism of analysis in which they investigate the interaction or exchange between specific individuals, thus explaining individual action and meaning.<sup>9</sup> However, interactionists are able to extend the relational model to macro levels of analysis by using the social world concept, which shows how the individual and the social are interrelated. Gilmore (1990) puts this as follows:

The development of the social world concept offers a solution to this [the micro/macro] problem. It does not rely simply on an ego-centred construct of social structure. Instead the social world provides a framework for an aggregated set of relations, be it a community following some substantive interest or a more formally organised production system that has a shared meaning for participants. This shared meaning guides the joint interests and activities of participants and also provides collective identities. (Gilmore, 1990: 150)

Gilmore also argues that Becker's contributions have enabled symbolic interactionists to apply the 'social world' concept to specific social organisations. Gilmore believes that the analysis of a specific context, i.e. the arts, provides symbolic interactionists with appropriate research tools for investigating an abstract notion such as social structure. While 'art world' studies vary from micro to macro levels of analysis and thus emphasise different levels of social structure, they nonetheless 'all try to integrate levels of behavioural and organisational analysis so as not to have analytically distinct micro and macro perspectives' (Gilmore, 1990: 150).<sup>10</sup> Thus, according to Gilmore (1990: 149), the great strength of an interactionist approach to social structure lies in its ability to integrate micro and macro levels of analysis and to treat social organisation as emergent through and in social interaction – the latter claim can be easily extended to include the production of culture perspective.

## 1.4 The Co-Production Of Cultural Artefacts By Producers And Consumers

One of the strengths of the production of culture perspective and Becker's concept of 'art worlds' is their insistence on 'production' as a continuous or seemingly endless process. Following Peterson's (1976: 672) definition, production includes creation, manufacture, marketing, distribution, exhibition, inculcation, evaluation and consumption. 'Production' does not end with the formal manufacturing and distribution of cultural artefacts, but continues through the choices consumers make and the ways in which they appropriate items into their own context of usage/meaning.

Seen in this light, cultural objects not only undergo continuous evaluation during the creation and manufacturing stages, but also during the marketing, distribution and consumption stages. Here it is important to point out the differences between the production and consumption of utilitarian and cultural goods. Whereas producers, middlemen and consumers of 'material' goods – goods serving utilitarian rather than aesthetic needs – can reach an objective verdict on the quality of a product, for example based on its technical superiority or inferiority in comparison to its competitors, cultural products, or so-called 'non-material' goods, cannot be judged in this way (Hirsch 1972: 641). Clothing, for instance, is fashionable not because of its utilitarian merits, but rather because it captures consumers' imaginations and desires. It is thus not surprising to see that culture industries face high levels of demand uncertainty on their input and output boundaries (Hirsch, 1972: 639).

These observations are of importance to this discussion not only because they show that the production and consumption of cultural artefacts are based on a dialectical relationship, but also because they indicate that selection processes are unceasing and are by no means restricted to a small number of experts. They further illustrate that the consumption of cultural artefacts is an active process and that consumers cannot be perceived as 'cultural dupes', who blindly follow the dictates of the market and the culture industries.<sup>11</sup> On the contrary, consumers become skilful users of culture because the ways in which they interpret artefacts has an impact on their consumption choices (Crane, 1994: 11). Seen in this light, the use of the term 'reception' in describing audiences' or consumers' reaction to or use of cultural artefacts is misleading, because

... 'reception' suggests the end of a communication process; nonetheless, it is an active process of selection, interpretation, and recombination of elements that can be seen as 'auto' production of a symbolic world which is

meaningful for “consumers”. All individuals and collectivities create lifestyles that display their patterning of cultural choices.’ (Peterson, 1994: 183)

### 1.4.1 Consumption as activity

Contemporary theories of consumption (Willis, 1990; Douglas, 1996) provide some useful insights into the active and creative capacities of both individuals and groups in the appropriation of consumer goods for their own ends. These concepts provide room for ‘dislocation’ and human agency and stand in stark contrast to supply-led theories of consumerism (see section 2.2.3) in which ‘consumers simply follow to the letter of the law a script pre-written by capital’ (du Gay, 1996: 81).

By interpreting consumption as an activity we are opening up room for emotions and desires as driving forces in consumption, which in turn evokes the concept of the hedonistic consumer. Hedonism, within the discourse of modern consumption, takes on a new and broader meaning than it had before (Gronow, 1997: 2). While hedonism was traditionally seen as being functional to the existing economic system which relies on qualities such as extravagance and self-indulgence, and was hence an extension to the passive *homo economicus* put forward in supply-led theories of consumerism, hedonism within the modern discourse of consumption goes beyond the idea that consumption is based on utility and instead incorporates notions of consumerism as pleasure. Thus, consumerism becomes transformed into an activity that promises new experiences and the fulfilment of dreams and desires – the actualisation of a lifestyle. This idea is taken up by du Gay (1996: 183) who argues that consumption choices also entail quality of lifestyle choices. He argues that modern consumers seek to ‘maximise their ‘quality of life’... by assembling a lifestyle, or lifestyles, through personalised acts of choice in the market place’ (du Gay, 1996: 77).

An influential proponent of the notion that consumers’ actualise certain lifestyles through their consumption choices is Bourdieu (1984) who has analysed the interrelationship between consumption patterns and consumers’ cultural and economic capital. Based on the argument that people of a similar background and experience share similar tastes, Bourdieu has devised a complex model of (class-based) lifestyles.

While in Bourdieu’s (1994: 445) analysis cultural capital influences consumers’ cultural choices, because in order to appreciate culture they need to possess cultural competence with which to decipher the ‘code’ of a work of art, Douglas (1996: 82-5) does not consider the impact of education on consumers’ choices as such. For her consumption is a form of cultural alignment in which

consumers have to decide where their loyalties lie. She argues that consumers follow a cultural project (Douglas, 1996: 113) and that taste is consequently politicised because consumption behaviour is motivated by cultural hostility (Douglas 1996: 82). She points out that choosing one commodity over another entails a double choice, because it is not only a positive (choosing of) but also a negative (choosing against) one. Developing this argument, Douglas (1996: 112) points out the intrinsic rationality underlying all consumer choices and rejects definitions of consumers as individuals who sovereignly exercise private preferences.<sup>12</sup> Douglas (1996) subsequently proposes that:

... we have to make a radical shift away from thinking about consumption as a manifestation of individual choices. Culture itself is the result of myriads of individual choices, not primarily between commodities but between kinds of relationships. The basic choice that a rational individual has to make is the choice about what kind of society to live in. According to that choice, the rest follows. Artefacts are selected to demonstrate that choice ... they are not neutral ... (cultural) hostility is implicit in their selection. (Douglas, 1996: 81-2)

In this way, Douglas argues that consumers play an active role by creatively expressing their self-identity. Moreover, she interprets consumption as an empowering and liberating activity because it enables individuals not only to act out their affiliation to or rejection of certain social groups, but also to challenge existing social structures and roles (Douglas, 1996). This idea is also taken up by Willis (1990: 11) who refers to the production of new meanings from 'raw cultural commodities' as 'symbolic creativity'. Thus, through the act of consumption individuals transform objects so that they become meaningful parts within the project of their identity formation.

Interpreting consumers and consumerism in this way also changes the definition of the concept of objects because one can only characterise consumption as an activity if one assumes that the cultural commodities used are multi-dimensional. We must therefore depart from the traditional narrow definition of the function of objects. According to du Gay (1996), cultural commodities now

... have 'identity-value' and not simply or primarily 'use-value'. The consumption of goods and services is therefore important not so much for the intrinsic satisfaction it might generate but for the way in which it functions to mark social differences and act as a communicator. Style, status and group identification are aspects of identity-value where people choose to display commodities or engage in different spheres of consumption with a view to expressing their identity as certain sorts of persons. (du Gay, 1996: 82)

Thus, it has been argued that by consuming cultural commodities – for instance, in the form of fashion – individuals are creatively appropriating commodities into their own specific discourses of meaning rather than endlessly reproducing the previously established social order. In this respect, consumption itself is seen as an activity and process (Willis; 1990: 18), while (fashion) consumers are no longer regarded as (fashion) ‘victims’ who passively take cultural commodities at face value. It is this shift in interpretation which necessitates an integrated approach to cultural production in which production and consumption are seen as two constitutive forces symbiotically shaping the content and form of cultural artefacts.

### **1.5 Selection Processes In Culture Industries**

According to Crane (1994: 5), culture industries can be divided into three different domains, which together make up the cultural arena.<sup>13</sup> Each domain is characterised by the distinctive form of its organisational structure, type of audience and distribution level. Crane differentiates between ‘core’ culture industries (e.g. television, film and popular music); ‘peripheral’ culture industries (e.g. publishing, radio and magazines); and ‘urban’ culture (e.g. theatre, parades and fairs). Core and urban cultures are situated at opposite ends of the cultural domain. The former is dominated by conglomerates disseminating their cultural products to a heterogeneous audience on a national and international level, whereas the latter caters for local audiences who are differentiated, for the most part, along class lines (Crane, 1994: 6); events are mainly organised by local cultural organisations that are part of a larger network or art world.

Peripheral culture industries are located between core culture and urban culture industries because their organisational structure is more segmented (Crane, 1992: 64). The key characteristics Crane (1992) attributes to peripheral culture industries closely resemble those found in the high street womenswear retailing industry. These characteristics are: (a) a segmented organisational structure; (b) audiences divided into subgroups according to age and lifestyle; and (c) restriction of distribution to a national level.<sup>14</sup>

The literature also suggests that, due to the very nature of their products, culture industries in general face high levels of demand uncertainties and have therefore adopted organisational structures that are conducive to minimising risk, such as using complex selection processes and strategically placed ‘filter’ stages (e.g. Hirsch, 1972; Crane, 1992). Indeed, a good starting point for any investigation of the organisational structure of culture industries is the examination of existing

explanatory models, such as Hirsch's (1972) 'filter-flow' and Ryan and Peterson's (1982) 'decision-chain' model.

### 1.5.1 The filter-flow model

One famous proponent of the 'gatekeeping' approach is Hirsch's (1972) model of the 'filtering' process, or 'filter-flow' model as it is often referred to in the literature (e.g. Negus, 1992: 45). Hirsch's model highlights some interesting characteristics involved in the process of cultural production by demonstrating that: (1) there has to be a surplus of 'raw material' within the technical level of the production system, i.e. in the form of writers, musicians, and so on; and (2) there are 'a number of strategic checkpoints at which the oversupply is filtered out' (Hirsch, 1972: 649). These checkpoints take the form of gatekeeping systems operating at managerial and institutional level.

Hirsch (1972: 639) maintains that pre-selection is an organisational strategy common to all industries. He draws on Barnett's (1953, cited in Hirsch, 1972: 640) work that shows how goods have to pass through a system of organisations (or gatekeeping systems) during their production and distribution stages. This network of organisations acts as a filter that 'sponsors' or 'blocks' the production of cultural products and consequently decides which select few will reach the consumption stage. One can therefore postulate that this continuous process of selection influences the overall content of (a nation's) culture and, moreover, that the ways in which gatekeepers 'define the tastes of the audience affects the opportunity for new cultural producers to enter the system' (Crane, 1992: 75).

Hirsch (1972: 639) proposes the concept of a 'cultural industry system' as a 'frame of reference in which to trace the filtering of new products and ideas as they flow from producer to consumer and in which to examine relations among organisations'. An industry system (Hirsch, 1972: 642) comprises a single, stable network of interacting components, which include technical, managerial, institutional (mass media) and societal 'levels'. These levels all play a part in the filtering of cultural products and ideas. While Hirsch initially suggests the concept of organisational 'levels' as a tool for the internal analysis of a single large-scale organisation, he also believes it to be useful in an inter-organisational or 'organisation-set' analysis.<sup>15</sup>

Hirsch (1972: 642) argues that cultural industry systems can be divided into two distinct sets of gatekeeping systems: (1) selection and promotion through entrepreneurial organisations, and (2) endorsement by mass-media gatekeepers. Hirsch (1972: 644) further divides the first gatekeeping set, i.e. the production sector

of the industry system, into two subsystems, namely the technical (creative) and managerial one. Hirsch believes this distinction to be a characteristic feature of all cultural industry systems. He maintains that the role of the technical subsystem is to propose 'cultural innovations', whereas the managerial subsystem's task is to select proposals for 'sponsorship'. However, there are exceptions to these divisions in the production sector; for example, some individuals have a specific role of linking the technical and managerial levels. While Hirsch suggests film directors, record 'producers' and publishing acquisition editors as examples of individuals with 'boundary-spanning' functions, we will see in Chapter 6 that fashion buyers can be added to this list. Crane (1992: 70) agrees that organisational gatekeeping is a multistage process in which cultural products face two distinct sets of gatekeeping systems. She argues that the first gatekeeping system involves top management in core and peripheral culture industries, which directly influences the selection of both the cultural content and the artist enlisted in the production of a specific project (Crane, 1992: 67). Top management often base future decisions on the audience's evaluation of cultural producers and products. However, exposing audiences to products based on very similar formulas entails a risk of restricting the diversification of taste – although it does not imply the uniformity of audiences' interpretations of cultural products. In addition, by seeking to reproduce past successes through repeats cultural production can become limited and somewhat standardised, thus excluding a great number of potentially interesting projects and artists.<sup>16</sup> Crane observes that:

... the most typical pattern appears to be that the more expensive the product or the more revenue a relatively inexpensive product can generate, the more control will be exercised by organisational gatekeepers. (Crane, 1992: 69)

Hirsch views the decision-making processes within the first gatekeeping set differently and shows how the 'craft administration of production' (Stinchcombe, 1959 cited in Hirsch, 1972: 644) can account for this interpretational discrepancy. Hirsch points out that the organisational structure of cultural industry systems resembles that of a 'craft administration of production' for two reasons: demand uncertainty and cheap technology/production costs.

Hirsch's observation has numerous implications.<sup>17</sup> The observation of most relevance here is his suggestion that technical personnel are accorded professional status and have been 'delegated the responsibility of producing marketable creations, with little or no interference from the front office beyond the setting of budgetary limits' (Peterson and Berger, 1971, cited in Hirsch, 1972: 644). Thus, even though

the managerial level is implicated in the decision process by ‘delegating’ responsibility to the technical subsystem and setting ‘budgetary’ limits, it is seen in a less powerful and determinative position. The managerial level, in Hirsch’s analysis, has a role in influencing cultural content and selection of talent, but the further discussion will show that the second gatekeeping set, i.e. the institutional gatekeepers, play a more crucial role in the selection processes.

These apparent contradictions between Crane and Hirsch can be explained by examining the characteristics of the particular culture industries under investigation. While both writers agree that culture industries are subjected to demand uncertainties, they do not take the essential differences between core and peripheral cultural industries into account. One significant distinction between these industries lies in their production costs. Peripheral culture industries, such as popular music, low-budget filmmaking and publishing, are characterised by relatively low costs and have consequently adopted strategies for ‘coping’ with demand uncertainties that are suited to the characteristics of their cultural products.

Hirsch (1972: 639) lists three distinct strategies employed at the managerial level of cultural industries to counter demand uncertainty: (1) the deployment of ‘contact’ men to organisational boundaries; (2) overproduction/differential promotion of new items; and (3) co-option of mass media gatekeepers.<sup>18</sup> While he does not make any distinctions between core and peripheral culture industries, it can be argued that the second and third strategies are particularly suited for tackling demand uncertainties in peripheral cultural industries. This can be demonstrated through a brief discussion of ‘overproduction’ in relation to the apparent differences between Crane’s and Hirsch’s analyses of the primary gatekeeping system. Hirsch analyses overproduction in connection with differential promotion of cultural items and argues that it is a proactive strategy employed by culture industries to minimise their dependence on institutional, i.e. mass media, gatekeepers. Hirsch argues that:

... overproduction is a rational organisational response in an environment of low capital investments and demand uncertainty ... Under these conditions it apparently is more efficient to produce more ‘failures’ for each success than to present fewer items and pre-test each on a massive scale to increase media coverage and consumer sales. (Hirsch, 1972: 652)

This description of how the majority of items produced are expected to fail, points to significant differences between peripheral and core culture industries. Core culture industries, such as the film and television industries described by Crane (1992), face far higher production costs, and thus cannot rely on overproduction as a means of diminishing demand uncertainties because overproduction is only

economically feasible when production costs are low. In this respect, Hirsch's (1972: 645) claim that the technical subsystems of the entire culture industry are based along 'craft' lines becomes problematic.

This brings us to the second set of gatekeepers, identified by both Hirsch and Crane as 'institutional' or mass media gatekeepers, for example, radio station DJs or magazine editors. While these people are not directly involved in the production processes, they nonetheless influence the content of the cultural arena because they decide which cultural artefacts will be endorsed and then disseminated, displayed and made available to audiences. Crane addresses this point in more detail and argues that there is a direct correlation between the characteristics of the culture-producing organisation – for example, its size and status – and the likelihood of its products being sponsored by secondary gatekeepers. Crane (1992: 70) states that: 'Works disseminated by small or marginal organisations are unlikely even to be evaluated by the second set of gatekeepers and even more unlikely to be favourably evaluated.'

Hirsch (1972: 648) points out that the importance of endorsement through 'autonomous consumer surrogates' or 'mass-media gatekeepers' varies between culture industries, and is strongest when success is inevitably linked to it. Examples of this are the pop music and book publishing industries, where the nature of their products – the multitude of items available – makes direct large-scale advertising uneconomic and producers therefore have to rely on media publicity to reach their audiences.<sup>19</sup> Core culture industries, however, do not have to rely so heavily on institutional gatekeepers since not only do they have larger advertising budgets but they also have fewer items on which to spend them. Therefore, while peripheral cultural industries produce a surplus of commodities from which institutional gatekeepers select some for media endorsement, core culture industries have to apply a more rigorous process of pre-selection within the first gatekeeping system; this has the effect of making them more independent of the institutional gatekeeping system. However, the sequential nature of gatekeeping influences the production and distribution processes within core and peripheral culture industry systems alike because only those items that have successfully passed through the first gatekeeping system are considered in the second (Crane, 1992: 70). Gilmore (1990: 159) thus claims that 'distributional processes are in no way secondary to production processes in explaining variation in artistic activity'.

Like Crane, Hirsch's 'filter-flow' model operates on the assumption that selection/gatekeeping is sequential, i.e. that only those items which have been favourably evaluated at each of these checkpoints will be available to the

consumer/audience. Thus, at the consumption stage, items are put through yet another checkpoint: economic success. It is only at this final stage that consumers are considered by Hirsch and then only insofar as they provide feedback – in terms of sales figure – to the producers. These sales figures are then used by the gatekeepers at managerial level to decide which items are worthy of imitation; the whole process of cultural production and selection then begins once more.

### **1.5.1.1 Limitations of the filter-flow model**

Hirsch (1972: 640) points out that research and theory on multifaceted organisations are frequently restricted to isolated aspects of pre-selection processes. He maintains that researchers, for example, pay more attention to the ‘invention’ and ‘consumer adoption’ stages, while neglecting the intermediary or ‘through-put’ stages in which organisational gatekeepers sift through the overflow of information/materials. These intermediary stages are often treated as a ‘black box’ and consequently the numerous processes involved in linking an artist with an audience are accorded less significance – or are not considered at all. A famous example of this type of omission is Blumer’s (1973) study of Parisian haute couture houses in the late 1950s. As we have seen in the Introduction, Blumer (1973: 335) identifies ‘collective taste’ and its connection to the *Zeitgeist* as an active force in the fashion selection choices of fashion buyers, but remains rather vague in his attempt to analyse the origin, formation and career of collective tastes. As a result his analysis of fashion prediction and selection processes remains rather ineffective and has often been criticised on these grounds (e.g. Davis, 1992: 119).

However, while Hirsch’s analysis constituted an important contribution at the time to the study of cultural production and the organisational structure of culture industries, it has since been frequently criticised for its mechanical and linear nature. Two aspects that critics have taken issue with, aspects which lie at the very heart of Hirsch’s analysis, are the concepts of ‘raw’ materials and (unidirectional) gatekeeping systems. The problem implicit in the former is the assumption that artistic work is the creation of a single person, a creative genius, who works in isolation. It is precisely because the ‘filter-flow’ model assumes cultural artefacts to be the product of individual effort and not the outcome of collective activity, that it takes neither potential conflicts of interest nor differences in interpretations into account. In this model, products are either selected or rejected, but do not undergo any modifications in themselves. This can be clearly seen in Hirsch’s description of how ‘raw’ materials are processed by (supposedly) disinterested units that

mechanically 'convey' products from artist to audience without interfering with their content or shape.

Another point of criticism is that Hirsch neglects to address the underlying criteria which influence producers of cultural goods in their selection choices. For instance, he does not consider the possibility that producers of cultural goods take consumers' tastes into account. Hirsch (1972: 649) consequently marginalizes consumers, seeing their role in the selection processes merely as 'rank ordering cultural styles and items "preselected" for consideration by role occupants in the managerial and institutional subsystems'. In Hirsch's analysis, consumers only appear at the very end of the selection processes with a minimal influence on what is produced. According to his model, selection decisions only seem to be informed by considerations of what the next level of gatekeepers will approve of. Consumers are not only marginalized, but production and consumption stages become clearly separated. Culture, in this sense, is not thought of as holistic, i.e. as unifying production and consumption processes, but is instead portrayed as consisting of two separate units.

A similar criticism can be levelled at Crane's (1992) discussion of organisational gatekeeping systems. Although she draws attention to the multistage process of organisational gatekeeping that involves two sets of gatekeeping systems, Crane unfortunately restricts her discussion of the first gatekeeping system to only one level, i.e. to managerial decision making.<sup>20</sup> However, 'managerial' selection is only one example of selection processes within culture industries. It is thus more useful to view the selection of cultural artefacts as a multilayered, continuous process involving creative and managerial production personnel as well as consumers and a number of support and distributing systems (e.g. advertising, PR, media, etc.) which all exert some influence on the form and content of cultural artefacts. Therefore, the decision-making process described by Crane is only one stage in a long chain of organisational decisions. Even though she acknowledges the complexity of the selection processes, her analysis, like that of Hirsch, remains one-dimensional.

### **1.5.2 The Decision-Chain Model**

Taking these criticisms into account, it is not surprising that Negus (1992: 45) questions the usefulness of the concept of 'gatekeeping' per se and the assumption 'that cultural items merely arrive at a "gate" where they are either admitted or excluded'. Peterson (1994: 172) argues that although the concept may be appropriate for an analysis of decision-making processes in the arts, it does not do justice to the reality of mass production in culture industries. He points out that decisions are

seldom black or white, rejection or acceptance, but on the contrary involve a lengthy process of product alterations and re-contextualisation. Ryan and Peterson (1982), in their study of the production of country music for instance, have attempted to introduce elements of changeability and conflict into their 'decision-chain' model, which not only emphasises that cultural artefacts are not the work of individual artists, but also allows for modifications of artefacts during the production process. The argument that cultural artefacts are 'fabricated' within specific culture producing milieus by members of occupational groups, whose main activity consists of the production of (cultural) symbols, demonstrates their affiliation with the production of culture tradition. Although Ryan and Peterson also revert to a mechanical metaphor ('assembly line'), their account of cultural production is more dynamic. They describe the production process as one in which 'a number of skilled specialists have a part in shaping the final work as it goes through a series of stages which, superficially at least, resemble an assembly line' (Ryan and Peterson, 1982: 11).

Even though Ryan and Peterson address issues of collective activity and the influence of organisational structure on the production and final shape of cultural artefacts, they nonetheless view these processes as following one unified organising principle, the 'product image'. In their view, the product image makes collaboration possible because it provides all individuals involved in the 'assembly' of a product with a shared outlook – a kind of template of cultural artefacts which have successfully negotiated all the links within the decision chain and which set standards for the kinds of new products which are most likely to succeed. The product image therefore is commercially, not aesthetically, oriented. This implies that all individuals in a decision chain manipulate products during their contribution to the production process in such a way that the products will be positively evaluated by the next person along the (assembly) line and thus be successfully passed through all the production stages to eventually reach the consumption stages. As Peterson puts it:

... at each decision point the question is not so much 'What have I got to say?' or even, 'What does the music fan want to hear?' but rather, 'What changes need to be made to get the song accepted by the next node in the decision chain?' (Peterson, 1994: 173)

Thus, Ryan and Peterson (1982: 12) argue that songwriters, 'the first link in the long decision chain', try to predict and take into consideration the preferences of the downstream decision makers in order to ensure that their song will reach the audience. Once again, it is not the intended audience that guides practitioners' selection processes, but predictions made regarding the taste and inclinations of other

actors within the production chain. This view is not only problematic because, like Hirsch's model, it marginalises consumers, but because it uncritically adopts the concepts of 'teamwork' and 'professionalism' from the company executives' perspective, thereby assuming that members of staff subordinate any personal or departmental agendas they might have to the higher purpose of helping to maximise their company's profit (Negus, 1997: 100). Negus (1997: 100) argues that the idea of 'passive' individuals who merely 'filter' products or base their decisions on a unified 'product image' is inaccurate. Instead he proposes that cultural production 'entails actively intervening, mediating and changing [cultural products] as they are being made and put together' (Negus, 1997: 101). This description introduces a more fragmented, though multidimensional, outlook on cultural production, which emphasises individuals' contributions and makes room for potentially disparate views on the content and shape of the final products.

Negus' criticism is echoed by Fine (1992: 1269), who argues that the production of culture perspective needs to be extended to include issues of aesthetic choice. Fine (1992: 1268) turns Becker's famous statement that 'all art is like work' upside down by stating that 'all work is like art'. He thus points to the omnipresence of 'occupational aesthetics', i.e. to the individual's efforts to create objects of aesthetic value that go beyond mere organisational demands. Although aesthetic choices are part of organisational decisions, they cannot be reduced to organisational demands alone, but also need to be appreciated as workers' individual expressions of competence.

Fine argues that organisational, market and consumer constraints influence workers' aesthetic choices and, in turn, affect the quality of products/work produced. Aesthetic choices, according to Fine, are everyday accomplishments involving negotiations between social actors. Fine criticises conventional studies of work and occupations for disregarding the important role of aesthetic choices. While he agrees that the practical creation of (cultural) objects is an intrinsically social phenomenon, he believes that leaving out the creative aspects of production distorts the analysis of workplaces by (a) making them too instrumental or conflict ridden, (b) neglecting to address issues of workers' identity, or (c) overemphasising the potential for alienation.

Fine (1992: 1269) thus seeks to analyse the expressive side of production, or the 'culture of production'. In his study of aesthetic choices and constraints in culinary work, he finds a multitude of examples demonstrating that workers' decisions are not primarily guided by an organisationally approved 'product image', but are based on the workers' own standards of what constitutes good work. Fine's

criticism of the one-dimensional portrayal of social interaction in the 'filter-flow' and 'decision-chain' model can be further developed by referring to Shibutani's (1955) discussion of 'reference groups' and 'social worlds'.<sup>21</sup>

Shibutani argues that reference groups provide a framework, or shared perspective, which enables individuals to assess and make sense of the world and which allows them to co-ordinate their actions into joint activities. The ability to engage in joint activities presupposes individuals' participation in a common culture and communication channel, occupying the same social world. While individuals of the same occupation inhabit the same social world and have joint outlooks and perspectives, it can be suggested that the great variety of occupations within culture industries may give rise to 'subworlds', for example at the technical and managerial level of production, whose occupants may exhibit conflicting outlooks. For this reason, Hirsch's and Ryan and Peterson's unidirectional and conflict-free portrayal of decision-making and selection processes in culture industries have found to be wanting and we must now turn to Becker's (1974, 1982) alternative approach to cultural production.

### **1.5.3 Cultural production as collective activity**

As discussed earlier, Becker (1974, 1982) has modified the symbolic interactionist framework of 'social worlds' for the study of art by creating the concept of 'art worlds', which comprise systems of producers, distributors and consumers. Becker (1982: 1) states that 'the existence of art worlds, as well as the way their existence affects both the production and consumption of art works, suggests a sociological approach to the arts'.

Becker (1982:1) argues that art, like all work, involves the collaboration of a number of individuals and that this collaboration is made possible through shared conventions.<sup>22</sup> He describes conventions as customary agreements by which participants within an art world base their decisions on what is produced, how it is produced and what or who its production involves (Becker, 1982: 29). Shared conventions can be compared to concepts such as 'norms' or 'rules'. They facilitate a smooth and efficient co-ordination of activities among individuals who are used to working together as well as good working relationships between people who have never co-operated with each other before. In addition to co-ordinating working relationships, conventions also contribute to the production of consistent and similar products.

All works of art produced within a specific art world show signs of this collective activity and, consequently, if any component or convention changes, the

work produced changes as well. This does not mean that the product will cease to exist; it merely changes its form or content. In this respect, Becker's analysis is reminiscent of the production of culture perspective discussed earlier.

The emphasis on collective activity also has important implications for how art and artists are perceived. Conventionally, art is considered the unique expression of a single, creative genius – a view supported in Hirsch's analysis. Becker (1982: 13) disagrees and points out that all forms of art involve an extensive division of labour. Freidson (1976) characterises division of labour as

... a process of social interaction in the course of which the participants are continuously engaged in attempting to define, establish, maintain and renew the tasks they perform and the relationships with others which their tasks presuppose. (Freidson, 1976: 311)

In addition, all jobs have distinctive 'bundles of tasks' associated with them.<sup>23</sup> Therefore, in order 'to analyse an art world we look for its characteristic kinds of workers and the bundle of tasks each one does' (Becker, 1982: 9).

However, the division of labour is not absolute and one can therefore expect to find changes over time within the organisation of art worlds. Hughes (1971: 339) points out that individuals' work is an important part of their social identity and hence changes of role content do not occur easily or without conflicts. Similarly, as we shall see in Chapter 6, overlapping areas of responsibility may create tension between workers because groups of workers, as Freidson (1976: 311) points out, seek to collectively control their work. Thus, while social organisations constitute frameworks and set conditions for action – for instance through the promotion of a specific product image – they cannot fully determine action as such.

Becker (1982: 12) further develops his argument concerning the role of the division of labour in art worlds by introducing the concepts of 'core activities' and 'support personnel'. 'Core activities' refer to the contributions of members within an art world that are central and essential in transforming a specific work into a work of art – thus distinguishing it from craft or industrial production. 'Support personnel' refers to supplementary activities that have to be performed, but that neither merit the description 'artistic' nor imply that the person performing them is in any way 'special'. The tasks carried out by support personnel are thus less 'worthy' of admiration because they are not unique and do not require special (artistic) sensibility. The distinction between 'core' and 'support' activities also entails an important observation of the organisational structure of art worlds by emphasising once again that art is not the product of a 'genius loner', but involves networks of people working together to give a product its specific form through the ways in

which their collective activities are organised (Becker, 1982: 35). An art world can thus be defined as ‘an established network of co-operative links among participants’ in which the artist takes a central position (Becker, 1982: 34-5 and 25).

‘Network’ is a concept often associated with studies of the production of culture perspective. According to Kadushi (1976: 769) ‘a network is a set of social objects onto which is mapped a set of relationships or “flows”’. Related to this concept is that of the ‘circle’, which points to the interrelationship that exists between culture producers and consumers (Kadushi, 1976: 770).<sup>24</sup> The kinds of networks and circles one generally expects to find in culture production systems are emergent and interstitial in character, have low visibility and are macro-phenomena (Kadushi, 1976: 70). Vernon (1963, cited in Kadushi, 1976: 772) argues that circles in cultural fields are an expression of economic relations within cultural production that are based on ‘external economy industries’. The expression ‘external economy industries’ describes the relationship of independence that exists between individual producers within a network (and others of the same network) for the supply of speciality goods and labour. An often-cited example of this kind of industry system is the women’s (high) fashion industry (Kadushi, 1976: 772).<sup>25</sup>

Cultural circles more or less correspond to specific cultural domains and Kadushi (1976: 773-80) lists a number of distinct circles, such as ‘intellectual’, ‘scientific’ and ‘movement’ circles. He refers to these three circles as ‘circles of culture production’ because they accord primary status to the production of culture and secondary status to utilitarian concerns. He argues that the status ranking is turned upside down in large-scale or mass cultural production, which he consequently refers to as the ‘utilitarian’ networks of ‘journeyman’ or ‘brokerage’.

As networks can be of considerable size, it is not surprising that the division of labour within networks creates specialist groups of workers with differing interests from others involved in the process of artistic creation. This discrepancy of interests can be related to aesthetic or financial considerations – a point raised by Fine (1992) and Negus (1992, 1997). Thus a difference in standards or outlooks may cause conflicts in production relations, which may in turn influence what is produced and how it is produced. These observations help to explain how conflicts arise in production relations and therefore clearly depart from the earlier models of Hirsch, and Ryan and Peterson.

## **1.6 Implications For The Study Of Formal Organisations**

Although Becker’s concept was developed specifically in relation to the study of art, many of its elements can be adopted for the general study of cultural

production and therefore, by extension, to the study of the fashion industry. However, it needs to be pointed out that art worlds differ from formal organisations in some important respects (Gilmore, 1990: 151). Although both are characterised by well-established systems of division of labour and, correspondingly, a high degree of specialisation, art worlds are 'open systems'. In other words, collaborators are neither specifically linked nor identified before exchange takes place. Art worlds thus do not have an exclusive membership pool that restricts interaction to particularly designated members; they also lack authoritarian relations that regulate social interaction within formal organisations, i.e. in the form of employment relationships. However, some of the most fundamental points raised by symbolic interactionists are related to the construction of meaning. Becker and McCall (1990: 6), for instance, insist that meaning is constructed in and through the process of interaction and that this process is 'the actual stuff of social organisation and social forces (Blumer, 1969). Society ... is the process of symbolic interaction'. This implies that social processes do not simply happen, and do not happen all at once, but occur in steps – each step creating new conditions and possibilities. While this description of social processes allows for contingency, it does not imply random or chaotic behaviour. This observation has important implications for the study of formal organisations. Although relations between workers in formal organisations are to a certain extent regulated through the organisational structure, which is based on principles of hierarchical administration, interaction is never fully determined and cannot be completely controlled or regulated by administrative forces within it.

Nonetheless, Gilmore (1990: 152) argues that, within formal organisations, 'administration' takes the place of 'convention'. Whereas Becker sees conventions as the ordering principle for collective activity in art worlds, Gilmore appoints a similar role to administration which he believes establishes and safeguards hierarchical structures in formal organisations.

## **Summary**

The great strength of all the models introduced in this chapter is that they approach cultural production via the basic assumption that the organisational structures of culture industries influence what is produced. This is an important theoretical stance because it indicates that any meaningful analysis of culture in contemporary society has to take the characteristics of the culture-producing and disseminating organisations into account.

However, it has been suggested that traditional models of selection processes in culture industries, such as the 'filter-flow' and 'decision-chain', fail to do full

justice to the reality of cultural production because their interpretations of the social relationships and interaction between culture producing practitioners are too one-dimensional and non-conflictual. While both Hirsch, and Ryan and Peterson make some important contributions to our understanding of the workings of culture industries, it can be argued that, despite some limitations, the concepts of 'social world' and 'art world' provide a more balanced understanding of cultural production processes. Gilmore (1990: 152) relates this to the fact that these concepts offer 'an alternative approach to social organisation that works with emergent forms of organisation as well as relatively stable patterns of exchange and interaction'. Moreover, unlike the 'filter-flow' and 'decision-chain' models, which marginalise consumers, Becker's (1974, 1982) analysis of art worlds includes systems of producers, distributors and consumers and hence provides a more rounded, or inclusive, approach to the production of culture. By extending the realm of cultural production to include consumerism the spheres of production and consumption are not only brought closer together, but they are treated as mutually constitutive parts in the creation of culture.

While the emphasis in this chapter was on one particular sector of the economy, it is important to the development of the overall argument to place culture industries within the wider economic realm. Culture industries, like any other industry system, do not exist in a vacuum but are subjected to political, social, cultural and economic changes over time – it is in the form of the alleged transformation beyond Fordism that some of those changes are considered in the following chapter.

## Notes

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1. Peterson (1976: 670–1) lists three distinct conceptions of the culture/structure debate. The first sees culture and structure as autonomous systems, whereas the second insists on the dominance of culture over structure. The third ('reflection') model holds that social structure and culture mirror each other. This perspective derives from Benedict (1934), a social anthropologist, who studied a small preliterate social group in which 'one integrated social system [is] overarched by a single cultural system' (Peterson, 1994: 164). The third definition of the structure/culture relationship has also dominated Marxist and Functionalist debates and can be regarded as the (traditionally) domineering conception of culture.

2. These 'new' sociologies of culture have been influenced by numerous other disciplines, such as anthropology, history and political science, as well as literary, cultural, feminist and ethnical studies. Furthermore, they draw on poststructuralist theories and research within the British Cultural Studies group and Science Studies (Crane, 1994: 5).

3. Becker (1982) also questions the commonly held view of the 'creator genius'.

4. This position also helps to overcome the alleged differences in virtues between 'high' and 'low' culture – a distinction common to traditional sociological theories on culture (Crane, 1992: 1). The

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most important proponents of this stance are the members of the Frankfurt School, in particular Adorno, Horkheimer and Marcuse and their 'mass culture critique'.

5. An example of a particular kind of social world is that of the 'production worlds', which arise within a particular product and service market which contains a stable system of audiences, sponsors and consumers (Clarke, 1997: 71).

6. DiMaggio and Hirsch (1976: 736) use the expression 'organisational perspective' when referring to research approaches which examine the influences of organisations, milieus and institutional networks on the production of cultural artefacts. The concept is otherwise analogous to what is generally termed the 'production of culture perspective'.

7. Production of culture studies that employ a micro level of analysis often draw on the research tradition of symbolic interactionism which is the most famous proponent of this form of analysis.

8. Exceptions here are the studies of, for example, DiMaggio (1982, 1992) which combine the production of culture approach with a theoretical perspective based on Bourdieu's work on cultural elites and the institutionalisation of high culture (Crane, 1994: 14).

9. Gilmore (1990: 149) contrasts the 'relational' with the 'attribute' mechanism that instead describes 'the distribution of individual attributes and their correlation with behaviours or attitudes'.

10. The content of the research levels are comparable to those within the production of culture perspective and therefore do not need to be further addressed here.

11. The definition of the 'consumer' has broadened considerably and now encompasses the service sector – patients, pupils, passengers, etc. are also described as consumers today.

12. This view is not shared by du Gay (1996: 77) who describes consumers as both sovereign and omnipresent, thus contradicting Douglas's claims.

13. The term 'culture industry' was originally coined by Adorno and Horkheimer around 1947 and replaced their earlier concept of mass culture. In the context of their work, 'culture industry' refers to the process of industrialisation of mass-produced culture under the imperatives of commercialisation. Viewed from this perspective commodities produced by culture industries are ideologically tainted and ensure the existence and reproduction of contemporary capitalist societies. However, when used by production of culture proponents, the term 'culture industry' does not bear any resemblance to Adorno's and Horkheimer's concept, but merely refers to industry systems producing cultural, as opposed to utilitarian, artefacts.

14. The last criteria does not apply to all companies found in the high street womenswear retailing industry, because some of the larger retailers do have retail outlets and concessions abroad.

15. This term was coined by Evan (1963, in Hirsch, 1972: 643) who draws on Merton's (1957) concept of 'role-set'. Evan uses this concept to refer to an analysis of interactions between an organisation and the network of other organisations in its environment, i.e. those organisations that are located at its input and output boundaries.

16. Indeed, as we will see in Chapter 5, Robinson (1999: 17) warns that clothing retailers' reactivity to consumers' needs and wishes may stifle design innovations and subsequently create product sameness.

17. Hirsch's (1972: 646-7) observation also implies that administration is organised more bureaucratically during periods of stability and that the distribution sector of the cultural industries is more highly bureaucratised due to higher costs that pose more entry barriers within this sector.

18. The use of 'overproduction' in the context of clothing manufacturing will be discussed in Chapter 3.

19. This is the reason for Hirsch's insistence that the cooption of mass media gatekeepers is one of the three coping strategies employed by the culture industries to counter demand uncertainty.

20. Despite these shortcomings in Crane's (1992: 75) analysis she does draw attention to the influence of consumers during the production stages by stating that gatekeepers' definitions of audiences' tastes impacts on their selection of cultural artefacts.

21. Hirsch's model is included in the discussion although it does not explicitly rely on the concept of 'product image' as the ordering principle within selection processes. Nonetheless, Hirsch seems to implicitly work with the idea that people who are involved in the same gatekeeping system hold similar outlooks that facilitate the co-ordinated and smooth 'processing' of cultural products.

21. Becker's use of the concept is problematic since he does not take the larger social processes that shape conventions into account, and consequently fails to investigate the origin of conventions. Rosenblum (1978: 423), for instance, argues that there has to be an 'author' of conventions, and that shared agreements are dependent on more basic features and structures of social life; she highlights

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the dual nature of shared agreements, which arise from, and are shaped by, basic social structural arrangements.

23. This term originally derives from Hughes (1971).

24. Kadushi, however, does not show the full circle, because he limits his analysis to the observation that the producers of cultures are also often culture consumers themselves. This statement can be inverted and applied to consumers of culture who, through the appropriation of artefacts for their own use, become cultural producers.

25. Kadushi (1976: 772) also cites Wall Street, advertising, radio, television, film, publishing, theatre and art as examples of external economy industries.

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## Chapter 2: Fordism And Beyond?

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While the emphasis in Chapter 1 was on theories of cultural production and the 'culture of production' within culture industries, this chapter focuses on the 'industry' within production systems. In order to understand fashion as an industry and to appreciate developments in fashion retailing and manufacturing, the fashion industry has to be located within the broader sphere of economic production. This chapter looks at the broad spectrum of changes, heralded by some analysts as a new logic of production, that has occurred over the last 30 years or so. This immediately draws the debate towards the alleged shift from Fordism to more flexible systems of production.<sup>1</sup> This chapter centres around questions of increased flexibility of production systems by following the 'shift beyond Fordism' debate. The emphasis here is on general economic trends towards greater flexibility, whereas the following chapter focuses on the actual changes within the fashion industry.

The aim of this chapter is to sketch the alleged shift from Fordism to flexible production systems as put forward by a number of theorists, such as Murray (1989), Harvey (1989), Piore and Sabel (1984) and Lash and Urry (1994); the rather loose term 'flexible production systems' is used here to combine a plethora of theories. As Vallas (1999) points out:

... the flexibility debate has if anything grown more difficult in recent years, apace with the proliferation of multiple variants of flexibility theory ... The danger here is that despite its potential contributions, the debate over flexibility may collapse beneath its own weight, ultimately coming to be dismissed as yet another intellectual fashion whose product cycle has simply run its course. (Vallas, 1999: 69)

Although this chapter does not provide a comprehensive overview of recent advances in this debate, it looks at some of the most influential contributions in the field in order to provide insights into more general economic developments and transformations in the industrial landscape as a background for the concrete changes within the fashion industry.

In order to sketch the shift from Fordism to flexible production systems, the key characteristics of Fordism first have to be identified; Fordism, and the various post-Fordist concepts discussed in this chapter, are therefore treated as ideal-types and not as reflections of concrete reality. The strength of using ideal types lies in the accentuation of particular traits of a phenomenon, through which differences in trends and tendencies between objects can be heightened and clarified. The

complexity of reality becomes reduced to its basic characteristics whereas those features which can be considered marginal are downgraded or suppressed – arguably, as Weber points out, many concepts we commonly use are ideal types because the concrete empirical phenomenon to which they refer is too complex to describe otherwise. In this case, by emphasising the typical aspects of Fordism and post-Fordism it becomes easier to assess whether an example taken from concrete reality, such as the fashion industry, exhibits similar tendencies and characteristics to the ideal type construct of the phenomenon under investigation.

Aglietta's (1979) concepts of 'regime of accumulation' and 'mode of regulation' are a good starting point in the endeavour to understand the key characteristics of Fordism as they draw attention to the fact that the notion of 'Fordism' encompasses the interconnected realms of labour, space, state, ideology, consumption and production process (Swyngedouw, 1986, adopted by Harvey, 1989: 177–8). Consequently, any discussion of the Fordist regime of accumulation needs to include a discussion of its corresponding mode of regulation, i.e. the major forces that helped to sustain the system. The role that the 'grand coalition' of corporate, state and labour power played in stabilising Fordism and in balancing mass production and consumption is examined. The chapter then briefly considers some historical impediments to the spread of consumerism before looking at examples of demand- and supply-led theories of consumerism.

This is followed by a short discussion of the 'crisis of Fordism' and some adaptation strategies that have been employed to combat this crisis. Then the transformations beyond Fordism that have taken place over the last decades, and that are heralded by some as evidence for the emergence of a new logic of production, are considered. However, rather than examining the numerous contributions to the 'flexibility debate' in great detail, the major themes of production, consumption, labour processes and interfirm arrangements are singled out, and compared and contrasted with the points of view of some theories in relation to them. Again, the aim is to establish potential broad tendencies of change and the general nature of a new logic of production, rather than to engage in a finely detailed analysis of the particularities of each 'flexibility' theory.

## **2.1 Fordism**

### **2.1.1 The synthesis of regime of accumulation and mode of regulation**

While there is little consensus of what comes after Fordism – or if Fordism has indeed been replaced by a new regime of accumulation – writers generally agree that the long post-war boom, which lasted roughly from 1945–73, marked a distinct

period of capitalism. The 'symbolic initiation date' of Fordism dates back to 1914 when 'Henry Ford introduced his five-dollar, eight-hour day as recompense for workers manning the automated car-assembly line he had established the year before' (Harvey, 1989: 125). However, Fordism only came to maturity as 'a fully-fledged and distinctive regime of accumulation' after 1945 when it extended beyond the United States into Europe and Japan (Harvey, 1989: 129). The regions commonly associated with Fordism are the Midwest (US), the Ruhr-Rhineland, the West Midlands and the Tokyo-Yokohama region. In addition to car manufacturing, the following industries have become symptomatic of Fordism: steel, ship-building, petrochemicals, rubber, consumer electrical goods, construction and transport equipment (Harvey, 1989: 132).

The concept of 'regime of accumulation' and the related notion of 'mode of regulation' derive from the language of the Parisian regulation school (Aglietta, in particular) and are often used in debates about Fordism and its potential successor. Harvey (1989) points out that:

... the virtue of the "regulation school" thinking is that it insists we look at the total package of relations and arrangements that contribute to the stabilization of output growth and aggregate distribution of income and consumption in a particular historical period and place. (Harvey, 1989: 123)

Aglietta uses these concepts to analyse the process of growth and accumulation that was enjoyed by advanced capitalist economies after the Second World War. Generally speaking, 'regime of accumulation' refers to the way in which the accumulation of capital is organised in a specific society to facilitate 'a "long wave" of accumulation' (Gough, 1994: 32) by creating a kind of equilibrium or compatibility between production and consumption that allocates 'the net product between consumption and accumulation' (Harvey, 1989: 121). 'Mode of regulation', on the other hand, can best be understood as a social and political framework, such as the Keynesian welfare state, which facilitates economic growth (i.e. sustains the regime of accumulation) by: (1) co-ordinating and balancing the actions of diverse entities and institutions in one particular direction; and (2) reproducing the particular social relations of production, distribution and exchange. Acknowledging this co-dependency between regime of accumulation and mode of regulation, Harvey (1989) describes the role of the state in sustaining Fordism as follows:

... what is remarkable is the way in which national governments of quite different ideological complexions ... engineered both stable economic growth and rising material living standards through a mix of welfare

statism, Keynesian economic management, and control over wage relations. Fordism depended, evidently, upon nation states taking ... a very special role within the overall system of social regulation. (Harvey, 1989: 135)

However, without support from organised labour, corporate and state interests alone would not have been successful in sustaining a long period of economic growth. Consequently, Harvey (1989: 133–4) speaks of the ‘grand coalition’ of large corporations, the state and organised labour that he believes to be the basis of power in the post-war economic boom.<sup>2</sup> By highlighting the interrelationship between mode of production and a supporting system of reproduction, Harvey’s analysis follows Aglietta’s earlier observations. Similarly, Hirst and Zeitlin (1991: 2–8, in Vallas, 1999: 72) argue that there must be an interrelationship between ‘technological paradigm’ and ‘regulatory or governance apparatus’ in order to balance production and consumption. Indeed, as Jessop (1992: 39) points out, according to flexible specialisation theory, ‘the triumph of Fordism was not technologically predestined, [but] its dominance had much to do with political struggles’. On a more general level, this observation is echoed by Allen (1992: 187) who maintains that institutionalised expectations (e.g. increasing social welfare and consumption levels), combined with an unquestioning belief in economic growth and stable employment, became the ‘social cement’ of the Fordist regime of accumulation. In addition, Murray (1989: 39) observed that the system of protected national markets was paramount in sustaining Fordism, because it allowed the mass producers to recoup their fixed costs at home and compete on the basis of marginal costs on the world market, or through the replication of existing models via foreign investment.

Bringing the argument that Fordism came into being through the synthesis of a particular regime of accumulation with a specific mode of regulation to its logical conclusion, Allen (1992: 187) maintains that national differences between Fordist economies can be explained by variances in the modes of regulation. Moreover, these national differences demonstrate that the concept of Fordism is not an absolute, but rather an ideal-typical construct. Seen in this light, Clarke (1994) argues that:

... the ideal-type of the Fordist regime of accumulation purports to offer a model of a stabilised capitalism, in which the contradictions of the capitalist mode of production are, at least provisionally, overcome in order to secure sustained capital accumulation, social harmony and political tranquillity. (Clarke, 1994: 15)

### 2.1.2 The logic of mass production

Having established the interconnectedness between a regime of accumulation and a mode of regulation, we need to focus on the former in greater detail to establish what distinguishes a Fordist regime of accumulation from other systems. Murray's (1989) characterisation of Fordism provides a good starting point for this endeavour:

These threads – of production and consumption, of the semi-skilled worker and collective bargaining, of a managed national market and centralised organisation – together make up the fabric of Fordism. They have given rise to an economic culture which extends beyond the complex assembly industries, to agriculture, the service industries and parts of the state. It is marked by its commitment to scale and the standardised product ... ; by a competitive strategy based on cost reduction; by authoritarian relations, centralised planning, and a rigid organisation built round exclusive job descriptions. (Murray, 1989: 41)

Following Murray, the discussion of the economic culture of Fordism begins by sketching the system of mass production – which although not actually invented by Ford had nonetheless been pioneered by him – and its link to mass consumption. Since writers generally agree on the characteristics of mass production, Table 1 has been compiled from a variety of sources, namely Murray (1898: 38–9), Allen (1992: 185) and Swyngedouw (in Harvey, 1989: 177).

**Table 1 Characteristics Of Fordist Production System**

<b>Characteristics Of Fordist Production Systems</b>
Economies of scale
Mass production
Uniformity and standardisation of products/components
Long production runs/shelf life of goods
Demand forecasting, just-in-case production, large buffer stocks and inventory
Rigid, specialised technology/machinery (introduction of assembly line)
Deskilling of work, minute division of labour amongst semi/ unskilled (largely full-time) workers
Large, vertically integrated corporations with rigid hierarchical structures
Resource driven

It can be argued that the combination of the features in Table 1 produced a new logic of production that was categorically different from craft production in terms of its organising principles.<sup>3</sup> Thus, while craft production is based on the skill

of the individual worker who produced artefacts from beginning to end, the production process in Fordism is broken up into its component parts: the skilled worker becomes replaced by the machine operator. Murray (1989: 39) maintains that this transformation of the production process undercut production costs significantly, while increasing productivity so significantly that 'this revolutionary production system was to transform sector after sector during the 20th century'.<sup>4</sup>

Arguably the most significant transformations from craft to Fordist production are associated with the deskilling of the workforce, and technological innovations in the form of specialised, purpose-built machinery. Nixon (1997: 188) argues that it is the application of the technological developments to the production of standardised consumer durables that was paramount to the impact of mass production generally. Of course, neither the transformation in the technological structure nor in the composition of the labour force happened in a vacuum. Fordist mass production required the standardisation of components and thrived on volume production and long production runs as only the combination of these factors rendered the introduction of costly machinery profitable and drastically reduced the production costs in comparison to craft produced goods. Clarke (1994: 18) links the introduction of new technology and specialised machinery to the production process to the standardisation of products. He points out that the high costs associated with the installation of new machinery, combined with the fact they these machines were special-purpose ones, made these machines only profitable when used to manufacture standardised components in long production runs - as, for instance, in the context of the car industry.

However, Clarke makes the interesting claim that Ford failed to see that it was the components rather than the products that needed to be standardised, and therefore Ford's emphasis on the standardised product soon proved to be a barrier to the further technological developments of his plants. While Ford regarded the standardisation of goods and the vertical integration of companies - generally seen as a logical response to mass production's high fixed costs in plant and machinery - as important aspects of his achievement, Clarke argues that they introduced a rigidity to Fordism which hindered its development. Clarke (1994) states that:

... vertical integration was necessary in the first instance because of the need to apply Fordist principles to the production of all the component parts of the motor vehicle. However, once these principles had been adopted by component producers, vertical integration presented a barrier to their further development because independent suppliers could achieve further economies of scale and of rationalisation by supplying identical components to a number of manufacturers. (Clarke, 1994: 18)

Another contributory factor to the rigidity of Fordism was that vertically integrated companies, with their large number of employees and activities, needed a large bureaucratic apparatus with a strict hierarchical structure in order to orchestrate their operations. Harvey (1989: 134) shows that scientific management pervaded all aspects of corporate activity (including marketing, product design, pricing strategies, etc.) and became synonymous with 'bureaucratic corporate rationality'. This is echoed by Murray (1989: 40) who observes that departments and divisions, for example, were linked through the centre rather than the base.

A further significant characteristic of Fordist production, in addition to its hierarchical and central organisation, was its reliance on demand forecasts (Lash and Urry, 1994: 74). Planning was carried out by specialists and the entire system was characterised by rigid management structures which stifled individual initiative. Moreover, Lash and Urry (1994) maintain that the sheer size of these operations and the often great distances between the various plants meant that

... supply lines were easily interrupted and it was necessary to have vast buffer stocks (not just-in-time, but just-in-case), so that some assembly plants were effectively 50 per cent warehouses, entailing also vast labour costs for the logging in and out of inventory. (Lash and Urry, 1994: 75)

### **2.1.3 The relationship of mass production and mass consumption**

Of course, a regime of accumulation that relies on mass production can only function if consumer demand is sufficiently high and stable. One of the crucial factors in establishing a balance between production and consumption is wage relation. Jessop (1992), for instance, describes the balanced growth of production and consumption that formed the basis of the Fordist circle of accumulation as follows:

... it is achieved through productivity increases based on economies of scale, rising wages tied to such productivity increases, rising mass demand fuelled by rising wages, increased profits due to increased demand for mass consumer (and complementary) goods, increasing investment in improved capital goods, a further round of productivity growth, and so on.<sup>5</sup> (Jessop, 1992: 26)

Wage relation thus influences the productivity and profit levels of industries as well as a society's overall employment situation. By linking production and consumption, wage relation reproduces the regime of accumulation and moulds it into its distinct shape. According to Harvey (1989), Ford's vision was unique because of his realisation

... that mass production meant mass consumption, a new system of the reproduction of the labour power, a new politics of labour control and management, a new aesthetics and psychology, in short a new kind of rationalized, modernist, and populist democratic society. (Harvey, 1989: 125–6)

A good example of how Ford not only realised the importance of the wage relation but also sought to discipline labour power is the introduction of the \$5 an hour, 8-hour day in his production plant in Dearborn, Michigan in 1914. Following the establishment of the assembly line in 1913, Ford was faced with high absenteeism and labour turnover which proved very disruptive to the production process. With the introduction of a monetary reward scheme Ford hoped to discipline his workforce and ensure uninterrupted capital accumulation, since the \$5 an hour, 8-hour day was only available to those workers who passed his stringent tests of morality and behaviour, both during working hours and in their private lives. Thus, the introduction of Ford's '\$5 an hour, 8-hour day' must be seen as 'an extremely ambitious exercise in social engineering' (Clarke, 1994: 21). Harvey (1989: 126) describes how Ford sought to create a 'new man of mass production' by sending social workers to the homes of his employees in order to install an ethic of 'rational' consumption which was in compliance with corporate needs and expectations. One can thus argue that Ford not only produced cars, but consumers who could go out and buy them.

Indeed, Ford's attempt to create greater stability by disciplining workers succeeded (for a while). According to Clarke (1994: 21) absenteeism fell from 10 percent to 0.5 percent whereas labour turnover fell to 15 percent – a reduction of 400 percent – while, despite pay-rises and shorter working days, productivity rose dramatically. Ford's scheme of high wages and shorter working days provided workers with time and money to consume and thus had a stabilising effect on the system of mass production, while the threat of exclusion from this monetary reward was an effective means of labour regulation (Harvey, 1989: 126).

However, Ford could not continue to pay high wages for long since he came under dual pressure from rising inflation and market competition. Despite the short-lived nature of the '\$5 an hour, 8-hour day', Ford's policy should be seen not only as an important example of attempting to regulate labour power but also as an experiment in social conditioning. At a deeper structural level, Harvey (1989: 126) points out that 'its very existence was a prescient signal of the deep social, psychological, and political problems that Fordism was to pose'.

Of course, although it was significant, Ford's isolated attempt to regulate labour could not sufficiently influence the balance of power between capitalist producer and workers. Clarke (1994: 20) states that the destruction of craft unionism was the first condition of the implementation of Fordist principles of production. This view is supported by Harvey (1989: 133–4) who argues that it was indeed the defeat of the radical working-class movements of the immediate post-war era that prepared the ground for the arrival of the forms of labour control that facilitated the spread of Fordism. These developments tipped the balance of power towards the interests of capitalist corporations and established the ground for 'new class relations conducive to Fordism' (Harvey, 1989: 133).

The introduction of Fordist production techniques changed the nature of work processes significantly. Whereas workers in craft production produced and fitted individual parts of a product, the Fordist workforce was governed by the corporation's drive towards rationality and cost reduction which found expression in the introduction of the assembly line and principles of scientific management. Murray (1989) argues that as a consequence:

... workers' tasks were subject to scientific management or Taylorism, whereby any task was broken down into its component parts, redesigned by work-study specialists on time-and-motion principles, who then instructed manual workers on how the job should be done. (Murray, 1989: 39)

Increasing mechanisation of the production process, standardisation of products and a minute division of labour, which clearly separated production from assembly, went hand in hand with the deskilling of workers. Mass production thus carried the division of labour to its extreme and turned both the goods produced and the very people involved in their production into interchangeable parts of a machine. Rather than succeeding in welding the labour force into an organic whole (Clarke, 1994: 19), mass production techniques created and sustained a dual labour force, which contributed to the inner tensions of Fordism.

It needs to be emphasised that the working conditions just described could not have been implemented and sustained had unions not adopted a collaborative stance in relation to Fordist production methods in return for maintaining some of their rights. Thus, although union power had been curbed to some extent, (US) unions nonetheless wielded considerable influence in the sphere of collective bargaining and continued to influence some social policy issues (Harvey, 1989: 133). However, not all workers benefited from high wages. Large segments of the US workforce were excluded from Fordist wage bargaining, because less stable industry sectors still

experienced low wages and high job insecurity (Harvey, 1989: 137-38). Moreover 'the privileged workforce consisted of predominantly white, male, and highly unionised workers and there was a strong division between this privileged workforce and the "rest"' (Harvey, 1989: 139).

Given these general labour conditions and inequalities experienced under Fordism, it is not surprising that US workers, in both Fordist and non-Fordist sectors of the economy, periodically demonstrated their discontent and dissatisfaction in the form of shop-floor resistance, strikes, high absenteeism and labour turnover (Murray, 1989: 40; Clarke, 1994: 20-1). Thus, Harvey (1989: 134) concludes that workers' collaboration with the Fordist mode of production was more akin to surface adaptation than a thorough change in attitudes. Similarly, Clarke (1994) who emphasises workers' resistance rather than collaboration, maintains that

... the Fordist revolution involved not only a technical revolution but a simultaneous revolution in the social organisation of production. The primary barrier to the Fordist Revolution in production lay not in any technological inflexibility, but in the resistance of workers to their subordination to the whim of the employer. (Clarke, 1994: 19)

This inequality, combined with the general Fordist working conditions caused much discontent that found, for instance, expression in the US counter-cultural movement of the 1960s. The dissatisfaction with such inequalities was fuelled by the very system that produced them in the first place. By creating a dual workforce of high-paid 'Fordist' and low-paid 'non-Fordist' workers the promise of the democratisation of consumption, which formed one of the pillars that sustained Fordist mass production, could only be partially fulfilled. Thus, while the success of mass production is generally associated with the elevation of people's expectations and the creation of ever new consumer needs, large sections of the population were still excluded from the 'joys of mass consumption' (Harvey, 1989: 138).

## **2.2 Theories Of Consumerism**

### **2.2.1 Impediments to the spread of consumerism**

The exclusion of large sections of the population from consumption is by no means a new phenomenon and is not bound to the special conditions found under Fordism. Traditionally, consumerism was the privilege of a social elite which had the material resources to indulge in luxuries, whereas the great majority of people struggled to satisfy their basic needs. However, even when consumption was still restricted to a small social group, its alleged negative influences and corrupting nature occupied politicians, theologians and moralists alike. Gronow (1997: 31)

shows that one can find references concerning consumerism's supposedly negative influences dating back to Roman and Christian moral philosophy. This can be put into context with the discourse on needs and luxuries. According to Gronow (1997: 2), the discourse of need was first raised in moral philosophy in connection with debates on the differences between luxury and needs. Implicit in this distinction is the idea that one can differentiate between 'real' needs and 'artificial' ones, i.e. those satisfied by luxury. Distinguishing between need and luxury presupposes an ideal standard of consumption which can serve as a normative and regulating force. This ideal has moral connotations and refers to the quality and quantity of consumption. If individuals rise above this ideal standard they are either condemned because they have succumbed to the 'seductions' posed by the world of commodities or they are seen as 'victims' of the evils of social competition. The first explanation blames cultural factors, whereas the second holds social interaction responsible. Either way, indulgence in consumption has traditionally been interpreted negatively, and those participating in it have often been suspected of having some moral shortcomings.

While Goldman (1994) claims that people's attitudes towards consumerism only changed with the near universal extension of the wage relation after the Second World War when the 'era of "commodity aesthetic" came into full flower', Campbell (1987) locates the birth of the hedonistic consumer within the eighteenth-century middle classes. He draws parallels to Weber's (1904/5) *Protestant Ethic and the Spirit of Capitalism* by claiming that the intellectual basis of the spirit of modern consumerism stems from the same source as the spirit of capitalism, namely the inner tensions of the puritan ethic of the seventeenth century. Campbell argues that this new type of consumer played an important part in the advent of modern consumer society. He rejects ideas that hedonistic consumers emerged only during late capitalism, once the economic system had already been firmly established. Instead he argues that the spirit of modern hedonism was as important in the birth of capitalism as Weber's ascetic spirit.

However, consumption was not only held in check by the negative moral connotations with which it was often associated, but also through more mundane reasons. One can maintain that there are three basic prerequisites for consumption: firstly, goods for consumption need to be available, secondly, individuals have to possess sufficient material wealth to buy consumer goods and thirdly, people have to have the freedom to consume the goods they want. In feudal society, for example, class demarcations were strongly developed and power relations fixed, i.e. people's social status was largely hereditary and social mobility between the classes was almost non-existent; consequently, the hierarchical nature of society was reflected in,

amongst other things, the way people dressed, which remained relatively static for long periods of time.<sup>6</sup> Indeed, the rise of fashion is commonly associated with social mobility, surmountable differences in social positions and a positive attitude towards changes, whereas egalitarian or rigid social hierarchies both effectively inhibit the development of fashion (Wilson, 1985; Simmel, 1957). Indeed, the rise of fashion in Europe is connected with the breakdown of the feudal system and its rigid social structure, the advent of mercantile capitalism and town life. Wilson (1985: 9) argues that ‘fashion ... originates ... in the early capitalist city ... It was always urban ... became metropolitan and is now cosmopolitan’.

The breakdown of feudalism thus gave rise to a new and prosperous middle class which was striving for improvement, and which embraced and valued changes. The bourgeoisie’s positive attitude towards change and mobility was also mirrored in their dress, which changed with far greater frequency than ever before. However, these shifts of wealth threatened the existing power relations; the aristocracy consequently sought to freeze and restore class distinctions and the old-established inequalities in the distribution of power by holding in check the visible outward displays of the bourgeoisie’s newly acquired wealth by means of sumptuary laws.<sup>7</sup> The function of these laws was to inhibit social change and preserve the status quo. Indeed, Hurlock (1929) points out that sumptuary laws appeared in almost every nation with recognised class distinctions at a stage in their development when wealth was no longer the monopoly of one class. However, people’s desire for self-expression is not easily suppressed.<sup>8</sup> Whereas the bourgeoisie found a way of satisfying this desire by quickly adopting new fashions, the lower classes, rather than illegally copying the styles of the nobility and not being able to follow the swift changes in bourgeois clothing, resorted to the development of their own unique styles – in the form of regional costumes.

Depending on one’s point of view, the spread of consumerism from a privileged elite to the middle classes (and later still to the masses) can be interpreted negatively, i.e. as the breakdown of morality, social order and control, or positively – as a form of democratisation or liberalisation, which ‘produces’ sovereign consumers. Fine and Leopold (1993) argue that:

... the life of the commodity can be traced into two directions, either forward to the buyer and an act of consumption or backward through the seller to the commodity’s origins in production. (Fine and Leopold, 1993: 20)

This interpretative distinction of consumption, and indeed consumers, manifests itself in the two most common schools of thought for exploring consumerism – demand- and supply-led theories – and it is to these theories to which we now briefly turn.

### **2.2.2 Demand-led theories to consumerism**

The trickle-down (vertical) theory of fashion diffusion is a classic example of demand-led explanations for the spread of consumerism. Drawing on a long tradition of linking people's ability to consume certain goods (such as fashionable clothing) with their social standing, trickle-down theory seeks to explain consumption and the spread of consumerism in terms of class differentiation and social emulation. Simmel (1957) and Veblen (1908) are most commonly associated with this theory, although neither of them has ever used this specific term.<sup>9</sup> Their analysis of fashion is related to Western capitalism and the social stratification of society. In their view, fashion becomes a symbol of class, used by an elite to demarcate itself from the lower classes as it allows individuals to express allegiance to their own class, or to one they aspire to, while at the same time demonstrating their difference from others.<sup>10</sup> Standards of taste, Simmel and Veblen argue, are always initiated by a small, prestigious social elite that predominantly belongs to the upper classes (Simmel, 1957: 547) and diffuses vertically down the social scale. According to Veblen (1908):

In modern civilised communities the lines of demarcation between social classes have grown vague and transient, and wherever this happens the norm of reputability imposed by the upper class extends its coercive influence with but slight hindrance down through the social structure to the lowest strata. The result is that the members of each stratum accept as their ideal of decency the scheme of life in vogue in the next higher stratum, and bend their energies to live up to that ideal. (Veblen, 1908: 84)

Seen from this perspective, a certain style only becomes a fashion when followed by a small minority, while the rest of the group is on the way to adopting it – this is the essence of fashion (Lang and Lang; 1961: 337). Consequently, one is only in fashion when the great majority of others are out of fashion. This distinction allows consumers to be noticed and claim prestige for their innovation. A fashion's 'life cycle' is therefore divided into an initiation stage, a short period (signal period) of stability in which it is absorbed by public consciousness and becomes adopted by wider circles of society, followed by its demise (König, 1973: 56). Brenninkmeyer (1963: 52–3) compares fashion to the waves of the sea: as one fashion is adopted by the population at large, a new one is formed, which chases and sometimes overtakes

the first one. The speed of these fashion waves depends on the economic development of a society and its social structures.

Simmel believed that whereas the aristocracy employed sumptuary laws to distinguish itself from other classes, the bourgeoisie rapidly adopted and discarded fashions to stay ahead of their social inferiors. The fashion cycle accelerated towards the end of the nineteenth century. This acceleration was facilitated by an increase of stimuli introduced to consumers – a condition Simmel referred to as ‘neurasthenia of modern life’ – plus changes in technology which resulted in cheaper mass-produced commodities. Consequently, the speeding up of the fashion cycle shortens the life span of a fashion and greatly increases changes in fashion since, as soon as a style reaches the masses, it is discarded and replaced by a new one.

Trickle-down theories are thus based on three assumptions: (1) demand arises spontaneously in the upper classes; (b) the lower classes endeavour to imitate their ‘social superiors’; and (c) the need for differentiation and imitation is sufficiently strong to sustain an endless number of (increasingly accelerating) fashion cycles. ‘In this way, demand both sustains itself and spurs the continuing economic growth of supply’ (Fine and Leopold, 1993: 10). Advocates of this theory argue that the great desire for differentiation and imitation is responsible for the emergence of a market for mass production.<sup>11</sup> This claim, however, runs contrary to commonly held beliefs that product differentiation and market fragmentation are both obstacles to the development of economies of mass production. In addition, Fine and Leopold (1993: 11) argue that it is empirically questionable to suggest that aggregated demand was responsible for dramatic changes on the production side. In particular Fine and Leopold (1993: 75) criticise McKendrick et al. (1982) for suggesting that the Industrial Revolution was linked to a ‘consumer revolution’ or perhaps even caused just as much by changes on the demand (i.e. consumption) side as it was by changes on the supply side. One of the many points they take issue with is McKendrick’s assumption that ‘social emulation ... in itself begets emulative spending’ (Fine and Leopold, 1993: 123). They thus reject McKendrick’s claim that domestic servants’ adaptation of their employers’ fashions served as a ‘major transmission belt’ in the trickling-down and spreading of fashions to the lower echelons of society (Fine and Leopold, 1993: 11). Citing the huge disparity in incomes between servants and their employers, Fine and Leopold vehemently argue that emulative spending on the part of domestic servants is highly improbable and that, given their low incomes, servants could not have contributed to any increase in the demand for fashionable clothes.<sup>12</sup> Instead, they list a number of other reasons to explain why the dress of nineteenth-century domestic servants was increasingly subject to changes in fashion. Such

explanations include 'hand-me-downs' from employers, servants' dress as status symbol (i.e. selected and paid for by employers), clothes as a form of salary-in-kind and inheritance from employers – all of which seem more likely than assumptions based on the notion of emulative spending (Fine and Leopold, 1993: 125–6).<sup>13</sup>

### 2.2.3 Supply-led theories to consumerism

While demand-led approaches to consumerism regard the production system as subordinate to consumer demand, i.e. as satisfying consumers' needs and dreams, supply-led or structural explanations of consumerism take the opposite view. These theories deny consumers any sovereignty and reduce them to passive victims or cultural dupes who are helplessly subjected to the whims of the producers and easily seduced/manipulated by their advertising and marketing techniques.

A common theory amongst cultural critics and economists of the late nineteenth and early–mid twentieth century was to hold modern capitalist production responsible for the creation of 'artificial' needs. While members of the Frankfurt School – most notably Adorno and Horkheimer – and theorists such as Galbraith (1969) distinguished between 'true' and 'artificial' needs, the former placed the origins of artificial needs specifically in the 'culture industry' whereas the latter held the capitalist industry per se responsible.

This line of argument is also expressed by Marcuse (1964). He appropriates Marx's concept of 'false needs' for his analysis and uses it to question two paradigms of orthodox Marxist thought: the revolutionary potential of the proletariat, and the instability of capitalism (Kellner, [www.uta.edu](http://www.uta.edu)). Marcuse argues that mass media, culture and advertising occupy central positions in advanced capitalist societies and are important agents in the creation of false needs. False needs suppress individuals' real needs for creativity, independence and autonomy which cannot be realised in modern capitalism (Strinati 1995: 60). By contrast, false needs can be fulfilled by the system, because it is the very system that creates them. The theory is thus based on the assumption that individuals are unaware not only that their real needs remain unfulfilled but that they have been substituted by artificial ones. We can thus see why Marx believed that false needs are crucial within a system based on inequality because it is the illusory satisfaction they offer that facilitates the continuation and reproduction of the capitalist system (Kellner, [www.uta.edu](http://www.uta.edu)) and integrates the working classes into the existing social order.

In Galbraith's (1969) version of consumerism, consumers take on the role of *homo economicus*. Galbraith seeks to explain the relationship between the increase in production of consumer durables in Western capitalist society and undiminished

consumer demands. Galbraith (1969: 147) suggests that producers are responsible for the creation of consumption needs. He proposes a structural explanation, in which he links production and consumption. In his theory, increasing consumer demands are stimulated artificially by the producers of consumer goods through advertising and the media in order to create markets that can absorb capitalist over-production. Du Gay (1996) summarises this theoretical stance as follows:

Consumers are regarded as fully determined by capital. Consumers' desires and needs are 'created' by producers through the medium of advertising and market research and 'then' satisfied by the goods and services provided by the same producers. (du Gay, 1996: 81)

Thus, supply-led theories to consumerism claim that external agencies, such as advertising and marketing, stimulate the demands of capitalist consumer society. This explanation of why people consume is clearly at odds with the theories of the active consumer discussed in Chapter 1. Moreover, it denies the possibility that consumption satisfies emotions, desires or dreams. Campbell (1987: 48), for instance points out that structural theories to consumerism (mis-)place desires and dreams into the realm of ideological mystification and, as a methodological consequence, one has to deal with the categories of real and artificial needs discussed above.

In addition to criticising supply-led theories on the grounds of constituting consumers as 'passive' and 'manipulated' beings and consumption itself as ideologically tainted, the validity of supply-led theories has also been questioned in relation to their portrayal of the production and consumption relationship. For Miller (1987: 166, cited in du Gay, 1996: 81), for instance, the claim concerning the domination of production over consumption is not theoretically feasible. He argues that if the category of 'production' only possesses meaning in relation to the 'outside' category of 'consumption', then production cannot possibly completely determine consumption. Du Gay puts this as follows:

... consumption both denies the identity of production and provides its condition of possibility at one and the same time. After all, if production saturated consumption there would be no need for the term 'manipulation' in the language of mass culture critique. (du Gay, 1996: 81)

Du Gay further points out that the notion of the 'manipulated consumer', is questionable because it is not the consumers, but the symbolic meanings attached to consumer goods, which are subject to manipulation. Thus, instead of seeing advertising and marketing as mediums of consumer coercion and manipulation, du

Gay (1996: 82) sees them as techniques directed towards the discovery of consumers' aspirations and the delineation of consumers' dreams and desires.

Nonetheless, the role of advertising and marketing as creating, directing and sustaining consumer demand is echoed in much of the writing on Fordism, where it becomes a significant tool employed by Fordist corporations to fuel and channel consumption. This is demonstrated in Nixon's (1997: 190–2) analysis of how advertising played an important role in sustaining aggregate consumer demand, thus consolidating mass consumption and, by extension, Fordism. Nixon (1997: 192) maintains that 'with the expansion of mass production into modern consumer durable sectors ... distinctive forms of mass advertising developed'. When commercial television was initiated in the UK in the mid-1950s, US television advertising techniques had a strong impact on British marketing. Goldman (1994) highlights yet another dimension of the relationship between products and the needs they satisfy – the 'dependence effect' – that has been nurtured by the intervention of modern advertising:

As mass production made craftsmanship a memory for many people, the sign values one consumed could be substituted for absent skills in the articulation of personal identity and social status. When the drive to augment surplus value on the production side of the equation was meshed with the need to extract an identity on the consumption side of the equation, a self-reinforcing growth dynamic was set in motion. (Goldman, 1994)

Consequently, Fordism is often seen as having given birth to a political economy of sign value (Goldman, 1994). Drawing on Hall et al. (1978), Nixon (1997: 191) points out that modern advertising or marketing techniques were not only crucial to the expansion of mass markets for consumer durables, but that this expansion of mass markets was central to the cultural transformation of working-class culture, in particular. These characteristics of Fordism led Harvey (1989) to conclude that:

... postwar Fordism has to be seen, therefore, less as a mere system of mass production and more as a total way of life. Mass production meant standardisation of product as well as mass consumption; and that meant a whole new aesthetic and a commodification of culture. (Harvey, 1989: 135)

Harvey is by no means alone in drawing a connection between the standardisation of mass produced goods and the commodification of culture. Scott (2000: 15), for instance, points out that it was the undifferentiated product offering and 'desemiotized outputs' which, once they were branching out into the sphere of

the cultural industries, led to Adorno and Horkheimer's (1972) criticism of 'eternal sameness'.

The paths of mass consumption, Harvey (1989: 134) argues, were basically defined through the decisions of large corporations, although 'the other two partners in the grand coalition did whatever was necessary to keep effective demand at levels sufficient to absorb the steady growth of capitalist output'. Thus, besides the newly intensified advertising and marketing techniques which sought to channel the British public's consumption patterns, the state played an important role in balancing production and consumption by taking on a number of obligations. Indeed, it was not only in Britain that state and economy were intertwined to ensure that capitalism's tendency towards over-accumulation was held in check. Harvey (1989: 135) argues that similar set-ups could be found in Germany, then ruled by the Christian Democrats, as well as Gaullist France.

