

THE EVOLUTION OF THE CATWALK: WHAT ARE THE IMPACTS THAT ARE CHANGING THE FUTURE OF THE CATWALK?

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ABSTRACT

This dissertation aims to explore the evolution of the catwalk and identify what are the factors that are impacting change to the future of the catwalk.

The dissertation found growth in the luxury sector and the success of the theatrical catwalk events. However, uncertainty to how well it is performing was under question. The events have increasingly become costly which has put pressure on up-coming designers to look elsewhere.

Sustainability was identified as a factor, as the rise in uncertainty for the future has made consumers more aware of their consumptions. The movement of Extinction Rebellion and consumer tribes has pushed this issue, with brands having to take responsibility; there has already been cases of this as well as the development in sustainable innovative alternatives such as digital catwalks.

The historical context revealed the front row consumer has adopted and changed over the years. With the rise of influencers driven by social media platforms and introduction of the general public, it is under risk of the exclusivity of these events being lost. The growth in influential power of Millennials and Generation Z mean brands need to focus on the consumer needs of these groups and revise their marketing strategies

Technology was identified to be the greatest factor of impact on the catwalk's future. With the growth of the sector and advancement in software's and programmes such as 5G, artificial intelligence and 3D printing more digital sustainable alternatives have risen. Technology will help develop the catwalk yet, could also erase the production of the fashion events for the development of digital and virtual catwalks.

To conclude, many factors were identified that are impacting change for the future of the catwalk such as sustainability, technology, costings and the rise of consumer groups; Millennials and Generation Z. All of these factors are contributing to how the catwalk will perform in the future, some of the factors are currently, while others have been identified as future impactors. The findings will give support to brands, designers and consumers for how they will have to adapt to this; allowing deeper insight into the factors which impact the catwalk both negatively and positively.

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GLOSSARY OF TERMS

Artificial intelligence -	The study of how to produce machines that have some of the qualities that the human mind has, such as the ability to understand language, recognize pictures, solve problems, and learn. Abbreviation: AI (Dictionary.cambridge.org, 2019)
Augmented reality -	An enhanced image or environment as viewed on a screen or other display, produced by overlaying computer-generated images, sounds, or other data on a real-world environment. Abbreviation: AR (Dictionary, 2019)
Brexit -	Used to refer to the departure of the United Kingdom from the European Union (Oxford Learners Dictionaries, 2019)
Catwalk -	An event used to present the latest designer collections to an audience (Author’s own, 2019)
Digital Revolution -	An era of digital electronic equipment that started around the 1980s and is continuing. The widespread diffusion of telecommunications and computer technology that is creating entirely new ways of working and socializing as well as challenging (Fields, 2018)

Extinction Rebellion -	Is an Environmental campaign group that launched in 2018 to protest and challenge the government regarding environmental concerns. Abbreviation: XR (BBC NEWS, 2019)
Fashion Calendar -	Refers to the time that the main fashion shows are held, this helps schedule and manage the fashion events that forecast the future trends. (Author’s own, 2019)
Front row -	This term refers to the front row at the catwalk fashion events. Normally you would see the seats reserved for the highest names in fashion and often reflects the status of the person sitting there (Author’s own, 2019)
Generation Z -	The generation born in the late 1990s and early 2000s. Abbreviation: Gen Z (Dictionary, 2019)
Greenwashing -	Behaviour or activities that make people believe that a company is doing more to protect the environment than it is (Dictionary Cambridge, 2019)
Influencers -	A person who is paid by a company to show and describe its products and services on social media, encouraging other people to buy them (Dictionary Cambridge Org, 2019)
Instant gratification -	Instant gratification is the desire to experience pleasure or fulfilment without delay or deferment. It’s when you want it; and you want it now (Patel, 2014)
LFW -	London Fashion Week
Micro-influencers -	Micro-influencers are individuals that have between 1,000 to 1,000,000 followers/audience members and are considered experts in their respective niche (Impact, 2019)
Millennials -	Generation born in the 1980s and 1990s (Dictionary Cambridge Org, 2019)
NYFW -	New York Fashion Week
Over-consumption -	Excessive consumption or use of something (Merriam-webster, 2019)

INTRODUCTION

AIM : This dissertation aims to explore the evolution of the catwalk and to determine what are the factors impacting change to the future of the catwalk.

- Objective One:**
To explore the historical evolution of the catwalk
- Objective Two:**
To analyse if the rise in sustainability has had any impact on the catwalk
- Objective Three:**
To investigate the associated consumer groups and if this has impacted the future of the catwalk
- Objective Four:**
To analyse if the development of technology has affected the movement of change on the catwalk

With the movement of change spreading across the catwalk, the main goal of this dissertation is to identify what are the key changes that have impacted how the catwalk proceeds to function and the future of these events. Three influential ‘trends’ have been identified through research, these being sustainability, technology and consumers they will be explored further during the dissertation.

Within the first chapter, the dissertation will focus on the historical context of the catwalk and how it has evolved; this will lead to how the future of the catwalk could look.

Chapter 2 will discuss how the forefront issue of sustainability is impacting the catwalk industry with Stockholm fashion show cancelled this year for a more sustainable option and New York Fashion week condensing from 7 to 5 days (Brown and Whelan, 2019), this questions the future of sustainability within the catwalk.

While other key impacts will find if there is a connection to the shift in consumer behaviour and the catwalk. The shift in consumer’s buying journey and has this been considered and implemented into the catwalk, “Fashion week is dying because it has zero relevance to the way modern shoppers buy stuff” (Jennings, 2019).

Chapter 4 will explore the growth in technology correlating to the catwalk, “With technology growing where its broadcasted, the traditional fashion calendar is struggling, the time is ripe for changed in our market” (Stott and Walker, 2017). The chapter will discuss if the future of technology is impacting the catwalk.

This study is the author’s personal career motivation as interests and passion in marketing and an events career, the research will give an insight into the industry and could offer future recommendations that could be used for forthcoming events.



Figure 1

METHODOLOGY SECONDARY



BOOKS

A Front Row Seat by Kirstin Sinclair 2011

To help understand the evolution of who attends the catwalk events and why, this led research into the consumer chapter.

The Fashion Set: The Art of the Fashion Show by Federico Poletti 2016

For the historical context of the fashion show used in chapter 1, as well as examples of case studies that have created memorable catwalk shows.

WEBSITES

‘Is fashion week no longer in fashion?’ - Fashion United 2019

Offered great understanding and observations into the change and consumer of fashion week, as well as statistics based on engagement in the events, this was used in chapter 1.

‘Glitz, Glamour & Garbage: Why fashion week needs to clean up its act’ Business of Fashion 2019

Assisted the sustainability chapter by offering the truth behind fashion events. One of the few articles that discussed the sustainability on the running of behind the events, not just the designers and their collections.

FILM

Film ‘Ingrid goes west’ Directed by Matt Spicer 2017

Based on the idea of social media and how it affects us. The film shows the loneliness and toxic side of social media and the plead for connection.



REPORTS

‘The biggest trends currently shaping the market’ -Marketline 2019

Gave leading players for the luxury industry with figures, as well as discussing the consumer of luxury products; this highlighted the shift in consumer and that Millennials and Gen Z are becoming increasingly affluent.

‘Fashion Sustainability 2019’ and ‘Could renting be the future of the fashion industry 2019’ - Mintel

These reports indicated that changes are happening within the fashion industry regarding sustainability. Issues such as consumer change, sustainable options and alternatives are within the report; this indicated chapter 2.

‘How AI is creating the future of fashion’ and ‘Are deep fakes the future of personalised advertising?’ – LSN 2018

Discussed the future of how the catwalk could be with technology involved, including a ‘virtual catwalk’, this lead on to primary research from both of these innovators.

VIDEOS

‘Deloitte Digital predictions 2019- the Deloitte consumer review’ video

Emphasised the key trends of the rise of 5G and the democratisation of artificial intelligence. The video discussed the impact on brands and consumers with these trends.

A video ‘Innovation on-trend’ – NYFW 2019

Marcus Wainwright gave wider research and data regarding Rag&Bones return to the catwalk, adding insightful quotes about the catwalk industry.

Questionnaire

The aim of this primary research was the see the values and consumer behaviour thoughts from Millennials and Generation Z. A questionnaire was published through survey monkey and shared via the researcher’s social media sites such as Instagram and Facebook. This offered wide scope to target the consumer, as research found they are high engagement users of these apps.

The target audience was between 16- 38+ years old with a mix of both genders. The survey was answered by 75 respondents. The questionnaire offered both quantitative and qualitative data which was used within the report.

The limitations of this research method:

- 50% of respondents were 18-24-year-olds, this could give a biased view from this consumer group.
- Gender wasn’t specified in the survey, which could mean that one gender has completed the survey more, meaning the results could be gender-biased.



Interviews

Name	Company / Profession	Interview type	Information gained	How was it recorded	Limitations
Emily Broughton	Sustainable activist- Runs ‘saving-the-grace’	20- minute semi-structured phone call interview	Qualitative information- direct quotes used in the report	Audio recorded then transcribed verbatim	Has the potential to go off track and on-to another subject. Also, can’t read the respondent’s body language to see how they feel about the subject
Kerry Murphy	Founder of The Fabricant	Written via LinkedIn with a structured approach	Qualitative information- direct quotes used in the report	Written	As it was through email, this limited the communication between the interviewer & respondent, the approach didn’t allow leading answers

Observations at a Fashion Event

The researcher attended Graduate Fashion Week and used an unstructured observation approach with a disguised observation. The reason for this primary research was to see how attendees of the catwalk show acted and whether phones and influencers had a presence (see appendix 5)

Limitations:

- Was only observed through 2 fashion shows, this offers a wider scope to observe a larger sample size various times to see if this was an occurring result.



Figure 5

Focus Group

A focus group of 3 male and 3 females aged between 18-34 was conducted. The aim was to add further research from the questionnaire to see if the consumer values compared to the consumer groups. In total, 6 semi-structured questions were asked.

Limitations:

- Transcribe directly during focus group taking place, could restrict lengthy answers as limited to how much was written down. To eliminate this factor, audio recorded should have been used.

Participant 1:	Female / Age 18
Participant 2:	Female / Age 23
Participant 3:	Female / Age 34
Participant 4:	Male / Age 19
Participant 5:	Male / Age 24
Participant 6:	Male / Age 32

CHAPTER ONE

1.1 EVOLUTION OF THE CATWALK

In the chapter that follows, it will define the market of luxury goods and find the correlation to the catwalk events, including historical context and case studies of brands performing at the fashion events.

The timeline shows how the idea and production of the catwalk evolved.



EARLY 1900'S
High end designers employed in house mannequins to display and model designs to elite clientele.



1918
An increase in foreign buyers attending the fashion parades, which had fashion shows fix two dates a year, so foreign buyers knew when to attend and found it easier. This process formed fashion week.



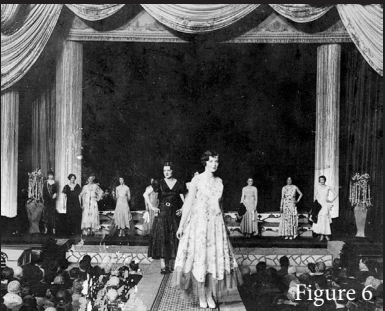
1960
The format of the fashion shows changed, it started to revolutionised. The decline in Couture meant the catwalk embraced the youth culture and start creating collections for the mass consumption.



2000
Controversary rose over the sizes of the models that fashion brands were used, size 0 was commonly seen and had a negative impact on the consumers and models themselves

LATE 1800/ EARLY 1900'S

Brands employed women to wear the collection out in public, to be noticed and photographer to circulate in the media. 1850 is the year, Charles Worth was establish. This year "is believed to be the first time that the sale of textiles and the art of dressmaking were brought together. Potential clients would come to Worth and, instead of approaching him with their own ideas for a dress, they would pick from a group of existing designs that would then be altered to their particular measurements and requests. This change the future of how the fashion operated.



1908-1910

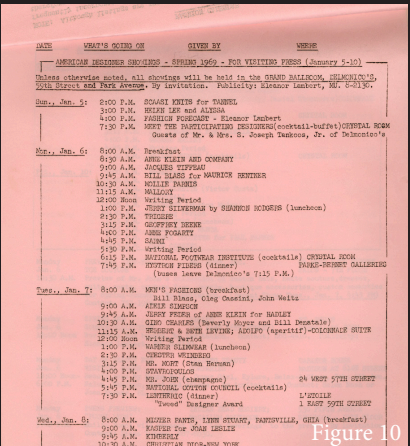
Scheduled fashion shows 'fashion parades' become a popular event. The events would last up to 3 hours which was repeated every day, over several weeks.



1945 - 1947

In 1945 Ruth Finely found the 'fashion calendar' a publication listing all the fashion events in New York City.

1947 saw the shows being published by having seated audiences with journalists and buyers in the front row.



1980- 1990

The production of the catwalk changed to become more theatrical; exotic locations, a radical props were introduced. This started to blur the lines between art and fashion



2019

The catwalk is seeing more diverse range of models present at the catwalk. The catwalk is including technology more within the shows to compete with competitors.



1.2 THE LUXURY SECTOR

As a whole, the luxury sector is seeing growth with €920 billion in 2018 and annual expectance to grow by 4-5% until 2025 (Altagamma, 2019).

The personal luxury goods market consisting of apparel, beauty and handbags reached a record high of €260 billion representing 6% growth, now representing 10% of all luxury sales (Bain & Company, 2018). In correlation to this, “consumer spending on clothing and accessories rose by 5.3% to £60.8 billion in 2018” (Mintel, 2018).

There are threats to the British luxury sector as with the uncertainty of Brexit, the sector could make a loss of £6.8 billion if a no-deal Brexit is passed. Currently, 80% of luxury fashion goes overseas with Europe being the largest market (Faulconbridge, 2019).

A change in consumers is shifting the luxury market, with ‘Millennials and Gen Z increasingly affluent’

(Marketline, 2019). Consumers are shopping less, with 33% of luxury consumers only shopping once a year or less (Mintel, 2017), this will be explored in chapter 3. This could be influenced by the ‘growing demand for sustainable luxury’ as discussed in chapter 2 (Marketline, 2019).

Buying a luxury product creates an emotional attachment, on the Maslow’s Hierocracy of Needs (Leavitt, Pondy and Boje, 1989) the achievement of esteem where you feel confident and respected by others can be found when purchasing these products. “66% of Luxury buyers think owning the luxury goods is a confidence boost, while 56% think owning the good makes you stand out from the crowd” (Dover, 2018).

