

An ethnographic analysis of the slow fashion industry within Denmark

*factors contributing to sustainability in a
highly visible industry*

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Sustainability

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Abstract

This research looked into the emerging role of ‘slow fashion’ within the Danish clothing market and the factors that enabled this nation to become an industry leader. The research employed both primary and secondary research methods, with the secondary research providing supplementary information, to the personal experiences of company heads. The use of theory included text by Veblen, Simmel and Bourdieu which helped to analyse aspects of consumer society and show where there is room for growth. Further to this interviews were used to gain access to information that would have otherwise not been attainable and it was found that Denmark is a great place to be for a brand looking to operate in slow fashion and this has been a development from the successful pioneering of sustainable alternatives long before slow fashion entered the conversation.

Denmark has risen to prominence as a fashion nation in a short period of time and is important to the international fashion community, as they have effectively created a system where importance on sustainability has filtered down from the government to the Danish Fashion Institute and into fashion labels. These authors, mentioned above, helped shed the light in the cultural process of the emergence of slow fashion, but to understand why this has happened in Denmark particularly one also has to take into account the institutional framework. The institutional framework has been invaluable in creating a community that now holds a wealth of knowledge in sustainability in fashion exemplified by the Copenhagen Fashion Summit and the strong cluster of slow fashion businesses that operate in this nation.

The research concluded that it is now common practice in Denmark to address some form of sustainability on a daily basis, whether it be in wind energy, recycling or organic foods. Although ‘fast fashion’ continues to dominate the consumer market economically, the institutional framework and proactive approach to sustainability in other industries has enabled Danes to become familiar with the vocabulary which has provided an advantageous base in the aim to pioneer a slow fashion sector.

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To the Tacos Locos, thanks for providing a space, coffee and guacamole that helped power this research. It will not soon be forgotten. Much love to the F5 crew for listening to my rants and providing local Scandinavian knowledge that has proved invaluable. Finally, big thanks to my friends and whanau all over the world for keeping me in check.

I hope you're proud Mum

Cheers,

Kelsey

Abbreviations

CAGR: Compound Annual Growth Rate

CIFF: Copenhagen International Fashion Fair

CSR: Corporate Social Responsibility

DAFI: Danish Fashion Institute

DANCED: Danish Cooperation for Environment and Development

EP&L: Environmental Profit & Loss

NICE: Nordic Initiative, Clean and Ethical

1. Introduction

1.1. Research questions and importance of Denmark as a study

The fashion industry is one of the most visible forms of consumption in the world and this research analysed the emergence of the “slow fashion” industry in Denmark. The aim is to explore cultural processes find out whether the synergy among Danish designers and the institutions has propelled this change in order to understand how Denmark’s proactive approach to sustainable alternatives has allowed for the nation to become a world leader in the “slow fashion” sector. This research will work under the main question of:

How can the emergence of a strong, sustainable “slow fashion” industry in Denmark be explained?

Within Denmark there does exist a cluster of clothing and textile companies that are actively trying to mitigate the adverse environmental damages from the worlds second largest polluting industry (Business of Fashion, 2016). The slow fashion movement is something that has become increasingly apparent in Denmark with companies aiming to produce slow, well made products in contrast with the rest of the industry obsessed with speed and constant changing trends exemplified by the fast fashion industry (Milnes, 2015). Jonas Eder-Hansen who is both the Development Director at the Danish Fashion Institute and in charge of Nordic Initiative Clean and Ethical (NICE) stated that:

To outsiders, fashion is not known for championing political, environmental or social causes. However, as one of the world’s most powerful industries — and a communication platform with the power to influence how consumers think and act — the fashion industry has a responsibility to create real and sustainable change (Eder-Hansen, 2015).

The following questions have guided my process for this research:

1. How is the synergy among Danish designers / Industry body and government contributing positively to the development of a slow fashion industry?

2. Can the development of slow fashion within Denmark be attributed to Denmark's' history of proactively incorporating sustainable alternatives into mainstream culture?
3. In the fashion sector why is the interaction between brand and consumer important to promote sustainability within the industry?
4. Why has the developments in slow fashion 'style' not contributed to the widespread development of this industry?

1.2. Structure of thesis

This thesis is made up of eight main chapters. The first of these being an introductory chapter which explains the rationale for choice of topic, importance of the fashion industry to the global community and addresses the use of key terminology in the section "slow fashion" vs "sustainable fashion". The second chapter describes the methods used and provides the reader with the justification of why Denmark was chosen. In this chapter I also explain the data collection process and ethical considerations. The next chapter *Fashion in theory*, accounts for the theories present in this research and gives rationale for the main theories being used and how they relate to slow fashion in the Danish setting. The next chapter analyses the Danish fashion industry and is split into four parts containing the main findings of the research. In the section *What is special about the Danish fashion industry*, I explore the identity of Danish fashion and Denmark as a fashion nation. The next section *The importance of the Danish industry and its efforts towards sustainability* analyses the Danish model and what has allowed for a cluster of slow fashion labels to develop. The third section *The Danish society and its collaborative approach on sustainability* focuses on phenomena outside of the fashion industry to explain how synergy has occurred in the Danish society. The final section, *Role of brands and their influence on consumer culture*, looks at what role brands are playing in the development of the slow fashion industry. The following two chapters discuss Danish importance on the development of the sustainability in textiles and problems within the slow fashion sector before finishing with the final three chapters contain the conclusion, reflections on the research and bibliography.