One of the practises employed by these governments was the introduction of fiscal and monetary policies with the aim of curbing business cycles and consequently stabilising demand conditions. These were important prerequisites that ensured the profitability of economies requiring large investments in fixed capital, such as the Fordist system of mass production.<sup>14</sup> Harvey (1989) argues that these fiscal and monetary policies:

... were directed towards those areas of public investment – in sectors like transportation, public utilities, etc. – that were vital to the growth of both mass production and mass consumption, and which would also guarantee relatively full employment. (Harvey, 1989: 135)

Murray (1989) emphasises that the state's involvement in the economy was partially responsible for restricting consumers' choices, because

... in the welfare state, the idea of the standard product was given a democratic interpretation as the universal service to meet basic needs ... it effectively forecloses the issue of varied public services and user choice.<sup>15</sup> (Murray, 1989: 42)

Although the welfare state sought to regulate social gaps within consumption by sustaining the system's logic of mass production, eventually the long-run, standardised goods of mass production were unable to satisfy changing consumer demand.

What clearly emerges from this discussion is the fact that consumerism in the context of Fordist theories is largely perceived from a supply-side, i.e. as a consequence of mass production.<sup>16</sup> Paradoxically, as we will see in the following

section, changes in consumer demand and consumption patterns are believed to have contributed to the crisis of Fordism to some extent. Thus, the consumer in Fordist theories undergoes a curious shift from passivity to activity somewhere along the line, which backs the question whether consumers' portrayal as passive and manipulated by Fordist corporations is accurate in the first place.

### 2.3 The Crisis Of Fordism

The grand coalition of labour organisations, corporations and the state could not contain the inherent tensions within Fordism indefinitely and the system consequently became increasingly crisis ridden. Indeed, Harvey (1989: 142) notes that:

... behind all these specific rigidities lay a rather unwieldy and seemingly fixed configuration of political power and reciprocal relations that bound big labour, big capital, and big government into what increasingly appeared as a dysfunctional embrace. (Harvey, 1989: 142)

Piore and Sabel (1984: 166) divide the crisis of Fordism into five interconnected episodes starting with the social unrest of the late 1960s and early 1970s and cumulating in the world-wide economic downturn that started in 1980.<sup>17</sup> Harvey (1989: 140–5), on the other hand, looks at the period from 1965 to 1973 and argues that the final event that sealed the destabilisation of the Fordist regime of accumulation was the sharp recession of 1973.

Harvey (1989: 142) shows that, on the surface, Fordism's internal rigidity 'of long-term and large-scale fixed capital investments in mass-production systems that precluded much flexibility of design and presumed stable growth in invariant consumer markets' limited the system's ability to sufficiently react to and cope with necessary changes. Likewise, he points out that rigidities within the production system were echoed by 'rigidities in labour markets, labour allocation, and in labour contracts'. As a result, attempts to implement changes were often blocked by labour organisations, hence the 1968-72 strike waves in the US and UK, which of course had negative consequences for productivity growth (Harvey, 1989: 142).

Additionally, the period between 1969–73 was marked by the development of a wave of inflation, brought on by the attempts of both the US and the British government to stabilise the economy through relaxed monetary policies, which ended the economic boom. For Harvey (1989: 140) the final event, which sealed the destabilisation of the Fordist regime of accumulation, was the sharp recession and oil crisis of 1973. Indeed, Harvey (1989: 145) argues that the recession and oil crisis 'shook the capitalist world out of the suffocating torpor of "stagflation" (stagnant

output of goods and high inflation of prices)'. For Piore and Sabel (1984: 175–8), the events of 1973, i.e. the Arab oil embargo and Soviet wheat deal, posed a threat to the regulatory systems of the advanced capitalist countries – similar to the protests of marginal workers during the first episode of crisis. However, whereas labour shortages could be overcome relatively easily by tapping into alternative labour markets, fuel and food shortages had a more lasting impact on the economy because Fordism's rigid wage and price structure meant that an increase in price in these two crucial markets sent shock-waves throughout the whole economy. As a consequence, virtually the entire advanced industrial world experienced a rise in inflation.

However, inflation was only one of many factors contributing to the crisis of Fordism. Piore and Sabel (1984: 183) argue that what started as a crisis of supply (in terms of labour, food and fuel shortages) developed into a dual crisis of demand (a deficiency of aggregated demand and demand uncertainty). By the late 1960s, the saturation of the home markets caused increased competition between Fordist economies because, as Piore and Sabel (1984: 184) argue, 'it became more and more difficult to increase economies of mass production through the expansion of domestic markets alone.'<sup>18</sup> Similarly, Harvey (1989: 141) maintains that by the mid-1960s the saturation of the internal markets of Western Europe and Japan, whose post-war recovery had been completed and who subsequently needed new export markets to absorb their surplus output, challenged the US economy's hegemonic position. The need to find new markets, however, not only brought advanced capitalist countries into direct competition for one another's markets, but was extended to include the markets of developing countries. Harvey (1989: 141) further points out that the rigid high-wage labour force of Fordist economies made them increasingly vulnerable to foreign competitors, who could combine the dual advantages of low-wage labour costs and high-tech technology in the fight for market share. Indeed, one could maintain that the crisis of 1973 shifted 'the epicentre of economic development from the developed world to the developing world' (Piore and Sabel, 1984: 177). Thus, despite the efforts of advanced economies to increase their market share, the break-up of their mass markets led to a decrease in their productivity levels and subsequently slower economic growth rates (Piore and Sabel, 1984: 183). In this way, the economic growth rate of the developed countries stood at 11.2 percent from 1971-4, whereas the growth rate of the developing countries more than doubled (to 25.6%) during the same period (Piore and Sabel, 1984: 178).

The second side of the demand crisis relates to uncertainties in 'level and composition of demand in individual markets, and about the price and availability of resource input ... [which combined and] led to the break-up of mass markets for

standardized products' (Piore and Sabel, 1984: 176). The reason why demand uncertainty had a detrimental effect on the Fordist economy, lies in the fact that the Fordist mass production system of long-term investments in specialised machinery strongly relied on demand forecasts, which could only be made with a sufficient degree of accuracy in relatively stable market conditions. Fluctuating prices also made it difficult to plan production well in advance since both operating costs and demand for product types became increasingly uncertain. Piore and Sabel (1984: 176) illustrate these developments by referring to the changes in US demand for fuel-efficient cars, which stood at 9.3 percent in 1967, dramatically rose to 32.4 percent in 1975, and then subsided again to 26.4 percent in 1978.

Demand uncertainty is also associated with shifts in consumption patterns which, as Murray (1989: 42) points out, made 'demand ... more volatile and fragmented'. One expression of dissatisfaction with what was on offer was revealed in the counter-cultural movements of the 1960s. Harvey (1989: 139) argues that these can be seen as a critique of 'the blandness of the quality of life under a regime of standardised mass consumption ... of suburban blandness and downtown monolithic monumentality' with its undifferentiated and unchanging variety of goods. This criticism was directed at both the producers, i.e. the large Fordist corporations, as well as the state apparatus which helped to sustain the system. Vallas (1999: 73), drawing on the writings of various flexible specialisation theorists – just one strand of the post-Fordism debate, shows that changes in consumer taste were one of the major reasons for Fordism's downfall. Referring to Bourdieu (1984), Vallas interprets the flexible specialisation proponents' theoretical standpoint regarding the shifting balance between mass production and consumer demand as follows:

... the ubiquity of mass production has itself stimulated increased consumer demand for quality goods through which consumers can express their distance from the 'vulgar' world of mass taste ... These cultural dynamics, which are not easily squared with the logic of mass production, begin to alter the ground on which production stands. (Vallas, 1999: 73)

In addition, flexible specialisation theorists point out that the delicate balance between mass production and consumption was further threatened by the increasingly widespread availability of information technology. Vallas (1999: 73, drawing on Sorge and Streeck, 1988) argues that these technological advances have lowered the entry barriers for new (neocraft) producers, thus enabling them to exploit niche markets for quality goods and make small-batch production more and more profitable.<sup>19</sup>

The dual changes on the demand side and the crisis on the supply side caused the breakdown of the complex balance between production and consumption, which had been so important in sustaining the Fordist regime of accumulation. Allen (1992) maintains that:

... within the sphere of both production and consumption, the national and international dynamics that had sustained Fordist economic growth were ... beginning to crack, and with them the forms of social regulation that supported the regime. (Allen, 1992: 188)

It is therefore fair to conclude that the 'social cement' of Fordism, i.e. the institutionalised expectations of increased social welfare, economic growth and stable employment, became eroded and the interrelationship of the regime of accumulation and mode of regulation began to break apart (Allen, 1992: 187).

### **2.3.1 Strategies of adaptation**

Given these internal and external upheavals, it is not surprising that Harvey (1989: 145) describes the 1970s and 1980s as a time of economic restructuring, as well as political and social readjustment. Atkinson and Meager (1986: 2–3) identify three key pressures of innovation: (1) consolidation of productivity gains, (2) market volatility/uncertainty, and (3) technological change, which companies had to react to in order to survive within the changing economic environment. In order to remain profitable (or regain profitability) and to ward off foreign competition, Fordist corporations tried to accentuate some of Fordism's distinguishing features, for example, its drive towards rationalisation, mechanisation and intensification of labour control (Harvey, 1989: 145). However, shifting patterns of consumer taste and the widespread availability of more flexible production technologies sometimes forced companies to abandon some of the most rigid features of Fordism, because they were increasingly becoming a liability to companies' profitability (Vallas, 1990: 90). A possible response to innovative pressures was the downsizing and streamlining of companies' operations, which included the breaking up of companies' vertical organisation and a general 'de-layering' of bureaucratic structures (Vallas, 1991: 91). A steady decrease in the level of integration from vertical integration to vertical quasi-integration and disintegration can therefore be observed within firms. Vertical quasi-integration can be characterised as follows:

... a special case, where the principal firm benefits from the advantages of vertical integration (low costs of contracting, just-in-time management, quality control, flexibility of the whole policy) and of vertical disintegration (innovative thrust of the subcontractors, collectivisation of risks on R&D

and fixed assets). (Asheim (1992: 49, drawing on Leborgne and Lipietz, 1988: 274)

Technological advances, such as computer-controlled production methods, have played an important part in this transition and have arguably provided Fordism with a new (short-term?) lease of life by introducing the possibility of *flexible* mass production (Allen, 1992: 189). In fact, technological innovations in the production process, as well as advances in communication and transport, were responsible for the decentralising of the production process, i.e. the breaking-up of vertically integrated structures. This observation is supported by Asheim (1992: 48) who maintains that during the 1960s and 1970s it became 'economically viable [for companies] to split up long and complicated production processes into relatively simple tasks to be performed by unskilled workers in national and international peripheral locations'. The shift towards vertical quasi-integration and disintegration has rendered large companies more flexible and hence better equipped for responding to more diversified markets and consumer demands.<sup>20</sup> This is largely because disintegration has enabled companies to spread some of the risks amongst their network of subcontractors.<sup>21</sup> Harvey (1989: 151–2), drawing on data from the National Economic Development Council, showed that subcontracting had significantly increased: 70 percent of the participating British firms reported an increase in subcontracting between 1982–5.<sup>22</sup>

However, subcontracting, which is arguably the logical conclusion to the disintegration process of vertical organisations, is merely one strategy adopted by companies to improve their competitiveness and master increasing demand uncertainty. Other possible responses include conglomeration, a diversification strategy which entails 'branching-out' of companies' into different markets – either through mergers or the establishment of new subsidiaries, and multinationalisation (Piore and Sabel, 1984: 195).<sup>23</sup> 'Multinationalisation seeks to achieve economies of scale no longer obtainable through the extension of the domestic market by producing a good that can be sold in many national markets simultaneously' (Piore and Sabel 1984: 197–8).

Thus, the hope of keeping productivity levels up by reaching new mass markets, for instance through the multinationalisation strategy, combined with the promise of lower labour costs in developing countries encouraged corporations to move manufacturing plants offshore.<sup>24</sup> Other 'beneficial' factors associated with relocating production plants in developing countries were the absence of powerful labour organisations and the 'apparent docility of the workers' (Piore and Sabel, 1984: 198). Indeed, given the labour unrest which unsettled advanced capitalist

countries in the late 1960s and early 1970s, and the high-wage low-flexibility character of the domestic work force, it is not surprising that many companies sought to stabilise production and productivity by moving production plants offshore. However, Piore and Sabel (1984: 200) point out that discontent and upheavals amongst the workforce were by no means restricted to mature industrial countries, but soon included 'workers new to the assembly line'. The multinationalisation strategy also had a number of other very costly drawbacks (Sabel, 1989: 21).<sup>25</sup> Consequently, merely transferring Fordist mass production techniques offshore was by no means a permanent solution to the crisis of Fordism – rather it should be seen as a temporary 'spatial fix' (Harvey, 1989). Thus, the emergence of 'peripheral Fordism' associated with some of these adaptation strategies, was not sufficient to solve the problems of increasing unemployment and overproduction with which the home economies were faced (Lipietz, 1986, in Harvey, 1989: 155).

## **2.4 Beyond Fordism**

Advanced capitalist countries have undoubtedly experienced a series of changes and adjustments necessitated by changes in national<sup>26</sup> and global markets over the last 30 years. However, to date, there is little agreement as to whether or not the magnitude and nature of these transformations warrant the title of a new epoch (Vallas, 1999: 69) or a new regime of accumulation (Harvey, 1989: 124). Allen (1992: 172) makes a strong point by suggesting that 'economies are always in a state of change, but they are less often in the midst of a period of transformation that leads to a radical shift in the direction of the economy'. Asheim (1992: 46) draws attention to the difficulties inherent in theories of transition caused by the necessity to apply broad definitions to central concepts. This not only results in insufficient historical accuracy but loss of analytical and descriptive potential, since 'the reality the concepts are suppose to grasp becomes [too] heterogeneous'. For Asheim, one way of avoiding these pitfalls is to establish very narrow and precise definitions which encompass time-space specifications. The difficulty with such concepts, however, lies in finding a theoretical and empirical combination confirming that transitions have indeed occurred.<sup>27</sup>

Despite theoretical and methodological problems connected with the theorisation of (economic or other) transformations, Clarke (1994: 13) points out, that among those who believe that the West experienced a period of transformation, 'there is a near universal consensus that [this transformation] derives from the crisis and breakdown of something called "Fordism"'. Not surprisingly, therefore, since the

mid-1980s, economic sociologists have increasingly investigated the restructuring of the economy (Burrows, Gilbert and Pollert; 1994: 1).

**Table 2 Comparison Of Fordist And Flexible Production Systems**

<b>Characteristics of Fordist Production System</b>	<b>Characteristics of Flexible Production System</b>
Economies of scale	Economies of scope
Mass production	Small batch production
Uniformity and standardisation of products/components	Variety of product types
Long production runs/shelf life of goods	Short product cycles/shelf life of goods
Demand forecasting, just-in-case production, large buffer stocks and inventory	Just-in-time production
Rigid, specialised technology/ machinery (introduction of assembly line)	Flexible technology, information technology
Finely detailed division of labour amongst semi/unskilled workers, largely full-time	Flexible labour arrangements, split of workforce into core and periphery
Large, vertically integrated corporations with rigid hierarchical structures	Quasi-vertical integration and plethora of alternative labour systems
Resource driven	Demand driven

Broadly speaking, we can categorise those who believe we have entered a new epoch into neo-Fordists and post-Fordists. According to Allen (1992: 170), ‘the former emphasise the continuities with Fordism, while the latter stress a break with the Fordist era’. However, even amongst post-Fordists, there is little agreement about the exact nature or direction of the economic transformation and consequently a variety of disparate theories have developed. Post-Fordists can be further subdivided into ‘actual’ post-Fordists (Murray, 1989), flexible specialisation theorists (Piore and Sabel, 1984; Hirst and Zeitlin, 1989, 1991), flexible accumulation advocates (Harvey, 1989) or reflexive accumulation theorists (Lash and Urry, 1994) to name but a few.<sup>28</sup> Despite such a multitude of approaches, these theories share some common denominators – most of all, their emphasis on the shift from the rigidity of Fordism to greater flexibility, which is generally believed to be the means of resolving at least some of the tensions thrown up by the crisis of Fordism. Allen (1992: 170) points out that ‘flexibility’ is seen ‘as the hallmark of the new economic

era, overcoming what many take to be the rigidities of an economy organised along Fordist lines'. In fact, the (crisis-ridden) key characteristics of Fordism have seemingly been turned into something almost resembling their opposites, so that scholars often emphasise the stark contrast between Fordism's rigidity and the flexibility of the new epoch, or regime of accumulation:<sup>29</sup>

Flexible accumulation ... is marked by a direct confrontation with the rigidities of Fordism. It rests on flexibility with respect to labour processes, labour markets, products, and patterns of consumption. It is characterised by the emergence of entirely new sectors of production, new ways of providing financial services, new markets, and, above all greatly intensified rates of commercial, technological and organisational innovation. (Harvey, 1989: 147)

Notwithstanding this emphasis on flexibility, Asheim (1992: 47) makes the important point that flexibility is not a new phenomenon. He draws on Sayer's (1989) work that argues for a more differentiated approach to the concept of flexibility. Like Harvey (1989), Sayer looks at concrete instances of increases in flexibility and comes up with four categories – technology, labour, organisation and network – which closely resemble those put forward by Harvey. In order to highlight any transformations, we have to look again at the three core sites of our investigation – production, labour arrangements and consumption – plus, more specifically, the interrelationship between the mode of production and the prevailing forms of consumption.

## **2.5 The Shift From Economies Of Scale To Economies Of Scope**

One of the central themes within the flexibility debate is the way that manufacturing systems changed. For many, the move beyond Fordism can best be seen in the shift from economies of scale (associated with mass production) to economies of scope, that is, in 'the displacement of mass production ... as the dominant technological paradigm of the late twentieth century' (Hirst and Zeitlin, 1991: 36 cited in Vallas, 1999: 68). The importance of technological changes is also addressed by Harvey (1989: 1555) who points out that in today's economy manufacturers' ability to cost-efficiently produce a plethora of goods in small batches means that 'economies of scope have beaten out economies of scale'.

Economies of scope rely both on their ability to manufacture smaller batches of commodities as well as an overall increase in commodity differentiation which allows producers to tap into smaller niche markets.<sup>30</sup> However, viewing the shift from economies of scale to economies of scope in terms of quantity overlooks the

equally important aspect of quality, where customised goods have higher added value. Jessop (1992) maintains that the lines between flexible mass production and craft production may become blurred due to

... bilateral convergence towards high volume diversified quality production from mass production of standardised, price competitive goods and from low volume craft production of customised, quality-competitive goods. (Jessop, 1992: 30)

Flexible specialisation theory focuses on the changes within the production process or, more specifically, on the competing technological paradigms of mass and craft production (Burrows, Gilbert and Pollert, 1994: 3) and the increased competitive opportunities for smaller companies. Asheim (1992) defines the concept of flexible specialisation as

... the opportunities opened for small firms to engage in diversified quality production, where high degrees of flexibility and efficiency in the production ... are attained through [their] new ability to change promptly from one product or process configuration to another, due to the availability ... of relatively cheap re-programmable computerised production equipment. (Asheim, 1992: 50)

Flexible specialisation theorists emphasise the importance of technological advances because they believe that it is through them that small-batch production has become profitable, thus enabling neocraft producers to exploit niche markets for quality goods; this is said to have contributed to contemporary market fragmentation. This lets Burrows, Gilbert and Pollert (1994: 3) to suggest that flexible specialisation is a new form of craft production in which flexible technology plays a pivotal part in achieving diversified product ranges to cater for increasingly fragmented and uncertain consumer markets.

However, the tendency of flexible specialisation theorists to contrast the ideal-typical notion 'flexible specialisation' (i.e. craft production) and 'mass production' makes them neglect the fact that, as previously shown, flexible technology has given mass production a new boost of life, i.e. in the form of *flexible* mass production.<sup>31</sup> Since flexible technology and labour practices are beneficial to both large and small businesses, they can 're-invigorate mass production as well as ... revive the prospects for craft production' (Jessop, 1992: 29). In addition, as mass production is commonly associated with economies of scale, flexible specialisation theorists' emphasis on craft production seems to imply a de-centralisation of economic power. However, Williamson et al. (1987: 432, in Asheim, 1992: 48) make an important point by suggesting that flexible machinery involves high investment

costs that only larger firms can afford. Asheim's claim that cheap flexible machinery is available to smaller companies clashes with Williamson's observation that access to flexible machinery is restricted for financial reasons.<sup>32</sup>

These observations raise doubts about the claim of flexible specialisation theorists that craft production will eventually overcome mass production. Jessop (1992: 29), for instance, argues that economies of scale will continue to be significant in capital-intensive industries. Contrary to the claims of flexible specialisation theorists, technological advances do not necessarily entail a de-concentration of industries because technological innovation has allowed large companies to increase their flexibility by adopting flexible mass production techniques. Small-batch production, which is generally associated with increased flexibility, does not rely on technological developments; although smaller companies may not be able afford the technology, they are nonetheless able to engage in small-batch production. As demonstrated earlier, Atkinson and Meager (1986: 2–3) make an important point by maintaining that technological change is only one of the three key pressures of innovation which companies have to react to in order to survive within the changing economic environment.

In spite of the fact that there are a number of areas of innovation, Harvey (1989: 159) also examines the impact of (information) technology on the economic landscape. He argues that access to accurate, up-to-date information and the ability to instantly analyse data are important assets in today's corporate world. He goes on to point out that advances in these areas have facilitated changes in the organisational structure of companies by facilitating tighter organisation and 'imploding centralisation'. Harvey (1989: 147), in fact, speaks of a 'time-space compression' which sees the diminishing of distances and the decrease in time within the realm of decision-making.<sup>33</sup> He maintains that the importance of information as a commodity has led to the emergence of 'highly specialised business services and consultancies capable of providing up-to-the-minute information on market trends and ... instant data analyses' (Harvey, 1989: 159). Indeed, fashion-forecasting agencies, as will be shown in Chapter 5, are a typical example of such specialised information providers because they cater for an industry that is continuously exposed to demand uncertainties due to relatively fast-changing consumer tastes.

Corporations now find it easier to extend their operations to encompass a multitude of 'satellite firms' in subcontracting and outsourcing relationships, while co-ordinating all activities centrally. A good example of the influence of information technology on production systems is the change from 'just-in-case', i.e. for stock, production to 'just-in-time' (JIT) and 'quick response' (QR) production systems

which enable manufacturers (and retailers) to become increasingly flexible and reactive, both in terms of the number of items produced, as well as in the length of time needed to respond to the placement of new orders. Braham (1997) points out that JIT production

... enables the manufacturer to operate with minimal levels of inventory ... as well as allowing production to be undertaken and completed ... only on the basis of firm orders from the retailers, which themselves are based on actual sales of individual lines. (Braham, 1997: 156)

A prerequisite for the change from 'just-in-case' to 'just-in-time' modes of production was retailers' use of 'electronic point of sale' (EPOS) systems, which allow retailers to keep a close eye on their daily sale's figures. EPOS systems enable retailers to break down their sales' data so that they know not only which item of clothing sells best, but in which colour and size. Retailers can thus gather precise information on their inventory level and can feed this information back to the manufacturers in the form of reorders or cancellations. Granger (1996), for example, shows in her study of the apparel and soft goods industry that retailers and manufacturers increasingly co-ordinate their operations with the aid of computerised programs such as 'Electronic Point of Sale' (EPOS), 'Just in Time' or 'Quick Response' (QR) systems. We can thus see the profound impact of technology on the reshaping of both the manufacturing and retailing sector.

### **2.5.1 Changing interfirm relations and the reorganisation of labour**

Despite the importance of technological advances in facilitating greater flexibility in the production process, there are other factors that have to be taken into consideration, such as transformations of companies' organisational structures and the organisation of the labour process. According to Vallas (1999):

... post-Fordist theory posits the existence of a broad historical shift in the organisation of work: owing to changed economic conditions, firms can no longer rely on Fordist views of jobs and organisations, and must instead invoke new conceptions of labour, new patterns of organisational structure, and new relations with suppliers and subcontractors. (Vallas, 1999: 77)

Following this observation, Vallas lists three broad propositions of change predicted by post-Fordist theorists: (1) at the level of job redesign, which will blur the traditional division between mental and manual labour; (2) at the level of companies' internal structures of decision making, which will be transformed from hierarchical to consensual structures; and (3) at the level of interfirm relations. One

can therefore maintain that flexibility is achieved both on an internal level – that is, in regard to the division of labour within a company – as well as externally, through the division of labour between companies within a network or industrial district (Asheim, 1992: 49).

The latter hypothesis of organisational changes with regard to interfirm relationships is one of the primary concerns of flexible specialisation theorists. In fact, the concept of the industrial district is of great importance in flexible specialisation theory. Traditionally, industrial districts were made up of a number of smaller companies which, although in a competitive relationship to a certain degree, nonetheless balanced competition with co-operation. According to flexible specialisation theory, however, industrial districts assume a number of forms. For example, Brusco (1990: 2, cited in Asheim, 1992: 52) gives varying definitions of the concept, such as ‘a network serving to link firms, or simply as a phenomenon of strong division of labour or, on the contrary, as an informal structure of co-operation and even mutual assistance’. While industrial districts were traditionally made up of smaller companies, flexible specialisation theorists point out that large companies started to remodel their organisational structures on those of industrial networks by deconstructing their vertically integrated structures into vertical quasi-integration, i.e. into a network of subsidiaries and subcontractors.<sup>34</sup>

Subcontracting, as a form of industrial organisation and/or labour arrangement, is by no means new.<sup>35</sup> Harvey (19989: 152) shows how subcontracting was widely used in Japan – even under Fordism. However, subcontracting as a form of organisational restructuring becomes a new twist within flexible specialisation theory. Sabel (1989; paraphrased by Vallas, 1999: 73) uses the term ‘double convergence’ to describe the emergence of new industrial districts through the dual process of (a) disintegration of large vertically integrated companies into subsidiaries and subcontractors, and (b) the conjunction of numerous smaller companies into a federate structure. The concept thus implies that both large and small companies profit from the integration into networks or industrial districts.<sup>36</sup> Asheim (1992) argues that:

... networks can be established by small and medium-sized firms in industrial districts, or be a result of large firms’ externalisation of specific tasks to a network of small, specialised firms through a process of vertical disintegration. (Asheim, 1992: 49)

In this way, large companies gain greater flexibility whereas smaller companies are thought to overcome competitive disadvantages by generating new,

federate forms of organisational structures which help them to pool resources such as training, research and development. Harvey (1989) believes that economic restructuring not only provides new competitive possibilities for smaller companies, but

... in some instances permits older systems of domestic, artisanal, familial (patriarchal), and paternalistic ... labour systems to revive and flourish as centrepieces rather than as appendages of the production system. (Harvey, 1989: 152)

He sums up the notion of co-existing work regimes as follows:

... under conditions of flexible accumulation, it seems as if alternative labour systems can exist side by side within the same space in such a way as to enable capitalist entrepreneurs to choose at will between them ... the same shirt designs can be produced by large-scale factories in India, co-operative production in the 'Third Italy', sweat-shops in New York and London, or family labour systems in Hong Kong. (Harvey, 1989: 187)

However, the claims of flexible specialisation theorists go beyond pointing to the possibilities of co-existing labour systems and the superior competitive positions of smaller companies in the market. Summarising the 'double convergence' argument, Vallas (1999: 73) shows that flexible specialisation assumes the displacement of mass production by craft production as it is believed to be more flexible and hence better suited to the new economic conditions. There are a number of problems associated with this theory. First, as already discussed, technological innovations may be more accessible for larger companies and are indeed believed to have made mass production more flexible. Second, while the decentralisation of production through subcontracting and outsourcing has undoubtedly strengthened the market position of large companies by cutting out some risks associated with costs incurred through demand fluctuations, it would be naïve to assume that smaller companies, positioned in a subcontracting relationship, profit to the same extent. Third, as we have seen, traditional industrial districts consisted of small companies of similar economic strength eager to ensure that no single company dominated the industry structure. However, in industrial districts composed of unequal partners, the balance of power is not distributed equally between the companies and consequently collaborative relationships may not be so easily created or maintained. Asheim (1992: 58) points out that successful industrial districts are characterised by a form of 'productive dualism of competition and co-operation'. The industrial district of the Third Italy – an often-used example – lacks such co-operation precisely because it is organised along vertical lines, i.e. between client companies and their subcontractors.

It may therefore be concluded that, although companies acting as suppliers to larger firms can expect to thrive in line with their 'partners', in times of low demand they may be the first to be affected.<sup>37</sup> Thus, subcontractors risk being used as buffers to compensate for fluctuating demands – a practice widely used in womenswear manufacturing as we shall see in the next chapter. Hirst and Zeitlin's (1991: 4, cited in Vallas, 1999: 73) statement that large companies seek to create collaborative relationships amongst their subsidiaries and subcontractors and that 'the boundaries amongst competing firms begin to blur, as collaborative networks take root in the new industrial districts' thus seems, at best, rather too hopeful.

It is also wrong to assume that the break-up of vertically integrated companies and the rise of various forms of industrial networks entail a general trend towards smaller, less powerful corporations. Harvey (1989: 158), for example, points out that although, in the wake of the break-down of Fordism, there has been an increase both in the number of large-scale mergers and small businesses, well-organised large-scale corporations still have a competitive edge over smaller businesses. Jessop (1992: 30) also insists that large companies will continue to benefit from significant competitive advantages over smaller companies – even if they are organised in industrial districts. Despite the re-emergence and growth of industrial districts with networks of small niche-market firms, Jessop (1992: 38) rejects flexible specialists' claims that craft production will eventually become the dominant form of production, by rightly pointing out that this stance neglects to address 'many crucial technological, product-specific, and financial constraints on the organisation of production'. An important distinction therefore needs to be made between strategic control and the decentralisation of the production process. Whereas the former has become more concentrated 'as the leading firms increasingly become nodal points for the strategic control of capital well beyond their formal boundaries' (Jessop, 1992: 39), the latter has become more heterogeneous, both in terms of the number of companies involved and the move towards internationalisation or globalisation of production. Marshall ([www.uel.ac.uk](http://www.uel.ac.uk)) adds to the debate by criticising Piore and Sabel (1984) for confusion over these two levels of organisational control.

Having so far concentrated on the reorganisation of interfirm relationships, we now turn to companies' internal restructuring of the workforce. Marshall, drawing on Hirst and Zeitlin's (1989) arguments, describes the internal reorganisation process as follows:

The nature of the small firm encourages functional flexibility, as a limited number of employees have to fulfil all tasks, but opposes the traditional route to increasing productivity, via the division of labour. It is argued that

labour and technical stability are now rigidities ... (Marshall, [www.uel.ac.uk](http://www.uel.ac.uk))

Thus, the reliance of Fordist organisations on large workforces and a finely detailed division of labour between workers are now regarded as factors that hinder companies' competitiveness in the new economic environment. It could therefore be argued that hand in hand with the bid to create more flexible production systems through technological advances and changes in the industrial organisation went significant changes in the structure of the labour market and employment relations. In fact, technological and structural changes in the industrial organisation are interconnected to changes in the labour market. Seeking to analyse changes in companies' staffing practices, Atkinson and Meager (1986) have formulated the model of the 'flexible firm' which is used to:

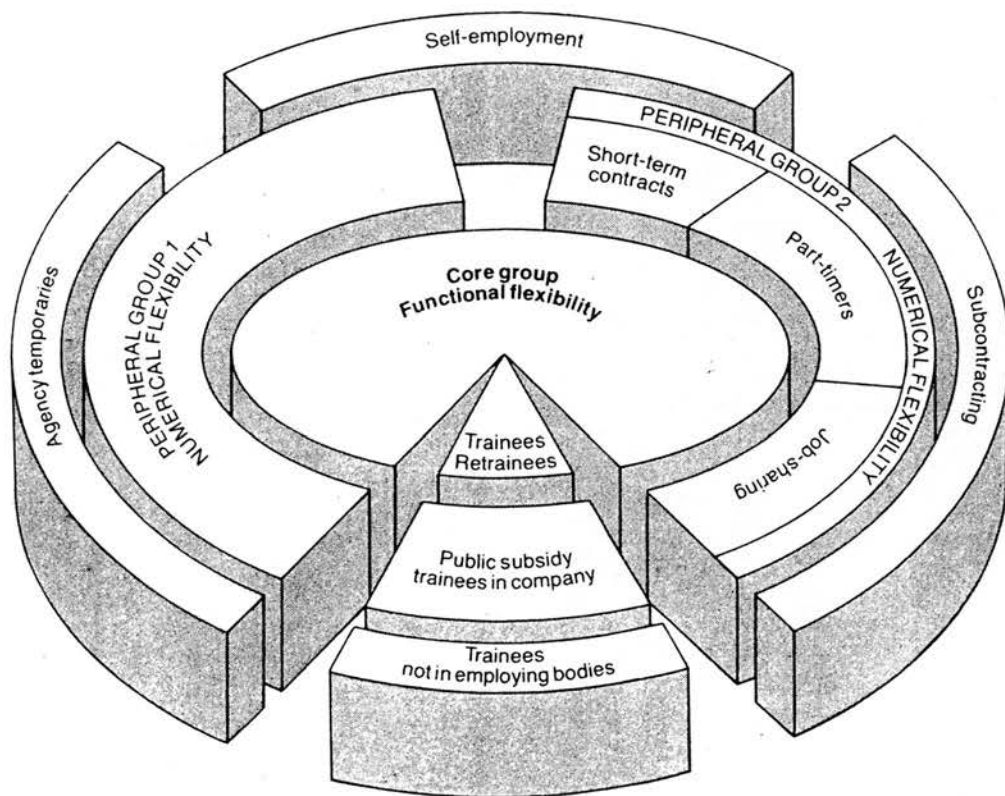
... identify different types of flexibility, to demonstrate how employers tend to seek those different types of flexibility from different groups of workers and to suggest that employers are reorganising their workforces into different categories according to their own (possibly unique) needs for flexibility. (Atkinson and Meager, 1986: 3)

Using the ideal-typical model of the 'flexible firm' as an analytical tool, Atkinson and Meager identify four variances of flexibility: numerical, functional and pay flexibility, as well as flexibility achieved through distancing strategies.<sup>38</sup> Numerical flexibility is used to balance production output with labour input to enable firms to respond to fluctuating demands – thus companies use supplementary labour resources, such as part-time, short-contract or temporary workers, to meet changes in output levels; functional flexibility concerns the versatility of employees; pay flexibility relates to the way in which corporate reward and pay structures support the company's ability to achieve numerical and functional flexibility; and flexibility achieved through distancing strategies 'involves the displacement of employment relationships by commercial ones, as employers may opt, for example, to subcontracting rather than reorganise their internal manning practice' (Atkinson and Meager, 1986: 4).

As can be seen in Figure 1 on the following page, the rise in the number of part-time, temporary and subcontracting work arrangements not only involves a decrease in regular full-time employment, but Atkinson and Meager (1986: 4-5) believe that it causes a split of the workforce into a core group of employees and two peripheral work groups. The concept of the workforce split into core and periphery has been widely adopted within post-Fordist debates (see, e.g., Harvey, 1989;

Murray, 1989). Murray (1989: 58) cites the example of Japan where this dualism is felt particularly acutely because only one third of the workforce is employed in a core industry where workers benefit from corporate welfare systems, jobs for life and a high level of skills; the vast majority of Japanese workers are employed in the ‘peripheral sub-contract and sweated economy, casualised, low-paid, weakly organised, and restricted to a grossly inadequate public welfare system’. Similar to the manual labourers in Fordist production plants who were deemed interchangeable, workers employed in peripheral industries are labelled dispensable.

**Figure 1 The Flexible Firm**



Source: Atkinson and Meager (1986: 4)

There is also a global dimension to the core/periphery debate, which relates to the spread of Fordism, that is the relocation of manufacturing plants from the ‘core’ capitalist countries (the US, Western Europe and Japan) to less developed, peripheral locations. This globalisation of the manufacturing process has had a significant

influence on the structure of the labour markets within the core capitalist countries since many of the semi-skilled or unskilled workers of the core economies have been replaced by workers within peripheral economies; this not only creates marginalisation of the peripheral workers in the core capitalist economies but further widens the gap between the workforces. Allen (1992) summarises these dual developments as follows:

In the central or core western economies, new technologies are ... creating a polarisation of the workforce ... So while a highly skilled, technical elite amass the advantages gained from increased automation, the majority are either deskilled or unemployed. Meanwhile, at the global periphery, routinized, labour-intensive methods of production predominate. (Allen, 1992: 190)

Summing up the core/periphery debate from a purely materialist perspective, which Vallas (1999: 95) maintains is the outlook taken by flexible accumulation theorists, the difference between core and periphery workers lies in how essential their skills are believed to be for the company.<sup>39</sup> Given this hierarchy, it is not surprising that workers in peripheral industries have to put up with less favourable working conditions – it is often these workers who have to cope with the adverse effects of flexibility, such as short-term contracts, hourly wage rates, etc. Following this line of interpretation, it can be argued that neither the traditional divisions between white-collar and blue-collar workers nor the traditional hierarchical structures have been overcome. This interpretation of the developments within ‘core’ capitalist economies therefore contradicts certain strands within post-Fordism – referred to by Vallas (1999: 70) as the ‘posthierarchical’ model of work (e.g. Zuboff, 1988; Heckscher, 1994) – as well as the claims of flexible specialisation theory. Vallas (1999: 95) adds a word of caution to those who take the core/periphery boundary for granted, because ‘rather than taking [it] ... as an economic fact, it will prove wise to problematize this distinction, inquiring into the processes through which this boundary is itself defined’.

## **2.6 From Goods To Symbols: Changing Patterns Of Consumption**

Following on from the transformation on the production side, it can be argued that the consumption side of the equation has similarly been transformed. Burrows, Gilbert and Pollert (1994: 3) characterise post-Fordism ‘in terms of a homology between “flexible” production techniques, differentiated and segmented consumption patterns, a restructured welfare state and postmodernist cultural forms’. Although it is generally argued that the spheres of production and consumption are interconnected,

there are significant differences in the interpretation of this relationship, i.e. in acknowledging which partner in the equation has been the driving force.

A comparison of the contrasting analytical standpoints of flexible specialisation and flexible accumulation theorists helps to illustrate this important interpretative difference within the flexibility debate. Piore and Sabel (1984: 189), for instance, dismiss accounts which seek to explain changes in the industrial structure by shifts in consumer taste. They argue that trends towards greater diversification on the consumption side were caused by changes on the production side, and not vice versa. Harvey (1989), on the other hand, rejects this approach in his theory of flexible accumulation, claiming instead that the shift from mass to flexible production is directly linked to changes in consumer taste:

... flexible accumulation has been accompanied on the consumption side ... by a much greater attention to quick-changing fashions and the mobilisation of all the artifices of need inducement and cultural transformation that this implies ... [while] the ferment, instability, and fleeting qualities of a postmodernist aesthetic ... celebrate difference, ephemerality, spectacle, fashion, and the commodification of cultural forms. (Harvey, 1989: 156)

Harvey's characterisation of the changes of consumption patterns has a number of important implications, two of which we now discuss. First, Harvey's observation about the 'mobilisation of artifices of need inducement' highlights the significant role of marketing research and advertising within the new system of accumulation and can be linked to his recognition that information has taken on the form of a commodity in today's industrial environment (Harvey, 1989: 159). The fundamental question, of course, is whether marketing research and advertising are the agents that mould and direct cultural trends in such a way as to facilitate companies' new accumulation needs or whether they seek to understand and reflect nuances of change within consumer taste. Nixon (1997: 192) makes an interesting point when he argues that flexible production is 'more directly marketing-led than mass production, with a tighter integration of the stages from design and production to distribution or circulation'. This suggests that companies have downgraded internal priorities and become increasingly focused on the consumer, thus giving rise to 'an end-user culture' (Nixon, 1997: 193).<sup>40</sup> Nixon (1997: 193) points out that this focus on the end-user also features in organisation theory literature where an emphasis is put on fragmented markets, diversification and faster-changing consumer tastes which are contrasted with the more stable markets and taste formations of Fordism.

Returning to Harvey's (1989: 156) assessment of changing consumption habits, the second aspect to which we need to draw attention is his emphasis on speed and ephemerality. Harvey supports his claims of the speeding-up of consumption by showing that overall product redundancy, which is an indicator of both the speeding-up of the production and the consumption cycle, has increased significantly; whereas the shelf-life of a typical Fordist product was 5-7 years, this has now been more than halved. Harvey (1989: 157) goes on to point out that the acceleration in consumption has resulted in a significant shift in what is produced, i.e. the emphasis today has moved away from the production of goods to the production of events which 'have an almost instantaneous turnover time'.<sup>41</sup>

Murray (1989: 44) agrees with Harvey that the shift in production methods was 'a response to, and a means of shaping, the shift from mass consumption'. He argues for the emergence of 'a culture of post-Fordist capitalism' in which 'consumption has a new place' (Murray, 1989: 47). He maintains that the old paradigm of 'keeping up with the Jones' has changed into 'being different from the Jones' which is not only expressed along (traditional) vertical lines, i.e. status and class, but also horizontally in relation to age, region and ethnicity (Murray, 1989: 44).<sup>42</sup> Bourdieu (1984) likewise claims that consumption serves an important role in social distinction. He argues that people of similar background and experience share a similar taste and subsequently, through our consumption choices, we make claims of belonging to a certain social class.

In a similar vein, Scott (2000: 21) argues that the number of those who can afford to practise the kind of consumerism that was traditionally confined to a small elite has risen considerably and that consumption patterns within advanced capitalist societies have moved beyond 'blunt consumerism'. He maintains that consumers today are no longer eager to chase 'middle class norms of possession', but have instead moved towards 'highly differentiated niches and life-style types'. Scott clearly rejects notions that view consumers in a passive light, since the plethora of consumer-group constellations facilitates varying interpretations and uses of what is on offer. Lash and Urry (1994: 61) claim that consumption has become reflexive in that it has moved from the dictates of tradition to the possibilities of individualisation; this claim aligns with Scott's observations regarding the decline of 'blunt consumerism' and the proliferation of 'life-style' types. Like Scott, Lash and Urry (1994: 61) argue that today's consumers can choose from a variety of life-styles and are 'forced to decide, to take risks, to bear responsibilities, to be actively involved in the construction of their own identities ... to be enterprising consumers'. However, for Lash and Urry (1994: 113) there are two possible sides to the

consumption of cultural objects: one that involves 'genuine aesthetic reflexivity ... [and] individualization', and another that results in the 'atomization of normalized, "niche marketed" consumers', thereby creating conditions of Fordism on the consumption side (Lash and Urry, 1994: 134). Despite these two paradoxical sides to the consumption of cultural objects, Lash and Urry (1994: 61) maintain that transformations on the production side, i.e. the shift towards small-batch production, were caused by the individualisation of consumer behaviour. Looking at the second type of cultural consumption, they state that:

... in a sort of 'contradiction of cultural Fordism' the pervasive flow of popular cultural objects through the information and communication structures can be simultaneously a condition of Fordist consumption and post-Fordist cultural production. (Lash and Urry, 1994: 134)

Harvey's observations regarding the commodification of cultural forms and the replacement of the production of goods by events, as well as the claims of changed consumption patterns of Scott, Murray, and Lash and Urry, take us one step closer towards understanding a fundamental feature of today's economic landscape: the fact that, within contemporary capitalism, the domains of the economic and the cultural increasingly coincide (Scott, 2000: 11). Scott (2000: 16) suggests that manifestations of this trend can be seen in the growing economic importance of sectors which produce outputs of cultural or symbolic significance, while culture on the other hand – as Harvey implied earlier – 'is increasingly being supplied in the form of commodified goods and services' (Scott, 2000: 11).<sup>43</sup> Scott (2000: 12) uses the term 'symbolic forms' to refer to these goods and services. Symbolic forms serve aesthetic or semiotic functions and are used for 'entertainment, communication, self-cultivation ..., ornamentation [and] social positionality'; they can be subdivided into 'pure' symbolic forms, such as music or films, and those forms which combine symbolic with utilitarian functions, such as furniture and clothing. He is quick to point out that as the distinction between symbolic and utilitarian functions is seldom clear-cut in contemporary products, it would be more relevant to examine 'their degree of co-presence in any given commodity' (Scott, 2000: 12).

For Goldman (1994), there are a number of implications associated with the interconnection of these two spheres. He maintains that:

... when capital annexes culture as a semiotic universe and directs the meanings of images to obey the logic of the commodity form, it also introduces into culture the contradictions of the commodity form. (Goldman, 1994)

Goldman thus argues that the swift turnover of signifiers and signifieds is linked to capitalists' desire to overcome obstacles of accumulation. In his view, the crisis of capitalism extends into the cultural realm, thus creating the cultural contradictions of post-modernity, because market competition demands greater product differentiation, which in turn calls for rapidly changing images as well as material objects. Drawing on Lash (1988: 391), Goldman maintains that market competition will eventually speed up the commodity cycle so much that signifier and signified fuse into one, causing the devaluation or fluidity of meaning.

Lash and Urry (1994: 60–1) also draw attention to the magnitude in which culture has entered the realm of the economic, i.e. 'the extent to which symbolic processes ... have permeated both consumption and production' and the increasingly design-intensive nature of modern production. They propose the notion of reflexive accumulation which draws attention to the inseparability of the cultural and economic sphere, since 'reflexivity is cultural, accumulation is economic ... and the economy and culture no longer function in regard to one another as system and environment' (Lash and Urry, 1994: 64). Criticising flexible specialisation, flexible accumulation and post-Fordism on a number of grounds (for example, for being unilaterally 'productionist'), Lash and Urry believe that reflexive accumulation is better suited to grasp current socio-economic processes, in which knowledge and information form the basis for economic growth.<sup>44</sup> Since reflexivity is to some extent aesthetic, the reflexive nature of modern economies draws attention to the fact that they combine information- and symbol-processing potential; this lends design processes a central position within production and also leads Lash and Urry (1994: 123) to suggest that the use-value and exchange-value of all modern goods are increasingly becoming sign-values – as has always been the case in culture industries.

According to Lash and Urry (1994: 122), the design-intensive nature of the production process turns flexible production into reflexive production. Looking at the music and publishing industries, they show how the time taken to develop products outweighs the time taken to produce them; consequently, in all culture industries, research and design (R&D) is the primary activity in the labour process while production/manufacturing takes secondary place.<sup>45</sup> Murray (1989: 44) also draws attention to the increasingly important role of design. For him, the growth in the variety and creativity of consumption practices has not only been accommodated by changes on the manufacturing side, but also through a 'revolution in retailing'. The core within this 'revolution' is retailers' increased capacity to innovate, which lies primarily with the designers; Murray estimates there are about 29,000 people in the UK working for design consultancies.<sup>46</sup> Harvey's observation about the shift from the

production of goods to the production of events is closely echoed by Murray (1989: 44), who states that designers 'are the engineers of designer capitalism. With market researchers they have steered the high street from being retailers of goods to retailers of style'. Jacobs and Kalman (1992) also trace the connection between changing patterns of consumption and the new, elevated status of designers by pointing out that

... products have a new role. Instead of being things that we buy to perform tasks, they are things that we buy to define who we are. And designers, who give products the characteristics that set them apart from other products, have become, purely by default, the priests and philosophers of our corporate culture. (Jacobs and Kalman in Yelavich, 1992: 33; cited by Press, 1995)

Lash and Urry (1994: 123) further point out that there is now a widespread emphasis on research, design and innovation throughout corporate culture. While culture industries have always accentuated activities like R&D, which are built upon the aesthetic and creative sensibilities of their key players, this is now prevalent in most other industry sectors. Lash and Urry (1994: 123) thus claim that 'ordinary manufacturing industry is becoming more and more like the production of culture', with the culture industries providing a template for other manufacturing industries.<sup>47</sup> They reject claims concerning the growing commodification of culture by pointing out that culture industries have always been post-Fordist in nature – even in the heyday of Fordism, i.e. well before the notion of post-Fordism was actually coined.

Thus, while some theorists have argued that increasing globalisation and conglomeration in the culture industries will perpetuate the Fordist malady of (cultural) 'sameness' on the consumption side, Scott (2000: 20) claims that globalisation produces 'a markedly more polycentric and polyphonic system of cultural production'. His observation is supported by Lash and Urry (1994: 305–6) who argue that, while there is evidence to suggest that the globalisation of culture is taking place through predatory mergers and take-overs within culture industries, this trend in itself does not produce a global culture. Lash and Urry (1994: 308) point out that 'consumers move increasingly on a world stage. Part of the power of the consumer stems from their lack of allegiance to particular national societies and their particular products and images'. They emphasise that centralised production (or the central co-ordination of decentralised production sites) stands in stark contrast to the diversified and fragmented use of cultural artefacts by local audiences.

## Summary

The aim of this chapter was to look at the broad spectrum of change within production, consumption, labour processes and interfirm arrangements that have occurred over the last 30 years or so. In order to assess change, one has to establish the basic principle of 'a change from what?'. We have therefore looked at Fordism and described its key characteristics (see Table 1). While scholars agree that Fordism represents a unique paradigm of industrial and societal relations, it is evident that they disagree about the precise nature and extent of change that has occurred. Consequently, this chapter has focused on the 'shift beyond Fordism' and the flexibility debate as propounded by a number of key theorists, such as Murray (1989), Harvey (1989), Piore and Sabel (1984), and Lash and Urry (1994).

Since the various post-Fordist strands, as well as Fordism, must be regarded as ideal types, it is at times problematic to determine the shift from empirical evidence to theorisation – or indeed the extent to which theories are grounded on empirical evidence. Not surprisingly, Vallas (1999) points out that some researchers

... have questioned the body of evidence commonly used to support the post-Fordist paradigm, which they see as comprising little more than a 'methodology of exemplars' (Penn and Sleightholme, 1995: 199). In the light of these and other criticisms, many social scientists have come to view the tales of flexibility as an assemblage of organisational 'just-so stories' (Sewell, 1995). (Vallas, 1999: 69)

Marshall, for example, suggests that the spread of computer-integrated manufacturing has been widely exaggerated. He draws on Meegan's (1988) study which shows that in the mid-1980s there was no evidence of such machinery to be found in the UK – although this type of technology existed elsewhere, for instance in Japan. Harvey (1989: 191) points out that 'flexible technologies and organisational forms have not become hegemonic everywhere (but then neither did the Fordism that preceded them'. Since the spread of flexible technology is often regarded as an important indicator for the move beyond Fordism, the question needs to be asked whether the total, or at least partial, absence of computer-integrated manufacturing methods contradicts theorists' claims with regard to the arrival of a new (post-Fordist) paradigm. Allen (1992: 189), for example, has stressed that computer technology has provided Fordism with a new lease of life because it has given mass production the necessary flexibility to sustain its competitive edge.

Vallas (1999: 86) makes a valid claim by suggesting that the deficits in the available literature and the disparity in the development of qualitative and quantitative research in these areas makes it impossible to reach definitive

conclusions. However, what does transpire is that the structural and organisational changes, both within the core capitalist economies and at a global level, support Allen's (1992: 194) and Harvey's (1989: 187, 191) suggestions that there is no single replacement of the Fordist mode of production, but rather a plethora of co-existing work regimes which can exist side by side, in the same location and/or the same industry sector. This observation leads Allen (1992) to make the point that it may not actually be possible to make any absolute claims regarding the direction of economic change within contemporary economy since economies today can no longer be understood in terms of 'national' economies. Instead, he argues that, if they are

... increasingly becoming 'sites' across which international forces flow ... then the new uneven global order will very likely be characterised by more than one line of economic direction within and between countries. The idea that a single dominant economic dynamic ... is capable of transforming much of the world economy may therefore represent the thinking of a modern discourse whose economic moment has now passed. (Allen, 1992: 202-3)

In the light of interpretative differences between theorists and the absence of sufficient empirical evidence in support of a specific theoretical position, what we can conclude with any degree of certainty is that the last 30 years have seen a number of transformations on the production and consumption side, but it is too early yet to speak of one dominant new paradigm. Allen makes a valid point by suggesting that uneven global developments and the breakdown of national economies make it highly unlikely that economic change will proceed in a unidirectional fashion.

While the use of ideal-typical concepts such as Fordism and post-Fordism has been shown to be useful when considering broad social, economic, political or cultural developments, in the following chapter the focus shifts to the analysis of transformations within one concrete industry sector, namely clothing manufacturing. Some of the insights from this chapter will be applied to ask whether clothing manufacturing, and more particularly, womenswear manufacturing has undergone a transformation which is fundamentally similar to that discussed in the context of this chapter. To this end Fine and Leopold's (1993) 'system of provision' approach is employed to help draw out the specificities of a particular commodity system and to highlight internal differences between its subsystems.

## Notes

1. Similarly Jessop (1992: 27) argues that the three basic structural features of the Fordist mode of regulation are 'collective bargaining among key groups of workers based on productivity plus inflation, Keynesian economic intervention by the state to secure full employment within the national economy, and social welfare policies that served to generalise norms of mass consumption.'
2. Piore and Sabel (1984: 206–7) argue that even during the height of mass production some firms were using craft production because the markets they catered for were too small and unstable to warrant the investment in specialised equipment necessary for mass production. 'Craft production supplied luxury goods, experimental products, the specialised equipment used in mass production, and the standardized goods for which the demand was too unstable to make the use of dedicated equipment profitable.' Piore and Sabel maintain that companies in an uncertain market either defer investments into mass-production machinery or change to craft-production techniques in order to rapidly access new markets. This is an interesting observation that contradicts other scholars' claims, e.g. that of Murray (1989: 39), who argues that mass production techniques transformed all sectors of the economy in the twentieth century, including the fashion industry. Changes in the fashion industry (a good example of an industry ridden by demand uncertainties) are discussed in the next chapter and reveal the predominant production techniques within this particular industry.
3. According to Murray (1989: 39), Ford's Model T sold for less than 10 percent of the price of a US craft-built car in 1916.
4. However, Jessop (1992: 27) goes on to point out that neither this circle of Fordist accumulation nor the previously mentioned labour processes typically associated with mass production were sufficiently widespread to signify 'the 30 golden years of the post-war boom'. Like Clarke, he thus points to the ideal-typical nature of the concept of Fordism and warns against confusing 'strategic orientation and reality'.
5. Dress, unlike any other material object, was ideal for displaying one's wealth and social worth. Fashion thus not only became an indicator of one's position, but also reflected one's aspirations and orientations. Between the fifteenth and seventeenth century, for example, the aristocracy expressed their power and privilege through sartorial extravagance in both male and female dress. According to McDowell (1984: 10, quoted by Craik, 1994: x) 'clothes were a tool of oppression, a weapon wielded against the poor. They were used to drive home the lesson that the grand were not simply different, they were better, because they were rich. They wore on their backs the proof that they were superior intellectually, morally and socially.'
6. 'Sumptuary' comes from the Latin word *sumptus* meaning cost.
7. Dress has been employed as a means of oppression or rebellion at different times and in various places. Foreign intruders were always eager to break ethnical identity and destroy the traditional systems of structure and beliefs by prohibiting indigenous practices and dress and imposing their own. The English, for example, prohibited the Irish from wearing their traditional dress in the sixteenth century; similarly, in the eighteenth century, the Scots were forbidden to wear the kilt and plaid. There are examples of resistance to this identity imposed by colonisers: Gandhi, for instance, wore a dhoti when he had an audience with British royalty (Craik, 1994: 28). Sumptuary laws not only regulated the way people dressed, but also affected other areas of life. Japan had the strongest sumptuary laws ever which regulated the style of clothes worn, as well as ways of sitting, speaking, walking, working and praying (Hurlock, 1929: 299).
8. It was in fact only used in 1928 by Paul Nystrom.
9. König (1973: 99) argues that societies with a rigid class structure have only experienced differentiation. Thus, the origin of fashion cannot be traced to the class system, but is more likely to be the result of rivalry between upper-class leaders.
10. This is a very interesting point, since similar arguments are used in post-Fordist debates as will be shown later.
11. According to Fine and Leopold (1993: 125), the entire average annual income of a domestic servant in the latter half of the eighteenth century could not even have purchased the material – let alone paid the tailor for making up the dress.
12. Fine and Leopold (1993: 125) maintain that the increasing frequency of fashion changes at this time may be an early example of dynamic obsolescence. This marks a significant change since

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previously clothing had been passed on from generation to generation. In effect, one could argue that clothing had made the transition from being a 'durable' to a 'perishable' good.

13. Murray (1989: 39–40) points out that mass producers were extremely vulnerable to fluctuating demand. Whereas Ford, faced by the 1930s depression, unsuccessfully tried to offset its effects by raising workers' wages, Keynesian demand and monetary management was more successful in stabilising the market.

14. This is reminiscent of Jessop's (1992: 27) observation that social welfare policies helped to generalise norms of mass consumption.

15. Fine and Leopold (1993:10) argue that within economic history there is a strong tendency to focus on the supply side, i.e. in terms of production, entrepreneurship, work and technology.

16. These five episodes were: the social unrests of the late 1960s/early 1970s; the introduction of floating exchange rates in 1971; the oil crisis of 1973 and 1979; and the world-wide economic downturn that started in 1980.

17. In 1970, 99 percent of US households had television sets, refrigerators, radios and electric irons, and more than 90 percent possessed automatic washing machines, toasters and vacuum cleaners (Piore and Sabel, 1984: 184).

18. This argument is central to flexible specialisation theory and will be taken up again later.

19. For example, Sabel (1989: 35) argues that it was not volatility as such, but rather the fragmentation of markets that overwhelmed the adaptive capacities of hierarchically organised companies. He maintains that even large companies are no longer certain what goods to produce and consequently opt to share development costs and risks amongst their subcontractors.

20. This point is discussed at length later on.

21. Atkinson and Meager (1986: 4) argue that subcontracting must be seen as a distancing strategy employed by companies to achieve greater flexibility. This point is considered in more detail later on.

22. This concept is typified by the world car strategy adopted by Ford and General Motors (Sabel, 1989: 20).

23. See Chapter 3 for a discussion of the changes within the UK clothing manufacturing industry.

24. 'Fluctuations in oil prices and differences in national tastes make it extremely difficult to develop models with universal appeal. Long-distance decentralisation hindered the timely detection of defective parts, and raised costs of remedying the defects. Maintenance of large buffer stocks to hedge against the disruption of long supply lines became prohibitively expensive as interest rates rose with inflation' (Sabel, 1989: 21).

25. If this term is still relevant today.

26. While Asheim's (1992: 46) statement seems to imply that one has to choose between broad and narrow definitions it can be suggested that approaching a research question from both a broad and narrow perspective provides more useful insights than restricting oneself to either of them. This can be clarified by looking at the relationship between this and the following chapter. This chapter draws attention to general developments in the socio-economic landscape which can be used as a template against which transformations within a particular industry sector bound by time-space specifications can be assessed, i.e. the womenswear manufacturing industry in the UK from the 1850s onwards. Rather than expecting to find a narrow fit between grand theory and a specific instance of empirical reality, one can hope to see some general patterns that may indicate to what extent the particular example of empirical reality does 'deviate' from what has been established as being the 'norm' for the time. If there is a large gap between grand theory and the concrete example this does not mean that the theory is generally flawed. Instead it may suggest that there are certain structural characteristics within that industry, which prevent it from following what seems to be the standard of the time. It is these latter questions of why an industry system exhibits different structures than one might expect that are of real interest.

27. This list, of course, is not comprehensive. It is only meant to give an impression of the diversity of approaches. Vallas (1999: 70), for example, shows that there are clear national variations in the support for varying strands of theory. In the UK, Atkinson's (1985) 'flexible firm' model has been at the centre of debate, whereas the 'new production concepts' of Kern and Schumann (1984, 1987, 1989, 1992) were most influential in Germany. These differences may be explained by the fact that the regional differences of Fordism have extended into a variety of ways beyond Fordism.

28. An exception to this is Clarke (1994: 17–8) who questions the commonly held assumption of the rigidity of Fordism. He argues that Fordism effectively overcame rigid technology and labour process organisation through the fragmentation of tasks and the standardisation of components. He argues that this resulted in Fordism's technological dynamism which 'implies a maximum of flexibility and adaptability of methods of production', extending far beyond the introduction of the assembly line. Clarke also emphasises that Fordism needed highly skilled workers to keep the momentum of continuous technological development. Thus the deskilling of the workforce was offset by the creation of a 'stratum of workers with polyvalent skills' who could operate the 'flexible and general purpose machines' needed for the continuous development of 'new tool, dies and machines'.
29. Scott (2000: 19) points out that Chamberlin's (1933) concept of monopolistic competition is of interest here. Chamberlin defines monopolistic competition as a modern form of market characterised by a large number of companies producing a variety of close substitutes, i.e. the jacket produced by one company serves a similar purpose to that produced by another; the only possible difference might be in terms of quality, for example in superior design or better cloth, in rival companies. The most remarkable feature of the market is companies' deliberate drive towards product differentiation ([www.pinkmonkey.com](http://www.pinkmonkey.com)). Product differentiation promises to attract a greater number of buyers and allows a company to exert control over demand and market conditions. Since potential consumers need to be made aware of a company's product differentiation, 'Selling (Advertising) Cost' is another important aspect of monopolistic competitive markets. This leads [www.pinkmonkey.com](http://www.pinkmonkey.com) to conclude that 'Selling Cost by itself is apparent product differentiation. When a product does not contain any genuine qualitative difference, buyers can be made to treat a product differently through advertisements.' Given these conditions in monopolistic competitive markets, it is not surprising that Scott (2000: 20) notes that increased competition spurs producers of cultural goods on to ever greater product differentiation – an observation that can be extended to encompass other industrial sectors.
30. This is a good example to highlight some of the problems associated with ideal types: because ideal types centre on generalisations rather than on particularities they are often built around a skeleton of presuppositions and thus may be biased. This criticism is levelled against some advocates of the flexible specialisation theory. For instance, Hirst and Zeitlin's (1991: 6) claim that constituting flexible specialisation and mass production as ideal types involves neither empirical generalisations nor descriptive hypotheses is criticised by Jessop (1992: 35), who argues that 'this implies that such ideal types are intended to serve only as yard-sticks with which to compare different empirical cases in terms of their relative deviation from some non-normative norm'. While employing ideal types may be a useful means for highlighting important features of a concept, it makes the concept as a whole rather slippery.
31. This raises the question of empirical evidence and arguably questions the validity of some theories' claims.
32. Lower transport costs are another important factor in the shrinking of space.
33. Brusco (1989: 260, in Asheim, 1992: 50) maintains that in industrial districts specialisation has taken on the role of vertical integration due to the concentration of high-level skills.
34. As we shall see in Chapter 3 there is a long-standing tradition of subcontracting in the womenswear industry.
35. Vallas (1999: 72) points out that flexible specialisation theory is partially influenced by Marshall's conception of industrial districts and by the economic regionalism that has come to be known as the 'Third Italy'. Often-cited examples of industrial districts, besides the Third Italy, include: Silicon Valley (California), Toulouse, Jutland and Baden-Wurtemberg (Asheim, 1992: 52).
36. As shown in Chapter 3, the demise of Marks & Spencer in the late 1990s and the follow-on effect this has had for its major suppliers is a good example of this.
37. Asheim (1992: 48) points out that neither numerical nor functional flexibility are truly new phenomena. He argues that the former has been practiced at least since the industrial revolution, whereas the latter was introduced towards the end of the 1960s and formed a central aspect of the 'humanisation of the labour process'.
38. The split into core and peripheral workforce has affinities with Becker's (1982: 12) observations concerning the role of the division of labour in art worlds. See the detailed discussion in Chapter 1.
39. This issue will be taken up in Chapter 6 in connection with the discussion of the consumer image as 'unifying principle'.

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40. This observation can be linked both to claims of the intertwined nature of the realms of culture and economy in contemporary society and the increasing semiotic value of commodities.
41. It is interesting to note that while Harvey (1989: 171) sees 'rampant individualism' as a necessary condition for the shift to flexible accumulation, he does not explicitly link it to changes in consumption patterns. He merely lists the celebration of difference as one of the qualities of postmodernist aesthetic (p. 156).
42. Scott (2000: 16) includes 'the media (e.g. film, television, music, publishing), fashion-intensive consumer goods sectors (e.g. clothing, furniture, jewellery ...), many different types of services, (e.g. advertising, tourist facilities, or places of entertainment), and a wide assortment of creative professions ...[as well as] museums, art galleries, or libraries'.
43. The notion of information entails a strong emphasis on 'communication structures, both within the firm and in final outputs [and] ... a certain closeness to markets, in which a maximized flow of communications enables quick changes in production lines.' Indeed, Lash and Urry's (1994: 61) emphasis on communication, knowledge and information is reminiscent of some of Harvey's (1989: 159) earlier observations.
44. Lash and Urry (1994: 123) point out that what is labelled 'production' in culture industries is in fact 'design, product development or R&D', whereas 'reproduction' is actual production. Thus, we will see in Chapter 5 that in the fashion industry, for example, the initial development of a range of sample garments by designers, buyers and merchandisers is a process that can stretch over many months and is thus more lengthy than the actual cutting, sewing, trimming etc. of the final garments. Thus, design/product development takes a primary position over manufacturing.
45. Looking at the numbers for the culture industries overall, Pratt's (1997, in Scott, 2000: 16) estimate for the UK in 1991 was just under 1 million workers, i.e. 4.5 percent of the total workforce. However, Scott (2000: 16) points out that the actual figures may be higher since ambiguities of standard industrial classifications may result in an underestimate.
46. Culture industries, on the other hand, turn increasingly into business services (Lash and Urry, 1994: 138). Thus, culture industries' products lose their commodity status and turn into advertisements. For Lash and Urry, culture industries are post-industrial, since they 'sell not themselves but something else and they achieve this through 'packing'. Also like advertising firms, they sell 'brands' of something else. And they do this through the transfer of value through images.' This observation is clearly more applicable to music or publishing companies than to high street fashion retailers since the latter primarily sell their own brands – although a strong brand image undoubtedly adds value to a retailer's range of clothing and is of importance in the battle for market share. There are some examples of fashion companies, for instance Benetton, that do resemble Lash and Urry's (1994: 142) description of business services, because 'production is increasingly outsourced to leave a core of finance and distribution functions.'
47. Lash and Urry (1994: 130) maintain that 'the battle for predominance' within the culture industries is decided on the grounds of where the design skills are. This is an interesting idea, especially in the context of the fashion industry, since there has been a significant shift in the balance of power between manufacturers and retailers with the latter, as shown in the Introduction, now clearly dominating the design process.

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## Chapter 3: Product Differentiation And Mass Production – Production Strategies For Divergent Fashion Systems

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As shown in the previous chapter, the concepts of Fordism and post-Fordist theories possess many of the characteristics of ideal types since they relate to general economic trends rather than specific cases. This chapter moves on from a general discussion of economic transformations to one specific industry: the fashion industry. Although the fashion industry consists of three interconnected sectors – textile, manufacturing and retailing – the focus here is on changes in manufacturing.

Clothing manufacturing embraces a wider diversity of organisational structures, and generates a greater range of products for a variety of markets, than most other industries (Bythell, 1978: 65). This becomes clear when looking at the UK clothing market today which is, for example, divided into menswear, womenswear and childrenswear, into outer- and underwear, into formal- and casualwear. Moreover, we find that garments designed for teenagers are different than those aimed at an older market and clothing is stratified according to price ranges.

The following discussion is based on Fine and Leopold's (1993) 'system of provision' approach which draws attention to the fact that clothing manufacturing, and womenswear in particular, consists of a complex web of subsystems that answer different consumption patterns, and are based on a variety of production and labour systems. Thus, in contrast to the theories of the previous chapter, which charted broad economic developments, the system of provision approach highlights the differences between commodities – even within a specific commodity group such as clothing. It is therefore a useful tool for analysing (a) whether the fashion industry has adhered to the broad principles of economic restructuring discussed in Chapter 2, and (b) whether there have been differential transformations within the various fashion subsystems, such as menswear compared to womenswear.

The overall aim of the chapter is to assess whether clothing manufacturing, and womenswear in particular, has ever adopted Fordist principles of production.<sup>1</sup> Although the period from 1945–73 is commonly considered the heyday of Fordism in the US and Western Europe, it is argued that in order to assess the extent of changes and to appreciate their implications, one has to look at the wider historical development of clothing manufacturing and not just concentrate on the post-Second World War era. The period covered in this chapter therefore spans more than 150 years – from the mid nineteenth to the beginning of the twenty-first century. As with

the previous chapter, changes are traced by looking at four key themes: production processes, consumption patterns, labour relations and interfirm arrangements.

The chapter starts with an introduction to the 'systems of provision' approach, followed by an examination of the developments in menswear and womenswear manufacturing in the UK and the US from the 1850s to the early twentieth century. It is demonstrated how the menswear and womenswear fashion systems have undergone markedly divergent transformations – particularly in relation to the spread of factory production, which was adopted earlier in menswear than in womenswear. This is followed by an analysis of the 'evolution of fashion' in the 1920s and 1930s, and a comparison of the varying development of basic and fashion-sensitive segments of womenswear – with special emphasis on womenswear manufacturing in London's East End. A subsequent examination of the 1940s shows how the enforced regulation of design during the Second World War contributed to the 'sobering-up of fashion', but how fashion re-emerged in the mid to late 1950s. Finally, it is shown how clothing manufacturing in Britain in the 1960s and 1970s underwent a series of crises, such as the impact of foreign competition and offshore sourcing – problems reminiscent of some of those experienced in the 'crisis of Fordism' analysed in Chapter 2.<sup>2</sup> The relationship between the fashion level of a fashion system and its organisational structure forms the basis for the analysis of retailers' working practices in Chapter 5.

### **3.1 Systems Of Provision**

As demonstrated in the previous chapter, theories of consumerism and economic change take either a demand-led or supply-led approach. Fine and Leopold (1993: 4) argue that these 'horizontal' approaches are fundamentally flawed because they start off 'with a particular factor considered crucial to the determination of consumption and generalise from it across the economy as a whole', then indiscriminately put completely unrelated commodities together, and 'bend [them] collectively to follow the contours set out by that particular theory' (Fine and Leopold, 1993: 21). Greatly simplified, horizontal approaches advocate either that (i) advances in information and communication technology (ICT) have transformed the entire industrial landscape and changed consumption patterns in their wake; or (ii) increasingly differentiated and fragmented consumer tastes have caused the breakdown of mass production, and its replacement with flexible economies of scope catering for this new form of consumerism. These supply- and demand-led approaches illustrate the ideal-typical character of many of these theories: a character that has been shown to be problematic.

In an attempt to avoid these pitfalls of generalisation, Fine and Leopold (1993: 4) advocate a vertical 'system of provision' approach based on the assumption that each commodity (or group of commodities) is characterised by the interplay of a specific pattern of production with a specific pattern of consumption. The strength of this approach lies in examining the specific and changing interplay of supply and demand. Viewed from this perspective, it is easy to see why the logic of mass production was successfully applied to some branches of the clothing industry much earlier, and more widely, than to others. It can also be seen why a particular type of production process and labour system works more efficiently for the production of one commodity in comparison to another. Fine and Leopold (1993: 94–5) therefore reject broad statements about the omnipresent nature of one particular method of production across all industry sectors (see Murray, 1989) because they believe that the 'presumption of universal mass production for mass markets, tends to flatten out retrospective differences in the parts taken by individual industries in their development'. They also maintain that accepting the centrality of mass production offers an insufficient explanation as to 'what is consumed and why' and fails to account for the variations in development 'across different commodities and across different countries' (Fine and Leopold, 1993: 71). Rather they argue that differences in production, for instance in terms of the labour systems and technology employed, are sufficiently diverse to account for 'diversity in consumption even if it were the passive reflection of production' (Fine and Leopold, 1993: 71).

Reflecting the discussion of theories of consumerism in Chapter 2, Fine and Leopold also take issue with demand-led theories, such as that of McKendrick et al. (1982). This rejection of supply- and demand-led theories of consumerism does not mean that Fine and Leopold (1993: 73) advocate an approach giving 'equal weighting in the simultaneous determination of outcomes'; such an approach would merely describe market outcomes rather than explain them. Rather they argue that demand and supply should be seen as 'structured consequences of dynamic economic and social relations and processes' – a perspective that emphasizes the dynamics of the relationship between the two forces (Fine and Leopold, 1993: 74). Industries are not just influenced by supply and demand but by intermediate agencies, such as distribution and retailing. In addition to connecting the other two realms, these agencies influence changes within them due to their specific nature, timing and endurance. An examination of the specific dynamics between supply, retailing and demand shows that 'each industry (and in the case of clothing, each subsector) has developed a distinct system of provision which displays an internal coherence of its own' (Fine and Leopold, 1993: 96). Industrial development is thus characterised as a

complex balance of shifting power between demand, supply and distribution that over time has given industry systems (and subsystems) their specific characteristics.

In developing this argument, Fine and Leopold (1993: 72) show how commodities or groups of commodities encompass stronger vertical links (from production to consumption processes) than horizontal ones across different commodities. In contrast to horizontal approaches that emphasise commonalities, the vertical approach embraces the:

... differences in the way in which production and consumption are united together and the ways in which each is moderated by the connections between them [...] different systems of provision across commodity groups then, are the consequence of distinct relationships between the various materials and cultural practices comprising the production, distribution, circulation and consumption of the goods concerned. (Fine and Leopold, 1993: 4–5)<sup>3</sup>

In addition, the system of provision approach makes allowance not only for differences between the production and consumption of, say, cars and clothing, but also for the existence of various subsystems (e.g. menswear/womenswear, basic/fashion garments) within one system of provision. This approach does not imply that these subsystems are of a completely different order or that they are totally unaffected by broad economic trends, such as a move towards mass production. Rather it takes account of the fact that the extent and timing of such forces may vary between systems, and that new developments, such as technological innovations, may affect the structures of their production processes in different ways.

In contrast to demand- and supply-led theories which are constructed in an antithetical manner, i.e. factors linked with one strand of theory are not compatible with those of the other, Fine and Leopold (1993: 21) recognise that commodities may differ in the degree to which they are subject to emulation, consumer sovereignty, and so on. The characteristics of a commodity may change significantly over time; as shown later womenswear, for instance, made an important transition from ‘consumer durable’ to ‘perishable’. Thus, the system of provision approach adds an analytical sensitivity to the differences and similarities between the varying ranges of commodities:

All [commodities] tend to be the product of wage labour, but production processes are organised differently, products develop differently, are distributed and sold differently, are consumed and disposed of differently; they serve needs that are themselves socially constructed and satisfied (or not) very differently. (Fine and Leopold, 1993: 22)

This approach thus offers a more balanced alternative to the production–consumption relationship than traditional horizontal supply- or demand-led theories. With its emphasis on the importance of variations in the interplay between the supply, consumption and distribution elements of commodities, the system of provision approach is reminiscent of the culture of production approach discussed in Chapter 1.

Fine and Leopold are not alone in advocating a vertical approach to consumption, as proved by the increasing interest in the study of ‘commodity chains’ in recent years (Leslie and Reimer, 1999: 401; Leslie, 2002: 62). Similar to the system of provision approach, research into commodity chains covers ‘the system of production, distribution, retailing, design, advertising and final consumption for particular products’ (Leslie, 2002: 62). Analysing the network of labour and production processes involved in the creation of commodities, this research provides a useful tool for investigating the distribution and shift of power along the chain (for example, at the manufacturer–retailer interface) as well as the significant position of retailers in linking production and consumption (Leslie and Reimer, 1999: 403).<sup>4</sup>

The strength of the claim that commodities have different and fluctuating supply- and demand-patterns is now investigated by looking at the historical development of ready-to-wear and factory-produced clothing for men and women.

## **3.2 Divergent Developments In The Menswear And Womenswear Industries In The Nineteenth Century**

### **3.2.1 Gender and clothing**

The methodological validity of the system of provision and commodity chain approach is clearly highlighted when looking at the fashion industry. As we have seen, the fashion industry consists of three sectors (textile, manufacturing and retailing) as well as a heterogeneous array of ‘clothing systems’ (factory-made/ready-to-wear/bespoke clothing, basic/high-fashion garments, menswear/womenswear) which all have different yet interrelated production and demand histories and realities (Leopold, 1992: 103). Therefore, in order to assess changes in the fashion industry, it is not sufficient just to discuss the industry *per se*; one also has to draw careful distinctions between the various sectors and systems. A good example of the varying developments of clothing systems – and of the need to be aware of internal distinctions between commodities that on the surface belong to the same group – can be found by comparing menswear and womenswear.

Everyday clothing for men and women of the lower classes had been quite distinct since the advent of tailoring techniques in Europe in the 1340s (Rouse, 1989:

109); the fashionable dress of the higher classes only became clearly gendered considerably later. Up until the end of the eighteenth century, for instance, it was common for both men and women to wear ruffs, furs, wigs, make-up, jewellery, and so on. In fact, historically and cross-culturally, it was not at all uncommon for men to be more elaborately dressed than women as richness in clothing and adornment reflected high social and political standing. It was not until the eighteenth century that gender-related differences in the dress of the upper classes became more pronounced; in fact, it was only with the introduction of industrialisation that clothing became more strongly gender-related. The more common gender distinctions found in Western societies today, for instance in terms of colour (blue – male, pink – female), date back to nineteenth-century France and only filtered through to the rest of the Western world in the 1920s. Hence, it was not at all unusual for an eighteenth-century nobleman to be dressed in pink tights (as worn by George IV for his visit to Edinburgh in 1822) or a pink silk suit (Steele and Kidwell, 1989: 6). However, as Davis (1992: 39) argues, by the mid-eighteenth century, the male ‘peacock’ disappeared from Western culture and men’s clothing became more uniform; the ‘invisible men’ came to dominate the sartorial landscape (Polhemus, 1988: 65).