Overall, the data suggests that luxury brands need to stay consistent with their core values to keep the consumer emotionally attached to the brand and their products.



Figure 16

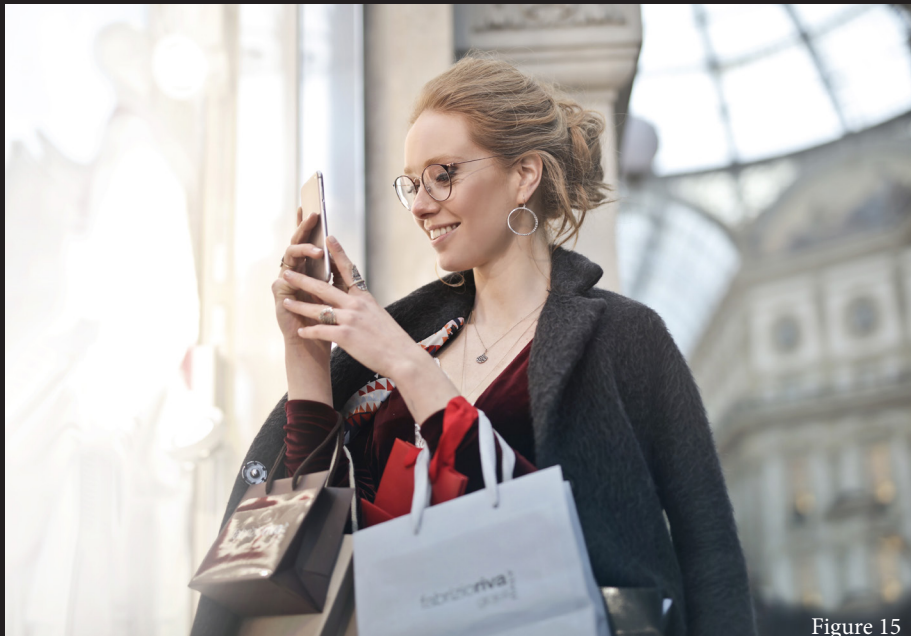


Figure 15

**LUXURY IS DEEMED
AS 'A STATE OF GREAT
COMFORT OR ELEGANCE,
ESPECIALLY WHEN
INVOLVING GREAT
EXPENSE'**

[THE LUXURY SPIRITUAL, 2018]

1.3 THE CATWALK WITHIN THE LUXURY SECTOR

“The catwalk was considered to be a selling mechanism where designers exhibit their creations, however, they have evolved to become as much part of the spectacle and branding as the clothes themselves” (Poletti and Cantarini, 2016). The trickle-down theory (Kaiser, n.d.) applies to the catwalk, with the exclusivity of the luxury market and the high-profile events influencing the general public.

In recent years a trend of making the catwalk more than just a catwalk has emerged. The set designs have a bigger impact, with there being an increase in catwalk shows across the calendar, brands are trying more than ever to stand out from the crowd (British Fashion Council, 2019) and to create a desire for their collection (Idacavage, 2018). The shows have become more of a performance with obscure locations, including music artists and their set design. Angela Ahrendts quoted “we are no longer in the business of fashion; we are in the business of entertainment” (Harris, 2014).

The above shows how the production of the fashion events have evolved over years to order for the shows to stay relevant and desired, which continues to result in the trickle-down theory being applied; resulting in the success of the luxury market.

The next sub-heading will showcase brands that have used this entertainment theory to create memorable shows.



Figure 17



Figure 18



Figure 19



Figure 20

1.4 CASES OF BRANDS ON THE CATWALK

Year	Brand	Show	What Happened?
2001	McQueen	S/S Voss	Set in a mental-hospital holding cell with mirrored walls. The end, a portly nude woman, her face covered by a mask, breathing through a tube, surrounded by fluttering moths was revealed, in the inspiration of Francis Bacon via Leigh Bowery and Lucien Freud (Vogue, n.d.).
2008	Fendi	Great Wall of China	The world's longest-running runway show along the ancient 1,500-mile-long Great Wall of China, costing \$10 million and an inclusive guestlist (Vogue, 2007).
2012	Chanel	S/S Haute Couture show (Jet)	Transformed the interior of Paris's Grand Palais into a private jet. Chanel besuited guests appeared delighted as they walked through the metal walkway and circular lounge to their airline seats. Drinks were served from silver trolleys, all beneath a blue sky projection scattered with clouds (Frankel, 2012).
2015	Chanel	Couture A/W (Casino)	A casino scene inside the Grand Palais, complete with Chanel muses Julianne Moore and Kristen Stewart trying their hand at poker while models showcased the collections (Harper's BAZAAR, 2019).
2017	Tommy Hilfiger	S/S 2017 Tommyland	Temporary beachside theme-park filled with branded carnival rides, Hilfiger clothing pop-ups, food trucks and virtual stylists (O'Malley, 2017).
2018	Phillip Plein	A/W 18 UFO Artificial show	A UFO that hovered over a space filled with artificial snow delivered Irina Shayk to a real robot, who then serenaded her with Frank Sinatra's Fly Me to the Moon surrounded by Batman-style snowmobiles filled with music and live rapping (Christian Madsen, 2018).
2019	Rihanna	Savage/ Fenty show	The exclusive show that was streamed through Amazon Prime saw the top models there with live performances from Big Sean, Halsey and more (Gardner, 2019).



The Evolution of the Catwalk: What are the impacts that are changing the future of the catwalk?

1.5 THE CATWALK

DECLINE OR INCLINE?

Is having catwalk events still a useful marketing tool for brands?

Brands such as Alexander Wang chose not to attend NYFW to align closer to the pre-collection schedule (Yotka, 2018). Calvin Klein also closed their luxury collection as it was the most expensive part of their business. They are now focusing on their other collections (Friedman, 2019) and swapping around the idea of the halo effect. Rag & Bone left the catwalk for 3 years as Marcus Wainwright said, “it felt very formalised, we were trying to innovate but it did not feel relevant” (New York Fashion Week, 2019) This shows the ever-changing schedule of the catwalk events, brands want change, but when it is not implemented, they look elsewhere.

In contrast to this, brands are still successful throughout the fashion calendar weeks, at LFW season it is estimated over £100m orders are placed (British Fashion Council, 2019) and with the digital revolution, brands are getting exposure. The Launchmetrics survey has suggested “we will not say goodbye to them anytime soon” (Luxury Lifestyle Magazine, 2018).

From the data it is evident that the catwalk is still a successful marketing tool for brands both concerning profit and exposure, however, change is prominent and for the catwalk to succeed it needs to adapt to this change.

With the consumer's view and engagement in mind, Launchmetrics developed a 'Media

Impact' algorithm study, they found that during fashion week brands receive up to 800% more online mentions than the rest of the year (Wightman-Stone, 2018).

On the contrary, the research found that 'consumer interest in global fashion weeks has fallen significantly over the last five years', taking into account 17 million Google searches over the last five years relating to the 4 main fashion weeks (Adegeest, 2019)

This research suggests that consumers are starting to feel disengaged with the catwalk as around the fashion calendar interest is being lost as a whole, however, during the high fashion season engagement rises. It is showing more than ever, that for brands it is hard to keep the consumer's attention and engagement. Brands need to continue as much engagement whether this is through social media platforms or fashion events to be seen as successful.

Pressure on designers can come from the costings to commit to creating a catwalk; this is discussed within the following chapter.



Figure 29



Figure 30

**“BRANDING WORKS TO
CREATE EMOTIONAL
CONNECTION BETWEEN
CUSTOMERS AND THE
BRAND”**

(POSNER, 2011)

1.6 COSTINGS

Questions to whether there is still value in the catwalk are being raised. Many catwalk shows cost over £1 million to host, especially for bigger named brands (Luxury Lifestyle Magazine, 2018). It is under question if their money is well spent on a 10-15-minute catwalk. Under the influence of digital technology made available to consumers, they can see the latest collections almost instantly on social media sites (see chapter 3 in-depth research).

These costings can restrict young emerging designers, “the going rate to be included in fashion catwalks start from £100,000” (Harris, 2014). New designers do not have this capital to fund the shows, resulting in new designers looking for alternatives either at smaller fashion events.



Figure 31

17

CONCLUSION

To conclude, it is clear the catwalk has evolved to become a marketing tool which does not just showcase the collections but also the imagery, thoughts and story behind it. Nonetheless, it is shown to put pressure on designers especially up-coming designers who cannot afford the production on these events. It is unclear whether the catwalk is in decline or incline as research suggested that the catwalk is not declining but more embracing the changes which need to be made, these will be discussed further within the report.

CHAPTER TWO: SUSTAINABILITY

This chapter is set out to explore the impact sustainability is having on the catwalk industry and if this has driven change, as well as finding sustainable options for the future of the fashion events.



Figure 32

**“THE WORLD IS CRYING
OUT FOR CHANGE AND IT
IS OUR RESPONSIBILITY
TO ACT NOW”**

STELLA MCCARTNEY (FASHION UNITED, 2019)

2.1 THE MARKET OF SUSTAINABILITY

It is estimated that nearly as much as one- quarter of the material fashion manufacturers purchase are wasted each year (Hughes,2019).

With the drive of sustainability at the forefront of not only the fashion industry but every industry, it is not surprising that consumers are becoming more aware. Partly driven by press headlines and TV documentaries such as Sir David Attenborough's Blue Planet (Baram, 2019) and Stacey Dooley's Fashion's Dirty Secrets.

“Designers are feeling pressure to make a ‘wow’ factor on collection instead of focusing on the ethical process” (Authors own, 2019) (Appendix 3). However, it is not just the brands and designers that need to consider sustainability but also the event hosts, during LFW 2019 there were ‘54 catwalk shows, 32,000 car miles and 20,000 cups of espresso’ (Kent, 2019). During these ‘events people travel across the world adding to the take on the climate change, as well as the show sets mainly used once then sent to landfill, goodie bags full of disposable samples and the clothes themselves including the packaging they have been sent in’ (Kent 2019).

Extinction Rebellion activist Tolly Dolly Posh said “If we’re talking about fashion week, I don’t think the term sustainability can be applied. Yes, designers can be sourcing their fabrics from more sustainable suppliers, but is it sustainable to be advertising collections for future seasons when the future of the planet is so uncertain... often produced in such unsustainable ways” (Author’s Own, 2019) (See appendix 4)

Nick Marks founder of sustainable production company Ecobooth agrees to state “**Events are temporary, but the waste you leave behind is not**” (Kent, 2019).

This goes to show that the sustainable side of events is not always considered, hence, the issue is not being tackled. Both the designers and events hosts need to be held responsible for these changes and action needs to be made to make these events sustainable.



Figure 33



Figure 34

2.2 THE MOVEMENT OF EXTINCTION REBELLION



Figure 35



Figure 36

World-wide activism has encouraged the discussion and fight for the future. One of these being Extinction Rebellion (XR) that launched in 2018, the activist movement wants the government to declare a 'climate and ecological emergency' and action to take on this change (BBC News, 2019)

Before London fashion week (LFW) commencing, XR petitioned to the British Fashion Council to stop the event, this was unsuccessful. During LFW, Extinction Rebellion protested outside with a "funeral procession closing off the week to mark the industry's effect on the planet and the lives lost to the crisis" (Harman and Barnes, 2019). The activists believe that "During fashion month, the industry travels to global destinations to parade, see and buy fashion [and] it creates the desire that results in the consumption of fashion and beyond" (Nast, 2019).



Figure 37

A survey conducted with the general public found that 51% agreed with the above statement (Authors own, 2019). This suggests that people are becoming more aware of the state of the fashion industry and that XR is taking this movement to new heights. XR are mirroring a significant amount of opinions and values that the general public can agree with, especially with younger generations.

2.3 BRANDS THAT ARE SHOWCASING SUSTAINABILITY

Small changes are being made to try and make the industry sustainable, for example in 2019 a campaign was implemented to encourage London based industry leaders and brands to SWITCH to a green supplier by 2020. Encouraged by the British Fashion Council and Vivienne Westwood the SWITCH campaign has seen improvements by 125K tonnes of CO2 emissions avoided (British Fashion Council, n.d.).

Another initiative is 'The Fashion Pact' pledging to work towards sustainable goals in climate, biodiversity and oceans (Turk, 2019). With currently around 250 brands including Kering and Farfetch, the pact is signing for change. However, the Arnault's LVMH group consisting of luxury brands Dior, Louis Vuitton and Givenchy are refusing to join the pact (Fashion United, 2019) claiming, 'We prefer acts to pacts' (Smith, 2019); this gives consumers uncertainty to transparency within the industry.



Figure 38



Figure 39

Another luxury brand Chanel claims it is "committed to recovering, recycling, reusing the materials in its shows wherever possible", this contrasts to their 2010 show where an iceberg from Sweden was trucked in (Kent, 2019).

This highlights if brands are generally committed to making a change or if they are doing it to fit in with the sustainability 'trend' and greenwashing their consumers. The consumers are confused and feel they have little trust between themselves and the brands. This gives the opportunity for brands to become more open and transparent about their production and garments, increasing the consumer's trust.



Figure 40

2.4 CHANGES OF IMPACT



Figure 41



Figure 42



Figure 43



Figure 44

The impact of sustainability has been noticed within the fashion calendar. This year NYFW condensed the calendar from seven to five days (Brown and Whelan, 2019). While the Swedish Fashion Council cancelled Stockholm Fashion Week over environmental concerns surrounding the bi-annual calendar (Hawkins, 2019). Jennie Rosen, holds the view that “We need to put the past to rest and to stimulate the development of a platform that is relevant for today’s fashion industry. We can adapt to new demands, reach sustainability goals and be able to set new standards for fashion” (Hawkins, 2019).

It is clear that the events are becoming more aware of how to improve their sustainability; This is a major step in terms of the fashion calendar and the future of sustainability.

Copenhagen Fashion Week is making important advancements by banning single-use plastics at fashion events and offset the emissions generated by international hosts and other direct parts they organise. A future system to introduce a 3-year plan with guides to minimum sustainability standards for brands that are showcasing in Denmark (Kent, 2019). By measuring their own impact, they discovered ‘the second most carbon-intensive aspect of its operations after international flights were the 100 t-shirts, they make for their staff every season. They now plan to make t-shirts without branding so they can be re-used for different seasons’ (Kent, 2019)

This is a clear example of a fashion event managing their sustainability and making forward steps; this needs to become a focal point for other events in the industry, as these are leading within the evolution of sustainability and the fashion industry.