1.3. History of fashion and relevance of topic

1.3.1. Relevance of Denmark as a fashion nation

This topic was chosen as the rise of consumerism and effects of globalisation within fashions landscape are also present within the Nordics. People in this region consume well above the global average and an estimated 145,000 tonnes of textile waste is entering landfills annually. This waste equates to half of new products entering the market annually (Netter, 2013).

The impacts of the fashion industry is not specifically a Danish problem, however, the Danish fashion industry has rose to prominence in a relatively short period of time from the 1950s where it was considered foreign and female, to the diverse and integral part it now plays in Danish society. Denmark is an influential player on the international fashion scene hosting the largest fashion week in Scandinavia with over 35,000 attendees and also plays host to the largest fashion fair in Europe, Copenhagen International Fashion Fair (CIFF) (Albertsen & Mollerup, 2005). Danes are also active consumers of fashion and now are responsible for around 16 kg of textile waste each year, per person (Høst-Madsen et al. 2014). Despite being a world leader in proactively looking to solutions within the industry Denmark has also experienced the change in consumer culture as the increase in access to products and increased outsourcing on the production side has led to severe price competition and the exponential rise of fast fashion retailers (Albertsen and Mollerup, 2005).

Danes consumption continues to rise and the report *Danish apparel sector natural capital account* used the recent Environmental Profit & Loss (EP&L) accounting strategy to indicate the effects that this sector is having on the health of the environment. This reporting technology developed by the Kering Group (Owner of Gucci, Bottega Veneta, Balenciaga and Stella McCartney) is groundbreaking in its ability to factor in environmental costs to a company's bottom line. Profit in this case indicates benefits the companies actions are having on the environment and loss refers to those activities negatively impacting the environment. Applied to the Danish market the report showed significant external costs associated with textile production and consumption stating that et al. "should the sector have to internalise natural capital costs

of indirect land use change, water consumption, air and water pollution and GHG emissions the total cost would be DKK3,390m” (Høst-Madsen et al. p. 17). This cost equates to 11.7% of the total revenue for the fashion sector and is “almost twice the profit margin” of the year the report was conducted (2014), which would result in a net loss for the sector should these numbers be factored in (Høst-Madsen et al. 2014). The findings of this report also showed that The Danish industry is very much reliant on imports of finished products which account for over 80% of market and come from all around the globe. This adds another complex problem into the industry as sometimes these products have limited traceability which is also a common problem in the world fashion industry due to the “global and fragmented nature of the sector” (Høst-Madsen et al. pg 31).

In light of this Denmark has become a world leader in addressing sustainability issues across the board and established one of the first ministries for the environment in the 1970s (Balch, 2013). Looking at the textile industry the nation was also a world leader and conducted research beginning in the 1980s which continued through to the establishment of The Danish Co-operation for Environment and Development (DANCED) in 1994 (Pasquinelli, 2013). These developments within the Danish government, although not always initially successful, led to a three year project assessing the “impact of textile production from raw material to end of life” (ibid). The Danish fashion industry has proven to be flexible and engaged when discussing sustainability and this is driven from the Danish Fashion Institute (DAFI) and its CEO Eva Kruse who is a pioneer in the sustainable fashion industry and the brain behind the largest sustainable fashion conference in the world, Copenhagen Fashion Summit, which attracted over 1000 international attendees from the fashion community in 2014 (Paddison & Gould, 2014).

What makes Denmark an interesting case study is the co-operative nature and proactive approach to sustainability highlighted above. The nation is considered world leaders in addressing pressing issues and as a society appear comfortable in this space having already successfully implemented efforts into sustainable energy, food, transport and recycling. This research sought to explain the development of this phenomenon and how Denmark is approaching the development of slow fashion to become a world leader in this field. As the framework is already in place the next step is to analyse how

this slow fashion industry came into existence in Denmark through the eyes of brands operating in this space. Interviews with locals are beneficial to research as this allows for anecdotal evidence of culture to see if there is something particularly Danish that has the potential to be exported to other nations. These business owners are also at the forefront of change in the industry and the relationship they have with the consumer puts them in the best position to demand change from the industry and it is in this respect that it is important to look at how slow fashion labels in Denmark are handling consumer relations to promote sustainability within the industry.

In the same vein as extensive research has been put into alternative energy, alternative foods and other ways in which we can reduce our CO₂ footprint on the earth as first world consumers, fashion in itself must be addressed as an important topic for society and:

Fashion appears in such redoubtable areas as physical and biological science and mathematics. The domain in which fashion operates is very extensive, indeed. To limit it to, or to centre it in, the field of costume and adornment is to have a very inadequate idea of the scope of its occurrence (Blumer, 1969, p. 116).

1.3.2. Today's fashion landscape

To discuss the importance of fashion it is beneficial to look at clothing as a specifically human characteristic that has a long history within culture and society. Clothing is both decorative and practical although it is not clear which of clothing's uses came first.

Anthropologists believe humans started wearing clothing somewhere between 100,000 - 500,000 years ago and from this point use of different textiles and development of production methods spread throughout the Middle East, Europe and Asia (History of Clothing).