It is fair to say, following Barnard (1996: 119) that ‘men’s privileged access to the factory, the office and the market-place was reproduced ... by the fashions and clothing that they wore, which were suited, or suitable for, such places’. As work became central to men’s identity, qualities such as discipline and reliability became incorporated into notions of masculinity. This centrality of work in men’s self-definition marginalised other aspects of their lives that had been formerly reflected in their clothing (Davis, 1992: 39).

While in Western Europe and the US men’s clothing became increasingly sober and plain, women’s fashions became more elaborate.<sup>5</sup> Veblen (1908) relates this to the fact that women (and children) had to consume ‘on behalf’ of their husbands and/or male relatives, whose earlier entrance into the labour market prevented them from continuing with their own sartorial displays:

It is by no means an uncommon spectacle to find a man applying himself to work with the utmost assiduity, in order that his wife may in due form render for him that degree of vicarious leisure which the common sense of the time demands. (Veblen, 1908: 81)

Clothed in more elaborate fashions, women became transformed into spectacles for the male gaze (Silverman, 1986:141). The pleasure derived from

looking thus became gendered and divided into active (male) and passive (female) forms. This distinction was accentuated by the very structure of clothing which allowed men far greater bodily movement than women, whose clothes increasingly subjected them to physical constraints. The defining features of femininity thus came to be equated with frivolity, inactivity and delicacy, which helps to explain why concerns with fashion have often been regarded as an exclusively female activity and thus marginalized as inconsequential.

### **3.2.2 The ready-to-wear clothing systems**

Parallels to these differences in the development of men's and women's attire can be found in the spread of ready-to-wear clothing in the two fashion systems. Ready-to-wear clothing systems developed from the bespoke clothing trade and were used to build up stock during periods of slack. However, unlike bespoke garments, ready-to-wear or 'off-the-peg' clothing carried negative connotations for much of its early history owing to inferior quality and fit. Since clothing served as an important social (and moral) indicator, being neatly and properly dressed was of great importance; shabby, badly-fitting clothes did much to ruin the wearer's credibility and social acceptance.<sup>6</sup> Indeed, Levitt (1981: 49) attributes the fact that we know little of the early development of ready-to-wear clothing to its negative social connotations, which she believes would have prevented wearers of ready-made garments from flaunting the fact that they could not afford the bespoke garments of their social superiors. Although ready-to-wear garments were cheaper than bespoke ones, they were nonetheless unaffordable to the great majority of the British population.<sup>7</sup> Up until the 1830s, tailor-made garments were an unattainable luxury for the working classes (Garnet, 1988: 29). Lower-income families thus relied on home-made and second-hand garments (hand-me-downs as well as purchased goods), which created an extensive industry built around the 'translation' or 'clobbering' of second-hand clothing, footwear and hats (Wilson and Taylor, 1989: 40–1). It was not just the working classes who sought to recycle garments for as long as possible. As clothing in the nineteenth century was still expensive and thus expected to last, even middle-class women often had their dresses mended and adapted for further use (Wilson and Taylor, 1989: 38). Largely due to this practice, even after the widespread availability of the sewing machine, expensive silk dresses were still sewn by hand since hand-sewn seams were easier to unpick.

The emergent ready-to-wear clothing industry thus had to compete with the bespoke and second-hand clothing trades. Indeed, many of the early ready-to-wear garments aimed at the cheaper end of the market were often of such inferior quality

and style that second-hand bespoke garments were more attractive, both in terms of cost and craftsmanship. Some higher quality garments were also produced, such as loose-fitting capes and mantels (Ewing, 1997: 50).<sup>8</sup> However, the fashion for tight-fitting bodices prevented manufacturers from producing completely made-up dresses. Therefore it was common practice throughout the nineteenth and early twentieth century to sell dresses that were only partially finished; for instance, with a completely made-up skirt but with additional material and trimmings supplied for the bodice, or bodice seams left open, so that dresses could be fitted and finished to the customer's measurements, either by her personal dressmaker or in the retailer's own workroom. While in the mail-order trade, customers were asked to provide their body measurements or a well-fitting garment as a guide (Rouse, 1989: 256).

There were exceptions to these practices: Adburgham (1967: 125) describes how Jay's were advertising completely sewn ready-to-wear dresses with a 'self-expanding' bodice in 1866; whereas Beazley (1973: 57) attributes the first completely made-up dress to Moses & Son in 1857. However, the nineteenth-century use of the word 'dress' could refer both to a complete garment as well as to the fabric. Therefore it is not clear whether 'sewed muslin dress' in Bainbridges of Newcastle's advertisement of 1845 refers merely to a dress-length piece of embroidered white muslin, as suggested by Beazley (1973: 56), or to the first completely made-up dress (Adburgham, 1967: 125). Despite these slight uncertainties, from the 1860s onwards ready-to-wear dresses were increasingly gaining in popularity – indeed, an engraved plate advertising a ready-made dress in 1861 suggests that good money could be made from them (Beazley, 1973: 58). However, as we shall see, there is evidence to suggest that, up until the First World War, ready-to-wear garments only represented a small proportion of the women's clothing industry (Fraser, 1981: 179).

Despite the relative increase in demand for ready-made garments, the fashion for tight-fitting bodices in the mid-nineteenth century posed a considerable problem for manufacturers of ready-to-wear womenswear since there was no standardised sizing system for women at that time. The problems this caused for the advance production of womenswear are illustrated by Rouse (1989) who maintains that even in the late nineteenth century, high quality ready-to-wear dresses in the newly developed London department stores were only made in one size, the so-called 'stock' size.<sup>9</sup> Subsequently, 'if larger or smaller sizes were attempted, it usually meant that an inch or so had been added or subtracted all round' (Rouse, 1989: 256).

The absence of a sizing system for women was one of the many impediments to the establishment and acceptance of ready-to-wear womenswear and explains why

private dressmakers continued to be the major producers of clothing for those who could afford to patronise them. Although there was a market for ready-to-wear dresses, the absence of a sizing system and the very nature of women's fashions (i.e. tight-fitting bodices) proved to be a great impediment to the spread of this new system of provision in womenswear (Rouse, 1989: 258).

In contrast, the development of ready-made menswear was hampered neither by complicated fashions nor by manufacturing problems associated with the production of garments in advance for unknown customers since a standard sizing system had already been established in the nineteenth century. The first sizing system was developed during the American Civil War (1861–5) for use in the production of military uniforms; after the war, this system was used for civilian clothing (Fine and Leopold, 1993: 100).<sup>10</sup> This informed knowledge of the range of men's sizes decreased the risk of producing badly fitting garments for unknown customers. Thus manufacturers could 'act at a distance' in providing for the consumer market (Latour, 1987: 223). The sizing system 'provided a useful medium of bodily communication between manufacturer and ultimate consumer' (UK Board of Trade, 1957: 9, in Jeacle, 2000: 11) and altered the quality of ready-made clothing. It also revolutionised the manufacturer–customer relationship; rather than catering for individual customers, manufacturers now catered for 'body types'. In fact, the concept of a 'standard size' is that of the 'standard' body; unique properties of individuals were replaced by broad categories of customer types (Jeacle, 2000: 11).

The history of ready-to-wear clothing for men confirms that it was indeed customer groups and not individuals for whom the first ready-made garments were produced. Lemire (1999: 23–5) demonstrates how the clothing requirements of the English military in the seventeenth century contributed to the restructuring of the country's ready-made clothing trade, which was expanded in the second half of the seventeenth century to cater for civilians as well. The significance of institutional demand as a driving factor within the mass production of ready-made menswear is illustrated by Fine and Leopold (1993: 98), who argue that in the US in the nineteenth century the first groups of men to be clothed in ready-made garments were railway workers, slaves and members of the armed forces, whose clothes were supplied by centrally organised procurement agencies (military), the state (railway workers) or plantation owners (slaves). These groups of men were (mostly) unable to purchase clothing based on their personal preferences owing to monetary or other restrictions: 'markets existed for these goods [i.e. ready-made clothes], individual consumers did not' (Fine and Leopold, 1993: 98).

Thus standardisation of clothing, which was an important prerequisite when catering for unknown customers, was much more easily achieved in this context than when dealing with private customers who could, at least in principle, base their buying decisions on their own taste. However, it was not just the expansion of the male workforce that contributed to the spread of ready-to-wear clothing in the US from the 1850s onwards, but also the location of men's workplace (far away from cities or indeed their homes) combined with their harsh working conditions – manual labour still outweighed the use of machines as late as 1850 (Fine and Leopold, 1993: 99).<sup>11</sup> The working conditions and location of work are significant here because they explain the need for sturdy protective/utilitarian clothing, which was ideally suited for standardised production, and demonstrate how workers had no access to people with sewing skills, neither on a professional (tailors) nor a private (female family members) basis. In Britain, on the other hand, the growth of the ready-to-wear menswear industry was helped by the newly emerging 'class of wage-earning town-dwellers ... [and] by growing numbers of professional men' (Levitt, 1981: 50) from the lower middle classes who had enough money to spend on fashionable ready-made clothes.<sup>12</sup>

Women's lives and work conditions in the nineteenth century were totally different to those of men: the few women employed in wage labour often worked from home and were therefore not confined to the same sartorial restrictions and conventions as their male counterparts. Consequently, 'the same early prerequisites for change' were absent from the womenswear clothing system (Fine and Leopold, 1993: 100). Women bought far fewer ready-to-wear clothes than men because those who could afford to frequent dressmakers continued to do so, while economic circumstances forced the majority of women to carry on making their own, and their children's, garments. However, women's clothing consumption patterns changed during the first third of the twentieth century. This can be seen by comparing the cost of living indexes for working-class households for 1904 and 1937–8 (in Adburgham, 1967: 332). While, in the index for 1904, a large allowance was made for piece goods, the expenditure on women's and children's ready-to-wear clothing and underclothing was small, which suggests that working-class women at the turn of the century were making most of their own and their children's clothing. However, by 1937–8, the situation had changed quite dramatically with the expenditure on women's and children's clothing rising by almost 1000 percent, while that for piece goods dropped by 70 percent. One can thus see the significant differences between the markets for ready-made womenswear and menswear in the nineteenth and early twentieth century.

### 3.2.3 The impact of the sewing machine on developments within clothing systems

The divergent development of sizing systems for men and women was just one of many factors responsible for the discrepancies in the evolution of these two clothing systems. Another factor influencing the different developments of menswear and womenswear was the introduction of what was undoubtedly the most central piece of equipment within clothing manufacturing – the sewing machine, which Singer began to mass-produce soon after eventually patenting it in 1851.<sup>13</sup>

Although, as shown later, the introduction of the sewing machine did not exactly revolutionise clothing production, it certainly encouraged greater stylistic differences between menswear and womenswear – such as standardisation in the former and elaboration in the latter. These stylistic differences further accentuated the gap between the two fashion systems and helped to spread factory production in menswear, while freezing womenswear manufacturing in the *status quo*:

While men's dress was tending to become standardised, women still sought individuality; the diversity of decoration on surviving dresses would have been impossible to produce commercially before the introduction of the sewing machine. (Levitt, 1981: 54)

An examination of the changes in womenswear in the mid-nineteenth century reveals a trend towards greater elaboration of garment styles. Although the sewing machine was hailed as a time-saving device (Rouse, 1989: 251), it had the opposite effect and encouraged 'the production of ever more elaborate clothing, requiring more seams, trimmings, drapes and ruffles and enabling her "to put a hundred tucks where once she put three"' (Fine and Leopold, 1993: 102, quoting from *Household Economic*, 1897: 242 in Brew, 1948: 424). This statement is supported by Wilson and Taylor (1989: 36) and Levitt (1981: 54) who argue that surviving examples of early machine-stitched clothing from the 1860s show that the machines were put to use in an ornamental, rather than purely utilitarian, capacity. Rather than creating standardisation in the production of womenswear, the use of machinery increased the quality of ready-to-wear clothing by introducing a greater complexity to garments formerly associated only with the bespoke trades. Indeed, the sewing machine's impact on womenswear was so strong that, by the 1870s, women's garments with their 'mass of pleats and frills ... and tight-fitting bodice ... were completely unsuited to factory production' (Rouse, 1989: 254). Thus, Marx's famous prediction that the sewing machine and other progressive forces would abolish 'the murderous, meaningless caprices of fashion' and erode the 'technical basis on which seasonal

work was really supported' certainly did not come true (Fine and Leopold, 1993: 100, quoting from Levine, 1924: 382).

The use of the sewing machine as an instrument for ornamentation in womenswear is reflected in the history of its development. According to Knight's *American Mechanical Dictionary*, by 1882, attachments had been developed that increased the capacity of the sewing machine and allowed the operators to use as many as 68 different stitches (Gilbert, 1970: 3). The two basic models of sewing machines available in the nineteenth century – the chain stitch and shuttle machine – inspired many variants (Schmiechen, 1984: 25). One US company, for instance, claimed to have developed 400 different types of sewing machines by 1900 while, 70 years later, 5,000 industrial machines were available, many of them highly specialised (Gilbert, 1970: 4).

It is in this connection that Fine and Leopold (1993: 102) are justified in arguing that advances in sewing technology required an increasing level of skill on the part of the machine operator. This leads them to conclude that 'mechanisation in this case served to reinforce rather than undermine the craft basis of production' and that the sewing machine was a tool that exhibited many of the characteristics important for flexible specialisation (Fine and Leopold, 1993: 102).

However, while the sewing machine's potentials was exploited for ornamental work in womenswear, in menswear the trend towards standardisation meant that the sewing machine was predominantly used to speed up production and thus increase productivity levels. A mid-Victorian gentleman's shirt (requiring more than 20,000 stitches) could be machine-sewn at a rate of 1–2,000 stitches a minute compared to a hand-sewer's average of 35 stitches per minute (Schmiechen, 1984: 25). This increase in speed saved time and raised workers' overall productivity; the larger and more standardised the batch sizes, the greater the productivity. Increased productivity in turn had a positive effect on garment prices: Schmiechen (1984: 24), for instance, maintains that shirts cost 75 percent less in 1900 than they did in 1850.

Thus the sewing machine was not only indirectly responsible for the trends towards increasing complexity of women's fashion and standardisation of men's clothing, but was arguably a driving force in the ever quickening cycle of fashion.<sup>14</sup> The widespread adoption of the sewing machine helped to give fashion all the characteristics associated with it in the twentieth and twenty-first centuries: speed and changeability, and, as a consequence, demand uncertainty (the impact of this is discussed in more detail in section 3.2.2). Taking into account these contradictory dimensions of sewing technology – ornamentation, standardisation and speed – it is important to reassess Fine and Leopold's (1993: 102) claim that sewing machines

reinforced the craft basis of clothing production. With this broad statement they seem to have fallen into the very trap they were seeking to avoid by advocating a system of provision approach. While the sewing machine can and has been used for complex ornamental work on fashionable women's garments, it has also been used to perform more standardised operations in basic menswear and womenswear. Thus, depending on the context of its use, the sewing machine has a dual role of either encouraging craft-based skills or creating repetitive, routinized work to increase speed which downgrades workers to 'machine operators'.

Having discussed some of the reasons for the divergent developments in menswear and womenswear, the emphasis now shifts to the way in which production has been organised to meet the specific needs of each clothing system.<sup>15</sup>

### **3.2.4 The organisation of production in the ready-to-wear clothing systems**

Although there were many differences between bespoke and early ready-to-wear garments, the actual production processes involved were remarkably similar. This is not the case when comparing the production techniques of bespoke and factory produced garments. While early ready-mades 'did not imply any changes in the methods, organisation or location of manufacturing', the organisation of factory-produced clothing was fundamentally different because it entailed 'the investment in and co-ordination of labour and machines in a designated workplace for the purpose of increasing the productivity – and profitability – of manufacturing' (Leopold, 1992: 103). Given these discrepancies in production techniques, differences between menswear and womenswear became further accentuated.

As we have already seen, womenswear and menswear were increasingly drifting apart in terms of their emphasis on elaboration and standardisation. The previous chapter highlighted the importance of standardisation in the development of mass production; therefore, it is not surprising to see that menswear underwent the move towards factory production much earlier than womenswear, because

... being more uniform and standardised and free from fashion's quirks and changes, men's clothing lent itself much more readily than women's to factory production with its dominant benefits of bulk cutting, long runs, and mechanisation. (Ewing, 1997: 49–50)

While Fine and Leopold (1993) suggest that mass production of ready-made clothing for men in the US appeared round about 1850, there was a considerable time lag before British womenswear manufacturers achieved a significant degree of

mechanisation, which was related to the complex fashions of the time. Ewing (1997: 50), for example, points out that these complexities of women's fashion prevented its factory production until the First World War, while Rouse (1989: 249) believes that it was not until the 1920s, that 'large-scale mechanised production of good quality ready-to-wear fashion for women' in Britain took off. However, even then factory production did not reach all segments of womenswear. As Rouse (1989: 249) points out the fashion-sensitive, high-margin womenswear industry of London's East End relied on 'pre-industrial' forms of small-scale manufacturing for even longer.

Despite the earlier adoption of factory production in menswear, it must be pointed out that factory-based clothing production in the nineteenth century still relied on factory-based labour as well as the use of outworkers. Factory-production was thus not categorically different from small-scale manufacturing in terms of its production and labour processes. This was largely due to seasonal fluctuations in demand, which meant that clothing manufacturers 'found it cheaper to off-load at the peak demand to small workshops and out-workers than to have machinery idle at the slack seasons' (Beazley, 1973: 57). In the clothing industry, then as now, seasonal fluctuations in demand are transferred into production fluctuations because the changeability of fashion means that neither distributors nor producers want to hold excess stocks. Thus nineteenth century retail buyers and wholesalers, like their twenty-first century counterparts, not only preferred to place orders as close to the season as possible, but expected manufacturers to deliver repeat orders mid-season at one or two weeks' notice. These buying policies meant that working conditions for clothing workers in the nineteenth century swung from over-employment during the peak seasons to part-time or unemployment during periods of slack (Wray, 1957: 39). Owing to the essentially seasonal nature of clothing production, sweated labour was by no means confined to small traditional workshops, but was also employed to ensure economic stability within clothing factories. John Barran, a manufacturer from Leeds, was frequently accused of exploitation of his workforce (Morris, 1986: 116).<sup>16</sup> Thus, the coexistence of old and new labour and production systems is a central characteristic of clothing manufacturing even today – especially in fashion-sensitive branches of the industry.

The dual usage of factory-based and outwork labour forces in the large US clothing factories of the nineteenth century, shows that mechanisation is not necessarily a prerequisite for large-scale production. This evidence challenges two Fordist paradigms: the interrelationship between mass production and consumption, and the alleged importance of machinery in the achievement of mass production.

Although the industry itself had not reached maturity, factory-based production of menswear in the US preceded mechanisation.

The British clothing industry of the nineteenth century, on the other hand, was more fragmented than its US counterpart as it had reached organisational maturity before the introduction of the new sewing machine technology (Godley, 2001: 99). Nonetheless, by the 1850s, there were a number of large-scale menswear manufacturers cum retailers, such as Messrs M. & S. Hyam and John Barran in Leeds. Since rent, fuel and other overhead costs were much higher in London, these new clothing factories developed predominantly in provincial towns such as Manchester, Bristol, Newcastle, Liverpool and Leeds. By 1871, 58 clothing factories had been established in the provinces – most remarkable perhaps was the rapid rise of Leeds' clothing manufacturing industry which rocketed from 7 or 8 factories in 1881 to 54 in 1891 (Godley, 1998:127).

Viewed from a production perspective, the fragmentation of the British industry, with its reliance on a complex subcontracting network, may obscure the fact that some companies were highly capitalised (Sharpe, 1995: 211). This is exemplified by the ratio between 'indoor' workers (employed directly by a manufacturer and working on his premises) and 'outdoor' workers (working off the premises). Based on evidence from a government inspection in 1893, Bythell (1978: 71) shows that six of the largest clothing manufacturers in Bristol employed a total of 769 indoor workers and 2,000 outdoor workers with a ratio between indoor and outdoor workforces in the largest of these factories standing at 1:12. Thus, as in the US, factory production of menswear in Britain did not supersede older forms of manufacturing – small workshops and homeworkers continued to play a part in the production of men's clothing (Jefferys, 1954: 293).

Although menswear manufacturers still relied on outworkers to even out seasonal fluctuations in production, the more fashion-sensitive market of womenswear required even greater flexibility and adaptability from manufacturers.<sup>17</sup> We can therefore identify a number of differences between the two industries, for instance, in terms of their location and some of the techniques used for expansion.

First, while it was advantageous for menswear manufacturers to open larger factories in the provinces, the seasonal nature of womenswear made it necessary for manufacturers to stay within close proximity to their market. Consequently London continued to be the centre of womenswear manufacturing. For the small companies working in the fashion-sensitive sector of womenswear, a London location was particularly important since the wholesalers they were supplying expected speedy turnarounds of orders, which allowed them to 'keep their stock low... [and] in turn

reduced their vulnerability to changing fashion trends, and enabled them to respond rapidly to such changes' (Buglass, 1988: 16). Although menswear and womenswear were both affected by seasonal fluctuations the more stable seasonality of menswear in terms of fashion changes meant that fluctuations occurred with more predictable regularity and were altogether less violent. These differences were reflected in the geographical location of the industries – predominantly menswear in the provinces and womenswear in London.

This geographical split echoes Jones's (1971: 25) observations regarding the divergent development of the pre-finishing and finishing industries. The pre-finishing industries (e.g. textiles) lent themselves far better to the standardisation of products and techniques of mass production than the finishing industries (e.g. clothing manufacturing). After 1850, the bulk production of low-value goods was carried out in the provinces in pre-finishing industries that were power intensive but did not need much specialisation or a large labour force. Meanwhile, the industries that stayed in London were producing

... commodities of relatively high value and low bulk, involving a great deal of specialisation in warehousing and preparation for final manufacture, calling upon the services of many ancillary trades, and requiring large inputs of labour and small inputs of power. (Jones, 1971: 27)

In this way, London's industries obtained their 'pre-industrial' features and the capital became the centre for finishing goods (Jones, 1971: 26).

Although Jones treats clothing manufacturing as one homogeneous industry system, he also highlights the interconnectedness between the kind of products an industry produces and its specific set-up. This insight can be applied to the different developments of menswear and womenswear in terms of their organisational structure: menswear took on many of the features associated with pre-finishing industries, whereas womenswear adopted those features connected with finishing-industries. In order to clarify this point, it is important to draw attention to the dualistic nature of clothing, i.e. its utilitarian and non-utilitarian (cultural/social) dimensions. If fashion is interpreted as a reflection of contemporary cultural currents, garments with a high fashion-content may be seen as emphasising the non-utilitarian aspects of clothing, while more standardised garments emphasise clothing's utilitarian aspects. Seen in this light, the move towards standardisation in menswear emphasised its utilitarian function, for instance as uniforms for work, over and above any of its other roles.

This sobering-up process of menswear also had consequences for the organisational structure of menswear manufacturing in that it adopted some characteristics Jones (1971) associates with pre-finishing industries, for instance in terms of the scale of production and the increased standardisation of garments, which subsequently required less specialisation in terms of the workforce and auxiliary industries. Despite the fact that menswear was still labour-intensive, machinery was more widely adopted in menswear (and childrenswear) than womenswear. As Wray (1957) notes:

The main innovations in clothing machinery on which factory production has been based were in general use in the larger men's tailoring factories by the time of the 1914-18 war. But, apart from the basic sewing machine, these innovations were little used in the women's tailoring industry until the late 1920s and in the dress industry, until the 1930s. (Wray, 1957: 17-8)

The greater use of machinery in the production of menswear reinforced the relocation of manufacturers away from London because the fuel to power the machinery as well as the actual capital needed to set up large workrooms or factories was much cheaper in the provinces. The high overhead costs also prohibited the setting up of large workshops – let alone factories – by London's womenswear manufacturers, even when they prospered (Morris, 1986: 110). On the contrary, womenswear manufacturers employed only a bare minimum of workers directly and instead sought expansion through the use of homeworkers (Jones, 1971: 23). Investigating the clothing industry in London, Beatrice Potter found 'only 21 out of 1015 workshops that employed 25 or more hands, while 758 employed fewer than 10' in 1887-8 (Wilson and Taylor, 1989: 70).

A further reason why small-scale womenswear manufacturers dominated the industrial landscape well into the twentieth century was the greater complexity and changeability of women's fashion with its strong seasonal fluctuations. Manufacturers often feared that investments in larger work premises and machinery would not achieve the desired return because the volatility of the market presented the real risk that plants and tools would not be used to their full capacity for as much as four or five months of the year (Morris, 1986: 109). One can therefore question Zeitlin and Totterdill's (1989: 174) claim that it was the machines' limited flexibility that inhibited their adoption within the fashion-sensitive sector of clothing manufacturing and largely restricted their use to the more standardised production of menswear. On the contrary, as shown earlier, sewing machines increased the level of ornamentation of womenswear considerably and as such 'facilitated the closer approximation of ready-to-wear clothes to the complexity of hand-sewn clothing'

(Leopold, 1992: 105). This is an interesting point since even today the label 'hand-made' still evokes connotations of uniqueness and may better fulfil consumers' cravings for individuality and exclusivity - for example, the current success of designer labels and the public's continued high regard for haute couture designers.<sup>18</sup> As Fine and Leopold (1993: 110) put it: 'Haute couture dresses were presented as one-off style 'creations' that enhanced the originality and individuality of the consumer in a world of increasingly mass-produced goods.'

Thus, claims of uniqueness and exclusivity are particularly powerful when associated with goods within the 'arts and craft' realm, where notions of mass production and the use of machinery would damage the prevailing concept of the 'artist as genius', discussed in Chapter 1. And yet, labelling goods as 'hand-made' is only associated with uniqueness and exclusivity when those goods have been hand-produced by a third person: hand-made goods are therefore qualitatively different from home-made ones.<sup>19</sup> The former is associated with craftsmanship or artistic merit whereas the latter is often associated with poverty. Given this association of hand-sewn clothing with luxury and uniqueness it is perhaps not surprising that machines have been invented that can do 'hand' embroidery or produce slightly irregular stitching to provide the illusion that garments have been hand-made (Wilson, 1985: 85).

The above observations contradict Zeitlin and Totterdill's (1989: 174) claim that innovations in sewing technology restricted the flexibility of the production process to such an extent that they were unsuitable for use in the fashion-sensitive segment of womenswear manufacturing. Instead, in line with Leopold (1992: 105) and Fine and Leopold (1993: 102), it is suggested that the lack of investment in machinery was related to the seasonal fluctuations with which womenswear manufacturers were confronted. This claim is further substantiated by Godley (1998: 131-2) who argues that 'firms facing a highly volatile demand [had] little incentive to invest in expensive machinery that would lead to high fixed costs'.

In fact, Godley (1998: 132) suggests that there was no need for womenswear manufacturers to increase their scale of production because they could make a profit from repeat orders by subcontracting them to other companies. Thus, womenswear manufacturers almost exclusively achieved larger scale production through external rather than internal expansion; they subcontracted work to specialised auxiliary companies and outworkers rather than updating and scaling up their production plants or trying to increase productivity levels by investing in labour-saving machinery. The use of outwork in womenswear proved an effective way to combat competition from factories: it required little capital investment, saved overhead costs,

and the virtual isolation of outworkers in their homes or small workshops prevented them forming groups to protest against working conditions (Alexander, 1977: 81). Bythell (1978) suggests that:

... outwork was a means of achieving mass-production which often involved a minute subdivision of processes between different workers; but it differed from mass production in the factory by being labour-, rather than capital-, intensive. Essentially, it required a great deal of simple and repetitive work which called for only basic skills, unsophisticated tools, and minimal training: quantity rather than quality was the keynote of its needs for labour. (Bythell, 1978: 158)

Workers were called upon in times of demand and abandoned once their services were redundant – a practice used not only to expand and reduce a permanent workforce, but also as a means of replacing permanent workers with seasonal ones (Schmiechen, 1984: 59).<sup>20</sup> The relatively low level of skill required to obtain work within the section system and the great surplus of outworkers made labour not merely cheap, but disposable. In this respect, the essentially transitory nature of fashion was echoed in the working conditions of much of the industry's workforce.

The practice of subcontracting thus reduced economic risks for companies in volatile markets by spreading the risks associated with seasonal fluctuations and demand uncertainty among a number of agents; smaller workshops and outworkers often acted as a buffer between the principal company and demand fluctuations (Morris, 1986: 109).<sup>21</sup> Seasonal fluctuations in the London fashion trade were often so extreme that outdoor factories were only able to obtain work for approximately 30 weeks a year (Wray, 1957: 40). Indeed, the importance of outworkers in the stabilisation of clothing manufacturing was such that, as long as outworkers were plentiful, the practice of subcontracting was ideally suited for trades characterised by strong seasonal fluctuations, because it allowed manufacturers to operate with low stock- and inventory-levels and to off-load many of the losses, i.e. unused tools and empty workspaces, onto the outworkers (Bythell, 1978: 192).

This practice of diffusing risk through subcontracting is still prevalent in today's clothing manufacturing. For instance, the Italian clothing company Benetton combines technological innovations with this type of flexible labour arrangements. Although Benetton creates work for approximately 11,500 workers, it only directly employs 1,500 workers. One can detect the extent of their subcontracting network from the fact that none of their subcontractors employ more than 30–50 people (Murray, 1989:57). Based on these observations, one can draw the preliminary conclusion that the internal characteristics of the clothing systems largely determine

the most suitable forms of production and labour arrangements. Within market segments characterised by seasonal fluctuations, it was safer for manufacturers to forgo capital investments and to rely on fluid work arrangements, in the form of subcontracting and outwork, so that their companies remained small and flexible, while principal firms and wholesalers had the advantage of achieving 'the lowest production prices and the greatest flexibility with the least risk to themselves' (Buglass, 1988: 16).

This type of small-scale manufacturing proved to be the most efficient form of production within certain sectors of the industry. Comparing productivity levels, Godley (1998: 128-130) shows that London's East End manufacturers outperformed manufacturers in Leeds by 45 percent in 1935 and that, even by 1954, the East End clothing industry still showed higher productivity levels than other parts of the country. Company size in the fashion-sensitive womenswear market was in effect negatively correlated to efficiency since the mean size of clothing manufacturers in the East End was 'smaller than that for the UK as a whole' (Godley, 1998: 129). The economic success of small-scale manufacturers at this time challenges the commonly held assumption that large-scale factory production was associated with efficiency and progress; this is because differences in production and consumption needs governing various systems of provision have not always been taken into account. In an analysis of the fashion-sensitive sector of womenswear, Wray (1957) points out that:

... few production economies would have resulted from increasing the size of the factory ... for fashion production, the greater flexibility, its adaptability to fashion changes and the greater individuality of its products conferred a positive production advantage. (Wray, 1957: 32)

So it can be argued that mechanisation and new forms of production were not the decisive factors in the expansion of the ready-made womenswear clothing industry of the nineteenth century. Rather, the growth of the ready-to-wear clothing industry in London was based on sweated labour, which itself rested on subcontracting work to outworkers and the fragmentation of the garment production process; this, in turn, brought about the deskilling of the workforce. Although the system of subcontracting caused the vertical disintegration of the clothing industry (Hall, 1962: 55), it also gave rise to numerous subsidiary trades and specialised companies, which are vital to an industry that needs to achieve maximum flexibility. Jones (1971: 23) argues that such a system was particularly well suited to consumer goods or so-called finishing industries, because demand uncertainties and fashion

changes rendered the accumulation of stock economically unfeasible, and hence called for the kind of flexibility that could be best achieved through the use of outworkers.

Thus, manufacturers in volatile markets sought the flexibility of small-scale production in favour of strategies based on long-term planning and standardised production processes. In the light of these observations we can understand Leopold's (1992: 103) claim that certain sectors of the womenswear industry, i.e. those most susceptible to demand fluctuations, increasingly exhibited features opposed to the adaptation of mass production techniques. Thus, in contrast to developments in menswear which emphasised features associated with pre-finishing industries, changes in womenswear had the opposite effect. They strengthened womenswear's characteristics as a finishing industry and underlined its pre-industrial nature.

These observations show how, by the end of the nineteenth century, the fashion systems of menswear and womenswear had not only developed significant stylistic differences, but also structural and organisational ones; it was the type of clothing, i.e. its fashion-level, that determined which form of production was the most efficient. The next section concentrates on the development, structure and organisation of womenswear, highlighting how fashion systems consist of a number of subsystems that can be differentiated in terms of their fashion level - basic or high fashion. Some general transformations within womenswear in the early twentieth century are discussed, as well as the differences in the developments of basic garments versus clothing with a higher fashion content. These variations are shown to be similar to the differences between the development of menswear and womenswear just discussed.

### **3.3 Womenswear In The Twentieth Century**

#### **3.3.1 The consumption of womenswear in the 1920s: From consumer durable to perishable**

Womenswear has always been an important segment of the clothing market and it further increased its significance when it underwent dramatic changes at the beginning of the twentieth century. These changes can be related to women's entrance into the labour market and the subsequent increase in their income<sup>22</sup> as well as the cheapening of fashionable clothing – a combination of changes which helped to spread demand for ready-to-wear womenswear to wider sections of the female population, and increased the number of producers and manufacturers of womenswear (Godley, 1998: 131). However, unlike the demand for menswear, which was relatively stable and unaffected by fashion changes (and hence more

suitable to large-scale production), womenswear became increasingly fashion sensitive. These transformations turned clothing from a consumer durable to a perishable good characterised by its limited shelf life.

The First World War had a number of important implications for the development of womenswear. Although restrictions during the war did not directly interfere in the production of womenswear, fashion nonetheless changed considerably because women's widespread participation in the war effort increased the need for simpler, more practical garments (Lansdell, 1999: 24). While women's garments were fitted and restrictive in pre-war Edwardian times, war-time clothes afforded their wearers greater freedom of movement. The significant increase in working women accelerated the demand for ready-to-wear clothing – most women now had greater disposable income with which to buy clothing and less time to spare for home dressmaking. Dating these developments slightly earlier for the US market, Leopold (1992: 103) explains that the decade preceding the end of the First World War is commonly 'associated with the "evolution" of fashion, i.e., with the rise of the role of demand as an active and transforming agent on its own', while Rouse (1989: 261) places the transformation of womenswear in Britain slightly later, after the end of the war. Despite these slight discrepancies in timing, there were two important changes commonly associated with the new demand for ready-to-wear womenswear: the simplification of fashion, and the overall cheapening of garments which took off in the 1920s and transformed the face of womenswear forever.

Rouse (1989) describes the move from the overly ornate styles popular at the beginning of the century to altogether plainer women's fashion as having the following implications:

Styles such as the ... chemise dress ... were much easier and cheaper to manufacture than the tailor-mades – the very fitted and elaborate styles ... of the Edwardian period. They presented fewer technical problems for the manufacturer ... [and] they cost less to make. The tubular shape which became popular in the twenties reduced the problems for the manufacturer of sizing and fit ... [and] a wider range of women could wear them. (Rouse, 1989: 263)

To the alarm of the textile industry, these new dresses often required no more than one metre of fabric (Lansdell, 1999: 35) and thus the plainer styles of the 1920s were not only easier, but cheaper to produce and so more women could afford to buy them.<sup>23</sup> Not only did ready-to-wear garments become cheaper because they required less fabric, but fabric itself became cheaper due to the introduction and widespread diffusion of synthetic fibres, such as rayon, which was heralded as artificial silk

(Ewing, 1997: 88).<sup>24</sup> This development was of particular significance for the production and consumption of lower-price garments, since rayon was much better suited for making up into fashionable dresses than the cotton textiles used previously (Wray, 1957: 23). The introduction of cheaper textiles in the interwar years therefore stimulated consumer demand for clothing and encouraged women to expand their wardrobes (Jefferys, 1954: 332). The availability of cheap synthetic fibres such as rayon 'in effect facilitated a quantum leap in the production of mass-garments' (Fine and Leopold, 1993: 117) because it enabled womenswear manufacturers to produce cheaper items of basic clothing without having to implement technological changes to lower production costs.

Fine and Leopold (1993: 118) also stress the importance of 'separates' or 'coordinates' in this development. While dresses and suits, just like any other consumer durable, were major investments and expected to last for years – or until they had outlived their usefulness – the less pricey separates, i.e. jackets/trousers, and sweaters/blouses/skirts instead of suits and dresses, respectively, introduced the notion of 'obsolescence' in fashion and contributed to the acceleration of the fashion cycle: 'outdated replaced outworn as the primary stimulus for change' (Fine and Leopold, 1993: 118).<sup>25</sup>

The general cheapening of clothing introduced new possibilities for manufacturers in terms of product differentiation and market segmentation, based on variations in price rather than design. Womenswear manufacturers and retailers in the US used so-called 'price lines' to segment the market into distinct categories – as many as six in the interwar years – that allowed for 'a varying proportion of skilled labour to be applied to similar styles and fabrics' (Fine and Leopold, 1993: 115).<sup>26</sup> This practice enabled manufacturers to squeeze retailers' margins by manipulating designs to fit specific price categories; it also benefited retailers because it allowed them to carry fewer pieces in each category, with the added advantage of faster stock turnovers. Another important and wider-reaching implication associated with the introduction of price lines was the expansion of markets through the greater diversification of dresses on offer. According to Fine and Leopold (1993: 221), this practice was aimed at utilising 'the competitive advantage offered by small-batch production ... [and] would inevitably retard the move towards the mass production of standardised garments'. The availability of cheaper yet better quality synthetic fabrics also enabled UK womenswear manufacturers to produce low-price clothing ideally suited to cater for the increasingly more important consumer group of working-class women. Rouse (1989) observes that:

Working class women, particularly single ones, in employment had disposable income to spend on relatively cheap consumer goods. They were becoming more knowledgeable about fashion through mass-produced reading matter and would no longer be satisfied with cast-offs. They wanted attractive fashionable clothes to wear and, as they worked, the convenience of buying them off the peg. (Rouse, 1989: 268).

As early as the first decade of the twentieth century, working-class women, for the first time, could extend their concerns regarding clothing consumption beyond those related to price to include fashion and style (Fraser, 1981: 61). Factory-produced dresses had become so inexpensive that they were a mere fraction of the price charged by dressmakers, and often even cheaper than buying material to make them up at home ('Industrial Survey of the Lancashire Area' from 1932, cited by Wilson and Taylor, 1989: 93).<sup>27</sup> Nonetheless, other sources cited by Wilson and Taylor (1989: 96) suggest that home dressmaking was still of importance for some sections of working-class women.<sup>28</sup> Although the continuing practice of home dressmaking may reflect women's enjoyment in this activity, Wilson and Taylor (1989: 95) believe that, since ready-to-wear garments were of higher status than home-made ones, home dressmaking was probably a necessity rather than a hobby. This interpretation is supported by Burman (1994: 79) who, while emphasising the empowering qualities of home dressmaking for women, nonetheless concedes that home dressmaking was a means of attaining 'otherwise unaffordable fashion'. Home sewing was the only possible way for many working women to acquire the necessary clothing for their work (Burman, 1994: 72).

It is important to point out that the term 'fashionable' in this context is still ambivalent. Although more working-class women could at last follow fashion to some extent and were no longer forced to wear out their garments, the clothing described here is markedly different to high fashion. Although modern, it was relatively basic compared to the fashion system of fast-changing high-margin garments described later. The relatively basic nature of this type of clothing is highlighted by Phizacklea (1990: 35) who points out that with the main emphasis on price, fashion took second place.

While cheaper clothes enabled more women to participate in clothing consumption, the arrival of mass communication – in the form of magazines and films – during the interwar years also influenced consumption patterns and contributed to the speeding up of the fashion cycle. Looking at developments in the US, Fine and Leopold (1993: 109) note the intensification of womenswear's 'eccentricities' through mass communication, while they point out that it had the opposite effect on menswear.<sup>29</sup> They believe these discrepancies between menswear

and womenswear were due to the fact that, since menswear manufacturers had already established successful brands, they could achieve even greater market penetration by advertising their garments in the new mass media, making use of the improved transportation networks. These factors reinforced menswear's image of standardisation and mass production. In womenswear, on the other hand, Fine and Leopold maintain that a sharp increase in the influence of design could be noted – not only on the actual style of garments but on the overall market where a multitude of new products were introduced: outfits for cocktail parties, motoring and tennis. While mass communication aided the quick and widespread dissemination of the latest fashion trends throughout the US, an improved transportation system meant that the time lag between seeing a new fashion advertised and being able to buy it in one's local store was considerably shortened. Not surprisingly, the downside of speedy fashion diffusion and potentially greater market penetration of any given fashion was that it became

... increasingly difficult to extend the 'shelf-life' of any one fashion trend by off-loading on to customers from the less sophisticated hinterlands those styles that had already peaked in the metropolis or that had never 'taken off' there at all. (Fine and Leopold, 1993: 109)

From these observations, it can be seen that the evolution of fashion had brought fashionable clothing into the realm of affordability for a larger number of women. Although the consumption of fashion had spread to include sections of the working classes this has not given rise to 'mass fashion', or a homogeneous fashion system. On the contrary, the evolution of fashion had resulted in greater product differentiation and market segmentation, both in terms of the type/design of products and of the price range. It should be pointed out that the cheaper, more basic garments designed for the working-class market were not only different in terms of the materials used, e.g. rayon instead of silk, but also in the complexity of styles and consequently their fashion level. It was this 'combination of stylistic, technical and social changes' that facilitated the growth of factory-produced basic womenswear during the interwar period (Rouse, 1989: 261).

To conclude this section it can be argued that the evolution of fashion resulted in both the speeding up of the fashion cycle and the cheapening of clothing, which in turn reinforced differences within the ready-to-wear fashion system. The spread of ready-made womenswear created diversification and hence accentuated the various subsystems. One section of the industry was satisfying the demand for high-quality fashion garments; while another was catering for the high demand for less

fashionable medium or basic grades of clothing. This diversification of demand is reflected in the coexistence of various labour and production systems analysed in the following section.

### **3.3.2 The dualism of fashion manufacturing: coping with demand uncertainty in fashion-sensitive markets**

Womenswear was exposed to the paradox that, although mass communication increased consumer demand, it also served to destabilise the fashion cycle by speeding it up. As changes in fashion accelerated, manufacturers and distributors of womenswear, especially those catering for the fashion-sensitive market, had to react more quickly to emerging trends so as not to miss them altogether or be left with unsold garments; they were increasingly subjected to demand uncertainty. Although advertising, mass communication and entertainment 'contributed to a growing uniformity and standardisation of taste among the population as a whole' and fostered 'the desire to be attractively and fashionably dressed' (Rouse, 1989: 269, 270) it did not create a form of relatively stable demand that could be fulfilled only by mass-produced garments. On the contrary, the cheapening of garments, the new concept of perishable clothing and better communication and transport systems all contributed to demand uncertainty. Godley (1998), for example, observes that:

... within this growing total demand ... the expected demand for a specific model of a garment was very unpredictable. Thus, as the market for ready-made womenswear grew clothing entrepreneurs faced a highly uncertain latent demand. No single producer could be sure that the firm's designs would meet with acceptance. Given the huge variety of models that were possible by changing the combination of fabric and cut, no single manufacturer could hope to provide complete coverage. (Godley, 1998: 131)

This quote sums up the problem of demand uncertainty that manufacturers and retailers have been facing since the 'evolution' of fashion at the beginning of the twentieth century, and indirectly addresses the rise in product differentiation that became particularly pronounced during the interwar years (Leopold, 1992: 110). Product differentiation can be seen as a proactive competitive strategy employed by womenswear manufacturers to expand their market share and reduce risks associated with demand uncertainty. In his account of the womenswear manufacturing industry of London's East End between the 1880s and 1950s, Godley (1998) shows how manufacturers actively sought product differentiation as a means of gaining competitive advantages through specialisation into high-margin fashion-sensitive

niche markets.<sup>30</sup> Thus, well into the twentieth century the East End was characterised by a high concentration of specialised firms engaged in the production of a multitude of different garment styles that a smaller number of large manufacturers would have been incapable of producing.<sup>31</sup> Being split up into a multitude of small manufacturers made it possible for the East End womenswear industry to successfully exploit the 'economics of fashion-sensitive demand' (Godley, 1998: 125). Another important feature of these manufacturers was their great flexibility which was principally based on the fluidity of interfirm relationships; firms could easily fluctuate from contractor to subcontractor depending on the seasonal success of a company's clothing range. The closely knit network of companies and the overall high demand for womenswear meant that, even if manufacturers' own designs were unsuccessful, they could be fairly certain to obtain work from others. The specialisation of companies into certain niche markets thus 'led to a system with much more market co-ordination but with a strong element of mutual interdependence' (Godley, 1998: 133).

Demand uncertainty proved to be a powerful stimulus to workers and manufacturers building up their skills. In order to work in an environment that took advantage of small-batch production and changing product specifications, workers had to be highly skilled to avoid the delays and additional costs of retraining (Steedman and Wagner, 1989: 67).<sup>32</sup> For employers, the onus was to 'concentrate on finding market niches where the firm's speciality would give some guarantee of future income free from the uncertainty of subcontracted orders' (Godley, 1998: 132–3). Thus, the distinctive feature of the East End clothing industry that gave it a competitive edge over the newly emerging factories in other parts of the country was the amalgamation of a highly skilled workforce with manufacturers' efforts to find a unique position in the market.<sup>33</sup> In this way, their unique inter and intra firm arrangements secured the East End manufacturers' competitiveness over other forms of production, allowing them to forgo technological innovations. This fluidity also enabled them to combat increasing demand unpredictability by combining product differentiation with the ability to match supply with demand; manufacturers could respond quickly to newly emerging trends as well as to re-orders for successful garments – two features of paramount importance for companies operating in the high-fashion market.

This analysis of the structure of the womenswear industry in the interwar years demonstrates that small-scale manufacturers, particularly in London, continued to play an important part within womenswear manufacturing. This is confirmed by looking at data collected by the Board of Trade in 1942, indicating that 45 percent of the clothing industry workers were employed in firms with less than 100 employees

(Wray, 1957: 28). Unfortunately, there are no separate data available exclusively for the womenswear industry but, given the different developments of the menswear and womenswear industries, it is highly likely that the greater ratio of large-scale menswear companies biased the findings. Equally important, the data collected by the Board of Trade did not include any companies with less than 10 employees, which again is likely to have made the findings less relevant for the womenswear industry. Wray (1957: 28) suggests that many of the early twentieth-century homeworkers had become small manufacturers in the 1920s. She supports this claim by citing the membership figures of the Master Ladies' Tailors' organisation for the years 1920 and 1939: membership had increased from 250 to 750 companies (Wray, 1957: 29), while Godley (1998: 131) provides another example that highlights the continued importance of small-scale manufacturers in London by arguing that they produced no less than '50 per cent of [the entire] women's and girls' tailored outerwear and 48 per cent of [all] dresses, household overalls and blouses' in 1939.

Small-scale manufacturers, as well as homeworkers, continued to be significant to the industry although a combination of factors after the First World War reduced the actual number of homeworkers.<sup>34</sup> According to the census of 1924, the number of homeworkers employed by clothing manufacturers between 1907–24 dropped by about 50 percent, from 40,090 to 20,035 (Phizacklea, 1990: 28). Indeed, this trend was sustained during the interwar years, which led the Chief Factory Inspector's Report for the year 1932 (cited in Phizacklea, 1990: 29) to suggest that 'homeworker [had become] a thing of the past'. However, Phizacklea (1990: 29–30) questions the demise of the homemaker by pointing out that there had been a long tradition of underestimating their numbers and that consequently the apparent significant reduction in outwork has to be treated with some caution – especially as the unpredictability of demand for fashionable womenswear necessitated the use of a flexible workforce.

### **3.3.3 Mass demand and the rise of factory production in womenswear during the 1930s**

While increased demand uncertainty and the speeding up of the fashion cycle strengthened the position of small-scale manufacturers, the simplification of fashion that had begun during the First World War, and continued in the interwar years, sparked an increase in the demand for ready-made garments and opened up womenswear to the possibilities of mass-factory production. However, it was not merely the demand by civilians for simpler womenswear that had an impact on the industry; the techniques used to manufacture millions of uniforms during the First

World War greatly improved existing ready-to-wear tailoring methods for civilian clothing as well (Ewing, 1997: 86).<sup>35</sup> By the 1930s, the standard of ready-to-wear dresses had improved so significantly that Wray (1957: 26) suggests that middle-class women were persuaded to abandon their dressmakers in favour of ready-made clothing.<sup>36</sup> Given these advances, factory production became the normal production method of the womenswear industry (especially in tailoring) by the late 1920s. Thanks to increased technological innovations, even the most volatile sector of womenswear – dressmaking – had largely been converted to factory-based production by the 1930s (Wray, 1957: 22).

The spread of factory production was also accelerated by the labour shortages and regulations that arose during or shortly after the war. Although, as we have seen, the impact of these transformations was not sufficiently dramatic to completely eradicate the use of homeworkers, ‘the homeworker was gradually replaced by either the outdoor or indoor factory, as the economies of factory production began to outweigh the previous advantages of cheapness of homework’ (Wray, 1957: 19–20). While Wray’s argument that homeworkers have been replaced altogether by workshops or factories is questionable, she is right in maintaining that labour was no longer so cheap and plentiful that it deterred manufacturers from capital investments in labour-saving machinery and larger work premises. This observation is sustained by Phizacklea (1990: 29) who argues that these transformations ‘were likely to push the industry away from a complete reliance on cheap labour to an emphasis on raising the productivity of labour’. While the fact that the overall volume of ready-to-wear womenswear increased during the interwar years and that improved production methods and simplifications in fashion introduced new possibilities for factory production is not being disputed, the evidence from the previous section clearly suggests that the transformations within the industry at the time were fairly gradual. The coexistence of different labour and production systems reflects the heterogeneous nature of womenswear. Although home dressmaking and the bespoke trades lost much of their former significance within womenswear owing to the spread of ready-to-wear clothing, the nature of this newly predominant system was not at all consistent. Phizacklea (1990: 30–1) highlights this point by describing the industry’s ‘dualism’, which she believes developed between 1911 and the Second World War, as the co-existence of ‘the “modern” factory-based firm outside London using increasingly sectionalised methods of assembly alongside the traditional sweatshop sector with its retinue of homeworkers based in the inner cities’.

Thus, while womenswear manufacturing certainly underwent important changes in the interwar years, none of these transformations resulted in the complete

abolition of old labour and production systems. In fact, the overall increase in the volume of factory-produced womenswear hardly changed the production methods used. This can be demonstrated by looking at the spread of the whole-garment, sectional and conveyor-belt methods of production. Using data from the Board of Trade survey of 1942, Wilson and Taylor (1989: 101) show that even in the late 1930s, 50 percent of the 842 women's tailoring firms and 72 percent of the 807 dress, blouse and overall companies included in the survey were using the whole-garment method, while 40 percent and 18 percent, respectively, were employing sectional methods; only 1 percent and 2 percent of firms in each category were using the conveyor-belt method. In addition, Wray (1957: 41) maintains that there was little evidence that factories in the 1930s exploited advanced managerial techniques commonly associated with mass production. She argues that the pre-Second World War womenswear industry was in transition from craft to factory production, and that the production methods even in the handful of large factories 'were mainly based on the skill of the individual operatives' and not on production engineering techniques typical of Fordist factory production (Wray, 1957: 278). For this reason, she insists that, as late as 1939, the womenswear industry kept many features of handicraft methods (Wray, 1957: 15).

In line with the limited changes in production methods, the technological advances of the early twentieth century had little impact on clothing production which continued to be dominated by the individually operated sewing machine (Leopold, 1992: 104). Although technological innovations had helped to speed up the production process, they did not sever the 'one-to-one link' between worker and garment (Leopold, 1992: 105). More sophisticated machinery neither eliminated any tasks nor enabled work on more than one garment at the time – the obvious exception being the nineteenth-century improvements in garment cutting. There were only three main areas of innovation in sewing technology from the late nineteenth century to the 1970s: 'increased stitching speeds and machine durability; the development of work aids such as needle positioners and underbed trimmers; and the emergence of dedicated machines for special tasks' (Zeitlin and Totterdill, 1989: 174).

These observations demonstrate how factory production in the interwar years failed to revolutionise clothing manufacturing as such. It is fair to conclude that, on closer scrutiny, the changes that the industry underwent in the interwar years are less dramatic than often assumed. Moreover, the strong evidence of co-existing labour and production systems within womenswear manufacturing are proof of the heterogeneous nature of the womenswear fashion system as it has been shown to encompass a number of subsystems.

### **3.3.4 From the 'sobering-up' to the 're-emergence' of fashion: womenswear in the 1940s and 1950s**

As we have seen, factory production was introduced to womenswear manufacturing much later than to menswear – and then only in part. However, with the beginning of the Second World War, supply and demand for women's clothing changed, bringing a knock-on effect to the structure of the womenswear industry. As in the First World War, these changes were based to some extent on military requirements – the demand for a great number of uniforms for men and women. This demand fuelled mass production techniques that took over a significant part of the industry and that were later extended to include the production of civilian clothing (Wilson and Taylor, 1989: 119–20). The mass production of civilian clothing was promoted through the introduction of the so-called 'Utility Scheme' in June 1941, which 'set standards of design for household items ... as well as clothing' (Wilson, 1985: 80). At its height, the Utility Scheme regulated about 85 percent of the manufacture of civilian clothing at consumption and production level (Wilson and Taylor, 1989: 119); consumption was regulated by limiting the variety of styles and clothes rationing was introduced to limit production. However, the scheme also set standards with regard to the making up of clothing. For example, manufacturers had to adhere to minimal seam and hem allowances and forgo all trimmings, using as little labour and material as possible. This objective was certainly reflected in the clothing of the time: 'dresses were narrow and ended just below the knee ... the skirts were allowed two pleats in front and one at the back' (Lansdell, 1999: 63–4). War-time clothing was influenced by the styling of military uniforms which contributed to its heavily tailored look (Wilson and Taylor, 1989: 111). This is not to say that the garments were unattractive – in fact, a number of famous British designers had been commissioned in 1941 to design a range of prototype utility clothes for mass production. Although utility clothes were available in different grades, from couture to mass production, it goes without saying that the craftsmanship varied significantly between these levels. While the designer prototypes received a very complimentary write-up in the fashion press, it is highly unlikely that the average woman buying a much cheaper version of the same style would have been as favourably impressed.

The scheme was devised to promote well-designed clothes for the whole population but its main objective was to achieve the greatest possible production efficiency (Wilson and Taylor, 1989: 125). The Utility Scheme controlled the making-up of garments as well as the actual number of styles a manufacturer was allowed to produce per year. These regulations enabled long production runs that

were further encouraged by the Board of Trade's 1942 powers to control cloth supply. The control of supply also led to the Board's power over prices 'at each stage of the production and distribution ... and [its ability to set] ceiling prices... for each type of garment' (Wilson and Taylor, 1989: 118–19). Manufacturers were only allowed to charge a maximum of 5 percent over their production costs. Ewing (1997: 146–7) makes the important point that many of the characteristics associated with modern clothing factories – production planning, the widespread use of sectional methods of production as well as the introduction of trained managers and technicians – have arisen out of war-time restrictions that taught manufacturers how to plan their production, and allocate costs and resources efficiently.

Not surprisingly, the government's restrictions on cloths and the style and variety of finished garments combined with the overall scarcity of clothing encouraged consumers to buy basic, non-fashion, garments 'which would not easily "date" when worn for several years' (Wray, 1957: 46). Once again, quality rather than style were of importance since clothes had to potentially last many years. So, under the Utility Scheme, various forms of quality control were introduced to test both the standard of the finished garments as well as the fabrics used in making them up (Wilson and Taylor, 1989: 118). By significantly reducing the impact of fashion on womenswear, i.e. by sacrificing its ornamental features to its utilitarian ones, women's clothing was subjected to a kind of 'sobering-up', which realigned the fashion systems of menswear and womenswear once again. For the first time, the simpler styles of the 1940s meant that wide sections of womenswear were as suitable for mass production as menswear – indeed, as we have seen, long production runs of both fabrics and garments were positively encouraged by government restrictions. Just how significant these government interventions were in the transformation of the womenswear industry during the war and in the immediate post-war years can be seen in Wray's (1957: 69) claim that they were the 'basic cause of the replacement of craft skills by production engineering techniques'. She points out that it was these 'institutional factors' that prevented fashion changes for many years and in so doing facilitated the standardisation of womenswear while at the same time encouraging the growth of mass markets.

The latter development was helped by the scarcity and rationing of clothes that concentrated consumer demand and removed the risks normally associated with womenswear manufacturing, namely seasonal fluctuations and demand uncertainty caused by fashion changes (Wray, 1957: 49). Although commenting on the US clothing industry, the observations of Disher (1947) capture the transformations experienced by the British industry equally well:

... before the war the ... industry was in a constant state of instability. Rapid style changes were an evil which was not the consumer's fault. It was the industry's own making through its eagerness to create new business and it took a heavy toll of bankruptcy to prove that an endless variety of style does not necessarily increase total purchases. But the war time demand for quality rather than variety gave the industry its chance to develop and become prosperous. (Disher, 1947 cited in Ewing, 1997: 153)

Thus, the curtailment of demand and supply through the Utility Scheme eliminated the fluctuations and uncertainty in demand from clothing production and helped to stabilise the industry. Womenswear manufacturers were freed from the necessity of keeping up a production system of 'flexible supply' because they were now assured of finding a market for their goods and could concentrate their efforts 'on technical production problems' (Beazley, 1973: 56); they could focus on production engineering, as well as marketing. All this brought stability to the industry and changed the balance of power between manufacturers and distributors. The buyers' market had become a sellers' market (Wray (1957: 44).<sup>37</sup>

Another, perhaps even more significant, factor contributing to the stabilisation of the clothing industry was the introduction of the so-called Designation Scheme in 1941, which was converted into the Concentration Scheme in 1943–4 (Wray, 1957: 46). These schemes were designed to make best use of valuable labour power and factory space and thus only certain manufacturers, i.e. those who reserved a minimum of 75 percent of their production capacity for government contracts, were allowed to continue with the production of clothing. Wilson and Taylor (1989: 119) highlight three main effects of these regulations: (i) many low-quality producers went out of business; (ii) other companies were forced into mergers; and (iii) it was difficult for new companies to break into the market since companies with less than 25 employees were generally refused the so-called Designation Certificate (Wray, 1957: 47). Although these schemes encouraged the set-up of larger production units, they did not eradicate all small-scale producers – as shown later, the small fashion producers in London prospered during the war. In fact, many small undesignated companies survived the war either independently or as subcontractors for principal, i.e. designated, firms. Figures cited by Ewing (1997: 228) indicate that 40 percent of all 12,000 clothing manufacturing companies in 1948 employed less than 10 workers.

Although it was not altogether impossible for companies to continue production without 'government approval', a Designation Certificate certainly offered manufacturers great advantages. They were able to secure priority cloth supplies for utility clothes and their workers were 'classified under Essential Workers

Orders – they could neither leave their jobs nor be dismissed’ (Wilson and Taylor, 1989: 120). In addition, apart from a few exceptions, these workers were exempted from call-up. The establishment of larger factories improved clothing workers’ wages and conditions of employment. The relative labour scarcity had the additional benefit of strengthening the position of subcontractors because many of these small companies employed foreign labourers and/or others excluded from conscription. Principal firms thus no longer saw subcontractors as disposable labour, but as valuable assets that enabled them to extend and adjust the scale of their production.

With the end of the war, restrictions on clothing manufacturing began to be lifted, although rationing continued until March 1949 and the Utility Scheme was only abandoned in 1952. Wray (1957: 53) argues that although the scheme had been welcomed by the majority of clothing manufacturers during the war, the end of clothes rationing in 1946 put manufacturers once again in direct competition with each other; by and large, they felt that the continuation of the scheme brought them more disadvantages than advantages. This was because the competition for cloth caused an imbalance by favouring larger producers and had split post-war womenswear manufacturers into two groups: those who produced utility garments and others who made ‘general’ clothes. The former group produced fairly plain and standardised garments in long production runs, while the scale of production of the latter was much smaller and more diverse in style. The two types of garments differed significantly in price, a fact aggravated by the large increase in purchase tax on non-utilitarian cloth in 1947 (Wray, 1957: 53).

Nonetheless, the combination of continually strong consumer demand for clothing and the absence of new entrants in the market meant that most womenswear manufacturers were able to prolong their period of prosperity at least until 1950. Amongst those who had fared particularly well in the immediate post-war era were the small fashion manufacturers of London. The reasons for their particular success lay once again in their structure: not only had they gained beneficial effects from their high concentration in a certain area, but the small size of the companies and the fact that many of them employed foreign workers had made them less sensitive to government interventions during the war, enabling them to continue the production of civilian clothing. Moreover, the way these manufacturers specialised in the fashion market meant that, though affected to a certain extent by utility restrictions, their war-time products had retained much of their style and hence enjoyed great popularity. London fashion manufacturers were thus able to retain their market share and frequently increase it.

However, despite the success of this group of manufacturers, their inner-city location hindered their expansions into larger premises just as it had hindered their nineteenth-century predecessors. Consequently, many London manufacturers moved to the government designated Development Areas as early as 1946, followed by a second move between 1948–50. These areas combined the advantages of a large supply of ‘green’ labourers with purpose-built factories, available on a rent basis: ‘it is in these larger factories ... that the biggest innovations in production technique have been made’ (Wray, 1957: 57). These factories could be equipped with the latest machinery and their layout enabled manufacturers to organise production in such a way as to incorporate the latest advances in the sectional system of production: the ‘conveyor belt and “synchro-flow/progressive bundle”’ systems (Wray, 1957: 186). The sectional system of clothing production allowed manufacturers to implement mass production techniques and to take full advantage of available sources of labour since it speeded up the training of unskilled labourers.<sup>38</sup> Moreover, the fact that these workers were new to the clothing industry certainly made it much easier for manufacturers to introduce these new production techniques; the breakdown of skilled work into its component parts, which not only decreased wages but contributed significantly to the interchangeability of workers, would have been more strongly resisted by workers in the traditional clothing centres. These new factories in the Development Areas were the technologically most advanced companies in the womenswear industry, exhibiting many of the features associated with Fordist mass-production units – they took full advantage of large-scale production runs and ‘the skill of the operative had been replaced by production engineering and managerial skills’ (Wray, 1957: 188). However, not all branches of womenswear were equally suited to this kind of production; it was more appropriate for the dressmaking than the tailoring segment of the industry since dressmaking could be carried out with section production and required a less skilled workforce (Wray, 1957: 228).

While the 1940s womenswear industry was a sellers’ market, the industry quickly reverted to its ‘normal’, pre-war, manufacturing and trading conditions in the 1950s, which caused the return of demand and market instability and the buyers’ market, which is so typical of this industry. Thus, the 1950s saw the re-emergence of fashion despite the fact that for the clothing industry this decade had got off to a bad start. Higher clothing prices, caused by increased costs of cloth, dampened consumer spending on clothing in comparison to other consumer goods (Rouse, 1989: 279), and ended the clothing industry’s post-war boom of 1950–1. By 1952, consumer spending on clothing was rising once again. Wilson (1985: 82) relates this renewed interest in fashion to the overall improved standards of living, i.e. the birth of the

'affluent society', which indicates that people had more disposable income to spend on non-necessities.<sup>39</sup> In addition, the 1950s saw the emergence of a new consumer group – teenagers – who spent a fair proportion of their disposable income on consumer goods such as clothing.<sup>40</sup> Although, in general, consumer spending had increased in post-war Britain, shifts in demand made consumer choices less predictable – a fact certainly related to a general increase in fashion knowledge. Wray (1957: 58 and 280) maintains that this period saw the spread of fashion into areas and markets previously 'unaffected' by it, such as low-price garments and the older and 'outsize' market.<sup>41</sup>

While garments in the 1940s had drawn on a fairly small, standardised number of styles and cloths, manufacturers in the 1950s swamped the market with an oversupply of different styles. Although these developments greatly benefited retail buyers and private customers who, in comparison to the austerity of the war years, were literally spoiled for choice, it undermined large manufacturers' previously strong market position who were once again faced with the uncertainty of finding markets for their products and of coping with seasonal fluctuations in demand.

Given the return of clothing's pre-Second World War characteristics of demand uncertainty and seasonality one can appreciate that the industry began to revert to many of its old structures in the 1950s. Large scale factories, which had been so successful in satisfying clothing demand in the previous decade, were forced to adapt their output to include smaller orders, often of more fashion-sensitive garments.<sup>42</sup> As the set-up of their indoor facilities made the production of small garment runs and/or batches of more ornate, fashionable clothing economically unviable, these types of orders were subcontracted to smaller outdoor companies, which predominantly used the whole-garment method (Rouse, 1989: 279).

Again, we can see that fashion-sensitive sections of womenswear necessitate a form of production flexibility which can be best fulfilled in the form of subcontracting relationships: 'primary firms, whether they remained in the traditional sites of production or not relied on subcontracting to meet fluctuations in demand' (Phizacklea, 1990: 33). This is also reflected in the census of production figures for 1951 (cited in Wray, 1957: 66), which show that outdoor companies continued to be of great importance in womenswear manufacturing.

The above evidence indicates that although the Concentration Scheme and manufacturers' move to Development Areas have resulted in a decrease in the fragmentation of the womenswear manufacturing industry and have facilitated the establishment of a greater number of large-scale manufacturers, the 'dualism' that characterised the structure of interwar womenswear manufacturing was still apparent

in the post-war industry. On the one hand, we find confirmation of the successful introduction of sectional production techniques and long stable production runs of fairly standardised garments; on the other hand, we can observe the continued importance of pre-industrial forms of production and labour arrangements.

This assessment of the structure of the post-war womenswear industry can also be substantiated by looking at the number of homeworkers, which had declined during the war but started to increase in 1950s Britain. Between the late 1950s and 1964, the industry encompassed as many as 15,000 homeworkers (Wilson, 1985: 82). According to Phizacklea (1990: 35) 'the system of subcontracting developed in London in the nineteenth century, remained intact in the 1950s, and has continued to supply the flexibility in production necessitated by unpredictable fashion demand.'

Thus, despite significant changes in the fashion industry, Marx's prediction that the sewing machine and other technological advances would 'tame' fashion and abolish seasonal work has still not become reality. Technological innovations and the expansion of factory production to some sectors of the industry failed to limit the reliance of manufacturers of fashion-sensitive clothing on subcontracting and the use of homeworkers; this was because the seasonal nature of this type of clothing made (and makes) it 'cheaper for many of the bigger manufacturers to off-load work at peak periods rather than have spare capacity in their factories for the rest of the year' (Wilson, 1985: 76). Looking at 1950s womenswear manufacturing as a whole, it is clear that old and new labour and production systems continued to co-exist, thereby satisfying the dual trends of re-emerging fashion consciousness and the spread of standardisation.

### **3.3.5 Price wars and global competition: the crisis of clothing manufacturing in Britain from the 1960s to the present day**

The discussion in the previous section showed that, despite the restructuring of some of its sectors and the spread of new production technology, when it entered the second half of the twentieth century, the clothing manufacturing industry still exhibited many pre-industrial features. The re-emerged instability of the industry's trading conditions meant that the capital-intensive large-scale manufacturers were particularly sensitive to seasonal fluctuations and periods of slack. In addition, the set-up of these factories meant that their customer base was fairly small in terms of numbers since it was limited to multiple retailers. In contrast, smaller manufacturers were traditionally better suited to cope with changes in demand, both in terms of style and scale of output. In the 1940s and 1950s, trading conditions had favoured large manufacturers while simultaneously providing good business for small companies; in

the 1960s, large manufacturers were faced with a new crisis in the form of competition from low-wage countries.

In order to understand why low-wages pose a serious threat to technologically advanced manufacturers, it is important to appreciate that, despite all the innovations in clothing machinery, the industry – to this day – is highly labour intensive. Indeed, it remains one of the few labour intensive industries in the UK, whose products often

... have to be individually finished and so hand assembly by a skilled workforce is vital. Consequently, even with the relatively low wage paid by the industry compared with other manufacturing sectors, the industry's British workforce is vulnerable to the cheaper labour costs in emerging economies. (*Key Note*, 1998: 18)

If one looks at the ratio of time a worker spends on handling as opposed to machining garments – according to Fine and Leopold (1993: 105, drawing on Lamphere, 1979), 80 percent of a machinist's time was spent handling garments in the 1970s – it becomes clear that costs saved through technological innovations designed to save time spent in machining garments are less significant than those saved through low wages. Bruce and Hines (2001: 18) argue that many elements within clothing manufacturing cannot be mechanised and subsequently the significance of low labour cost within clothing manufacturing is likely to continue. Leopold (1992) makes the valuable point that the clothing manufacturing industry has not suffered the same kind of 'technological unemployment' experienced by other manufacturing industries that introduced machinery into the production process, and that

... the development of machinery in the clothing industry neither displaced labour ... nor stripped it completely of its skills. Such transformations as did occur from the hand-sewing to the manufacturing of clothes was based on the mechanisation of tailoring practices rather than the wholesale transfer of the production process to machinery. (Leopold, 1992: 104)

Given the continued centrality of manual labour in the clothing manufacturing industry, one can appreciate that the UK and other advanced economic countries are very vulnerable to competition from low-wage countries. Not surprisingly, therefore, from the 1960s onwards, clothing manufacturers in the UK faced tough competition from countries on the 'periphery of Fordism', such as India, Taiwan and the Philippines, whose low wages and weak unions provided 'ideal' conditions for the manufacture of low-priced garments.<sup>43</sup>

Foreign competition from low-wage countries had a particularly devastating effect on large-scale manufacturers since their fairly standardised products could be

easily ordered months in advance, and hence retailers sought to gain price advantages by switching their sourcing policy for bulk orders overseas. The dual pressure from low-wage competitors and retailers' changed sourcing strategies meant that high-volume clothing production in the UK was only economically viable for a fairly short time before it became internationally uncompetitive – which threw the industry into a prolonged period of decline and restructuring that continues today.

Many large clothing manufacturers in advanced economic countries sought to combat their declining international competitiveness by exploiting 'cheap and usually illegal immigrant labour in the home nation' (Godley, 1998: 126). Another solution was to move some of their production off-shore, both by establishing manufacturing plants in developing countries as well as by expanding their subcontracting network to include overseas subcontractors, thereby taking advantage of the conditions found in developing countries.<sup>44</sup> Phizacklea (1990: 41) points out that this 'if you can't beat them join them' strategy was adopted by many of the vertically integrated textile manufacturing companies, such as Courtaulds and Coats Viyella, as well as some of the larger independent manufacturers. Although more efficient transportation systems at first enabled contractors to widen their subcontracting network to include other areas in Britain (e.g. the Midlands from the 1970s onwards), spatial boundaries were being continually extended to include many overseas firms (Phizacklea, 1990: 35).

Large-scale manufacturers who pursued the high-volume low to medium end of the market suffered great losses; smaller manufacturers targeting the higher quality and/or fashion-sensitive market were less affected by retailers' changed sourcing policies and foreign competition.<sup>45</sup> Moving upmarket and targeting more design-intensive market sectors is a successful policy in warding off competition from low-cost producers (de la Torre, 1986: 90). Also, 'by investing heavily in a product differentiation strategy that includes a fashionable branded product line ... a firm can compete successfully at premium prices' (de la Torre, 1986: 117). There are a number of reasons why niche-market manufacturers have been less affected by the impact of foreign competition on the UK clothing industry. First, the mid to top end of the market is far less price-sensitive (Steedman and Wagner, 1989: 54); thus, design and craftsmanship are more important here.<sup>46</sup> This shift in emphasis from price to design is reflected in the changes within consumer and retailing demand, which became more fragmented and lifestyle orientated. For instance, the 1960s saw the rise of a new retailing concept, the boutique, which was aimed at the young fashion-conscious customer. The high fashion content of these clothes meant that they became truly disposable – they were neither bought for durability nor expected to last: 'in an era of nearly full employment in the 1960s no one would any longer

admit to needing 'durable' or 'economical' clothes. For the youth market at least, clothes were made to be worn for a few months only' (Wilson and Taylor, 1989: 188).

In the 1960s and 1970s there was also a fragmentation of fashion in that various styles existed simultaneously within different social groups (Wilson and Taylor, 1989: 193). Thus, instead of there being one dominant fashion that spread through different social groups in varying qualities and adaptations, from about the mid-1960s onwards, one can observe a rise of more distinctly different styles and niche markets within the youth market at large.

A second reason why niche-market manufacturers have been less affected by foreign competition lies in the fashion sensitivity of their products. Retailers catering for the young and fashion-sensitive market were deterred from placing orders with off-shore manufacturers because the speed and flexibility of home manufacturers outweighed all cost advantages. However, changes within the last decade, such as cheaper long-haul airfreight costs and new vacuum packaging techniques (*Key Note*, 1998: 14), not only reduced import costs but also the time lapse between the placement of an order and the arrival of the products. Whereas, observers of the industry at the end of the 1980s argued that delays in sea transportation were too great to warrant overseas imports of more fashion-sensitive garments (Steedman and Wagner, 1989: 66), in the late 1990s changes in transportation costs made it economical for retailers to source not only basic, but also time- and fashion-sensitive, garments from overseas suppliers. In addition to improvements in transportation, there have been significant advances in communication and production technologies, which have also contributed to diminishing spatial barriers. These developments have therefore not only challenged the position of UK clothing manufacturers specialising in low-cost standardised clothing, but also have implications for producers of more fashionable garments. There are indications that smaller UK manufacturers could achieve greater cost efficiency and thus increase their competitiveness by using 'old methods of manufacture and [reviving] the use of widely scattered outworkers and small subcontractors' (Ewing, 1997: 205). Surveying the clothing industry of the 1980s, Phizacklea (1990: 10) relates the continuation and relative success of fashionwear production in Britain to the strong presence of entrepreneurs and workers from ethnic minorities because, once again, manufacturers were able to exploit these domestic sources of cheap labour and 'off-loaded their high-risk, unpredictable sectors of demand (fashion clothes), and maintained flexibility by increased subcontracting domestically' (Phizacklea, 1990: 120). In this light, we can understand Phizacklea's claim that the women's fashionwear industry has changed

little over the past 150 years since ‘the economics of the production of cheap fashion clothing’ themselves have more or less stayed the same (Phizacklea, 1990: 22).

Although foreign competition and off-shore sourcing had a worse affect on large-scale manufacturers than any other segment of the womenswear manufacturing industry, the knock-on effect was felt throughout the industry. Zeitlin and Totterdill (1989: 155) maintain that there was a sharp decline in employment in the industry between 1971 and 1984 when 126,000 jobs – the equivalent of 43 percent of the sector’s total employment – were lost.<sup>47</sup> The perhaps most dramatic period of those years was between 1979-83, when clothing manufacturing in Britain was transformed into a ‘sunset’ industry (Phizacklea, 1990: 9). The Labour government in the late 1970s encouraged investments in the home industry and successfully raised exports by 300 percent from 1978–9, but the Conservatives’ rise to power in the early 1980s with the subsequent increase of VAT from 8 to 15 percent had a devastating impact on the industry (Wilson, 1989: 83). For example, in response to this increase in VAT, Marks & Spencer significantly cut their prices by a total of about £17 million – expecting their suppliers to bear half of these costs (Wilson and Taylor, 1989: 216).

Apart from contributing to higher domestic labour costs, the increase in VAT further underlined the disadvantages for continued volume sourcing or mass production within the UK. As the employment figures in the UK declined, domestic output fell and there was a dramatic rise in imports (Zeitlin and Totterdill, 1989: 155); this left a trade deficit of £1.2 billion in 1986. The number of companies in the sector decreased from 7,000 in the 1970s to only 5,000 in 1983, and the average size of the remaining companies was considerably smaller than before – an outcome that Wilson (1985: 83) attributes to the re-emergence of the sweatshop and small manufacturers.

The general decline of the industry and the trend towards downsizing has continued over the last 20 years. In 1998, *Key Note* reported that the clothing industry in the UK consisted of a mixture of small, medium and large-scale companies (*Key Note*, 1998: 19). Three years later, in 2001, *CAPITB* observed a trend towards down-scaling in company size within clothing manufacturing whereby 99 percent of clothing manufacturers were small or medium enterprises (SMEs) (*CAPITB*, 2001: 8).<sup>48</sup> In fact, a large percentage of these SMEs were so-called ‘micro-businesses’, i.e. companies with less than 10 employees.<sup>49</sup> The large number of micro-businesses meant that the fall in employment was much higher than the number of companies in the sector – *CAPITB* shows that the former fell by 35 percent over the last decade, while the latter were only reduced by 10 percent over the same period (*CAPITB*, 2001: 12). In 2001, the clothing manufacturing industry in the UK consisted of 4,500

companies employing a total of 140,000 workers (*CAPITB*, 2001: 8). These statistics record a drop in employment for the sector by more than 250,000 workers in the period from 1973 to 2001 (*CAPITB*, 2001: 14).