2.5 OFFERING SUSTAINABLE ALTERNATIVES

Alternatives with a sustainable forefront are rising, with a ‘constant demand for newness and the rising concern about overconsumption’ (Baram, 2019) rental fashion has emerged. The rental market has evolved through the sharing economy (MarketLine, 2019), the concept of “subscription models have driven this trend making it affordable and convenient for consumers” (Baram, 2019) whilst increasing the life-cycle of the garments (Hughes, 2019). The second-hand clothing market has risen by 9.2% in value (Sabanoglu, 2019) and has been seen as a popular choice for consumers to shop within.

Consequently, these above solutions tackle the overconsumption of the industry, not the sustainability aspect of the events themselves. Through the enhancement of technology more sustainable options are becoming apparent such as digital catwalk concepts, this is discussed in chapter 4.



Figure 45

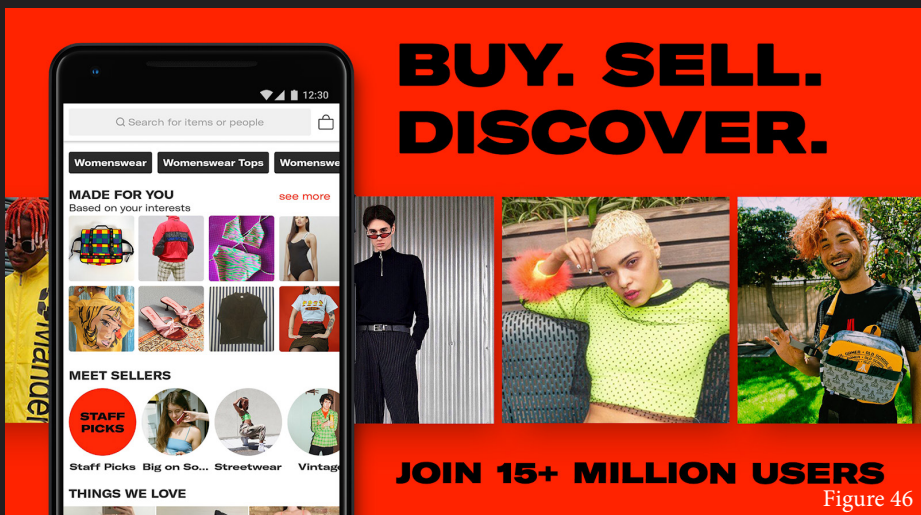


Figure 46

2.6 CONCLUSION

The evidence suggests that sustainability is making an extensive impact on the future of the catwalk. With the rise in consumer awareness and the movement of extinction rebellion, brands/events are being forced to make changes. The rise in sustainability has made an uncertain future for the catwalk, with the fashion weeks being reduced and some even cancelled for favourable sustainable options, this questions whether an alternative solution should be put in place.

CHAPTER 3: CONSUMERS

3:1 THE FRONT ROW EVOLUTION

The purpose of this chapter is to investigate the associated consumer groups of the catwalk and their habits and how this has impacted the future of the events.

The front row refers to the seating arrangements at the catwalk events; the seating arrangements showcase the hierarchy within the fashion industry; the timeline shows this evolution.



1989

During Martin Margiela SS90 it was officially the first fashion show to let the public in, allocating front row seats for the locals to watch.



2002

In 2002 it was the era of blogging, which would see impact on the catwalk, as Kathryn Finney who was one of the first fashion bloggers got invited to attend New York Fashion Week



2015

2015 was the year where influencers started to attend the catwalk events and use their phones to record the show to present to their followers.

Riccardo Tisci invited the public into his Givenchy show offering 1,200 tickets.



2019

London Fashion week (the first of the big 4 fashion capitals) have opened up to allow the public into the fashion events.

1943

The first press week was held, during this only editors were allowed to attend. However, buyers weren't allowed to attend the fashion shows and instead made showroom visits



1990

Around 1990's the front row started to be reserved for not just industry insiders but for big celebrities, this was shadowed with the rise of supermodels.



2008-2010

Following blogging in 2008 bloggers were prominently being seen on the catwalk for example, blogger 'Bryanboy' and Tavi Gevinson who was only 13 years old were sitting on the front row. 2010 Instagram was launched.



2016

Tommy Hilfiger let 1,000 guests into 'Tommy pier fairground show' for free



3:1 THE FRONT ROW EVOLUTION

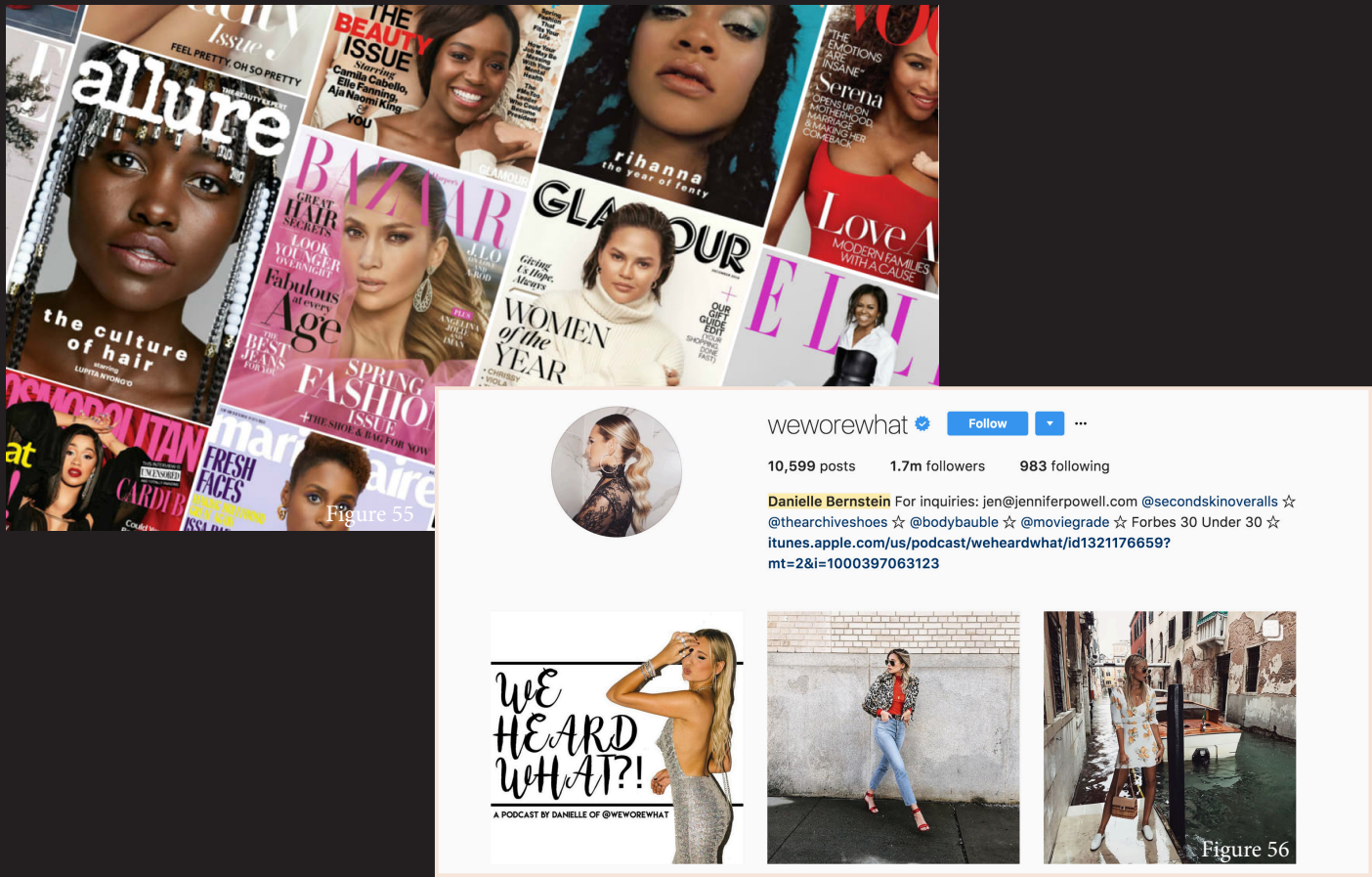
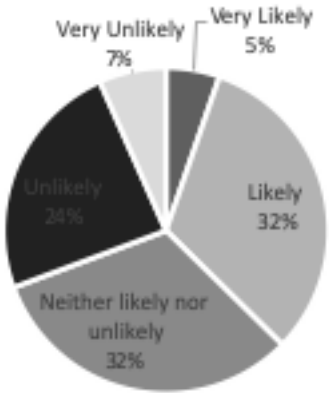


Figure 55

Figure 56

Are you more likely to purchase a product if promoted by an influencer?



Originally the catwalk shows were put in place as a selling mechanism, this is arguably still the same concept, however, the strategy has changed.

With the digital revolution, social media influencers are on the rise. In 2018 “Influencer economy of Instagram alone was valued at £752 million while 94% of business use influencers as a marketing strategy” (Hunter, 2018), this slightly varies for the Luxury market as ‘72% of brands marketing spend still attributes towards print marketing’ (Hunter, 2018) even though research showed in 2017 there was the “biggest fall in circulation of major magazines publishers with an 8.9% loss year on year” (Stott and Piras, 2018).

This illustrates that the luxury market isn’t adjusting to current marketing strategies as fast as other markets such as the high street brands. This suggests that with the growth in digital platforms, magazines are not as successful as once were. The luxury market needs to consider new options for how they are marketing the collections and events.

The influencers offer a gateway to the brands and their consumers with accessibility and relatability. Emily Gordan-Smith revealed: “We consider, more than ever, how the venue, images and content will live on social and digital” (Brown and Whelan, 2019). This highlights how much effect influencers are having; they increase consumer purchasing. This is supported by primary research as a questionnaire revealed 37% are more likely to

purchase a product if it has been promoted by an influencer (See graph 7) (Authors own, 2019). A defined focus group found Millennials were more likely to purchase from recommendations of influencers than Generation Z, as Generation Z were more likely to trust friends’ recommendations (Authors own, 2019) (Appendix 7). This generation was raised during the recession meaning they are more sceptical and less trusting.

According to Caroline Rush, “The rise of the social media influencers has forced the fashion industry to open up to the digital world” (The Business of Fashion, 2019). The traditional press finds it difficult to compete as the work is already published by one- click on social media platforms by the influencers (REUTERS, 2017). Photographer Chris Moore still finds the shows exciting after his 60 years attending the biggest shows however claims time is more limited because everything is instant (Porter, 2017)

The findings demonstrate the impact influencers are having on consumers. The catwalk is having to become ‘Instagrammable’ to be deemed worthy by the consumers; brands need to keep this focus to order to be desirable.



Figure 57

3:1 THE FRONT ROW EVOLUTION



Figure 58

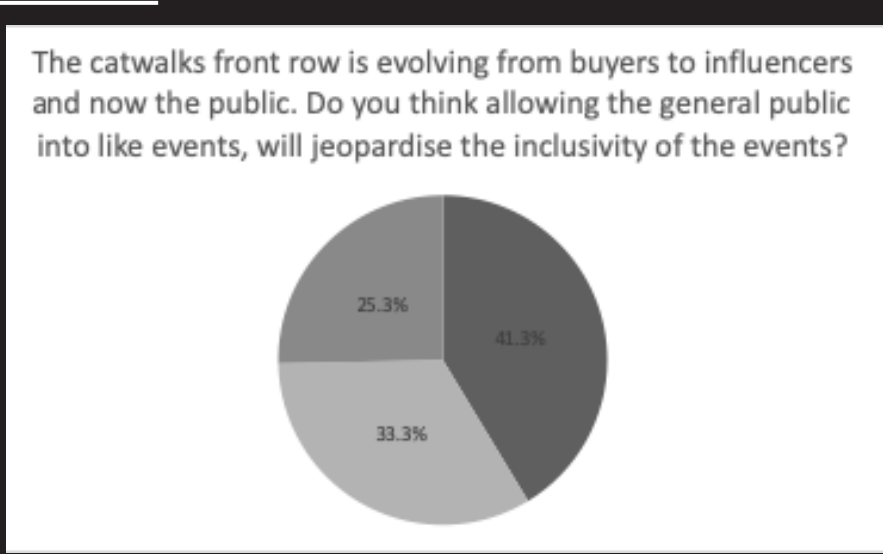


Figure 59

Disruption on the front row is the opening up to the general public. This year LFW allowed public sold tickets, allowing the general public to watch the catwalk from designers such as Henry Holland and Alexa Chung (The Business of Fashion, 2019)

Opening to the public has meant that designers are shifting their focus from industry to consumer, Anya Hindmarch claims they have axed the traditional format to become “more modern” (O’Connor, 2019). In contrast to this Emily Gordan Smith believes it is taking the exclusivity away from the event “opening fashion week to the general public does little to increase allure. Luxury brands need to return to traditional models of exclusivity to maintain relevance rather than increasing accessibility” (Brown and Whelan, 2019)

A questionnaire with the general public revealed that when asked if they think by allowing the general public into the fashion events will jeopardise the exclusivity of the event, it came back with a variation in results (see appendix 6) with ‘Yes’ representing 41% of respondents comparing to the 33% ‘No’. The close results reveal that there is uncertainty to whether the catwalk will stay inclusive. This newly adopted strategy will be determined over time on whether it is a positive action for the future of the catwalk.



3:2 SOCIAL MEDIA



Figure 60

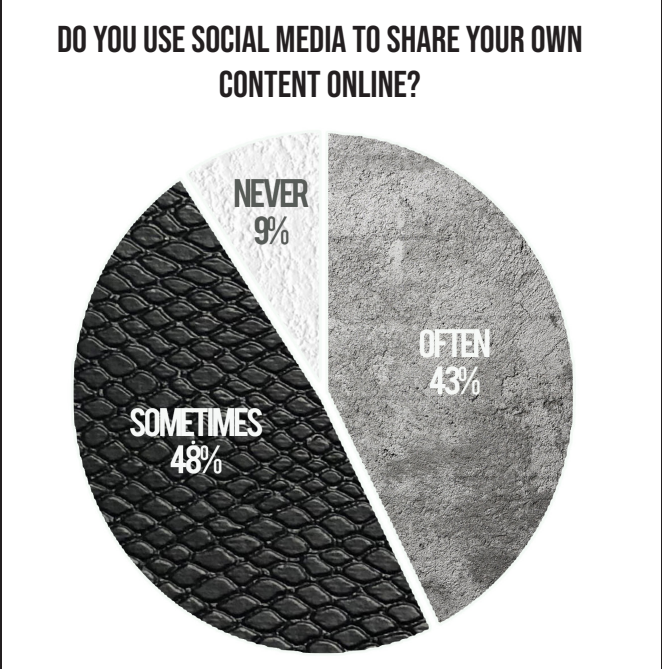


Figure 62

Social media has driven influencers and made an impact on fashion week. With ‘one in three people in the world using social media platforms’ (Ortiz-Ospina, 2019), this shows that it is a huge part of today’s society.