Being highly visible and the second largest polluter behind oil, the fashion industry does have a large amount of power to address global sustainable issues and the role of brands in communicating the impact clothing has on the overall health of the environment is something that needs to be explored from a cultural perspective.

Culture and communication are very closely linked; indeed, culture may even be said to be a communicative phenomenon. In this way, culture has been

explained in terms of communication. The idea that fashion and clothing, as cultural and communicative phenomena, are intimately bound up with matters of power and status was introduced and explained in terms of ideology. Ad the ambivalent response of western societies to fashion and clothing, where fashion and clothing are at once both attractive and somehow repugnant, was explained in terms of a relation to the workings of ideology (Barnard, 1996, p. 45).

The modern fashion world is a complex industry that covers the use of raw materials, the production of goods by designers and manufactures, wholesalers, retailers and advertising. It is an industry that is globally worth US \$3 Trillion (Fashion United, 2014) which experienced steady growth throughout the twentieth century and continues to grow exponentially today. The industry has also experienced continual advancements due to globalisation and developments in technologies which have lead to a shift away from custom made clothing for the individual to the mass produced standardised sizing we see today delivered into stores weekly. Todays fashion landscape is a complex web of integrated businesses that reaches across both developed and developing nations. The increase in media presence and consumers financial accessibility to clothing is somewhat of a new phenomena that has grown to prominence since the industrial revolution.

Globalisation of industries has allowed for mass market fashion to blossom with production of items being significantly cheaper than when clothing and cloth was in fact considered such a valuable form of property that it could be used in itself as a form of currency and frequently replaced gold as a form of payment for services (Crane, 200, p.3). The fashion industry has changed significantly since clothing democratised during the nineteenth century which led to all social classes adopting similar dress as clothing in general became more accessible. The end result of this being the fast fashion industry we are witness to today which has been labeled as the ‘democratisation of fashion’ or ‘bastardisation of fashion’ (Firth, 2014). Fast fashion has been successful in its approach of bringing trend based garments quick to the mass market at a fraction of the cost, but what impacts does this have for rest of the industry? Clothing is now easier, faster and cheaper to produce, and is also easier, faster and cheaper to consume, which has economic advantages from a capitalistic point of view, but also brings a list of societal, ethical and environmental problems which have come to light in recent years.

Increased consumption patterns are having negative effects on sustainability, the environment and exploitation of workers rights in third world countries as highlighted by the Rana Plaza disaster in 2013 which killed over 1100 people (Burke, 2013) and documentaries such as *The True Cost* which explored the conditions of sweatshop workers and how the 80 billion new pieces of clothing we consume each year are produced (The True Cost, 2015). Rapidly changing trends, increased access (purchasing power) and visibility are all cited as reasons for more and more production and consumption not just in the civilised west but also in emerging nations such as China. Despite the recognition of events such as Rana Plaza the current apparel industry is predicted to continue its exponential growth as those in developing nations continue to increase their purchasing power with an expanding middle class emphasised by India and China where the fashion market is expected to grow by 12% CAGR and 10% CAGR, respectively, by 2025 (Ethical Fashion Forum, 2014). The disconnect between consumers and the factors that go into producing the clothing they wear is largely apparent and although this is a large problem it does provide opportunities for change.

Outside of the production side of the business, we have also witnessed significant changes in societal structure since the 1950s and the way people define themselves. Post modernist consumers, as defined by market research categories, contain citizens who classify themselves as ‘upper class’ and ‘achievers’ but more recently have expanded to include the ‘experiencers’ and ‘strivers’. This is a new phenomena which holds a more youthful viewpoint of consumption compared to the “traditional segment of the population” who hold a different set of values more focused towards identity and lifestyle where they are defined more by career and social cohorts (Crane, 2000, p.12). Technological advances have led to employment futures becoming less predictable and also timing of life experiences such as education and marriage have become less uniform. With the rise in disregard between classes and consumption, younger generations in turn have become more associated with leisure activities as a defining point of the self. This has also rolled over into fashion, which has become popular in this context, as a way for people to gain identity and express themselves outside of class and career (Crane, 2000, p.13). Millennials are currently in the spotlight as they consume the most media at in any point in history and also have unstable career options which has lead to fashion becoming a major part of self identity with everything else in life being more erratic, new forms of social and cultural disorganisation (ibid). Clothing

is an important form of communication “but not in the manner of speech or writing; what it communicates has mostly to do with the self, chiefly our social identity as this is framed by cultural values bearing on gender, sexuality, social status, age, etc.” (Davis, 1992, p. 191)

As the fashion industry covers a largely apparent part of society, is a significant employer, creates large revenue streams, generates strong social connections and is one of the most visible forms of consumerism it provides opportunities to research society from various schools of thought. The fashion industry is also responsible for clothing the majority of the population that consider the consumption of clothing a daily necessity that comes with it significant social functions and economic value (O’Cass, 2002). Because of this fashion is an important topic for society as stated by Blumer who highlighted that:

As a central mechanism in forming social order in a modern type of world, a mechanism whose operation will increase. It needs to be lifted out of the area of the bizarre, the irrational and the inconsequential in which sociologists have so misguidingly lodged it. When sociologists respond to the need of developing a scheme of analysis suited to a moving or modern world they will be required to assign the fashion process to a position of central importance (Blumer, 1969, P. 130)