## Summary

This chapter has shown that the clothing industry consists of a number of subsystems with distinct production and labour arrangements. Dividing clothing manufacturing into its component systems – menswear/womenswear, basic/fashionwear, etc. – has helped to explain the different developments of these various subsystems and the coexistence of divergent labour and production systems within the clothing manufacturing industry as a whole. By drawing attention to the internal differences between the various subsystems, i.e. in terms of their relative levels of standardisation and fashion sensitivity, it has been suggested that they adopt labour and production arrangements that best suit their specific needs.

The level of fashion sensitivity of a fashion system was shown to be of particular importance because it determines the impact of seasonal fluctuations and demand uncertainty that manufacturers have to face. As Wray (1957: 69) summarises ‘fashion can be regarded as a parameter, which defines the general conditions of production’. It has therefore been suggested that companies who are catering for a fashion-sensitive market adopt different production methods from those whose products are fairly standardised and stable. The argument that industry systems with high levels of demand uncertainties adopt specifically organised structures is reminiscent of the debate in Chapter 1 where it was shown that culture industries’ organisational structure of multi-layered selection stages has been designed to reduce risks.

Although this chapter has addressed production methods and their corresponding labour arrangements, instead of internal selection procedures in both cases it has been shown that demand uncertainties directly influence the structures of industry systems. The present chapter has traced the impact of demand uncertainties for example by sketching the divergences in the development between menswear and womenswear fashion systems in relation to the spread of factory production. It has been shown that the more stable market conditions of menswear have allowed manufactures to adopt this form of production by the beginning of the twentieth century (Wray, 1957: 17-8), while the spread of factory production in womenswear manufacturing occurred much later, namely during the 1940s.

Fashion-sensitivity has been related to seasonal fluctuations in demand and general conditions of demand uncertainty. As a result of the unpredictability inherent

in this trading environment companies have adopted a number of risk reduction strategies. Unpredictable consumer demand, for example, encourages manufacturers to seek competitive advantages through product differentiation, while it reinforces retailers' tendency to place orders as close to the season as possible. Unpredictability in demand also increases the desire of both manufacturers and retailers to run smaller orders that, if successful, can be quickly repeated with less risk to both parties. It is for this reason that the practice of subcontracting is still used in womenswear manufacturing today (e.g. Benetton).

The significance of demand uncertainty on the organisational structure of the womenswear manufacturing industry was further illustrated by its absence during the 1940s, when wartime restrictions brought stability to the industry, in turn transforming the 'buyers' into a 'sellers' market. As a result, womenswear manufacturers adopted many features associated with mass production: larger production plants, long production runs, a greater fragmentation of the manufacturing process through sectional production methods, as well as production engineering techniques.

However, with the resurfacing of fashion in the 1950s the pre-war trading conditions of seasonal fluctuations and demand uncertainties returned as well. This presented major obstacles for large scale womenswear manufactures who needed long production runs of fairly standardised clothing to exploit the economies of scale for which they had been originally designed. Not surprisingly, Leopold (1992: 102-3) points out that fashion changes and seasonal fluctuations continued to prevent the establishment of large-scale production of womenswear as its predominant production method. For him this is an indication of the limited extent to which technological changes, that have led to the implementation of Fordist production methods in other industries, have effected clothing production.

In the light of these observations one can conclude that womenswear – especially its fashion-sensitive sector – emphasises characteristics such as changeability, variety and novelty that are in direct opposition to Fordism. This does not mean that fashion-sensitive garments cannot be produced in large number. What it does suggest, however, is that large scale production of fast changing fashions may be achieved not so much by the creation of large highly mechanised production plants, but rather by employing old fashioned production and labour arrangements such as subcontracting and outwork. While the location of the subcontractor may have moved further away from the primary firm, i.e. to the periphery of Fordism, the realities of clothing production as such may only have changed a little. Though the discussion in Chapter 5 will demonstrate that reactivity to consumer demand and

fashion changes is of greater importance to fashion-forward companies than ever before, this chapter suggests that much of the greater level of flexibility of modern clothing manufacturers is not due to the implementation of the latest technology but rather the continued practice of employing a workforce that is cheap and flexible.

## Notes

1. Although the principal area of inquiry is the UK, the chapter also draw on examples from the US. Even though there are differences between the clothing industries of the UK and US, it is suggested that overall the internal differences between the various fashion systems and subsystems, i.e. menswear/womenswear or basic/fashion clothing, are greater than between the two countries. Hence, it is appropriate to draw on examples from outside the UK to support some of the claims in this chapter.
2. One has to draw a distinction between the fashion industry *in* Britain and *the British* fashion industry; the former refers to the manufacturers and retailers producing and trading on British soil, whereas the latter encompasses British-owned businesses in the UK and offshore. As we will see, this difference is an important one and is expected to continue to widen over the coming years (Jones, 2000: 183).
3. Fine and Leopold's definition of systems of provision shares some similarities with Peterson's (1976: 672) notion of 'production' and Becker's (1982: 1) description of 'art worlds' discussed in Chapter 1. Not only are the spheres of production and consumption interconnected in all three approaches, but Peterson, Becker and Fine and Leopold all take into account the intermediaries, i.e. the various distribution and circulation networks, that connect the producers with the consumers. While Becker refers to 'systems of distributors' Peterson, more specifically, refers to 'distribution, marketing, exhibition and evaluation'.
4. Leslie (2002: 62) argues that commodity chain analysis also lends itself to the investigation of class, racial, gender and spatial relationships contained within an individual commodity. Thus, in terms of the two latter aspects, the fashion commodity chain can be said to be highly feminised whereas, in terms of its spatial relations, one must distinguish between the local distribution and consumption of fashion and its (predominantly) global production. According to Gereffi (1994, paraphrased by Leslie and Reimer, 1999: 408), some chains are producer-driven while others are retail-driven. The examples he cites are cars and clothing, respectively.
5. Attempts were made to counteract plainness in men's fashion, examples being the beau (early eighteenth century), the macaroni in the 1760s and 1770s, the dandy of the early nineteenth century (Beau Brummell was the most famous exponent) and the aesthete of the late nineteenth century (Frazer, 1992: 182).
6. Victorian society, for instance, followed a strict etiquette for mourning which not only entailed a great expenditure on clothing for the surviving relatives but often saw the deceased better dressed in death than during life. The connection between clothing and respectability can also be seen from the fact that women often had worse clothes than their husband and children (Wilson and Taylor, 1989: 50) whose engagements outside the home necessitated the up-keep of sartorial respectability.
7. Although it is clear from the literature that neither 'ladies' nor working-class women consumed ready-to-wear clothing, it is less clear who the target consumer group of the first ready-made garments were. However, it can be suggested that by the 1860s ready-to-wear womenswear had improved in quality and the most likely customers for these clothes were middle-class women or well-off 'ladies' from the provinces who were unable to travel to London to use the services of a court dressmaker – the title 'court dressmaker' was used by the London fashion houses of the nineteenth and early twentieth century instead of the French term 'couturier' (Ewing, 1997: 32) – but who nonetheless wanted London chic which their local dressmaker was unable to supply.
8. According to Adburgham (1967: 123) the first wholesale mantel manufacturer opened in 1837 in London.

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9. There is evidence that some womenswear manufacturers were becoming more sophisticated in their sizing. Adburgham (1967: 128) cites the examples of two manufacturers who were supplying three different sizes by the 1860s.

10. Rouse (1989: 266) points out that British sizing was very basic until the 1930s, when a number of British manufacturers invited US experts to set up sizing and grading systems. However, body measurements, alongside our ideals of the 'perfect' body, change over time. Sizes based on outdated body measurements not only cause frustration to customers, but are obviously problematic for manufacturers and retailers as well. Consequently, some large British retailers, including Marks & Spencer, have recently completed a sizing survey – the first in more than 10 years – to improve the fit of their clothing (*The Sunday Times*, 21.03.99). There are also efforts to develop a 3D body scanning system which is hoped to revolutionise clothing manufacturing by introducing bespoke tailoring to large-scale clothing production. This technology and its implications for manufacturing, retailing and shopping, in particular in relation to internet shopping, is discussed in the next chapter.

11. However, compared to the UK, the US ready-to-wear clothing industry was relatively underdeveloped until the 1880s. Godley gives the following figures for the number of US clothing industry workers: 60,000 in 1860; 160,000 in 1880; 360,000 in 1900 and 500,000 in 1910 (Godley, 2001: 97–8). On the other hand, in the UK, the clothing industry already employed 625,600 people in 1861, of which approximately 150,800 were employed in London alone; the number only decreases slightly in the twentieth century: 586,900 in 1921 and 512,000 in 1951 (180,800 and 166,500 in London, respectively) (Hall, 1962: 39).

12. By the 1850s, average real incomes of the British working classes were increasing and demand for new, ready-to-wear clothing began to grow (Bythell, 1978: 196). There are contradictory estimates as to the number of working class men who could afford to buy new ready-to-wear clothing. While Elias Moses, the proprietor of Messrs Moses & Son of Aldgate, claimed that by 1860, 80 percent of the population bought ready-to-wear clothing (Hall, 1962: 54), Fraser's (1981: 59) calculations of working-class clothing expenditure in the nineteenth century indicate that only a small percentage of the working classes were able to purchase new clothes before the 1870s. Indeed,

13. Wilson and Taylor (1989: 35) point out that there had been a number of attempts not only to create, but also to patent a sewing machine. The earliest known patent was granted to Thomas Saint, a cabinet maker from London in 1790 (Beazley, 1973: 55). However, according to Burman (2002: 93), the 'parents' of the modern sewing machine are Howe's lock-stitch machine (1846) and Singer's Perpendicular Action Sewing Machine (1851).

14. This trend towards more elaborate yet faster-changing fashions was further helped by the availability of paper patterns, which first appeared in 1830. The first paper patterns were very complicated and costly and were therefore believed to have been used only by professional dressmakers (Rouse, 1989: 254). However, this soon changed and by the 1850s, i.e. at approximately the same time as the sewing machine revolutionised home clothing production, patterns were becoming more widely accessible; they were for instance included in women's magazines such as *World of Fashion*.

15. The production of nineteenth-century ready-to-wear clothing is generally associated with the sweating system which not only allowed for the 'cost effective' manufacturing of clothing by exploiting clothing workers, but also gave a great flexibility to clothing manufacturing while at the same time facilitating the mass manufacturing of garments. For a discussion of the sweating system and the relationship between the sewing machine and the sweating system, see Appendix A.

16. Barran is often credited with having been the first manufacturer to have installed a number of sewing machines in his factory. According to Fraser (1981: 177), Barran had approximately 20–30 sewing machines in his factory by the 1850s; in fact, he combined mass sewing with mass cutting through his invention of the band-knife in 1858.

17. According to the Working Party on Light Clothing Report (1947: 22, cited in Wray, 1957: 38–9), for example, workers in the dress and blouse industry of the interwar years only worked approximately 40 weeks a year, the remaining 12 weeks being spent working part time or in unemployment.

18. Indeed, we will see in Chapter 5 that the strive for uniqueness plays an important part for some sections of the high street retailing industry today.

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19. Burman (2002: 86), for instance, points out that home-made clothing was often associated with poverty, i.e. the inability to engage in ready-made clothing consumption, and hence wearers would take good care to hide the fact that the garment had not been bought in a shop.
20. According to Bythell (1978: 167), fluctuations in work patterns occurred both ways: women often sought work when their husbands were unemployed and abandoned their job once their spouses had found a new source of income.
21. The term 'principal' company refers to a clothing manufacturer who has his own indoor factory, but contracts work out to outdoor factories and/or homeworkers (Wray, 1957: 29).
22. Although Rouse (1989: 259–60) cites the example of a London-based invoice typist's annual income (£66 18s) and clothing budget (£5 9s 2d) for 1910 and thus maintains that the great majority of women at the beginning of the century could not afford to indulge in fashion and that the market for fashionable clothing was consequently restricted.
23. The fashions in clothes, hairstyle and make-up commonly associated with the 1920s first made their appearance in 1913 when Mrs Castle, a famous dancer, was spotted in them (Ewing, 1997: 78).
24. Rayon stockings, for instance, only cost a quarter of the price of silk stockings, while rayon jumpers were 50 percent cheaper than woollen ones (Wilson and Taylor, 1989: 97). Similarly, the widespread availability of nylon in the 1950s led to changes in consumer demand (Jefferys, 1954: 333).
25. Blouses and skirts were certainly not an invention of the 1920s, but date back to the late nineteenth century (Ewing, 1997: 21). Wilson and Taylor (1989: 46) claim that it was the fashion for skirts and blouses which spread ready-to-wear clothing to upper- and middle-class women. They also maintain that the simpler styling of these garments facilitated their mass production and subsequently reduced their prices so that they became a favourite with shop assistants, teachers, and so on. Nonetheless, the late nineteenth and early twentieth century skirts and blouses were tailored and overall more complex in their ornamentation than their later counterparts. Although Wilson and Taylor's observations contradict Fine and Leopold's claim that separates were introduced in the 1920s, it can be suggested that, owing to the even greater simplification and cheapening of fashion, prices for blouses and skirts fell significantly in this decade which subsequently increased consumer demand and pioneered the idea of obsolescence in clothing.
26. According to Ewing (1997: 128), this practice was also introduced to the British clothing industry in the interwar years.
27. While a large volume of womenswear was still produced by small dressmakers and tailors in 1924, figures supplied by the Chief Factory Inspector's Annual Reports a couple of years later, in 1926 and 1927, suggest that ready-to-wear clothing was considerably gaining in market share (Wray, 1957: 22).
28. Interviews with female mill and office workers from Bolton in 1939, for instance, revealed that seven out of eleven interviewees made their own clothing while the remainder was evenly split between those who bought ready-to-wear garments and those who obtained their clothing from a dressmaker.
29. As the discussion in the following section will show many of the developments in the US are equally applicable to change within the UK market.
30. In order to draw attention to the fact that demand uncertainty posed a significant problem for manufacturers and influenced their organisational structure, the emphasis in this section has been on manufacturers of high fashion garments. However, Wray (1957: 30) points out that womenswear manufacturers in London produced many different grades of clothing, from cheap to high quality, in small workshops – for reasons discussed earlier. Moreover, she maintains that even the more basic styles were of a higher fashion content in London than in the provinces. Thus, Godley's observations regarding high-margin manufacturers can be extended to include those catering for the less expensive grades.
31. Since East End manufacturers were small on average, their ability to exploit strategies of product differentiation independently was limited. Hence one can argue that their economic success undoubtedly depended to a large extent on their inter and intra firm arrangements, which resemble those of an industrial district, and which were characterised by the close proximity of a number of small 'mutually interdependent yet collectively competitive' (Godley, 1998: 133) companies. Seen in this light, one can understand Godley's (1998: 133) claim that the important variable for companies inside an industrial district is not size but co-ordination. Thus, given the market volatility with which

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East End womenswear manufacturers were faced, the internalisation strategies adopted by large-scale clothing manufacturers were not appropriate for their economic survival.

32. As we will see, this lack of skilled garment workers causes problems within the restructuring of the clothing manufacturing industry in the UK today.

33. However, it was not merely the combination of these internal characteristics of the industry, but also a number of external factors, such as the location of many specialised companies in the area, the large pool of skilled labourers as well as the closeness to buyers for the large womenswear retailers, that gave the industrial district of the East End 'the extraordinary flexibility needed to respond to the dictates of fashion and so to successfully target the high margin niches associated with fashion sensitive demand' (Godley, 1998: 133) and its competitive advantage over manufacturers in the provinces. Conversely, Godley (1998: 125) argues that the failure to recognise the importance of the internal and external characteristics of this industrial district led to the dispersion of manufacturing activities and contributed to the eventual decline of clothing manufacturing in the East End.

34. For instance, the existence of alternative employment options and stricter immigration laws since the First World War as well as the Trade Board Acts of 1919 and 1920 that have set minimum time and piece rate payments for all labourers, including homeworkers.

35. The 'coat frock' of the war and post-war period was the first women's fashion to be manufactured to a good standard using factory methods (Ewing, 1997: 88).

36. It was certainly not just improvements in quality which facilitated this move towards ready-to-wear clothing, but also social changes. Thus, Ewing (1997: 128) argues that the high unemployment and taxation rates limited the number of women who could still afford sartorial extravagances. In addition, it can be suggested that the speeding-up of the fashion cycle discussed previously changed women's attitude towards clothing: garments were no longer expected to last for years and subsequently their fashionability rather than purely their quality became of importance.

37. The war years saw an increase in manufacturers' branding and consumer advertising activities – practices formerly associated with only a handful of the highest quality producers (Wray, 1957: 50). Manufacturers' efforts to achieve brand recognition are an indicator for Wray (1957: 51) of the changing balance of power between manufacturers and distributors. Another indicator of the changed balance of power was the fact that manufacturers were in the habit of rationing their supply of non-Utility garments to retailers depending on the number of Utility garments they bought from them (Ewing, 1997:143). The importance of branding in womenswear is discussed in the following chapter.

38. However, since sectional methods of production require a certain simplicity and standardisation in the style and sizing of clothing it is not surprising that this kind of production technique was predominantly used in the production of lower medium and cheap quality garments, while manufacturers of upper medium quality garments continued to use the whole garment method of production in the 1950s (Wray, 1957: 280-1).

39. However, as Wilson and Taylor (1989: 184–5) maintain, there were still sections of the working classes excluded from the consumption of clothing and other consumer goods. In fact, for some people, second-hand shops or hire-purchase schemes remained important forms of clothing provision.

40. According to Wilson (1985: 82), this amounted to as much as 50 percent of all outerwear purchases in the second half of the 1960s.

41. There was another 'democratisation' of fashion through fabric in the 1950s. Not only had new synthetic fibres come onto the market but, through skilful marketing, the British Cotton Board reversed the dowdy image of cotton so that it appealed specifically to the younger generation of customers (Wilson and Taylor, 1989: 186).

42. These large dressmaking factories needed a minimum batch size of 1,000 dresses and ideally production runs of 3,000–5,000 dresses to achieve full production efficiency (Wray, 1957: 192). The scale of production that these factories were capable of ideally suited multiple retailers' placement of bulk orders and vice versa. The growing importance of multiple retailers within the womenswear industry thus influenced the structure of womenswear manufacturing. Multiple retailers' concentrated buying power and ability to place bulk orders also caused greater standardisation in womenswear and helped to spread principles of mass production into many branches of the industry.

43. Foreign competition was by no means a new threat to the British clothing industry. As early as 1902 there were concerns that German trouser manufacturers were 'flooding' the market with cheaper

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goods (Fraser, 1981: 178) and Ewing (1997: 128) reports that in the 1930s hundreds of thousands of women's garments, sometimes entire lines, were imported into Britain.

44. Working conditions and the subsequent suffering of the labourers in these so-called 'world market factories' were, and still are, reminiscent of the sweatshops of 19th-century Britain. Typically, these factories are wholly or partially owned subsidiaries of a large, multinational manufacturer who is based in an advanced economic country. These multinational manufacturers retain control of technological advances and skilled tasks, and only supply their factories in the developing countries with basic machinery, material and pre-cut garments, which are sent back to them once they are assembled. This system allows the parent firm to exploit the cheap labour on offer, while firmly controlling knowledge, in the form of technology and skills, and profits, resulting in 'a mammoth world-scale version of the old putting-out or sub-contracting system – sweating on a global scale' (Wilson, 1985: 85).

45. It is interesting to see that even at the end of the twentieth century the only 'winners' amongst UK clothing manufactures are those targeting high-margin products and niche markets and/or those companies who have established a strong brand ([www.labourbehindthelabel.org](http://www.labourbehindthelabel.org)).

46. In today's depressed clothing manufacturing industry, some manufacturers catering for a market that is less affected by price 'are even increasing the size of their order books' ([www.labourbehindthelabel.org](http://www.labourbehindthelabel.org)) and have 'made progress in exporting' their products (*Key Note Clothing and Footwear* (UK), April 2001).

47. Nonetheless, the continued significance of clothing manufacturing within the total of the UK manufacturing industry becomes clear when one considers that, after this sharp drop in the employment figures, the industry accounted for 4.3 percent of the total UK manufacturing workforce in 1986 (Zeitlin and Totterdill, 1989: 155).

48. Businesses with less than 250 employees qualify as SMEs.

49. According to Phizacklea (1990: 19, drawing on data from the Business Statistics Office, 1987) 72 percent of manufacturers of women's fashionwear fall into this category. Recent developments may have increased this number even more, since CAPITB (2001: 12) maintains that the closure of large companies and the low entrance barrier into the market have encouraged the opening of small firms by ex-employees. The existence of a large number of micro businesses is seen as a positive by-product of the industry's restructuring – not only because the micro-businesses create new jobs, but because they are seen as the breeding ground out of which future successful large-scale companies may emerge.

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## Chapter 4: Methodology

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This chapter provides a description and critical assessment of the research design and methods used in my study of the forecasting and selection processes of womenswear retailers. I show how the theoretical framework discussed in Chapter 1 informed the methodology and research tools used in my study. I also demonstrate how questions and observations raised in the discussions of Chapters 1, 2 and 3 were utilised in the research design, and how they influenced the construction of my interviewing guide. Emphasis is placed on the interconnection of my research objectives, choice of research tools, structure of interviewing guide and identification of interviewees. Particular attention is drawn to how problems of gaining access to respondents influenced and shaped my research project, and how insights gained from pilot interviewees and emerging themes during the course of the fieldwork helped to modify my interviewing guide. I also reflect on to what extent I, as a researcher, have influenced the data and how my choice of themes and questions has shaped the outcome of my findings. After describing my research sample, I ‘introduce’ the respondents and their companies; basic information is provided on respondents’ occupational roles as well as their companies’ organisational structure, market position and target customer group.

### 4.1 Research Aims And Objectives

The overall aim of this thesis is to provide insights into the social world of womenswear retailing by offering a model of fashion forecasting and garment selection derived from an empirical investigation of high street womenswear retailers. The six key research questions are:

- Who are the key players in the fashion industry?
- How is the selection process organised? Are there certain predefined stages through which ideas/garments have to pass?
- How is the division of labour between the key players organised? What is their contribution to the selection process, i.e. what is their unique ‘bundle of tasks’? Is there evidence of teamwork?
- How is the balance of power between key players structured? Are there any areas of conflict between practitioners and, if so, why do conflicts arise?

- What influences key players' decision-making processes? Do they consider the company image and target customer group, or are decisions based on personal taste?

## **4.2 Methodological Underpinnings And Choice Of Research Tools**

As shown in the introduction, the idea for this research stems from my reading of production of culture studies and symbolic interactionist literature on culture and arts. My ambition to study selection processes of womenswear retailers from this vantage point dictated my choice of methodology. Though I do not strictly follow one particular qualitative methodology, my choice of research methods is informed by my reading of symbolic interactionist research guidelines, as set-out, for instance, by Blumer (1969).

### **4.2.1 The basic principles of symbolic interactionist research**

Researchers' choices of methodology and research tools are intrinsically connected with their view of the social world. While positivists' view of the social world is built on the belief that reality 'exists independently of human perception ... [and] that Truth can be measured with statistical precision' (Rubin and Rubin, 1995: 32–3), symbolic interactionists' understanding of the social world is markedly different and, as a consequence, has resulted in a different research methodology which advocates alternative research tools. Quantitative researchers, on the one hand, based on their concern with eliciting objective, quantifiable findings rely on fixed research designs and highly structured research tools, i.e. survey/structured interviews, that are capable of producing standardised data sets. Symbolic interactionists and other qualitative researchers, on the other hand, are concerned with understanding subjects' frames of reference and culturally mediated definitions and meanings and subsequently advocate the use of more flexible research tools such as semi-structured or focused interviews and (participant) observation.<sup>1</sup>

Denzin (1970: 19) lists seven principles derived from interaction theory 'against which methods and sociological activity may be evaluated'. These include: (a) taking the perspective of and viewing the social world from the research subjects' point of view; (b) the investigation of both symbols and interactions; (c) situating individuals' uses of symbols and definitions within the cultural context, i.e. linking the individual and the social; and (d) the realisation that the research act itself is a form of social interaction. Based on these principles, Blumer (1969) has developed the concept of 'naturalistic research', which is divided into two phases: 'exploration' and 'inspection'. The former concerns the collection of detailed descriptions from

which the researcher can build a picture of the events and patterns under investigation; researchers' flexibility in their use of research methods and their ability to move between different lines of inquiry are crucial at this stage. Inspection, on the other hand, refers to the close examination of the relationship between empirical data and sensitising concepts or analytical elements. In other words, with regard to my research, if the literature provides a concept of how fashion buyers select garments, the next step is to look at the empirical evidence, i.e. at concrete examples of buyers' decision-making processes in order to compare theory with empirical reality. Blumer (1969) describes this process of inspecting social phenomena as follows:

One goes to the empirical instances of the analytical element, views them in their different concrete settings, looks at them from different positions, asks questions of them with regards to their generic character, goes back and re-examines them, compares them with one another, and in this manner sifts out the nature of the analytical element that the empirical instances represent. (Blumer, 1969: 44-5)

From his reading of Blumer's principles of naturalistic research, Hammersley (1990: 156) lists the following criteria he believes to be characteristic of research in this tradition. First, naturalistic research departs from the objective of studying social life in an experimental way but focuses instead on the importance of a 'real world' setting. The underlying idea of minimising researchers' influence on what is to be studied is reminiscent of the concerns of positivists.<sup>2</sup> However, while positivists seek to achieve this through the 'control of variables' (Hammersley, 1990: 156), symbolic interactionists aim to arrive at the same goal through a minimum of intervention. This means that, instead of trying to create laboratory-like conditions through imposing a high level of control on the research act, the goal of symbolic interactionism is to study actual instances of interaction in their natural settings over a period of time. Finally, symbolic interactionists promote

... flexible data-collection strategies in which decisions about what data to collect and how are made over the course of the research ... [and] the construction, and continual reconstruction, of a model of the processes under study. (Hammersley, 1990: 156)

This throws light on yet another dimension in which qualitative and quantitative research differ. While the latter is more concerned with the testing of preconceived concepts and theoretical constructs, symbolic interactionists, for example, advocate the use of sensitising concepts which help researchers to make sense of their data. Sensitising concepts are not seen 'as given and fixed in meaning.

They can be refined and developed, and it is through inspection that this is achieved' (Hammersley, 1990: 160).

With the basic differences between qualitative and quantitative research and the fundamentals of symbolic interactionism in mind, we can now look more specifically at one research tool, i.e. interviewing.

#### **4.2.2 The semi-structured interview: differences between quantitative and qualitative forms of interviewing**

Interviewing is arguably the most widely used method of research. Benney and Hughes (1994: 215), for example, have referred to interviews as 'the favourite digging tool of a large army of sociologists'. Interviewing styles are commonly differentiated by the degree of structure imposed on their format; this determines their position on the quantitative–qualitative research axis.<sup>3</sup>

In order to conduct successful interviews, researchers and interviewees need to share a mutual understanding.<sup>4</sup> Any gaps in understanding can be overcome either by seeking clarifications of interviewers' questions or by probing for additional information of interviewees' accounts. However, the freedom to clarify and probe depends on the degree of structure imposed on the interview. Within the context of structured interviews, for example, researchers' ability to probe and provide additional information or clarification is limited because divergences from the interview guide are felt to jeopardise the validity of this form of research. Indeed, structured interviews not only limit researchers' ability to probe, but also impose restrictions on the wording and sequence of the questions, which have been predefined and are the same in each interview, as well as guiding and controlling respondents' answers through the use of 'closed' and directive questions.<sup>5</sup> The closed nature of this type of inquiry suggests that situations have been defined in advance, i.e. the boundaries of inquiry have been set and it is neither possible for interviewees to introduce new topics nor for the researchers to follow up ideas that have emerged during the course of research.

In contrast to quantitative styles of interviewing, qualitative interviews – such as semi-structured and focused interviews – do not restrict the ability of researchers or subjects to probe and seek further information as long as researchers observe the rules of neutrality in wording; for example, 'leading' questions should be avoided. The use of 'non-directive' or 'open' questions in semi-structured and unstructured interviews gives interviewees far more latitude in their response and enables them to introduce issues of their own accord. While critiques of this style of interviewing see the open-ended nature and flexibility of qualitative interviews as problematic since

interviewees may diverge from researchers' areas of interest and simply talk about any issues they want, practitioners of qualitative research view this apparent disadvantage as an advantage. They argue that 'rambling' can provide the interviewers with information that reveals something about the interviewees' concerns. Rubin and Rubin (1995: 12), for example, point out that imposing one's own definition of what should and should not be included may result in missing significant issues and may subsequently limit our understanding of the field.

The flexibility of qualitative interviewing can also be reflected in the openness of the sequence of questions, which can be changed to accommodate the specificities of each interviewing situation/interviewee (Denzin, 1978: 115). Indeed, it is important to customise the questions one asks, because the goal in qualitative research is to understand 'what happened and why, in rich and individualistic terms' (Rubin and Rubin, 1995: 11) – a goal which cannot be obtained if one were to ask the same questions of all interviewees. Qualitative forms of interviewing are thus also characterised by their flexibility or continuity in terms of design, which allows researchers to incorporate new topics and directions that may emerge during the course of the fieldwork into subsequent interviews.<sup>6</sup>

Qualitative interviews not only differ from structured ones in regard to their form, but also in terms of their concern for the interviewees' perspective since participants in qualitative interviews are able to use their own frame of reference. In fact, focused or unstructured interviews best fulfil Lofland's (1971: 84) ideal type of research interview described as a 'guided conversation', because interviewers simply have a list of topics (the interview guide) they want respondents to talk about.<sup>7</sup> This flexible approach to interviewing reflects the aim of qualitative researchers to 'elicit answers which are, as far as possible, in the person's own words and frame of reference' (May, 1993: 97). This shows qualitative research's prerogative of studying the empirical world from the inside instead of imposing preconceived ideas and structures from the outside (Sarantakos, 1998: 46).

In analysing the advantages and disadvantages of specific research methods, one also has to include considerations of the impact these methods may have on those who are being researched. Thus, some scholars have asked how participants benefit from taking part in a research project when, on the surface, the distribution of gain within the research bargain seems to be solely to the advantage of the researchers.<sup>8</sup> It has been suggested that one reason why individuals participate in research is that they enjoy talking about themselves and that it can be rewarding to do so when one has a sympathetic listener (Finch, 1984; Zweig, 1949). If this is the case, it raises questions about whether the relative enjoyment subjects get from

participating in quantitative and qualitative research differs, since the former provides no scope for interviewees to pursue their own topics.<sup>9</sup> Moreover, the way in which participants in quantitative research are positioned relative to the researcher introduces hierarchical structures and an uneven balance of power into the research bargain.

Feminist researchers, such as Oakley (1981) and Finch (1984), have raised strong concerns regarding the subordination of interviewees in structured interviews. Both advocate the interviewers' investment of their personal identity, feelings and experience, because this fosters interactive interview situations and generates collaborative approaches to research projects. This closer, non-hierarchical relationship between researcher and researched is based on the principle of 'no intimacy without reciprocity' (Oakley, 1981: 49). Interview situations thus become more like a friendly, informal conversation in which 'the interviewer is acting as a friendly guest, not an official inquisitor' (Finch, 1984: 73). Likewise, Rubin and Rubin (1995: 19) argue for the establishment of fair, non-hierarchical research bargains and point out that this can be achieved through researchers' willingness to learn interviewees' cultural definitions and to ensure that the 'voice and thoughts of the conversational partner can come through. Cultural understanding and a relationship of equality between researcher and researched are thus two components of qualitative philosophy (Rubin and Rubin, 1995: 2).<sup>10</sup>

We can therefore see that quantitative and qualitative forms of interviews not only differ in terms of their methodology, but also at a deeper level that is related to the perception of 'self' and 'other'. By treating interviewees as active collaborators instead of passive respondents, interviewers' position in the interview situation changes as well. They undergo a metamorphosis from objective data-gathering entities to full human beings; in this way, interviewers not only learn about the interviewees' perceptions but also about themselves.

The mythology of 'hygienic' research with its accompanying mystification of the researcher and the researched as objective instruments of data production [has to] be replaced by the recognition that personal involvement is more than dangerous bias – it is the condition under which people come to know each other and to admit others into their lives. (Oakley, 1981: 58)

This position is reminiscent of symbolic interactionists' understanding of the research act as a form of social interaction. Subsequently, 'interviews [have to be] ... seen as negotiated accomplishments of both interviewers and respondents that are shaped by the contexts and situations in which they take place' (Fontana and Frey, 2000: 663).

Seen in this light, interviews take on the form of social encounters and, like other forms of social encounters, can be studied in terms of 'role-playing and impression management' (Dingwall, 1997: 56, cited in Fontana and Frey, 2000: 664). This perspective draws attention to the fact that all forms of interviewing have the inherent problem that the roles of the two participants are quite different to those found in ordinary conversations. One participant – the researcher – will always be 'the expert in asking the questions, [while] the respondent is the expert as far as answers are concerned. The two interactors enter the encounter with different perspectives' (Denzin, 1978: 132). Thus, there is a fundamental difference in the roles of the two participants that influences the dynamics and outcome of interviews.<sup>11</sup>

Moreover, interviewers' personal characteristics such as age, gender, race, style of clothing, social status and accent may influence interactional encounters with interviewees and hence the data that are collected (Burgess, 1984: 105). This is referred to in the literature as 'interviewer effect', which is sometimes sought to be overcome by 'blending-in', i.e. by matching the characteristics of the subjects being researched. Benney and Hughes (1994), for example, argue that one of the conventions governing interview situations is that of equality.<sup>12</sup>

The interview is an understanding between the two parties that in return for allowing the interviewer to direct their communication, the informant is assured that he will not meet with denial, contradiction, competition or other harassment.<sup>13</sup> ... the fiction or convention of equality must govern the situation. Whatever actual inequalities of sex, status, intelligence, expertness or piqué exist between the parties should be muted. (Benney and Hughes, 1994: 219–20)

Since the objective of interviews is to gain detailed accounts and factual information, it is hoped that by minimising differences between researchers and subjects, the latter will refrain from giving socially acceptable answers that would present a more convenient way of dealing with interviewers' questions than expressing their actual views (Fielding, 1993: 145).<sup>14</sup> While the reasons for seeking a match between interviewer and interviewee are often related to issues of getting at the 'truth' and avoiding fabrications (e.g. Denzin, 1978: 119), feminist researchers also favour a (gender) fit between interviewer and interviewee – but for different reasons. Finch (1984) explains these as follows

... however effective a male interviewer might be at getting women interviewees to talk, there is still necessarily an additional dimension when the interviewer is a woman, because both parties share a subordinate

structural position by virtue of their gender. This creates the possibility that a particular kind of identification will develop. (Finch, 1984: 170)

To sum up: all interviews are forms of social interaction inevitably influenced by researchers' assumptions about their interactional partners, and vice versa; interviews are equally influenced by general rules and conventions governing conversational encounters in a specific culture. It follows that researchers' characteristics, the content and format of their questions, combined with the context of the interview situation all have an effect on the kind of data gathered. From this perspective, it can be seen that the usefulness of a specific style of interview depends on its compatibility with the topic under investigation. Therefore researchers' choice of methods have to be tailored to fit their research aims and objectives.

### **4.3 Choice Of Research Tools And The Research Process**

My research objectives/questions and their theoretical grounding are based on symbolic interactionist and production of culture studies of culture industries and art worlds; I therefore decided early on that it was important to give respondents room for their interpretations and detailed descriptions of *what they do* and *how they do it*. Since I was interested in interviewees' decision-making processes and their explanations of how they forecast fashion trends and select garments, I chose to use qualitative methods of research, i.e. observation and semi-structured interviews. My aim was to collect data through interviews and in the observation of naturally occurring day-to-day working situations that would provide me with comprehensive accounts of the social dynamics and working relationships that structure participants' interactions. In addition, I was hoping to gain insights into key players' collective efforts to create and select clothes that are suitable for their target market/customers.<sup>15</sup>

My decision to combine interviewing with observation was based on my awareness of the advantages and disadvantages of each of the methods as well as my belief that the triangulation of research tools would produce a more rounded data set, 'because each method reveals different aspects of empirical reality' (Denzin, 1970: 26). I believed that the main advantage of engaging in observation would be a sound understanding of my research area, thus helping me to culturally attune myself with the setting. Observing practitioners in their day-to-day routine would open up unexpected areas of investigation, inaccessible through other means, which could be followed up in the interviews. I was drawing on Burgess's (1984: 103) reading of Zweig (1948) who recommended that 'it is essential to observe people before a detailed conversation can occur', because it is only through the assimilation of

detailed knowledge about the cultural setting that researchers learn how to frame questions in such a way that subjects are willing to engage in in-depth conversations. Although these recommendations are particularly important for researchers who study cultural settings that are far removed from their own cultural background, the ability to frame questions in a way that is accessible and interesting/relevant to interviewees is important for all researchers. Indeed, as discussed earlier, taking the perspective of the research subjects and viewing the social world from their point of view is one of the prime objects of symbolic interactionists:

... the use of language, particularly the use of specific terms, is important in the creation of a “sharedness of meaning” in which both interviewer and respondent understand the contextual nature of specific references. (Fontana and Frey, 2000: 660)

In addition to employing observation as a means of gaining cultural understanding, I was hoping to use observation to validate some of the things I learned in the interviews.<sup>16</sup> I was particularly interested in sitting in on selection meetings to observe the interactional dynamics between the various occupational groups. Through observing the routines involved in putting garment ranges together I was hoping to learn more about the division of labour, power structures and ‘alliances’ between social actors, which would have been a very useful contribution to the themes of ‘teamwork’ and ‘conflicts’ that I was exploring in the interviews. Despite the great strength of observation as a relatively unobtrusive means for gaining knowledge of a cultural setting, I rejected the idea of using observation as the sole means for data collection because, like Robson (2002: 271), I believed that ‘individual perceptions of processes within a social unit ... are best to be studied ... using a series of interviews’, and that observation on its own would not sufficiently explain actors’ decision-making processes.

However, problems of gaining access, which will be discussed later, forced me to abandon my aim of combining observation with interviewing; instead I was only able to collect data through interviews. In order to compensate for the loss of cultural sensitivity that could be achieved through observation, I consulted company reports and websites as well as other industry sources.<sup>17</sup> These primary materials helped me to become familiar with some of the industry’s phraseology and jargon as well as to learn about its most recent developments and problems.<sup>18</sup>

Having been restricted to the use of only one research tool, i.e. semi-structured interviewing, I tried to ‘exploit’ the strengths of this method. Although I framed the context of the interviews by identifying certain themes and topics from the literature that I wanted to explore in the interviews, and even though I informed

the interviewees at the outset of the interview of the themes I wanted to talk about, I was keen to conduct the interviews in an open and flexible manner. Consequently, although I guided the interview indirectly by setting the parameters of those topics I was hoping to investigate, I did not follow a set sequence of questions but changed the order and wording of questions to accommodate differences in interviewing situations and between subjects. This allowed ample room for the respondents to express their views and perspectives. However, it should be pointed out that I only achieved this form of interviewing later on during the fieldwork once I had improved my interviewing skills and had gained more experience and confidence in the role. This process is discussed at greater length later on.

By employing a fairly flexible approach, I ensured that interviewees could talk about their work and their decision-making processes in a way that suited them. They could introduce themes of their own and point out areas they felt I had insufficiently addressed in my questions to them. However, not following a strict sequence of questions sometimes posed problems for me when interviewees assumed I shared their background knowledge and hence only alluded to some points in passing. On such occasions, I interrupted interviewees' accounts to ask them to clarify certain points or tried to probe for more in-depth explanations/descriptions.

This relatively free-flowing approach did not suit all respondents and some clearly expected me to take more of a leading role. These respondents were more conscious of answering the questions I posed and indeed occasionally wanted reassurance that they had answered my questions fully and properly. In those interview situations, I followed the interviewing guide fairly closely, while nonetheless ensuring that the questions and their sequence were appropriate for interviewing the particular respondent. Lofland (1971) describes a similar situation as follows:

It happens that people vary a good deal in the degree to which they speak freely or are chatty and verbal. When one encounters less verbal, less free, less chatty interviewees, it is likely that one will go through his interviewing guide in the order that he has set up the questions. The interviewees may provide little response to each question, giving one little place to go, save to the next question. (Lofland, 1971: 85)

Even though I guided the interview more directly in these instances, I still obtained detailed accounts that reflected the interviewees' perceptions more naturally than it would have done had I employed a more structured form of interviewing.

As previously discussed, the ways in which researchers present themselves, and are seen by those they interview, influence the interviewing situation (Rubin and

Rubin, 1995: 39). At the outset of my research I gave a lot of thought to what I was going to wear when interviewing subjects. I decided against trying to make a 'fashion statement' – although Denzin (1978: 131) suggests that interviewers should 'dress in the mode of dress most acceptable to those being interviewed' – and instead opted for a professional style of dress. I was thus hoping to avoid any fashion faux pas, while at the same time seeking to establish myself as a young academic as opposed to a student.<sup>19</sup> Despite a relative consistency in the way I dressed and in my manner, the way in which interviewees acted towards me suggested that their perception of me differed significantly. Thus, it seemed that the younger, less senior interviewees, such as Kate and Jane (see Table 5, pp. 160-1), treated me more like an 'expert' and expected me to guide them in the interviews (see my earlier comment). Kate, for instance, occasionally wanted reassurance that she was answering the questions properly and both interviewees asked me for my opinion on some of the issues we discussed. While I gave them my opinion, I stressed that their working experience put them in a far better position to speculate on these issues than me.

On the other hand, more experienced interviewees seemed to identify with me in terms of having been students themselves once and of having had to rely on the help of others to gain entry into the industry. To refer to Finch's (1984: 170) arguments regarding the gender dynamics between interviewer and interviewee, identification may also have occurred due to the fact that that as women – 17 out of the 20 interviewees were female – we shared similar experiences due to our structural position. Hence, it can be speculated that female interviewees' own experiences when starting their careers had a positive impact on their willingness to help me in my research and their openness in answering my questions.<sup>20</sup> This group of interviewees clearly realised that they were the experts in that they had access to the kind of knowledge and experience I was interested in and they were comfortable with a very open style of interviewing. The research bargain with this group most closely resembled that of equality.

On the other hand, I also conducted a number of interviews with senior staff (in particular Tim and Anne), which considerably altered my position in the interviewing bargain. Although I had already improved my skills as an interviewer at the time of conducting these interviews, the considerable experience of these interviewees and their teaching roles within their companies ensured that they dominated the interviewing situation. While Benney and Hughes (1994: 220) suggest that higher-status interviewees aim to re-establish the balance of equality by 'addressing themselves subjectively, not to the actual interviewer, but to the study

director or even his sponsor', I felt that the role distribution in these interviews was more akin to that of teacher and student.

I committed a 'slip of competence' in my interview with Tim which made it all the more difficult for me to recover from my disadvantaged position. As Lofland and Lofland (1995) have pointed out:

... if you are to avoid being perceived as either frivolous or stupid and dismissed as such, you should have enough knowledge about the setting or people you wish to study to *appear competent to do so*. (Lofland, 1995: 40, original emphasis)

In fact, younger researchers may have to prove 'more knowledge' than older researchers, simply because youth in itself may be regarded negatively (Lofland and Lofland, 1995: 41).

The 'slip of competence' I am referring to was my admission that I had never visited one of Tim's company's retail outlets. At the time of the interview there were no branches in Edinburgh and, although I had planned to have a look at one of the London branches before the interview, my time schedule did not allow me to do so. Instead of lying about my omission I owned up to it. Unfortunately, Tim seemed offended that I had never been to one of 'his' shops and subsequently seemed to doubt my competence in, and commitment to, the task at hand. As a result of this experience, I always made a point of visiting the relevant shops or concessions and looking at the company's website, if it existed, shortly before the interview to ensure that my knowledge was up-to-date. I have noted in subsequent interviews that this practice left a favourable impression on interviewees and encouraged them to talk to me.

The difficulties that arose in the interview with Tim could partly also stem from gender dynamics. Thus, the slight feeling of inadequacy that I developed after Tim found out I had never visit any of his company's shops might have been further accentuated by the fact that I (an inexperienced female researcher) was interviewing a male director of buying with more than 22 years' experience of working in the industry. This situation, in particular, made me aware of my own vulnerability within the research bargain.<sup>21</sup> Being new in my role as researcher I was clearly not the 'expert' in asking questions that Denzin (1978: 132) had in mind when discussing the interviewer-interviewee relationship. Indeed, it is interesting to note that although Anne – who was the most senior member of staff that I interviewed – dominated the interview situation, I felt more comfortable during this interview. Since the interviewing situations with the other male interviewees in the sample (Adam and

Eric) were similar in tone and interactional dynamics to the ones I carried out with female interviewees in similar occupational positions, I am not certain whether my experience in interviewing Tim can be related to gender issues or to the interviewing faux pas I had committed. Yet, as Lofland and Lofland (1995) point out:

... when “incompetent” statuses are compounded, so trouble may be. For example, researchers who are young and female and therefore “unthreading” are often granted easy entree to research settings. But in some of these (highly technical and highly masculine ones, for example) this advantage may prove a double-edged sword. If “unthreading” translates into ‘unserious’, one may find oneself merely humoured by participants ... (Lofland and Lofland, 1995: 41)

My own position as well as my belief in the importance of conducting interviews in a friendly and collaborative manner set the tone of the interviews. To borrow Finch’s (1984: 73) words, I acted ‘as a friendly guest’ and, as such, answered interviewees’ questions before, after and during the interview.<sup>22</sup> However, the emphasis of the interviews was on understanding the interviewees’ points of view and hearing their own interpretations of their working practices. Although this form of interview is particularly important when researching sensitive issues or in situations where the distribution of power between interviewer and interviewee is tilted more clearly in favour of the former, I believe that the atmosphere this kind of interviewing technique creates is always desirable since it promotes respect and mutual trust between the two parties involved. Understanding in this sense does not refer to the straightforward comprehension of the words and phrases used, but to cultural understanding, i.e. one’s awareness of the culturally mediated meaning of what is said. I was hence trying to avoid imposing any preconceptions or motives on the interviewees and was able to learn more about their own conceptions. In this respect, I was following Fontana and Frey’s (1994: 371) suggestions that ‘the researcher must adapt to the world of the individuals studied and try to share their concerns and outlooks. Only by doing so can he or she learn anything at all.’

#### **4.4 Identification And Recruitment Of Interviewees**

Our choice of interviewees has important consequences on the data we collect and on our subsequent findings and conclusions. Once we have decided on a topic of investigation and have defined some of our core ‘puzzlements’ (Lofland, 1971: 76) – in other words, research questions we want to pursue – we have to ask ourselves whom we need to interview in order to obtain information on these issues. Since my overall aim was to gain insights into the social world of womenswear retailing and to

offer an alternative model of fashion forecasting and garment selection at the high street womenswear retailing level, I decided to concentrate my research on fashion industry practitioners. This restriction to the production side of fashion does not violate my overall argument that the production and consumption of cultural artefacts stand in a dialectical relationship, because I believed it was possible to study this interplay of production and consumption on a micro level, i.e. by looking at key players' decision-making processes. Based on my study of textbooks on the fashion industry (e.g. Bohdanowicz and Clamp, 1994; Baynes et al., 1990; Chapman, 1996; Cooklin, 1991; Costantino, 1997, 1998; Perna, 1987), I identified designers, buyers and merchandisers as the three key occupational groups at the high street womenswear retailing level.

Having identified whom to approach, I had to decide which womenswear retailers I would contact. I consulted a number of reference books on UK retailers and decided to contact over 30 multiple retailers of womenswear, each of whom had at least 10 retail outlets in the UK and whose headquarters were based in the UK. The reason for applying these restrictions in size and location were purely practical. I assumed that retailers with 10 or more outlets would have design, buying and merchandising departments, while restrictions on the location of retailers' headquarters reflected my monetary limitations. However, once again, the realities of carrying out research 'interfered' with my research design and access problems meant that I also included retailers that had no, or no local, in-house design team. While initially I felt this to be a shortcoming because my aim was to interview one respondent from all three occupational groups, i.e. a designer, buyer and merchandiser from all the companies in the sample, I learned during the course of my fieldwork that not having a design team was a characteristic of the organisational structure of a certain group of retailers, namely buying-led ones (see Chapter 6).

I then phoned the companies' main switchboards to get the names and contact details of a number of designers, buyers and merchandisers from each company. It was at this stage that I had to negotiate company gatekeepers. In my phone calls, I introduced myself and the nature of my request briefly and met with a variety of different responses. Generally, I found that it was more difficult to get access to the names and contact details of potential respondents who worked for large companies and I was often asked to explain the nature of my request in more detail and was only reluctantly given some information. The reasons for this probably lay in the fact that these retailers attract more attention from suppliers, the media and other researchers than smaller firms. Moreover, these heightened levels of contact and appeals for information may have resulted in stricter access policies. One potential respondent,

for example, informed me that her company operated a no-access policy and did not allow its employees to participate in any kind of research projects.<sup>23</sup> However, other switchboard operatives were very helpful and often provided me with the names of the entire design, buying and merchandising teams.

After collecting contact details, I wrote letters (see Appendix B) to a selection of possible respondents, in which I introduced myself and the objectives of the study. In total, I sent approximately 130 letters, divided into five batches. Overall, interviews were conducted from November 2000 until November 2001. The sampling method used was similar to what Punch (1998: 193–4) calls ‘purposive sampling’, i.e. ‘sampling in a deliberate way, with some purpose or focus in mind’. In my case, the aim was twofold: (1) to include a cross-section of womenswear retailers in terms of market position and age of target customer group; and (2) to interview a designer, buyer and merchandiser from each of the companies. Unfortunately, as the following section shows, this technique was only of limited success and subsequently I relied on ‘snowball’ techniques (May, 1993: 100; Denzin, 1970: 85). ‘Snowballing’ describes the process by which I gained access to interviewees through referral from people whom I had already interviewed.<sup>24</sup> As May (1993) points out, the drawback of this technique is that the decision of whom to interview next rests with the interviewees and may result in

... the researcher collecting data which reflect a particular perspective and thereby omitting the voices and opinions of others who are not part of a network of friends and acquaintances. (May, 1993: 100)

However, concerns over using this method are more relevant when one studies people’s beliefs because it is more likely that one will meet people with similar outlooks if one gains access through friendship networks. Decision-making processes, on the other hand, are a more ‘value-free terrain’ and I would expect that interviewees’ referral to their (former) colleagues was not so much based on personal friendship as on their assessment of the person’s competence and willingness to be approached for an interview. The severity of my access problems, discussed in the following section, meant I was left with little scope to actively choose whom to include in my interviews. As Robson (2002: 378) points out, ‘in real world enquiry, the contest between what is theoretically desirable and practically possible must be won by the practical’.

#### 4.5 Sample Size And Problems Of Gaining Access

After determining which occupational groups and retailers to include in my research, I decided that a sample size of between 20–25 interviewees was appropriate for my study. The influencing factors in this decision were related to: (a) my estimate of what would be a reasonable time to spend on the collection and transcription of data; (b) considerations regarding travel expenses; and (c) the overall manageability of the data set.

The response rate to my letters was very low; altogether I received no more than 10 replies, only two of which responded positively to my request for an interview. In the course of my follow-up phone calls, three prospective respondents suggested I send them questionnaires. Feeling that a traditional questionnaire could not provide satisfactory answers, I sent them an abbreviated copy of my interview guide with adequate space for them to write down answers instead. I also included a stamped self-addressed envelope and a cover letter in which I again outlined the aim of the research and invited them to get in touch with me should they change their mind about being interviewed. However, none of them sent back the interview guide/questionnaire or contacted me to arrange an interview.

In the literature, access problems are often associated with ethnography where it is associated with ‘initial negotiations to enter a setting and during the “first days in the field”’ (Hammersley and Atkinson: 1983: 54). However, as my experience shows, gaining access is just as important when conducting other research and is by no means restricted to the beginning of a project, but needs to be negotiated continuously (Burgess, 1984: 45).

I encountered three common grounds on which respondents refused access. First, some companies entertain a strict ‘no-research’ policy which denies access to all outsiders. Another obstacle to gaining access was presented by the fact that fashion retailers have been the topic of research for a number of academic studies. Thus, some respondents refused access on the grounds that they had only recently participated in another research project. The most common reason for refusal, however, lay in the nature of the industry’s production cycle, which has been speeding-up significantly over the last years. Thus, individuals often expressed their wish to participate but felt unable to do so due to their strict deadlines. A high degree of flexibility on my part sometimes proved successful in overcoming this last obstacle.<sup>25</sup>

Most of the interviews were either arranged during a ‘follow-up’ telephone call or by applying ‘snowball’ sampling techniques described earlier. This form of sampling is especially useful when *entrée* to a setting is difficult, because it can be

used to 'build upon *preexisting relations of trust* to remove barriers of entrance' (Lofland and Lofland, 1995: 38, original emphasis).

In total, I interviewed 25 respondents; of these 25 interviews, 3 were pilot interviews and 2 were not properly recorded due to technical problems. The study is thus based on the data collected from the remaining 20 respondents (see a description of the sample in a later section). With hindsight, I believe that I could have achieved a higher response rate if I had established contact with staff at the managerial level who could have acted as gatekeepers (Hammersley and Atkinson, 1983: 63). Of course, gaining access through a third person can also prove problematic because

The points of contact which the researcher has with an institution, organisation or group will influence the collection of data and the subsequent perspective that can be portrayed. Finally, the activities that occur during this key phase of the research process will influence the ways in which those who are to be researched define the research and the activities of the researcher. (Burgess, 1984: 45)

There are examples in the literature, e.g. Gouldner (1954, in Hammersley and Atkinson, 1983: 63), which describe the problems of entering an organisation through a particular set of gatekeepers (for instance, management and union) and establishing a trusting relationship with those one wishes to study. Thus, while my method of negotiating access was time consuming, frustrating and only resulted in a low success rate, it avoided the problems associated with gaining access through a 'sponsor', i.e. someone of authority within an organisation (Walker, 1980: 49, in Burgess, 1984: 39). By negotiating access directly with the person I was seeking to interview I avoided some of the pitfalls associated with an *entrée* through a third party. If I had arranged interviews through the organisational/management hierarchy, I may have gained information that was more in accordance with the 'company line'. As it was, those who agreed to participate did so of their own accord, not to please their bosses, and perhaps felt a greater trust and confidence in talking to me.

#### **4.6 Anonymity, Confidentiality And Informed Consent**

In my initial letter to prospective interviewees and the subsequent follow-up phone calls, I fully disclosed the nature and purpose of my research and reassured respondents that their own and their company's anonymity and confidentiality would be safeguarded by substituting their name with a pseudonym both during the transcription as well as in the writing-up process and by replacing the company name with the neutral description 'my' or 'the company'.

At the start of each interview, I once more explained the purpose of my research and how the data would be used. I asked each interviewee whether they had any objections to the interview being recorded.<sup>26</sup> Although some respondents jokingly said they hated listening to their voice on tape and felt slightly self-conscious about being recorded, all of them agreed to being taped. Once transcribed, I sent a copy of the transcript and a letter to each informant reassuring them that they could make changes if they wished.

Although I took the issue of gaining informed consent from interviewees very seriously and explained to all participants why I wanted to interview them and what the material would be used for, as well as encouraging them to ask questions and raise any concerns they may have, occasionally interviewees' comments after the interview suggested that they did not fully understand the purpose of my research. It seemed that some respondents thought I was also going to interview consumers about their shopping practices and were interested to learn about my findings in this respect. The assumption I was going to interview consumers surprised me, since I had always emphasised, in my initial letter, follow-up phone call and before the interview commenced, that it was designers', buyers' and merchandisers' decision-making processes during forecasting and selection that interested me. Thus, on the occasions when it seemed that interviewees were still unclear about the purpose of my project, I explained to them again which particular groups I was interviewing and the reasons for my choice.

#### **4.7 Interviewing Guide**

The material discussed in Chapters 1, 2 and 3 helped me to identify a number of important themes and research questions that I felt I needed to address in my study of selection processes of womenswear retailers.<sup>27</sup> These were:

1. Interviewees' biography
2. Company structure
3. Forecasting
4. Selection
5. Conflicts
6. Technology

Although I was very interested in finding out whether consumers and consumption-related issues influenced practitioners in their decision-making processes, I chose not to include a separate theme of 'consumers' and 'attitudes to

consumers' in order to avoid unduly influencing interviewees by turning these issues into a separate, prominent area of interest. Subsequently, I feel that the volume of data I gathered on these topics without singling them out is significant and strengthens my argument that the consumption of fashion influences its production and vice versa.

In order to ensure that my questions were of interest and relevance to interviewees, I devised two, slightly different interviewing guides: one for retail- and supplier-based designers, and a second for buyers and merchandisers (see Appendix C). In my construction of the interviewing guide, I followed Lofland's (1971: 79) advice and considered 'what will make sense to [the interviewees] and what will be most acceptable' to them both in terms of the overall content as well as in the structure/sequencing of the questions.

A good interview schedule has a rhythm to it which takes the respondent through what appears to be a set of issues which are sensibly related. Interviews cannot jump, without explanation, from one topic to another. (Breakwell, 2000: 241)

Thus, I decided to begin the interviews with some general questions on interviewees' biography. This served the purpose of helping me to 'place' the interviewees in terms of their experience of working in the industry and their current occupational position as well as helping to 'break the ice'. The latter was achieved by putting interviewees at ease by reassuring them that, since the interview focused on their current job and their previous experience, they were more than competent to answer the questions put to them (Rubin and Rubin, 1995: 131). The interviewing guide then moved on to establishing facts and basic descriptions about the company's organisational structure, and the stages and decision-making processes involved in the forecasting and selection levels. The next topic covered was that of conflicts, which is the most sensitive one since interviewees may worry about 'betrayal' of the company line or their colleagues. Thus, both in terms of the structural as well as the emotional content, it made sense to move to this topic towards the end of the interviews once interviewees felt they could trust me with this kind of information. Sequencing questions according to their difficulty and level of sensitivity is a practice advocated by Rubin and Rubin (1995: 134) and Robson (2002: 277). Finally, and again in accord with Rubin and Rubin, and Robson, I moved to my last (once again, more general) topic, which Robson (2002: 277) describes as a 'cool[ing]-off' ... [that includes] a few straightforward questions at the end to defuse any tension that might have built up'. I asked interviewees about the impact of technological developments on their work and the fashion cycle in general,

and concluded the interview by asking them whether they could think of any other questions or topics that were important and had not been discussed in the interview.<sup>28</sup>

#### **4.8 Pilot Interviews And The Modification Of The Interviewing Guide**

In November 2000, I conducted three pilot interviews in order to test my draft interviewing guide.<sup>29</sup> Although perhaps more important when devising and testing interview schedules for structured interviews, pilot interviews can also be useful when conducting qualitative research (Breakwell, 2000: 243) because they may be an important resource in the process of obtaining a more in-depth knowledge of the field by pursuing a number of broad themes; these themes can then be developed in more detail in later interviews (May, 1993: 137). Moreover, they 'are vital in helping you to get acquainted both with your interview schedule or guide and with respondents of the sort you will encounter in your main data gathering' (May, 1993: 145). Pilot interviews can also help in establishing whether or not the questions asked yield the type of data one is interested in (Breakwell, 2000: 243).

In my initial interviewing guide I included only four areas: fashion forecasting, fashion selection, conflicts, and a section dealing with the impact of technological advances on the fashion cycle/production. Studying my notes (these interviews were not recorded), I found that some of the questions did not 'work', either because they were too similar to others and by posing them I effectively asked respondents to repeat themselves or, more important, questions were phrased in such a way that respondents were unclear what I was trying to 'get at'.<sup>30</sup> A good example of the latter was my question about respondents' 'occupational identity' and 'power relationships', which interviewees found difficult to relate to. I found that using sociological jargon - what Fielding (1993: 144) calls 'sociologese' - such as the concept of 'occupational identity' posed problems because respondents were not used to thinking about themselves in this way and hence found it difficult to relate to the question. After careful reflection on the pilot interviews, I reassessed the interview guide's structure, content and workability. I first of all included a section on the interviewee's biography to provide an easier opening of the interview situation. Then I looked at what I had learned from asking the questions that I had asked and also took into consideration how I would have to modify my questions in order to make them more appropriate for interviewing retail-based respondents. I decided that I should include more questions on the processes of modification of ideas/garments and the narrowing-down of sample ranges - an area that I had previously neglected in the pilot interviews.

After revising my draft interview guide, I conducted my first interviews with a retail-based designer and a retail-based buyer.<sup>31</sup> I used the long gap of almost two months between these interviews and the next ones to transcribe the interview with the designer (Kate) and to once again assess the effectiveness and workability of my interview guide. At this time I was also aware that I had to abandon my hopes of supplementing my interview data with notes from participant observation. The realisation that I would not be able to sit in on trend forecasting and garment selection meetings as an observer meant that I had to obtain the necessary in-depth data through interviews. Once it became clear that interviewing was the only possible method of data collection, I reassessed and slightly modified my interviewing guide to include more detailed questions on the 'hows', 'whos' and 'whens' of the forecasting and selection process. In particular, I included more questions concerning the division of labour between key players.

Throughout the course of the interviews, I kept an open mind about emerging themes. For instance, it was only after having conducted a number of interviews that I realised that interviewees' descriptions of their company as design-, buying/design- or buying-led had important implications for the division of labour and power between the key occupational groups. Subsequently, in later interviews I included more detailed questions about the organisational structure of the company and the impact it has on key players' working relationships. I learned that it was better to approach some themes indirectly. When asked about conflicts between key players, most interviewees said that they had very good working relationships with their colleagues. However, when asked whether there were typical areas of disagreement between key players or whether designers have a different outlook than buyers/merchandisers, all interviewees could cite at least two examples highlighting areas of conflicts or discrepancies between key players. Indeed, the positive aspect of having long gaps between interviews was that it allowed me to engage in a reflexive reassessment of my interviewing guide and the data I had obtained hitherto and to include questions that emerged during fieldwork. The stretched-out period of fieldwork also enabled me to look at myself as an interviewer and to question my interviewing skills. Looking back over the first interviews, I realised that my lack of experience and unfamiliarity with some of the themes raised by interviewees made me a slightly nervous interviewer, too concerned with keeping control over the interview situation. However, as my interviewing experience/skill, confidence and knowledge increased, I adapted a more free-flowing approach to interviewing and was able to obtain more interesting data because I 'granted' respondents greater freedom to explore topics of their choice. Interviewees, for example, talked about

differences in occupational outlooks between themselves and the other key players involved in the decision-making processes, which in turn gave me insights to potential areas of conflict and tension which my direct questions had failed to obtain.

#### 4.9 The Research Sample

As mentioned earlier, my research is based on 20 semi-structured interviews that were carried out between November 2000 and November 2001. The interviewees were designers, buyers and merchandisers who work in the high street womenswear industry.<sup>32</sup> Interviews lasted between 25–75 minutes and were conducted at respondents’ place of work.<sup>33</sup> As Table 3 shows the sample consists of 17 women and 3 men, of whom 10 (all female) were working as designers, 7 (6 female, 1 male) as buyers and 3 (2 male, 1 female) as merchandisers.

**Table 3 Gender Distribution Of Interviewees**

<b>Occupational Role</b>	<b>Female</b>	<b>Male</b>	<b>Total</b>
Designer	10	–	10
Buyer	6	1	7
Merchandiser	1	2	3
Total	17	3	20

The sample comprises a total of 16 companies: 13 high street retailers, 2 suppliers for high street retailers and 1 manufacturer of branded clothing. While the general structure of the sample in terms of the ratio between the three occupational groups can be seen in Table 4 on the following page, the categories used to describe respondents’ occupational roles are not as clear-cut as they may seem. Two interviewees, Tanya and Kim, occupy dual roles (UK merchandise controller/buyer and product developer/buyer, respectively), whereas two other respondents, Rita and Anne, occupy sub-categorical or ‘overarching’ positions, i.e. fabric buyer and fashion director, respectively. Moreover, as the discussion in Chapter 6 shows, the division of labour and the role content associated with these key occupational groups varies between companies.

The variations in practitioners’ ‘bundles of tasks’, to use Becker’s (1982) term, also express themselves in the power relationships between designers, buyers and merchandisers and, by extension, in the organisational structure of companies.

Subsequently, firms were divided into three groups: design-led, buying/design-led and buying-led companies; the labels attached to each company follow respondents' own explicit or implicit definition.<sup>34</sup> The prefix 'design', 'buying/design' and 'buying' indicates which occupational group is most influential in shaping a company's garment range. It is interesting to note that non of the respondents has identified her/his company as merchandising-led. Instead, as we shall see in Chapter 6, the data suggest that it is the power dynamics between the designers and buyers which defines the type of organisational set-up of a company although the shaping and selection of garment ranges involves the cooperation of all three key occupational groups. This can be clarified by looking at some concrete examples. In companies that have been categorized as 'design-led' the designers are the occupational group whose choices determine the characteristics of the product range to a greater extent than buyers' and merchandisers' decisions. In Tanya and Eric/Tim's companies, for instance, although the design teams merely consist of two designers each, the balance of power is biased in favour of the designers and the great majority of these companies' garment ranges are designed in-house. Kate, on the other hand, is the only designer in her company. Even though she supplies some of the design ideas, the bulk of the range is based on 'bought in' designs, i.e. manufacturers' sample garments, chosen by the buyers. Moreover, Kate's position *vis-à-vis* the companies' buyers is not very strong and subsequently her company has been classified as buying-led.

**Table 4 Ratio Of Interviewees And Companies According To Organisational Type**

<b>Occupational Role</b>	<b>Design-led companies</b>	<b>Buying/design-led companies</b>	<b>Buying-led companies</b>
Designer	3	3	4
Buyer	4	2	1
Merchandiser	2	1	—
Total no. of interviewees	9	6	5
No. of companies in sample	7	5	4

Thus, 'design-led' does not mean that companies religiously follow trends set by top designers, but rather that these retailers largely rely on their own in-house design teams to create the style and brand image of the company. Likewise, the description 'buying-led' indicates that it is the buyers' selection of products that establishes the companies' looks. It is therefore a combination of factors, i.e. the percentage of the range that is designed in-house and the power relationships between the three occupational groups, that determines the organisational set-up of a company.

Following this categorisation into 'design-', 'buying/design-', and 'buying-led', the sample can be divided by using interviewees' occupational role and the type of company they are working for as indicators. Thus, Table 4 shows that the sample consists of 7 design-led, 5 buying/design-led and 4 buying-led companies and that 9 respondents were working for design-led retailers, while 6 and 5 respondents respectively, were working for buying/design- and buying-led companies at the time of the interview.

As mentioned previously, at the outset of my research I had hoped to interview representatives of all three key occupational groups of a company. Although I was unable to reach this goal, in four cases I was able to interview two people of the same company who directly worked together, namely Alicia/Lisa, Tim/Eric, Sarah/Rita and Zoë/May, whereas Kate and Carla have a retailer/supplier relationship. I also interviewed Anne who, as the fashion director of a group, oversees seven of its brands – including Zoë's and May's company.

Table 5 on the following page summarises some basic information about the respondents and their companies such as: respondent's 'name', occupational role, work experience, organisational type of the company, market position and target customer group. This table should thus be used as a point of reference when reading the subsequent data analysis chapters.

Table 5 also shows that design-, buying/design- and buying-led companies cater for different age groups. For example, buying-led companies' customers are the youngest in the sample and fall into the 15–30 age bracket, whereas buying/design-led companies attract slightly older customers aged between 18–35 years.<sup>35</sup> Women who shop at design-led retailers, on the other hand, span a far broader age range: from 20–70 years. The design-led companies in the sample are more diverse than the retailers in the other two groups so it is useful to divide them into two subcategories. One of these subcategories comprises Francis's and Tanya's companies, catering for the 20–40 and 30+ groups of women, whereas the other subcategory comprises the five remaining design-led retailers catering for the 35+ to 70 age range.

**Table 5 The Respondents And Their Companies**

Name	Current position	Work experience (in years) <sup>a</sup>	Duration of current employment	Company type	Market position	Target customer age group
Tanya	UK Merchandise Controller/ Buyer	10 years	2 years	Design-led Retailer	High end	30+
Rita	Fabric Buyer	9 years	4 years	Design-led Retailer	High end	45-70
Sarah	Designer	17 years	13 years	Design-led Retailer	High end	45-70
Eric	Senior Merchandiser	11 years	11 years	Design-led Retailer	High end	35-55
Tim	Buying Director	22 years	7 years	Design-led Retailer	High end	35-55
Anne	Fashion Director of Group	27 years	9 years	Design-led Retailer	High-middle end	20-65 <sup>b</sup>
Leah	Buying Director	11 years	18 months	Design-led Retailer	High-middle end	35+
Sophia	Designer	12 years	3 years	Design-led Retailer	High-middle end	35+
Francis	Buyer	7 years	12 months	Design-led Retailer	High-middle end	20-40
Vivian	Design Executive	15 years	7 years	Buying/ design-led Manufacturer	Middle	N/A <sup>c</sup>
Sean	Assistant Merchandiser	5 years	12 months	Buying/ design-led Retailer	Middle	18-35
Jane	Designer	N/A	12 months	Buying/ design-led Independent Label	Middle	18-30

Faye	Design Manager	9 years	18 months	Buying/ design-led Retailer	Middle- cheaper end	20-35
Alicia	Buyer	7 years	7 years	Buying/ design-led Retailer	Middle- cheaper end	15-25
Lisa	Assistant Buyer	4 years	4 years	Buying/ design-led Retailer	Middle- cheaper end	15-25
Kate	Designer/ Trend Co-ordinator	2 years	12 months	Buying-led Retailer	Middle- cheaper end	18-25
Kim	Product Developer/ Buyer	10 years	2 years	Buying-led Retailer	Middle- cheaper end	15-25
Carla	Designer	13 years	12 months	Buying-led Manufacturer	Cheaper end	N/A <sup>c</sup>
May	Designer	7 years	9 months	Buying-led Retailer	Cheaper end	20-30
Zoë	Designer	7 years	12 months	Buying-led Retailer	Cheaper end	20-30

<sup>a</sup>: Interviewees were not explicitly asked about their work experience and number of employers. The entries in those columns are based on indirect information gathered from respondents' accounts of their careers.

<sup>b</sup>: This unusual breadth of target customer group can be explained by the fact that it comprises seven different brands. The youngest brand (20-30 years), however, is located on the cheaper end of the market (see entries for Zoë and May).

<sup>c</sup>: I did not include manufacturers (i.e. Vivian and Carla) in this category since they often cater for a variety of retailers with different end-consumer groups.

Table 5 also demonstrates how companies' organisational structure correlates to their market position. Generally, design-led retailers tend to target the high and high-middle end of the market, whereas the market position of the buying/design-led companies ranges from the middle to middle-cheaper market level. There is an interesting correlation between age and price level in this category: the retailers at the middle-cheaper end target the lower end of the age group, whereas the retailers in the middle market target the older end of the age group.<sup>36</sup> Finally, in line with this price level/age correlation, the buying-led companies in the sample are situated at the middle-cheaper and cheaper end of the market and target the youngest customer

group. One explanation for this link between customer age, market position and type of company is the average level of disposable income available to customers of a certain age group. The Family Expenditure Survey (2000: 39) suggests that, on average, women between 30–65 years of age spend the most money per week on outer wear, namely £8.40, whereas women under 30 spend £7.30, and those aged between 65–75 a mere £5.10.

Looking at columns 3 and 4 in Table 5 we can also see interesting differences between the three company types in terms of interviewees' average work experience and the duration they have been working for their present employer. We can see that interviewees who are working for design-led retailers not only have the greatest work experience overall, but also tend to have been working for their present employer for the longest time. The data suggest that on average interviewees who work for design-led companies have been staying with their present employer for 5.72 years, compared to 3.58 years for buying/design-led companies and 1.13 years in buying-led companies. Moreover, there seems to be a correlation between interviewees' work experience and the preferred organisational structure of the company they work for, since interviewees of design-led companies have not only been staying longest with their current employer, but have also the most work experience, namely an average of 14 years, compared to 8 and 7.8 years for buying/design-led and buying-led interviewees respectively. This correlation between interviewees' work experience and the type of retailer they are working for also indicates that there is a match between interviewees' own age group and the target customer group of their respective companies.

#### **4.10 Data Analysis**

Interviews were transcribed throughout the fieldwork. Although I read and re-read the earlier interviews to assess the usefulness of my interviewing guide and to look out for and incorporate emerging themes, the actual analysis of the interviews only started in December 2001 after the last interviews had been conducted and transcribed.

Once transcribed, the interview data were prepared for transferral to QSR4 NUD\*IST.<sup>37</sup> My reasons for using NUD\*ST were threefold. It was easily available, its built-in tutorial makes it relatively straightforward to learn and it had been recommended by some of my colleagues. Moreover, I had been briefly introduced to this computer package during my MSc and I was left with the impression of it being very useful for managing qualitative data. In fact, the ability to attach memos and context-sensitive annotations to nodes proved particularly useful in the early stages

of my analysis when I would jot down all the ideas that came to mind on a particular theme. Using NUD\*ST brought some structure to the fairly 'messy' business of analysing qualitative data and helped me to organise some of my initial ideas.

I employed a complex coding system (see Appendix D) which allowed me to examine interviewees' accounts in great detail and proved to be very useful in the in-depth analysis of the data. My coding systems followed the six categories/topics set out in the interviewing guide. I then introduced a large number of subcategories to draw out the similarities and differences in interviewees' accounts in greater detail (May, 1993: 105). For example, the theme 'forecasting' was divided into 16 subsections. This subdivision, for example, allowed me to draw connections between companies' organisation structures and the types of inspirational sources they most commonly used (see Chapter 5). While useful at the time, the large number of nodes proved less practical during analysis and writing up (see Chapters 5 and 6) because it fragmented the data too much and inhibited an in-depth analysis. Although NUD\*ST allows one to see coded text fragments in their context, I decided that it would be more useful to 'collapse' some of the smaller subnodes to form larger categories for analysis. Thus, the flexibility to change one's coding system at any point was another advantageous feature of using QSR4 NUD\*ST. Once greater coherence had been re-established, NUD\*ST also proved a useful tool for cross-referencing themes and for exploring links within the data, by running a number of word and phrase searches. For instance, by running searches for words such as 'creativity', 'commercial' and 'money' I found evidence of differences in outlook between buyers, designers and merchandisers, and could trace patterns of how buyers described themselves and how they referred to designers (see Chapter 6). In this way, evolving themes during the analysis could be included without going over each interview transcript individually or including yet more nodes and subnodes.

As a research tool NUD\*ST allowed me to build more complex coding systems than manual methods and facilitated the construction of theory in a more systematic and organised manner (Buston, 1997: 10.5).

#### **4.11 Limitations Of Study**

The main shortcomings of this study lie in the characteristics of the sample and the restriction to one research tool, i.e. semi-structured interviewing. Although a sample of this size can be criticised for being unrepresentative and for not being adequate for providing conclusions that can form the basis for generalisations about culture industries *per se*, I believe that it is not the size, but the composition of the sample that poses problems. I would have liked to interview a designer, buyer and

merchandiser from all retailers in the sample instead of having access to only one or, on occasion, two representatives per company. Even though I have gained rich, detailed data from the people I have interviewed, I think that interviewing a designer, buyer and merchandiser from each company would have yielded more balanced and complex insights into the division of labour and power between the key occupational groups. Unfortunately, gaining access proved difficult and for similar reasons I had to abandon the use of one of the research tools I had anticipated using, i.e. observation; I also had to discard my hopes of interviewing representatives of all three occupational groups for each retailer.

Access problems meant that I had to base my research findings on data that could not be verified through internal cross-referencing, either by observation or by interviewing more than one person per retailer. Instead, inferences and conclusions were drawn by comparing, for example, designers' accounts and contrasting their observations with those of the buyers and merchandisers in the sample. Similarly, emerging themes from interviews with respondents working for buying/design-led companies were compared and contrasted with those from the other two categories. However, the problem with this method of analysis is that the sample itself is distributed unevenly across occupational as well as organisational categories. All in all, the number of designers and the number of respondents working for design-led companies exceeded those of the other groups in the sample. Subsequently, my analysis is slightly biased towards design-led companies and designers.

Another criticism that could be levelled against this study is that, although I am analysing fashion forecasting, I was not able to interview any fashion forecasters. I feel that this is particularly problematic since interviewees themselves suggested that I ought to contact forecasting agencies to get deeper insights into the initial stages of the forecasting process, i.e. the stages prior to retailers' and manufacturers' involvement in the process.

I contacted the major UK-based forecasting agencies, but was unable to gain access to any of them. Indeed, to my disappointment, 'snowballing' techniques did not work here. Although one of the interviewee's (Sarah) allowed me to use her name when I contacted one of her company's forecasting agencies, I met with no reply. Similarly, I was not able to use Vivian's contacts at another major forecaster either. The only first-hand information I was able to obtain was by looking at forecasting companies' websites which allowed limited, time-delayed access to some of their reports.