This is further supported by primary research as 42% of respondents ‘often’ use social media to share their own content such as photos and videos. This current data highlights that the use of social media to share our lives is used across all consumers. However, 9% claimed they ‘never’ share their own content; results mainly from 18-24-year olds, suggesting that ‘digital detox’ could be a factor as links between depression and excessive social media usage has found to make 62% feel inadequate when they compare their lives to others online (Kelly et al., 2018).

This shows the use of social media can be toxic and there is becoming more studies revealing these above links, which has driven some consumers to take part in the digital detox for their mental state. It is uncertain for the future whether the digital revolution will revert, brands need to stay awake to this and support their consumers’ needs and values through the consumer buying journey.



3:2 SOCIAL MEDIA

Social media has opened up a world for new consumers through the power of the influencer. Influencers use social media platforms to showcase their life and create a “power to affect purchasing decisions of others through their knowledge, position and relationship with their audience” (Influencer Marketing Hub, 2019). The film ‘Ingrid Goes West’ (Ingrid Goes West, 2017) showcases the relationship between consumer and influencer while showing the toxic side of the marketing that can lead to obsession, jealousy and loneliness. Sylvie Millstein the founder of Hellessy said: “fashion week was traditionally for industry, but social media has opened it up to the consumer for us”Brown and Whelan, 2019).

This drive of evolution has been forced from social media platforms. With these platforms’ consumers are becoming more aware. Directing this is the ‘call-out fashion’ culture, instigated by the Instagram accounts such as ‘Diet Prada’ and ‘Estee Laundry’, where brands are called out for inappropriate marketing or copycat designers etc (Marriott, 2018). These accounts have great power over brands, “Diet Prada are the ultimate check and balance, and that’s not a bad thing for consumers who want to be diligent about where they shop” (Chappet, 2019) because of this call out brands are having to become more accountable for their work and becoming more transparent to the consumers.



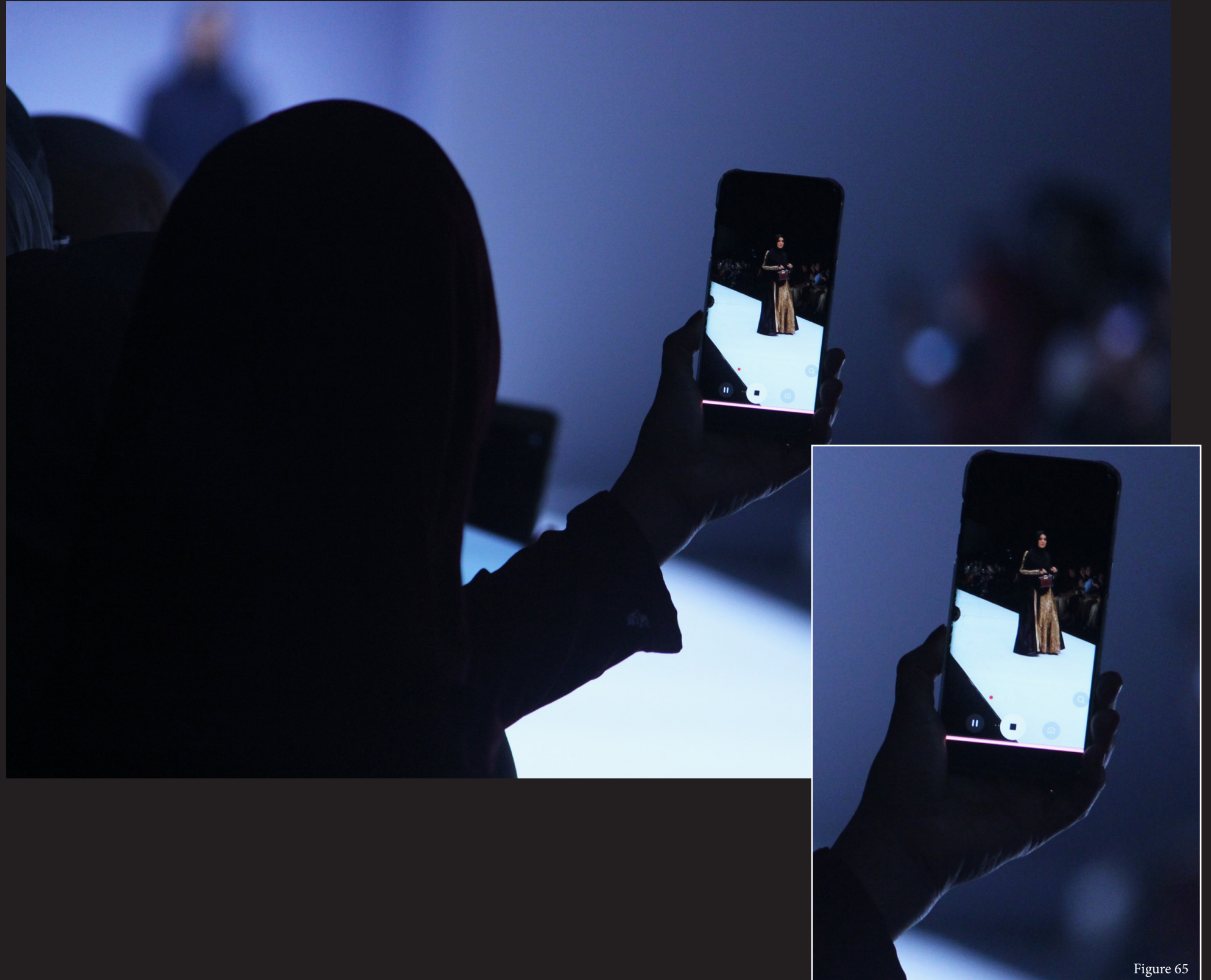
Figure 63



Figure 64

3:2 SOCIAL MEDIA

Naturally with the increase in social media this has had an impact on the catwalk. Phone culture has been noticed on the catwalk, through primary observations at Graduate Fashion Week this became a common occurrence where during the catwalk events, people were observing through their mobile phones and posting straight to their social media platforms. Likewise, designers noticed this, Marcus Wainwright claimed it made him frustrated to see the audience consuming the show through their phone (New York Fashion Week, 2019), this has led to embracing the technology, trying to engage it within the shows. This shows brands are not in control of how the catwalk fully evolves. This pushes the limit on the exclusivity of the shows, however, brands are still in control if they want the phones present or not.



3:3 CONSUMERS: MILLENNIALS AND GENERATION Z

The research identified that Gen Z and Millennials are demanding and driving change in the luxury sector; Millennials currently represent only 32% of spending in the luxury market, however, they are expected to represent 50% of the market by 2025 (Danziger, 2019). While Gen Z only represents 4% of the true luxury market, these consumers can't be underestimated as by 2020 they will drive 8% of spend (Danziger, 2019). Both these consumers are important for how the luxury market will change, brands need to take note of their values and needs and implement this into their marketing to achieve succeeding with these set of consumers. The consumer groups have shown to have differences in their values and behaviours, this is shown in the table.



Figure 66

Conducting a focus group to find further research to support the consumer groups found instrumental values such as responsibility, love and intellect were common across both consumers. Generation Z saw more self-accomplish values such as ambition and independence. Within terminal values, self-less values were present in Gen Z with freedom and equality where Millennials valued true friendships and honest love (see appendix 7). The research highlights that the consumer groups are similar to terms of action for change however, should be marketed separately as their values and needs differentiate.



Figure 67



Figure 68

	Millennials	Generation Z
Demographical		
Ages	23-38 (1977-1995)	4-24 (1996-2010)
Family Life Cycle	Newly Married/ Full Nest I	Bachelor Stage
Income	Medium-High	Low
Psychological		
Purchasing Motives	- Brand Choice: Labelled brands	- Discount Driven - Value Driven
Attitudes	- Loyal - Optimistic as raised doing economic boom - Instant recognition	- Want long term values as grew up during recessions - Confident
Expectations/ Behaviours	- Customers Experience is expected and focused upon - High users of social media	- Less likely to trust companies - Focuses on saving money - Digitally savvy: Grew up using technology

3:3 CONSUMERS: MILLENNIALS AND GENERATION Z

Previously investigated in the report, the impact that sustainability is having on the catwalk. Primary research has suggested that Gen Z and Millennials have a mixed opinion towards sustainability. When asked ‘Do you consider sustainability when making a product purchase?’ the results were varied as shown on the graph. Even though research suggested that Gen Z and Millennials are the ones behind the sustainability ‘trend’, this research indicates that actually as a group of consumers this is not the case. This suggests that actually behind the consumers is a tribe of a small minority of these consumers making the industry shift.

The Waste Warrior tribe 2016 from LSN (Jordan and Smith, 2016) is a take on this, the tribe are growing to become more sustainable in their daily life and having mindful approaches to their consumerism; where if they can, they will shop second hand. These were most likely the early adopters to this new outlook on sustainable that is being continentally driven by movements such as XR. The focus group found that no particular consumer was more likely to be sustainable meaning the tribe is made up of a variation of consumer groups.

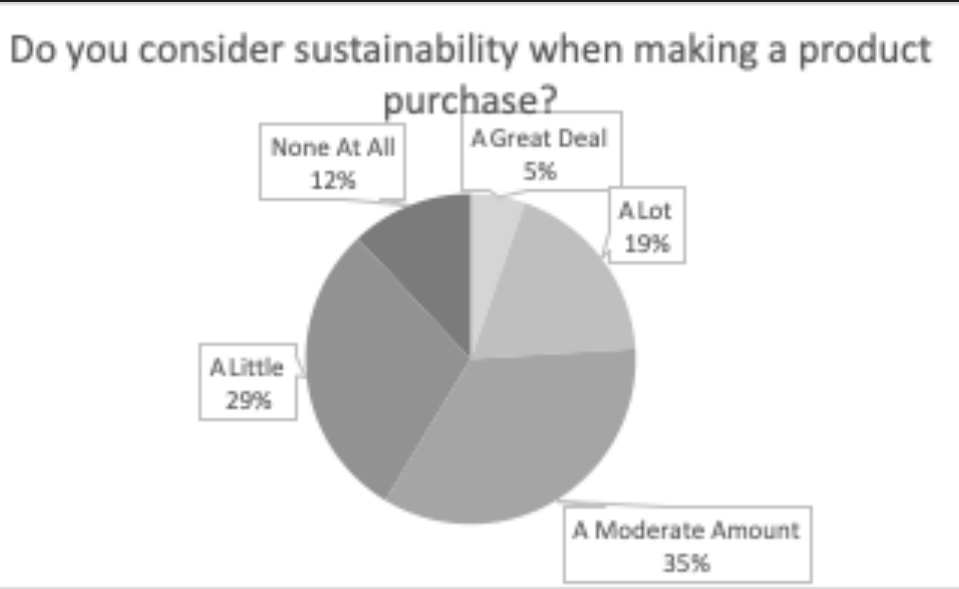


Figure 69



Figure 71



Figure 72



Figure 73



Figure 70



Figure 74



Figure 75



Figure 76

THE WASTE WARRIOR TRIBE



Figure 77

3.4

CONCLUSION

To conclude this chapter, it is evident that the evolution of the front row has stemmed from the advancement in social media; influencers have changed the structure of the events. Generation Z and Millennials influence are causing brands to take notice of them.

From previous chapter 2, research found Gen Z/Millennials to be influencing the sustainable force, yet research found that it doesn't account for the whole consumer group but more of a minority, identifying these as a tribe.

CHAPTER 4: TECHNOLOGY

4.1 RISE OF THE TECHNOLOGY SECTOR

Within this chapter, the development of technology will be analysed to see if this has had any effect on the future of the catwalk.

“The UK technology sector is growing more than two-and-a-half times faster than the overall economy” (Flinders, 2018).

More forms of technology are being introduced, within 2019 the top key players are the rise of 5G, the democratisation of artificial intelligence and the acceleration of 3D printing (Deloitte, 2019).

With 9/10 consumer owning a phone in 2019 (Deloitte, 2019), it is no surprise that technology for phones are being constantly developed. More brands are investing in using marketing aimed at mobile users. The digital advertising marketing has grown by 15% from 2017 to 2018 and is now worth £13.44 billion, the drive behind this comes from mobile and video which are predicted continued growth due to introduction to 5G (McGrath, 2019).

Early adopts have taken advantage of the introduction to augmented reality as it is becoming more accessible. For the consumer augmented reality (AR) offers cognitive engagement with visual assistant; this enhanced the customer experience. There has been a growth of users with 28% of smartphone owners having tried it within phone or video content and 22% in an AR formatted game (King, 2018).



**“FASHION BRANDS ARE
INCREASINGLY AWARE
THAT THEY MUST BE
TECHNOLOGICALLY
LITERATE TO MEET THE
NEEDS OF SHOPPERS
WHO WANT INSTANT
GRATIFICATION”**

(FASHIONUNITED, 2019)

4.2 : TECHNOLOGY ON THE CATWALK

Technology is becoming more prominent on the catwalk, with technology giving consumers instant access to data this has given the need for instant gratification.

The way we shop at the catwalk events has changed due to this; originally orders would be placed and received months later, there is now a 'see now, buy now' culture. The clothes are available to buy straight after the shows offering instant gratification for customers. Claims **"fashion week is dying because it has zero relevance to the way modern shoppers buy stuff"** (Jennings, 2019). This sees that brands are having to change their buying strategy to suit their customers.