Whether it be in literal sense of purchasing and acquiring clothing or the wearing of clothes that take place after the acquisition, clothing, and for that matter fashion clothing has established itself as an integral part of the creative industry and of our daily lives. The social context associated with clothing has been highlighted by Georg Simmel, Thorstein Veblen and more recently Pierre Bourdieu who analysed the status differentiation functions of fashion (Davis, 1992, p.59). Veblen’s work in addressing the leisure class as an indication of conspicuous consumption showed dress as a leisure activity of the wealthy upper class who sought out the best of the best and “the failure to consume in due quantity and quality becomes a mark of inferiority and demerit” (Veblen, 1912, p.74). Because people hold such strong opinions on fashion and consumption this industry is of high importance and one that could be at the forefront of another societal change towards a sustainable industry, or as one research subject puts it “If Marc Jacobs did it, we would all be buying these clothes” (Joy et al. 2012, p. 286).

It is with this consumer perspective in mind that we look at the importance of the fashion and textile industry today as a truly global phenomena which incorporates a web of interconnected industries, generates 2% of global GDP and employs roughly sixty-million people globally (Fashion United, 2014).

1.3.3. Sustainability in fashion business

Sustainability can be said to be the ability to continue a defined behaviour indefinitely (Daly, 1990) and fashion can be described as the popular or latest style of clothing. Sustainable or slow fashion is a growing trend in the industry and defined with the goal of creating a system which can be supported infinitely in terms of environmentalism and social responsibility (Dickson, Cartaldi & Grover, 2011). As with a lot of trends within the fashion industry, they die out replaced by the next hot thing, however sustainability within the industry itself is something that should be taken seriously due to the significant amount of environmental concerns discussed in the previous section. A number of companies and organisations are setting up infrastructure to ensure that this trend becomes a staple part of the industry in the years to come, an area that Denmark is definitely leading the field in.

The eco-fashion movement is by no means a new movement and the non bleached cottons, organic textiles, including hemp, among others were popular during the 1960s and 1970s hippy movements. The stigma surrounding these early movements has created lasting stereotypes of sustainability in fashion, however these movements did create various initiatives and important research which has led to the development of new textiles and manufacturing methods. Included in this is the development of recycling PET bottles into yarn and zero waste garment construction, which continue to work their way into the mainstream.

However, the continuation of what is considered excessive purchasing habits from consumers is something that is of growing concern and a number of articles published in the *Journal of Consumer Marketing* and *Journal of Consumer Research* now exist that aim to explain consumer culture and purchasing behaviour (Browne & Kaldenberg, 1997). This increased demand for clothing is highlighted by the period from 2000 to 2006 where the number of garments purchased annually per person increased by over one third, and the life cycle of clothing decreased by half (Allwood et al. 2006).

As indicated previously, clothing is cultural and the fast fashion industry, which has grown exponentially, has succeeded in persuading consumers to buy in to a framework of material consumption which “at best can offer pseudo-satisfaction of non-material needs, i.e., generate false sensations of satisfaction while making it harder to satisfy the needs they are aimed at” (McGrath, 2012, p. 8).

The slow fashion industry is trying to address these concerns however sustainability has often been overlooked in the past as nations looked towards capitalism, exploitation of natural resources and labour in foreign lands to increase the profit margin for products then sold locally. This form of society has been critiqued by scholars as highly unsustainable and lead to a significant decline in finite natural resources and an exploitation of human life (Braun & Castree, 1998). There has been numerous initiatives showing how our actions in the developed west are affecting the lives of others and if we look to China the amount of consumption and its effects becomes evident. China “is the undisputed textile and garment export champion of the world” with over 100,000 established garment manufacturing facilities (Fashion United, 2014). China has also been the worlds larger chemical producer since 2010 and it was not until 2014 that they acknowledged problems with the so called ‘cancer villages’ with a plan to blacklist 58 chemicals (ibid).

It is with this in mind that the objective of this research is to pursue the importance of a daily modern necessity, clothing, and how the use of renewables and sustainable production methods coupled with a view to minimising consumption habits could impact the future. This research will explore the social aspects of the slow clothing industry, focusing on how the Danish society established a support network and the interaction between companies and consumers while touching on the economic and environmental aspects as required.

Is it the role of consumers to actively research and seek out labels that aim to ethically and sustainably produce clothing or is it the role of companies to take charge of the situation and aim for sustainability in the industry? Maybe it is the role of industry to demand more transparency from companies looking to conduct business within the nation or maybe it is a combination of various factors. This research aims to analyse what factors have contributed to the development and willingness to engage in slow fashion business, what role the consumer has played in this process and how the

synergy present Denmark has the potential to positively impact other countries developing fashion and textiles as an important industry.

1.4. “Slow fashion” vs “Sustainable fashion”

What is sustainability? The terminology is vague and something that is open to interpretation given the setting in which it is being discussed. Sustainability definitions are not universal and when applied to the fashion industry the term becomes more complex, varies between person to person and has led to confusion within the industry and consumers.