My decision to limit my study to industry practitioners and therefore exclude consumers may also be seen as a limitation. However, restrictions on time and

resources made it necessary to define the boundaries of my research project and, faced with the choice of interviewing a very small sample of industry practitioners and consumers of fashion, I thought it more worthwhile to concentrate on one side in more depth than to superficially engage with both. In addition, the greater number of consumption-related studies in the literature on fashion and the 'gap in the literature' in terms of fashion production discussed in the Introduction guided my choice of studying fashion production rather than fashion consumption.

Despite these shortcomings I believe that the data I obtained were sufficient to fulfil the prime directive of my research – to provide insights into how practitioners carry out fashion forecasting and garment selection at the level of high street womenswear retailers. I therefore believe that my empirical investigation of forecasting and selection processes in the womenswear industry makes a valuable contribution to our sociological understanding of the fashion industry. Indeed, it could be said that the uniqueness of this research lends weight to its findings which, though far from being representative of the industry as a whole or able to offer a definitive base from which to make general inferences about other culture industries, nonetheless make important advances into an under-researched field of study and, as such, can provide a springboard for future research in this area.

## **Summary**

In this chapter, I have outlined my research objectives, design and methods and have traced their links to the sociological literature on research methodology. I have not only demonstrated how I arrived at my themes of interest and research questions, but how a continuous reassessment of their usefulness and workability contributed to the evolution of my interviewing guide and my skills as interviewer. I have also shown how the most challenging aspect of my fieldwork experience, namely my problems of gaining access to respondents, restricted and shaped my research project. Finally, I have provided a detailed description of my sample, which not only defines the ratio between the three occupational groups but also provides a preliminary introduction to the categories used to describe the companies in the sample. This account of the sample's composition provides the backdrop to the following two data analysis chapters.

## Notes

1. It is interesting that Williams (1976, in Hammersley, 1990: 178) argues that participant observation is 'the necessary and sufficient method for symbolic interactionist research', while Blumer (1979), even in his later account of naturalistic research, emphasises the significance of collecting and analysing human documents rather than the merits of observation (Hammersley, 1990: 180).
2. Fielding (1993) draws some interesting parallels between symbolic interactionist and positivist concerns. He maintains that both paradigms assume the existence of 'truth' or 'facts'; otherwise, concerns would not be paid to issues such as fabrication. For this reason, he refers to interactionism as 'a kind of positivism-plus, where the plus is a full attention to the context of the interview as a form of interaction' (Fielding, 1993: 151).
3. In reality, most researchers employ a combination of interview styles (May, 1993: 92; Denzin, 1978: 117). For example, I have used a fairly structured format to elicit information on interviewees' biographies, while employing a flexible format in the discussion of the other topics. Thus, depending on one's research topic or subtopics, one has to decide which format is the most appropriate.
4. May (1993: 96–7), drawing on Moser and Kalton (1983), suggests that there are three necessary conditions that must be fulfilled to conduct a successful interview: (a) accessibility, (b) cognition, and (c) motivation.
5. The title 'respondent' itself reveals the passive role allocated to those answering the questions for they are merely able to respond within a set frame of possible answers and are thus not able to freely and naturally express themselves in their own frame of reference.
6. This is very similar to theoretical sampling, i.e. the simultaneous collection and analysis of data, advocated by practitioners of grounded theory (Charmaz, 2000: 519).
7. In contrast, researchers employing semi-structured interviews have a slightly more worked-out interviewing guide, which lists some of the core questions.
8. Granting an interview should be seen as an interviewee's 'gift of time and information' to the interviewer (Denzin, 1978: 120).
9. Zweig (1949: 1–2 cited in Oakley, 1981: 52) has abandoned the use of formal questionnaires in his study on *Labour, Life and Poverty* in favour of 'casual talks ... on an absolutely equal footing'.
10. According to Rubin and Rubin (1995: 2), the third component of qualitative philosophy sets ethical standards and helps to define what is interesting in research, thereby reflecting the quality of enquiry.
11. Although Finch (1984) and Oakley (1981), for example, advocate dialogue-based forms of interviewing, I agree with Denzin that there are some fundamental differences in the roles of the researcher and the researched. For instance, it is the researchers who initiate contact by approaching their chosen subjects with a specific agenda. Thus, their prime motive – to talk about a specific issue that is relevant to their research project – means that researchers will always guide the conversation to some extent. While this does not mean that researchers refuse to engage in emotional 'reciprocity', it does draw attention to the fact that interviews are purposeful conversations aimed at fulfilling the aims of the researchers.
12. Benney and Hughes' (1994) convention of equality draws on Simmel's notion of sociability in which he stresses that the goals of sociable meetings can only be achieved if all those characteristics on which inequalities are based are excluded from them.
13. However, some researchers prefer to take a more aggressive stance and are happy to abandon the rules of polite conversation in favour of confrontation.
14. The assumption that the information one gains in interviews may not always be accurate is based on Simmel's (1950) essay on the stranger whose history we do not know, and whom we only meet in a fleeting encounter, which is unlikely to be repeated. The transitory nature of this encounter opens up possibilities to 'fabricate "tales of the self" that belie the actual fact, and the other party lacks objective evidence to counter such tales' (Denzin, 1978: 125).
15. This is based on my assumption that the creation and production of economically successful garments is the prime objective in competitive consumer industries, such as the womenswear industry; a view sustained by my data in which respondents repeatedly point to the importance of commerciality, as can be seen in Chapter 6.
16. My wish to 'validate' information was not so much based on my belief that interviewees would fabricate information or provide me with socially expectable accounts, but rather with my worry that they might follow the 'company line' (Rubin and Rubin, 1995: 67). Indeed, I found that when I asked

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direct questions about areas of conflict that arise during the selection processes, many interviewees stated that their working environment was very conflict free because the company valued teamwork. A good example of this is Adam's statement:

I know it all sounds cheesy but, it is very much, this place is very much about team work. There is no one person or two people who can say "This is no good! We won't do it!" That doesn't happen ... so, and that, that's one of the biggest plus points about working somewhere like this. That you don't have that hierarchical, you know, view taken. You know, everyone's opinion is considered. As long as you've got an argument to back up why you do feel that way.

While other interviewees also emphasised the importance of teamwork in their companies, most of them could also cite examples of potential areas of conflict – it would thus have been interesting to observe real instances of decision making in Adam's company. (For a more detailed discussion of this, see the section on 'conflict' in my discussion of the interviewing guide in this chapter and my analysis of teamwork and conflict in Chapter 6.)

17. Examples for these are [www.industryforum.net](http://www.industryforum.net), [www.wgsn-edu.com](http://www.wgsn-edu.com), [www.modeinfo.com](http://www.modeinfo.com), [www.fashioninformation.com](http://www.fashioninformation.com) as well as the homepages of various leading womenswear retailers.

18. For example, I learned commonly used abbreviations for trend and fashion shows, I got to know what 'lab dipping' involves and what 'swatches' are. The acquisition of cultural sensitivity is also of importance in terms of understanding the discrepancies in the taken-for-granted-meaning of words/assumptions (Rubin and Rubin, 1995: 8-9) and avoiding 'the first error in an interview – tacit assumptions of understanding' (Denzin, 1978: 121).

19. This corresponds with another of Denzin's (1978: 131) suggestions of establishing 'intent and purpose' through one's style of dress and to dress in a way which 'communicates who *you* are with respect to *them*'.

20. Although this may help to explain why I managed to arrange more interviews with women than with men it must be pointed out that, at least at this level of womenswear retailing, the number of women exceeded that of men. Moreover, based on the contact names I was given when phoning companies' switchboard at the outset of my research, it seems that there are some interesting gender divisions. The majority of men whose names I had been given worked as merchandisers, like Adam and Eric, and a few also occupied buyers' roles. Designers, on the other hand, were almost exclusively female. This division is particularly interesting when considering the differences in occupational outlooks that will be discussed in Chapter 6, where we will see that designers are described as creative, while the merchandisers' role is defined in terms of its commerciality. Thus, the stereotypical gender traits associated with men and women may find an expression in the occupational stratification of men and women within the fashion industry.

21. It was not only when interviewing senior members of staff that I felt inexperienced in terms of being a researcher and an academic, but I was also aware of my inexperience in terms of entering a commercial organisation. All but one of the failed interviews took place at the interviewees' place of work – date, time and place of interview were chosen by the interviewees.

22. For example, talking about her company's target customer group, Sarah told me that her mother regularly buys garments from this company and she was interested in finding out whether my mother also shops there.

23. I tried to circumvent this restriction by appealing directly to one of the company directors, but unfortunately, yet not surprisingly, my letter went unanswered.

24. This method is also sometimes called 'chain referral' sampling (Lofland and Lofland, 1995: 38)

25. It is interesting to note that Puwar (1997), in her study of female MPs, describes a number of similar access problems.

26. The introduction prior to the commencement of the interviews closely followed Lofland's (1971: 86-7) suggestions and included the following points: explanation of the purpose/nature of the research and why the particular person has been approached for an interview, assurances of anonymity and confidentiality, interviewee's right to determine the interview at any point or to refuse to answer a question, permission to record the interview and some background information about myself.

27. While grounded theorists would reject this practice, other qualitative researchers such as Lofland (1971: 77) stresses that 'it is entirely proper to locate and to read books and articles on the particular, concrete matter of concern. In reading, one can discover what others who have written about and

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studied this matter found puzzling and what kinds of questions they have asked'. However, basing one's questions on the literature can be misleading. For example, Braham (1997: 126) uses the term 'store buyers' nightmare' to refer to buyers' fear of selecting garments that will not sell. I assumed that this phrase was actually used by buyers and hence asked a number of buyers if they had ever experienced the 'store buyers' nightmare'. Although interviewees could guess what I meant, it clearly transpired that this was not a term they would use. Consequently, I rephrased my question in subsequent interviews.

28. I closed the interviews by thanking interviewees for their time and for talking to me. I then offered to send them a copy of the interview transcript. Finally, I asked whether they knew of anyone who might be interested in talking to me.

29. The interviewees were a textile consultant, one of the managing directors of a small manufacturer of branded clothes and one of the designers employed by this manufacturer. I gained access to these interviewees through the referral of one of my former supervisors.

30. Robson (2002: 275), for example, lists five categories of questions that should be avoided in interviews: long questions, double-barrelled questions, questions involving jargon, leading questions and biased questions.

31. Unfortunately, the interview with the buyer was one of the failed interviews due to recording problems which I was unaware of at the time of the interview.

32. Although I have concentrated on womenswear retailers, my sample includes two supplier-based designers and one designer who was working for a manufacturer of branded clothing. This was due to the problems of gaining access to respondents. I was therefore very grateful when interviewees suggested people to me who they believed would be willing to participate in my research.

33. All the interviews included in the sample were conducted in the British 'capital of fashion', i.e. London or Greater London, where the majority of womenswear retailers have their headquarters.

34. Since the question of whether a company is design-, buying/design- or buying-led was only added later on during fieldwork once the importance of this distinction had crystallised from the earlier interviews, I was only able to obtain explicit information with regards to this categorisation from 16 respondents. Inferences were made in the cases where respondents had not themselves applied this label. For an explanation of these categories see Chapter 6.

35. Carla's and Vivian's companies are not taken into account here since manufacturers can cater for diverse retailers and hence cover a wider end-customer group.

36. Slight exceptions to this are Jane's and Faye's companies who cater for slightly younger and older customer groups, respectively, than the majority of retailers within their bracket. The reason why Jane's company attracts a younger customer despite its pricier goods is that the company manufactures branded clothing, which is sold alongside such established brands as Firetrap, Levis and Diesel.

37. Preparing documents for their transferral to NUD\*ST means saving them in text only format, dividing the text into unites by inserting hard carriage returns and by providing headings to add some structure to the text unit.

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## Chapter 5: The Interplay Of Sameness And Differentiation – An Appraisal Of The Working Practices Of Fashion Retailers

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[Fashion] consumption is a token in the game of social distinction for consumers in the same way as production is for its producers. (Robbins, 1992: 123)

Based on interview data with designers, buyers and merchandisers of high street womenswear retailers, this chapter examines the variations in their working practices. Chapter 3 analysed the differences in production and labour systems between various fashion subsystems and established a connection between the fashion level of a fashion system and its organisational structures; this chapter builds on these insights and investigates whether retailers' fashion level influences their working practices in a similar way. Therefore, differences between the three retailer categories (design-led, buying/design- and buying-led) are traced in terms of (a) their fashion forwardness, and (b) the fashion level and other characteristics of their target customer group. Particular attention is paid to retailers' sources of inspiration, which are divided into seven categories: 'catwalk shows', 'forecasting agencies', 'fabric and trade shows', 'buying trips', 'UK retailers', 'celebrities and the media', 'street fashion and other'.

The first part of the chapter establishes the differences between retailer categories. The focus then shifts to the question of whether the structure of the fashion industry and its working practices foster a certain degree of sameness among clothing retailers. The vital factors here are the role of manufacturers in facilitating similarly between retailers and retailers' practices of copying trends or garments from the catwalk and/or other retailers. The chapter finishes with an examination of the differentiation strategies employed across the retailer categories. As shown in Chapter 3, product differentiation is used by manufacturers to combat demand uncertainty and to gain competitive advantages over other manufacturers. In this chapter it will be shown that differentiation is also an important competitive strategy for retailers as the British clothing retailing market is a very competitive trading environment.

The theme running throughout this chapter is that of differentiation and similarity – a topic of enquiry commonly associated with the work of Simmel (1957) in his essay on fashion. This discussion of the womenswear retailing industry demonstrates that, almost one hundred years after Simmel originally published his

essay in 1904, the dualistic tendencies of similarity and differentiation continue to influence the current fashion scene.

### **5.1 The Importance Of Being Different: Life-Style Retailing, Branding and The Crisis of Marks & Spencer**

While people's desire to achieve social distinction through clothing is as old as fashion itself, the concept of life-style consumption only properly emerged in the 1980s and was echoed on the retailing side in the 'retailing revolution', which saw the rise of the new retailing concept of 'life-style' or 'niche marketing' (du Gay, 1996: 97). The term 'market niche' refers to the relationship between consumption patterns and consumers' age, income, occupation, lifestyle, etc. (Braham, 1997: 152). An important step in the realisation of nice marketing was retailers novel use of own-brands. While retailers previously used own-brands as a way of communicating their price consciousness, retailers began to use own-brands as a means to add value to their products – this repositioning of own-brands in retailing significantly challenged the established manufacture–retailer power relationship (Moore, 1995: 20).

Life-style marketing encompasses more than the tailoring of products to a specifically defined customer group; it includes the overall shopping experience – store image, visual displays, music, sales staff, etc. (DeNora and Belcher, 2000). By offering the complete 'image package' retailers' encourage consumers to transform themselves into the consumer 'types' on offer in store. In addition, window displays can persuade or dissuade potential customers from entering the store. Thus, retailers can employ semiotic strategies to filter customers (DeNora and Belcher, 2000: 87). This observation is shared by Crewe and Lowe (1996) who argue that clothing retailers' particular differentiation strategies are related to the 'demographics and lifestyle perception' of their target customer group. Retailers who cater for a young market, for example, will build their retailing concept around a strong image and brand name, while retailers who are targeting an older market may do so with 'understated, quality classics' (Crewe and Lowe, 1996: 277).

The importance of offering consumers something different that allows them to assemble 'a lifestyle (or lifestyles) through personalised acts of choice in a world of goods and services' (du Gay, 1996: 100) is keenly felt amongst industry practitioners.<sup>1</sup> However, despite the realisation of the importance of a strong brand that provides customers with a distinctive product range, many womenswear retailers offer very similar ranges of clothing. This tension between differentiation and perpetual sameness of high street clothing can be seen in the following statement:

*Sean:* I think a lot of people want to elevate themselves away from the high street. They want that difference, they don't want to look the same as all their friends ... I think ... personally, that the middle market is saturated, there are too many different retailers in there and I think some of them will get wiped out.

*(Assistant Merchandiser, buying/design-led retailer)*

While Sean maintains that it is important for customers to 'not look the same as their friends' he also draws attention to the fact that, in reality, much of the high street clothing is still relatively undifferentiated. This criticism of the high street is echoed by Faye, a designer for a large buying/design-led company, who maintains that 'everybody is just chasing the same end and ... the differentiation between different brands is hardly noticeable'. Indeed, according to Robinson (1999: 20) 'many retailers remain merely sellers of brands without their own distinctive handwriting'.

The problem of weak branding has become particularly apparent amongst mid-market retailers whose garments often lack the aspirational merits and strong appeal of designer brands. The absence of a unique style of 'handwriting' not only discourages customer loyalty, but subjects retailers to greater demand uncertainty and may be responsible for a decrease in their market share. Thus, despite the continued dominance of large retailers over the womenswear market towards the end of the 20<sup>th</sup> century, mid-market retailers – such as Marks & Spencer – are now under increasing pressure from value retailers and (foreign) 'medium-sized fashion-led chains which are, through their product offerings, bridging the gap between designers and the large retail chains' (Wilson, 1999: 382).

A look at Marks & Spencer's troubles shows just how important a strong brand image and an understanding of one's customers is in order to be successful in the womenswear market. Marks & Spencer first ran into difficulties in 1998 when their autumn/winter collection - which has come to be known as their 'grey range' - failed to reach expected sale figures. While the company had reported its all-time profit heights of £1.2 billion earlier that year, the wrong kind of garments and the fact that they were over-priced meant that sales were slow and lower than expected. This resulted in excess stock and subsequent mark-downs that meant substantial losses for the company – so much so that the company's chief executive Salsbury issued a profit warning at the beginning of 1999 (Bevan, 2001: 201). Indeed, according to the Financial Times Marks & Spencer suffered a profit loss of 50 percent in 1999 compared to the previous year (Murphy, 1999: 381). In addition, the company's overall market share in the clothing and footwear sector dropped from 14.4% in 1999, to 13.1% in 2000 and 11% in 2003. While this decline may not seem dramatic,

it is important to point out that the company does not publish separate figures for womenswear, menswear, childrenswear and footwear which combined make up the 'clothing and footwear' data. However, drawing on retail industry experts Ryle and Mathiason (2001: 1) speculates that in spring 2001 alone Marks & Spencer's womenswear sales declined by 12%.<sup>2</sup>

Marks & Spencer's loss of profits and market share in the late 1990s is commonly attributed to three interrelated reasons: the company's corporate culture, its failure to understand its customers and its insistence on 100% own label sales.

Where other companies moved away from inflexible hierarchical structures and 'top-down' corporate decision making process, Marks & Spencer was characterised by its 'bloated' and inflexible bureaucratic and hierarchical management style which, if not outright hampered innovation, at least made it difficult and time consuming to reach decisions and implement changes. Laurance, for instance, states that Marks & Spencer's complex corporate structure is being 'worthy of the old Soviet Union, every decision was filtered through a series of committees' (Laurance, 1999: 3).

Moreover, Rankine blames Marks & Spencer's corporate culture and the company's internal power struggles for having given rise to 'an inward-looking ... [approach which] also bred an arrogance that has left it detached from its customers and its competitors' (Rankine, 1999b). Whereas before it was almost unheard of to publicly criticise Marks & Spencer, which had long since turned into a 'British Institution' that could do nothing wrong in the eyes of the million of its loyal customers, customer opinion changed radically in 1999 (Bevan, 2001: 202-3). Norgrove, the company's former director of strategic planning, described the shift in customers' opinion as follows:

There was a crystallisation of people's concerns that had been building up over a period. It suddenly became acceptable to criticise weakness in a way it had not been before. There was a time when you would ask a focus group to criticise Marks & Spencer and they would say: 'No, we can't do that, it would be like criticising the Queen or my grandmother. (Norgrove in Bevan, 2001: 206)

Another area that attracted substantial criticism was the 'St. Michael' label which had lost much of its former appeal. While St. Michael used to be associated with stylish, good quality clothing at an affordable price, the brand was now perceived as dowdy and unimaginable. Worse still Marks & Spencer, the former trend-setter of industry standards in clothing quality, increasingly sold garments of inferior quality at higher price points than its competitors. This put the company in a

difficult position: it neither catered for the increasing numbers of 'label conscious' customers willing to spend their money on fashionable, aspirational brands nor did its pricing policy entice value conscious customers. This meant that Marks & Spencer's indistinct 'middle of the road' image appealed to ever smaller numbers of customers. Moreover, the company's slogan 'exclusively for everyone' shows just how much Marks & Spencer was out of touch with its customers' desires. As the Guardian observers:

The science of shopping has changed. No one would now invent a store that sells lingerie alongside lentil soup. The Great British shopper does not want vast stores full of endless racks of clothes, unless they come cheap in a discount warehouse. Our love affair with labels does not extend to the rather dull little white one in the back of M&S clothes. (The Guardian, 13.10.2000: 27)

The difficulties experienced by Marks & Spencer highlight the importance for clothing retailers to adopt differentiation strategies, i.e. a strong and distinct brand image, to consolidate their market position. Rather than using own brands in a pre-1980s way to advertise price consciousness, modern retailers have to offer consumers a distinct style or look to survive in the market. This cannot be achieved by providing customers with rows upon rows of similarly styled garments – today's customers desire distinctiveness - they do not want to look just like their neighbours. As we have seen in section 2.6 in Chapter 2, Murray (1989: 44, 49) for instance, has argued that consumption is no longer emulative but has come to resemble a striving for distinction. This point is also made by Bourdieu (1984), who looked at the interrelationship of economic and cultural capital, which he used as markers for mapping '*tastes and preferences* which correspond to educational level and social class, in short ... a model of class *life-styles*' (Jenkins, 1992: 138, original emphasis). According to Bourdieu, people who share a similar 'class of conditions of existence' are united by taste, while at the same time their standard of taste distinguishes them from those with different experiences/ background. In his analysis of the field of fashion production and consumption, Bourdieu (1975)<sup>3</sup> shows that the fashion industry produces temporal distinction on a synchronic level, by producing clothes that fulfil consumers' desire for social distinction in any given season, as well as on a diachronic level, i.e. by producing garments that differ from the ones of the previous season (Robbins, 1991: 124).

Since their problems first became apparent, Marks & Spencer has employed a number of strategies to improve its position in the market. For example, in 2001 the decision was taken to close the company's Continental European and Direct

Catalogue businesses and to sell their two US firms. While Marks & Spencer continues to operate stores in the Republic of Ireland and its franchise businesses world wide (125 franchises in 26 countries), it is now focusing on its UK operations. The company has spent £63.3m in 2000 and £26.5m in 2001 on the restructuring, streamlining and 'revamping' of its UK stores. By reducing Marks & Spencer's retailing operations to the UK market the company hopes to increase its flexibility and focus.

Moreover, Marks & Spencer has introduced extensive internal changes to its UK business, which are aimed at reducing layers of interface within the company. 'Where before, for example, a dress might pass between separate groups for buying, selling and distribution, now all these functions are united- together with the relevant finance, IT and personnel- into one ladieswear unit. It's a big change... we can adjust more rapidly to market changes.' (Marks & Spencer's Annual Review, 2000: 16). Not only are these measures hoped to increase the company's flexibility, but to decrease lead-times and costs. To this end Marks & Spencer has also made changes to its supply chain: whereas until September 1999 the company sourced at least 90% of its goods from the UK the majority of goods are now sourced overseas (Market Assessment International, 2000: 90).

With the restructuring of its buying operations the company also aims to regain its focus on customers. Given that regaining consumers' confidence and interest is crucial for Marks & Spencer's future, the company has formed a Customer Insight Unit and states in its Annual Review (2000: 1) 'We're getting closer to our customers - listening to what they want and changing the way we work.' The company's concern to deliver garments customers want is also reflected in their bid to test out their clothing ranges on a select group of 50,000 'loyal' customers months before the product becomes available in store. While the practice of running trials, i.e. of sending garments into companies best selling stores to gauge customers' reactions, is common within the womenswear industry it is unusual to send out pre-season catalogues to customers to test their perception. Holmes, Marks & Spencer's head of UK retailing, explains this move as follows:

Our buying teams have lost some confidence in the past couple of years, and to have real, quantitative feedback on those lines ... gives us enough warning to modify our buying to meet demand. [...] by sending this to 50,000 of our most loyal customers, we hope to get more concrete feedback. The preview catalogue is not our final range. It is a very specific tool that ... is particularly relevant where the teams are uncertain. We can get behind the big lines ... We can stop the weaker ones. Even if we have fabric

commitment we can perhaps change it to another line.’ (Holmes in Ryle, 2001: 1)

Besides the introduction of pre-season catalogues as a means of testing customer reactions to new garment ranges, Marks & Spencer’s first ever marketing department and marketing director were also introduced as recently as 1999/2000 (Robinson, 1999: 21). This an interesting development, since the company used to pride itself for its lack of advertising and marketing. That this attitude has changed dramatically can be seen by the fact that £39m was spent on additional marketing in 2000. The key areas were advertising and visual merchandising in store, which accounted for £13m and £14m respectively (Marks & Spencer Annual Report 2000: 2). However, despite the large sum of money spent on advertising, the company’s first major advertising campaign, which featured size 16 model Amy Davies undressing and shouting ‘I am normal’ on top of a hill, may have arguably alienated more consumers than it gained new ones (Bevan, 2001: 228). Moreover, the company’s use of a variety of customer research consultants only added to its confused customer image and ineffective approaches to win customers back. Bevan (2001: 229), for instance, shows that the very notion of a ‘core customer’ was put into question by a company executive who instead argued that there were ‘eleven different types of a M&S customer’.

In addition to the above measures, Marks & Spencer has also sought to boost its sales and company image by introducing sub-branding which, given the importance of niche marketing and life-style retailing outlined above, has come to be seen as an essential prerequisite in today’s market. ‘M&S is having to fight the increasing challenge from brands and in mid-market retailing, sub-branding is becoming a crucial weapon’ (Robinson, 1999: 21). Indeed, sub-branding is particularly important for a large retailer who does not sell third-party brands, because it offers the possibility to address the demands of various consumer sub-groups and to widen its customer base without alienating core customers. Department stores, for example, aim to achieve this through a mix of own-label and branded clothing.

Thus, Marks & Spencer now complements its traditional St. Michael brand with a number of new sub-brands such as *Per Una*, for instance, which caters for fashion conscious 20-35 year old women.<sup>4</sup> Launched in May 2004, the company’s most recent addition to its portfolio is *Due*, a branch of the *Per Una* collection, which aims to break into the young fashion market dominated by companies such as Top Shop and New Look.

As well as adding value to their brands through sub-branding, over the recent years womenswear retailers have also sought to boost their image by forging links with top designers. Dorothy Perkins, for example, has aligned itself with Clements Ribeiro, Top Shop draws on Hussein Chalayan, while Amanda Wakeley designs a collection for Principles and Bhs sports a range by Owen Gaster (Gillian, 1999). Interestingly, Marks & Spencer has been a trend setter in establishing links between the high street and catwalk designers - in the past, it has used Paul Smiths, Betty Jackson and Tania Sarne as consultants for their clothing ranges, while the company's up-market *Autograph* range draws on design input from Katherine Hamnett. Yet, while other high street retailers are eager to improve their own brand image through their association with top designers and subsequently advertise the linkage, Marks & Spencer's policy to only sell their own brand(s) has prevented them for some time from making use of their connection with catwalk designers. However, the fact that Marks & Spencer still has not recovered from its downward slide may force the company to rethink some of its policies and adopt a more aggressive strategy to create a strong and desirable image. Radice, Marks & Spencer's new head of womenswear retailing, has recently suggested that the company may undergo more radical transformations which will include further sub-branding as well as the introduction of concession style specialist shops, similar to the 'shop within shop' model advocated by traditional department stores (Finch, 2004: 20).

Having outlined the importance of branding and lifestyle retailing on a general level, as well as with particular reference to Marks & Spencer's fight to regain its prominent market position, and having briefly drawn attention to the fact that much of the high street womenswear retailing industry is still characterised not by segmentation but sameness of product, it is now time to turn to the data in order to look at interviewees' descriptions of how their companies strive to survive in the market. In order to do this, we will look at the differences between retailers in terms of fashion level and subsequently assess to what extent their level of fashionability relates to that of their target customer group.

## **5.2 Differentiation In Terms Of Fashion Level**

Retailers' position on the fashion/non-fashion continuum must be looked at from two perspectives: first, in relation to their overall fashion forwardness; and second, by looking at the split of their range into fashion and non-fashion garments. However, before we can even attempt to understand the influence of the fashion-level on retailers' working practices, we need to find out how fashion is defined. As we have seen in the Introduction fashion has traditionally been associated with class

distinctions (Simmel, 1957; Veblen, 1908), while writers such as Craik (1994: x) point out that there are numerous competing and co-existing fashion systems at work today. She argues that the existence of a plurality of fashion systems has undermined the influence of elite fashion designers and leading public figures who, up until the 1950s, used to dictate what was fashionable and what was not.

Although Craik makes an important point by arguing for the greater diversification and fragmentation of today's fashion, the data suggest that, at least at the high street level, 'prestige personalities'<sup>5</sup> (König, 1973), i.e. top designers and celebrities, continue to be the major leaders of fashion (see for example Table 6a, p. 193, and Table 6b, p. 194).<sup>6</sup> This suggests that the work of elite designers still serves as a yardstick for fashionability against which interviewees assess their companies' and their customers' level of fashion forwardness. Thus, if fashion is defined as the trends set by top designers the degree of fashion forwardness is measured in terms of how quickly and to what extent retailers and consumers follow the trends set by top designers and other fashion leaders. It is interesting to note that even interviewees whose companies do not follow the catwalk trends nonetheless use them as points of reference for assessing their companies' fashion forwardness.<sup>7</sup> Rita, for example, a fabric buyer for a design-led retailer, argues that her company is not very fashion forward because 'catching those trends ... isn't important to us or our customer'.

Overall, the data suggest that there are differences in the level of fashion forwardness between design-, buying/design- and buying-led retailers. We can see that, for instance, following catwalk trends is less of a priority amongst the seven design-led companies in the sample, while the remaining companies attach far greater importance to it. However, there are some exceptions amongst the design-led retailers situated at the lower end of the age range of this retailer category (see Table 5, pp. 160-1).<sup>8</sup> Tanya and Francis, who are working as merchandise controller/buyer and buyer respectively, for example maintain that it is important for their companies to be perceived as being 'on the ball' (Francis) or, although they do not regard themselves as 'innovators of fashion ... being very quick to follow' (Tanya). Tanya's and Francis' statements contrast markedly with those of other design-led interviewees. Sophia and Anne, specifically point out that being too fashion forward can have adverse effects for companies.

*Sophia:* ... we have made a few mistakes on fashionability, where we thought as a label we could go fashionable and it hasn't worked ... the brand is too established ... on that nice level that the fashionable person doesn't want.

*(Designer, design-led retailer)*

*Anne:* I think the biggest thing that's happened recently in the British retail scene, fashion scene is ... the demise of Marks & Spencer ... I think that is very interesting and it's completely about taking your eye off the ball, it's about trying to become more fashionable, it's about trying to appeal to a younger fashion end ... they have totally alienated their core customer who has now disappeared, they have not attracted the customer they wanted, because they are utterly inexperienced ... they are just not 'wantable' anymore, the things they have aren't wantable, whereas they did dress, you know, so much, so much of the nation – they don't now!

*(Fashion director, design-led group of retailers)*

Based on these two statements it could be maintained that following the latest fashions is of no great importance to the majority of design-led companies in the sample, in turn supporting Craik's (1994) claim that fashion has lost some of its former authority and omnipresence. However, an examination of buying/design-led and buying-led companies makes it clear that the influence of top designers has by no means diminished within these groups of retailers. Alicia and Lisa, who are both working for the most fashion-forward company in the entire sample and, arguably, the whole of the UK-based womenswear retailers, emphasise the influence of top designers on their company's products:

*Alicia:* ... a lot of people see us as quite high fashion ... [as having] it in the shop not much after the catwalks have been on.

*(Buyer, buying/design-led retailer)*

*Lisa:* ... quite often we've seen things on the catwalks and we've had them in like the next three weeks. Our quickest lead-time is two weeks ...

*(Assistant Buyer, buying/design-led retailer)*

Although buying/design- and buying-led companies are more fashion forward than design-led ones, there are nonetheless variations between companies. Using Alicia's and Lisa's company as a yardstick for high street fashionability Kate, a designer/trend co-ordinator, states that her (buying-led) company aims to launch its product no more than four weeks after a trend has first appeared on the high street; whereas Faye, who employs the same comparison, maintains that her company lags approximately six weeks behind Alicia's and Lisa's. Despite this time lag, the impact of top designers on Faye's company is nonetheless significant:

*Faye:* ... we spend a lot of time looking at Versace and Gucci ... when the catwalks head down ... those are the kind of looks that we take our inspiration from ... most of the work we do is based ... straight off the catwalks ... we're so close to the season it's totally catwalk driven.

*(Design Manager, buying/design-led retailer)*

Similarly, though not a manufacturer of high-fashion clothing, Clara maintains that her company has very successfully used certain elements from top designers within their own clothing ranges:

*Carla:* ... [catwalk fashion] is hard to decipher or take down to our level [...] [but] Stella McCartney ... whatever she does, I mean horses and things like that, we are still doing versions of horses now and fruit ... she did that pineapple thing and look what we are doing: strawberries, cherries, pineapples, bananas.

*(Designer, buying-led manufacturer)*

Retailers' degree of fashion forwardness not only influences when, or indeed whether or not, a company follows the fashion lead set by 'prestige personalities', but also has an impact on (1) the split of retailers' ranges, and (2) the in-shop lives of their garments. The companies in the sample break down the fashion cycle of garments into three different stages. This is illustrated in the following quote by Vivian:

*Vivian:* If you look at the life cycle of it [fashion] ... you can break [it] into ... trend, ... newness ... [or] contemporary and then you've got kind of core, which is just like high volume stuff, M&S is sort of core with a little bit of newness/contemporary.

*(Design Executive, buying/design-led manufacturer)*

Following Vivian's definition 'trend' refers to garments with a high fashion content, while garments of a moderate level of fashionability are described as 'newness' or 'contemporary'. Clothes of a minimal or no degree of fashionability are characterised as 'core' garments. This category of clothing is also often called 'basic' or 'standardised'. Not all companies use the same terminology to describe these different degrees of fashionability. In Sophia's company, for example, garments are divided into special (fashion), interest (newness) and basic (core).

*Sophia:* We do our basic range, we do our range that has a bit more interest, so you put a little bit more newness in and then we do what is our proposal for special, the special end.

*(Designer, design-led retailer)*

Despite these differences in labelling, Sophia's and Vivian's division of garments and garment ranges according to their level of fashionability is remarkably similar. Looking at the overall distribution between fashion, contemporary and core garments, it becomes clear that the extent of companies' fashion forwardness determines the mix of their product range. However, whilst all companies in the

sample grade their ranges similarly and interviewees share the same points of reference in terms of assessing their companies' fashion level, when looking at the garments in store it becomes clear that what is rated as fashion within one company's range may merely be classified as newness in another's. The overall degree of a company's fashionability, as opposed to outside standards of fashion, appears to act as the point of reference in the internal grading of garments and clothing ranges. This means, for example, that a company with a moderate degree of fashionability may classify a garment as 'fashion' even if it captures a trend that has first appeared on the catwalks more than a year ago. On the other hand, a more fashion forward company may label a garment as 'core' which less ardent followers as fashion may perceive as 'newness'.

Despite these differences in the classification of garments' level of fashion forwardness, the actual split of the garment ranges into fashion, newness and core is not so different between the retailers. Alicia/Lisa's buying/design-led company, for example, splits its product range into about 50 percent fashion and 50 percent core garments, whereas Tanya's design-led company is not as 'cutting edge' and therefore only allocates 20–30 percent of the range to fashion. However, Tanya's company carries a smaller percentage of core lines than Alicia/Lisa's company, namely 20 percent compared to 50 percent, while the remaining 50–60 percent of Tanya's range consists of contemporary lines. Kim's and Zoë/May's buying-led companies have a ratio of 60 percent and 80 percent of core garments, respectively.

In addition, not only fashion forwardness but also retailers' market position must be taken into account when assessing the split of garment ranges. In comparison to Tanya's company, which carries the most expensive range of garments of all retailers in the sample, Alicia/Lisa's company is located at the mid to cheaper end of the market. This might seem to suggest that not many of Tanya's customers would be willing to spend a large amount of money on high-fashion garments with a relatively short lifespan, whereas Alicia/Lisa's company's fashion forwardness and comparatively low prices cultivate a 'throw-away' approach to clothing which complements the highly fashionable nature of some of this company's products. This interpretation of the interrelationship between garment price and fashion content of a range seems to be contradicted by the fact that Kim's and Zoë/May's buying-led companies, which are at the cheap end of the market, only allocate between 40 percent and 20 percent, respectively, of their range to fashion. This might be related to the fact that these companies cater for the 'customer on a budget'; as Zoë points out they 'need to show the customer that they can buy three vests for £9 ... two shirts for £15'. It can be extrapolated that catering for the cheap end of the market makes it

essential for companies to offer garments that will ‘last’ – at least from a fashion point of view. Producing garments for the cheaper end of the market limits companies’ ability to follow all the latest trends since the purchase of costly fabrics and trimmings, which might be needed to give clothes a fashionable edge, may over-extend their budgets.

As we have seen, the grading of garments according to their fashionability is common to all retailers in the sample and is used not only to determine the mix of the product range, but also the length of garments’ shelf life. Shelf life refers to the duration of time a garment is kept on display in store. The length of garments’ shelf life is determined at the time of ordering the clothes from the manufacturer. In reply to a question about the average shelf life of her company’s clothes, Lisa makes a clear distinction between fashion and non-fashion garments by pointing out that the ‘obviousness’ of a garment determines the length of its run. This observation is echoed by Sean whose company is also buying/design-led, but not as fashion forward as Lisa’s:

*Lisa: I couldn’t give you an average. It goes from a week to a month, to 6 months ... it just completely depends. It depends how obvious it is ...  
(Assistant Buyer, buying/design-led retailer)*

*Sean: ... an average line 7, 8 weeks, but we do have exceptions, you know, core lines which could sell for a year, 2 years. ... [but on an] average line it’s ... maybe 7 or 8 weeks, you know, because then everyone who wants to buy that one will pretty much have got it.  
(Assistant Merchandiser, buying/design-led retailer)*

The way in which fashion forwardness influences the shelf lives of garments becomes all the more clear when looking at the garment run-times experienced by Leah’s (design-led) company:

*Leah: ... we, as a business, have learned that we have a lot more shelf life in a product. We can run something and it will continue selling for a year or a year and a half. We don’t have to change all the collection a hundred percent all the time constantly. We can make it evolve. And it’s not ... it’s not as overtly seasonal either ...  
(Buyer Director, design-led retailer)*

Given that the grading of garments according to their fashionability is a common practice amongst all three categories of retailers in the sample, one can assume that the degree of fashion-forwardness and the mix of the product range determine the in-shop lives of garments. What these quotes illustrate once again is that there is a marked difference between fashion and core/standardised clothes not

only at the manufacturing level, but also at the retailing and consumption levels. While the lifespan of individual items of clothing has undoubtedly been decreasing throughout the (more recent) history of ready-to-wear clothes, the often-cited speeding up of the fashion cycle has not touched all levels of garments. Not only do basic/core items still have long run-times, but certain well-established pieces of clothing or styles are continuously repeated with only small updates within all three categories of retailers:

*Sarah:* We have got garments that, no matter what we do season after season, they'll sell ... certain elements of the range sell every season without fail and it's just a rehash of what we've done the previous season.  
(*Designer, design-led retailer*)

*Sean:* ... black trousers ... will always sell. We will always sell X amount of trousers every week, but you might have to change the detail on it a tiny bit ... you've got to give it a slight move or a slight twist, but essentially ... there is this continuous demand ...  
(*Assistant Merchandiser, buying/design-led retailer*)

*May:* ... we have [a] ... formal customer who comes in to buy our suiting and that is just year in, year out ... half the range is the same ...  
(*Designer, buying-led retailer*)

Although some garments have long run-times and are hardly changed from season to season, there is also a strong tendency throughout fashion retailing to entice customers with new stock on a regular basis – a practice that reinforces retailers' image of being 'cutting edge' (or at least 'up-to-date') in addition to supporting claims of the speeding-up of fashion. It is thus in keeping with the high fashion image of Alicia/Lisa's company that stock changes occur every 3 weeks. However, it is important to point out that the term 'stock changes' does neither imply a complete change of a store's content; nor can the length of garments' in-shop lives be measured by the frequency of stock changes. For instance, although Eric/Tom's company has fortnightly changes of stock, their average garment shelf life lies between 6–8 weeks for contemporary lines and up to 27 weeks (one season) for core garments. From the example of stock changes in Eric/Tim's company, we can see that it is not only fashion forward retailers who appreciate the need to entice customers with new garments. This observation is strengthened by the following quotes taken from interviews with Carla, Kate and Francis:

*Carla:* ... they [Kate's company] are aiming now to get the store looking different every week. So the customer is continually pulled back into the shop ...  
(*Designer, buying-led manufacturer*)

*Kate*: ... it's a case of trying to come out with new things all the time ... or that appear new. So that consumers will keep spending, that keeps the whole system working ...

*(Designer/trend co-ordinator, buying-led retailer)*

*Francis*: ... I think to maintain the customers' interest you need to have an influx of cheaper fashion items throughout the season ...

*(Buyer, design-led retailer)*

Even those companies that do not follow fashion trends, as such, engage in frequent stock changes; Eric/Tim's design-led company, for example, updates its stock and window display on a fortnightly basis. Similarly, Rita/Sarah's and Tanya's design-led companies update their collections throughout the season to create a feeling of 'newness', if not high fashionability, within their ranges.<sup>9</sup>

Also of significance when comparing companies' levels of fashionability are the differences in their 'seasonal lead-times'. Seasonal lead-times refer to the amount of time taken up between the initial forecasting of trends and the arrival of garments in the shops. The data show that seasonal lead-times vary significantly between design-led retailers and buying/design-led and buying-led retailers. On average, the design-led retailers in the sample start planning their ranges just over one year ahead of the season – companies with a wholesale division have to start even earlier.<sup>10</sup> Thus, Rita/Sarah's and Francis's design-led companies start buying the ranges one year ahead of season, which means that the initial forecasting and design stages are even further in advance. Similarly Jane, who designs for an independent buying/design-led label, has to work well over a year ahead since she has to present ranges to retail buyers approximately 6 months before the garment delivery time. Thus, on these 'forward-ranges', Jane starts placing fabric orders about 14 months ahead of garment delivery dates; this means she will have to start the forecasting and design process at least 16 months ahead of season. Her company also sells 'in-season' ranges, which have much shorter lead-times and are used to update the ranges to give them more of a fashion edge. For the in-season ranges, Jane's company's working schedule is well within the average for buying/design-led companies – from 6 months to 3 weeks – whereas the lead-times for buying-led retailers range from 5 months to 4 weeks.<sup>11</sup> The differences between design- and buying-led companies' lead-times and the connection between lead-time and retailer's degree of fashionability can be clearly seen in the following two quotes:

*Rita*: ... we are kind of working, a year to 2 years ahead. But for us, because we aren't an overly fashionable company, ... we can work that far in advance, you know, it's not like we are picking up what's in stores, what the

designers are showing, although our colours ... we use colour palettes that are presented as being on trend for those seasons, the fabrications and styling isn't going to be, you know, fashion led as such. So ... yes we do work very much in advance ...

*(Fabric Buyer, design-led retailer)*

*Kate:* ... the high street, very young high street fashion work very close to the season. So we don't plan so far ahead ... we see things and 4 weeks later they will be in the shop ...

*(Designer/trend co-ordinator, buying-led retailer)*

These examples clearly show the connection between a company's level of fashionability and their working practices. Thus, Rita argues that her design-led company does not follow fashion other than in terms of colour and that they can consequently work much further ahead of season than, for instance, Kate's company which targets a younger, more fashion forward market.

There are also drastic variations in lead-times between different departments and product types. This explains the great variation in lead-times from months to weeks found within buying/design- and buying-led retailers. Alicia explains this as follows:

*Alicia:* ... different departments have different lead-times. Generally we start, sort of about 6 months before ... just looking at where we think it's going. But my department [jersey] itself can turn stuff round in 4 to 5 weeks.<sup>12</sup> So we can work very quickly, like I am now just booking end of August<sup>13</sup>, but knitwear, for example, have already booked the whole season so ... the design teams run on two kinds of speed, one for us which is really quick and now and the other one where they sort of look quite far in advance.

*(Buyer, buying/design-led retailer)*

Knitwear and tailoring are generally placed the furthest in advance not only because production costs of these more complex garments can be kept lower by using offshore instead of local suppliers, but also because these product areas are associated with formal/occasion wear which are less likely to be subject to quick fashion changes. In contrast, jersey garments, such as t-shirts, can be produced locally, quickly and cheaply, making them the product type with the shortest lead-times. Consequently, this product is often used to 'give the fashion point of view to the story' (Faye):

*Sean:* ... a knitted fabric takes a lot longer, cause it's got to come from the Far East ... But something like a jersey top we can turn around in 4 weeks. If you have a jersey wear top that went out and did brilliantly, within 3 and a half weeks you could have a repeat of that on the shop floor ... it totally

depends on the product type. Tailoring and knitwear are very slow. That's where you've got to ... plan a little bit more in advance and make your decisions, then stick by them ...

*(Assistant Merchandiser, buying/design-led retailer)*

Sean's quote indicates that t-shirts can be turned round in a matter of weeks, while tailored garments will take much longer; not surprisingly, therefore, the more complex the designs, the longer the garment lead-times. This is reflected in the longer garment lead-times for design-led retailers who often make greater use of embroidery or other forms of embellishments, apply more sophisticated cuts and finishings, or use fabrics that are less readily available. It follows that through these practices design-led retailers' lead-times are not only much longer than those of buying/design-led and buying-led retailers, but it is also more difficult for them to repeat garments from within their own range and to react to emerging trends, as Tanya and Tim point out.

*Susanne:* Can you repeat garments that sell really well?

*Tanya:* It depends. Obviously when we place fabric, if there is something we feel very strongly and we think 'I know this is going to be really good', we place additional fabric and therefore if that's in place the sort of turn around for manufacture is 6 to 8 weeks ... However, if we haven't got the fabric, that does prove harder for us because we then have to go back to the mills and see if they've got anything left to be made up. So it's really only on styles that we have cloth available.

*(UK Merchandise Controller/Buyer, design-led retailer)*

*Tim:* We can't do a great deal of it [repeat orders], because a lot of our goods are actually quite heavily hand worked and so the lead-times are too long basically. That's why our range tends to be quite broad, we don't actually do a great deal quantity-wise per style, but we make it up by putting more in, by more frequently changing things.

*(Buying Director, design-led retailer)*

As we have seen, companies grade garments into fashion, contemporary and core depending on their level of fashionability. Based on these differences between garments one would expect to discover significant differences in the lead-times between core and fashion garments. Indeed, the data suggest that even fashion-forward retailers place their core garments well ahead of the season in order to get the lowest production prices from manufacturers. Offshore manufacturers are used not only for knitwear and tailoring, but also for the production of relatively simple, high-volume lines, whose low fashion sensitivity means that the risk associated with working far ahead of the season is relatively low. These differences in the working practices of high street retailers in terms of garments' fashion content echoes some of

the observations made in Chapter 3 regarding the existence of different fashion systems, and the varying relationships between fashion level and the labour and production systems in the fashion trade.

We have thus established that there are some variations between design-, buying/design- and buying-led companies in terms of their overall level of fashionability and that this has consequences for their working practices. The next section examines the relationship between a company's fashion level and their target customer group and asks whether there are marked differences between the retailer groups and the customers they cater for.

### **5.3 Fashion Level And Target Customer Group**

As we have seen in section 4.9 in Chapter 4, there exists a correlation between companies' target customer groups and their market positions, which has been explained by looking at the average amount women of different age groups spend on clothing per week. This customer-spending structure is clearly reflected in interviewees' quotes. As shown earlier, Zoë's buying-led company caters for low-income customers or women who do not want to spend a lot of money on their outfits, while respondents working for design-led companies emphasise the fact that their customers have a high disposable income.

*Sarah: ... the core customer is 55 ... and really, because our clothes are quite expensive that lady is the lady who has, you know, income to spend. Her mortgage is paid, her children are off her hands, her husband is in the last few years of working and what have you. You know, they've got quite a lot of money to spend ...*

*(Designer, design-led retailer)*

*Tanya: ... [our customer] is probably ... 30+. Somebody who is professional, who's got a high disposable income. Who appreciates ... quality garments ... she is fashion aware but she is not ... a fashion 'victim'.*

*(UK Merchandise Controller/Buyer, design-led retailer)*

Connections can be drawn once again to Bourdieu's (1994) discussion of the interrelationship between economic and cultural capital. Appreciation presupposes one's ability to decipher the (cultural) qualities inherent in goods and artefacts.

Consumption is a stage in the process of communication ... an act of deciphering, decoding, which presupposes practical or explicit mastery of the code ... a work of art has meaning and interest only for someone who possesses the cultural competence, that is, the code, into which it is encoded. (Bourdieu, 1994: 445)

Therefore, only those who are culturally competent can understand the 'goodness' or inherent value of high-quality clothing. This is particularly clear in Tanya's characterisation of her company's customer whom she describes as being well-off, i.e. possessing high economic capital, and someone who 'appreciates' quality clothing. While one gets a sense that the customers in Sarah's description consume expensive clothing simply because their financial situation allows them to, the connection between economic and cultural capital is far clearer in Tanya's interview.

Age influences the spending power of prospective customers as well as their buying patterns. Mintel (2000: 17), for instance, reports that 15–24-year-olds are the most fashion-oriented buyers with the shortest clothing 'replacement cycle'. The data clearly support this observation. Kate, whose buying-led company caters for the 18–25-year-old, explains younger women's buying behaviour as follows:

*Kate: ... we have to have new things in all the time to excite the customer, 'cause young girls ... they want something to wear on the Saturday night ... they might have £20 from their part-time job ... [they] can't go out wearing the very same thing that ... [they] wore last week ...*

*(Designer/Trend Co-ordinator, buying-led retailer)*

The correlation between age, fashion forwardness and customers' buying patterns becomes even clearer in the statements of Faye, Anne and Leah. Faye describes her company as lagging behind the most fashion-forward retailer in the sample (and on the high street) by approximately 6 weeks. She maintains that the reason for this is not related to her company's inability to react to trends as quickly as other retailers, but rather to the fact that her company's target customer is not a fashion leader. Describing her target customer, Faye states that:

*Faye: ... she is not somebody who's got the confidence to be the first person to be wearing whatever the trend is. We know that she will want to see it in the magazines first, she'll want to have seen her friends wearing it ... She is not ... a Top Shop customer, completely out there wearing the latest gimmick first.*

*(Design Manager, buying/design-led retailer)*

This shows that, although Faye's target customers are not cutting edge fashion leaders, they are still happy to follow trends, albeit at a short distance. However, comparing Kate and Faye's statements, with Rita's earlier comment that 'catching trends' was neither of importance their customers nor the company suggests that, on average, women's clothes buying patterns change once they get older. This also becomes apparent when looking at Anne and Leah's observations,

which point to a number of reasons for this change. Anne, for instance, argues that older women are more conservative buyers in that they have found their personal style and consequently tend to change their style of clothing less frequently and less dramatically than younger customers:

*Anne:* ... generally women don't want to suddenly become something different every 6 months, you know. What you'll find is that a lot of a woman's style is set quite early and it's just tweaked as she goes through her life. [...] In this sort of business ... you are aiming at a different sector of the market, at more considered buyers. They are not rushing out every Saturday thinking 'I must have something new for tonight!' So it's very very different [...] You know, a lot of our market is the woman who knows herself, who says 'I love wearing this and when it's worn out I want to buy another one ...' See, there is a lot of replacement business ...

*(Fashion Director of Group, design-led retailers)*

Similarly, Leah maintains that her customers have developed their own style preferences and show no interest in following fashion trends as such. Instead, they are more concerned with what she refers to as 'wardrobe building', i.e. buying good-quality clothing they can wear for more than just one season and that can be combined with other garments to create new looks.

*Leah:* ... [our] customers aren't fashion leaders. We are not cutting-edge high fashion, we are more ... all those pieces that everybody wants in their wardrobe all the time, but that have an edge or show that you know what's going on. It might be that it's taken a year for that trend to sort of come down and everybody is feeling a bit comfortable with it and familiar and they [customers] sort of know that it's fashion but it's not leading edge. And that's when we would do it and it works [...] our customer isn't like 'I want this look! And I want to walk out tonight, to a club, looking like this.' She is much more 'I am going to pay £85 for that pair of trousers in black because they are really good and I know they are going to last me.'

*(Buying Director, design-led retailer)*

In other words, both Anne and Leah maintain that older customers may be less inclined to follow the latest fashions because they regard clothing as an investment. These customers are not only able to spend more money on clothing, but prefer to buy better-quality garments for which they will pay a higher price – an observation once again reminiscent of Bourdieu's (1984) argument.

DeNora and Belcher (2000: 92) make a number of interesting comparisons between older and younger women's shopping behaviour. Like Anne, they argue that older women's sense of identity is derived from sources other than their appearance (for instance, their professional, family and social roles); in contrast, clothing may be

a more important factor in younger women's identity formation. While younger women 'try on' new self-images through clothing, older women – as Anne suggests – may be more secure and set in their self-image and less happy to experiment with new visual representations of self. Thus, social distinctiveness through clothing may be achieved differently in the two groups of shoppers. Older women may resort to expensive, high-quality clothing to express their social position, while for younger women 'being in fashion' may serve as a means of gaining social distinctiveness within their reference group. These differences in the use of clothing may help to explain different garment purchasing patterns of younger and older women: younger women may be more interested in frequent purchases of fairly inexpensive garments, while older customers may prefer to occasionally update their wardrobes with more expensive items. Indeed, Tseëlon (1994) points out that the

... fragmentation of society into smaller units of relevant frames of reference ... may also imply shorter and faster cycles of change of what a relevant reference group regards as the appropriate code. (Tseëlon, 1994: 129)

Differences in the shopping behaviour of younger and older women may also be explained in terms of what the actual 'act of shopping' means to different age groups. DeNora and Belcher (2000) observe that older women shop with a purpose in mind, i.e. they may buy clothes for work or a specific social occasion, while younger women 'are more likely to view shopping as a leisure time pursuit, [and are] more likely to visit a shop with no specific objective in mind' (DeNora and Belcher, 2000: 92).<sup>14</sup>

DeNora and Belcher's (2000) characterisation of older women's shopping preferences is shared by Anne and Leah who, as we have seen, perceive age as a factor that reverses the trend towards the 'throwaway fashion' (discussed in Chapter 3); this reinstates an attitude toward clothing comparable to that of other consumer durables. Seen in this light, it can be argued that, once again, quality and newness are ranked more highly on the older customer's preference list than cutting-edge fashion. By emphasising newness, rather than fashion, design-led retailers can update their clothing ranges as frequently as buying/design- and buying-led retailers. This supports the earlier claim that all retailers in the sample update their stock on a regular basis to entice customers back into the shops. From these observations, we can see that the fundamental difference between fashion forward and less fashion-sensitive retailers lies not in the frequency of stock changes, but rather in the way they handle updates. While fashion-sensitive retailers follow trends, albeit not all at

the same pace, less fashion-sensitive retailers try to tempt customers back into their stores by providing variations and updates of styles that work well for their target customer group. This can be seen in the following quotes:

*Sophia:* ... given that the company is in a sort of very safe middle-of-the-road bracket, I tend to look at what is new for her [the customer] and what would be something different. So maybe it's like her favourite t-shirt with a special neckline or a very comfortable dress but in a slightly different print. So it's something that's slightly different, without changing the whole form. You're just, just tweaking things ... keep it in the formula that works ... the latest thing that's fashionable, but for our customer.

*(Designer, design-led retailer)*

*Tim:* We ... as a company have to progress in what we are putting forward and we have this customer base who are our ... our life basically. And we have to make sure that, as we move the range on, we have to make sure that our customers are moving with us and that is something that is very, very important ...

*(Buying Director, design-led retailer)*

Another reason why more mature customers may be less ardent followers of fashion than younger women may be because fashion itself is biased towards the young, slim body; new trends may not always be suitable for an older customer or for women whose body measurements are at odds with the standards of the time. Kate, for instance, comments that, when she is looking at styles for her company's 'plus-size' branch of the business, which covers sizes 16–24, she has to keep in mind that 'customers can wear a bra under that ... that gives them a bit of support' or that this group of women may prefer long over short skirts regardless of whether or not they are currently on trend. She makes it clear that fashion often has to take second place when catering for this customer group. Similarly Sarah, who describes her core customer as being '55 years old ... 5 ft 5 inches ... and ... a good size 16', shows that following fashion is difficult for retailers catering for an older market – a sentiment echoed by Tim who, although catering for slightly younger customers than Sarah, also maintains that many trends are not suitable for his target customer.

*Sarah:* ... there's a lot of things that we can't touch from a trend point of view ... you know cropped mid-riffs ... sometimes you get ... forecasting books for styling ... you can turn each page and there is not one garment you could actually use out of the book.

*(Designer, design-led retailer)*

*Tim:* ... there are certain looks which are going to be ... prevalent on the high street and it's a matter of actually deciding whether those looks are something which we could interpret, that would actually suit our customer

because ... there are lots of different looks that ... would be appropriate maybe for a 17-year-old girl, but not for our market.  
(*Buying Director, design-led retailer*)

One element of fashion that poses the least restrictions in terms of age and/or size is colour. Colour can theoretically be worn by any kind of person. While not all garment styles may be suitable for all customer types, colour does not make this kind of distinction between groups of people, i.e. different sized garments can all be made up in the same colour. As a consequence, it is easier in some market segments to give garments a fashion sense through colour than it is to achieve fashionability through style. Colour is also quite often the only component of clothing that provides something new for those who show no inclination to follow other fashion trends.

*Vivian*: ... you can have a customer ... who is not interested in fashion ... they are very much a core type customer, replacement purchases. Not really interested in what's going on in fashion. The only influence that might come through to them might just be colour.

(*Design Executive, buying/design-led manufacturer*)

Since the way a garment is cut determines how much and which parts of our body are revealed and/or emphasised it is plausible that customers feel more strongly about the differences in how their body is presented through various garment styles, than in which colour these styles are executed. Our preferences in how we display our body through clothing may thus be so strong that a customer who does not like wearing low cut, midriff-free tops, for example, will not choose to buy them no matter how nice their colour or fabric. Based on the fact that it is the style of a garment and not its colour which primarily determines one's bodily display, customers may attach greater significance to the styling than the colour of clothing: as long as they can buy a certain type of garment style, the colour takes second place. Thus, faced with the choice between buying an 'old style in a new colour' or a 'new style in an old colour', the costumers in Vivian's quote above may prefer the comforts of the familiar style over that of the familiar colour. In fact, the differences in colour are often so subtle that the untrained eye may not perceive a new colour as being the new fashion colour of the season.<sup>15</sup>

However, as Tim's statement indicates, no matter whether retailers cater for old or young customers, those who are fashion forward or not, they always have to 'translate' trends, styles, colours and materials to fit their target customer group. The data show that this is practised by all retailers in the sample. Even the most fashion-forward retailers cannot take trends straight from the catwalks into the shops; this is not just because of the high costs involved (in terms of materials and production) but

also because these fashions are often ‘unwearable’ in a day-to-day context. Not surprisingly, therefore, there is ample evidence that retailers choose trends, or some specific elements of them, and transform them into a style that is suitable for their target customers. Carla’s earlier comment shows that it is sometimes difficult to ‘decipher’ designer fashion and to bring it down to the retailer’s own level. The extracts below, taken from interviewees of all three retailer categories, highlight similar problems and demonstrate the importance of adapting fashion to one’s market.

*Leah:* ... [we have to] get the trends and rank them to fit what we think [our company] is all about and who the customer is ...

*(Buying Director, design-led retailer)*

*Sean:* We don’t chase every trend. We can’t, because not very trend will be right for our girl. If it isn’t right for [our] girl, you won’t be seeing the trend regardless of how ... wonderful people may think it is ... if it is working on the catwalk it doesn’t necessarily mean it’ll translate into ... what our girl would ... wear or buy.

*(Assistant Merchandiser, buying/design-led retailer)*

*May:* ... [we have to assess how] commercial they [trends] are. ‘Cause that is another thing ... a lot of the ... catwalk [fashions] ... are not right for our customer. We have to sort of translate it. Obviously we know our customer, she is very feminine, so the harder edge stuff is not really [her] ...

*(Designer, buying-led retailer)*

This section has shown that retailers’ level of fashion forwardness corresponds to that of their target customer group and that retailers take their customers’ age, spending power, buying patterns and fashion consciousness into account when creating their garment ranges. Given these different parameters, one would expect to find a great variety of finely nuanced garments on the high street. The reality, however – as a stroll through the major high street retailers clearly demonstrates – is far from this expectation. Consequently, before discussing retailer groups’ differentiation strategies, we will take a closer look at the reasons behind the sameness of the high street retailers.

#### **5.4 It’s Difficult To Be Different: The Quest For New Ideas From Similar Sources Of Inspiration**

The starting point for any investigation into the root cause of the sameness of high street retailers is their quest for new ideas and inspirations for their forthcoming range of clothing. The actual procedure of fashion forecasting is discussed in Chapter

6 but this section examines the sources of inspiration used by the companies in the sample. The main clusters of stimuli that influence the companies to varying degrees have been identified from the data.<sup>16</sup> The breakdown of the sources of inspiration for design-led companies can be seen in Table 6a, while Table 6b reflects buying/design- and buying-led companies' inspirational influences.

**Table 6a Design-led Retailers' Sources Of Inspiration**

Name	Cat-walk shows	Forecasting agencies	Fabric & trade shows	Buying trips	UK retailers	Celebrities & media	Street fashion or other
Tanya <sup>a</sup>	Yes	Uncertain	Première Vision and others	N/A	None	N/A	N/A
Sarah/Rita	Yes <sup>b</sup>	Peclers <sup>c</sup>	Première Vision, Moda in Milan	NY, Milan, Düsseldorf Paris Far East	Comparative	N/A	N/A
Tim/(Eric)	Yes <sup>b</sup>	Jennings	Première Vision and others	Paris, NY	Comparative	N/A	N/A
Anne	Yes <sup>b</sup>	No	Première Vision and all other shows	N/A	Comparative	N/A	N/A
Sophia	Yes <sup>b</sup>	Freelance consultant	Première Vision and others	N/A	Comparative	N/A	Markets
Leah	Yes <sup>b</sup>	No	Première Vision, Petit Filati, Moda in Milan	Florence	Comparative	N/A	N/A
Francis	Yes	WGSN	Première Vision and others	N/A	Comparative	N/A	Street fashion & vintage shops

a: Tanya is not involved in the forecasting process, which is done by the company's design team in New York. For this reason Tanya is uncertain whether her company subscribes to any forecasting agencies, although she does mention that the designers 'pick a lot up from websites and Vogue Trends', which could indicate that the company uses a web-based forecasting service such as WGSN. However, she is certain that the design team of her company attend catwalk shows - which makes Tanya's company the only one in the sample which actually goes to catwalk shows - all other respondents get their trend information from internet forecasting services, such as WGSN, or magazines, such as Collezioni.

b: Although respondents were aware of what was happening on the catwalks, the influence of top designers in their companies is relatively low.

c: This service provides only colour information.

**Table 6b Buying/design- and Buying-led Companies' Sources of Inspiration**

Name	Cat-walk shows	Forecasting agencies	Fabric & trade shows	Buying trips	UK retailers	Celebrities & media	Street fashion or other
Vivian	Yes	WGSN	Première Vision	NY and other buying trips	Comparative & Directional	N/A	N/A
Jane	Yes	WGSN	Première Vision, 40 Degrees, Elite Show	N/A	Comparative & Directional (brands)	N/A	N/A
Faye	Yes	WGSN, Trend Union, Peclers, Trendwise, Fashion Service, freelance forecaster	Première Vision, and others	NY, Paris, Italy	Comparative & Directional	N/A	N/A
Alicia/Lisa	Yes	Freelance consultant	Première Vision, 40 Degrees and others	NY, LA, SF, Italy, Amsterdam Tokyo, Reykjavik	Comparative & Directional	Yes	Markets vintage shops, boutiques street fashion
Kate	Yes	WGSN	Première Vision, 40 Degrees and others	Rely on suppliers' buying trips	Comparative & Directional	Yes	Street fashion
Kim	Yes	No	Première Vision, 40 Degrees and others	Unspecified buying trips	Comparative & Directional (retailers & brands)	Yes	Street fashion
Carla	Yes	WGSN	Première Vision, and others	LA, Rome, Paris	Comparative & Directional	Yes	N/A
Zoë/May	Yes	WGSN <sup>d</sup> & one other	Première Vision, and 3-4 others	Europe, America	Comparative & Directional	Yes	N/A

d: At the time of the interview Zoë and May were negotiating a subscription to this service.

The sources of inspiration listed in Tables 6a and 6b refer to interviewees' personal sources of inspiration as well as their assumptions about what influences

their colleagues. This is particularly the case for those respondents who are not directly involved in the forecasting process – for instance, some of the buyers and all of the merchandisers. Forecasting and the initial sourcing of new ideas, for example, are primarily done by the designers (as shown in Chapter 6). Therefore, the three merchandisers (Tanya, Sean and Eric) could only provide limited information on this stage within the decision-making process. While Tanya could provide some information, Sean and Eric could not provide sufficient details to warrant their inclusion in the Table. This means that there is no information on Sean's company although he comments that the designers in his company go to Paris and Milan, perhaps for buying trips or to visit trade shows; information on Eric's company was gained through his colleague, Tim.

#### **5.4.1 Fashion forecasting agencies**

In addition to the previously mentioned influence of top designers on high street retailers, trend predictions from fashion forecasting agencies are another important source of inspiration for most retailers and manufacturers. Fashion forecasting refers to the prognosis of colours, fabrics and styles for the forthcoming seasons. Most forecasting agencies work at least 2 years ahead of the season and produce bi-annual prediction books which include colour palettes and illustrations depicting silhouettes, fabric styles and prints.<sup>17</sup> For obvious reasons, the further in advance forecasters work, the more vague their predictions. Not surprisingly, therefore, Kate questions the usefulness and accuracy of these forecasting services:

Sometimes trend predictions, they are beautiful books, gorgeous illustrations, but they are not always right. They are quite vague ... it's like 'Oh, you know, a heathery highland feel is around' ...  
*(Designer/Trend Co-ordinator, buying-led retailer)*

The relatively elusive quality of traditional forecasting companies' predictions and their occasional lapses in accuracy, in addition to the fact that their predictions are bi-annual, mean that they cannot immediately react to changing trends or the emergence of new influences. The shortcomings of traditional forecasting services is particularly emphasised by Zoë and May, whose company used to subscribe to three or four forecasting companies before being taken over by Anne's company. As can be seen in Table 6b, at the time of the interview Zoë and May only used one forecasting service but were hoping to subscribe soon to another, web-based, service. In fact, looking at the type of service most commonly mentioned by interviewees working for buying/design- and buying-led companies, it seems that the

future of forecasting lies with internet-based agencies, in particular Worth Global Style Network (WGSN), who update their site on a weekly basis. Indeed, of the eight companies in Table 6b, five were already using WGSN – the same forecasting service Zoë and May were hoping to subscribe to.

This stands in stark contrast to the information provided in Table 6a, which shows that only one of seven design-led retailers, namely Francis' company, has subscribed to this service. However, based on the aforementioned differences between design-led retailers on the one hand, and buying/design- and buying-led companies on the other it is not surprising to see some marked differences in the use of fashion forecasting services.

Tables 6a and 6b indicate that only 2 companies within the sample, namely Alicia/Lisa's buying/design-led retailer and Kim's buying-led company, do not subscribe to any forecasting agencies. In Alicia/Lisa's company for example, forecasting is primarily done in-house with the aid of freelancers who provide additional information on developments on the catwalks and other fashion shows. In Kim's company, on the other hand, budget restrictions prevent them from subscribing to forecasting services, although Kim maintains that she would like to use WGSN. This means that Kim's company is the only one of the buying/design- and buying-led firms that does not use any form of outside forecasting service.

Another exception among the buying/design- and buying-led companies, but for very different reasons, is Faye's company, which uses a total of seven different sources of trend/colour information. Compared to the average one or two forecasting services used by most other companies, this excess of Faye's company is truly remarkable. Faye explains this great variety of support services by arguing that her company is very colour driven – in fact she believes that much of its competitive strength lies in its approach to colour:

*Faye: ... we ... feel very strongly for colour. We tend to offer a lot more colour than the rest of the high street. We are much more optimistic in our colour palette so it's quite a fresh, visual effect to the range [...] so a lot of the time when we buy services we do use them for inspiration for themes and so forth, but we tend to use them more for colour, because we could use the catwalk shows as an inspiration for us [...] prediction companies used to be very important to us from the point of view of creating the themes and stories, but they are becoming increasingly irrelevant really ... we're so close to the season ... it is totally catwalk driven ... previously we used to ... start to do our themes one year in advance and they didn't really have any relevance ... to high fashion.*

*(Design Manager, buying/design-led retailer)*

Faye's description of her company's use of support services is very interesting because it shows that forecasting services are now predominantly used for colour predictions – completing a colour palette usually forms the first step within the creation of new clothing ranges – and for reflecting what is going on at the catwalk level, rather than style prognoses as such. Thus the most successful forecasting agencies today combine forecasting with trend analysis. This becomes clear when looking at WGSN's website. About 50 percent of the available information concerns trend predictions, which are done 18 months ahead of season. The remaining material is dedicated to the analysis of fabric/trend shows, global retail trends and catwalk shows. Indeed, WGSN prides itself on providing a comprehensive and immediate source of information on catwalk shows. According to its website, WGSN photographers shoot more than 11,000 pictures of prêt-à-porter womenswear shows each season, which they make available to their customers just a few hours after the event. In addition, they post photographs on their website and give a detailed analysis of the key trends (in terms of colours, fabrics and silhouettes) that can be used for 'commercial development' ([www.wgsn-edu.com](http://www.wgsn-edu.com)).

Given the potential opportunities for web-based forecasting services to make frequent updates to their site and the ease and cost efficiency with which a large number of graphic materials can be made available to their subscribers, one can understand why Faye maintains that for retailers who work so close to the season, traditional 'prediction companies and so forth are becoming more obsolete'. Faye's observation is closely echoed by Kate who, as pointed out earlier, takes issue with the vagueness of traditional forecasting services. Like Faye, Kate argues that because her company works so close to the season it is easier to use the more concrete information that can be obtained from following top designer shows. Kate contrasts her company's working practices with design-led companies and speculates that forecasting agencies are more useful for the latter because they work up to a year in advance. In fact, 'closeness to season' also helps to explain why Alicia/Lisa's company, the most fashion forward in the sample, refrains from using traditional prediction services: with their lead-times ranging from 6 months to a few weeks, they can easily react to most developments on the catwalks or elsewhere.

Given the relationship between seasonal lead-times and the use of fashion-forecasting services, one would expect Kate's assumptions that design-led companies use more prediction agencies than buying/design- and buying-led companies – who work closer to the season – to be accurate. However, the data show that this is not the case. First, there are two retailers within the design-led group – Anne's and Leah's companies – who refrain from using such support services. Leah explains this on the

ground that design-led companies are less fashion forward, while Anne argues that any good designer or buyer can do the job of a forecaster.

*Anne:* ... I don't believe that a detached body can really work for you and if you are a designer worth your salt and you are a buyer ... worth your salt, you should know! ... that's what instinct is all about and the people that work for fashion forecasting companies are no better than the people you have working as designers and buyers. ... [forecasters] don't have any special skills ... they are exposed to whatever your designers are exposed to and so we should be able to read the trends ourselves. We go to all the shows that are available ... so ... no I don't. I don't believe in it.

*(Fashion Director of Group, design-led retailers)*

*Leah:* We don't use fashion forecasters, we don't pay stacks of money to go and buy fashion forecasting books ... because we are not, we are fashionable but we are not leaders of fashion.

*(Buying Director, design-led retailer)*

Second, rather than employing a greater number of forecasting services as such, design-led companies are characterised by the variety of services used within the group – not one of the companies uses the same prediction service. This contrasts sharply with the other two groups who, with the exception of Faye's company, more or less draw on the same sources of inspiration.

#### **5.4.2 Fabric and trade shows**

While design-led retailers use a plethora of forecasting services, their trade show attendance is more focused. When asked about the usefulness of fabric shows, all interviewees in Tables 6a and 6b stated that they or their colleagues attend at least one show, namely *Première Vision*, which is held bi-annually, in February and September, in Paris. Founded in 1973, *Première Vision* ([www.premiervision.fr](http://www.premiervision.fr)) seeks 'to promote fabrics for the clothing industry' and helps fashion professionals 'to choose a colour for its strength, an idea for its meaning, and a fabric for its fibre'. *Première Vision* is the biggest and most influential trade show within the fashion world: it attracts weavers and fabric mills from all over the world and was visited by more than 50,000 fashion professionals in February 2003 ([www.premiervision.fr](http://www.premiervision.fr)). Fabric shows, such as *Moda* in Milan and *Première Vision*, are staged approximately one year ahead of the season. For example, the *Première Vision* show in September 2003 is aimed at the autumn/winter season 2004/5. Trade shows are thus important venues for retailers, manufacturers and freelance designers for getting up-to-date information on colours and fabrics, and they provide a good platform for extending manufacturers' networks of fabric suppliers.<sup>18</sup>

While fabric shows provide the starting point of the forecasting process for retailers who work fairly close to the season (e.g. Kate's and Zoë/May's companies), for design-led retailers, *Première Vision* 'is sort of at the end' of the forecasting cycle (Leah) since most retailers within this group obtain their initial sources of inspiration for fabrics and colours directly from mills which, of course, start developing new products well in advance of the first fabric shows. In view of the long lead-times of design-led companies, it is not surprising that they should take advantage of the earliest opportunity for seeing new products by visiting fabric mills. This gives them the opportunity of starting their forecasting and planning cycle at least 2 months ahead of *Première Vision* and other fabric shows.

*Sarah:* ... we tend to start the new season by going to Italy and we go to Milan and we'll do the shops. Then we'll go to Como, Lake Como where the majority of our print mills are based and this will be maybe two months before *Première Vision*, which is the fabric show in Paris, and at that stage they are all getting prepared for the PV shows, but they, being in that business have all the forecasting books and ... you know, there are ... the Italian Council for Silk and, you know, they've got a lot of information at their fingertips very, very early in the season. Whereas we would have, if we didn't go there, we would have to wait for our fabric forecasting books to come through and the shows, basically. But we tend to get all that information about 6 to 8 weeks before it's possible to get them from any other source really. And from that we tend, if we go around say 8 mills, we tend to know when we come back which are the predominant colours that everyone is going for.

*(Designer, design-led retailer)*

While the data suggest that the design-led retailers in the sample find fabric shows useful for finalising and consolidating their decisions, fabric shows may be less useful for buying/design- or buying-led companies or, at least, for certain departments within these two groups of companies. Alicia, for example, points out that for her jersey department fabric shows are only helpful in terms of colour selections, whereas 'other departments get lots out of it'. While she attends *Première Vision* regularly, the two representatives of manufacturers within the sample, Vivian and Carla, both maintain that their companies' attendance has become less frequent. Vivian explains this drop in interest by alluding to the difficulties of using new fabric suppliers. She maintains that the long-standing relationship between her company and its main customer, a large mid-market retailing chain, has facilitated the build-up of long-standing working relationships with suppliers who fit the retail customer's specifications. It is difficult to introduce a new supplier into the chain since this requires an intense investigation into the company's working practices and quality of

product. Even if Vivian were to see a new fabric that is 'quite directional' in one of the fabric shows, it would take a long time and considerable effort to get this new supplier approved. Carla highlights yet another reason why fabric shows may be of only limited use to some companies:

*Susanne:* Do you go to *Première Vision*?

*Carla:* We used to. We don't go so often now. I find it probably more beneficial to go shopping for samples, rather than shopping for cloths.

*Susanne:* Why is that?

*Carla:* ... when we go to *Première Vision*, there are so many different cloths on show that it is very hard to narrow down what would be the one to buy. Whereas, if we take a garment into a meeting [with buyers] that is already made ... I think ... the buyers have more confidence that it's already out there and on sale ... It is very difficult to try and sell another fabric if there's something really strong on trend ...

*(Designer, buying-led manufacturer)*

Carla's description of the difficulties in deciding which cloths are the best ones for her company to buy are reminiscent of Kate's observation regarding the vagueness of predictions from forecasting services. Although these comments suggest that there is a great variety of fabrics and colours to choose from, which may encourage manufacturers and retailers to seek greater diversity, they also demonstrate companies' unwillingness to take the risk of standing out. This fear of 'standing out with one's choice' seems symptomatic of the clothing industry overall. Thus, the organisers of *Première Vision* help and guide visitors in their buying decisions by providing them with so-called 'Bests' of each day. By consulting approximately 300 companies (40% of the exhibitors) on a daily basis, they compile information on which colours and fabrics have been most frequently bought that day. They argue that this information, which is displayed in written and audiovisual form for maximum impact, provides 'buyers... [with] a powerful tool ... one directly plugged into both the market and the realities of fashion trends' ([www.premiervision.fr](http://www.premiervision.fr)). This practice makes it easier for companies to identify the colours and fabrics others have chosen and hence promotes a feeling of confidence about their choice should they decide to go with the flow. However, while this practice promotes sameness, it can also be used by companies to consciously go against the grain and pick up colours and fabrics that lie outside the 'Bests'.