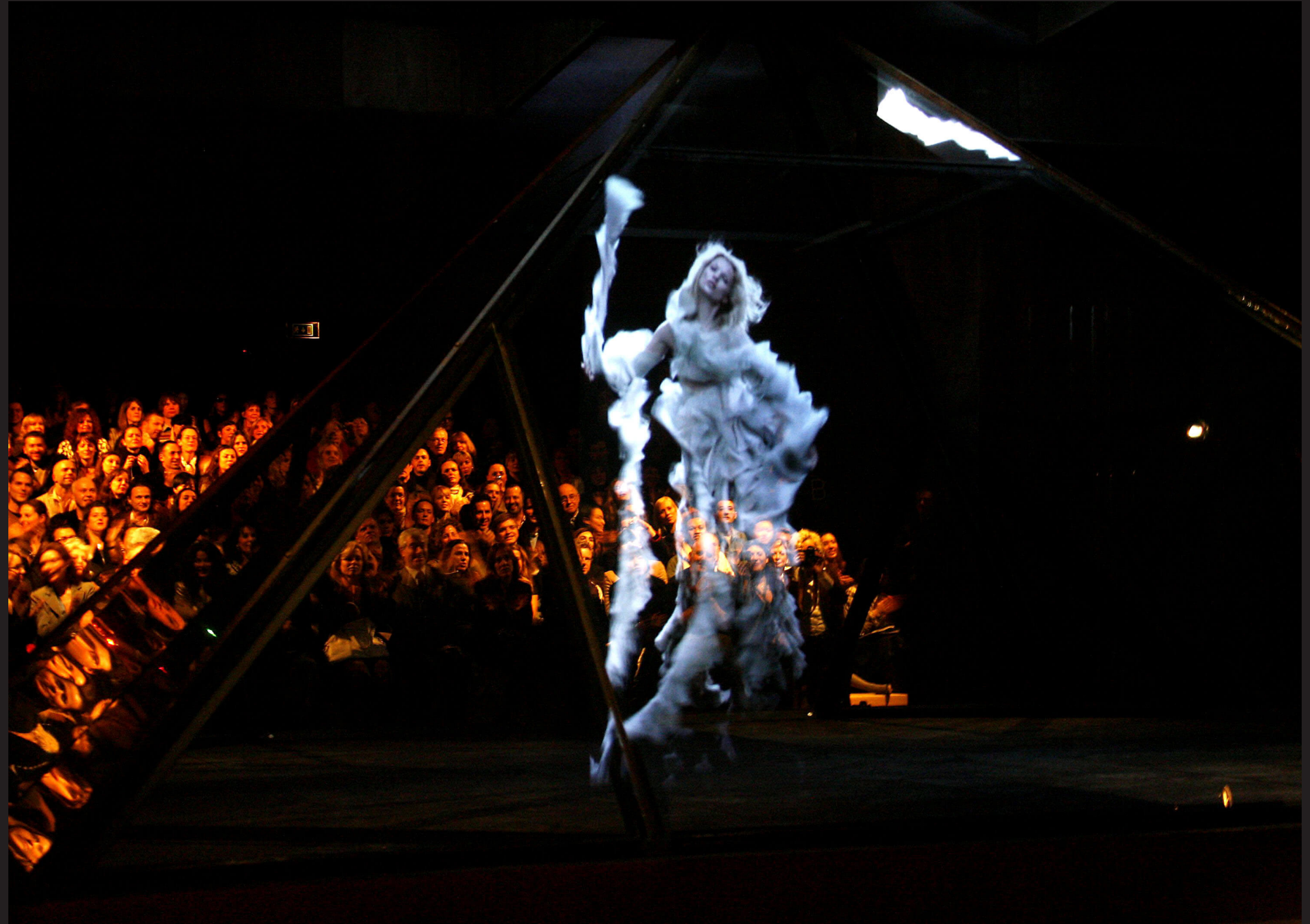


Figure 82

4.2 TIMELINE OF TECHNOLOGY

Not only has technology changed the shopping consumer model, but it has also changed within the catwalk. The digital technology has been incorporated into the set design and concept. The timeline shows how technology has been introduced into the catwalk.



1999
Alexander McQueen used 2 industrial robots to create a design on a dress live, this was creating the art in-front of the consumers



2010
Burberry was the first major fashion house to live stream it's catwalk in 3D.



2014
For Fendi's fall show they used drones to hover over the runway, this transmitted video footage through a live stream, that consumers could watch.



2019
Introduction of 5G on the catwalk, Three launched this data for the first time at the event in collaboration with a London University.

1998
Helmut Lang was the first designer to embrace the movement of technology. He presented his show online, as it allowed all his viewers to be able to watch.



2006
Hussein Chalayan created a computer system dress for his spring 2007 collection. Exploring using different materials through technology.



2012
Google glass project creating a wearable tech industry, this opened up to compelling fashion collaborations.



2016
Becca McCharen placed VR glasses on every seat at the show so guests can resee the collection at home



4.2 TECHNOLOGY ON THE CATWALK

Some more recent examples of this are Three launching their 5G network at LFW, the launch meant the “5G delivered next-generation immersive experience while removing the limitations” quoted Greg Furber (Three Media Centre, 2019). This lead on to creating a concept where customers can go into the flagship store on Oxford Circus and access the 5G (Three Media Centre, 2019); this concept has created a leading on experience.

Another example of a luxury brand integrating technology is Tommy Hilfiger’s TommyNow show. The show had a new online virtual reality commerce experience offering a virtual pop-up-show (MarketLine, 2019). The ‘see now, buy now’ concept was used, making their products shoppable across online, in-store, wholesale partners and their social media available in more than 70 countries (Wightman-Stone, 2019), this omnichannel approach offers more for their consumers while being convenient.

All of the examples show how brands adapted technology to suit their brand and customers to create an innovative and engaging show. With the development of technology, brands need to become more engaged and aware to keep interest in their fashion shows.



Figure 91

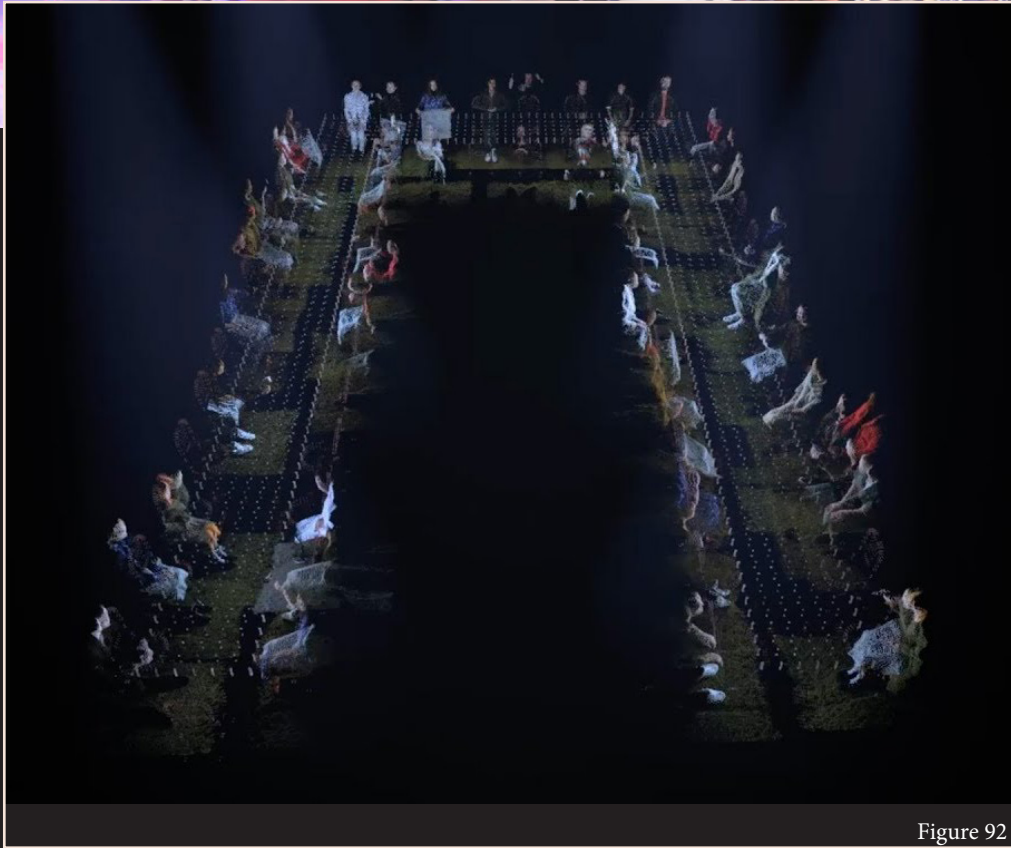


Figure 92

4.3 DIGITAL WILL REPLACE THE CATWALK?

With the clear use of the digital revolution being used more frequently for fashion shows, it questions whether the digital era will eventually replace the exists of the catwalk and brands will change their business strategies.

Executive of British Fashion Council, Caroline Rush believes in the exists of fashion week however claims that catwalk shows aren't always the best option for brands quoting "You don't need to do a catwalk show. Designers need to think about who they are trying to speak to and what is the best way to communicate their products to their audience" (Moran, 2018).

An example of how technology, in particular, artificial intelligence has potential to eliminate and change fashion week is The Fabricant. "Fabricant is a digital fashion show that creates collections that only exist in a digital space" (McGregor, 2018). Their virtual fashion concept operates through the present and the future.

An interview with the Founder Kerry Murphy found he believes that with the 'slow development of the catwalk shows over the past 100 years, that eventually the term "catwalk" will most likely disappear". Through digitalisation it allows us to be anywhere anytime without ever having to ship a single piece of fabric. This concept will make traditional fashion practices sustainable, effective and lower

the cost of development while increasing creativity'. Kerry feels that Fabricant are trying to create new experiences for people to consume fashion in a new way, that also sparks an emotional reaction in them correlating to Maslow's Hierarchy of Needs (Authors own, 2019)(See appendix 2).



4.3 DIGITAL WILL REPLACE THE CATWALK?



Figure 96

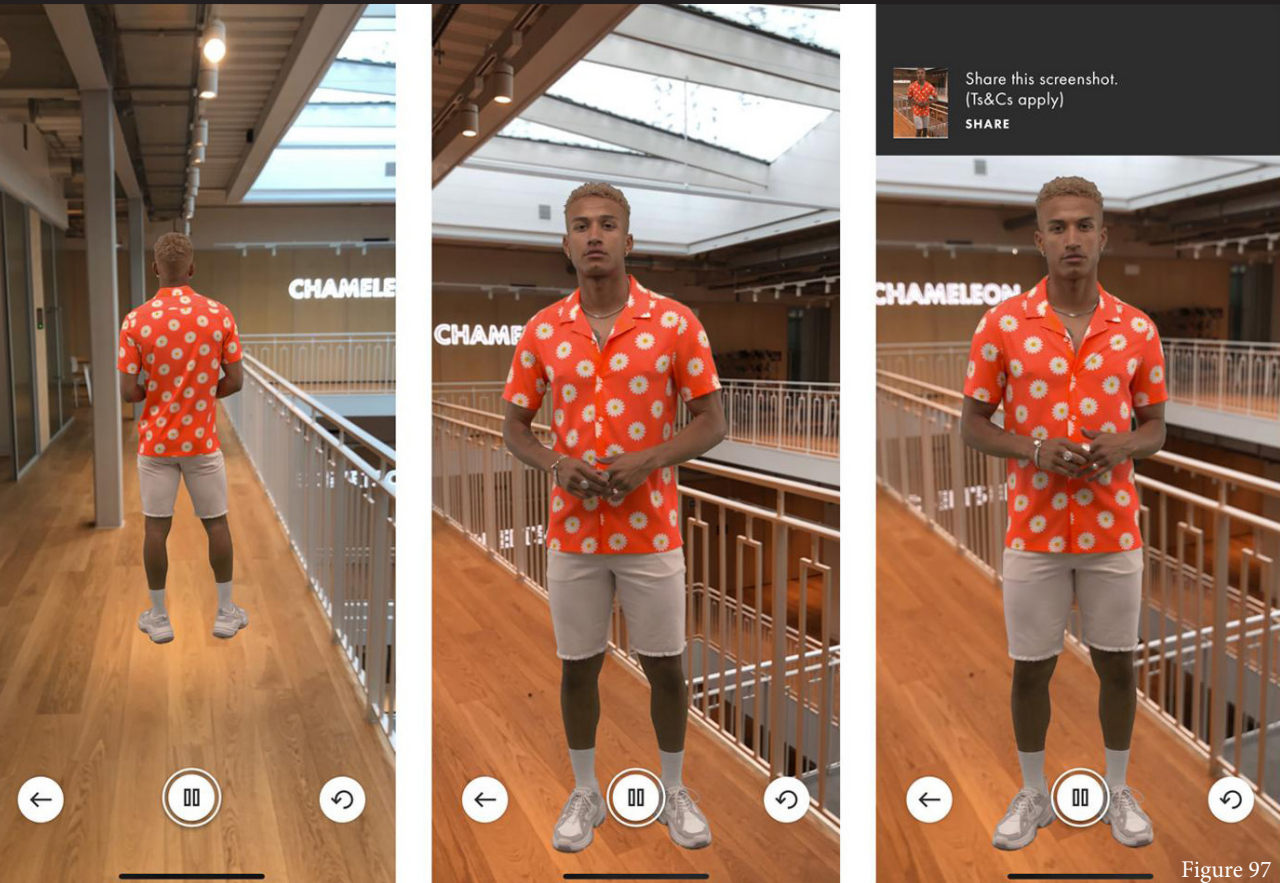


Figure 97

An idea of Swapp, where “artificial intelligence realistically swaps people’s faces into the brand content” and ASOS creating a virtual catwalk “Through this concept we can create a more intimate buying experience” (Houghton and Friend, 2019). This highlights that technology is being developed to us for luxury brands to create emotional connections.

To support this research, Jessica Graves product scientist claimed, “Technology can save fashion” (Stott and Piras, 2018).

This demonstrates that brands need to invest within the technology sector to keep up with their competition and the evolution of the catwalk as the future for a digitally sustainable catwalk is favourable.



Figure 98

4.4 CONCLUSION

To conclude this section, the literature identifies that with the growth in technology, more options are opening on how brands are presenting their collections. The introduction of artificial intelligence, 5G and digital 3D printing will drive this innovation. Realising the catwalk is not just for presenting the collection but creating a stand-alone art, motivates brands to create something new and to break the barriers within the fashion events such as digital catwalks.