A leading industry body on sustainable fashion, The Ethical Fashion Forum, definition of sustainable fashion is “fashion that maximises benefits to communities and minimises impact on the environment” (Ethical Fashion Forum). As there is a lot of ‘noise’ surrounding the sustainable aspect of fashion and terminology in general, not to mention extensive greenwashing, I have chosen to discuss the topic as ‘Slow Fashion’. This is in an attempt to distinguish this business model from what is currently present in the market with fast fashion retailers who discuss sustainability in terms of using organics and creating efficiencies on the supply side but are ultimately having a limited impact. Organic cotton although eliminating the harmful use of chemicals still requires significant water usage, comparable to conventional cotton, and due to various grades of fabric there is debate that a high quality conventional cotton is better longterm than low grade organic cotton. Mass market products of inferior quality and limited life spans labelled as organic is influencing consumers perspectives of what is sustainable which is why quality and longevity in design is of more importance to speak about. Slow Fashion on the other hand is part of the Slow Movement which is a concept of slowing down processes in an attempt to focus on quality rather than quantity. Much like the slow food movement, slow fashion pushes and promotes the luxury of taking time with design, creation, sourcing and production to produce products that are worth owning and in doing so incorporating “eco, ethical and green in one unified movement” (Dickson, Cartaldi & Grover, 2011). Slow fashion also addresses consumption issues and promotes the longevity in garments use something that is lost in the fast fashion industry who aim to have consumers come back often to shop for changing trends.

The slow fashion movement will be explored in this research through interviews with experts in this field who are focusing on slowing down everything from the design to the production and consumption elements of fashion. This model holds more relevance for sustainable long term change than limiting the discussion to that of organic textiles and technological efficiencies in production which is just one element of slow fashion.

1.5. Limitations and scope of study

One key limitation to this research was the time constraint that affected the researchers ability to gain an interview with DAFI. Due to the fashion schedule, up-coming events and not being located in Copenhagen for the entirety of this research I was unable to gain an interview with DAFI. This research was however focused on the brands and their involvement in the growing slow fashion sector, however it would have been beneficial to strengthen the argument about Copenhagen as a world leader in establishing a slow fashion cluster to have the input of the governing body alongside that of the brands.

Another limitation, was not being physically located in Denmark as I was not being able to spend as much time with companies as I would have liked. Also the lack of knowledge of the Danish language did pose some minor problems when looking into historical documents and trying to obtain primary sources of economic reports and previous research. In these cases it was best to use research already completed in English and take the information from there and refer back to original source, rather than quoting the original Danish text.

A common problem across those interviewed was they did struggle at first to discuss what it was about Denmark that had developed them as people and allowed for these visions of operating a slow fashion label to prosper. As addressed in the above section Denmark is at the forefront of addressing sustainable issues and it did appear that these things had become so common to the culture that it was hard to draw on the changes in society that led to the community present in Copenhagen today. One way I overcame these challenges was discussing my own background and experiences of working in the fashion industry elsewhere which allowed for the interviewees to see the difference and

then discuss societal norms and developments that seemed like common practise to them.

The terminology was also difficult when conducting this research as there still exists, not so much a stigma, but hype in placing the words “sustainable” and “fashion” in the same sentence. In this context it was more beneficial to ask specific questions surrounding longevity and what was the benefit of this compared to just speaking about sustainability. Brands wanted to distance themselves from the big brands talking about sustainability and it created a complex situation when trying to discuss sustainability with people who have greenphobia and were fed up with how the terminology has been used, yet technically conduct business in this space.

2. Methodology

2.1. Research approach

To explore the emergence of a “slow fashion” industry in Denmark a qualitative mixed method approach was applied utilising both background analysis of secondary sources and primary interviews of four slow fashion labels operating in the Danish fashion industry. To conduct quantitative research would have not been beneficial for this research as I was not aiming to achieve representative results. This is something that would be more suited to surface level analysis of consumers purchasing habits, but to explore the development of a cluster of slow fashion businesses and why this occurred in Denmark a qualitative approach explored through semi-structured interviews was more suited. This allowed for a deeper understanding of how the slow fashion industry came into existence in Denmark and drew on both anecdotal personal experiences as well as secondary information regarding Danish history and the development of policy towards sustainability. The primary data, in this case the brands, were chosen in accordance to represent the Danish slow fashion industry and gain a greater understanding of different changes in the Danish society that have not only allowed for people to have a personal view on society but also the freedom and opportunity to explore their views. I also wanted to understand underlying factors and discuss changes in Danish society with designers and often drew on anecdotal evidence that was then supported by the secondary sources. By analysing the brands themselves and the role they play in influencing a sustainable future I was able to see where the importance from the company is placed, how they are dealing with the complexities of using the term ‘sustainability’ and also how they are addressing the consumption problems within the fashion industry which is heavily influenced by constantly changing trends. Because a cluster of businesses is now apparent it was of importance to discuss with these brand owners to see what role they believe Danish society has had on the development of this segment of the fashion industry and their thoughts on how DAFI and the Danish government are influencing culture. Or as Clare Lomas outlined elite interviews allow for the ability “to attain supplementary descriptions of objects and their contexts, and provide the opportunity for historians to engage with their subjects and question their sources first hand” (Lomas, 2000, p. 364).