While fabric shows are all about colours and cloths, trade shows like 40 Degrees give visitors the chance to look at actual garments.<sup>19</sup> However, since most manufacturers of branded clothing show their new ranges about one year ahead of season they are less influential from a fashion-inspiration point of view than catwalk

shows, which are only 6 months ahead – i.e. shows held in September/October present the spring/summer collections of the following year.

### **5.4.3 Other UK retailers and buying trips**

Other sources of information and inspiration, especially for companies who feel that information gleaned from fabric shows is too vague and uncertain, are ‘buying samples’. Traditionally, the term ‘buying sample’ refers to manufacturer’s sample garments sent to retail buyers in order for them to make their selection. However, interviewees’ also used this term for garments they have bought either on buying trips abroad or from UK-based sources, e.g. other high street retailers, boutiques, vintage shops or markets.

Looking at columns 5 and 6 in Tables 6a and 6b, it is clear that there is some overlap in the destinations of buying trips; for instance, two respondents in Table 6a and five interviewees in Table 6b stated that their company travels to the US for inspiration. It seems highly likely that companies’ visits to fabric shows double up as buying trips. Thus one may expect more companies than the two listed in Table 6a and 6b to use Paris as inspiration. In fact, Carla points out that travelling to Europe and America has become so convenient and widespread that companies have to go further afield to get new and different ideas. She maintains that fashion-forward companies, such as H&M, no longer go to America, but seek their inspiration from Japan instead. Interestingly, Alicia, who works for the most fashion-forward company in the sample, appears to travel most extensively and to the most diverse set of destinations, including Tokyo.

While retailers use buying trips abroad for inspiration, column 6 in Tables 6a and 6b reveal that UK-based shopping trips have a different significance for retailers, depending on whether they are design-led or whether they fall into the buying/design- and buying-led categories. Companies can be divided into those which predominantly look at other retailers as directional sources of inspiration (see Table 6b) and who buy garments in order to rework or copy them, as compared with those companies whose main motive for looking at other retailers’ garments is for comparison (see Table 6a), i.e. to evaluate competitors’ garments on quality and price rather than on fashion. This is an important factor when it comes to assessing the variations in companies’ differentiation strategies; therefore it is discussed in that context later on in the chapter.

#### 5.4.4 Celebrities, the media, street fashion and other sources

The most obvious differences between design-led retailers and buying/design- and buying-led retailers can be seen in columns 7 and 8 in Tables 6a and 6b. None of the design-led retailers in Table 6a claims to be influenced by celebrities and only Francis maintains that street fashion is a source of inspiration for her company, while all but two of the companies within the buying/design- and buying-led group (Vivian's and Faye's companies) of Table 6b claim to be influenced either by celebrities, the media or street fashion. Indeed, three of the buying/design- and buying-led companies maintain that they are influenced by street fashion, celebrities and the media alike; interestingly, these three retailers cater for the youngest customer group, i.e. the 15-year-olds and the 18–25-year-olds. The following comments from Lisa's interview show just how much younger customers are influenced by celebrities and how this impacts on the retailers' which are catering for this customer group:

*Lisa:* ... last season ... everybody wanted anything that Geri [Halliwell] had worn ... that was what teenage girls wanted and we then had to develop a whole Geri kind of trend ... [or] Madonna wears a Union Jack t-shirt and that's all we can sell ...

*(Assistant Buyer, buying/design-led retailer)*

This is a recurring theme amongst most buying/design- and buying-led retailers: whatever the 'prestige personalities' within that customer group's cultural frame of reference are wearing will sell.<sup>20</sup> Perhaps this cross-fertilisation between inspirational sources can be viewed in terms of multi-layered and multi-directional 'circles of influence'. Successful singers, for instance, can act as inspirational sources for the fashion industry in that they can create a certain style of dress or elevate a specific garment into a seasonal 'must-have'. On the other hand, musicians also act as consumers of fashion. Their endorsement of a specific designer or high street retailer elevates the status of this fashion brand as can be seen in the following extract:

*Kate:* ... last season we had a ... t-shirt with 56 or something [written on it] and David Beckham went into [one of our shops in] Manchester and bought this top for Posh Spice. She was wearing it and she had a photograph taken in the newspaper; that t-shirt just boomed and we repeated it. It sold really, really well just because it had been seen in a national newspaper with Posh Spice wearing it. It was fantastic advertising. And then what we did is we got that picture and we blew it up and we put it in the shop next to the t-shirt. So everybody was seeing it and it sold. And that is what it's all about ... making your name quite cool.

*(Designer/trend co-ordinator, buying-led retailer)*

This indicates that the influence of prestige personalities on fashion is twofold: (i) as innovators and (ii) as high-status consumers who can heighten the desirability of a fashion brand and of a specific garment for ‘ordinary’ consumers of fashion. This role of prestige personalities as consumers of fashion is reminiscent of Hirsch’s (1972) and Crane’s (1992) discussion of the effect of media gate-keepers’ endorsement on the success of cultural products; in both cases, economic success is increased through this kind of approval. The backing of media gate-keepers or prestige personalities is not just of significance for cultural producers, but also confirms the claims that cultural selection is sequential and ongoing – selection processes do not simply stop once commodities have reached the market.

There are so many fast-changing influences from TV, music, film, etc. that retailers and manufacturers need to react quickly to catch the latest fads:

*Carla:* I think it started ... with the Spice Girls ... Geri Halliwell wore that Union Jack dress ... I think it was on a Tuesday, and by the Friday we were producing a dress very similar to that [...] we just did something for John Lewis which was ‘Waz Up’, you know, from the Budweiser advert ... That instantly ... If you don’t hit it the next day ... if you are not starting to organise the production of it the next day you’ve missed it. It’s so quick! [...] if it’s in the daily newspaper then you’ve got to be doing it and doing it quickly [...] it’s instant [...] everyday is just waiting for the next Britney top or ... to see what S Club 7 are wearing ...

*(Designer, buying-led manufacturer)*

The data presented in columns 7 and 8 of Tables 6a and 6b demonstrate that companies’ sources of inspiration with regards to street fashion, celebrities and the media differ significantly between design-led retailers on the one hand, and buying/design- and buying-led companies on the other. The data also (indirectly) hint at companies’ attitudes towards quick response. This important point of difference is highlighted at length in the discussion of buying/design- and buying-led retailers’ differentiation strategies in section 5.9 of this chapter.

With regard to other sources of inspiration, Tables 6a and 6b show that only two design-led retailers, and one buying/design-led firm, look at markets, vintage shops and/or boutiques. Alicia’s explanation as to why vintage shopping is such a good source of inspiration is interesting in that it once again highlights retailers’ tendency to rework garments to fit their own market, while at the same time avoiding the risk of being sued for copying:

*Alicia:* ... we did a big vintage shop which is really good, because then we can bring it back and we can do our versions of it and you don’t get into

trouble for it because it's old, it's vintage and nobody owns anything from it.

(Buyer, buying/design-led retailer)

In addition, using market or vintage shops as sources of inspiration means that retailers are more likely to achieve a unique look or style because they are drawing from a larger, more diverse pool of ideas. It is therefore not surprising that two design-led as well as the most innovative of the buying/design-led retailers, i.e. Alicia's company, should tap into these pools of ideas since some retailers, as we shall see, view uniqueness as a powerful tool for establishing their market niche.

## **5.5 The Diversity Of Customer Groups And Retailers' Sources Of Inspiration**

Having analysed the different sources of 'inspiration' used by the companies in the sample, it now seems appropriate to assess how diverse these sources really are. Although companies seem to use a great variety of sources from which they choose those elements most likely to reflect the clothing preferences of their target customer group, a closer look at customer groups and clusters of inspiration reveals that the diversity of both is far smaller than appears at first glance. Although, as we have seen, retailers assess their target customer group in terms of their clothing-buying habits, income level and fashionability, Table 5 indicates that many companies target the same customer age group. For example, all seven buying/design- and buying-led retailers in the sample, compared to only one design-led company, target customers in their 20s. The customer profile buying/design- and buying-led companies only branches out slightly on either side of this mark, i.e. to include 15–20-year-olds and 30–35-year-olds. Although there are differences in the level of fashion forwardness and price level among these retailers, it is likely that the customer on a budget will be able to pick up some of the cheaper garments from the higher-priced retailers and *vice versa*. In addition, retailers' practice of grading garments into fashion, newness and basic allows customers to spread their clothing purchases among a variety of shops since even the less fashion-forward woman may find a suitable garment among the more basic items of a highly fashionable retailer. Indeed, Brewis-Levie and Harris (2000: 55) suggest that it is common practice amongst womenswear shoppers to buy their clothes from a whole portfolio of retailers.

However, as indicated in Table 5, there is less of an overlap between companies that target older customers: while six design-led and two buying/design-led retailers target women in their 30s and 40s, the number of retailers who cater for

customers in their 50s and above decreases steadily – indeed only Rita/Sarah’s and Anne’s design-led companies target the mid-60s to 70s market.

The potential for sameness and market saturation is derived not just from the limited range of retailers’ target customer groups, but also from the fact that they draw from fairly similar sources of inspiration. As we have seen, all interviewees are aware of what is happening on the catwalks although the actual level of influence top designers have on retailers’ garment ranges depends on the fashion forwardness of the specific company – some may only take inspiration from the colours and fabrics, while others may seek to adopt entire trends (i.e. colours, fabrics and silhouettes) to fit their target market.

We have also seen in Tables 6a and 6b that there was much overlap in terms of the forecasting agencies used: a total of 7 interviewees, only 1 of whom was from a design-led company, stated that they used the same web-based forecasting service. Indeed, Table 6b demonstrates that the range of forecasting services used among buying/design- and buying-led companies, with the sole exception of Faye’s firm, is very limited. The narrow range of forecasting services used within the industry increases the risk of sameness while at the same time providing retailers with a false sense of security that the predictions they receive reliably reflect forthcoming fashions. Indeed, Wilson and Taylor (1989: 219) point out that the widespread use of professional forecasters in the 1980s has created a paradox, because it ‘has led not to more choice but to greater conformity and sameness as the results of the predictions are mass marketed and retailed all over the world’.<sup>21</sup>

The similarity of inspirational sources is not limited to forecasting agencies. As we have seen, all respondents listed in Tables 6a and 6b maintained that they visited at least one fabric show: *Première Vision*. While design-led retailers often visited fabric mills, some buying/design- and buying-led companies attend trade shows, such as *40 Degrees*, to obtain additional information on the forthcoming season. Even with regard to buying trips, Tables 6a and 6b indicate that certain locations, such as Paris and New York, were visited by a number of companies from all three retailer categories, whereas street fashion, celebrities and the media proved to be almost exclusively used by buying-/ design- and buying-led companies. Thus, although some sources of inspiration are more significant for one group of retailers than another, companies seem to draw from a very similar set of inspirational sources. This point is stressed by Leah:

*Leah:* ... everyone is actually selecting from a very narrow field, because everybody goes to PV [*Première Vision*], everybody goes to Petit [*Filati*], everybody sees the same trends, everyone sees the same magazines, the

same colour predictions, the same fabrics, everybody! Whether you are in America or here ... because the world has become such a small place ... you're jumping on a plane, you fly to New York for the weekend and then you come back and you pop over to Paris and then you go over to Florence and, you know, you zip over to wherever ... I think it becomes harder and harder and harder for people to be different, individual, move things forward ... really make a difference.

*(Buying Director, design-led retailer)*

The tendency to draw on similar inspirational sources, which is facilitated by improved communication channels and vanishing spatial boundaries, emphasises the self-validating and circular nature of fashion. For Baudrillard (1993, 1998) this is expressed in fashion's lack of reference to an outside world. He compares fashion with language: both are 'aimed ... at the social' – but, unlike language which strives for meaning, fashion 'plays' at communication and only 'delights in itself'. Through this loss of meaning, fashion has become 'signification without a message' (Baudrillard, 1993: 94): it no longer signifies anything but is pure simulation. Fashion today, is fashion for its own sake, which

... is never produced, but always and immediately *reproduced*. The model itself has become the only system of reference [...] With simulation, signs merely disguise the real and the system of reference as a sartorial supersign ... (Baudrillard, 1993: 92–5, original emphasis)<sup>22</sup>

What is interesting in Baudrillard's interpretation of fashion is his link between self-referentiality and loss of meaning. The data in this research show that, although fashion practitioners draw much of their inspirational sources from within the fashion system (trend shows, top designers, forecasting agencies, etc.), it would be inaccurate to suggest that these sources hold no meaning for them. Tseëlon (1994) stresses this incongruence in Baudrillard's interpretation of fashion by arguing that 'myth of origin can be invented post-factum. Rationales can be produced and added on, and incorporated into the ethos of a group'. She uses the example of catwalk shows which, as discussed earlier, set a cycle of adaptation in motion that proves the 'ceremonial qualities and signifying function' of these events (Tseëlon, 1994: 129).

Fashion not only 'feeds' off itself but takes inspiration from, and inspires developments in, other industries. Rita and Sarah, for instance, argue that it is not only companies within the clothing industry that draw on one and the same sources of inspiration for their colour palette, but also other industries that are, to some extent, colour driven. They maintain that Peclers – the colour service that they and other clothing companies use for inspiration – has clients from other industries.

*Rita:* The car industry uses these people as well. Anyone that produces anything that needs a ...

*Sarah:* ... direction of colour ... cosmetic companies as well ...

*Rita:* And paint companies, I am sure as well ... interiors ... so anyone ... it's not necessarily just the fashion business as such ...

*Sarah:* ... last season was a lot of talk about pearlised colours and that has come from the car manufacturers and leather. So a lot of the leather companies went pearlised on their leather and a lot of the lipsticks came back that were pearlised, and pearlised eye shadows ...

*Rita:* [or] ... when gold was on trend, you know, you suddenly started seeing gold cars about, didn't you? Like the Ford Ka and the Toyota Yaris and ... you know, so it does follow through ...

*(Fabric Buyer (Rita) and Designer (Sarah), design-led retailer)*

The self-referential nature of fashion is further highlighted by looking at the role of manufacturers in creating sameness among retailers. The following section shows that sameness is not only brought about by retailers' use of similar sources of inspiration, but also by the commonly used practice of 'copying from others', which is partially promoted and exploited by manufacturers.

## **5.6 Manufacturers' Role In Facilitating Sameness**

The manufacturer's role within the manufacturer-retailer relationship differ depending on whether or not retailers design all or a large percentage of their range in-house. The data suggest that there is a marked difference in this respect between design-led retailers, on the one hand, and buying/design- and buying-led companies on the other.

Five out of 7 design-led retailers in the sample design the entire range in-house in spite of the fact that their design teams only include 2–4 designers. The remaining 2 companies in the category (those of Anne and Sophia) split their range into approximately 75 percent in-house and 25 percent bought-in designs, even though their design teams are of a similar size. However, Anne and Sophia's companies are considerably bigger than those design-led retailers that design 100 percent of their range in-house.

In contrast, neither the 3 buying/design-led retailers (whose design teams are bigger than those of the design-led companies) nor the three buying-led retailers design their entire ranges in-house but rely instead on a mixed-product range, i.e. in-house and bought-in designs. While this mix between own and bought-in designs in buying/design-led retailers is tilted in favour of the retailers' own designs, buying-led companies, in contrast, rely more strongly on manufacturers. This is particularly true in the case of Kate's and Kim's companies, which are the only two retailers in the

sample without an in-house design team. The data suggest that retailers that use a large number of manufacturers' design ideas in their garment collection face a number of problems concerning issues of exclusivity.<sup>23</sup> This becomes clear when looking at the role of manufacturers in the transmission and manifestation of design trends, as illustrated by the following two quotes:

*Kate:* ... you are asking them [the manufacturers] things and they'll say to you 'Oh yeah, Top Shop have booked this and they have booked that and their colours are this' ... the suppliers will say 'We've just sold that to such and such'. And you get a feeling that way as well ...

*(Designer/trend co-ordinator, buying-led retailer)*

*Kim:* ... there's a feedback between the suppliers and ourselves. What we think is happening, what they ... 'cause the suppliers are obviously talking to every other retailer as well. So, you know, they actually have quite a good idea, get feedback straight away from everybody [and know] ... what everybody has been tuning into ...

*(Product Developer/Buyer, buying-led retailer)*

However, it is important to keep in mind that, while manufacturers are unquestionably interested in cultivating a good working relationship with retailers by selling them 'suitable' design proposals, they are also bound by certain outside restrictions. The following quote from Carla's interview highlights how (production) conventions in one sector of the industry, i.e. the primary or textile sector, influence the other two sectors: manufacturing and retailing. This is interesting because it is reminiscent of Becker's (1982) argument that the production of art is based on collective activity and that, consequently, if components or conventions change within an art world, the work produced changes as well. This claim is also supported by production-of-culture proponents who maintain that the organisational structures of culture-producing milieus influence the content and form of the artefacts they produce. These observations are echoed in the following extract which shows how conventions within one sector of the fashion industry (textile dyeing) influence the manufacturing and retailing sectors.

*Carla:* ... we are trying to minimise the amount of styles that we run and we are trying to do that by pushing what we've already sold to other customers. So that way we ... can optimise dying procedures and make-up procedures and ... even down to buying cottons and yarns ... Just by trying to push them in the same direction that we're already gone really . [...] they'll [the retail buyers] sometimes ask 'What does such and such have, who bought this, has anybody bought that?' And ... depending on how the meetings go sometimes you've got to lie 'Oh yeah, you know, somebody else has bought that ...'

*Susanne*: What is the smallest number of items that you are willing to produce?

*Carla*: ... per style we do, on the larger ladieswear where the usage of cloth is most it's, it's dictated really by the usage of cloth. We have to dye 10 rolls of one colour so on an outsized garment they can make probably 400 pieces, but on a regular-sized garment it'll probably make 700 or 800 pieces. (*Designer, buying-led manufacturer*)

Carla's description of her company's methods is reminiscent of *Première Vision*'s practice of supplying visitors with information on the daily 'Bests'. These are two good examples of how industry practitioners seek to narrow down and filter out certain trends or design proposals for promotion over the rest of the items within the pool of ideas. Yet another example of this method of channelling inspirations and information can be found in the way in which colours are originally chosen. According to Costantino (1998: 43–4), colours are fixed up to 2 years ahead of the season when members of the International Colour Authority (ICA) – which consists of delegates from leading fabric companies and colour services – meet in Paris to analyse colour trends for the target selling season.<sup>24</sup> They select approximately 30 colours that are divided into trend moods, i.e. seasonal variations, and send their reports out to the worldwide fashion industry and other colour sensitive industries 20 months ahead of the season.

These examples of how fashion forecasting is accomplished at a practical level by fashion industry practitioners bears some resemblance to Blumer's (1973: 334) discussion of 'collective taste'. Blumer (1973) emphasises the structuring nature of taste, which gives orientation to and moulds individuals' experiences of the world, while at the same time drawing attention to the fact that taste is itself 'a product of experience'. He highlights the important role of social interaction in the affirmation and refinement of tastes: it is through interaction with others that taste moves on 'from an initial state of vagueness to a state of refinement and stability' (Blumer, 1973: 334). By following a certain familiar and similar path of fashion forecasting which draws on a predefined field of inspirational sources fashion practitioners are exposed to similar stimuli and experiences/interpretations of fashion developments. Exposure to these sources helps practitioners to develop a common sensitivity or collective taste, which is 'an active force in the ensuing process of selection' (Blumer, 1973: 335) that sets limits and guides fashion practitioners' choices. The development of a collective taste among fashion industry practitioners is reinforced through the industry's internal mechanisms for information channelling (e.g. *Première Vision*'s 'Bests') and self-referentiality.

Industry conventions limit possible diversification at the outset and divert practitioners' attention into certain well-defined lines. While the knowledge that everyone follows similar trends helps to foster a sense of security amongst suppliers and retailers – a feeling that if everybody else is doing it, one cannot be wrong – it is also deeply problematic because it inhibits differentiation and fosters the sameness of the high street.

*Kate: ... the high street does look very samey, and if you asked people on the high street what they thought of the shops in the UK ... you would probably get a lot of people saying they are sick of seeing the same thing from shop to shop ...*

*(Designer/trend co-ordinator, buying-led retailer)*

Not surprisingly, therefore, some retailers have adopted strategies to protect their ideas from competitors. Large retailers, like Marks & Spencer and Arcadia, for example, have until recently insisted that their suppliers work exclusively for them, while others try to eliminate these risks by avoiding using suppliers who work for their direct competitors, or by modifying suppliers' samples to such an extent that they eventually carry the retailer's own style as signature. Another way of keeping ideas safe from competitors is to supply manufacturers with only minimal information, a practice used in Lisa's company:

We are in a position as well where we don't want to give them [the suppliers] too much information, because we don't ... you know they obviously supply other people on the high street so it's ... a little bit difficult. And everybody sees the same garments in the same show room, so it's difficult [...] there's a lot of stores that now want to ... have the same kind of products and we are suing a lot of different companies for kind of copying what we are doing.

*(Assistant Buyer, buying/design-led retailer)*

## **5.7 The Practice Of Copying Others**

Lisa's comments indicate that sameness is caused not only by the dissemination of information by manufacturers, but also through the direct copying of garments. Copying commonly occurs at two levels: from top designers and from other high street retailers. Subsequently, many garments in the shops are 'versions' of other garments, for instance 'watered-down' versions of top designer clothes. The practice of copying couture designs is by no means new. Ewing (1997: 72) argues that American wholesale manufacturers were in the habit of copying and reworking Parisian designs for their market at the beginning of the 20th century. Indeed, by 1911, recognising that the pirating of designs was inevitable, the *Chambre Syndicale*

de la Couture Parisienne arranged seasonal viewings for overseas buyers, who were given the option of buying models for copying. Those who did not want to buy toiles for copying would send entire teams to memorise garments and then draw detailed sketches 'which were dispatched to the manufacturers or model houses. These copies became the department store models which the cheaper end of the trade then in turn copied more crudely' (Wilson and Taylor, 1989: 92). In this respect, nothing much has changed. The only exception is that the time lapse between the first viewing of these designer 'prototypes' and the arrival of the first copies in the shops has been shortened; detailed information of the designer shows is now available within hours – for example, through web-based forecasting agencies such as WGSN. The ability of high street retailers to copy designer garments well and quickly is commented on by fashion writers and industry practitioners alike. Vernon (2000), for example, maintains that the high street has undergone a transformation, because

... right now, Oxford Street is where it's at because, for the first time in retail history, the high street is giving the big fashion houses a run for their money in producing the cult pieces of the moment. Oxford Street is at the epicentre of this shift away from the designer monopoly on cool. (Vernon, 2000: 55)

This is echoed by Jane, a designer for a manufacturer of branded clothes, who argues that customers no longer need to buy expensive fashion labels since very similar designs can be found at all levels of high street retailers. While she maintains that this similarity is good from a price point of view, she also finds this omnipresence of similar designs 'frightening' because no matter where you shop you are greeted by the same styles. Lisa also comments on the fact that the high street has become so fashionable that she hardly buys any designer clothes now.

It is not just top designer clothing that gets copied, but also garments from other high street retailers that are perceived as being directional and aspirational or that may simply promise immediate economic success.

*Jane:* I always speak to the retailers we supply. And I'll say, you know, 'Is there anything that's going really well that we haven't covered?' And then we'll maybe get a sample and adapt it ... which is a bit naughty, but it works. We've done it on a lady's jacket and we've sold hundreds ...  
(*Designer, Independent buying/design-led label*)

*Kate:* ... Top Shop is a great place to go for a designer and buyer, because ... in their flagship store, in Oxford Circus, they sample things ... to see the reaction ... they put every trend in there ... so it's a really good place to go and have a look, it gives you an idea of what's going to be around for the next, sort of, couple of months, 'cause nobody wants to get it wrong [...] If

you go around the high street and you think ‘Oh, that’s good!’, you go and rip it off. And everyone rips everyone off. Which is quite (laughs) a sad thing really, but it happens.

*(Designer/trend co-ordinator, buying-led retailer)*

Retailers may feel the need to imitate other retailers in the belief that, if everybody else is following a certain trend, it would be unwise not to do the same. This attitude is expressed by Francis, who works for the most fashion forward design-led company with the youngest customer profile within this category of retailers:

*Francis: ... if I go into every single high street store and ... ‘My God! They’ve got this.’ Then obviously if we haven’t, then we’ll need to have it because, if everyone is doing it, like everyone from Whistles high street to Kookai high street, if everyone is doing it, then we should be thinking about doing our own version of that, ‘cause there are obviously people who want it and everyone’s predicted it to be big ...*

*(Buyer, design-led retailer)*

Once again, we see that following what others are doing appears to be of prime importance within a market environment that is characterised by demand uncertainty. Sameness thus comes about not just through the dissemination of similar ideas during the forecasting stages and suppliers’ influence on retailers’ garment selection, but also through retailers’ and manufacturers’ practice of copying garments from others. Copying from other retailers may cause an even higher degree of similarity between shops because what is being copied has already been translated to a high street level so that even fewer changes may be needed to translate a garment into a workable version for a retailer’s specific market level. However, as the following section shows, the copying of garments from top designers and other retailers is a practice not universally employed by all retailers in the industry.

## **5.8 Designed To Be Unique: Design-Led Retailers’ Pursuit Of Difference**

In order to clarify the differentiation strategies employed by design-led retailers in comparison with buying/design- and buying-led retailers, we need to look once again at retailers’ use of other companies as sources of inspiration (see columns 6 in Tables 6a and 6b) and ask why do retailers go on shopping trips? While all retailers in the sample keep an eye on their competitors in order to compare price and quality (‘comparative’ shopping), some retailers, as we have just seen, look at more fashion forward and/or upmarket companies for ‘aspirational’ or ‘directional’ reasons.

Comparative shopping is used by retailers to construct their ‘price architecture’ (Leah). Thus retailers may look at the price ranges of their competitors’ dresses, for example, assess their quality and value for money and subsequently decide on their average opening and closing prices for their own dresses. This practice ensures that retailers stay competitive within their market bracket and avoid over- or under-pricing. The need to be competitively priced differs depending on the retailers’ market position. Producing the ‘right garment at the right price’ is more important for retailers lower down the market, while price becomes less of an issue amongst retailers in a higher market position. This is clearly shown when comparing statements from respondents who work for the lowest- and highest-priced retailers in the sample, i.e. Zoë and Tanya respectively. While Zoë, as mentioned earlier, points out the importance of providing their target customer group with good value for money, Tanya states that:

*Tanya: I mean ... in the other companies I’ve worked in ... [price] has just been one of the major tools, you know. Making sure you get your margin, making sure your prices are right ... it really isn’t so much a focus here at all ... Yes, it’s important but it’s not anywhere near as high up in the pecking order as in other companies ... if our customer surely loves something ... you can charge 300 but you could equally charge 400, she is not going to bat an eyelid. You know, she is not going to go to Oasis, Dorothy Perkins – checking out the different prices. She comes to us because she wants a label, she likes the brand and you know whatever we say the price is, she will pay.  
(UK Merchandise Controller and Buyer, design-led retailer)*

Although all retailers use comparative shopping to position themselves in the market *vis-à-vis* their competitors, an examination of the number of retailers who go on directional or aspirational shopping trips, both abroad and within the UK, reveals some interesting differences between design-led and buying/design- and buying-led retailers. It is here where design-led retailers’ differentiation strategy becomes most obvious. The data suggest that, because design-led retailers are less concerned with following the latest trends they seek to establish their own specific market niche by developing a unique style.

*Eric: It’s unique. I mean [this company] is ‘designed to be individual’ ... it’s our corporate phrase if you like ... it’s very unique ... you know when you buy a [garment from us] it really is individual and original and that’s where our strength lies really, in my view.  
(Senior Merchandiser, design-led retailer)*

This emphasis on developing one’s own stylistic handwriting is at odds with the method of directional shopping because individuality in style cannot be achieved

by copying or reworking buying samples. It is thus not surprising to find that design-led retailers tend to look at their competitors for price comparison rather than inspiration. This can be clearly seen in Tim's and Leah's statements below. Interestingly, Leah argues that at times it is difficult to lay claim to an idea as original, since high street retailers share similar sources of inspiration and hence fairly similar ideas may be picked up by more than one company. Exposure to similar stimuli and the fact that retailers do not exist in a vacuum, i.e. they need to look at their competitors so that they do not lose touch with the market, mean that a certain amount of interchange of ideas is inevitable. However, like Tim, Leah is very clear about the fact that her company does not intentionally go around to competitors' shops to copy ideas for their own use.

*Susanne:* Do you look at your competitors at all?

*Tim:* Competitors, yes of course, it depends on which context you take it ... we don't look at our competitors to extract ideas, it's more to actually make sure that we are competitive within the same competitive set ...

*(Buying Director, design-led retailer)*

*Leah:* I think we are constantly aware of what other people are doing ... because they are competition so you need to constantly check. I think that we try very much not to copy, well everyone does, I mean it's very difficult to know where the idea came from in the first place sometimes, because it's gone round and round the houses, [but] I wouldn't say that we would go into any of our competitors and pick something up and say 'Oh, yeah that's nice – let's do a version of it.'

*(Buying Director, design-led retailer)*

The strong rejection of the practice of 'copying others' and interviewees' own emphasis on uniqueness, which transpires in the above quotes, also implies a criticism of the 'high street', i.e. of those indistinguishable middle-of-the-road retailers that seem to dominate the UK retailing market. This is clearly illustrated in the following quotes:

*Sophia:* I think if you are design led you'll have those products but you maybe have a more individual product ... because I think we have ... some buyers are very much like 'Oh, this is the sweater to have – copy it!' And that mentality to me is: what's the point! Because everybody else is going to be copying it and if you do it in an inferior quality as well, then the customer is feeling cheated, as she'll get it for cheaper in another label ...

*(Designer, design-led retailer)*

*Sarah:* You can go to Oasis and buy a black pair of trousers and you've got identical ones in Warehouse and then you go to Top Shop and there's a more or less identical pair in there ... you've got three shops where you can

get exactly the same pair of trousers ... it's a bit pointless! ... I think it's lost its individuality, the cheaper end of the market.  
(*Designer, design-led retailer*)

Sophia and Sarah's statements not only highlight their belief that it is important for retailers to develop their unique style in order to distinguish themselves from other retailers, but they also provide insights into what causes the 'malady of the high street', i.e. the sameness of product found among lower-priced high street retailers. Although a certain cross-fertilisation of ideas is undoubtedly inevitable since everyone in the fashion industry is exposed to similar stimuli, all interviewees who work for design-led retailers rejected the idea of copying others, even though Francis, who works for the youngest and most fashion-forward of the 7 design-led retailers, concedes that if everybody else is following a certain trend, her company should get on board. However, she also stresses that:

*Francis:* [This company] ... is slightly different to the high street. We won't go out necessarily and copy what's in the stores. I mean it basically comes from design ideas, influences from, you know, the designers themselves.  
(*Buyer, design-led retailer*)

While Francis realises the importance of following general trends for her company, she makes a clear distinction between the copying of garments from others and designers' own interpretation of trends. It is in this light that one also has to understand Sophia's reference to 'individual products' and the 'pointlessness of copying others'. Like Francis, Sophia maintains that, while it is important to follow general fashion trends, it is even more important for design-led retailers to give their garments an individual slant, an interpretation appropriate for their target customer group and to resist copying garments that have proven successful for other retailers. Here, we see again the interplay of the dualistic and paradoxical forces of uniformity and differentiation that Simmel (1957) saw at the very heart of fashion: on the one hand, design-led retailers strive for uniqueness yet, on the other hand, they recognise the need to follow broad trends and to adhere to the currents within the larger fashion system.

Nonetheless, design-led retailers' emphasis lies on differentiation and one can now understand why this group of retailers tend to design their entire range, or at least a large percentage of it, in-house. In this way, they can achieve greater exclusivity by only minimally relying on suppliers for design ideas; this practice also makes it easier for them to develop their own stylistic handwriting and coherent brand image. Reliance on their own design instincts, rather than following every

trend and/or taking ideas from others, helps design-led retailers to create stronger, more consistent brand images. The importance of having a strong brand image is emphasised by Shapiro et al. (1992: 189) who point out that continuity of sales in culture industries can only be achieved through branding, i.e. by forging a link between the artist under contract and the cultural producers since it is the artist's image that adds value and creates desirability. Innovation alone neither achieves predictability nor continuity of sales within culture industries because, in the absence of a strong brand image customers, even if they are generally satisfied with the products, may not make their next purchases from the same company. So a continuity of styling or handwriting is an important asset that enables design-led retailers to elevate themselves to the level of a brand and create greater customer loyalty. This seems particularly important in a market that caters for women who have developed a certain style, i.e. who, as pointed out by Anne, do not wish to change all the time and who subsequently expect 'their' clothing retailer to follow familiar stable patterns. Rather than stifling creativity, design-led retailers' working practice of subtle innovation instead of abrupt fashion changes allows them to develop their own particular style and to readjust their market position so that they occupy a specific market niche. This also allows them to limit the numbers of their competitors.<sup>27</sup>

This section has not only shown that a certain extent of cross-fertilisation of ideas is inevitable since all retailers are exposed to similar stimuli, but has also highlighted that the differences between design-led retailers and buying/design- and buying-led companies lie in the degree of intentionality and the extent to which they rely on copying other retailers. Based on these observations it has been argued that uniqueness is less important to buying/design- and buying-led companies than it is to design-led retailers. Subsequently we must now look at and assess the kind of differentiation strategy that buying/design- and buying-led retailers employ in order to establish their place in the market.

### **5.9 Survival Of The Quickest? 'You Always Want To Be The First To Do It'**

While the previous section has shown that uniqueness is the over-riding differentiation strategy for design-led retailers, in this section buying/design- and buying-led retailers' differentiation strategies are explored. It will be argued that these groups of companies do not seek to differentiate themselves so much by developing a unique style, but rather by following fashion trends set by top designers and other prestige personalities. Therefore it is 'continuous innovation' that best characterises buying/design- and buying-led companies' differentiation strategy.

The level and speed of innovation depends on the market position of the specific retailer. Fashion leaders such as Alicia and Lisa's company, for example, are more radical and quick to adopt the latest trend. 'Quick response', at both manufacturing and retailing levels, is heralded by many as the only possible way forward. However, as we have seen in sections 5.2 and 5.3, the need to react quickly to new fashions is not homogeneous throughout the fashion retailing market but depends on the consumption patterns of the retailers' target customer group. While young, fashion-forward companies, i.e. many buying/design- and buying-led retailers, have to react quickly to emerging trends and changes in fashion we have seen that most design-led retailers, because they are catering for the more mature segments of the market, are less affected by the latest developments on the catwalks, etc. This significant difference between design-led retailers on the one hand and buying/design- and buying-led companies on the other can be seen by comparing Anne's and Kate's observations. As Table 5 (see pp. 160-1) indicates their companies are situated at different market levels in terms of customer profile, price level and organisational structure.

*Anne:* I think it [quick turn-around] is important in certain markets – so probably in Top Shop it's very important, 'cause you've got a little 18-year-old that's going to the club that night and she wants to knock them dead and she's worn that last week and there is no way that she's going to wear it again ... so, yeah you need to turn things round really quick for that market – it's very important – but ... It depends on the market- you can't apply it like a blanket to the whole market, it doesn't work. You know, a lot of our market is the woman who knows herself [...] So it's very very different and I think generally there is a lot of 'hurrah' about quick response. And, yes, on one level it's right, on another level it's not.

*(Fashion Director of Group, design-led retailers)*

*Kate:* ... the high street, very young high street fashion, works very close to the season. So we don't plan so far ahead ... we see things and 4 weeks later they will be in the shop ... very, very quick ... we lift a new trend ... we see Madonna and she's got these 'Rocco' t-shirts and 'Kylie' written on them ... we immediately go and get something like that sampled and put it in the shops. So we respond very quickly ...

*(Designer/trend co-ordinator, buying-led retailer)*

It is once again the fashion level of a company that determines its working practices – in this case, the importance of quick response. Looking at the group of design-led retailers in the sample we see that Sarah, Sophia, Tim and Leah share Anne's opinion that quick response is not of the essence within their market segment, while Francis and Tanya, who work for more fashion-forward design-led retailers,

disagree because they feel that catering for fashion-conscious customers necessitates greater reactivity. Although Tanya's and Francis' companies are design-led, which might suggest that they are less vulnerable to the general speeding-up of the fashion cycle, their particular market position and target customer group means they are more affected by these developments than any of the other companies in their category.

*Francis: ... I think, because of the amount of competition out there, we need to be able to have that flexibility with which to react quickly ... and turn it around in 6 weeks ... just to have it featured in maybe 10 of our stores, so everyone will [say]: 'They've got that already! We've seen it – they've got it!' ... so that we're recognised as being on the ball with what's happening.  
(Buyer, design-led retailer)*

*Tanya: ... I think now everyone realises that you've got to jump on the band-wagon. And whatever is shown on the catwalks you need to really get it in your stores pretty quickly ...  
(UK Merchandise Controller/Buyer, design-led retailer)*

Some interviewees who are working for design-led retailers such as Francis, Sophia and Leah, point out that quick response can compromise the quality of garments not only because it puts added pressure on the manufacturers, but also since it may prevent designers from putting sufficient detail and care into designing a garment. Thus, the speeding-up of the fashion cycle seems to give rise to two contradictory tendencies: greater fashionability and increased sameness. This may seem paradoxical but a closer look at the working practices of buying/design- and buying-led companies reveals the reason for this correlation.

As we have seen in section 5.4.1, traditional fashion forecasters are becoming increasingly obsolete to fashion-forward companies because these companies work so close to the season that they prefer to wait to commit to their fashion-sensitive products until after the catwalk shows. Instead of basing their design and buying decisions on vague forecasting reports, fashion-forward companies can now look at and copy 'concrete' garments – not just from designers but also from cutting-edge high street retailers. While this may eliminate some of the risks associated with forward production, it also means that individuality and variety are stifled. Faye's statement is instructive here:

*Faye: ... in the past we used to say 'Okay, it's going to be flowers and it's going to be these colours ...'; I based it on the forecasting predictions. But now it's much more cut-throat than that, even in the last few years. I mean it's much more ... if Versace has done this particular type of print then we have to have that particular type of print cause everybody else will have it.  
(Design Manager, buying/design-led retailer)*

This shows that in the past companies used fashion predictions as an approximate basis on which to build their own interpretations. Today, however, companies face a greater pressure to incorporate specific patterns, colours or silhouettes that have made an impact on the catwalks because companies know that these key trends will make an appearance on the high street. It is this type of pressure that has been described in Tanya and Francis' statements on the previous page.

It is interesting that increased sameness of retailers' garment ranges is directly connected to their (technological) ability to quickly adopt emerging trends for their market. Faye's observation that similarity between retailers is linked to their ability to work close to the season rather than the use of forecasting predictions appears to contradict Wilson and Taylor's (1989: 219) previously discussed claim that conformity and sameness are fostered by an increase in the number of professional forecasting agencies. It can be suggested that both of these developments, i.e. an increase in the number of forecasting agencies as well as companies' changed working practices, have contributed to the lack of differentiation from which large segments of the UK womenswear market suffer today. Thus, the greater availability of forecasting agencies from the 1980s onwards, as Wilson and Taylor suggest, helped companies to filter and channel their ideas and hence was a first step towards greater conformity. Nonetheless, the vagueness of the predictions still provided greater scope for individuality, even if companies sought to follow the forecasts fairly stringently. Today, however, many companies work so close to the season that they can now take their inspirations directly from the catwalks – as Faye has pointed out. Subsequently it can be argued that quick response entails a narrowing down of companies' focus and increases companies' ability to feed off each other by copying and doing versions of garments rather than designing them from scratch – a practice which, as will be shown in Chapter 6, is now predominantly restricted to design-led companies.

From these observations we can see why fashionability and sameness are closely interlinked: not only because fashionability is still defined as what 'prestige personalities' are doing and wearing but also, and more importantly, because the speeding-up of the fashion cycle makes the reproduction of fashion easier. In this respect, Baudrillard's (1993, 1998) criticism of fashion as endlessly reproduced from models is accurate.

Buying/design- and buying-led retailers' emphasis on speed is also reminiscent of Harvey's (1989: 157) argument that it is no longer goods that are being produced, but events whose turnover time is almost instantaneous. In an interesting way, uniformity of product which (as seen in Chapter 2) was associated

with Fordist mass production is being reproduced in a section of the fashion industry whose reactivity and reflexivity would make it an ideal example for an industry system adhering to the principles of flexible accumulation (Harvey, 1989) or reflexive accumulation (Lash and Urry, 1994). It could therefore be argued that speed, reactivity to demand and shorter shelf-lives of commodities do not in themselves guarantee greater variety and differentiation. On the contrary, when employed primarily to copy ideas from 'fashion ideals', these features contribute significantly to the lack of differentiation found among many of the 'quick-reaction' fashion retailers.

The data suggest that among the buying/design- and buying-led retailers there seems to emerge a type of mind set which accepts that many companies chase the same trends and customers and that it is not so much a question of distinguishing oneself through one's product, but rather one's speed in getting products onto the market.

*Alicia:* I think high street clothing has changed or retailers in general have changed so much even in the last sort of year and a half. The amount of very fashionable garments you can get now, you don't really necessarily have to go to the designers to get that something that looks different ... the high street retailers have had to become like that because competition is so stiff and you always want to be the first to do it.

*(Buyer, buying/design-led retailer)*

*Kate:* ... we have quite a good high street, but it's very competitive and it seems to be getting harder than ever really ... it's trying to come up with something new, and I think the high street, this end of the market, is very much a case of getting the thing in first [...] It is a bit of a rat race, it is a bit [like] 'Who is going to be first?' with the diagonal stripe, with the black and white prints ...

*(Designer/trend co-ordinator, buying-led retailer)*

This attitude of 'wanting to be the first' best describes the differentiation strategy employed by buying/design- and buying-led companies. The desire to react quickly is of course relative, depending on companies' level of fashion forwardness: fashion leaders are more reactive than fashion followers.

By employing speed rather than uniqueness as their overriding competitive strategy, we can understand why the speeding up of the fashion cycle causes a certain degree of conformity amongst companies and hence increases competitive pressure – a situation further heightened by the emphasis on continuous innovation as opposed to strong branding which, according to Shapiro et al. (1992: 189), may prove problematic in terms of establishing customer loyalty and continuity of sales.

However, 'quick response' also helps companies to reduce the risks associated with working in such an uncertain market as the fashion industry, because the ability to buy closer to the season, once trends have been determined from the information gathered throughout the forecasting/inspirational stages, reduces the risk of missing fashion trends or selecting the wrong garments. As emphasised by Jane, Kate and Francis (pp. 211-12), there is always the fear of missing a trend or simply getting it wrong. As a consequence, working close to the season and reacting quickly to emerging trends help companies to maximise their success. Moreover, as we have seen in Chapter 2, information systems such as EPOS help retailers to constantly monitor their sales and readjust their products, either by dropping slow-selling garments or by repeating the season's hits.

### **Summary**

This chapter has highlighted important similarities and differences between the three groups of companies in the sample in terms of their fashion level, target customer profile, sources of inspiration and the differentiation strategies they use in order to secure their competitive position within the market.

What has become clear throughout this chapter is that fashion companies oscillate between the poles of sameness and differentiation, which gives rise both to greater security and increased competition. The findings thus bear a resemblance to Simmel's (1957) interpretation of the function of fashion in society, which he describes as a paradoxical force that creates a sense of uniformity and differentiation at one and the same time. Like Simmel's followers of fashion who negotiate their dualistic need for belongingness and individuality through their choice of clothing, the companies in the sample are torn between their need to conform to the standards of the fashion system, i.e. by drawing on similar sources of inspiration, and the necessity to employ differentiation tactics, either through a uniqueness of style or quick response to new trends, in order to strengthen their competitive position in the market. A company's differentiation strategy depends on which tendency is stronger: imitation or differentiation. While design-led companies attempt to be unique in their product offering and style, buying/design- and buying-led companies endeavour to be faster than the competition in adopting the latest trends. However, both tendencies are always present within each company since all retailers have to interpret trends for their target customers, draw their inspirations mainly from the same sources and are part of the same industrial network. Sameness or differentiation between companies therefore does not exist in absolutes, but merely in degrees.

This chapter has analysed the working practices of womenswear retailers at the company level by comparing design-, buying/design- and buying-led companies' sources of inspiration and differentiation strategies. The following chapter offers a micro analysis of the womenswear retailing industry by looking at the division of labour between key players during the forecasting and selection stages.

## Notes

1. Baudrillard (1998) discusses this paradox of achieving personalization through consumption. He argues that:

... *the industrial production of differences* ... [ranges] differences ... hierarchically on an indefinite scale and converge[s] in models, on the basis of which they are subtly produced and reproduced. As a result, to differentiate oneself is precisely to affiliate to a model, to label oneself by reference to an abstract model, to a combinatorial pattern of fashion, and therefore to relinquish any real difference, and *singularity* ... (Baudrillard, 1998: 88, original emphasis).

Thus, the belief that consumers can achieve individuality if provided with a greater choices of goods is taken ad absurdum because, as Baudrillard goes on to argue, it is not through the consumption of goods, but only in 'concrete, conflictual relations with others and the world' that any real difference can be established.

2. The drop in the company's core womenswear lines seems by no means over. Finch (2004: 20) claims that clothing sales took a further downturn of 10 percent compared to 2003.

3. Bourdieu's (1975) essay '*Le couturier et sa griffe*' has not yet been translated into English and any references to it are drawn from secondary sources.

4. George Davies' Per Una collection accounts for 10% of Marks & Spencer's overall womenswear sales (Finch, 2004: 26).

5. The notion of prestige personalities can be related to some of the observations made in Chapter 2, which argues that designers have become modern-day 'priests and philosophers of our culture' (Jacobs and Kalman, in Yelavich, 1992: 33, cited by Press, 1995): However, giving designers and other prestige personalities such an influential role in fashion makes one wonder whether these people 'direct' fashion or whether they are merely the first to sense and give expression to it. If they direct fashion, their role would be similar to that of class-based social elites, whose influence on fashion has been discussed by Simmel (1957) and Veblen (1908); from this perspective, fashion is initiated by prestige personalities and emulated by others in the hope of taking on some of the celebrities' elevated status. However, if one assumes that prestige personalities do not actually initiate new fashions, but merely possess a finely attuned sense of cultural movements (the *Zeitgeist*) which allows them to be the first to acknowledge and promote a particular fashion, the origin of fashion itself has to be questioned. Blumer (1973), for instance, does just that in his analysis of 'taste as collective selection'. He argues that fashion cannot automatically equated with the styles of a social elite, but rather corresponds 'to the direction of the incipient taste of the fashion consuming public' (Blumer, 1973: 332). Similarly, it is only when fashion designers capture the momentary taste of their consumers that their name adds weight to their creations; fashion does not come into being simply because designers create garments, but only when their creations are in line with the public's taste.

6. Some interviewees also stated that they look at branded manufacturers for emerging trends as well as the street or dance clubs. Jane for example, who works for a manufacturer of branded clothing, points out that although she looks at the designer sections in department stores she is more influenced by other brands and street fashion.

7. This is reminiscent of Baudrillard who, according to Tseñlon (1994: 129), pointed out that 'even resistance to fashion is still defined within the order of fashion'.

8. Another exception is Vivian's company. As a manufacturer, her company has to follow the lead of its main retail customer, who attaches little importance to fashion trends.
9. Brewis-Levie and Harris (2000: 53) suggest that frequent stock changes are a far better way of enticing customers back into shops than other measures such as 'loyalty schemes' in the form of store cards, etc.
10. Eric and Tim's company has a wholesale division that is completely separate from its retail range; I am only concerned here with their retail range.
11. Exceptions within both categories are Vivian's and Carla's manufacturing companies, whose lead-times are influenced by the demand of their retail customers. Vivian's company works approximately 9 months ahead of season, whereas Carla's company's lead-times vary from 2 to 9 months.
12. Lisa who works in the same company/department as Alicia states that their fastest lead-time is 2 weeks.
13. The interview was conducted on the 26.07.01.
14. Moore (1995: 23) points out that impulse buying has significantly increased over the last 20 years. According to Yelanjian (1991, in DeNora and Belcher, 2000: 93) 60 per cent of all purchases are 'impulse' buys. This high percentage may also be due to retailers making frequent stock changes, as discussed earlier.
15. This is discussed in relation to conflicts between designers and merchandisers the following chapter.
16. It should be pointed out that interviewees were only asked about the influence of forecasting agencies and fabric/trade shows. Information on other sources of inspiration were gained indirectly from interviewees' descriptions of what influenced them in their design and buying decisions. N/A in Table 6a and 6b indicates instances when interviewees did not mention a specific source of inspiration.
17. Alicia maintains that some forecasting agencies work as much as 5 years in advance.
18. *Première Vision* publishes catalogues of fabrics and colours. The fabric catalogue provides an overview of manufacturers' cloth collections and contact details, while the colour catalogue displays the 'colour families of the season' – for spring/summer 2004, for example, these have been identified as 'quivering', 'refining', 'refreshing' and 'drying out' ([www.premiervision.fr](http://www.premiervision.fr), Fashion Info Spring/Summer 2004: 3).
19. Emap's 40 Degrees fashion show was discontinued in September 2002; first established in 1996, it produced a total of 13 shows. Similarly the Elite show, a London-based fabric fair was staged for the last time in 2002.
20. Before someone attains such an elevated status, they need to become accepted within their own cultural environment and to have successfully negotiated the selection stages that connect production, distribution and consumption within their own cultural domain. To take the example of musicians' influence on fashion: only those musicians (a) who have obtained a record deal; (b) whose records are available through the various retail outlets; (c) who are played on the radio, etc.; (d) who have sold a sufficiently high number of records to be profitable; and (e) who have reached a certain level of popularity amongst music audiences and prestige within their own culture industry are regarded as inspirational sources for other cultural arenas. Occasionally, musicians on the 'margin' of the cultural arena have the power to inspire styles, e.g. the clothes worn by some youth subcultures, such as punks or psycho-billies.
21. Costantino (1998: 74) dates the spread of fashion forecasting agencies slightly earlier, i.e. to the 1960s when the fashion world saw some dramatic changes with the advent of prêt-à-porter and increasing numbers of young designers. However, she maintains that the first and most prestigious forecasting agency is American based 'Tobe Associates', which was founded in 1927.
22. Simulation in Baudrillard's work refers to links between signifiers and signifiers, thus losing any connection to the real (i.e. the signified). Signification is abandoned in favour of free-floating signs that merely 'play' at communication.
23. The spiral of feeding off each other's ideas and of creating versions of garments becomes ever more steep if Carla's claim that she does as little as 25 percent of her designs from scratch is indicative of the working practices of other manufacturers. Unfortunately, this theme cannot be pursued due to a lack of data.
24. The first institution of its kind is the 'Color Association' of the United States, which has been assisting fashion businesses with their colour choices since 1915 (Costantino, 1998: 44).

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## **Chapter 6: Selection Processes Of Womenswear Retailers – Division Of Labour, Teamwork And The Ordering Principle**

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Grounded in the analysis of data gathered from interviews with designers, buyers and merchandisers this chapter seeks to devise a model of selection processes which illuminates the strategies adopted by womenswear retailers in order to survive in a competitive and uncertain market environment.

Some of the insights from Chapter 1 will be used as ‘sensitising concepts’ (Blumer, 1969) to guide the analysis. Thus, following Becker’s (1982: 9) suggestion that in order to ‘analyse an art world we look for its characteristic kinds of workers and the bundles of tasks each one does’, the discussion starts by looking at the division of labour between the three key occupational groups: the designers, buyers and merchandisers. Fashion forecasting and garment selection are divided into two distinct levels; at the primary selection level we find the forecasting and design stages, whereas the selection of actual garments for production takes place on the secondary selection level.

After highlighting the division of labour between key players at each selection level, the chapter goes on to show how the dynamics of teamwork, or ‘collective activity’, influence the decision-making process at each level. In particular, attention is drawn to the power relationship between the key players and the differences in the balance of power found between design-, buying/design- and buying-led companies. The chapter also looks at areas of conflict within the decision and selection-making processes and examines how practitioners overcome disparities in their occupational outlook. Not unlike Becker’s notion of ‘convention’, it is suggested that social actors need to share a common ordering principle in order to co-ordinate their activities sufficiently. This argument is strengthened by revisiting the primary and secondary selection level with the aim of showing how the creation of colour palettes and ‘storyboards’, as well as the narrowing down and modification of sample garments, can be used as indicators for the application of the ordering principle by key players at each stage within the production process.

### **6.1 The Division Of Labour Between Designers, Buyers And Merchandisers**

Designers, buyers and merchandisers have been identified as the three occupational groups who dominate selection processes at the high street retailing level of the fashion industry. In order to understand the contribution of each set of

key players it is useful to divide selection processes into a primary and secondary level. These levels differ not only in terms of their overall function, i.e. fashion forecasting versus the selection of concrete garments for production, but also in terms of how the actual work routines and the division of labour amongst designers, buyers and merchandisers are organised.

### **6.1.1 The division of labour at the primary selection level**

The first stage in the planning of the forthcoming season is the gathering of trend information and inspiration from a pool of secondary resources, such as forecasting agencies, fabric/trend shows and prestige personalities, which have been discussed in detail in sections 5.4 - 5.4.4. As we have seen, forecasting not only involves a considerable overlap of inspirational sources between companies but also follows a fairly structured biannual path. The forecasting process of colours and fabrics, for example, begins for most companies by attending major fabric/trend shows one year ahead of each season. This is consolidated nearer to the time with (trend) information from forecasting agencies and catwalk shows that help retailers to identify the silhouettes and key looks for the season.

In a fast-moving and unpredictable environment, such as womenswear retailing, it is important that all key players are aware of the latest developments in terms of colour, fabric and style since trend forecasting forms the basis from which seasonal ranges are built. As the following quotes show, designers and buyers alike need to be aware of the various sources of inspiration because both occupational groups work directly with the product.

*Susanne:* Who does the trend forecasting?

*Francis:* ... the design team will do that and obviously I will personally keep abreast of it, you know, the magazines, the shows, whatever, you know, I read anything I can, see what people are wearing on the high street and, you know, you do predict ... especially when you work in the industry you have a feeling of what could be the next thing happening. So they do it from their end and I will do it from my, kind of retail end ...

*(Buyer, design-led retailer)*

*Leah:* ... [the] biggest expectation I have of them [the designers] is that they are directing me and my team in terms of design trends. That's not to say that it doesn't come in from our side, cause I go to the shows as well. I go to Moda in Florence and I do the shops ...

*(Buying Director, design-led retailer)*

However, like Leah, all respondents pointed out that the responsibility for accurately predicting fashion trends lies with the designers; hence it is safe to assume

that fashion designers are the key players in the forecasting process within all three categories of retailers, as well as at the manufacturing level.<sup>1</sup> Designers' main area of responsibility during this stage lies in the sorting, narrowing down and selection of the strongest colours, fabrics and styles from a plethora of trend information and other sources of inspiration, which they then present to buyers in the form of colour palettes and storyboards. Storyboards literally refer to pin boards etc. which are used by designers to collect their ideas, cuttings, fabric samples and the like. In each given season designers work with a number of storyboards each with its own theme or, to use the industry term, 'story'. The stories themselves reflect what the company designers feel are the strongest trends they have gathered from the various forecasting sources. Faye describes this process as follows:

... we [the designers] create the initial research for the current season by way of shopping trips and trend prediction companies and gather all the information together. We then put together the colour palettes, the storyboards and themes ... We create the look and feel and ambience . [...] we then convey this information on to the buyers so that they then have a framework within which to buy each season from a point of view of colour and story and feel.

*(Design Manager, buying/design-led retailer)*

Faye's statement is not only interesting because it alludes to the sequential nature of the selection process – an important point in both Hirsch's (1972) and Crane's (1992) discussion of selection processes in culture industries – but also because it highlights the importance of teamwork or collective activity during the forecasting stage. In fact, 9 out of the 10 designers interviewed stated that they work closely with members of their in-house design team.<sup>2</sup> With the exception of one merchandiser (Sean) all buyers and merchandisers in the sample referred to forecasting as being done by the design team as opposed to one designated member. This emphasis on teamwork among high street designers relates to Becker's (1982) argument that artists cannot be seen as 'creative geniuses' working in isolation. The data suggest that designers, similar to Becker's artists, are directly and indirectly influenced by a variety of social actors as well as wider organisational and structural restraints. The affinities between these observations of the working practices of high street designers and Becker's study of art worlds will become clearer later on in the chapter when we take a closer look at how designers carry out trend forecasting, i.e. how they select specific colours and themes from a conglomeration of inspirational sources.

However, while designers pool resources and work as a group during the forecasting stage, a clearer division of labour among designers, as well as differences

between the retailer categories, comes to the fore once the actual design process begins. This interplay between teamwork on the forecasting stage and division of labour during the design process can be seen in Lisa's quote, an assistant buyer for a buying/design-led retailer. She states that 'we have an in-house design team ... they are all allocated to different departments and they work together as a group as well to create the trend areas.'

Although all companies in the sample follow the standard division of the fashion year into two main seasons (autumn/winter and spring/summer) and two subsidiary ones (Christmas and high summer), the way in which companies subdivide, plan and organise their product ranges differs. The data suggest that the organisational type of a company, i.e. whether a company is design-, buying/design- or buying-led, determines the way in which its product range is organised; which in turn influences the division of labour amongst key players. Table 7 below indicates that the great majority of design-led retailers do not subdivide their product into specific subgroups, but produce seasonal *collections* or *capsules*, whereas most buying/design-led and all buying-led companies split their range into *product areas*, i.e. knitwear, jersey, wovens, and so on. Only two companies in the sample differentiate products into *lifestyle* areas, for instance casualwear, formalwear, streetwear, etc.

**Table 7 Division Of Labour According To Organisational Type Of Company**

Type of division of labour	Design-led companies	Buying/design-led companies	Buying-led companies
Product areas	1	3	4
Lifestyle	–	2	–
Collections/capsules	6	–	–

The interrelationship between the arrangement of a company's products and the division of labour amongst its workers is well documented in the data. Sophia and Faye's statements are examples how the division of the range into subgroups corresponds with the split of designers, buyers and merchandisers into corresponding

teams: a company that has organised its range into product areas/lifestyle will have at least one designer, buyer and merchandiser, among others, in each of the teams.

*Susanne:* How would you characterise your main area of responsibility?

*Sophia:* It's knitwear and jersey, that's my area as well as a product area [...] This is an unusual company, we work in teams. So knitwear and jersey are a team, you have a product manager, merchandiser, designer and then you have buyers and then we have various assistants.

*(Designer, design-led retailer)*

*Faye:* ... we've got four very clear lifestyles and we then have a buyer for each area, buying all product types within that look, within that feel. So the buyer will buy, you know, dresses, trousers, suits whatever is necessary within that look. It's not split into individual buyers by product type.

*(Design Manager, buying/design-led retailer)*

The number of teams per retailer varies significantly. While the above extracts show that Sophia and Faye's companies have 4 teams each, Alicia/Lisa's company for instance has more than twice the number, i.e. 9 teams. The split of the clothing range into product area/lifestyle means that the proportion of buyers to designers in buying/design-led and buying-led companies is either evenly distributed, as in the case of buying/design-led companies, or clearly tilted in favour of the buyer within buying-led companies. Thus, two of the three buying-led retailers in the sample, namely Kim and Kate's firm, only employ one person to cover the design side. Kim's job title is 'product developer/buyer' and the actual design component in her job is minimal, while Kate works as designer/trend co-ordinator which means that she, in connection with her company's suppliers, is responsible for fashion forecasting and the designing of her company's range. The third buying-led retailer, which has recently been acquired by Anne's group of design-led companies, employs a team of two designers, namely Zoë and May, and 5 or 6 buyers.

The internal structure of design-led collection-orientated companies, on the other hand, shows some significant differences to the above observations. In Sarah's company, for instance, members of the design team are not allotted a specific type of product, but are rather given capsules to work on which can vary in their content. Designers may therefore design a formal range for one season while working on a more casual capsule the next.

*Sarah:* ... 100% of the range is done by four designers and that goes through from coats, bags, shoes- we do everything ... we have ... in a season approximately 12 different capsules ... Anyone of those may be occasion wear [or] one could be the more casual element [...] [and then there is] John who ... buys the complete range for all the shops.

*(Designer, design-led retailer)*

Sarah's statement also alludes to another interesting characteristic of collection-based design-led companies, namely the ratio between designers, buyers and merchandisers which is tilted in favour of the designers. Anne's group of design-led retailers, which consists of 7 separate brands, employs 14–15 designers compared to 3–4 buyers.<sup>3</sup> Similarly, Sarah's company employs 4 designers but only 1 buyer.

In addition to variations in the organisation of retailers' ranges and the designer/buyer ratio, the most significant difference between retailers' lies in the percentage of in-house designs that are used to make up a collection (see section 5.6). Thus, there are two groups of retailers: those which predominantly design in-house, and those whose ranges are 'bought in', i.e. built from various buying samples. Based on the research sample, it can be argued that the former group encompasses all design-led retailers, while the latter practice is employed by buying/design- and buying-led companies. This division is indicative of how companies build their range and reflects on their approach to designing: design-led companies value, what can be called, 'designing from scratch'; whereas buying/design- and buying-led retailers' range building can be referred to as 'pick and choose'. The differences in methods can be highlighted by the following statement from Sophia and Kim:

*Sophia:* ... we do a lot of sketching ... I start with a blank piece of paper, whereas some people tend to start with a bunch of garments and they kind of piece them together. [...] I went straight from college to Italy, where you do design very much ... the first few years in my career I didn't see people's garments to copy. You get to have to create everything. And I think it probably has made quite a difference ... a lot of people ... build a mock range and they do variations ...  
(*Designer, design-led retailer*)

*Susanne:* How do you put the range together?

*Kim:* ... I see a lot of suppliers, I will have been round all the stores and I see what's happening and it's very much, you know 'That's good from that supplier and that's good from that supplier. We haven't seen any of this or we'll ask them to make this for us.' You know, basically you just pick bits, and bits that are missing you kind of put in yourself [or] ... you ask them to make it for you or you send them a sample of something you want them to make for you.  
(*Product Developer/Buyer, buying-led retailer*)

Despite predominantly relying on in-house designs, some design-led companies use a small percentage of bought-in designs to either supplement certain areas of their range that are felt to be too weak or to add some last-minute updates to create a stronger fashion sense. For this reason a percentage of the overall 'buy', that is, of the companies' budget, is allocated to 'open-to-buys', i.e. money that has been

set aside to make last minute updates to the range. This process is illustrated by Sophia:

*Sophia:* ... open-to-buy ... the money that you need to put into the last-minute piece of the range is more the responsibility of the buyers. So in some respects they see more garments from the suppliers, they make maybe adaptations and they ... [she turns to Charlotte, her assistant] would you call it designing when they do that? It's not really designing, they kind of cobble together pieces ...

*Charlotte:* ...you could say 'adapt' really ...

*Sophia:* ... yeah, it's more adapting samples that they have seen, things they like, things they feel are missing.

*(Designer, design-led retailer)*

Sophia's statement is interesting for a number of reasons. Firstly, it shows that design-led buyers do have some influence during the design stages, while secondly, her derogative characterisation of buyers' 'design' work as 'cobbling together pieces' makes it clear that for her, true designing entails the creation of a garment from scratch and that the practice of adaptation cannot be classified as designing.

Yet, as seen in the previous chapter, it is exactly this method of 'doing versions' of sample garments that is widely practised among buying/design- and buying-led retailers. Subsequently, the process of range-building in buying/design- and buying-led companies takes quite a different format. Here, designers sift through the samples bought on their buying trips and determine how and to what extent they need to be adapted. Similarly, manufacturers' buying samples undergo some modifications in terms of colour and fabric or minor changes in style. However, mostly it is not the designers who see and select sample garments from suppliers, but buyers. In buying/design- and buying-led companies, designers' contact with suppliers is primarily restricted to passing on the companies' colour palettes and other trend information, whereas the buyers' role involves dealing with suppliers and building up close working relationships with them. Lisa provides an interesting explanation of the buyer-supplier relationship during the range-building stage:

*Susanne:* Do you choose designs from the suppliers ... ?

*Lisa:* Yeah, we go for appointments with them and I go with magazine tears, designs, ideas that I've got, things that I've seen. They also come to the appointment ... with all their ideas: things they've seen, things they are working on, things that they've got samples of, our work that has gone into development. ... usually we meet in a kind of appointment room, which has their garments hanging around the room, so if there's something there that's great we can just say 'Yeah, let's book it!'

*(Assistant buyer, buying/design-led retailer)*

In fact, the reliance of buying/design- and buying-led companies on suppliers for design input means that retail-based designers often limit their design activities to areas that have been insufficiently covered by the suppliers. This is illustrated in Kim's comment: 'we do rely on our suppliers to be quite strong on the developing side ... That makes our life easier, I mean we can do it if it's not there, but we rely on our suppliers a lot as well.'

It was particularly interesting to note that interviewees repeatedly remarked upon the difference between UK-based and overseas suppliers. While the former were generally felt to need less guidance, in terms of production/technical issues as well as in a fashion sense, overseas suppliers were characterised as less design-driven and as being in greater need of support to complete the orders. This differential assessment of UK and non-UK based manufacturers' skills is clearly reflected in the following quotes:<sup>4</sup>

*Zoë:* We design into the areas where suppliers haven't got good designers or they haven't got a strong design team. Most of the UK suppliers are very switched on and have very good design teams ... so the buyers can buy it straight away or we say 'That would be better with a shorter sleeve and in a pink or blue.'

*(Designer, buying-led retailer)*

*Faye:* We also design in-house and give the suppliers the sketches with which to create the look. It depends on how good the design facility is with the supplier base. I mean some of the suppliers are very design-led, others aren't.

*(Design Manager, buying/design-led retailer)*

Looking at the area of responsibility, or as Becker (1982) has termed it actors' 'bundles of tasks', we can observe some marked differences between design-led and supplier-based designers, on the one hand, and buying/design- and buying-led designers on the other. Designers in the former category, for example, dominate the primary selection level, both in terms of forecasting and the initial design process – their tasks are much broader than those of their counterparts in the second category and encompass other product-related areas beyond the immediate boundaries of their companies, i.e. fabric sourcing and the chasing of orders. Carla and Vivian, the two supplier-based designers in the sample, listed chasing orders and liaising with fabric/accessory suppliers, etc. amongst their areas of responsibility, while Jane, who designs for an independent fashion label, maintains that 'me and Sue do the full thing, you know, from the research of the new fabric right to the delivery'. Likewise, Francis describes the designers' 'bundles of tasks' in her company as being fairly comprehensive:

*Francis:* Design deals with suppliers ... I don't have anything to do with suppliers at the moment – no nothing at all ... They'll contact suppliers, they go and see the factories, they source the fabrics [...] the design team will do [the forecasting] ...

*(Buyer, design-led retailer)*

However, not all designers are happy that their job includes both forecasting- and product-related dimensions. For example Vivian, who is a design executive for a buying/design-led manufacturer, suggests that 'forecasting' and 'product' are two distinct areas of responsibility, which ought to be divided accordingly. Indeed, she suggests that companies should employ a specifically designated forecaster, which in fact used to be the practice in her own company. However, in Vivian's view, company managers do not see the need for such a division and subsequently the role got eliminated in her company.<sup>5</sup> Indeed only interviewees, Sean, the assistant merchandiser of a buying/design-led retailer, believed, although not with absolute certainty, that there was one person within the design team whose main responsibility is to forecast trends. Thus, the absence of designated forecasters within a company, as suggested by the data, confirms Vivian's claim that forecasting has become part of the designers' duties.

While design-led and supplier-based designers deal with trend forecasting and product-related issues, designers in buying/design- and buying-led companies concentrate most of their time on forecasting and the buyers instead have taken over many of the product-related tasks. Consequently, one can maintain that designer's area of responsibility in buying/design- and buying-led companies is more that of a forecaster than of a traditional designer and that the designers exert less influence over the range-building process than the buyers. This becomes clear in Faye's account of her main duties. She compares her present role of design manager for a buying/design-led retailer with her previous experience of designing for a number of suppliers. Faye has also formerly worked for a well-known design-led retailer where she occupied the dual role of designer and buyer. The fact that Faye has also some experience from a buying point of view makes her assessment of the division of labour between designers and buyers in her current company all the more interesting.

*Faye:* ... in comparison to other roles I had ... where designers are much more about the product ... the designer role within a retail operation such as this is much more about prediction and story building and colour and all those kind of things, rather than about the garment itself [...] I think they [the buyers] want us to give them information on what is going to be hot next. That is totally what they want us for. They are not so interested in our opinion on the fit of a garment, or the way it's executed or something like that. Which in some jobs is much more what the designer's role is about ... What they want from us is newness all the time, new stories, new colour

palettes, new themes, new inspiration, you know, much more a forecasting service really [...] When we give them the stories in the beginning they're very happy with that being our role, they are not interested in creating stories off the top of their head.

*(Design Manager, buying/design-led retailer)*

From Faye's portrayal of her duties, we can extrapolate some preliminary conclusions of how the division of labour between designers and buyers at the primary selection level within buying/design- and buying-led companies is organised. Thus, it seems that although designers dominate the forecasting stage, because they are responsible for creating the basis upon which the seasonal ranges are built, it is the buyers who dominate all product-related decisions at this level. It is the buyers, not the designers, who work closely with the suppliers and who choose sample garments that they want to develop further. Moreover, although designers in buying/design- and buying-led companies do design a certain percentage of the ranges, the task of designing is not exclusively restricted to the designers as the following quote shows:

*Alicia: ... they [the in-house designers] design odd things for us here and there ... they'll do sketches ... but a lot of the design comes from the team as well and suppliers. [As a buyer] ... you do a bit of ... designing yourself because ... sometimes nobody else knows what you are talking about, so you end up doing the sketches ... in your own head you know where the trends are going so you start the wheel rolling kind of thing.*

*(Buyer, buying/design-led retailer)*

Alicia's statement suggests that buyers not only exert an influence on the design stage because they see and develop suppliers' samples, but that they in fact contribute their own designs – which perhaps is not so surprising given that buyers, as we have seen in Chapter 5, attend the major forecasting events, etc. alongside the designers. We must thus conclude that the decision-making process within buying/design- and buying-led companies at the primary level is split between designers and buyers – not only in terms of the division of labour, but also with regard to the level of influence these two occupational groups wield.

It can be argued that distinctions in the content of designers' roles at the various levels within the industry is symptomatic of the two types of differentiation strategies discussed in the previous chapter. As we have seen, design-led companies' emphasis on uniqueness is reflected in their garment ranges which tend to favour individuality and internal coherence over fashion forwardness. For this reason, it seems highly appropriate for a design-led company to rely on a fairly small team of designers who are involved in the key stages, i.e. forecasting, design and other

product-related issues, such as the choosing of fabric, trims, etc. instead of allowing various groups inside and outside the company to influence the range. Moreover, the rather lengthy time taken from conception to delivery of the garments in design-led companies means that it is possible for designers to be involved in all of these stages. Buying/design- and buying-led retailers' emphasis on speed, on the other hand, makes it more difficult for designers within these types of company to be involved in the entire production process. Hence 'forecasting' and 'product'-related tasks have been split between designers and buyers. This division of labour frees designers to concentrate all their efforts on 'trend-spotting', which is particularly important in such a fast-moving market environment.

Having established the division of labour at the primary level, we can now move on to the secondary selection level and establish (a) who the key players are, (b) how they divide the responsibility of garment selection between them, and (c) whether the decision-making process at this level is based on teamwork or dominated by one group of key players.

### **6.1.2 The division of labour at the secondary selection level**

The main task for players at the secondary selection level is to build a seasonal range that is commercially successful for their company. The use of the term 'commercial' in the context of this research differs from Ryan and Peterson's (1982) analysis. In their model, 'commercial' refers to getting products accepted by the next person in the 'assembly line'. As we shall see, respondents in this sample however used the term to describe garments that are economically successful - 'commercial' in this sense is clearly connected to consumer acceptance.

While buying/design- and buying-led retailers have accumulated a selection of sample garments at the end of the primary selection stage, retailers which design all or parts of their range from scratch begin their secondary selection by choosing which design sketches to develop into sample garments. This means decisions have to be made as to how many and which of the numerous design proposals ought to be made up into samples. Design proposals are assessed in order to ensure that only the strongest and/or most commercial designs will be passed on to pattern cutters who will turn them into sample garments. Which group of key players is largely responsible for this task again depends on the organisational set-up of the company. In design-led companies, for example, this job falls predominantly into the hands of the designers, although in some cases the responsibility of choosing design proposals for sampling is shared with the buyers. According to Tim, who is the buying director of a design-led retailer, the design team of his company produces approximately 2 to

2.5 times more garments than are actually needed for a collection; this gives one a good sense of the number of design ideas that get discarded over the course of the selection process.

In buying/design- and buying-led companies, on the other hand, it is the buyers who decide which design proposals to convert into sample garments. For example Alicia, a buyer in a buying/design-led company, talks about looking through 'literally ... hundreds and hundreds of sketches and ... take out what... [they] don't think is right'. However, given that only some buying/design- and buying-led retailers design parts of their range 'from scratch', Alicia's experience is rather unique within this type of organisational set-up. It can therefore be argued that the selection of design proposals for sampling is a practice more commonly found within design-led retailers.

In addition to choosing which design proposals to sample, designers and buyers must also make initial decisions on fabrics and colours to determine the execution of the sample garments. This stage is therefore known as 'sketch and swatch' (Vivian).<sup>6</sup> Vivian, a design executive for a buying/design-led manufacturer, argues that it is useful to provide retail-buyers with a combination of choices at this stage so that 'they feel like they are involved in the process' – which of course they are, as Vivian herself concedes, because if the retail buyers do not like one of the silhouettes, fabrics or proposed combinations, the manufacturer will not continue with its development. However, manufacturers seek to maximise retail-buyers' acceptance of their samples by tailoring the selection of garments presented to the buyers to what they believe specific retail-customers will like. This can be seen in Carla's statement:

*Carla: ... every time we go [to a meeting with buyers] I'll put three or four [garments of a particular theme] in ... once they've [the retail buyers] ... pick up on a theme ... [it is good] to keep replenishing and updating the idea. It gives them a little bit more confidence and they'll instantly pick out that idea [again] if it's been a good seller for them.*

*(Designer, buying-led manufacturer)*

Once sample garments have been chosen from manufacturers and/or retailers' design proposals have been turned into actual garments, they are assessed at a number of selection meetings and decisions are made whether to pass them on to the next stage, modify or discard them altogether. During these meetings the number of samples becomes steadily reduced before a final selection of garments reaches the last selection stage where company directors have the choice (a) to exclude them from the range or (b) give them their final seal of approval which will allow them to

go into production. The various filter stages on the secondary selection level are discussed in section 6.6.2; for now we are once again concerned with the division of labour between the three key occupational groups.

There are a number of important differences between the two selection levels. For instance, in contrast to the primary level, the secondary selection level is characterised by the co-operation of the three sets of key players although, once again, one occupational group takes the lead. The dominant group at the secondary stage are the buyers, who work closely with other members of their companies' buying team, as well as with designers, merchandisers and, in some cases, suppliers. The broad scope of buyers' responsibility is reflected in Leah's statement:

*Leah: I am accountable for all [of the] product from its initiation through to delivery and back to stores. Everything from start to finish [...] I am the one who is responsible for ensuring that we provide our customer with balanced, commercial ranges at competitive price points, at a quality that we need to achieve, at the right time, in the right place. [...] I will set the retail price points, my team obviously works with me, I am responsible for the margin [...] it's a constant balancing act all the time of looking into all the different products and where you can manufacture it and who is good at doing this and who is bad ...*

*(Buying Director, design-led retailer)*

From Leah's summary of her responsibilities, we can see that the buyer's role involves a fair amount of planning not only to get the product into the stores for an agreed delivery date, but also in terms of building a balanced, competitive and commercial range. In order to achieve these goals, the buyers are supported by the merchandisers whose main tasks are to (a) analyse past sale performances in order to forecast future sales; (b) to grade the stores; and (c) to produce a 'buying grid'. 'Put simply, merchandising is about holding the purse strings for the buyer and ensuring that we maximise sale potential to the full' (Arcadia, 2004 job advertisement campaign).

As we have seen in Chapter 2, information on sales is available on a daily or weekly basis thanks to 'Electronic Point of Sale' (EPOS) systems which are now standard within womenswear retailing. The information gained from this detailed sales' analysis is used both immediately, to assess the success of garments while they are in the shops and to determine whether to repeat or drop certain garments, as well as for the planning of future ranges. Thus merchandisers and, to a lesser extent, buyers may base their assessment of the commercial viability of certain styles, colours or fabrics on the analysis of how similar one's have done in past sales.<sup>7</sup>

Sales' data is also used to 'grade' garments and stores. 'Grading' refers to the assessment of how successful certain stores and garments are. Sean, for example, explains the grading of stores as follows:

*Susanne:* How many different categories [of stores] have you got?