CONCLUSION

To conclude, this study set out to explore the evolution of the catwalk and to determine what are the factors impacting change to the future of the catwalk. With the continual growth in the luxury market (Altagamma, 2019) and the rise of consumer spending (Mintel, 2018); catwalk events are still prominently used for brands marketing. It is clear that the catwalk has evolved from an event for just buyers to a spectacle show to create stand-alone ‘art’ as well as showcase the collection in more innovative and relevant ways, examples of this include 2008 Fendi Great Wall of China show and 2017 Tommy Hilfiger ‘Tommyland S/S’ event.

Exploring the historical evolution of the catwalk shows, unveiled an increasing pressure on designers to afford to present at these events. The events cost from £100,000 (Harris, 2014) up to £1 million on average (Luxury Lifestyle Magazine, 2018), with the development of having these spectacle show, brands are having to invest more capital causing new emerging designers to feel strained. The dissertation has identified the costings of the catwalk productions to be a factor that could impact the future of the catwalk, as new designers may look else-where to showcase their collections, including digital catwalks.

The most obvious findings to emerge from this study is that the rise in sustainability is impacting the future of the catwalk. With the drive of sustainability across all industries, consumers are becoming more aware. This has brought attention to the correlation in sustainability and the fashion industry, “the events are temporary, but the waste you leave is not” (Kent, 2019). This sustainability impact has been driven by the activist movement of Extinction Rebellion and the rise in mind-full consumerism from tribes such as early adopters waste warriors (Jordan and Smith, 2016). Impact from this factor has already been noticed with the cancelling of Stockholm Fashion week (Hawkins, 2019). and the condensing from 7 to 5 days at NYFW (Brown and Whelan, 2019). There is no doubt that the catwalk will continually be impacted by sustainability, with more digital sustainability options being developed, this leaves uncertainty for the future of the catwalk but opportunity for change.



Figure 99

The investigation of the front row evolution has shown that the catwalk has evolved, with one in three people in the world using social media platforms (Ortiz-Ospina, 2019), social media has driven the rise of influencers, which has encouraged luxury brands to adopt this new marketing strategy. Influencers have made a significant impact on the catwalk as they have changed the way consumers purchase, with primary research finding 37% are more likely to buy a product if recommended from an influence (Authors own, 2019); the influencers have linked brands to their consumers.

The study found allowing the general public into inclusive fashion events will impact the future of events. With this recent action being made to make the events “more modern” (O’Connor, 2019), it has caused uncertainty across the industry with Emily Smith claiming “Luxury brands need to return to traditional models of exclusivity to maintain relevance” (Brown and Whelan, 2019), primary research found the general public was unsure of whether this action would affect the exclusivity of the events (Authors own, 2019). This factor is still within the early adoption phase; however, it will cause events to change their traditional model to allow the public in, this factor is something that brands should be aware of.

CONCLUSION

One of the more significant findings to emerge from this study is that by 2025 Millennials will represent 50% of spending in the luxury market, while Generation Z will drive 8% of spending by 2020 (Danziger, 2019). These emerging consumers need to be considered by brands, as the way the consumer is evolving. The 'see now, buy now' model on the catwalk was implemented to give instant gratification to consumer which was driven by these generations. The catwalk will have to adopt a strategy that works and is convenient for its customers.

The greatest impact for the future of the catwalk was found to be the growth in technology. With the UK technology growing at two-and-a-half times faster than the overall economy (Flinders, 2018) and the introduction of artificial intelligence, 5G and 3D printing many sustainable, innovative are causing threat to the future of the catwalk. Brands are emerging this technology into their catwalk events, for example, Rag & Bone 2019. Not only is technology being used to merge with the catwalk, but there is also potential for it to eliminate the events. 'The Fabricant' uses artificial intelligence to create a digital fashion show (McGregor, 2018), an interview with the founder revealed he suggested 'eventually the term "catwalk" will most likely disappear' (Authors own, 2019), other advancements have been founded such as ASOS virtual catwalk on their app (Houghton and Friend, 2019). These ideas would be a sustainable way to present the collections, however, it is still early adopted to see the effect on the consumers. Technology has been identified as a factor to impact the catwalks future.

Overall, this study has found that various key factors such as the rising concerns over sustainability, the evolution of the front row that has become more consumer focused, the influencer growth for Millennials and Generation Z and lastly the advancements in innovative and relevant technology are impacting the future of the catwalk. These have been identified and suggested that brands and consumers are aware of these factors in order to remain relevant and innovative in the fashion industry.



Figure 100

RECOMMENDATIONS

1

BECOMING SEASONLESS

The findings of this study suggest with the uncertainty of the fashion calendars future regarding the sustainability issues and brands focus, there is an opportunity for the catwalks calendar to be reconsidered. The research suggested creating a seasonless calendar would benefit brands as they would be able to showcase collections when they are ready, which also decreases the amount of consumerism by customers and decreases event costs for new emerging designers. The fashion calendar pressures designers to create clothes for every season; this action would eliminate that. Instead of getting rid of the catwalk events all together, they become an alternative option for brands to showcase when they are ready whether this is once a year or once every three years; this would still create the buzz and attention for brands using a more achievable event. This is something that fashion events could take into consideration.

2

INVEST INTO TECHNOLOGY

The study found the greatest impact on the future of the catwalk was the development of technology. For brands, they need to invest in this groundbreaking technology to become a lead influence in the industry and to maintain the connection between the brand and consumers. The idea of a digital catwalk was prominent and could be well executed if further research was conducted. The digital catwalk would decline the correlation in sustainability and the fashion events as people would not need to travel to these events while the costing impact would be lowered with the execution of the use of models, venue hire etc, however, the initial investment would be high for the innovative technology to produce the digital event. This could push the limits for creativity using technology, if marketing international the models could be changed depending on the country to include diversity and make it more personal for the luxury brands.

3

MARKETING STRATEGY CONSIDERATION FOR MILLENNIALS AND GENERATION Z

The evidence from the study suggests that brands need to prioritise Millennials and Generation Z as their consumers as they will make a considerable impact to the spending within the luxury market in the next few years. Further research is required to continue to compare what platforms Millennials and Generation Z are interacting with the most, so these luxury brands can implement this into their marketing. Current research found influencer marketing is currently being used however this marketing is less effective within Generation Z. The luxury market spends 72% of the budget on magazine publications even with a decline in circulation of magazines. This recommendation is finding what's new and relevant for this consumer base and trying to target them to engage with these fashion events through them. The luxury market needs to re-evaluate its marketing strategy, to make their content and products noticed by these up-coming consumers.

4

A SUSTAINABLE EVENT PACT

A clear and achievable goal for fashion events would be, to become as sustainable as possible. Research found that Copenhagen Fashion Week has banned single-use plastics and offset their emissions; more events need to part take in these changes. Similar to the Fashion Pact, a pact could be put in place for events to become more sustainable, but not only that the pact can teach and instruct brands and events on how to become sustainable, as research found that people want to make change but are unsure on how to make the change. The pact could tackle issues such as the use of goodie bags, paper tickets, single-use water bottles and the emissions that people make to attend these events. The pact of creating a fashion event policy could guide these events to be sustainable, which over-time could become mandatory.

APPENDIX 1

Primary research

Interview via phone call with Instagram activist Emily Broughton (@savingthegrace) - Friday 1st November

Interviewer: Thank you for taking your time for this interview, I really appreciate it. I'm doing my dissertation on the evolution of the catwalk and what's impacting it. I've found sustainability is having a really big impact on what's been seen on the catwalk. I just wanted to ask; how do you feel about sustainability within the fashion industry?

Emily Broughton: Well... it's got a long way to go. **I'd say there is a lot of green washing happening at the moment because companies are seeing it as a PR stunt and that they can make exact money if they define themselves as sustainable. There are very few truly sustainable brands**, but there are becoming more which is great. I think there are becoming a lot more innovative ways of re-using and recycled things and materials such as fishing nets to make clothes. Ultimately the fashion industry is fast fashion, which is not sustainable and built upon consumer model and we actually need to move more towards second hand fashion and I guess reusing things like that, that already exist instead of creating new ways that ultimately adds to the problem.

Interviewer: So, do you feel like it's got to come from both the designers and the consumers to want to make a change?

Emily Broughton: Yeah definitely, I mean I think ultimately the designers follows what the consumers want, and **I really believe in the power of the individuals** and you know impact change. That's why I don't shop fast fashion, but I still think I look pretty normal and I get comments on the clothing and lots of them are second hand. **You don't need to be shopping fast fashion to be fashionable. Its redefining how we approach fashion and how we shop.**

Interviewer: I agree, have you ever been to a catwalk or fashion show?

Emily Broughton: I mean I guess I walked in one when I was in school once, but not a properly one no.

Interviewer: Just generally then, do you think it all filters down to the catwalk allowing this consumerism and how we see seasons every year, is that encouraging?

Emily Broughton: I think that's a very small part of the general consumer doesn't know what's happened on the latest season. They just go to their Zara or H&M and see what's in the shop. I think the catwalk is for luxury, to be honest and lower down the chain the catwalk doesn't really mean that much. But obviously it still has influencers.

Interviewer: Yeah, so you think it comes more from the fast fashion/ high street brands that are producing more?

Emily Broughton: Yeah

Interviewer: Are you part of the Extinction Rebellion movement?

Emily Broughton: No, I'm not no. I mean I agree what they are promoting but because of some of the things they are doing, it's like I guess I'm on the fence about whether to join out of controversy. So, no I'm not, I also don't believe in some of their solutions.

Interviewer: Yeah, it's hard to find what the best solution is, where we can go to create a more sustainable industry. I know you live quite a sustainable life; how did you take this on?

Emily Broughton: I mean I try too. **I think it's impossible to be fully sustainable** and I still have a long way to go in my sustainability journey. I'm not plastic free, I still obviously travel- things like that, I guess it's doing little by little to try improve my sustainability. Mine started because I always wanted to impact the world, I actually became ill a few years ago about 4 years ago and they led to my own personal health and healing journey. From that I realised everything that I do has an impact on the world, I then got obsessed with water and how we are connected through water in the world. I then started the 'savingthegrace' last July, so it's been a journey since then, I've still got a long way to go. I've solidified on the fashion front and the eating front now I'm trying to become package free but I think it's impossible to do it all at once to be totally honest.

Interviewer: Do you use your social media a lot to promote this idea and make other people aware? Find it has a big influencer?

Emily Broughton: Yeah, I started it purely to spread a message, I'm actually a bit fed up with Instagram if I'm honest. The change in algorithms, it's a nightmare when you're trying to spread a positive message. Its hard, other people are finding that too. So yeah, I wouldn't be saving the grace without that but also my blog gets quite a lot of attraction so there are other ways rather than just through Instagram.

Interviewer: I saw on your Instagram your creating an app?

Emily Broughton: I'm creating one now, we are not having an app now- we are doing it as a London sustainability guide. It's called the 'Quantum Community' on Instagram. We are creating a website that will be a sustainability guide for events, brands and different things that are happening in London.

Interviewer: I love that idea; I think sometimes people want to be more sustainable but don't know where to start.

Emily Broughton: Yeah exactly, **that's the problem and hopefully we are creating a solution.** Then hopefully it will spread to other cities.

Interviewer: I'm looking more into the catwalk and events, like the waste that comes from events such as the sets or goody bags. Will it change so it is more virtually and more of a digital world.

Emily Broughton: I don't think the events will stop, I went to a London Fashion Week rental pop up event and they gave out these goodie bags and I don't think I've used a single thing.

Interviewer: Yeah that's another thing I've seen is the rental service. It's definitely increasing, more people are inclined to rent, it's more a sustainable option as it expands the lifecycle of the product. Have you used a rental service?

Emily Broughton: Yeah, I have used a rental service, I use several for events, some are quite expensive there are some cheaper ones like higher street. If I'm going to spend x amount of money sometimes, I do just want to buy it and I do or second hand. **Second hand is generally my preferred option.** If I've got a special event then I'm might, I'm fortunate enough that I do get some rentals for free with the position I'm in.

Interviewer: You know when you normally shop second hand, is that through thrift shops or depop or a bit of both?

Emily Broughton: Lots of my friends or people I know run second-hand pop ups with luxury clothes, which is amazing. There are amazing second-hand stores which are luxury boutiques, charity shops however often you have to go through it and be patient, you can't expect to go once and find something. It's the equivalent of going to Zara to find black jeans. Now I'm out of fast fashion, I actually buy better quality stuff, as I think it lasts longer and looks nicer.

Interviewer: Yeah if you buy, you'd rather buy the one of pieces with better quality than the cheap ones you'd wear once or twice?

Emily Broughton: Yeah exactly, I use to be the biggest Zara addict ever, I used to be in there every couple of weeks and I loved it. But then when I did clear outs, that was always everything that I gave away. **There was no emotion attachment to it, where the stuff I spend more money on I have more emotion attachment to them.** In the long run with fast fashion you end up spending a lot more money. **We are so disconnected with who makes the products, it is causing a problem across the world.**

Interviewer: I agree, it's really interesting to do this research and find what people's thoughts are on this situation.

Emily Broughton: Yeah, I think the consumer holds a lot of power, in the sense that if we start to make changes, ultimately the brands are going to have to change, I think that's the driving front for change. We underestimated how much power we as consumers have.

Interview ended.

APPENDIX 2

Primary research

Interview via LinkedIn message with Kerry Murphy, The Founder at the Fabricant
- Tuesday 5th November

Interviewer:

With the use of a digital fashion collection is this a more sustainable option for the fashion industry?

Kerry Murphy:

Digitisation will be a tool to make traditional fashion practices more sustainable, effective and lower the costs of development while increasing creativity. Architecture, automotive, aeronautical and other design industries have already achieved these. Digitisation will be the future of fashion and new business models are starting to emerge. Lukso.io is a perfect example of technical innovation in the blockchain space showcasing how digital twins can improve communication, origin and transparency of our garments.

Interviewer:

What is the future for fashion shows?

Kerry Murphy:

Catwalk shows have not developed far since their inception from over a 100 years ago. **Virtual space allows us to try and develop new experiences around clothing.** The term catwalk will most likely disappear. This was the first digital fashion ‘catwalk’ we released last year and it was presented in Paris, Amsterdam and Maastricht at the same time. - https://www.dropbox.com/s/40p4sa9y6o12jzu/DEEP_COLLECTION_DDW_V01.mp4?dl=0 Digitisation allows for us to be anywhere anytime without ever having to ship a single piece of fabric.