The brands chosen for this research were a classic menswear label (Armoire Officielle), a bold and colourful unisex label (Trine Lindegaard), an avant grade womenswear label (Beate Godager) and knitwear label (Andersen - Andersen). These brands were chosen as they represented different sectors of the Danish market which allowed for me to gain different perspective and also showed the evolution of slow fashion and sustainability from the 'beige wave' of the 1990s to something that can exist in all areas of the fashion world.

Secondary research was used in this case to gain background knowledge of Danish society enabling me to have an understanding of the Danish fashion industry and culture where I could formulate my interview questions accordingly. By analysing previous research and other sustainable efforts in Danish society that have seen similar synergy, I was able to complete in depth interviews and hold meaningful discussions with experts in the field which would have otherwise been difficult should secondary research have not been included in this report. Secondary research was also an important tool to understand the changes that have taken place in the fashion industry in general around the world and the complexities the industry faces to see if the same things challenges are present in Denmark or what this nation has achieved by choosing to adopt a different strategy. The questions used for the interview process can be found in Appendix A.

The literature used in secondary research focused on both the historical elements of fashion and founding theories such as those explored by Thorstein Veblen and Georg Simmell as well as more modern texts by Fred Davis, Diana Crane and the Danish scholar Marie Melchior. Other texts used were sourced from Blogs, Online Journals and other web based sources both prior to and after the primary interviews took place. Both informal opinion based pieces on fashion and academic literature were used as the industry covers all aspects of society, and it is important to understand both the passive consumer and invested researchers attitudes to fully understand the factors at play in this global industry.

2.2. Study structure

Denmark was chosen as a case study as having worked in the Scandinavian fashion industry, I had prior knowledge that this nation was able to provide sufficient information to complete a thorough research project, something that other countries in the Scandinavian market were not able to do. Denmark has also been a world leader in other aspects of sustainability and I wanted to know whether the development of these industries was something that was having a cross over effect into the fashion industry with peoples engagement on the topic. Also as I am currently working in the Norwegian fashion industry, which is looking to establish, analysing the largest player in the Scandinavian market was beneficial to see how Denmark has grown to prominence in a short period of time while implementing efforts towards sustainability to analyse if there was anything in the Danish industry that could be replicated or exported to another market looking to establish fashion as an important creative industry.

For this research data collection took place in Copenhagen with three of the brands in their head offices. One designer was unable to meet and due to competing schedules and time constraints, which lead to the interview being completed via email. Of interest to the research was what happens when a brand establishes with a sustainable vision and how has the Danish society enabled this industry to develop. Interviews are important for this scope as it allowed for me to understand the Danish culture where fashion plays a large role in society and the impact that fast fashion has had on consumer culture within this nation. Although an analytical approach was used mainly throughout this research, the normative approach of fashion, and designers comments that slow fashion was an ideal model of conducting business in this industry became apparent through the course of the interviews. This drew similarities to practise theory and how societal norms have changed over time which will be explained in the following theory chapter.

The production side of fashion is beyond the scope of this research however it was important to touch on with designers to understand the complexities, the questions can be seen in the appendix, but any detailed analysis will be used sparingly throughout this report. This side of the industry was left out of this research because in Denmark production of clothing is not a large industry and they import 80% of the clothing as a finished product (Høst-Madsen et al. pg 31). Also vast amounts of research exist into the negative impacts of sweat shops and documentaries such as *'The True Cost'* highlight the problems of sweat shop labour in a much more detailed view than would

be allowed for in the time given for this report. The majority of research into fashion also focuses on the negatives of the fashion industry as a large global polluter and the effect it has on societies, so it was important for me to look at a positive aspect, that of slow fashion, to show that there do exist clusters of businesses that are operating in a way that shows sustainability and style are not mutually exclusive.

Fast fashion brands were not included in this research as there does exist extensive amounts of information about these companies through their own sustainability reports providing adequate information. The focus of this study was to see how the emergence of a cluster of slow fashion businesses has occurred in Denmark, thus only slow fashion companies were interviewed.

2.3. Collection and analysis of data

The collection of data took place in two parts which occurred simultaneously throughout the study. The secondary research was conducted predominately in Oslo from the start of 2015, however, in producing this research I had an advantage of being employed in the Scandinavian fashion industry since 2013 as a journalist. This background knowledge is important to note as I have been actively involved in the community long before formal studies took place and the knowledge gained from working in the industry provided the basis for the topic. Upon moving to Oslo and undertaking studies at University of Oslo, I started to formalise the study topic towards that of slow fashion.

The first phase of formal research required settling on a location for study, as the Scandinavian market is too large to complete a masters thesis, I looked into smaller segments of the Scandinavian region that would be able to provide a large enough fashion industry to complete meaningful research. This search led me to Denmark which hosts a growing fashion industry holding the largest fashion week in Scandinavia and a nation that has a cluster of businesses operating in slow fashion. The next step was to speak with my contacts in the Danish market in brief about my topic to see if I had grounds to conduct further research. Following this process and receiving positive feedback I was confident in choosing Denmark. My sources working in the Danish industry also pointed me in the direction of other research and contacts that would help

with the next phase in my research which was to study the history of the Danish fashion industry. This process of looking into the Danish fashion industry started with reading from the 1950's until the present opting finally to include information from the 1980's onwards where the focus on sustainability in textiles became more apparent.