*Sean:* Oh, all-store, mid-store, top-store, top-top-store, then flagship and trial. So you can sort of explain that like ... all-store: every shop in the chain; mid-store: be half the chain ... from the best stores down; then top-store: would be maybe the best, sort of, 60 stores; and then top-top-store: would be maybe the best twenty; flagship: would be the best six; and then the trail: would be 25 random stores from anywhere.<sup>8</sup>

*(Assistant Merchandiser, buying/design-led retailer)*

While the grading of stores is the merchandisers' domain, the buyers' task is to grade the product. The grading of garments follows buyers' assumption of their appeal to customers. As we have seen in section 5.2 in the previous chapter, retailers assess their garments in terms of their level of fashionability into special/fashion, interest/newness and basic/core. Core garments, for example, have the lowest fashion content and appeal to the broadest possible customer group. Subsequently, core garments are ranked 'all-store', which means they will be distributed to all the retailer's branches; garments with a high level of fashionability, on the other hand, may be ranked 'top-store' or even 'flagship', and will only be delivered to stores in a prime location, with a high turnover, that attract the most fashionable segment of the company's target customer group. Thus, the grading of stores and garments helps merchandisers and buyers to organise the buying and distribution of ranges and to minimise risk.

Another important area of merchandisers' responsibility is the building of 'buying grids'. Based on their sales analysis, their predictions for the next season and their cash target, i.e. the profit they are hoping to make, merchandisers develop a range-plan or buying grid which tells the buyers how to spend their budget each month.

In Sean's observations below we can see the division of labour between merchandisers and buyers. While the merchandiser is responsible for deciding how many lines to run and how to divide them between the different grades, the buyer has to find the actual products to 'fit the boxes' and make the decision in terms of garment grading.

*Sean:* ... in August you need to have ... five all-store line, four mid-store lines, three top, three top-top, four trails . [...] We give them [the buyers] a line detail. It's like, it's almost kind of a buying grid. It will say ... how much money ... they've got to spend ... and then how we want it to be bought in terms of ranging. And then it's their range to go round and find all

the stuff to fit in the boxes ... yeah every month they get ... a buying grid to fill out ... [but] it's quite flexible ... It's not like: 'This is fixed in stone.'  
(Assistant Merchandiser, buying/design-led retailer)

Given that companies generally allocate a percentage of their budget for open-to-buys, i.e. last-minute fashion updates, the buying-grid is of more significance in the management of core lines since it is these high-volume ranges that earn retailers the most profit and subsequently need to be managed with great care. Not surprisingly, therefore, merchandisers' influence is more pronounced when it comes to buying these lines. This point is reminiscent of Crane's (1992: 69) observation that organisational gatekeeper's level of influence depends on the value of the products. She suggests that gatekeepers' involvement is greatest on expensive products and on inexpensive goods which are likely to generate a high revenue.

This difference between planning for the core and fashion elements of a range becomes clear from Alicia's description of her working practice. While Alicia, one of the buyers in a large buying/design-led company, is responsible for all the decisions regarding the grading, colour and style of fashion garments, it is the merchandisers who make most of the decisions on core garments. Not only will they determine the budget and the delivery time of the products, but they will also decide on the number of colour-ways and styling. In fact, Alicia's only input is on the colours that she will choose, lab dip and then confirm with the merchandiser before finalising the orders. 'Lab dipping' is an important stage within the colour-approval process. Once designers, or in this case buyers, have narrowed down colours and compiled colour palettes, a selection of them is sent to a fabric dyer who dyes a piece of cloth. This is of great importance since colour on a piece of paper looks more two-dimensional than it does on fabric. Lab dipping gives designers and buyers a chance to change their colour selections before they put cloth in for bulk dyeing

Being issued with a buying grid has implications both for buyers and designers' freedom of choice when putting together the seasonal range. Once again, there are obvious differences between the three categories of retailers. Looking at design-led companies, for example, we can see that the notion of the 'buying grid' is absent altogether<sup>9</sup> or becomes replaced by that of the 'design brief' which is issued not by the merchandisers, but by the buyers. While a buying grid influences buyers' and designers' decisions regarding the number of 'stories' that they can run and what grades they can be, a design brief is less specific. Although it gives designers some feedback on last season's successful garments that buyers may hope to follow-up, it does not seek to guide designers' creativity in terms of prescribing certain numbers

of garment grades. Sophia, for example, points out that instructions to designers in her company are fairly open ended.

*Sophia:* [In this company it is] much, much freer, much freer ... it's not such a formula-buying, maybe like a Debenhams or somebody, who'll be much more formulaic ... I don't work to that way of thinking. I think a little bit like that, but I don't ... like to be dictated to that extent.  
(*Designer, design-led retailer*)

The absence of strict designing and buying guidelines in design-led retailers is directly related to the fact that merchandisers' impact on the selection of the range in this type of company is less pronounced than it is in buying/design- and buying-led companies. This becomes transparent in Eric and Tanya's statements who both stress the powerful position of designers *vis-à-vis* buyers and merchandisers.

*Eric:* ... this [being design-led] obviously has direct implications for a merchandiser, because whereas ... traditionally companies may use the merchandising data to drive future ranges as well as obviously the fashions. We really have little impact, its whatever the designer decides is ... where we go really, to be honest [...] all the fashion companies you'll speak to, those that are design-led the merchandise department has the least say [...] if you've not worked in a designer-led business before ... merchandisers find it quite odd that they are not involved [in the selection process] ...  
(*Senior Merchandiser, design-led retailer*)

*Tanya:* ...everything starts with the designer and really kind of ends with the designer as well. [...] it's so design-led ... obviously I do my planning and my range plans ... but they [the designers] literally have ... a free hand to really just put together a range ...  
(*UK Merchandise Controller/Buyer, design-led retailer*)

Returning once more to Hirsch's (1972: 644) analysis of the organisational structures of culture industries, we can see that design-led retailers' division of labour most closely resembles that of 'craft administration of production'. Hirsch argues that the managerial level within the first gate-keeping system delegates the responsibility for creating cultural innovations to the technical subsystem, while they themselves are responsible for setting budgetary limits. This division of labour between the managerial and technical subsystems means that the former is in a less powerful position than the latter when it comes to deciding which cultural artefacts to produce. Similarly, the division of labour in design-led womenswear retailers suggests that the designers (Hirsch's 'technical' subsystem) are in a more powerful position than merchandisers (the 'managerial' subsystem).

By drawing attention to the influence buyers and merchandisers exert on designers in buying/design- and buying-led companies through the buying grid, we

have added another layer to our analysis of the power relationships on the primary selection stage. Not only do these observations further diminish buying/design- and buying-led based designers' level of sovereignty over the forecasting and design process, but they also tips the balance of power between designers and buyers within these categories of retailers further towards the buyers. This raises the questions (i) whether one occupational group dominates the decision-making process to such an extent that they ultimately have the last say as to which garments will and will not be chosen for the final range, and (ii) whether the selection processes at the secondary level can be described as teamwork, despite the seeming dominance of one occupational group, which will be discussed in the following section.

## **6.2 Power Struggles And Teamwork**

Interviewees' response to the above questions are very interesting. With the exception of Tanya, who argues that she has no influence over approximately 30 percent of the buy, which she is forced to take (despite being convinced that these garments are 'commercial suicide... [and have] "mark-down" written all over them'), all interviewees stated that the buyers have the last say in their company since they have complete control over the money that buys the range. This is true in all three categories of retailers, although overall the position of designers in design-led companies is stronger and they have more scope for negotiations, than their counterparts in buying/design- and buying-led companies. Nonetheless, even in design-led retailers buyers are the dominant players on the secondary selection level because they have the power to sanction or veto any product-related decisions. In fact, buyers not only influence the selection of garments by choosing or rejecting them but, as we have seen, also shape the final range through the way in which they grade garments, i.e. by manipulating the ratio of what they perceive as safe (all-store) and more risky (top-store) items, as well as by the modifications to which they subject clothes before admitting them into the final range. These issues are explored in sections 6.6.1 and 6.6.2 in connection with the analysis of the filtering stages on the primary and secondary selection level.

By conceding that, in general, buyers are the dominant occupational group within the garment selection process of womenswear retailers, Gilmore's (1990: 152) claim that interaction in formal organisations is regulated through hierarchical structures seems to be validated. Indeed, even more so since, as pointed out at the beginning of this section, the final selection stage that any prospective range has to pass through is at director level. Rankine (1999b), for example, provides a vivid

account of the lengthy and hierarchical process involved in Marks & Spencer's range selection by quoting a former M&S employee:

You could go through this incredibly detailed process, with formal presentations lasting three or four hours with three different layers of management ... finally you would present, say, the knitwear collection to Greenbury [the company's chairman]. He could take one look and suddenly shout: "I hate this bloody red. Get rid of it." Everything would have to be immediately changed and you'd go through the whole process again. (Rankine, quoting anonymous source, 1999b)

Marks & Spencer was in fact renowned within the industry for this 'top-down' form of decision making which, as we have seen in Chapter 5, made for a rather inflexible organisational structure. Moreover, this rather authoritarian approach to range selection carried with it the danger of suppressing any opposing opinions and of stifling innovations - so much so that Marks & Spencer's corporate culture of the 1990s is said to have been largely responsible for the company's demise.

Although there is obviously a hierarchical element to garment selection, Marks & Spencer's rigid structure seems to be the exception, not the norm, for today's womenswear retailing industry. Thus, we have to look beyond these obvious power structures to understand the realities of the working practices in the UK womenswear industry. It is not only at the director level that decisions are being made: throughout the selection process buyers, designers and merchandisers – albeit to varying degrees – influence the seasonal range before it is presented to the directors. Indeed, Sean's comment indicates that selection at all levels is largely based on teamwork not hierarchy:

*Sean:* ... this place is very much about teamwork. There is no one person or two people who can say 'This is no good! We won't do it!' That doesn't happen ... you don't have that hierarchical ... view taken ... everyone's opinion is considered. As long as you've got an argument to back up why you do feel that way.

*(Assistant Merchandiser, buying/design-led retailer)*

The sequential nature of selection processes means that product directors only see and make their final decision about a range that has been shaped by people further 'down the stream' who have worked with the product on its way to this final selection meeting. This observation supports the claims of Becker and production of culture practitioners, who argue that the collective activity of cultural producers shapes the artefacts that are produced; it also reflects respondents' own interpretations of their working practices. While the data show that all interviewees

have a clear conception of the 'chain of command' and of their own level of power and influence, they nonetheless portray selection as teamwork.<sup>10</sup> This can be clarified by looking at the following, seemingly contradictory, statements from two buyers: although Alicia and Leah both acknowledge that they have the 'last say', they also emphasise the importance of teamwork.

*Susanne:* Would you say that the overall selection of garments is based on teamwork? That everybody's got their say?

*Alicia:* Definitely! If we didn't all pull together we wouldn't get anything in.

*Susanne:* So what happens if there is any conflict, who does have the last say?

*Alicia:* Me.

*(Buyer, buying/design-led retailer)*

*Leah:* ... I make the decision on whether we buy it or not. It's my responsibility. I write the purchase order, I sign every purchase order that goes out of this business and if design come up with something that I fundamentally feel is not right, is not commercial and is not going to sell that's my decision. [...] here it's very team oriented. I would not sit here and say 'I don't like it I don't think I am going to buy it.' It's much more a 'Why do you feel very good about it? What is it about it? Explain it to me!'

*(Buying Director, design-led retailer)*

The interplay between teamwork and power struggles is not restricted to the secondary selection level. Sophia, for example, argues that while designers 'pool resources' during the forecasting stage, the fact that her company is split into product areas means that conflict can arise between the different teams when it comes to deciding how the looks/stories are divided between the different departments. Although Sophia maintains that 'each department probably has a separate ... time when they kind of take the lead', she also points out that there are differences between departments' level of power which are related to their commercial success.

*Sophia:* I came from a very strong position in the company, good solid history, good sales figures and a known handwriting. So for me it's not difficult to say 'I am sorry, I can't accept that. It's not good enough.' I am in a confident position, I am able to make a lot of decisions. Other departments which are not doing so well ... it's a lot harder for them to make decisions ... it just depends where you are in the company.

*(Designer, design-led retailer)*

Faye makes an interesting point when she argues that there is less conflict during the forecasting stages than there is when it comes to the actual selection of garments, because selection is 'a process of elimination ... it's never stagnant, it's ever changing'. Although conflicts may arise during the initial forecasting stage, once decisions have been made on the colour palette and stories for the season, these

decisions cannot be dramatically changed because commitments have to be made on products with longer lead times. Thus, subsequent changes in the colours or stories would mean that those garments that have already been booked would no longer fit with the rest of the range. Individual garments with shorter lead times, however, can be changed up until the moment they have to be booked, as Faye's statement shows:

*Faye: ... you can walk in the room one minute and literally come back five minutes later and they'll have something else on the wall. I mean, it really is ... things are constantly coming in from the suppliers all the time so you can see better and better and better and better ideas all the time, so it's not, it's not a negative thing, it's an improving thing ... basically they'll [the buyers] just get more and more samples given them, but they are better and better than the last ones. Right, and they [the buyers] leave that right up until the last minute to book that ... you know, it's an absolutely last moment, just in case anything better comes along.*

*(Design Manager, buying/design-led retailer)*

Drawing on Faye's observation it can be suggested that, compared to the forecasting level, the garment selection stage is more dynamic and that product-related decision-making processes are more prone to conflict owing to some overlap between designers' and buyers' areas of responsibilities. While 'forecasting', as we have seen in section 6.1.1, clearly falls into the domain of the designers - a fact all buyers and merchandisers in the sample accepted - the division of labour in terms of 'product' is more ambiguous. In design-led companies, for instance, both designers and buyers share this responsibility, while in buying/design- and buying-led companies, buyers seemingly monopolise this task. Even in cases where designers are mostly confined to trend prediction, conflicts are likely to arise during the secondary selection stage because designers, for various reasons, may not wish to completely abandon all influence over their ideas and creations to buyers. This problem of 'having to let-go', from a designer's perspective, or 'taking-over', as buyers' describe it, can be illustrated by the following statements:

*Faye: ... [in terms of] themes and stories, they [buyers] don't really question what we tell them. They are happy - that is what they want us to do [...] When it actually gets down to the product that's when they get a little bit more ... keen to hold on to the project ... we give them the stories ... the framework ... But once they've got that ... they kind of take it off [us] and they ... I think they kind of forget that we ever were involved in it [laughs].*

*(Design Manager, buying/design-led retailer)*

*Leah: ... there comes a point where design have to let go, because they are working even further ahead [and] I am constantly going back, there'll come a point probably where I'll and my team will ... say 'Well, okay forget about it, you can't do any more of it, you've got to go ahead!' So we'll*

review it and we'll add [things] if we think that we need to ... So there is a point where the thrust switches over and ... at the end of the day we are making buying decisions anyway ...  
(*Buying Director, design-led retailer*)

Faye's quote suggests that designers, far from being uninterested players who mechanically pass on products through the assembly line – as Hirsch's (1972), and Ryan and Peterson's (1982) models would suggest – hold a personal stake in the products they are creating. This can be linked to some observations made in Chapter 1; i.e. Freidson's (1976: 311) argument that individuals seek to control their work and Hughes's (1971: 339) observation that work forms an important part of people's social identity may help to explain why designers find it difficult to let buyers take over. Viewed in this light, we can appreciate that selection processes are likely to be more conflictual than originally suggested by Hirsch, and Ryan and Peterson.

Leah and Faye's statements show a certain reluctance on the part of designers to step back and let the buyers take charge of the further development of 'their' stories, as well as a necessity for buyers to take over because they are working closer to the season and are hence in a better position to go over the product and make any necessary alterations to it. In order to sufficiently understand the designer-buyer dynamic, we need to look again at the differences between the three retailer categories.

### **6.3 The Distribution Of Power Amongst The Key Players**

As mentioned in the methodology, the categorisation of retailers into three groups is based on respondents' own definitions of the organisational structure of their company. Although three sets of key players have been identified as being involved in the various selection stages of womenswear retailers, none of the respondents claimed that their company was merchandising-led with merchandisers as the most influential actors in the selection process. Indeed, the data clearly show that the relationship, or power dynamics, between designers and buyers is of significance in the categorisation of retailers.

In order to understand the main characteristics of design-led companies, we need to take into account some of the issues raised in the previous chapter regarding retailers' differentiation strategies. As we have seen in section 5.8 in the previous chapter, design-led retailers pride themselves on their unique product range and distinctiveness of style, which is largely achieved by concentrating their design efforts in-house. As shown earlier, design-led companies' reliance on their in-house design team has direct implications on the breadth of the 'bundle of tasks' of these

designers. Not surprisingly, designers' abilities to work with garments from the conception to the manufacturing stages and lesser restrictions from design briefs etc. on their work, mean that designers in design-led companies can exert a greater influence at both the primary and secondary selection level. It is therefore not surprising that, when characterising their company as being design-led, respondents refer to two related themes: (1) 'uniqueness of clothing range and/or predominance of in-house designed garments'; and (2) the 'powerful position of designers within the company'. This claim is supported both by Eric and Tanya's assertions of designers' ability to direct the range (see p. 239); and in the following comment from Sophia:

*Sophia: ... as a company we are known for being design-led, because we design our own things in-house ... it's design-led, which is probably why I was attracted to come here at the beginning, because I am used to being more free and less disciplined, less controlled ...*  
*(Designer, design-led retailer)*

However, arguing that designers hold a powerful position within design-led retailers is by no means the same as maintaining that they have the last say, i.e. that they ultimately preside over the content of the seasonal ranges. This follows the earlier observation that, with the exception of Tanya's company, buyers make the final decision in the selection of the garment ranges. In designers who are working for design-led retailers have varying degrees of control over the composition of the product range. This can be clearly seen in Leah's account below, in which she compares her experience of working for a more strongly design-led company, with the working relationships in her current position. While her present company fulfils the first criteria of a design-led company in that it has a strong in-house design input, it is weak in terms of the second characteristic since buyers, although they are involved in an ongoing dialogue with the designers, ultimately make the decision as to what to include in the range. Even though designers in design-led companies do not necessarily have the power to make the ultimate decision as to what makes the collection; they nonetheless influence the decision-making process at both selection levels and are in a strong enough position to influence buyers to include some garments that may not be great commercial successes, but are important from a fashion point of view.

*Leah: ... if I looked at ... the role I have here and the role I had at French Connection ... the big difference is that fundamentally here I make the decision on whether we buy it or not. It's my responsibility ... At French Connection it wasn't fundamentally my decision ... design had much more design freedom to put together the collection that they believed was right. So*

I would say, we are design-led in the sense that everything is designed in-house, we don't go and buy from other people. So we are leading it in terms of designing it here, having to go out and get the trends and rank it fit to what we think [the company] is all about and who the customer is, but it's not design-led if you mean: do design make the ultimate decisions, cause they don't [...] So it is design-led, but it isn't design-led. It's a very two-way thing. Very much debating, discussing, but the ultimate decision falls down to me and ultimately I am accountable if it doesn't work.

*(Buying Director, design-led retailer)*

Although design-led companies, such as Leah's, design , most of their range in-house they are not so different from buying/design-led companies in terms of the designer-buyer power relationship. In both cases, buyers ultimately dominate the secondary selection level although designers can exert some influence on their decisions. The affinity between the 'weaker' design-led companies and buying/design-led ones becomes clear from Faye's comment below:

*Faye: ... this company is particularly design and buying led ... Design particularly from ... the initial vision of the brand and ... the overall colour palette and the way the store will be visually laid out is very much design-led ... the looks and feels and that comes totally from the design. And then buying are obviously very involved on the actually product, but we work very closely together to create the desired effect, really. So yes, I'd say that it's an equal partnership really with a different emphasis on the two sides.*

*(Design Manager, buying/design-led retailer)*

Although the division of labour into forecasting (designers) and product-related issues (buyers) is clearly defined in buying/design-led companies, Faye portrays her work as having a significant impact not only in terms of trend forecasting but also on the visual displays in store and the overall brand image. Even though designers' level of influence in buying/design-led companies is not as high as in design-led ones, Faye's statement suggests that buying/design-led based designers nonetheless occupy a fairly influential position within the company.

On the contrary, the data suggest that the balance of power in buying-led companies is more clearly tipped in favour of the buying side. This is evident in the designer/buyer ratio and indeed the absence of an in-house design teams from some buying-led retailers both of which result in the companies' strong reliance on manufacturers. In this category of retailers, designers are most clearly confined to the forecasting role and have less scope for influencing buyers' decisions. In addition, the market position of this type of retailer is closer to the value end, which poses more constraints on designers and buyers alike. This means that the garment range in buying-led companies is driven to a lesser extent by design-based decisions than it is in buying/design-led companies. This is reflected in the comments of Zoë and May,

who are the 'design team' of a large buying-led retailer. Their observation shows that they are fully aware that they are working in an environment in which designers have far less influence over the collection than buyers.

*Zoë:* We work slightly differently here. It's more a buying led company ... the buyers see a lot of suppliers. So they have ... trend information from suppliers as well and we give information [...] we are a buying led company and I would say if we worked with someone like Karen Millen or Top Shop we would be a lot more ... inflexible in our views. Wouldn't you?

*May:* Yeah! I think we are very ... flexible ...

*Zoë:* ... I think we have to be here as well ... [This company is] very value driven ... if it was between two things – we like one, the buyer likes the other – it's the buyers' area ... it's their name on the line [...] if they feel it's more commercial to go ... with the safer colour or whatever, yeah ... it would probably be that ... (laughs)

*(Designers, buying-led retailer)*

Zoë's comparison of her relatively weak position as a designer in a buying-led company with what she imagines working for a more strongly design-led company would be like, shows that our earlier observation regarding the stronger position of designers in design-led companies is shared by industry practitioners. Indeed Kate, who works as the only designer in a buying-led company and who has most recently left design college, makes an even sharper comparison between the role of designers at the various industry levels. It can be argued that her expectations as a student of the role of designers closely resemble that of a layperson. As a relative newcomer to the industry, she not only makes a very important observation regarding the designer-buyer power distribution, but also dispenses with the myths that surround the persona of the designer. Like Becker (1982), who destroys the notion of the artist as creative genius and replaces it with that of art as collective activity, Kate's short experience of working in the industry has taught her that the realities of being a commercial designer, i.e. of working for a high street retailer, are very different to the (romantic) conception many people have of what it is like to be a creative designer.

*Kate:* When I was a student, I always thought the designers had the say ... they sort of control it all ... but actually it's quite different. It's the buyers ... But obviously, the more upmarket you go, than the designer has their handwriting, and has their signature on it... we are only copying trends. [Whereas] ...they are selling themselves in their designs and their label and their image. So then the designer will have the say. But this end of the market, it's ... it's very much about buying, about getting the product right for your customers. So the buyer is quite powerful, and they can say to their supplier 'Alright I want this and this design.' As a designer and supplier you have to design what the buyer wants [...] I've got friends who are creative

and they said to me after finishing their degree 'Alright, if I can't do what I want to do, being creative, than I don't want to do it all' ... doing a job like this it is creative ... [but also] it is a compromise ... any designer, from any field, [has] to come up with goods to make money ... that's what it is about really ... it's creative to a point ... but ... you have to ... [follow] trends ... it is not the case of making them up yourself.

*(Designer/Trend Co-ordinator, buying-led retailer)*

This quote also indicates that the tension between conception and reality, in this case the strain to reconcile one's creative ambitions with the commercial constraints of the industry, forces social actors to negotiate between the two in order to find a compromise. This can also be seen in Leah's statement, which draws a clear distinction between haute couture and the commercial constraints of the high street retailer:

*Leah:* ... I think it depends whom you are designing for. If you are Alexander McQueen you'd design what the hell you bloody wanted, because you are Alexander McQueen and you can do what you want ... you're leading fashion. You're creating it, you are directing it, you're responsible for everything that is filtering down to the high street. To be a high street retailer, who has to be commercial, you have to understand the market and you have to understand that woman who is coming into your stores.

*(Buying Director, design-led retailer)*

Kate and Leah's observations provide interesting insights into what it means to be creative. For them creativity is connected to the ability and power to be the originator of a fashion trend. This definition of creativity stands in conflict to the realities of the high street womenswear industry, because fashion trends do not originate at this level. As we have seen in Chapter 5 fashion on the high street level very much takes its direction from other sources: prestige personalities, catwalks etc. Even design-led companies, though more unique in their interpretations of the current taste, lack the momentum and impact to create what can be called a 'fashion trend'. Thus, high street fashion practitioners have to negotiate their own need for creativity with the constraints of working at a level of the industry where market demands dictate what they can and cannot do. This interplay of creativity and commerciality is a very important one and needs to be considered in any analysis of culture industries. In the case of the womenswear industry, these tensions are particularly acute in the designer/buyer relationship and we must consider them in our assessment of these players' power struggles.

## 6.4 Conflicting Rationales

Whilst the overall selection process is based on teamwork the existence of some power struggles between the key players suggests that the decision-making process is not entirely conflict free. Conflict in the context of this research has been defined as a clash of perspectives or discrepancies of rationales (Shibutani, 1955: 568) – a definition that tallies with respondents' own interpretations of conflict during the selection processes.

Though conflicts can arise due to personal differences between key players, there is a broader dimension to it that goes beyond the realm of the individual. The data suggest that this is largely to do with discrepancies in key players' rationales, i.e. the basis on which they form and justify their decisions, which can be motivated by aesthetic/creative or commercial concerns. Before we take a closer look at examples of conflict during the selection stages, it is useful to go over some points raised in connection with the discussion of 'social worlds' in Chapter 1.

According to Shibutani (1955: 566), social worlds arise wherever people are jointly engaged in a task of a repetitive nature. It is these collaborative activities that constitute the basis for direct, meaningful relationships and shared definitions or, what Becker (1982) called, 'conventions', among people within a social world. People who share a certain outlook are able to anticipate the behaviour of others within the group and can direct their actions towards them. This implies that the perspective of the larger social group (the generalised other, to use Mead's words) is implicit in individuals' actions. The realisation that human behaviour is (relatively) orderly and predictable is one of the fundamental principles of symbolic interactionism.

If we apply Shibutani's definition of social worlds to the womenswear retailing industry, it becomes clear that the division of labour between key players gives rise to a number of interconnected subworlds: those of the designers, buyers and merchandisers. These subworlds emerge due to differences in occupational outlooks between the key players and it is these differences in outlook or 'conventions' that provide potential areas of conflicts during the selection processes.

As we have seen, designers need to compromise between the conflicting issues of their creative 'instincts' and commercial concerns – although the need to be commercial varies between companies. Nonetheless, all designers in the sample were aware of the constraints that working for high street retailers imposes on them, namely that they have to design economically successful garments that are perceived as being appealing to their company's target customer group. Despite these constraints on their creativity designers also emphasised that they evaluate fashion

trends, colours and garments from an aesthetic perspective and that they regard themselves and their work as creative and innovative – at least to a certain degree. Interviewees tended to contrast their own outlook with that of other key players. Thus, designers emphasised that they were driven more by aesthetic considerations, while buyers and merchandisers described their outlook as being more commercially motivated. In order to illustrate this important point, quotes from interviewees from all three categories and occupational groups have been chosen.

*Faye:* ... [the buyers are] much more: do the quickest, cheapest thing possible. Whereas we will ... probably be less commercial and try and hang out for the right look ... it's trying to strike that balance ... we're always much more image conscious really, and they're obviously much more price conscious ... they'll want to sell what they know [will sell] and it's our job to move them forward really ... to be there pushing them forward all the time.

(Design Manager, buying/design-led retailer)

*Zoë:* So if they've [the buyers] got ten 10 options ... and they've got 20 things to choose from, they'll choose the most commercial ones ... Whereas sometimes we are likely to say 'But that is so much nicer!'

*May:* ...they've got more of a commercial eye, perhaps, sometimes. Whereas we are thinking of the trends and the themes ...

(Designers, buying-led retailer)

*Leah:* [I am] looking at a range from a more commercial point of view [...] and [the designers] are the ones saying that this is what they feel is really important in terms of trend and I then have to be the commercial eye. [...] That is my role! To be the commercial eye. [Whereas] at the end of the day, a designer has to be the design/directional forward eye.

(Buying Director, design-led retailer)

*Sean:* ...being from merchandising ... I'll look at something as purely, is it going to sell? Yes or no. How much will it sell? Will it get me more than 75 percent sell-through. If not, I always challenge it [...] it's our job to be more commercial ... and their [the buyers'] ...job is to be very commercial, but with much more of an eye for the right product. They can go and get the right product, we are just going to try to make that product work as hard as possible for us ... you can say that the standpoint is slightly different. [...] I always ... try to be as commercial as possible, so that [from] the space that we have we get as much money out as we can.

(Assistant Merchandiser, buying/design-led retailer)

The above statements show that (a) there are marked differences in the rationales of key players, i.e. the 'conventions' that govern the various subworlds, which depend on their membership of an occupational group and not their companies' organisational set-up, and (b) that the division of labour in high street womenswear retailers' selection processes follows along an aesthetic/commercial

axis, with the designers occupying one end, the aesthetic/creative one, and the buyers/merchandisers occupying the other, commercially motivated, outlook. This definition of the differences in key players' rationales is shared by all occupational groups in the sample and, indeed, is positively encouraged by companies, as the following quotes demonstrate:

*Sophia:* ... here we are relatively commercial, but we are not encouraged to be too commercial, because your buyer is paid to be commercial. That is their principal role ...

*Susanne:* So not being too commercial is something that is encouraged?

*Sophia:* Yeah ... the garment director said, you know 'There is no point having a design team if they are as commercial as the buyer, because the buyer could go out and buy the range, if it's that commercial.' You have to inspire ...

*(Designer, design-led retailer)*

*Lisa:* [The designers] can be really commercial, but ... the company ... want[s] them to be the most fashion forward people, giving us what nobody else on the high street has got.

*(Assistant Buyer, buying/design-led retailer)*

The paradigm of 'not being too commercial' is further distilled into designers' work by excluding them from one central area of fashion retailing: 'the money side of things' (Sarah). Not surprisingly therefore, designers are sometimes criticised for being too 'uncommercial' and unrealistic in their designs. While Anne, the fashion director of a large design-led group, argues that excluding designers from the commercial side of the business is problematic, Vivian, who is a supply-based designer and hence more involved in garment costing, etc. views the exclusion of retail-based designers from commercial considerations far more positively.

*Anne:* ... nobody in the high street wants to let the designers know anymore than just 'Draw me some nice pictures, draw me some interesting designs' ... the buyer goes off and negotiates the price, the deliveries and does all the commercial business. ... [but] if you don't know that what you are doing on your sketch by adding that fabric is adding 30 percent of the cost, if nobody tells them that how are they supposed to know?! They are not taught that properly in colleges ... So there is this conflict. But here I don't treat them like that anyway. They've got to be commercial, they've got to learn.

*(Fashion Director, group of design-led retailers)*

*Vivian:* ... the main criticism that you hear about the design department in M & S is that their function is kind of slightly unrealistic ... They're just effectively sketching ... They have no concept of ... how the details that they put into a garment generate costing complications. But then I think that's a good thing. I think it's important for design to have ... their ideal ...

*(Design Executive, buying/design-led manufacturer)*

It is debatable how much this exclusion of designers from, what can be called, non-creative pursuits is down to designers' sense of self-identity. McRobbie (1998), for example, suggests that fashion education is largely responsible for creating a division between the artistic/creative and the manufacturing side of fashion. McRobbie (1998: 38) argues that fashion academics seek to elevate the status of fashion design in art schools by 'sharply differentiating fashion design from technology, production and manufacture.' In order to ward off any associations with the rag trade a division between image-making and garment-making is made, i.e. between those who sketch and those of sew. Fashion design's connection to fine art rather than the clothing industry is established by downgrading production related activities, such as sewing. These become a 'key distinguishing feature ... Not being able to sew is a matter of pride!' (McRobbie, 1998: 38). As a consequence, production related issues become marginalized in the fashion design curriculum 'so, in a sense, right from the start there is a quite rigid division of labour.' (McRobbie, 1998: 60). It is conceivable that the separation of fashion design from the industry which produces and manufactures the actual garments influences design students' self-perception and may give rise to the 'aesthetic/creative' outlook expressed by the designers in the sample. Thus, the aesthetic - commercial division of labour between the key players in this study may be reinforced by designers' own evaluation of which tasks they ought to be involved in themselves and which they ought to delegate to others. However since commerciality, more so than pure creativity, is essential in highly competitive industries such as fashion retailing, being largely excluded from the commercial and production related dimensions of the decision making process reinforces the (im-) balance of power between designers and buyers. Indeed McRobbie (1998) points out that the imbalance of power in the fashion industry as a whole is perpetually reproduced by separating fashion design from fashion production. This not only leaves designers in a weakened position, but is also of disadvantage 'for the largely female workforce concentrated in production ... [because] it simply confirms their low status ... [and mains] divisions of social class and ethnicity.' (McRobbie, 1998: 39).

In addition, the division of labour on the high street womenswear level into 'aesthetic' and 'commercial' gives rise to certain areas of conflict that are experienced by key players across all three retailer categories. One of those areas of conflict relates to what can be termed the issue of 'repeating bestsellers' versus 'moving the range on'. Merchandisers and buyers often use previous seasons' sales data to assess the commerciality of certain colours and styles and, based on the positive outcome of this analysis, may decide to repeat a certain garment or to do an

updated version of it. This can create tensions between the designers, on the one hand, and the merchandisers and buyers, on the other. Designers, for instance, may not be interested, or may indeed see little merit, in reworking old garments and may instead prefer to move the range on. Moreover, a negative evaluation of a certain colour or style based on past sales' data may inhibit designers from running an updated version of the garment in a future season. Thus, some designers have expressed their frustration over merchandisers and buyers' insensitivity in terms of fashion since they feel that due to the continuous changes in fashion, past performances are an arbitrary measure for future success. Sarah's observation is a compelling example of this kind of clash in outlooks between designers and merchandisers.

*Sarah: ... the merchandising director ... looks at past sales and has got an influence on the range, because if you are doing a sleeveless dress in velvet that didn't sell last season you haven't got a hope in hell's chance of getting it in this season. [...] I find [it] very dangerous actually, because somebody who hasn't got a background in design looks at things completely different to somebody who has got the background ... because they [the merchandisers] haven't got a design eye they see it as the same ... to them it's just [the same] and it didn't sell ... but this is the new trend ... they don't see it like that ... it can become quite heated at times ...*  
*(Designer, design-led retailer)*

Basing design decisions on the commercial assessment of sales data not only causes tensions between the key occupational groups, but may hamper designers' ability to move the collection forward, because the pressure to produce commercial successes may stifle the designers' ability to look at their designs from a creative point of view and hence result in a certain stagnation of future ranges. Very similar points have been made by Crane (1992) and Robinson (1999), who assert that cultural production can become stagnant if the desire to build on previous successes stands in the way of innovation. Robinson (1999: 17), for instance, warns that the line between achieving customer satisfaction by responding to their wishes and stifling design innovations is a narrow one. Retailers need to strike a balance between listening to their customers and developing their clothing ranges independently of consumers' wishes. Thus, at one and the same time retailers have to negotiate the problems associated with being too customer-led, i.e. product-sameness, and alienating customers by not giving them what they want.

Interestingly, concerns about the usefulness of providing designers with information on past sales is expressed not only by designers, such as Sarah, but also

by Tanya, the merchandise controller/buyer of the most strongly design-led company in the sample.

*Sarah:* ... we have got information at our fingertips really, if we want ... but ... it's better not to know sometimes, it's better just to get on with what you really want to do, because if you think too much about what's selling what's not selling, you often can't actually get on and do your job, because you are bogged down with thinking 'Oh, maybe I shouldn't be doing this or that didn't sell.' But you are better doing what you think and then, you know, you'll soon find out if it's not going to go through (laughs) ...  
(*Designer, design-led retailer*)

*Tanya:* ... we give them [our analysis of past sales, what we call] ... 'lessons learned' ... because we are design-led I think they [the designers] feel that what's in the past is in the past, we need to move the brand on, we can't just hanker back to old styles that worked, we need to think of new [things] to entice customers and to keep the brand fresh and exciting ... they [the designers] talk about 'dumbing down' [the range] very much, because we [the buyers] always go back to the very basic black suit ... but that's what sells.  
(*UK Merchandise Controller/Buyer, design-led retailer*)

Thus, designers are exposed to contradictory tensions within companies. On the one hand, (some) designers are given buying grids or design briefs and reports of past sales which will influence their design decisions to a certain extent, i.e. they are expected to take commercial considerations into account and be 'excellent commercial designer[s]' – a description Tim uses to characterise his company's main designer; on the other hand, designers are clearly given the 'responsibility to have the vision ... creatively' (Leah) that will direct the company.

However, it is not only designers who have to reconcile creativity with commerciality to some extent, but also the buyers who are dealing with the product. Kim, for instance, argues that conflicts in the product selection process in her company mainly arise between herself and the merchandise department, not the buying director whom she characterises as 'very product-driven'. This is significant because the data suggest that buyers have what Hirsch (1972) calls 'a boundary spanning occupation'; they need to be both commercially motivated and fashion aware.<sup>11</sup> They thus provide the link between the designers on the creative side and the merchandisers on the purely commercial one. This implies that buyers present their 'commercial face' to the designers, i.e. reining in designers' more extravagant designs and moulding them into a commercial range, while showing their 'product face' to the merchandisers, i.e. pushing them for money to manufacture garments that merchandisers perceive as being too risky. The buyer–merchandiser dynamic is well illustrated by the following quote:

*Sean:* ... we do manage our core product very carefully ... that's more my side of things, I get more involved in ... making sure that the core is correct ... the buyers will take care of the styling and move the product on and make sure, you know, the colours are right ... I'll make sure that the quantities they are buying are right to match up with the sales that we believe we can make.

*(Assistant Merchandiser, buying/design-led retailer)*

It is interesting to note that Sean describes one of the buyers' tasks as 'moving the product on', since Faye (see p. 250) used more or less the same expression when she described designers' efforts to present buyers with new products. Indeed, some of the buyers in the sample described the position in their company as one of 'being in the middle', i.e. as linking design and merchandising. Examples of this are Francis and Lisa's descriptions of their roles. While Francis discusses the differences between designers and buyers when doing forecasting, Lisa looks at the buyers' position in the selection process in relation to that of the designers and merchandisers.

*Francis:* ... [the designers] are very design-led and I am very commercial, I cross over between the two, because I look after our retail stores, so I have to see products that can sell. [...] they do predict from a very design level and I'll predict from a mixture of both, from commercial and design, cause we have to maximise our sales.

*(Buyer, design-led retailer)*

*Lisa:* ... the designers are getting their opinion, but the buyers make the decisions ... and the buyers are the link between merchandisers ... I suppose they are the kind of in-between. Yeah, in-between them ...

*(Assistant Buyer, buying/design-led retailer)*

We have thus established that although hierarchical structures do exist the selection process in general is based on the interplay between teamwork and conflicts. This clearly contradicts Hirsch's (1972) notion of the non-conflictual, unidirectional nature of gate-keeping systems within culture industries, as well as his notion of 'raw materials' which lies at the very heart of it. Nonetheless, the data suggest that the selection process in womenswear retailers has two affinities with Hirsch's model. First, the division between the primary and secondary level of selection resembles Hirsch's technical and managerial subsystems because, similar to these subsystems, the data show that there is a definite split between the 'proposing of cultural innovations', i.e. the aesthetic/creative role occupied by designers, and the 'selection of actual proposals for production', which relates to the commercial dimension for which buyers and, to a lesser extent, merchandisers are responsible. The second similarity to Hirsch's model lies in the existence of 'boundary spanning'

occupations in the realm of womenswear retailing which, as we have seen, are occupied by fashion buyers whose role is to unite product- and commercially-motivated decisions.

Having demonstrated that the selection process oscillates between teamwork and conflict, we now need to find out what makes practitioners coordinate their activities and what helps them to overcome potential areas of conflicts.

## 6.5 The Ordering Principle

As outlined in the previous chapter, retailers aim to align their level of fashion forwardness with that of their perceived target customer group. It can be argued that the perceived customer image not only influences retailers' ranges in terms of their fashion level, but that assumptions about their customers guide key players throughout all stages of the selection process. Consequently, social actors' customer image can be seen as the ordering principle that guides their decision-making processes. The notion of the ordering principle serves a similar function to Shibutani's (1955: 563) use of the concept of 'reference group', which he defines as a 'group whose perspective constitutes the frame of reference of the actor'. Applied within the context of this study, the ordering principle provides individuals within a company, as well as the company's supplier base, with an overarching frame of reference, in this case an image of their core customer. The notion of the ordering principle has also some affinities to Becker's (1982) description of the role of conventions within art worlds. While the occupational subworlds of designers, buyers and merchandisers are governed by internal conventions, i.e. 'aesthetic/creative' or 'commercial' ones, the customer image is like an overarching convention which helps key players from different occupational groups to coordinate their activities in a meaningful way.

Following the assumption that the ordering principle that governs production relations in competitive, consumer-driven environments is a shared image of the target customer group, interviewees were asked to describe their customers. It was striking that all (retail-based) interviewees, despite the differences in occupational roles, have a very clear-cut image of their target customers.<sup>12</sup> In fact, all respondents stated that 'knowing your customer' is very important. Zoë and Sarah's statements are a good example of this:

*Zoë: ... we know our customer ... the whole team is getting more and more focused on who our customer is, where [the company] is going ... buying, merchandising, design – everything.  
(Designer, buying-led retailer)*

*Sarah:* ... we have got a certain image of our lady and who she is ... We've got such a lot of data from our own shops [and] surveys and things that have been done. ... we have to know to design towards that.

*(Designer, design-led retailer)*

The knowledge of their customer goes beyond basic information on age, income level and fashion forwardness and often includes assumptions on the women's marital status and whether or not they have children. Eric and Tim's design-led company, for example, has given names to their two target groups ('life managers' and 'quality seekers'), which, according to Leah, is not at all unusual because:

*Leah:* To be a high street retailer, who has to be commercial, you have to understand the market and you have to understand that woman who is coming into your stores. Most companies will actually have a name for her and visualise her ... you have to! ...that's all part of the commerciality, you have to envisage ... what does she want to wear? Why does she want to wear it? ... Why might she not wear it?

*(Buying Director, design-led retailer)*

Not surprisingly, many respondents stated that their company invests in market research to get the customer profile right. Of course, another universally used technique for understanding customers' preferences is the analysis of sales data. In Hirsch's (1972), for example, also recognised the influence of sales figures on the future production of cultural artefacts. In his model this is the only time when customers' tastes and preferences influence the production of cultural goods. However, as shown in the remainder of this chapter, key players are guided by their perceived customer image at all stages during the selection process and not only when sale figures are analysed. Moreover, as we have seen, designers may choose not to look at the figures, yet they are nonetheless influenced by what they believe customers will or will not like. The data hence suggest that the analysis of past sales is only one of the methods employed by industry practitioners to gather information about their customer. Tim, for instance, argues that it is a combination of the detailed analysis of sales data and comprehensive customer profiling which promises success.

*Tim:* Retail is detail ... it's all about analysing the figures in depth and also analysing your customers in depth and that goes down to ... what they do, how much money do they make, what do they like to go and see in the theatre ... what sizes they are ... it is actually quite complex, but ... basically you start with your customer. Okay, we are very clear on who our customer is and everyone in this company can walk down the high street and go 'There she, there she is, there she is ...'

*(Buying Director, design-led retailer)*

In addition, Alicia reported that her company not only relies on information from secondary sources to attune its workers to the key customer groups but has devised a scheme to send head-office personnel to work in the shops to gain non-mediated insights into what customers do and do not like. In this way, head-office staff are able to interact more directly with customers than they would by simply visiting shops, a practice which is nonetheless adhered to regularly. Alicia clearly believed that getting first-hand accounts by talking to and observing customers was a valuable experience because:

*Alicia: ... you were getting a commercial view and sometimes our views are slightly wrong ... I think sometimes you can let ... [it] slip. You kind of build in your head what you think the customer should be and it isn't necessarily always right, so it's very good to just pull yourself back in line a bit before you go off on a tangent.  
(Buyer, buying/design-led retailer)*

Alicia's choice of words ('pull yourself back in line') is significant because it emphasises the fact that she uses her interpretation of the target customer image to direct her decisions. Relating this to our previous observations regarding the importance of commerciality in buyers' decision-making process, we could argue that the perceived customer image forms the basis of key players' assessments of the commerciality of products. Indeed, Arcadia's 2004 job advertisement campaign suggests that understanding the customer lies at the very heart of their definition of what makes a good buyer: 'Understanding our customer, anticipating what will be hanging in their wardrobe months ahead and making sure we deliver it to them, is what buying is all about.'. This is closely echoed in Anne and Tim's statements below who put economic success in direct correlation with customer satisfaction - which of course can only be achieved if one has a good understanding of what one's customers will like.

*Anne: It's very very important that you are very clear on who your customer is and that you are very clear on what pleases her and what displeases her. You know, because at the end of the day we are a commercial operation, you know, we only exist if we are successful and we are only successful if we give the customer what she wants ... I think the people that fail are the people that stop listening to their customers [...] the designers have got to ... keep the customer in their mind all the time. That's the most critical thing [...] the customer is not loyal unless you are giving her something she wants and even the mighty Marks & Spencer can't exist if it doesn't supply what the customer wants ...  
(Fashion Director, group of design-led retailers)*

*Tim: ... any retailer must know their customer and that is absolutely key and you must continue to actually provide a product which that customer wants*

and that's basically retailing pure and simple. And I think as long as any retailer does that they will survive but ... if they ignore it, it will be at their peril.

*(Buying Director, design-led retailer)*

At the time of conducting the interviews, Marks & Spencer's downfall was sending shock waves through the industry and many respondents were using this company's demise as an example of what happens to retailers who have stopped listening to, or have lost touch with, their customer base and have therefore alienated their core customers. One reason why respondents may have repeatedly emphasised the importance of 'knowing your customer' throughout the interviews may be related to these dramatic events since they might have transformed interviewees' tacit awareness of the importance of this knowledge.

At another level today's consumers are said to be more fashion 'educated' and believed to possess a clearer idea of what they are looking for; retailers subsequently need to strive to provide customers with the desired product (Robinson, 1999). Thus, customers may be perceived as more discerning and not as easily persuaded into buying garments they do not like. This statement is supported by the many examples of retailers who 'got it wrong' and had to mark-down great proportions of their ranges at the end of the season. In fact, Marks & Spencer's downfall was triggered by such a situation. As seen in Chapter 3, changes in consumers' expectations are to a large extent due to consumers' ability to access a wider range of information channels which offer quick updates on the latest trends and fashions from all around the world. As Robinson (1999) points out:

With fashion such an essential and individual choice, marketers can never assume passive recipients of their messages and with growing choice and media awareness, power has shifted even further towards the consumer. Against this background designers, buyers and marketers need to constantly monitor consumer taste as it can outpace them ... (Robinson, 1999: 6)

Thus, in spite of designers' greater emphasis on aesthetic/creative considerations, just like the buyers and merchandisers, they have to fine-tune their work to reflect customers' preferences and, as Faye points out, even aspirations:

*Faye:* I totally design for the customer in mind ... we just know who she is. I mean, we know if she had a lot more money she'd buy Karen Millen. It's knowing who she would be ... we even scale our customer up ... if she had more disposable income where would she be? And then we use that as the inspiration ...

*(Design Manager, buying/design-led retailer)*

Following these observations, it could be argued that the overriding consideration in key players' decision-making processes at both selection levels is whether or not their choice of colours, styles, fabrics and complete garments will meet with the approval of their customers - concrete examples of how the perceived target customer image is applied at the various levels are discussed in the last section of this chapter. The extent to which interviewees maintain the perceived customer image influences (and indeed motivates) their decisions at the forecasting and selection stages was also revealed when they were asked to compare the level of influence that 'personal taste', 'product/company image' and 'target customer image' have on their work.

Personal taste, product/company image and target customer image can all be seen as examples of 'reference groups'. Cantor (1971: 172), for example, shows that TV producers use their own taste as a 'yardstick' for assessing programmes and hence 'thought of themselves as their reference audience'. Similarly, in his discussion of journalists' decision-making processes, Gans (1980: 237) argues that journalists see themselves as 'representatives of the audience' who assess the potential impact of a story on their audience based on whether or not they themselves were 'grabbed' by it.<sup>13</sup> In contrast, the fashion workers interviewed for this research discounted personal taste as a basis for their decision making, although some interviewees conceded that personal taste has some influence on their work. Sarah for example, a designer for a design-led retailer, said that her colleagues joke about the fact that she is a 'green person' while another designer within the team 'always goes for purples and lilacs'. Nonetheless, it is very clear from the data that personal taste has, at the most, a minor influence on key players' decisions. Indeed, Sarah herself pointed out that the most important thing when starting a new collection is 'having the customer in mind ... you've got to just keep focused on the customer and what colours you think she would wear and that is number one, how you start'. Other respondents made it very clear that their selection decisions were not based on personal taste by distancing themselves from the products:

*Kate: I think one important thing you have to bear in mind with the buying and the designing is to try and not to put your own taste into it. I like really pretty, colourful things, but that's not really our customer necessarily ... it is trying to sort of get yourself focused onto the customer and what they buy ... some things we buy I think are horrible, but they're selling! ... sometimes we have to buy tart, clubby dresses, no one likes it, we don't really want to buy it, but it sells. So it is very much a case of knowing ... your customer and sometimes you do have to buy things which you are not that keen on.*

*(Designer/Trend Co-ordinator, buying-led retailer)*

It is interesting that the way in which fashion workers draw a distinction between their own taste and that of their customers is reminiscent of Radway's (1997) discussion of editors' book selection processes at the Book-of-the-Month club. Radway (1997: 61) shows how editors differentiate between their 'personal taste for high literary fiction and the more tolerant taste ... [they] exercised institutionally on behalf of the club'.

Similarly, and contrary to Ryan and Peterson's (1982) assumptions discussed in Chapter 1, the product/company image also played a rather marginal role in the decision-making processes of designers, buyers and merchandisers. Only five interviewees – Anne, Francis, Sarah, Sean and Tanya – argued that company image plays some role in their decisions. Interestingly, all but Sean belong to design-led companies. This confirms the earlier argument regarding design-led companies' emphasis on a clear and unique design image that is stronger in this category of retailers than in the others. Nevertheless, product/company image is not the decisive factor in these key players' selection choices as can be seen from Anne and Francis's statements:

*Anne:* I think we do have a very coherent offering, I hope it is, because if it is not coherent you won't be successful. So each brand is very coherent towards their customer, it's very tight within that, that focus on who the customer is ...

*(Fashion Director, group of design-led retailers)*

*Francis:* You have to maintain the company's image, but then obviously I am buying for customers and I've got to ... buy what I think people will buy themselves. So that's really my target ... I have to think what's commercial, what's going to sell.

*(Buyer, design-led retailers)*

Since all respondents reject personal taste and product/company image as the decisive forces influencing key players' selections at all levels, it is not surprising that they emphasise the necessity of pleasing prospective customers and argue that their perceived customer image guides their decision making process. This is for example seen in the comments of Tim, Alicia and Zoë/May, who were chosen to represent the three retailer categories:

*Susanne:* What motivates your decisions? Are they based on your own taste?

*Tim:* Absolutely not! That would be a disaster ... (laughs) ...

*Susanne:* Are they customer driven ... ?

*Tim:* Oh, absolutely! One hundred percent ...

*(Buying Director, design-led retailer)*

*Alicia:* ... the customer always comes first ... what we think they want kind of thing. And we pretty much have a good idea. Sometimes we don't understand why they don't like it, but ... more often than not they like it.  
(*Buyer, buying/design-led retailer*)

*May and Zoë:* ... we know our customer ...

*May:* ... we think about our customer ... We see things that we absolutely love, but we know our customer would never ever dream of wearing it. Or wouldn't even understand it!  
(*Designers, buying-led retailer*)

The evidence that key players use the perceived target customer image as a basis for their decision-making processes at the forecasting and selection stage is a strong indicator that the customer image serves as an ordering principle which helps to streamline key players' efforts and to smooth over differences in occupational outlooks. Indeed, there are some suggestions that the audience image plays a similar role in TV production.<sup>14</sup> Gripsrud (1995 in Hagen, 1999: 132), for example, points out that the commercial success of Hollywood productions is related to media personnel's orientation to the likes and dislike of their anticipated audience. This stance can also be seen in Espinosa's (1982 in Ang, 1991: 19) account of the impact of the imagined audience on the production process of commercial TV stations in the US can be seen in 'story conferences'. Story conferences are meetings in which the creative personnel of a TV station come together to decide on the content and shape of the programme they are creating. In the course of these story conferences members bring their perceptions of the audience's educational level, world view, expectations of a programme, etc. to bear on their choices. Thus, the 'perceptions of the audience function as an internalised, restraining mechanism which [the producers] bring into play at appropriate moments in the story conference' (Espinosa, 1982: 84 in Ang, 1991: 20). It is interesting to note how closely Espinosa's description of the audience image as a 'restraining mechanism' echoes Alicia's account of how images of the target customer help practitioners to 'pull themselves back into line'.

The influence practitioners' perceptions of the target audience has on their working practices can also be seen in Radway's (1997) study of the Book-of-the-Month Club. Radway shows that the Club's editors and judges read manuscripts 'on behave' of their subscribers, i.e. that they suspend their own literary preferences in order to assess the books before them in terms of whether or not they are capable of fulfilling the expectations of the 'general reader'.<sup>15</sup> Radway (1997: 271) maintains that editors and judges 'tried not to dictate on the basis of their own taste but sought to imagine themselves as the readers they aimed to address. Only after they had

managed that act of imagination and identification did they turn to the monthly output of the publishing industry and seek particular books for particular readers'. Thus, we can see that the editors and judges at the Book-of-the-Month Club evoke the image of the 'general reader' to justify their selection or rejection of manuscripts.

Despite the similar role of the customer and the subscriber image it is interesting to note that, contrary to fashion practitioners, editors and judges do not base their imagination of the reading behaviour of subscribers on factual evidence. Although the Book-of-the-Month Club undertook research into subscribers' book buying practices they did not investigate subscribers' reading behaviour. Instead editors and judges seem to assume that their own reading of a manuscript is a valid substitute or measuring rod for their subscribers' reading behaviour (Radway, 1997: 41). The absence of factual knowledge of the audience is also noted by Espinosa (1982: 85 in Ang, 1991: 20) who states that TV personnel's images of the audience are not based on empirical evidence, but 'are the subjective, intuitive beliefs of producers'.

However, as Alicia's statement on the previous page indicates, even a customer image that is anchored in factual evidence of women's clothes buying behaviour does not guarantee that practitioners' predictions and selections are always accurate. This view is echoed by Tanya who says that 'we always have a picture of what we think she is and then it's never quite [laughs] what she's like.' Indeed, the majority of interviewees maintained that there is always an element of unpredictability and that each season there will be some garments that will sell better or worse than predicted. This is reminiscent of Cantor's (1971: 170) study, who found that TV producers were often surprised to find that their predictions what the audience will and will not like were false. For example, shows that were aimed at a certain audience sometimes attracted viewers from other demographic groups. Since producers try to predict the success of a particular programme by speculating on what kind of audience it will attract, these failures to accurately forecast who will and will not watch the show are similar to the inability of fashion workers to assess customer's responses to garments with absolute certainty.<sup>16</sup>

However, while interviewees seem to find it 'puzzling' that some garments are perceived differently by their customers than by themselves, this element of uncertainty is taken-for-granted within the industry and did not seem to worry interviewees. What is more, it does not make them question their reliance on consumer research, sales data analysis or their own presumption of their target customer group nor doubt their accuracy. Anne's quote highlights an interesting

contradiction inherent in a commonly used strategy by which fashion practitioners aim to understand past sales:

*Anne: ... we have regular what we call 'Best and Worst' meetings ... I think that is quite general throughout the trade ... We have 'Best and Worst' every month on the previous month sales so everything will be racked up and then we will look at what speed it sold at, what its average sell-through rate was, whether it was successful or not successful and then, you know, I really make sure that the designers and buyers understand why she [the customer] liked this and why she hated that. Which can be for multiple reasons ...  
(Fashion Director, group of design-led retailer)*

What is interesting in Anne's explanation of retailers' sale analysis is the inherent belief that, once the sale print-outs are there, it is possible for retailers to analyse exactly why customers have liked or disliked certain garments. This, of course, supports the question of why practitioners were not able to spot the best and worse sellers during the selection process.

Despite using extensive market research to get the customer profile right and, in spite of using a detailed analysis of sales data, practitioners do not always succeed in accurately reading customers' preferences. There remains an element of uncertainty of which respondents are keenly aware and which they seek to minimise by applying their knowledge of the customers at the various filtering stages at the primary and secondary level.

## **6.6 The Application Of The Ordering Principle**

### **6.6.1 The filtering stages at the primary selection level**

As outlined earlier, designers' main task during the forecasting stage is to collect colour and trend information from a vast pool of inspirational sources, from which they will then compile colour palettes and storyboards. While this stage in the selection process is reminiscent of Hirsch's (1972) surplus of 'raw materials' at the technical level of the production system, it is important to remember that this kind of input is by no means raw, i.e. unmediated, but that it has already passed a number of selection stages before reaching this particular point in the process.<sup>17</sup> A good example of this is the selection processes of colours.

As previously discussed, colours undergo some form of pre-selection when they are presented to the International Colour Authority, whose members select about 30 colours for their colour report. These colours are then taken up and reworked by the textile mills whose products designers and buyers will see at the various trade shows. In this way, only those colours that have successfully passed through these initial filtering stages are available for selection by high street

designers, who then process the trend information in order to narrow it down to those colours they believe are suitable for their specific target customer group. This process involves two interconnected stages: (i) designers have to determine which colours are going to be the trend colours for the season that will give an up-to-date feel to the collection; and (ii) based on their assessment about their customers' colours preferences and dislikes designers need to decide which colours they can run from a commercial point of view. These two levels of the colour selection process reflect once again the conflicting forces of aesthetically/creatively motivated decisions, namely in the form of deciding which colours are the strongest or most exciting ones for the next season, while at the same time having to choose safe colours – colours that are known to be selling well. There are many examples in the data that describe the colour selection process and throw light on the considerations behind designers' decision-making at this stage. The following quote taken from the interview with Faye, for instance, illustrates how designers initially approach the material collected from various prediction companies and other sources of trend information.

*Faye: ... we put all the colours ... from all the prediction companies on the board ... in their tones, so all the yellows together, all the blues, all the reds and so on. And we will look at the whole thing and say 'Oh, there is not much blue this season, or there is a lot of blue coming back.' And you can see it as an overall picture ... you are averaging it out basically. So you can see that the overriding trend from all the colour prediction services is that it is heavily pink or it's heavily blue or whatever. ... from that you then narrow it down ... till you choose the particular shades that you want.*  
*(Design Manager, buying-design-led retailer)*

Once designers have decided on the trend colours for the season, the initial colour palette is assessed in terms of its commerciality. This is the stage at which designers apply their knowledge of their customers' colour preferences and mould their colour selection accordingly. This can take the form of choosing or rejecting certain colours, as well as changing the shade of a colour to make it more appropriate for their customer:

*Sophia: ... you then look at certain colours and you think 'It's commercial to have white, it's commercial to have a nice pale blue ...'*  
*Rita: ... we might look at that colour and think 'Oh, that's nice but it's not really our customer, let's, you know, change it slightly ...'*  
*(Designer, design-led retailer)*

*Tanya: ... it's important that we consider what the British customer really wants and make sure that we are getting a sort of marriage of what is*

appropriate fashionwise [with] what's going to work for us in the stores [...] there're certain colours ... that don't work for the British skin ...  
(UK Merchandise Controller/Buyer, design-led retailer)

*Kate:* ... certain colours don't sell as well ... green doesn't sell as well, bright yellow, bright orange, all the neons ... safe colours like camel, stone, black, white ... we sell lilac very well ...  
(Designer/Trend Co-ordinator, buying-led retailer)

*Kim:* ... your main ranges will be built around ... core colours ... black and white, sky and pink ... are almost core in the ladies now [...] we do always try all the fashion colours, but it's always black and white that do best.  
(Product Developer/Buyer, buying-led retailer)

Rita and Tanya's statements make direct reference to their customers, while Sophia, Kate and Kim's accounts clearly show that they have a good knowledge of which colours are commercial and which are not. The assessment of colours' commerciality of course implies, as we have already seen, a knowledge of customers' preferences and a willingness to take them into account. It is by no means only in the selection of colours that designers apply their perceived customer image; fashion trends are also considered as to their suitability for the target customers.

*May:* ... we sort of split it down, what we think the strongest looks are ... how commercial they are ... a lot of the ... catwalk [trends] ... are not right for our customer. We have to sort of translate it. Obviously we know our customer, she is very feminine, so the harder edge stuff is not really [for her] ... But that is obviously all about knowing your customer, isn't it really ...?  
(Designer, buying-led retailer)

Once again, it is clear that assumptions about customers' fashion forwardness and their likeliness to wear certain styles guide designers' decisions. However, those trends that pass the initial scrutiny and are deemed suitable for the company's target customers, cannot be taken directly from the catwalks but undergo adaptations until designers are satisfied that they have been successfully translated into an appropriate version for their customers. During this process designers use 'storyboards', which are made up from sample garments, sketches, magazine pictures, fabric swatches and key colours they feel relate to a particular theme or story. May and Zoë describe the initial storyboards as 'thought bubbles', while Faye sees the finished storyboards as frameworks for buyers. Once more there is a process of selection and modification involved before stories are agreed upon and passed on to the buyers.

*May:* ... big boards of everything that we think is really strong and we've just put it up all around us ...

*Zoë:* ... it's almost like thoughts, your thoughts ...

*May:* ... thought processes and bubbles that you think are really strong... yeah ... and then from that you sort of take out what you think are the key things and for what sort of period.

*(Designer, buying-led retailer)*

*Faye:* We ... put together ... storyboards and themes into which the buyers will buy ... we create the look and the feel and the ambience. We buy the samples on our shopping trips that give the flavour of the range ... and we then convey this information on to the buyers so that they then have a framework within which to buy each season from a point of view of colour and story and feel [...] sometimes a story comes together very, very quickly and very easily and it'll just pretty much stay as it was when it first got thrown on the wall. Other times, it'll ... completely change personality by the time it comes through ...

*(Design Manger, buying/design-led retailer)*

In addition to influencing designers' selection of colours and trends, the perceived target customer image also influences their choice of fabrics and styles. The best example of this is Sarah's company which caters for the more upmarket older woman and specialises in occasion wear. As the previous chapter has shown, catering for older customers may pose more restrictions on what retailers can offer. For example Anne, the fashion director for a group of design-led retailers, points out that older women are more set in their clothing preferences and less open to experiment, i.e. to adopt different images with changing fashion. It is hence not surprising that this customer group seems to have stronger expectations of the styling and fabrication of garments. How customers' preferences influences retailers' selection of fabrics, for example, can be seen in Sarah's statement:

*Sarah:* ... our lady hates creasing ... Our garments can't crease ... They've got to be bullet proof in fact. So, the fabrication of our range is a major, major part of it. More so even than the design element, because ... we can have the nicest dress and jacket in the world, but if ... it creases she'll never come back to us again ... That's why we use a lot of synthetic fabrics, polyester ... We cannot use Viscose, Viscose is like a naughty word in this company. Viscose is just a big no-no because it creases ... We've got major problems trying to make the range look new, because we've got such restrictions on fabrics [...] fabric I would say is one of our main restrictions

...

*(Designer, design-led retailer)*

These observations show that the designers' image of their target customer group is of great importance both on the manufacturing and the retailing level, because it enables designers to select colours, trends, sample garments, and so on that they believe to be (commercially) successful or to modify them in a way they hope will make them acceptable for their target customer group. This insight into

designers' decision-making processes once again contradicts Hirsch analysis, for he believed that proposals either pass or fail at a filtering stage. The following section demonstrates that the perceived customer image also plays a significant role in the assessment and modification of garments at the secondary selection level.

### 6.6.2 The filtering stages at the secondary selection level

Selection at the secondary level is entirely product-based and hence involves the assessment of sample garments, both those that have been created in-house as well as suppliers' samples. Depending on companies' sampling policy, i.e. whether or not companies pay for their samples themselves or pass on the costs to suppliers, the ratio between the number of sample garments and the final number of garments that make up a range can vary significantly. As Anne points out, companies who 'buy from themselves', i.e. who use a large percentage of in-house designs instead of suppliers' samples, have to be more focused during the sampling stage and only sample those garments that they feel particularly strongly about.<sup>18</sup>

*Anne: ... you might have 40 ... options in a month from your own design and if you do three for one that's 120 garments to look through and everything would be put on a model and looked at and then you select your 40 from that [...] whereas [if you] buy from an outside supplier ... [if the buyer] goes to 4 or 5 suppliers they can all have over a hundred samples, she might in a day see 500 samples to select what she needs. [If we buy from ourselves we] have to be more focus and more specific about what we want ... we're paying for our own sampling, our own pattern room and all the rest of it, so it's ... cost pressures as well.*

*(Fashion Director, group of design-led retailers)*

It is not surprising to find that Anne's company, since it carries its own sampling cost, has a smaller sampling ratio than Lisa's company which, on the other hand, passes the sampling costs on to their suppliers.

*Lisa: Maybe two in ten. One fifth of all the garments sampled we'll buy. Even if we only buy a small quantity. And that varies as well from suppliers, 'cause some suppliers we'll take everything they do, other suppliers we'll take one in about 50, so it just depends.*

*(Assistant Buyer, buying/design-led retailer)*

From the above quotes we can see that that Anne's company makes 3 samples for each garment that is finally chosen, while Lisa's company looks at 5 manufacturer's samples per final garment. This means that the sampling ratio is 3:1 in Anne's company and 5:1 in Lisa's. To keep production costs down Sophia's

company, for example, has introduced a policy that minimised its relatively low sampling ratio of approximately 2:1 even further.

*Sophia:* ... we have a company policy now not to do very much ... we used to [do] 40–50 percent more samples would come in than ... what we would need ... So you'd have a huge rail of things to choose from ...  
(*Designer, design-led retailer*)

Once the sample garments have been made and/or buyers have made an initial selection of samples from suppliers' showrooms, garments are assessed in the first of a series of buying meetings. The data show once again that, contrary to Hirsch's argument, cultural commodities are not merely accepted or rejected at filtering stages, but very often undergo a process of modification to make them more suitable for the target customer and to ensure that they will sit well with the rest of the range. Thus, range-selection involves modifying samples, as well as a straightforward rejection and acceptance of sample garments. Carla's statement illustrates this point well:

*Carla:* ... the buyer liked this [shows me a sample] ... that's how we've submitted it like that, she likes that, but she just wants 'Aloha' ... written around the side of it. ... So it's just a case of ... hopefully if we've got the right ... product, just a bit of a streamline or minor change. Sometimes a colour change and that's it really [...] things tend to get lost along the way for price or styling ... [if] we'd originally select out 10, sometimes ... some of the garments out of that 10 will be taken out and replaced with another garment of a similar theme ... So what's initially picked in the meeting doesn't necessarily go into production. Quite often they're changed around.  
(*Designer, buying-led manufacturer*)

It is not just suppliers' samples that undergo this threefold process of assessment, but also garments that have been designed in-house. Thus, when designers of design-led companies present their range of sample garments to the buyers it is highly unlikely that the complete range will be bought without any changes. Both designers and buyers are aware that over the course of the following weeks and numerous selection meetings, the range will be further developed and changed to maximise its potential:

*Sophia:* ... [when] I present them [the buyers] with the full range I say ... 'Everything is changeable, but these are for me the best combinations that I have so far, given our customer, given our boundaries ...'  
(*Designer, design-led retailer*)

*Tanya:* ... we don't just see the range and say 'Yes, that looks fantastic! We have it all' ... there is a lot of nitty-gritty working through, working around

with different samples until we come up with something that's a buyable range for the UK market.

*(UK Merchandise Controller/Buyer, design-led retailer)*

Francis, a buyer for a design-led retailer, for instance argues that she only buys approximately 75 percent of the range designers initially present to her, because it never completely fits the three criteria – '(a) commercial, (b) fantastic, and (c) all the colours and all the silhouettes I need' – that she uses for assessing the range's suitability. This means that although in design-led companies the range is driven by designers, with buyers only marginally involved in product-related issues, buyers do exert some influence on the product at this stage. Francis, for example, makes use of the information gained through the analysis of past sales data and asks designers to include some 'bestsellers', i.e. certain garments and silhouettes that she is confident will be commercial.

It is at this stage that buyers will start to range stories and garments according to their commerciality. Tanya, for example, argues that her design team will present her with approximately 10 stories out of which she will select no more than 6 per season. She will then proceed to range the stories according to their commerciality. This means that stories that she believes to be commercial successes may make up as much as 35 percent of her total buy, while high-fashion stories, though they are important for maintaining the company image, are known to sell less well in the shops and consequently only account for 5 percent of Tanya's buy – 'that could be ... maybe 10 styles versus 50 in another group'. While Tanya is able to discard stories entirely at this stage, other companies that work closer to the season have to split their buying decisions over a longer period of time. Thus, buying/design- and buying-led companies will have placed core products and some product areas (such as tailoring) ahead of season while leaving the more fashion-forward products until the last moment. As we have seen earlier, this means that these companies have to commit to a basic framework of stories and colour palettes ahead of season which implies that once garments are committed as part of a certain story, this story cannot completely be taken out of the range. This is reflected in Lisa's account:

*Lisa: We can't throw them [stories] out altogether because somebody will have booked something for that look ... so we have to amalgamate it into another look ... there might be something that can be saved ... usually it's kind of ... just take what we've got and ... build it into another look. But garments we change completely at 'fits'.*

*(Assistant Buyer, buying/design-led retailer)*

As Lisa points out, stories cannot be discarded altogether but can at most be incorporated into another look, while the actual garments that make up a story can be changed. For example a story that has started out as very fashion-forward can be toned down and reworked to make it more commercial, a process described by Zoë and May as follows:

*Zoë:* ... it gets narrowed down from a commercial point of view ... we have this jet-set theme and it was pinks and corollas, quite bright, quite funky, but ... we needed a black, white and red look in there as well. Partly cause of the trend, you know a fashion thing, but you can't do gingham, well you can do them in orange and pink if you want ...

*May:* ... but are you going to buy a black and white one or an orange and pink [one]? (laughs). The buyers would like to go with the black and white. [...] they just know what's going to sell really. And what is the most commercial thing ...

*(Designer, buying-led retailer)*

These extracts suggest once more that buyers assess a collection from a commercial point of view and change it if necessary in order to fit their assumptions of what will sell best. While the sample range undergoes more dramatic modifications in the first selection meetings, changes become more minor towards the end of this process when garments reach the 'range review' stage (Sean). At this point, changes are made mainly in terms of the fit of garments or some details in their execution, for instance changes in the lengths of the sleeves. Moreover, the range will be assessed in terms of its coordination 'to make sure it all sits back together and everything looks right and everything looks like it's been [made] for us' (Sean). The coordination stage is especially interesting in that the range gets assessed in terms of its commercial and aesthetic merits, as the following observation from Sophia shows: 'co-ordination is ... quite a hard job, because you kind of have to overrule what [would be] somebody's ... commercial decision to what's aesthetic in the store.'

Having to assess ranges towards the end of the selection process in terms of their commercial and aesthetic viability, means that in companies in which designers are not directly involved in the actual garment-selection process, i.e. in buying/design- and buying-led retailers, this dual assessment falls into the buyers' domain. This observation not only strengthens the earlier characterisation of buyers' 'boundary spanning' occupational role, but gives rise to the argument that conflicts between aesthetic and commercial outlooks are indeed prevalent throughout the selection process, although they are held in check and reconciled by key players' shared customer image, which acts as a template for key players' decision-making

processes. In short, it can be argued that selection processes of high street womenswear retailers and suppliers are based on an interplay of teamwork and conflict. It can also be argued that selection within this type of culture industry is not merely based on the straightforward 'acceptance' or 'rejection' of proposals at a filtering stage, but often involves a process of manipulation to fit the perceived customer image.

## **Summary**

This chapter has shown that risk minimisation in the fashion industry is achieved by dividing selection processes into two distinct levels – trend forecasting and selection of actual garments – and by putting key players from different occupational groups (designers and buyers) in charge of each of these levels. This division of labour between key players gives rise to a number of subworlds, i.e. those of designers, buyers and merchandisers that are characterised by (a) the shared outlook found within each occupational group, and (b) the differences in outlook among groups. It is these differences in outlook that introduce a certain amount of conflict to fashion selection. However, the strong emphasis on teamwork during all stages of the selection processes suggests that practitioners overcome conflicts not so much by invoking existing power structures, but rather by adhering to a shared ordering principle, i.e. the target customer image, which helps social actors across different occupational groups to co-ordinate their efforts in a similar direction. Respondents did not perceive conflicts of occupational outlooks as negative, but as a means for assessing and reassessing their decisions in the light of how others interpret the likes and dislikes of the target customer group. Consequently, key players' conflicting rationales seem to strengthen the evaluation procedure because they call for a dialogue between actors, which acts as a risk reduction measure since practitioners are forced to continually evaluate their interpretation of their target customer in the light of conflicting versions. It could be suggested that a company's commercial success in an uncertain market environment, such as the fashion industry, is better served by facilitating dialogue between practitioners than by enforcing strict hierarchical structures. Subsequently, key players' emphasis on the importance of teamwork, which was regarded higher than adhering to chains of command, may be based on the uncertainty of their working environment.

In addition this chapter has shown that companies encourage conflicting rationales, because different interpretations of what is and is not acceptable for their target customers motivates players to pull themselves into line, i.e. to direct their decisions towards maximising the suitability of their company's garment range to

their target customers' desires. This is evidenced by the numerous examples of how practitioners modify their ideas, design proposals and actual garments in the light of their interpretation of their perceived target customers' image. Although players' interpretation of customers is not always accurate, the fact that they use a customer image as the basis of, and the guiding force in, their decision-making processes provides evidence of how fashion consumption enters into the realm of its production and influences both its producers and the actual cultural commodities.

## Notes

1. Only one company in the sample, namely Kim's company, does not employ a designer. Forecasting in this company is done by the product developer (Kim) and the buying director, as well as through input from suppliers and store managers.
2. Even Kate, who is the only designer in the sample who has no design colleague in her company, does not work in isolation. The data suggest that she has developed a close working relationship with Carla, a designer of one of Kate's suppliers, as well as her company's buying team which, in the absence of a design team, have taken on some of the functions usually associated with designers. Indeed, as we shall see, the division of labour between buyers and designers during the initial design process is not always clear-cut in buying/design and buying-led companies.
3. Anne's estimate of the number of designers and buyers across all branches of the company only includes those that are design-led. Thus, she discounts Zoë/May's buying-led company in her account.
4. Even interviewees whose companies do not rely on suppliers for their design input have commented on the difficulties that can arise when working with non-UK based manufacturers. A good example of this is Leah's description of some of the cultural problems that can occur when dealing with suppliers who have no first-hand experience of the UK market: 'There are certain places that you source products from and to get the right fashion you know you have to spoon-feed them – they will do exactly what you ask them to do ... India is a perfect example ... you draw a picture of a jumper and whoever has drawn the picture, if one sleeve is longer than the other, they actually make it like that. They can take it to the absolute t ... so literal, which could be positive or negative, but then I've worked with suppliers in India ... that [have] a Western eye, they can interpret what it is that you want. They will look at your design and they will not bastardise it and change it from what you want it to be'.
5. This development seems ironic since the woman who had occupied this role in Vivian's company has subsequently become the head of WGSN, the forecasting agency Vivian's company subscribes to.
6. 'Swatch' refers to the sample pieces of cloths designers pick up at fabric shows and from fabric suppliers.
7. The problems arising from this practice will be discussed in section 6.4.
8. Garment trails are often used by retailers to assess products they are unsure about and the outcome of the trails will determine whether or not a garment or style of garment will be put into larger-scale production.
9. Sarah and Tanya, for example, state that their companies do not issue designers with any such guidelines.
10. Interviewees' emphasis on selection as teamwork contradicts Vinhas da Silva's et al. (2000: 168) study on fashion buyers' buying behaviour in which they state that 63 percent of all buying decisions are individual. This raises the question whether there is a discrepancy in the data between interviewees' claims of teamwork and actual instances of teamwork. This is one of the areas where supplementing the interview data with observation would have been particularly useful.
11. DiMaggio (1977:443) speaks of an 'entrepreneurial brokerage' system, in which in which the broker has been given 'control over acquisitions and production decisions ... who ... may or may not abdicate it to creative workers themselves'. Thus, similar to Hirsch's concept of boundary spanning occupations, the broker's position in the company is between management and creative team.

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12. The two supplier-based designers in the sample, Carla and Vivian, maintained that it is important to have both their retail customer and end customer in mind.

13. Both Cantor (1971) and Gans's (1980) work suggest that decisions are based on the decision makers' own taste as well as their assumptions about the preferences of other gate-keepers within the industry - in this respect their theories resemble Ryan and Peterson's (1982) 'decision-chain' model.