Interviewer:

How do you feel about the movement of digitalisation and technology within fashion shows?

Kerry Murphy:

Probably **going too slow and not imaginative enough currently.** In my experience many people are trying to translate the current practices into the same in the digital world. **We’re trying to create new experiences for people to consume fashion in a new way, that also sparks an emotional reaction in them.**

APPENDIX 3

Primary research

Interview via Email with Serefina Charles – Midlands Fashion Awards Sustainability Designer of the Year 2019
- Monday 4th November

Interviewer: How do you feel about sustainability within the fashion industry?

Serefina Charles:

Brands and designers are becoming more aware of sustainable issues in the industry but at most are still not making the necessary changes. It is less cost affective for brands to be sustainable and more often than not money is seen as more important than sustainable practise. Some consumer studies have **highlighted that people would be willing to pay slightly more for sustainable clothing yet this isn’t being reflected within purchase rates.** Until consumers drastically reduce how much they buy from fast fashion stores, a lot of brands won’t be willing to make the change because they are money driven. Some designers and companies are making a change such as Raeburn and Stella McCartney. Even small changes such as knowing where your fabrics are coming from or being mindful about how much fabric you are discarding can make a big impact and a step in the right direction.

Interviewer: What is your view on sustainability on the catwalk?

Serefina Charles:

Being more sustainable in the industry can be difficult to manage and maintain, especially if creating something for a catwalk. **Designers could feel more pressured to make a wow factor for the runway instead of focusing on the ethical processes being it.**

Interviewer: Do you think having the catwalk as an on-going event is a sustainable option to showcasing new collections?

Serefina Charles:

I think a more intimate show would be more sustainable than the massive production type catwalks that are used today. A lot of excessive waste and energy is produced for a very small amount of show time. It also doesn’t send the right message to consumers about considering sustainability. This is mainly an issue with some of the biggest designer names in the industry.

Interviewer: As a designer, do you feel pressured to create sustainable options?

Serefina Charles:

I feel it is important to be more aware of the impact that you have on the environment in everyday life and within my work. I don’t so much feel pressured as sustainability has always been an interest of mine and have quite naturally considered this in my work. **It is important to me to be producing work and garments that I am proud of and if I was being unsustainable or wasteful, I wouldn’t feel proud of the outcome.**

APPENDIX 4

Primary research

Interview via Email with Tolly Dolly Posh – An instagram sustainable influencer with over 10.8k followers (@tollydollyposh)
- Tuesday 29th October

Interviewer: What is your view on sustainability on the catwalk?

Tolly Dolly Posh:

If we're talking about fashion week (such as London Fashion Week), I don't think the term sustainability can really be applied. Yes, designers can be sourcing their fabrics from more sustainable suppliers etc, but is it really sustainable to be advertising collections for future seasons when the future of the planet is so uncertain and unpredictable? The glamourisation of the event no longer sits right with me for this reason, especially when the events themselves are often produced in such unsustainable ways using single-use sets and promoting unsustainable businesses and brands alongside it.

Interviewer: Do you feel changes need to be made both within the industry as a whole and the catwalk? If so, what is the future for sustainability and fashion?

Tolly Dolly Posh :

Absolutely - the whole industry needs to be reimagined. We need to transition to an industry which is based on circularity and one which significantly decreases the number of garments produced per year. I'd also like to see the concept of trends scrapped, as they are one of the main reasons for the huge consumer demand within the industry.

Interviewer: What are your views on the Extinction Rebellion movement?

Tolly Dolly Posh:

I've been a part of Extinction Rebellion since April 2019, working with regional groups as well as more locally to me on actions. After the actions in October 2019, I am still very much supportive of the movement and what it means to me, however, I do believe that work needs to be done to make it a more inclusive and diverse movement and I am hoping to start working on this within my local group.

APPENDIX 5

Primary research

Observation took place at Graduate Fashion Week – June 2019

The researcher attended Graduate Fashion Week and saw numerous catwalk shows, where students represent their work to sponsors such as George, LVMH, Jack Wills and Givenchy as well as industry professionals such as Hilary Alexander, Henry Holland and Zandra Rhodes as well as Instagram @intheform in attendance.

Firstly, you can notice the wave of phones when the models were walking down the catwalk. Below are some photos to capture this moment. It showed just how prominent they were on the catwalk, checking Instagram hashtag later showed the images had already been shared with their followers.

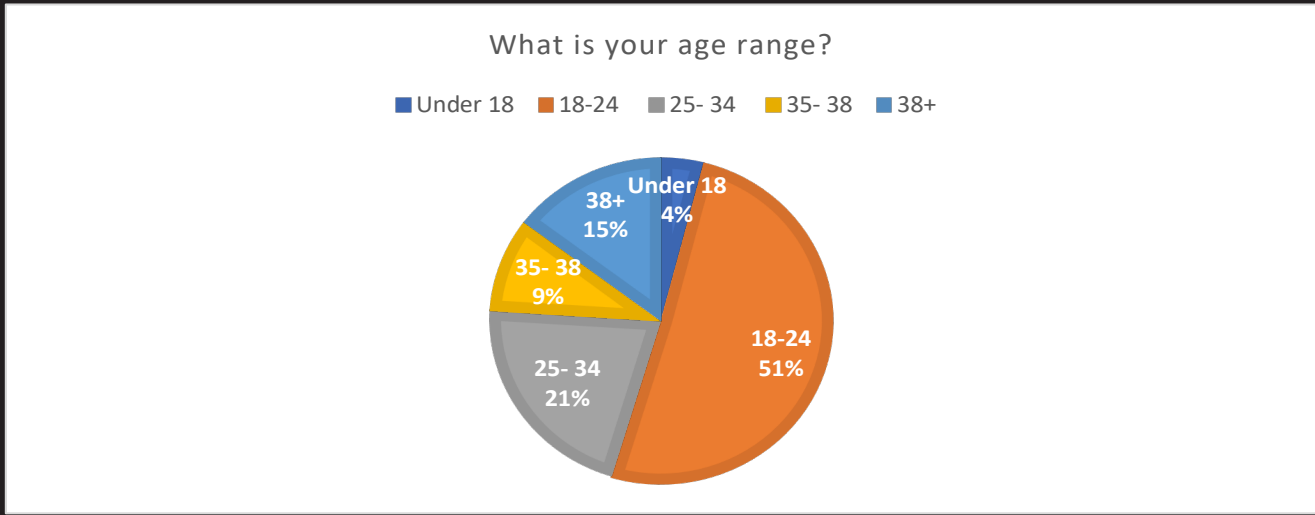
Being within the sponsorship team, it came apparent how brands valued being on the front row. There were numerous occasions where brands within the 2nd or 3rd row were not happy, with one refusing till they eventually sat front row. This primary observation alliterated the hierarchy of sitting on the front row and how it made those individuals feel.



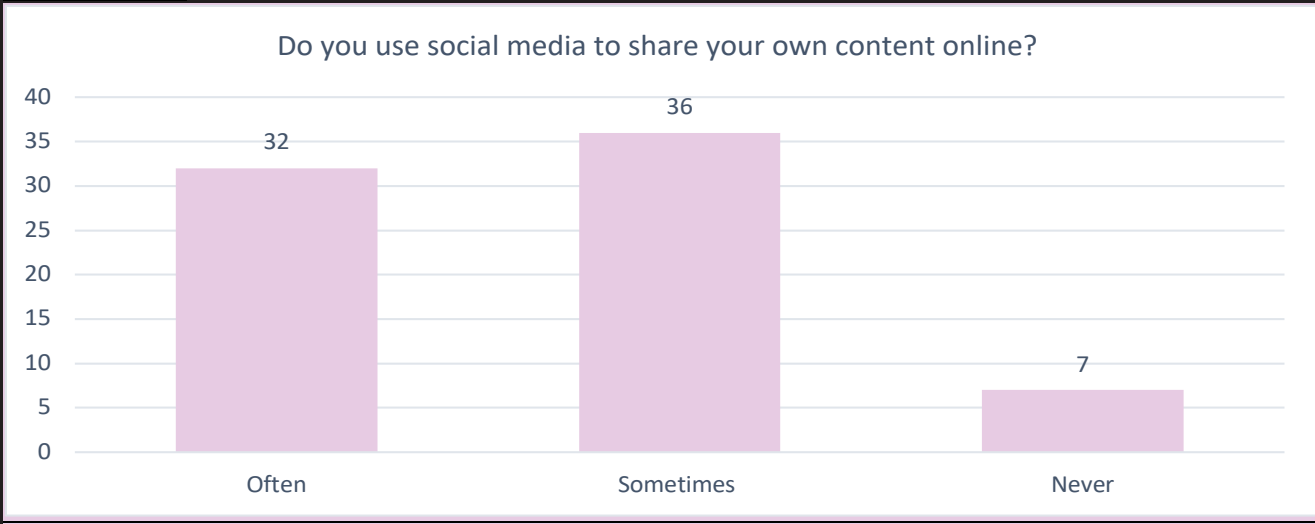
APPENDIX 6

Questionnaire created on Survey Monkey and shared via researcher’s social media. Aimed at 16-38+, mixed gender to see the opinions of each consumer group.

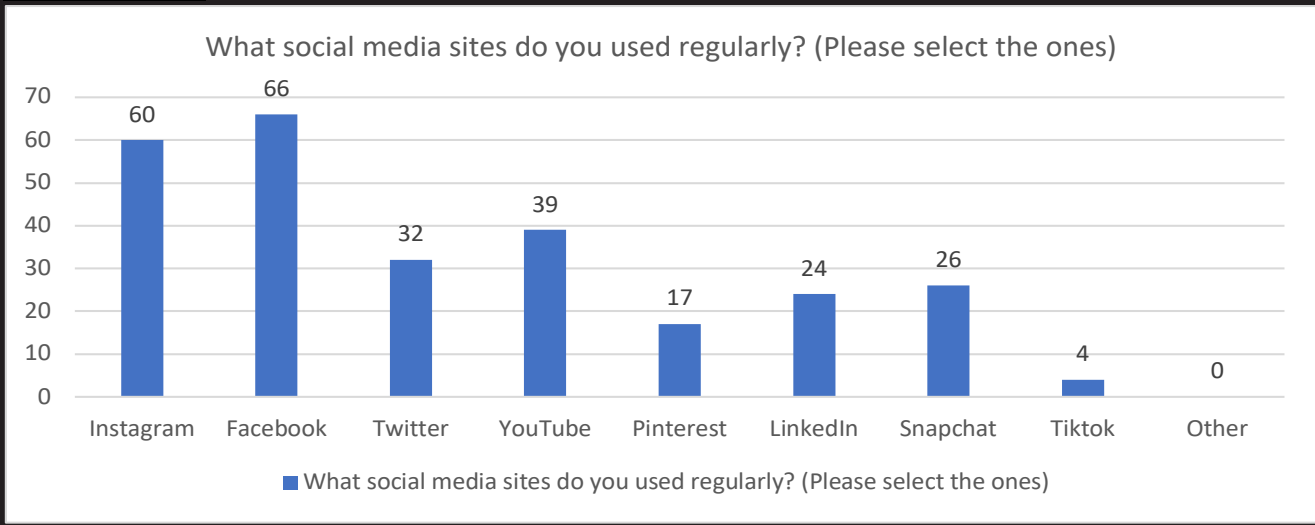
Question One:



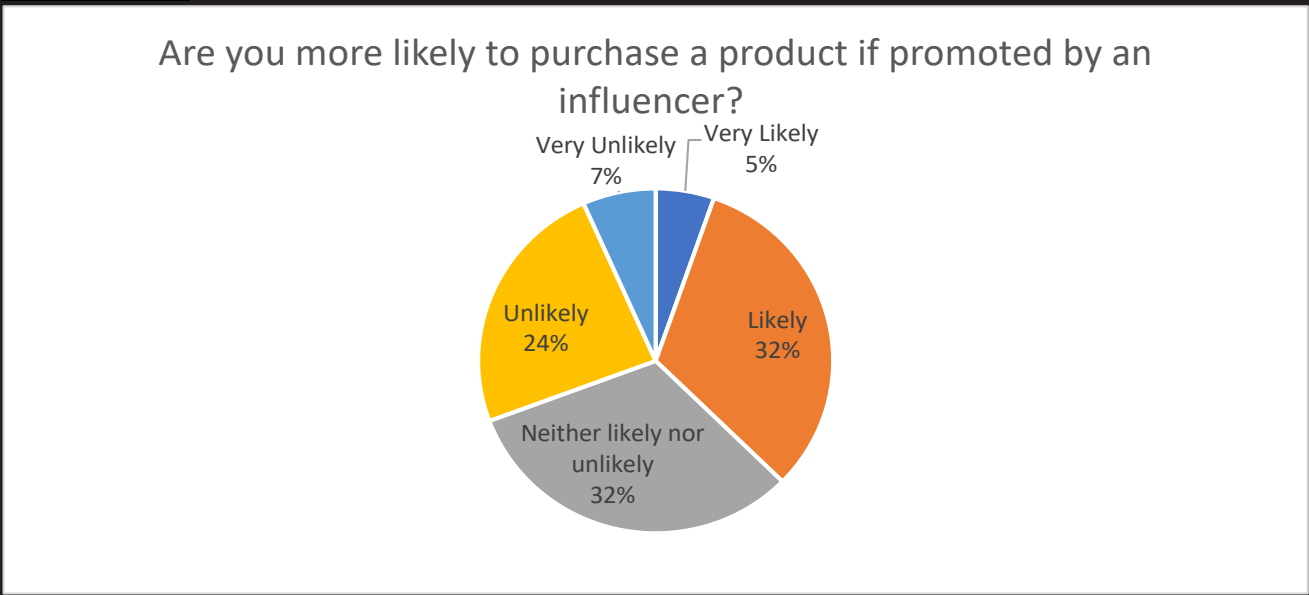
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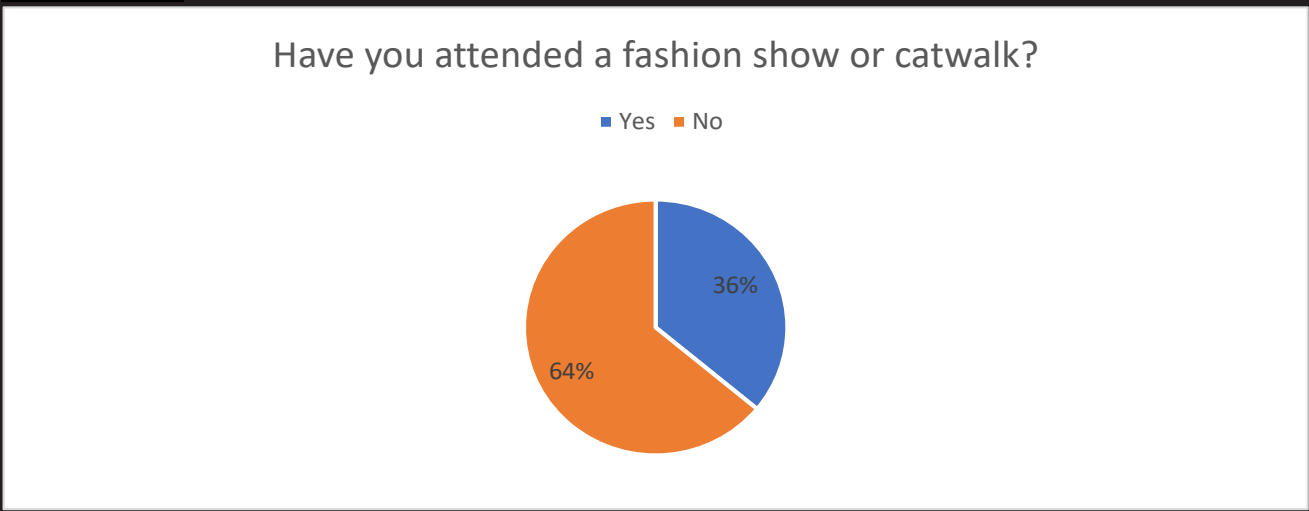
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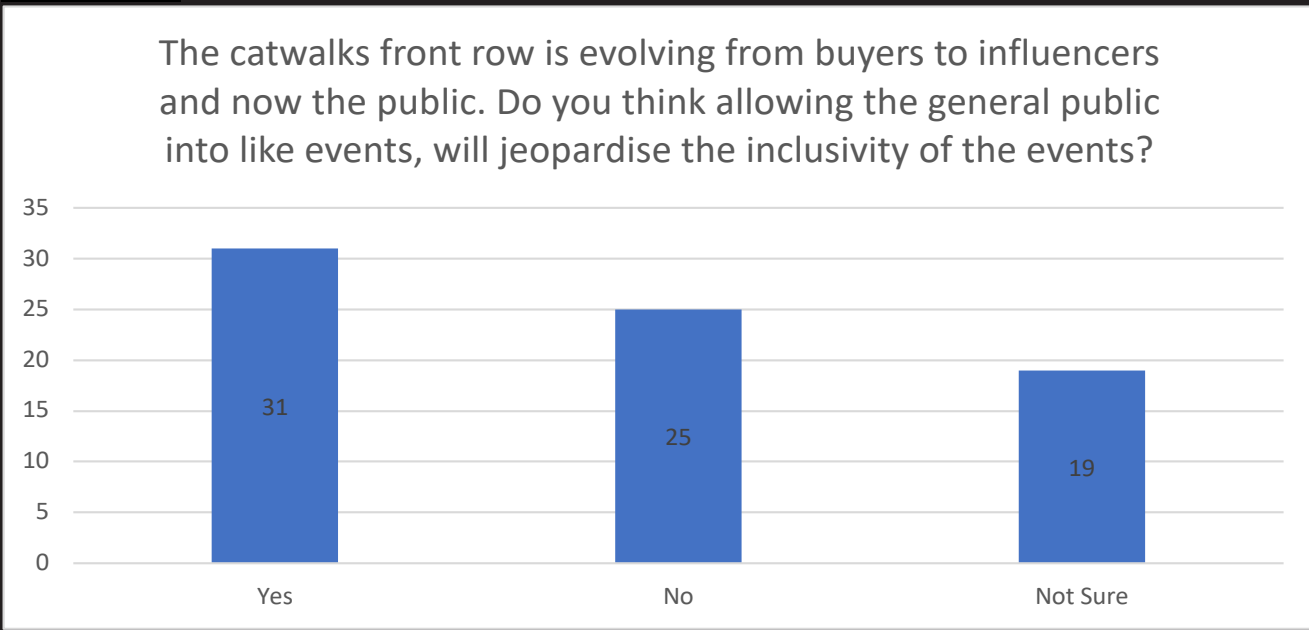
Question Four:



Question Five:



Questions Six:



APPENDIX 6

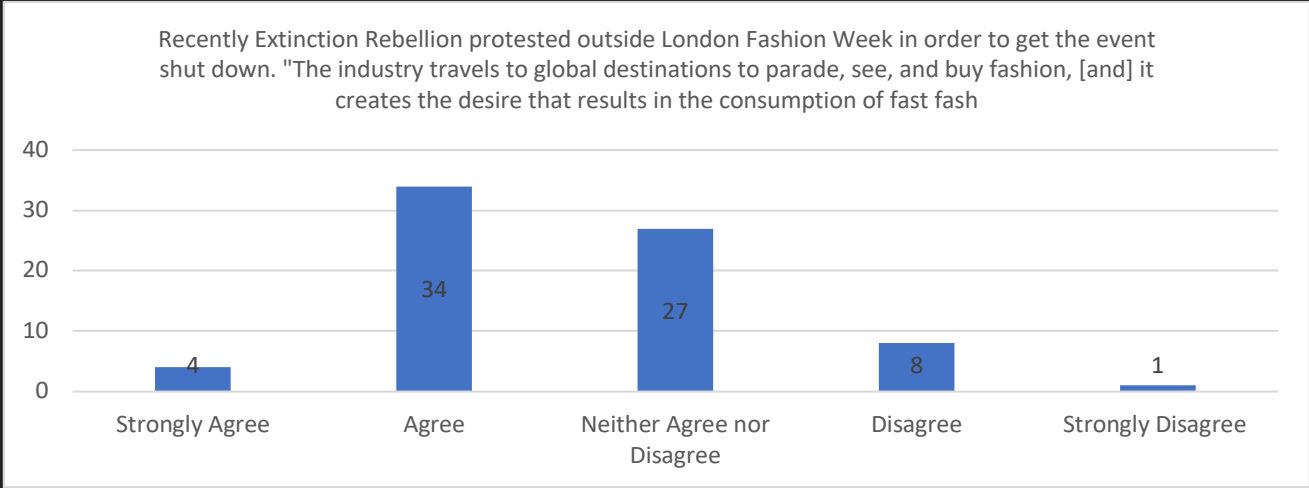
Question Seven:

What are your thoughts about sustainability in the fashion industry?

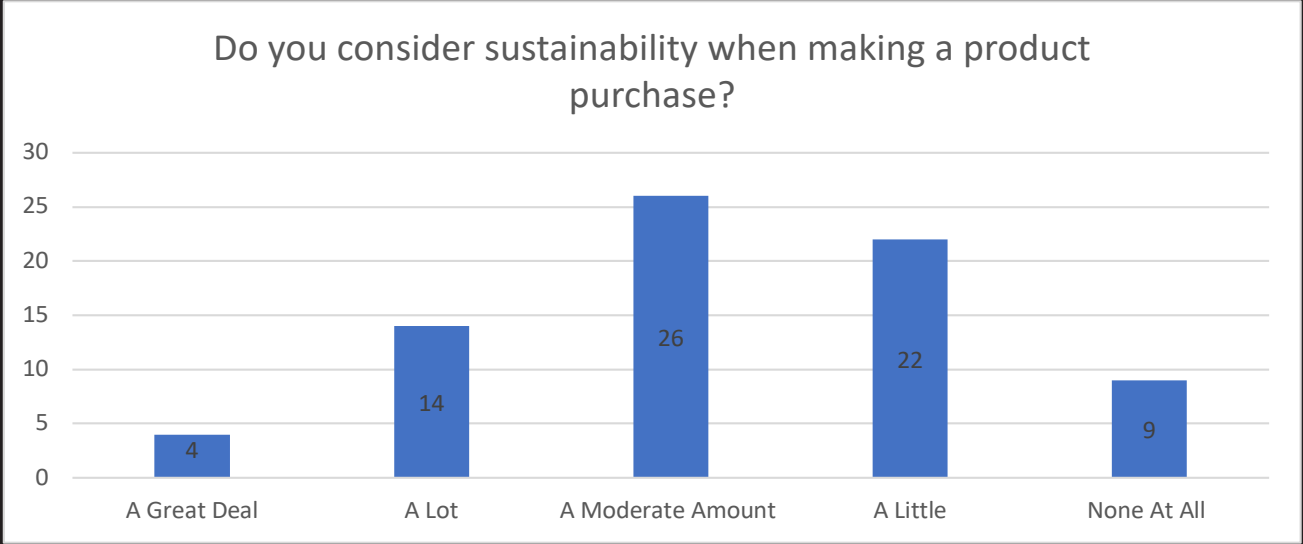
(A selected few answers from the respondents)

- I think it’s definitely taking a turn in the right direction; brands are becoming more transparent which in turns helps consumer think about and be more conscious when purchasing.
- Improvements need to be made, consumers are expecting more from brands
- Sustainability seems to only be prevalent in fashion when Sustainability is the theme of the project
- I think the fashion industry has a responsibility to use sustainable materials or promote trends around upcycling vintage clothing. There is definitely a market for people who want to buy sustainable fashion
- It’s not talked about enough. Would be great if big name brands used made it a priority.
- Too many ‘influencers’ diluting the industry
- I think it should be pushed more. The ultimate future for fashion and should be explored and celebrated more.
- I think sustainability is at the mercy of what consumers are willing to pay for fashion. If sustainability increases production costs but consumers won’t pay higher prices, sustainability will suffer. You can’t force consumers to pay if they don’t want to.

Question Eight



Question Nine:



APPENDIX 7

Primary research

Focus Group with a varied age range and mix of genders. A focus group was conducted as the questionnaire had a wide varied response the focus group allowed a defined selection of each consumer group to be interviewed. These were notes took during the focus group and transcribed within basic form.

Interviewer: Thank you for attending this focus group. The session will include being asked 6 questions, which you are to freely answer. The first set of questions regard to your needs and characters. Firstly, what does luxury mean to you?

Participant 2: To me, luxury is something that’s normally quite expensive but rare or of good quality

Participant 5: For me it’s something that makes you feel good, that makes you stand out the crowd

Participant 1: When I hear luxury, I think of high end, quite pricey but high-quality products including guaranteed good standards and service

Participant 4: Luxury is having something that no one else has, its rare and exclusive

Participant 3: I agree with participant 5, I love the feeling when you buy a luxury product. It makes the feel emotional attached to product- that is what luxury is.

Participant 6: I like the experience of buying the products, buying the products makes you feel special.

Interviewer: (2) In relation to Maslow’s Hierarchy of Needs (image of model shown and explained), what would you say your individual needs are?

Participant 5: I’m at the stage in my life where self-actualisation is really important to me, its finding out who I want to be and what I can do

Participant 2: I agree with you there, I’m just finishing university and I feel like I’m at a stage where I’m finding myself

Participant 6: See for myself, as I’m older I feel I know more about myself but it’s knowing where you belong and having the sense of family and friends around you

Participant 1: I feel I’m between you two (Participant 2&6) as I’m still trying to find out about myself but I really value the people around me and that sense of connection with people around me.

Participant 4: I want respect and recognition from my peers, I feel sometimes as a younger generation we are often dis-missed. The esteem category would fit best within myself.

Participant 3: For me, my needs are security – knowing I’m safe and can pay my bills each month as well as having the right people around me- having that love and belonging.

Interviewer: (3) What 3 characteristics would you give yourself? (instrumental values)

Participant 2: I’d say I am responsible, ambitious and honest

Participant 5: For me, I would say ambition, politeness and intellect are important to me

Participant 1: I would say responsibility, ambitious and independence

Participant 6: My instrumental values are love, self control and capability

Participant 4: I want ambition, intellect and independence

Participant 3: I would say for me forgiveness, love and honesty

Interviewer: (4) What types of terminal values do you have? this essentially means what would you like to achieve?

Participant 1: I value freedom and equality

Participant 3: I value security but also true friendships and mature love

Participant 5: I want to achieve accomplishment

Participant 2: My goal is to happiness and accomplishment

Participant 4: I want freedom and wisdom

Participant 6: I really value security, but also the people around me such as love and true friendships.

Interviewer: We are now moving on to the last two questions. As you all know social media and influencers are around at the moment and with this (5) are you likely to purchase a product if it is promoted by an influencer? So, if you see something that is put on someone’s Instagram stories or snapchat, does this make you want to buy the product?

Participant 6: I would be likely to purchase a product if recommended by an influencer, as I feel I follow influencers that I relate to or look up too. I would trust their recommendations.

Participant 3: I would agree with you there, I feel like the people I follow wouldn’t be promoting a product if they didn’t believe in it.

Participant 1: I wouldn’t necessarily agree with you both there. I feel a bit reluctant to trust influencers as I feel like for there in it for the money and frame. I would trust recommendations from my friends or family more often.

Participant 4: I feel you same as you (participant 1), it’s hard to find what is genuine and what isn’t, where you can trust recommendations between family and friends.

Participant 2: I agree with both sides, I recommend from both influencers and family/ friends

Participant 5: If I’m going through Instagram, I’ve found I’ll use the swipe up links or save items more often than that if I’m interested in the product, however I’m not sure how much influencers influencer me, but I do still value what people around me think.

Interviewer: Lastly, (6) do you consider sustainability when you are making a purchase?

Participant 2: I actually do realise the fashion industry and know the impacts however I consider sustainability only little when shopping, as I get distracted by the clothing and marketing around them. I don’t shop real fur, but I need to put this mindset when consuming clothes

Participant 6: I understand what your saying, I would actually say I consider it a lot however choices are still limited on the market, which makes it hard to shop so sustainable.

Participant 1: I’m actually living a very sustainable life, I’m a vegan and buy a lot from second hand or limit my purchases

Participant 5: I take no consideration to sustainability, I just feel like these other issues that need focusing on and it shouldn’t be took out on the purchasing of products, because you may only buy one or two products a month, which isn’t a considerable amount of waste.

Participant 3: I actually make little consider for sustainability and I do feel slightly ashamed because of this, but it’s struggling where to start. I feel I’m in a similar to your situation (participant 2)

Participant 4: I moderately do, I try as much as possible but will still will impulse buy.

FOCUS GROUP ENDED