The second part of the research was to figure out in which context I wanted to analyse the Danish market and after discussing with a contact in Denmark and having a personal interest in brand development I decided to analyse the Danish slow fashion market from the perspective of brands operating in this space in the form of elite interviews. The elite in this case were brand owners and designers in the Danish market who were able to comment on knowledge from inside the industry and personal experiences that would have been missed had research focused on the secondary sources. From this point it was important to be specific when choosing brands to approach for interview in order to capture as much of the market as possible and not just focus, for example, on an organic t-shirt company, as the niche aspect of slow fashion has been a critique in the past.

From January 2015 to February 2016 I completed five separate trips to Copenhagen, firstly to establish dialogue with those I would be interviewing at a later date and also to take part in Copenhagen Fashion Week to gain further knowledge of how the industry operates in a general sense. Being based in this location for the largest fashion week in Scandinavia also exposed me to a number of different people within the industry who I was able to speak with about my research and gain outsiders opinions. These informal conversations lead me to other research from around the world and a greater understanding of the complexities within the fashion industry as a whole that provided supplementary background information to my study. When I returned to Copenhagen in January 2016, I attended the Copenhagen International Fashion Fair (CIFF), to experience how brands operate with potential buyers and retailers and also to see the amount of brands that had a focus on sustainability. The representation was still low but being present in Copenhagen during this time was beneficial for the study to view the industry in action.

The interviews that took place after attending the fair were all completed between me and the respondent alone with three of these interviews taking place in the designers studios in Copenhagen and one completed over email due to time constraints and competing schedules the times I was in Copenhagen. Based on the knowledge I had

gained from the background research I formulated an open ended interview guide¹ to both get facts and ask opinions about the fashion industry in Denmark with an angle towards what it is like being a slow fashion label in this country and how Danish society has influenced this development. By keeping the questions semi-structured I was able to tailor the interviews, except in the case of the email exchange, to the designers experience and the individual information they were able to contribute as they each operated in different sectors of the fashion market.

Interviews provided essential information for this research and speaking with people directly involved in the industry provided me with supplementary sources that I would have not been able to access or find otherwise.

2.4. Ethical considerations

As a mixed methods approach was used ethical considerations varied. For secondary research it was important to make sure there was no plagiarism present by citing and referencing previous research as required. For primary research as brands names and elements of their business have been used as a basis of this report it was necessary to make them aware when conducting the interview that this was going to happen and gain verbal agreement that the things we discussed would be able to be used by me, and analysed by me for my research.

¹ Appendix A

3. Theoretical framework

To understand how the slow fashion industry in Denmark operates I made use of five main theoretical approaches. Veblen and Simmel's work with emulation and the trickle down theory provided background for how fashions enter a society and the role the fashion elite can play. Cluster theory was used to explain how a slow fashion industry has steadily developed in Copenhagen, with consumer theory and practise theory indicating how social norms change over time and how consumers mentality is shifting.

3.1. Conspicuous consumption and emulation

The mentality of consuming in due quantity is something that was developed with Veblen's theory of the leisure class as he explored the upper class concepts of consuming the best available products to portray a particular status in society. Dress holds an important role within a society and:

The commercial value of the goods used for clothing in any modern community is made up to a much larger extent of fashionableness, the reputability of the goods than of the mechanical service which they render in clothing the person of the wearer. The need of dress is eminently a "higher" or spiritual need (Veblen 1912, p. 127).

The emulation concept that came from this view of clothing indicated that middle class citizens would also consume in due quantity to appear wealthy and "the motive that lies at the root of ownership is emulation" (Veblen, p. 25). Although over 100 years old *The Theory of the Leisure Class* explored the differences between the Leisure Class and the Labour Class which still holds relevance today as the emulation of fashions elite becomes easier for the middle class consumer.

A key aspect in the rise in consumerism, emulation and conspicuous consumption of fashion is the financial access to clothing due the rise of the fast fashion retailers. On the one hand these retailers have been linked to the so called 'democratisation of fashion' which has lead to fashion being accessible for all as consumers are able to get the latest trends at a fraction of the price, compared to the designer items they are based off. Emulation has become easy for the middle / lower middle class to achieve based off

the fast fashion system but in terms of long term sustainability of environment and industry this is having negative effects. To look at a global scale of fast fashion a recent H&M report shows the company opened more than one new store a day in 2014 and produces over 600 million items annually (H&M, 2014) compared to 450 million products from Zara (Berfield & Baigorri, 2013) and 220 million products from the largest Danish retailer Bestseller (Bestseller, 2014). This is extremely large amount of clothing for just three companies and the model from each is a similar low cost, high turnover model to achieve sales. These companies have achieved enormous amounts of success based on this model and even though H&M is now the worlds largest user of organic cotton (H&M, 2014), the constant feeding of more and new products to the consumer marketplace is of more concern than what textile is used.