14. There is no consensus among authors as to how influential media professional's perceptions of the audience are in their decision making. Indeed, there are a number of studies which suggest that media personnel lack detailed knowledge about the audience and that the impact of the imagined audience is subsequently small. Cantor (1971: 184), for example, argues that 'the audience, because of its size and distance, may be the least important of the reference groups considered [by TV producers] when content is selected.' Similarly, Gans (1980: 229-30) points out that his assumption that journalists take audiences' taste directly into account in their selection and production of stories was disproved in the course of his fieldwork. His findings suggest that journalists (a) have little knowledge of their audiences, (b) pay little attention to this already vague audience image, and (c) reject any feedback from them.

15. 'General reader' is the term used by the Book-of-the-Month Club's editors and judges to refer to the particular type of reader they perceive their subscribers to be. As with all membership categories, it denotes membership in both positive and negative terms. In the case of the Book-of-the-Month Club the categorisation 'generalist' indicates what types of books editors and judges expect their subscribers to like, while it also serves as a form of demarcation from other types of readers, for instance, 'desperately needy ... occasional readers' (Radway, 1997: 103) as well as highly specialised readers interested only in a narrowly defined field.

16. However, there are important differences between TV audiences and fashion consumers in that the former is larger and more heterogeneous than the latter, which may make it more difficult for TV producers to make predictions about audiences' taste. Moreover, TV audiences are more distant from TV producers, because watching TV is an activity that, for the most part, takes place in private. On the other hand, clothing retailers interact with their customers more directly and hence are in a better position to 'get to know' their customers.

17. In fact, Hirsch classifies writers and musicians, etc. and not their 'products' as raw material. However, as we have seen, artists do not work in isolation but are directly and indirectly influenced by others: not only do they take some form of inspiration from other social actors, but the creation of their art work itself involves others, albeit in minor roles. Thus, like the inspirational sources the respondents draw upon, Hirsch's pool of raw materials is influenced by the wider cultural arena.

18. Tim's company operates differently in that respect. Although, as we have seen, the design team puts forward more than twice as many design proposals than needed, all of them go into the first sampling stage; it is only after the buyers have seen the actual product that the range gets narrowed down.

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## Conclusion

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The aim of this thesis has been to learn about the social world of womenswear retailing through empirical research on high street womenswear retailers' fashion forecasting and garment selection processes. This sector of the fashion industry was chosen not only because retailing has emerged as the dominant sector within the industry in the 1980s, but also because today's retailers are the site where production and consumption intersect. By studying the micro level organisation of forecasting and garment selection in womenswear retailers it was hoped to gain insights into how production and consumption come together to influence the content and shape of womenswear.

It is now time to look back, take stock and ask how this thesis has contributed to our understanding of how the 'culture of production' shapes the garments that are produced and to assess the extent to which consumers are implicated in the production processes. This can be done on three levels: (i) by looking at the study's contributions to the existing literature on culture industries, (ii) by assessing the impact of the 'target customer image' on the interactions between producers and consumers of fashion, and (iii) by asking to what extent consumers can be said to 'get what they want'.

To this end we will look at how the impact of demand uncertainty on industry systems is treated in the theoretical discussions of Chapters 1,2 and 3. In addition we will ask how these bodies of literature portray the influence of consumers on the production processes. We will then recapture the main arguments of the empirical findings that have been examined in detail in Chapters 5 and 6. Firstly, we will look once more at design-, buying/design- and buying-led retailers' differentiation strategies and highlight the fit between retailers' working practices and the clothes buying patterns of their specific target customer group. This discussion will be followed by an examination of the interrelation between demand uncertainty and the self-referential nature of the womenswear industry.

Secondly, we will revisit retailers' fashion forecasting and garment selection processes in order to highlight how the empirical findings of this study both challenge and contribute to existing research on selection processes in culture industries. In addition to showing how an analysis of the division of labour between designers, buyers and merchandisers can help us understand the organisational structures of womenswear retailers, emphasis is put on the role of the ordering

principle in guiding and facilitating collective activity and in smoothing over conflicts between these three occupational groups.

The notion of the ordering principle is addressed by looking at how other studies of culture industries and art worlds seek to explain the coordination of social actors' efforts. Based on the empirical findings of this study traditional explanations of the ordering principle are put into question and instead it is suggested that we need to look at the role of the 'target customer image' in order to understand how collective activity becomes possible in the realm of womenswear retailing.

The chapter ends with a discussion of the impact of the target customer image on key players' decision-making processes. Particular attention is paid to the question whether the target customer image can be seen as a means of institutional control over customers or as indication of customers' influence on the production of cultural artefacts.

### **Demand Uncertainty And The Question of Producer/Consumer Co-Production**

This thesis has drawn on a variety of theoretical approaches that have given shape and added depth to the arguments developed here. Two common threads, which implicitly and explicitly run through the theoretical components of this thesis, are picked out and discussed in this section: the notion of demand uncertainty and the producer-distributor-consumer relationship.

The discussion in Chapter 3 has shown that womenswear has always been a market ridden by demand uncertainties. As a consequence, Fine and Leopold (1993) argue, the womenswear industry has developed flexible production processes, labour relations and interfirm arrangements conducive to coping with fluctuations in demand, which are markedly different to those in more stable sectors of the clothing industry, i.e. menswear and childrenswear. Ready-to-wear clothing, for instance, was adopted some fifty years later in womenswear than in menswear, because the lavish fashions of the 19<sup>th</sup> century, the absence of a standardised sizing system and the unpredictability of consumer demand made it difficult for manufacturers to cater for 'customers at a distance', i.e. for producing garments in advance for unknown customers. This meant that well into the 20<sup>th</sup> century women who could afford it continued to buy bespoke garments, while large numbers of the UK population had to rely on second-hand or homemade clothing.

By tracing the differential adaptation of ready-to-wear clothing systems in menswear and womenswear, it was suggested that the fashion-level of a clothing system and the demand uncertainties and seasonal fluctuations its producers and

distributors experience are interrelated, and that they influence the structural organisation of a commodity system. In addition, it was shown that even as early as the 19<sup>th</sup> century demand uncertainty has encouraged industry practitioners to devise strategies to cope with its effects. For example, manufacturers of fashion-sensitive garments sought to stabilise their market position by increasing their competitive advantages through product differentiation (Godley, 1998), while retailers aimed to place their orders as close to the season as possible to avoid carrying the wrong type of garments or excess stock.

The divergent historical development of menswear and womenswear suggests that the specific interplay between producers, distributors and consumers within a 'system of provision' determines the characteristics of the commodities it produces as well as its internal structures. This does not suggest that all three groups have equal weighing simultaneously (Fine and Leopold, 1993: 74), but rather it draws attention to the possibility that at any given time one of these groups will take the lead and come to dominate a commodity system. Indeed, we have seen that the manufacturer-retailer relationship within womenswear has undergone important changes with retailer's introduction of own-label clothing and niche marketing in the 1980s.

However, although the system of provision approach acknowledges that consumers have an influence on the production process, their influence is mainly felt in the form of demand uncertainty. Consumers are portrayed as an unknown entity whose demands neither manufacturers nor retailers can know in advance. Hence the characterisation of clothing production as a last-minute endeavour of as many different small-batches of garments as possible. It is suggested that only with the actual sales, do manufactures and retailers have any idea of which garments are in demand, and needed to be repeated quickly, and which production runs to cancel. Thus, there is no sense of really 'knowing' the customer and understanding what she wants. Although consumers, via the notion of demand uncertainty, are implicated in the organisational structures of the production and retailing of garments, there is no co-production in the sense of production being guided by assumptions of what the customer wants. Consumers thus remain somewhat excluded from the domains of production and retailing, since they do not seem to have an impact on the actual internal decisions of what is produced and stocked. Although consumers are not portrayed as passive beings that consume whatever is presented to them - a stance taken by supply-led theories (see discussion in section 2.2.3) - they are nevertheless marginalized in that they have no influence over the content and shape of the actual garments on offer.

Although in the system of provision approach consumers are only indirectly implicated in the production and distribution of clothing, this approach adds a dimension to the analysis of the production of commodities that is missing from research in the production of culture tradition because it emphasises the shifting power relationships between producers, distributors and consumers. Even though production of culture proponents argue that cultural artefacts are shaped by those involved in their creation, manufacturing, distribution, exhibition, evaluation and consumption (Peterson, 1976: 672), the shifting power dynamics remain largely hidden. However, while the system of provision approach is a useful tool for looking at how an industry has dealt historically with demand uncertainty the production of culture tradition provides an invaluable springboard for analysing the micro organisational structures and strategies adapted by culture industries to cope with unstable market conditions, by devising models of selection processes (e.g. Hirsch, 1972; Ryan and Peterson, 1982).

Hirsch (1972), for example, offers a 'gatekeeping' approach to cultural selection. He argues that gatekeeping systems are essential in culture industries, because they help these industry systems to manage their high level of demand uncertainty in both their input and output boundaries (Hirsch, 1972: 639). In addition to using gatekeepers to process the flow of cultural goods, culture industries have also adopted a number of other strategies to counter the negative impact of demand uncertainty on their market position. Hirsch (1972: 652), for instance, argues that culture industries rely on overproduction and differential promotion of new items both to limit demand uncertainty and to reduce their dependence on mass media gatekeepers.

Both Hirsch (1972) and Ryan and Peterson's (1982) work offers a useful point of departure from which to think about the actual procedures and organisational structures involved in culture industries' processing of artefacts and in the strategies adopted by them to cope with the effect of demand uncertainty. Indeed, what makes these models still important today is that they seek to investigate the 'black box' of cultural production by looking at the working practices of those involved in the selection of cultural artefacts. However, as the discussion in Chapter 1 has shown Hirsch and Ryan and Peterson's models are rather static, unidirectional and entirely conflict free. Hirsch, for instance, neither considers that cultural production involves the collaboration of individuals nor does he inquire as to what motivates actors' decision-making processes. Although Ryan and Peterson emphasise the importance of collective activity in the production of cultural artefacts, the individuals 'involved' in these processes remain curiously *uninvolved*, there are no personal claims at stake

and individual differences are abandoned for the greater good of following the company directive and maximising its profit. As Negus (1997: 100) points out, individual workers are seen as passive agents who merely pass on products to the next node in the chain without actively intervening, shaping and changing them.

In addition, both the 'filter-flow' and 'decision-chain' model marginalizes consumers' role. Similar to the system of provision approach, consumers' influence in the production process is only acknowledged indirectly in the form of demand uncertainty and through the analysis of sales data. Hirsch (1972: 649), for instance, sums up the role of consumers by stating that they are merely 'rank ordering cultural styles and items "preselected" for consideration by role occupants in the managerial and institutional subsystems'. Once again, consumers' voices are not heard during the production stages – it is only through sales records that industry practitioners seem to become aware of consumers and respond to them by producing 'more of the same', i.e. by selecting new cultural producers/products with similar qualities to those that have been previously successful (Crane, 1992: 75). Even though system of provision and production of culture proponents maintain that it is the interplay of production, distribution *and* consumption that shape cultural products the way in which consumers influence industry systems through their consumption practices, i.e. the relationship of co-production, remains hidden and consumers stay at the outside.

However, if claims of post-Fordist theorists are to be believed, the nature of consumption changed dramatically towards the end of the 20<sup>th</sup> century. There seems to exist a consensus among post-Fordist theorists that consumption has moved beyond the 'bland consumerism' (Scott, 2000: 21) associated with Fordism, towards more individualised consumption patterns. Murray (1989: 44), for instance, claims that consumption is no longer fuelled by the need to keep up with others, but rather by the wish to differentiate oneself from them. In similar vein, Lash and Urray (1994: 61) speak of 'reflexive consumerism', in which individualisation is the driving paradigm. The increased emphasis on consumption as a means to fulfil one's identity project is said to have given rise to a multitude of 'highly differentiated niches and life-style types' (Scott, 2000: 21). It is conceivable that the gratification of the tastes of these atomised consumer groups requires some internal changes in the way in which industries engage with consumers. Nixon (1997: 193), for instance, has argued that companies are now more focused on the 'end-user' and have downgraded internal priorities in favour of being more strongly customer-led. Thus, the reading of post-Fordist theorists suggests that industry systems' internal structures may have become increasingly consumer-focused, more so than at the time when Hirsch

(1972), Ryan and Peterson (1982) and Crane (1992, 1994) conducted their research. Indeed, the notion of being 'customer-led' may suggest that today's (culture) industries are more directly engaged in a relationship of co-production with consumers, than was the case even ten years ago.

Following this outline of theorisations of the impact of demand uncertainty and the consumer-producer relationship, it is now time to revisit the empirical findings to highlight how they can contribute to our understanding of selection processes in culture industries and the extent to which cultural artefacts can be said to be co-produced by consumers and producers.

### **The Culture of Production of Womenswear Retailers**

The analysis of the culture of production of UK high street womenswear retailers has taken place on two levels. Firstly, differences in the working practices of design-, buying/design- and buying-led retailers were assessed in terms of their differentiation strategies and how innovation – in the form of fashion forecasting – is structured within them. Associated with this discussion are questions concerning the self-referentiality of fashion and its role in restricting demand uncertainty.

Secondly, selection processes were analysed by looking at key players' 'bundle of tasks', the division of labour between them as well as the relationship between teamwork and conflict and the role of the ordering principle in guiding practitioners' decision making.

### **Retailers' differentiation strategies**

As we have seen womenswear retailing, and especially the middle-market, is highly competitive in that a great number of companies target fairly similar customer groups. It is thus important for retailers to carve out their specific market niche in terms of their pricing and product offering. As we can see in Table 8, most design-led retailers are located on the high-mid end of the market, they cater for the age group that spends most money per week on clothing (Family Expenditure Survey, 2000: 39) and have a low to moderate level of fashionability. Buying/design- led retailers, on the other hand, cater for a younger, less affluent, yet altogether more fashion forward market, while buying-led retailers' cater for a similarly young, fashionable customer who is slightly more price-conscious.

As the discussion in section 5.3 has shown, retailers' aim to adjust their fashion level to that of their target customer group. For example, most of the design-led retailers in the sample cater for women who, based on their clothing buying patterns, could be described as 'wardrobe builders', while customers of

buying/design- and buying-led retailers may be characterised as ‘frequent buyers’. The first group of women is inclined to spend larger sums of money per garment than the second, but tends to buy new clothing less frequently. Thus, garments suitable for ‘wardrobe building’ have to last a number of seasons – this implies that they ought to be of good material quality and have only a moderate degree of fashionability, not only to avoid looking outmoded as soon as the season is over, but also because women who follow this type of buying pattern are perceived as being more interested in pursuing their individual style than they are in following fashion. In contrast, garments aimed at a market of ‘frequent buyers’ prioritise the fashion content of garments - in this market it is important to frequently present customers with affordable fashion updates.

**Table 8 Characteristics of Retailer Categories**

<b>Characteristics of Companies</b>	<b>Design-led Retailers</b>	<b>Buying/design-led Retailers</b>	<b>Buying-led Retailers</b>
<b>Average Market Position</b>	High-mid end	Mid-cheap end	Cheap-mid end
<b>Average Fashion Level</b>	Low-Modest	High	Modest-high
<b>Average Target Customer Group</b>	35-60 year olds	18-30 year olds	18-30 year olds
<b>Customers’ Buying Patterns</b>	‘Wardrobe Builders’	‘Frequent Buyers	‘Frequent Buyers
<b>Proportion of Garments Designed In-House</b>	High to exclusive	Medium to high	Low
<b>Key Inspirational Sources (in order of influence level)</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Fabric and Trade Shows</li> <li><input type="checkbox"/> Buying Trips Abroad</li> <li><input type="checkbox"/> Some Forecasting Agencies (especially Colour Prediction Services)</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Catwalk Shows</li> <li><input type="checkbox"/> WGSN and some other Forecasting Agencies</li> <li><input type="checkbox"/> Celebrities and the Media</li> <li><input type="checkbox"/> Other UK Retailers</li> <li><input type="checkbox"/> Buying Trips Abroad</li> <li><input type="checkbox"/> Fabric and Trade Shows</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Catwalk Shows</li> <li><input type="checkbox"/> Celebrities and the Media</li> <li><input type="checkbox"/> Other UK Retailers</li> <li><input type="checkbox"/> Buying Trips Abroad</li> <li><input type="checkbox"/> Fabric and Trade Shows</li> <li><input type="checkbox"/> WGSN and some other Forecasting Agencies</li> </ul>
<b>Differentiation Strategy</b>	Uniqueness	Continuous Innovation	Continuous Innovation

In line with the discussion of Fine and Leopold's (1993) system of provision approach, differences in the level of fashionability have a significant impact on companies' organisational structures. Thus, the clothing buying preferences of retailers' target customer group are reflected in the different working practices and differentiation strategies that have been adopted by design-led retailers, on the one hand, and buying/design- and buying-led companies on the other. The term 'differentiation strategy' has been coined for this study to denote retailers' specific tactic to carve a market niche for themselves through the products they are offering. A differentiation strategy is akin to a retailer's philosophy, i.e. their approach to their market and customers.

Looking firstly at design-led retailers, we see that their average garment-lead times are considerably longer than those of buying/design- and buying-led retailers, which indicates that design-led retailers can spend a longer time putting their ranges together than other types of retailers. This is reflected in design-led retailers' practice of designing all or at least most of their ranges in-house 'from scratch'. Designers in this type of company have a broader area of responsibility: in addition to fashion forecasting and the creation of design proposals, they are responsible for the sourcing of fabrics, they liaise with suppliers and chase orders – in other words they are involved in the production process from start to finish (see Table 9, p. 287). This holistic involvement of designers in the production process allows them to exert a greater influence over the products and is a well-suited approach for retailers to develop a unique style of 'hand-writing'. Thus, design-led retailers' differentiation strategy can be said to follow the principle of 'uniqueness'. This suggests that design-led retailers seek to stand out from their competitors by offering a distinctive 'hand-writing' in their product range that is hoped to secure customers' loyalty. To this end, designer based in design-led retailers are given much greater freedom to pursue their ideas and to direct the range than is the case in the other types of high street retailers.

The more restricted approach to garment design in buying/design- and buying-led retailers, on the other hand, is related to the fact that they work much closer to the season. As Table 9 shows, in these companies the role of the designer is more akin to that of a fashion forecaster, with buyers taking over many of the product-related tasks. There are slight differences between buying/design and buying-led retailers: in the former designers share some of the responsibility for selecting garments with the buyers, while buyers clearly dominate the range building process in the latter. However, in both types of company it is the responsibility of the buyers to see suppliers and choose sample garments. This leaves designers more or

less restricted to devising storyboards and colour palettes for buyers. Indeed, in these types of companies, designers only create some of the range in-house and the design process itself is fundamentally different: instead of designing garments from scratch, buying/design- and buying-led based designers often do versions of other retailers' garments or seek to adopt items from the catwalk for their type of market – hence the design process in these companies has been called 'pick and choose'. Given buying/design- and buying-led retailers' emphasis on following fashion, the differentiation strategy of these types of companies can be described as 'continuous innovation', i.e. a desire to be quick in picking up and translating trends to make them suitable for their market. This emphasis on following fashion also helps to explain the more restricted position of designers in buying/design- and buying-led companies. Rather than aiming to create unique garment ranges that stand out and can be recognised for their own creative qualities, the main task of buying/design- and buying-led designers is to spot trends that can be translated into a format appropriate for their market. Here, it is the likeness to catwalk or celebrity styles that transfers status onto garments.

From these observations we can see (i) that there is a match between the clothing consumption pattern of a retailers' target customer group and the differentiation strategy employed by the company, and (ii) that retailers' working practices are influenced by their own and their customers' level of fashionability. Indeed, since retailers stock a mix of fashion, contemporary and basic ranges, there is evidence that, even within the same company, working practices are adjusted to suit the respective fashion level of the garments that are being produced.

### **Demand uncertainty and the self-referentiality of the womenswear industry**

The development of any clothing range starts with the collection of trend information and inspirations from a variety of sources; in Table 8 the main sources of inspiration for each retailer category have been recaptured. We can see that design-led retailers predominantly draw on fabric and trade shows, buying trips abroad and, occasionally, on forecasting agencies. Buying/design- and buying-led retailers, on the other hand, additionally draw inspiration from catwalk shows, celebrities and the media as well as other UK retailers.

The selection and rank ordering of inspirational sources by companies is based on their perception of the clothing preferences of their target customer group. Buying/design- and buying-led retailers' customers, for instance, are perceived as using 'prestige personalities' as their frame of reference and subsequently these

retailers put great importance on keeping abreast of catwalk innovations and of which celebrities are heralded as the current style-icons. However, whatever sources of inspiration companies use, they have to translate them into a format that is appropriate for their customers. If retailers believe that a particular colour, fabric or cut is inappropriate for their customers they will not run it or run it only in a small quantity.

Despite retailers' endeavours to produce garments that are suitable for their specific target customer and to employ differentiation strategies that will secure their market niche, many high street retailers have fairly similar product offerings. This is due to a number of reasons. Firstly, many retailers target relatively similar customer groups which are often also fairly broad – thus the reality of the UK high street suggests that the strategy of niche marketing and life-style retailing, which is said to have increased since the 1980s (du Gay, 1996: 97), has not (yet?) resulted in a majority of highly specialised retailers. Moreover, the inherent demand uncertainty (Hirsch, 1972; Crane, 1992) in cultural production has meant that the clothing industry has adopted a number of specific internal strategies to deal with this obstacle. As we have seen, the fashion sensitive segments of the clothing industry have traditionally favoured flexible production practices and have aimed to work as close to the season as possible. This tactic of coping with demand uncertainty is clearly still practiced by buying/design-led and buying-led retailers that, after all, have the highest level of fashionability among high street retailers. Since catwalk innovations and media prestige personalities are seen as the yardstick of fashionability, buying/design- and buying-led retailers aim to follow these trendsetters as quickly as it is fitting for their target market. In addition, the ability of buying/design- and buying-led retailers to react quickly to trend developments also allows them to use other UK retailers as inspirational sources. Thus, they regularly go on 'directional shopping' trips, in the UK and abroad, to visit high street trendsetters with the aim of finding garments that they can copy.

Design-led retailers' emphasis on uniqueness, and the absence of the pressure to ceaselessly assimilate and reflect cultural innovations, means that they do not face the problem of product sameness to the same extent as buying/design- and buying-led companies'. Yet, the fact that design-led retailers are part of the wider fashion world means that they cannot avoid being influenced by it to some extent, especially in the form of colours or fabrics. Thus, although the product offering among design-led retailers is more diverse, there are still certain similarities between them, for instance, in terms of colours or themes.

It is important to point out that sameness among retailers is not only caused by the practise of drawing on similar sources of inspiration and having overlapping and/or too broad target customer groups it is also triggered by the self-referential nature of the fashion industry. Thus, in order to lessen the impact of demand uncertainty the fashion industry has devised a number of strategies to limit or filter cultural innovations. For instance, the choice of colours is limited by the Colour Authority whose delegates select approximately thirty colours for each season, which are then passed on to the worldwide fashion industry (Costantino, 1998: 43-4). In a similar vain the most influential fashion trade show, *Première Vision*, seeks to guide visitors' choices by issuing daily 'bests' - reports that list the best-selling colours and fabrics. Manufacturers also seek to direct buyers' choices by divulging information about which garments have been bought by other retailers.

While these practices can be seen as an expression of the formation of collective taste (Blumer, 1973) among industry practitioners, in that they become more aware of emerging trends during the course of their interactions with one another, they can also be interpreted as economically motivated strategies to 'curdle' choice and hence reduce demand uncertainty. Manufacturers, for instance, have been shown to 'share' information amongst their retail buyers in the hope to direct their choices and thus boost the sales of particular sample garments, since it is more profitable for them to run fewer styles in larger numbers than a greater number of small batches. Likewise, the practice of copying garments from other retailers is based on the assumption that it is at times easier to repeat someone else's proven bestseller, than to come up with an original - this tendency for cultural producers to repeat successful formulas has also been noted by Crane (1992). Similarly, the reason why the organisers of *Première Vision* chose to present visitors with information on the daily bestsellers maybe related to their desire to make the trade show more user-friendly, while at the same time raising its profile as being *the* event of the fashion year where one can see and be part of newly emerging trends. In the same way the delegates of the Colour Authority, who are drawn from leading fabric companies and colour services, have a clear economic interest in setting colour trends and limiting choice. Since the fashion cycle starts with the selection of colours, fabric mills have to work well in advance of the season and can simply not afford sudden last minute changes in direction. Through the institution of the Colour Authority the textile industry aims to set worldwide colour trends that, due to their omnipresent nature, are likely to go unchallenged. Hence setting colour trends in this way is a safety measure that helps the textile industry and colour services to work so far ahead of season.

Thus, one can argue that the existence of a number of industry-wide strategies to limit and filter innovations helps to restrict the actual pool of cultural referents available to industry practitioners. Although this causes greater similarity between retailers, it also reduces the risk of missing trends. By the same token, limiting the choice of innovation on the industry level implies a more narrowly defined area of choice on the consumption level and hence can be seen as a potent measure for reducing demand uncertainty. This suggests that, similar to other culture industries, the womenswear industry has adopted strategies to cope with demand uncertainty. Moreover, as suggested by Hirsch (1972) and Crane (1992), the existence of such industry-wide filtering processes implies that the various agents involved in the production of womenswear not only shape the products that are available, but determine what reaches the end-consumer. Seen purely from this angle, consumers of fashion have no direct influence over the production processes other than towards the end of the production cycle when they make their consumption choices – an interpretative stance advocated by Hirsch (1972), for instance. Yet, as the following discussion of designers, buyers and merchandisers' working practices at the fashion forecasting and garment selection level will show consumers can be said to be indirectly implicated in the production processes through the ordering principle that guides key players' decision making.

### **Sequential selection and the division of labour between key players**

As we have seen, culture industries employ a number of strategies to cope with demand uncertainty. One of these tactics is to organise the selection of cultural artefacts sequentially, which implies the assessment of artefacts at strategic points within the selection process by different sets of social actors (Hirsch, 1972; Ryan and Peterson, 1982). This structural organisation can also be observed in the womenswear retailing industry, where the production process is divided into two distinct levels, namely fashion forecasting and garment selection, which are dominated by different occupational group.

As the name suggests, the fashion forecasting stage is where the inspirational sources companies draw upon are collected and assessed by designers. The main priority at this point of the production process is to devise storyboards, colour palettes and, predominantly in the case of design-led retailers, design proposals. These are then passed on to the next set of social actors, the buyers, at the secondary selection level who will use them to select actual (sample) garments - depending on the type of retailer sample garments are either chosen from the retailers' own design proposals or from manufactures' ranges.

The basic structure of the selection process found among womenswear retailers is not unlike that of Hirsch's (1972) first gatekeeping system, which he differentiates into technical/creative and managerial sub-systems. Similar to the role of the designers on the fashion forecasting level, the creative sub-system has to propose 'cultural innovations', while the tasks performed by the buyers and merchandisers on the garment selection level is akin to those of the managerial sub-system. However, while Hirsch points out that the managerial sub-system often abdicates its role of cultural selection in favour of the technical subsystem, this is not the case in womenswear retailing. Here the buyers are the dominant players who are responsible for selecting the garment range, while the level of influence of designers and merchandisers varies depending on the type of company (see Table 9). Buyers' position in the selection process is similar to, what Hirsch calls, 'boundary spanning' occupations in that they provide the link between the creative workers (designers) and the purely commercial level (merchandising). Moreover, while Hirsch argues that the managerial level often only becomes involved by setting budgetary limits for the technical subsystem, we find that the managerial level of womenswear retailers only becomes involved much later in the selection process, i.e. once the final range is presented, and that the responsibility to set budgets, for example by devising buying grids for the buyers, is one of the merchandisers' key tasks. The differences in designers, buyers and merchandisers' 'bundle of tasks', according to the three types of retailers, can be seen in more detail in Table 9.

**Table 9 Key Players' Area of Responsibility According to Company Type**

Key Players' Bundle of Tasks	Design-led Retailers	Buying/design-led Retailers	Buying-led Retailers
<b>Role of Designers</b>	<input type="checkbox"/> Fashion Forecasting <input type="checkbox"/> Creation of Design Proposals <input type="checkbox"/> Significant Impact over Selection of Garments <input type="checkbox"/> Liasing with Suppliers <input type="checkbox"/> Chasing of Orders	<input type="checkbox"/> Fashion Forecasting <input type="checkbox"/> Some Influence over Garments Selection	<input type="checkbox"/> Fashion Forecasting <input type="checkbox"/> Minimal Influence over Selection of Garments
<b>Occupational Outlook</b>	➤ Creative/Aesthetic	➤ Creative/Aesthetic	➤ Creative/Aesthetic
<b>Influence Level</b>	➤ High-medium	➤ Medium	➤ Low
<b>Role of Buyers</b>	<input type="checkbox"/> Selection of Sample Garments	<input type="checkbox"/> Selection of Sample Garments	<input type="checkbox"/> Selection of Sample Garments

<b>Occupational Outlook</b>  <b>Influence Level</b>	<input type="checkbox"/> Grading of Garments <input type="checkbox"/> Occasionally: Issuing of Design Brief  ➤ Creative/Commercial  ➤ High-medium	<input type="checkbox"/> Liasing with Suppliers <input type="checkbox"/> Chasing Orders <input type="checkbox"/> Grading of Garments <input type="checkbox"/> Selection of Colours for Core Lines <input type="checkbox"/> Issuing of Design Brief <input type="checkbox"/> Some Design Impact  ➤ Creative/Commercial  ➤ High	<input type="checkbox"/> Liasing with Suppliers <input type="checkbox"/> Chasing Orders <input type="checkbox"/> Grading of Garments <input type="checkbox"/> Selection of Colours for Core Lines <input type="checkbox"/> Issuing of Design Brief <input type="checkbox"/> Some Design Impact  ➤ Creative/Commercial  ➤ High
<b>Role of Merchandisers</b>  <b>Occupational Outlook</b>  <b>Influence Level</b>	<input type="checkbox"/> Analysis of sales' data <input type="checkbox"/> Grading of stores <input type="checkbox"/> Determination of Volume and Spread of Ranges across Stores  ➤ Commercial  ➤ Low	<input type="checkbox"/> Analysis of sales' data <input type="checkbox"/> Grading of stores <input type="checkbox"/> Issuing of Buying Grid <input type="checkbox"/> Determination of Volume and Spread of Ranges across Stores  ➤ Commercial  ➤ Medium	<input type="checkbox"/> Analysis of sales' data <input type="checkbox"/> Grading of stores <input type="checkbox"/> Issuing of Buying Grid <input type="checkbox"/> Determination of Volume and Spread of Ranges across Stores  ➤ Commercial  ➤ Medium
<b>Dominant Occupational Group</b>	Designers	Buyers/Designers	Buyers

Although the selection processes in womenswear retailers show some basic similarities to Hirsch's model there are a number of important differences between the two that can be seen when taking a closer look at the implications of key players' division of labour on the selection process.

### **The balance of power: the interplay between teamwork and conflict**

The investigation of actors' areas of responsibility is important, because in order 'to analyse an art world we look for its characteristic kinds of workers and the bundle of tasks each one does' (Becker, 1982: 9). Through the analysis of the division of labour between the key occupational groups we can draw inferences as to the balance of power between them. For example, although designers are the key occupational group at the forecasting level they only exert a significant impact at the garment selection stage in design-led retailers. In the other two retailer categories, buyers have taken over many of the product-related tasks and designers' area of influence as been substantially curbed - while designers exert some influence over

garment selection in buying/design-led retailers they have only a minimal impact on this selection level in buying-led retailers. The average level of impact of designers, buyers and merchandisers in design-, buying/design and buying-led retailers on the selection process as a whole can be seen in Table 9.

The division of labour between designers, buyers and merchandisers in womenswear retailing gives rise to different occupational outlooks, which follow along a creative-commercial dimension. Thus, designers have been shown to be predominately guided by creative/aesthetic considerations, while merchandisers' concerns are commercial in nature – though neither occupational outlook completely excludes the other. True to their boundary spanning role, buyers combine both creative and commercial considerations in their decision-making process. The data suggest that these differences in occupational outlook are shared across the retailer categories and that companies in fact actively encourage them. While merchandisers and buyers' (predominantly) commercial outlook is in line with commercial companies' desire to make profit, designers have to negotiate between their creative/aesthetic outlook and the restrictions that working for a commercial organisation poses on their work. This tension was particularly felt among buying/design- and buying-led designers who are working in a fairly restricted design environment.

Notwithstanding the existence of clear hierarchical structures, buyers are ultimately responsible for the selection of garment ranges, there is some evidence of conflicts between key players, which indicates that fashion workers not simply and uninterestedly pass on responsibility to the next node in the chain, as both Hirsch (1972) and Ryan and Peterson (1982) have claimed. It has been suggested by this study that conflicts arise for two reasons: firstly, because teamwork is of great importance throughout the selection process, interviewees across the board have repeatedly emphasised its importance, and secondly, because of the differences between key players' occupational outlooks.

These observations suggest that womenswear is neither the creation of one individual, nor are any decisions concerning the shape and look of garments purely down to one person. Instead, the final garment ranges have to be seen as products that bear the signs of the specific collective activities involved in their production – an interpretative stance not only fundamental to the theoretical arguments of production of culture proponents (e.g. Peterson, 1976, Crane, 1992, 1994), but also to Becker's (1982) analysis of the role of collective activity in art worlds.

This interpretation of the significance of teamwork in the creation of cultural artefacts and works of art stands in stark contrast to Hirsch's model, which is based

on the assumption that a 'creator genius' who is the only one involved in the making and that subsequently 'raw materials' are merely selected or rejected, without any interventions from others. However, the evidence from the data clearly puts into question these claims. Although, the surplus of ideas and samples means that rejection of items is commonplace, straightforward acceptance is not. Instead, there is ample evidence both on the forecasting and the garment selection level that practitioners, as suggested by Ryan and Peterson (1982), continuously modify ideas and sample garments up to the last possible moment. Indeed, in the course of this process the changes that are being made can be so dramatic that there is only a faint resemblance between the 'original' and the 'end product'. The continuous tweaking of ideas and sample garments therefore has to be seen as a core activity in the selection process: it is highly unlikely that an idea will pass through the design proposal and sample garment stage unchanged.

### **The ordering principle**

Given that the selection processes of womenswear practitioners involve a moderate degree of conflict, due to differences in occupational outlooks, and high instances of teamwork, the paramount question one has to ask is how designers, buyers and merchandisers coordinate their activities. Indeed, as soon as we move away from the conception of the artist as creative genius who works in isolation, implied in Hirsch's (1972) model for example, we need to find out what guides actors' decision making, i.e. we need to look at the 'ordering principle' that facilitates collective activity among practitioners.

In our discussion of selection processes in culture industries and the organisation of art worlds, we have come across different explanatory models that seek to elucidate the underlying structures that make joint activity possible. As we have seen, Ryan and Peterson (1982) use the notion of the 'product image' to account for the unidirectional decision making processes of music industry practitioners. Superficially, the notion of the product image also seems applicable for explaining womenswear practitioners' decision making, since we have seen that interviewees are aware that working for a commercial organisation poses certain restrictions on their working practices. However, the notion of the product image alone does not tell us much about what constitutes it, i.e. the underlying criteria that have to be satisfied by social actors' selections of cultural artefacts. Indeed, a similar criticism can be levied against Becker's (1982) argument that collective activity in art worlds is facilitated by conventions. Again, we do not learn about the origin of

conventions, i.e. the processes and structures involved in bringing about the institutionalisation of shared conventions.

Likewise, in his endeavour to trace the career of collective tastes, Blumer (1973) is at times vague in explaining how taste gets refined and what motivates actors' selections. Although he captures the essence of the fashion forecasting process by maintaining that ideas and innovations are being filtered and refined at various stages, he does not explain the 'filtering-criteria'. Similarly, he points to the importance of interaction between practitioners in establishing trends, yet we do not learn what guides practitioners to select one trend/idea over another. It is only once fashion innovators present design proposals to fashion buyers who select a number of garments, that Blumer explicitly draws attention to the underlying motivations of fashion practitioners' choices: namely fashion buyers' assumptions of what kind of garments will be well received by their customers.

Indeed, as we have seen in Chapters 5 and 6, there is ample evidence in the data that a shared customer image directs practitioners' selection processes throughout the fashion forecasting and garment selection stages. Thus, retailers not only aim to pitch their fashion level to correspond to that of their target customer group, but designers, buyers and merchandisers strive to anticipate customers' taste in terms of all other components that determine the shape and look of garments, i.e. in terms of colour, fabrics, cut, trimmings, etc. By arguing that fashion workers within one company have a shared image of their target customer we can give content to the abstract notion of the ordering principle and explain actors' underlying motivations in the selection process. Indeed, it has been argued that the notion of the ordering principle serves a similar function to Shibutani's (1955: 563) use of the concept of 'reference group', which he defines as a 'group whose perspective constitutes the frame of reference of the actor'. Applied within the context of this study, we can argue that the ordering principle provides individuals within a company, as well as the company's supplier base, with an overarching frame of reference, which guides practitioners' decision making processes both on an individual as well as collective level. Seen in this light, the ordering principle becomes yet another measure to cope with demand uncertainty.

Thus in addition to the previously discussed strategies to cope with demand uncertainty - i.e. flexible working and interfirm relationships, industry wide filtering strategies, sequential selection processes, differential promotion of garments (garment grading) and garment trails - womenswear retailers seek to establish, promote and reinforce a target customer image that is shared by all those involved in the selection processes, not only within the company but also among the company's

supplier base. To this end they employ independent market researchers, engage in the analysis of their sales data or regularly visit their retail outlets. Given that a shared customer image is seen as a strategy for coping with demand uncertainty, it is perhaps not surprising that practitioners refer to the importance of knowing one's customer particularly in times of crisis (Radway, 1997: 95).

### **The role of the customer image in key players' decision-making**

The data clearly suggest that fashion practitioners draw on a shared target customer image throughout the selection processes. In order to understand the function of the target customer image in key players' decision making an important question one needs to address is whether it can be seen as an institutional means to control and shape customers or as a measure to achieve customer satisfaction. Depending on its role in the selection processes one can make inferences as to whether fashion is co-produced by producers and consumers.

Drawing on Ang's (1991) arguments with regards to the function of images of the TV audience for broadcasting institutions, one could argue that retailers construct the customer image in an effort to gain control over consumers. Viewed from this angle the seeming intimacy between fashion practitioners and their customers merely disguises that the notion of the target customer - like the concepts of 'masses', 'nation', 'population' or 'audience' - is a socially-constructed, institutionally produced discursive construct that 'is taken-for-grantedly defined as an unknown but knowable set of people ... [and that] only exists as an imaginary entity, an abstraction constructed from the vantage point of the institutions, in the interest of the institutions' (Ang, 1991: 2). Although womenswear retailers have a more direct relationship with their customers than TV producers - after all they can see the women who are shopping in their outlets on a daily basis - the target customer fashion practitioners talk about is nonetheless an ideal type, not an actual individual. Indeed, as we have seen in Chapter 3, as soon as the direct relationship between customer and tailor was substituted by the ready-to-wear clothing system the notion of the individual customer was replaced by that of customer types.

Ang (1999: 7) suggests that while it is not important, perhaps even counter-productive, for cultural producers to develop a too detailed knowledge of their audience, having an ideal typical image of them is paramount, because it allows producers to enter into a relationship with the consumers of their products. In Ang's (1991) analysis the institution-audience relationship is not one based on equality, but rather on the institutions' need to gain control over their audiences as the following quote shows:

Institutional knowledge is driven toward making the audience visible in such a way that it helps the institutions to increase their power to get their relationship with the audience under control, and this can only be done by symbolically constructing 'television audience' as an objectified category of others that can be controlled, that is, contained in the interest of a predetermined intuitional goal. (Ang, 1991: 7)

Similarly Hartley (1987 in Ang, 1999: 3), for example, speaks of 'invisible fictions' of the audience that are used by producers to establish a sense of control over the audience. Seen in this light, knowledge of the customer enables intuitions to control consumers and to shape 'them into predicable markets' (Hagen, 1999: 144), thus ensuring the institutions' conditions of reproduction. From this vantage point, all forms of knowledge that fashion practitioners amass (i.e. through market research, sales data analysis, visits to shops, intuition, etc.) is purposeful knowledge – i.e. knowledge gained in order to sustain, recover or increase retailers' market share and hence safeguard the institutions' survival. This interpretative stance would suggest that fashion practitioners at the retailing level use the target customer image purely for commercial reasons, i.e. to select the most profitable ranges of garments, and not as a means of achieve true customer satisfaction by giving customers what they want. Thus, like the industry-wide filtering processes, which serve the purpose of restricting the theoretically endless choices and possible combinations of components to a workable selection of colours, fabrics, patterns, silhouettes, etc., the target customer image can be regarded as a powerful strategy to restrict customer choice and subsequently limit demand uncertainty.

As we have seen, narrowing down the pool of inspirational sources causes a certain degree of sameness among retailers, which is perceived not only as a threat but also as a kind of safety mechanism. Sameness, both within the product offerings of a company and between cultural producers, is also facilitated through another commonly used strategy to limit the impact of demand uncertainty, namely the analysis of sales data. Although sales data analysis can be construed as a means for getting a sense of 'what consumers want', this tactic is in fact unlikely to achieve real customer satisfaction, because it only caters for the majority taste, i.e. only those artefacts with the broadest appeal are repeated or copied while alternatives may become marginalized. Thus, rather than seeing selection processes on the basis of sales data analysis as instances of giving customers what they want, they may be more accurately described as a strategy to limit customer choice through the creation of aggregated customer groups.

Moreover, it can be suggested that, even if retailers sought greater differentiation between their product ranges, this does not automatically result in

greater customer satisfaction, because retailers always have to cater for customer groups and not for individuals. Writing about choice in the context of broadcasting services, Hellman (1999: 121) points out that providing consumers with more options does not guarantee that they will get what they want – at the most greater product offerings can be said to (i) increase the statistic probability of satisfying consumers' needs, (ii) allow consumers to discover their preferences through the act of choosing between alternatives, and (iii) give them a sense of control over their choices. What is more, Ang (1991: 6) is adamant in arguing that increased consumer choice ought not to be confused with consumer freedom, because this would 'ignore the fact that specific institutional arrangements engender powerful mechanisms that set limits to the way actual audiences can relate to the medium. Audiences can never be completely free, because they are ultimately subordinate to the image flow provided by the institutions.' This interpretation is similar to Hirsch's (1972: 649) claim that consumers' choices are merely a kind of 'rank ordering' of cultural artefacts that have been pre-selected by organisational and mass media gatekeepers.

This interpretive position of the producer-consumer relationship also refutes claims of consumer sovereignty through negative choices, i.e. by choosing not to buy certain commodities because, unless consumers completely opted out of the system - for instance by not buying any garments made by high street retailers - they are still contained within the larger parameters of the clothing system as a whole. For example, the 'non-consumers' who refused to buy garments from Marks & Spencer's 'grey range' caused significant problems for this particular company but, because they transferred their clothing choices onto other retailers, high street womenswear retailing as a whole was not hit with a sharp decline in consumer spending.

The fact that consumers make informed choices and do not simply buy whatever is on offer shows that, although institutions strive to contain consumers within economically useful categories, the battle for control is ongoing and can never be completely won. Indeed, it raises the question to what extent it is useful to portray the relationship between producers and consumers as one of opposition in which one party is seen as subordinating to the needs of the other. Although from an intuitional point of view it seems useful to regard the target customer image first and foremost as a category that has been established in order to control consumers, and not as an altruistic measure put into place to guarantee the greatest possible customer satisfaction, it is conceivable that the easiest way to achieve institutional control on the high street womenswear retailing level is by 'giving customers what they want' and thus establishing customer loyalty. This would suggest that a detailed knowledge of a company's target customer group not only serves the intuitional goal of securing

profit levels and market position, but also of satisfying customers' needs – to the degree that individual customer satisfaction can be achieved through the practice of catering for customer types.

Moreover, it is important not to forget that institutions are made up of individuals who may bring their personal or departmental agendas to bear on their decision-making processes. As we have seen in the discussion of the product image, practitioners do not simply follow a prescribed course of action, but have individual or occupational stakes that may influence their work. For example, it has been suggested that fashion workers do not passively adhere or completely succumb to the customer image. By emphasising differences in occupational outlooks and by showing that social actors can feel passionately about their work we not only open up room for conflict, but also for personal agency. As we have seen, even when practitioners claim that they are primarily basing their selections on the customer image there is evidence in the data that personal taste has some impact on actors' decisions. As we have seen Fine (1992), in his study of aesthetic choices and constraints in culinary work, argues that workers' decisions are not primarily guided by an organisationally approved 'product image', but are based on the workers' own standards of what constitutes good work. In similar vein, it can be suggested that fashion workers do not simply use the target customer image to make garments that will satisfy their companies' demand for profit, but that they also genuinely want to produce clothing that their customers will like.

This suggests that the ordering principle, unlike the product image, is not some absolute that dictates actors' every decision. Rather, it can be seen as a means fashion workers use to make sense of the wealth of information and competing ideas they are confronted with. Thus, by 'conjuring-up' the customer image, practitioners seek to process ideas and artefacts not through some abstract musings of what expresses the *Zeitgeist* or collective taste at the time, but rather by asking what will she, *our customer*, like. Indeed, listening to the language interviewees used to talk about *their* customer almost suggested that they were talking about a *specific* customer, a woman they personally know, and not some *composite* abstract. Although this is obviously not the case, one nonetheless gets a strong sense from the data of just how profoundly fashion workers strive to achieve customer satisfaction. One of the designers, for example, talked about not simply satisfying customers' wants, but using their aspirations as inspiration. This suggests a form of understanding between producers and consumers that goes beyond what is needed to merely create a saleable garment. Instead, fashion workers may transfer some of their

own passion for clothing onto their customers by seeking to provide them with, what they are hoping, are the best possible garments.

This attitude towards customers is reminiscent to the relationship between the editors of the Book-of-the-Month Club and their subscribers as described by Radway (1997). Radway suggests that selections of books are not merely based on whether or not they will sell well, indeed books that were felt to be too commercial were often rejected, but also by considerations whether books will provide readers with 'reading pleasure' – ideally even beyond the readers' expectations. The editors of the Book-of-the-Month Club thus acknowledged:

... pragmatically that they were in the business of selling books, ... they wanted to believe that, for the most part, people bought books because they wanted to read them ... because they had particular objectives in mind. The editors were happy to oblige by searching for volumes that would fulfil those goals ... However, they would reject books that might prove to be commercial successes *if* those books foreground too crudely their status as commodities ... They demanded that books declare their status as "literary" objects, that is, as objects rendered special by the fact that they were designed to be read. (Radway, 1997: 83-84, original emphasis)

This suggests that the Book-of-the-Month Club editors' own appreciation of good books, the multifaceted experience and relationships they can generate in the reader, meant that the mere act of selling books was not as important as selling books of a certain quality that could provide a pleasurable reading experience. Thus, editors subordinated purely commercial interests to their literary and aesthetic concerns – yet their book selections were not guided by their personal taste, but by perceptions what their imagined subscribers would like.

Although high street womenswear practitioners across the board were more clearly guided by commercial concerns, their passion for fashion ensures that ranges are moved forward, that not only the safest colours are bought or the cheapest materials are used. Indeed, one can argue that although profit making is the overriding aim of high street retailing its own intuitional structure, because it emphasises the collaboration of occupational groups with different outlooks, ensures that commerciality is not the one and only measure that is applied in the selection process. Despite numerous strategies to cope with demand uncertainty by controlling consumer choice there is a strong sense that the production of fashion on the retailing level is not simply dominated by the institutional needs of the producers and distributors to make profit. Instead, the data suggest that the individual agents who are responsible for creating the garment ranges, i.e. the designers, buyers and merchandisers, seek to combine the need to be commercial with their personal

ambitions to create garments that will satisfy their customers. Thus, similar to the editors in the Book-of-the-Month Club (Radway, 1997), fashion practitioners are not guided by their personal taste of what constitutes a desirable garment, but rather they bring their interpretations of what customers like and dislike to bear on their selection choices to achieve customer satisfaction as well as to create profitable garments. In this sense we could argue that fashion practitioners chose garments both on behalf of their company *and* their customers.

For these reasons it can be suggested that the co-production of fashion by producers and consumers takes place on two levels: firstly, through the institutional notion of the target customer image which serves the dual function of controlling and satisfying customer demand; and secondly, on the level of the individual fashion workers who transfer their own passion for clothing onto the customer with the aim of fulfilling *her* desires.

Yet, despite fashion workers' ambition to cater for the tastes of their various target customers, it has to be emphasised that the actual consumers themselves only exert an influence over the garments post sale, i.e. when they shape the garments they are wearing through their specific consumption practices. Although this implies that consumers do not play an active role during the production processes – it is the fashion workers' image of the customer and not the real person that influences their selection choices – it does suggest that consumers are active agents who influence the products that are on offer. Consumers shop around, re-contextualise and perhaps alter garments to suit their individual needs.

This observation implies that consumers, even if treated by the industry as customer types, could achieve individual fulfilment by choosing those garments that correspond best to their own taste. Moreover, it suggests that the extent to which consumers can be said to get what they want also largely depends on the relationship of consumers with the commodities they consume, i.e. the context in which they consume them and the expectations they are hoping to fulfil through the act of consumption. For these reasons, consumer satisfaction cannot simply be seen as something given or withheld on the part of the producers/distributors, but rather as something that is achieved by the individual consumer through the particular choices she makes.

Thus, we can argue that the co-production of fashion by producers and consumers extends into the realm of fashion consumption through the appropriation of garments by consumers and the garments' 'domestication' and integration into consumers' specific consumption practices. However, due to the nature of this study it is not possible to comment on the extent to which customers do feel satisfied by

the clothing offering of high street retailers. Further research both on consumers' perceptions of high street clothing and their consumption practices of these garments is needed to shed light on this issue.

This empirical investigation of the organisation of womenswear retailers' forecasting and garment selection processes and the insights it provides into how production and consumption practices intersect to influence the content and shape of womenswear makes a valuable contribution to our sociological understanding of fashion and the fashion industry. This study has lifted the lid on the culture of production of womenswear retailing through an in-depth analysis of the organisational structure of this industry. In so doing, it has highlighted:

- the existence of several types of womenswear retailers with different organisational structures;
- the need to look at retailers' differentiation strategies in order to appreciate the interplay between retailers' working practices and their target customer groups' clothes buying patterns;
- the interrelation between demand uncertainty and the self-referentiality of the womenswear industry;
- the organisation of the division of labour between designers, buyers and merchandisers on the fashion forecasting and garment selection level and the resulting differences in occupational outlooks between key players;
- the interplay between teamwork and conflict throughout the selection processes;
- the role of the target customer image as ordering principle that guides key players' decision making processes; and
- the extent to which fashion is co-produced by production and consumption practices.

The uniqueness of this research lends weight to its findings which, though far from being representative of the industry as a whole or able to offer a definitive base from which to make general inferences about other culture industries, nonetheless make important advances into an under-researched field and, as such, can provide a springboard for future research in this area.

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## Appendix A: Ready-Made Clothing And The Sweating System

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Traditionally, the making of clothing had been a skilled trade requiring at least a three-year apprenticeship with a master tailor. However, at the beginning of the nineteenth century, working conditions in the clothing trades began to deteriorate and gave rise to the sweating system, which first appeared in London's East End – the traditional fashion centre of Britain – in the 1840s or 1850s (Hall, 1962: 55). The changes in the clothing trade were associated with the large influx of cheap unskilled labour (women and Jewish, Irish and other immigrants) and the subsequent wage cutting which formed the basis of the sweating system. Although the system of subcontracting originally derived from the bespoke trades (Schmiechen, 1984: 28), the production of ready-to-wear clothing became synonymous with sweated labour – the subcontracting of work to outworkers.

The surplus pool of unskilled workers formed the underlying basis for the sweating system but it was the internal division of the clothes-making process into several distinct parts that allowed manufacturers to take full advantage of this cheap labour. Tasks were reclassified, for example, in terms of skilled or semi-skilled labour, and gender divisions were restructured within the labour process. For instance, pattern making and cutting were redefined as skilled labour and became male-dominated professions (Phizacklea, 1990: 27). Thus, male immigrants' attempted to preserve their masculinity and their social status within their families by redefining work as skilled that was formerly, when carried out by women, classified as semi-skilled (Phillips and Taylor, 1980: 85).

The transference of the sexual division of labour from the family to the workplace was principally responsible for the fact that women generally occupied low-wage, subordinate and auxiliary positions (Alexander, 1977: 78). They were predominantly seen as mothers and wives dependent on male relatives, both economically and legally, and not regarded as wage earners. Entering the labour market from this inferior social position weakened women's bargaining power significantly and provided the rationale for low wages and the exclusion of women from skilled craft guilds.

In the tailoring branch of the industry, the traditional 'whole garment' or 'making through' method, where 'the main assembly was undertaken by a single skilled worker (male), whilst less skilled operations, such as the sewing of button holes and pockets, were undertaken by assistants (men and women)' (Coyle, 1982: 13) was predominantly replaced by the section system. The introduction of the

section system is often credited to Jewish entrepreneurs who used this system in a bid to raise productivity levels and reduce production costs by breaking down 'skilled labour processes into their semi- or un-skilled component parts' (Alexander, 1977: 80). By limiting workers' skills to a minimum, the lengthy training processes that had been necessary under the 'whole garment method' were avoided and even unskilled workers could soon learn how to sew sleeves, cuffs or pockets. These changes in clothing production resulted in work previously carried out by one skilled worker now being done by a multitude of unskilled labourers. Tailoring, for example, was subdivided into 25 divisions by 1888 (Schmiechen, 1984: 28). Looking at the clothing industry overall, Bythell (1978: 68) argues that it was due to the practice of 'specialisation and subcontracting ... that powered factories, workshops, and genuine homework establishments could co-exist in it for decades'.

The section system was first introduced into the more standardised clothing sectors such as menswear and childrenswear since it was best suited to the production of cheap garments with little style, such as vests, trousers or children's suits (Hall, 1962: 59). While garments produced under the whole garment system were quintessentially unique, the section system brought standardisation into clothing production and was an 'incentive to mass production' (Morris, 1986: 109).

Despite the section system's origin in the more standardised markets of menswear and childrenswear Wray (1957: 32) points out that both the whole garment and sectional methods in use before the Second World War 'were highly adaptable to the short production runs and multiplicity of style required for the production of fashion garments'. Indeed, there is ample evidence that a variant of the section system, namely the master tailor system, had been employed by Jewish entrepreneurs, whose small workshops were organised around speedy and flexible production methods and who catered for the medium-quality, fashion-sensitive womenswear market by competing with the bespoke trades. There is therefore no justification for dismissing all forms of section work as inflexible and hence unsuitable for womenswear manufacturing. Nonetheless, it is true that this production method did not penetrate all sectors of the womenswear industry. According to Wray (1957: 30), for instance, the dressmaking branch of the industry continued to use the whole garment method even in the 1930s.

The vertical disintegration associated with the breakdown of the whole garment method and its replacement by the so-called section system gave rise to a great number of subsidiary trades, and increased the importance of companies specialising in activities such as cutting, pleating, button-holing/covering or pressing (Hall, 1962: 65). In addition, the trend towards specialisation encouraged by the

section system and the plethora of ancillary trades that had sprung up in its wake increased the volume of hand-finishing (Bythell, 1978: 69).

The actual manufacturing of ready-to-wear clothing was organised through a complex network of subcontractors. Subcontractors, also called middlemen or sweaters, took orders from wholesalers, drapers or manufacturers which they in turn gave out to numerous home- and/or outworkers, who often passed a portion of the work on to family members or neighbours. Thus, there may well have been three or four middlemen between the initial contractor and the worker; since workers competed by undercutting each others' wages, this system ensured that wages were minimal. The introduction of the sweating system in the mid-nineteenth century clothing industry of London's East End effectively reduced the wages of low-skilled female workers from 5s 9d per week in 1848 to 3s 2d in 1860 (Jones (1971: 109). It was only towards the end of the nineteenth century that middlemen were slowly withdrawing from the trade and wholesalers were either opening their own workshops or directly employing outworkers (Fraser, 1981: 177).

Manufacturing costs were further reduced by passing on overheads to outworkers. Typically, garment cutting, which required considerable skill and experience, would be done centrally by a wholesale clothier who put together bundles of garment pieces for the outworker to pick up and later deliver back to the warehouse. This system necessitated frequent and rapid contact between warehouse and outworker and meant that outworkers generally lived within relatively close proximity to wholesalers – hence the great concentration of clothing workers within certain districts (Hall, 1962: 39). Despite their relative closeness, outworkers nonetheless had to spend time and effort in getting to and from the wholesalers; no payment was made for the time spent travelling or for any transportation costs. Outworkers' slim earnings were further reduced by having to provide needles (and later, as we shall see, sewing machines), thread and trimmings as well as overhead costs (in the form of candles, coal, etc.) out of their own pockets. Alexander (1977: 104) cites the example of an old woman whose earnings of between 4s 6d to 5s per week were reduced to approximately 2s 3d or 2s 6d a week after she had paid the associated costs entailed by her work. On top of these costs, wholesalers imposed fines for the late return of garments and inferior quality of work.

Sweating was by no means restricted to the manufacture of cheap clothing, but was also a reality for those workers engaged in the production of clothing for the fashionable West End court dressmakers (Alexander, 1977: 105). Harsh working conditions, poor pay and ill health were the norm for homeworkers and those employed in small sweatshops. Henry Mayhew, a contemporary journalist and

chronicler, vividly describes the harsh working conditions (18-hour days) and poor health of the young female workers, who were often no more than 14 years old (quoted in Phizacklea, 1990: 25). In the introduction to his collection of letters (*Morning Chronicle*, 1848), which describe the plight of clothing workers, Mayhew confesses that:

I was unprepared for the amount of misery that I have lately witnessed. I could not have believed that there were human beings toiling so long and gaining so little, and starving so silently and heroically, round about our very homes. (cited in Bythell, 1978: 80)

Although the working conditions of the majority of clothing workers in advanced capitalist economies today have improved since then, the CAPITB Trust (2001: 28) maintains that the image of the industry in Britain is still 'that of the small, poorly equipped and badly managed "sweat shop" '. Despite the (perhaps) unjustified bad image of the clothing manufacturing industry in advanced capitalist economies, the industry as such still exploits cheap labour – the difference being, as shown later, that exploitation has now moved to the developing countries.

### **The sewing machine and outwork**

The effect of new sewing technology on the clothing industry stands in sharp contrast to similar technological developments in other manufacturing branches which facilitated the concentration and centralisation of workers in factories. At a time when the Industrial Revolution had firmly established the work/home barrier for many other manufacturing trades, the introduction of the sewing machine brought a new impetus to home-based dressmaking; however, although made at home, the clothes were predominantly for commercial, not private use. Thus, it can be argued that the sewing machine aided the spread of the sweating system.

Although the sewing machine was an essential component in the development of the nineteenth-century clothing industry and was a driving force in the spread of ready-to-wear clothing, the conventional view that it brought the Industrial Revolution to clothing manufacturing is questionable. Godley (1999: 255) makes the valid point that the group of workers who felt the impact of the sewing machine most dramatically were the vast number of homeworkers, and not those working in the (small number of) clothing factories. This is a view supported by Jefferys (1954: 293) who argues that the sewing machine consolidated, rather than undermined, the position of outworkers. Instead of abolishing old labour systems, it 'revolutionised the productivity of female waged work within the home' (Alexander, 1977: 96). The fact that this technology did not rely on outside energy sources, but

could be powered directly by the workers' hands and feet, meant that it was ideally suited to somewhere like London that was rich in labour power, but restricted in terms of space and fuel. As factory inspector Henderson reported in 1877, the sewing machine is well suited for the needs of the metropolis since it makes use of the dense population and turns them into 'a great manufacturing community ... the sewing machine gives all the advantages derived from a labour-saving device without the intervention of mechanical power' (cited in Hall, 1962: 52).

The paradoxical impact of the sewing machine on clothing manufacturing compared to that of technological innovations in other industries can be explained by the machine's characteristics which made it suitable for domestic use for several reasons: self-sufficient energy source, relative cheapness and small size. Up until the mid-1870s, the majority of sewing machine purchases were industry-led, i.e. made by people related to the clothing industry (Putnam, 1999: 262). However, realising the importance of the domestic consumer group and their weak economic position, Singer established a 'hire-purchase' scheme in 1856 for those who could not afford to buy a machine outright (Rouse, 1989: 249–50). There is evidence of some price flexibility for those depending on sewing machines to make a living. For instance, a memo from a company executive addressed to all UK agents demonstrates that agents need to procure different sums of money depending on whether customers are hiring machines for private or commercial use (Putnam, 1999: 261).

The sewing machine manufacturers' involvement in the expansion of outwork can also be seen in their quasi recruitment of unskilled labour through special training courses. As Schmiechen (1984: 26) points out 'the machine manufacturer often provided machining lessons, usually for a fee and the unpaid labour of the student'. Through advertising, hire-purchase and training schemes, sewing machines were aggressively marketed and pushed onto those whose economic situation would not otherwise have encouraged them to invest the little income they had in obtaining their own machine. Not surprisingly, there is much evidence that workers hitting economic hardship were forced to have their machines repossessed (Putnam, 1999: 261; Schmiechen, 1984: 27).

The accessibility of sewing technology increased the number of outworkers as well as the number of so-called 'small masters', i.e. small independent workshops run by, often Jewish, entrepreneurs. Thus, in 1888, Beatrice Potter's investigations of the clothing industry for Charles Booth showed that 901 Jewish tailoring workshops existed within the vicinity of Whitechapel, of which 76 percent employed less than 10 workers and only 1.6 percent had over 25 employees (Fraser, 1981: 176). Thus, Hall (1962: 54) is justified in claiming that, although the sewing machine

revolutionised the clothing industry at a technical and economical level, it did so without changing its basic structure because it needed so little capital in its implementation. One can therefore argue that the sewing machine discouraged large-scale manufacturing and was largely responsible for the use of sweated labour.

Thus, the main significance of the introduction of the sewing machine to clothing manufacturing was in terms of the possibilities it opened-up for the home production (amateur and professional) of womenswear rather than in terms of the mechanisation and automation of the industry. This point is further illustrated by the contrast between textile and clothing production. While the development of the power loom by Cartwright in 1785 fostered the centralisation and mass production of textiles (Rouse, 1989: 243), the sewing machine did not bring about a comparable mechanisation or automation of the clothing manufacturing process; on the contrary, Fine and Leopold (1993: 103), define the clothing industry as 'the highly capitalised production of materials and the pre-capitalist mode of final production'. In contrast to many other industries after the Industrial Revolution, mechanisation in clothing production did not result in vertical integration, with large-scale factories as the predominant site of production.

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## Appendix B: Research Letter (Buyers)

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[Date]

[Name and address of potential interviewee]

Dear [Name of Potential Interviewee]:

I am currently conducting research interviews with buyers, merchandisers and designers of women's outerwear in the High Street fashion industry. I am writing to inquire whether you and/or other members of your buying team would be willing to participate in this research project. [Name of Company] is an important part of the market segment that I am studying and your participation in my study is of great value. The aim of my study is to understand fashion forecasting and selection processes that are involved in distinguishing the potentially successful from the potentially less successful garments for retailing. I would like to talk about your particular role in these processes and your rationale for choosing or rejecting garments for production. Ideally, I would like to interview you and other members of your buying team- each interview is likely to last for about one hour. I appreciate that you are very busy and of course I am happy to fit around your work schedule in order to minimise any disruptions.

I am working at the Department of Sociology, The University of Edinburgh. My research is funded by the Economic and Social Research Council (ESRC) and will form the basis of a Ph.D. Although I am particularly interested in the processes involved in fashion forecasting and selection and not in the details of new fashion trends, I am sensitive to the need of confidentiality and I can guarantee that I will be the only person who has access to the interview material. I am also aware of the commercially sensitive nature of information disclosed to me and will not discuss this information with anyone else. Moreover, if you wish I will send you a transcript of the interview for editing. I can reassure you that all material used in my thesis will be coded in such a way as to ensure confidentiality, unless you or your company wishes to have their contribution publicly acknowledged.

Although the fashion industry is of great economic importance to Great Britain, it has so far been under investigated and my project will provide an important contribution to the understanding of the fashion industry. However, the success of this project depends on the goodwill of the participants and I should be happy to provide feedback of my findings in the form of progress reports and a short final report or presentation to your team as recompense for participating in my study. Your involvement in this research project would be greatly appreciated and I am certain that my findings will be of value to your company as well.

I would be very grateful if you decided to take part in my research. I will contact you by phone within the next two weeks. However, if you have any questions please do not hesitate to contact me by phone (0131 650 3988) or email ([s.schulz@sms.ed.ac.uk](mailto:s.schulz@sms.ed.ac.uk)). You can also get in touch with my supervisor, Dr. Nick Prior at the above address and phone number.

Yours sincerely, Susanne Schulz

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## Appendix C: Interviewing Guide (Designers)

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### Interviewee's Biography

1) Please tell me briefly about your career.

Where have you been working before and in which position(s)?

Which position do you currently hold?

2) What is your particular area of responsibility?

3) Who are the people that you directly work with:

within the company?

outside the company?

### Companies' Organisational Structure

1) How is your company organised:

how many departments?

how are the buying, merchandising and design teams structured?

2) Do you have an in-house design team?

How many garments in the range are designed by your in-house design team?

3) How would you describe your relationship to your suppliers' design- teams, i.e.

who chooses the designs from the suppliers?

4) How is your company's supply chain organised? Do you predominantly use UK,

Europe or Overseas suppliers?

5) Where do you position your company in the market?

Who are your company's competitors?

6) Who is your company's target customer group?

7) How would you describe the product image of your company?

8) Is your company design, buying or merchandising led?

## **Fashion Forecasting**

- 1) How does fashion forecasting get done in your company?
- 2) Are there people employed in your company whose primary role is to forecast trends?
- 3) Does your company use independent fashion forecasting agencies?  
Which ones?
- 4) What is your role in the fashion forecasting process?
- 5) How far ahead of the season do you work?
- 6) How many 'stories' do you choose originally?  
How many are there in the end?
- 7) Does it sometimes happen that individual designers in the team favour different trends?
- 8) Does it sometimes happen that design and buying teams favour different trends?
- 9) Do you go to trade fairs or fabric shows?
- 10) When you are designing garments who or what have you got in mind?  
The customer?  
Personal taste?  
Company's product image?

## **Garment Selection Process**

- 1) Please describe the most important stages of the garment selection cycle in your company.
- 2) What is your particular role in the garment selection process?  
Who are the other key players and what are their roles?  
Are the merchandisers involved in it?

3) Do design proposals undergo changes within the various stages of the selection process?

Who suggests these changes: other designers/ buyers/ merchandisers?

4) At the start of the selection process, how many items are there to choose from and how many are there in the final range of clothing?

### **Conflicts**

1) Within the forecasting and garment selection process, are there particular areas of conflict between the key players?

2) Do you think there is a difference between designers', buyers' and merchandisers' reasoning in the in the selection process?

How do these differences influence the selection process?

3) Is the selection of garments for production in your company based on team effort or the achievement of a single individual?

If so, whose?

4) Is fashion forecasting/ selection a democratic process?

5) Who makes the ultimate decisions?

In your experience, does this vary between companies?

6) Looking at the final range of garments that have been selected, do you normally agree with this final choice?

### **Technology/ Outlook**

1) Do you think that new technologies have accelerated the High Street fashion cycle?

2) How quickly can your company respond to new trends?

Re-order successful garments?

3) Do you analyse sales-figures?

What implications do they have on your decisions?

4) How long are the in-shop lives of garments?

5) In general, do you think the fashion industry's perspective of consumers has changed over the last decades?

How is this change in attitude reflected in the industry?

Can this change be seen in your company?

6) Where do you see the women's High Street fashion industry heading in the next few years?

Where do you see your own company?

7) In general, is there anything else you would like to add?

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## Appendix D: QSR4 NUD\*ST Coding Tree

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- (1) /Interviewees' Biography
- (1 1) /Interviewees' Biography /Gender
- (1 2) /Interviewees' Biography /University Degree
- (1 3) /Interviewees' Biography /Stages of Career
- (1 3 1) /Interviewees' Biography /Stages of Career/Current Position
- (1 3 1 1) /Interviewees' Biography /Stages of Career/Current Position/Duration of Current Position
- (1 3 1 2) /Interviewees' Biography /Stages of Career/Current Position/Main Area of Responsibility
- (2) /Company Structure
- (2 1) /Company Structure/Working Relationships inside Company (all)
- (2 1 1) /Company Structure/Working Relationships inside Company (all)/Designers
- (2 1 2) /Company Structure/Working Relationships inside Company (all)/Buyers
- (2 1 3) /Company Structure/Working Relationships inside Company (all)/Merchandisers
- (2 2) /Company Structure/Working Relationship outside Company (all)
- (2 2 1) /Company Structure/Working Relationship outside Company (all)/Designers
- (2 2 2) /Company Structure/Working Relationship outside Company (all)/Buyers
- (2 2 3) /Company Structure/Working Relationship outside Company (all)/Merchandisers
- (2 3) /Company Structure/Supply Chain
- (2 3 1) /Company Structure/Supply Chain/Suppliers' Supply Chain
- (2 4) /Company Structure/Departments of Company
- (2 4 1) /Company Structure/Departments of Company/In-house Design Team
- (2 4 1 1) /Company Structure/Departments of Company/In-house Design Team/Role of Suppliers in Design
- (2 4 1 2) /Company Structure/Departments of Company/In-house Design Team/Role of Retailers in Design
- (2 4 2) /Company Structure/Departments of Company/Split of Range
- (2 5) /Company Structure/Market Position and Main Competitors
- (2 5 1) /Company Structure/Market Position and Main Competitors/Target Consumer Group
- (2 5 1 1) /Company Structure/Market Position and Main Competitors/Target Consumer Group/Attitudes to Consumers
- (2 5 1 2) /Company Structure/Market Position and Main Competitors/Target Consumer Group/Attitudes to Retailers
- (2 5 2) /Company Structure/Market Position and Main Competitors/Product Image
- (2 5 2 1) /Company Structure/Market Position and Main Competitors/Product Image/Brand Awareness
- (2 6) /Company Structure/Design, Buying or Merchandising led
- (3) /Forecasting
- (3 1) /Forecasting/Inspiration (all)
- (3 1 1) /Forecasting/Inspiration (all)/Catwalk and Fashion Shows
- (3 1 2) /Forecasting/Inspiration (all)/Fabric and Trade Shows
- (3 1 3) /Forecasting/Inspiration (all)/Other Retailers and Buying Trips
- (3 1 4) /Forecasting/Inspiration (all)/People in the Street
- (3 1 5) /Forecasting/Inspiration (all)/Celebrities and Media
- (3 1 6) /Forecasting/Inspiration (all)/Magazines and Internet
- (3 2) /Forecasting/Fashion Forecasting Agencies
- (3 2 1) /Forecasting/Fashion Forecasting Agencies/Forecasting In-house: Designers

- (3 2 1 1) /Forecasting/Fashion Forecasting Agencies/Forecasting In-house: Designers/  
Buyers' Role
- (3 2 1 2) /Forecasting/Fashion Forecasting Agencies/Forecasting In-house: Designers/  
Merchandisers' Role
- (3 3) /Forecasting/Ahead of Season
- (3 3 1) /Forecasting/Ahead of Season/Speed & Fashion Leader
- (3 4) /Forecasting/Colour Palette
- (3 5) /Forecasting/Story Boards and Stories
- (3 6) /Forecasting/Design Process
- (4) /Selection
- (4 1) /Selection/Stages (all)
- (4 1 1) /Selection/Stages (all)/Basic
- (4 1 2) /Selection/Stages (all)/Fashion
- (4 2) /Selection/Design-led Company (all)
- (4 2 1) /Selection/Design-led Company (all)/Designers' View (all)
- (4 2 1 1) /Selection/Design-led Company (all)/Designers' View (all)/on Designer's Role
- (4 2 1 2) /Selection/Design-led Company (all)/Designers' View (all)/on Buyer's Role
- (4 2 1 3) /Selection/Design-led Company (all)/Designers' View (all)/on Merchandiser's Role
- (4 2 1 4) /Selection/Design-led Company (all)/Designers' View (all)/on Supplier's Role
- (4 2 2) /Selection/Design-led Company (all)/Buyers' View (all)
- (4 2 2 1) /Selection/Design-led Company (all)/Buyers' View (all)/on Designers' Role
- (4 2 2 2) /Selection/Design-led Company (all)/Buyers' View (all)/on Buyers' Role
- (4 2 2 3) /Selection/Design-led Company (all)/Buyers' View (all)/on Merchandisers' Role
- (4 2 2 4) /Selection/Design-led Company (all)/Buyers' View (all)/on Supplier's Role
- (4 2 3) /Selection/Design-led Company (all)/Merchandisers' View (all)
- (4 2 3 1) /Selection/Design-led Company (all)/Merchandisers' View (all)/on Designers' Role
- (4 2 3 2) /Selection/Design-led Company (all)/Merchandisers' View (all)/on Buyers' Role
- (4 2 3 3) /Selection/Design-led Company (all)/Merchandisers' View (all)/on Merchandisers'  
Role
- (4 2 3 4) /Selection/Design-led Company (all)/Merchandisers' View (all)/on Suppliers' Role
- (4 3) /Selection/Design and Buying led Company (all)
- (4 3 1) /Selection/Design and Buying led Company (all)/Designer's View (all)
- (4 3 1 1) /Selection/Design and Buying led Company (all)/Designer's View (all)/on  
Designer's Role
- (4 3 1 2) /Selection/Design and Buying led Company (all)/Designer's View (all)/on Buyer's  
Role
- (4 3 1 3) /Selection/Design and Buying led Company (all)/Designer's View (all)/on  
Merchandiser's Role
- (4 3 1 4) /Selection/Design and Buying led Company (all)/Designer's View (all)/on  
Supplier's Role
- (4 3 2) /Selection/Design and Buying led Company (all)/Buyers' View (all)
- (4 3 2 1) /Selection/Design and Buying led Company (all)/Buyers' View (all)/on Designers'  
Role
- (4 3 2 2) /Selection/Design and Buying led Company (all)/Buyers' View (all)/on Buyers'  
Role
- (4 3 2 3) /Selection/Design and Buying led Company (all)/Buyers' View (all)/on  
Merchandisers' Role
- (4 3 2 4) /Selection/Design and Buying led Company (all)/Buyers' View (all)/on Supplier's  
Role
- (4 3 3) /Selection/Design and Buying led Company (all)/Merchandisers' View (all)
- (4 3 3 1) /Selection/Design and Buying led Company (all)/Merchandisers' View (all)/on  
Designers' Role
- (4 3 3 2) /Selection/Design and Buying led Company (all)/Merchandisers' View (all)/on

## Buyers' Role

- (4 3 3 3) /Selection/Design and Buying led Company (all)/Merchandisers' View (all)/on Merchandisers' Role
- (4 3 3 4) /Selection/Design and Buying led Company (all)/Merchandisers' View (all)/on Suppliers' Role
- (4 4) /Selection/Buying Samples
- (4 5) /Selection/Modifications
- (4 5 1) /Selection/Modifications/Narrowing- down Ideas
- (4 6) /Selection/Teamwork
- (4 6 1) /Selection/Teamwork/Last Say
- (4 7) /Selection/Missing Trends & Misjudgements
- (4 7 1) /Selection/Missing Trends & Misjudgements/Repeat Orders
- (4 8) /Selection/Buying Grid
- (4 8 1) /Selection/Buying Grid/Grading of Stores & Range
- (4 9) /Selection/Range Co-ordination
- (4 10) /Selection/Limitations of Innovations
- (4 11) /Selection/Minimising Risks and Taking Risks
- (4 12) /Selection/Intuition and Creativity or Structure
- (4 13) /Selection/Unpredictability
- (4 14) /Selection/Motivations
- (5) /Conflicts
- (5 1) /Conflicts/Design-led Company (all)
- (5 1 1) /Conflicts/Design-led Company (all)/Designers
- (5 1 2) /Conflicts/Design-led Company (all)/Buyers
- (5 1 3) /Conflicts/Design-led Company (all)/Merchandisers
- (5 2) /Conflicts/Design and Buying-led Company (all)
- (5 2 1) /Conflicts/Design and Buying-led Company (all)/Designers
- (5 2 2) /Conflicts/Design and Buying-led Company (all)/Buyers
- (5 2 3) /Conflicts/Design and Buying-led Company (all)/Merchandisers
- (5 3) /Conflicts/Self-positioning
- (6) /Technology
- (6 1) /Technology /Analysis of Sales
- (6 1 1) /Technology /Analysis of Sales/Influence on Buying Decisions
- (6 2) /Technology /Changes of Stock
- (6 3) /Technology /Exclusivity and Threats to
- (6 4) /Technology /In-shop Lives of Garments
- (6 5) /Technology /New Technologies
- (6 6) /Technology /Future
- (6 7) /Technology /Wholesale and Salesmen
- (6 8) /Technology /Other Observations

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