Veblen's theory can be applied two fold to this research. On one hand we have the fast fashion industry which is channeling the designer market at a fraction of the cost. Consumers are now able to have the high end designer look without the high cost and because the products are considered "on trend" they do not feel guilty of the planned obsolesce and even fail to connect their fashion choices with their overall views on sustainability (Joy et al, 2012, p. 280). Simmel addressed this trend creation as well and stated that "in countless instances, not the slightest reason can be found for its (fashions) creations" (Simmel, 1904, p. 134). In this framework if products are cheap and it is not significantly understood why things become popular, anything can in fact become a trend. As fast fashion is channeling the designer market, quick, trend based sale is needed for a high turnover of product that keeps consumers coming back for 'the next hot thing'. This has led to increased emulation capability and many young people, as highlighted by a recent study, are using fast fashion for "immediate gratification of continually evolving identities" (Joy et al. 2012, p. 276).

The other side of Veblen's work is the analysis of the Leisure Class and conspicuous consumption which when applied to the slow fashion industry can be seen as the small scale production of these firms and the focus they put on quality and longevity. Consumers in this space can draw similarities to Veblen's theory of consuming the best of the best for status and prestige. Among interviewing designers it was discussed that the recognition of appearing fashionable is still a big factor in peoples purchasing habits and the purchase of a quality garment is something that is still of high importance for

people looking to set themselves apart from the tumultuous nature of the fast fashion industry.

As we have moved closer towards the society we have today and seen the increase in what is considered the 'middle class', fashion has become more complex with consumption at the forefront of society. A growing number of people are living a city life and in this society there is a larger focus on high street retailers. Contrary to what was explored by Veblen, we now however see the upper class buying products from high street retailers, high end designers collaborating with the high street retailers and middle class and lower classes consuming up into the luxury market as well. What is complex about this problem is in Veblen's theory, the Leisure Class only consumed the best of the best, whereas now we have the Leisure Class consuming a range of products which would be thought unimaginable based off his work. There is also the difficulty of communicating to consumers what constitutes a sustainable or slow product. Some labels may use one synthetic textile that is of high quality, durable and made to last a number of years compared to a high street fast fashion retailer using organic cotton to produce the same product which is of inferior quality, mass produced and designed to without longevity in mind.

Fred Davis argued that Veblen (and Georg Simmel) placed too much emphasis on the social class differentiation as the basis for fashion motivation (Davis, 1992, p. 9). However their work did highlight what clothing means to different parts of society and the findings of their research are still relevant today. Although there still exists two extreme ends of the market (luxury small scale production and fast fashion) this research will look at the brands operating in the slow fashion space to analyse how Veblen's theory of emulation can be applied to the rise in slow fashion within the Danish market.

3.2. Cluster theory

Cluster Theory is a concept that analyses how similar businesses excel when operating in the same region. This theory will also be used to analyse why Denmark has become a world leader in the slow fashion sector as a model where slow fashion has continually developed due to the existence of other slow fashion labels in Copenhagen. This

concept can be seen in other area such as the financial sector with businesses clustering together on Wall Street, the cluster of textile industry within Northern England and the tech haven that now is Silicon Valley (Kuah, 2002). Michael Porter concluded that:

Clusters affect competition in three broad ways: first, by increasing the productivity of companies based in the area; second, by driving the direction and pace of innovation, which underpins future productivity growth; and third, by stimulating the formation of new businesses, which expands and strengthens the cluster itself (Porter, 1998).

When applied to the fashion industry, clusters have long existed with high levels of success. The aura of Savile Row in London, Parisian Haute Couture and ‘Made in Italy’ is still present today and businesses operating in this space have each benefited from the competition and continuous innovation needed to uphold reputation. Also the cluster will continue to get stronger as the “concentration and accumulation of knowledge in the cluster will attract increased human capital to the cluster and, since the information exchange tends to be more informal, the spread of knowledge outside the region becomes limited” (Kuah 2002, p. 209).

Applied to the Danish industry the cluster of slow fashion labels operating in this space keeps the knowledge local and also pushes innovation in the industry forward. The other aspect of the cluster which propels growth is that locating in a cluster makes it easier for a consumer to seek out these products and in turn compare price and quality with ease. As the reputation of the cluster increases it will draw more customers as the location becomes a destination for their trade, for example those wanting a fine tailored bespoke suit go to Savile Row.

3.3. Trickle down theory

The fashion world was once dictated from Paris where haute couture houses decided what was going to be in vogue for the up coming season and went about selling these products to social elites and the affluent with the wealth to consume fashion. For the most part of society fashion was not an option and clothing was used as necessity, adapting to what people needed to survive in specific climates. The best known theories from fashion in these days draw on imitation of social elites as explored by Veblen or

the ‘Trickle Down Theory’ which shows that the rich consume and be seen in these products which then, over time, infiltrate other classes in the societal structure. This process could take some time, and fashion could take years or decades to change. Once the fashion was adopted by the lower classes, the upper class would turn their back on this fashion and adopt a new one (Simmel, 1904, p. 135).

Since what is referred to as the “ Democratisation of fashion” larger amounts of the population have the financial means to access goods and recent studies have shown that the importance of social class and dress is becoming less of an indicator of determining trends compared to what it once was. Since the time of Simmel and Veblen there has been significant changes in society that have changed the way trends are created and how the fashion industry functions. The theory of ‘Top Down Fashion’ as presented by Simmel is a problem in todays society where what can be referred to as the lower socio-economic class are still consumers of luxury goods and in turn are responsible for creating their own trends that can influence high fashion and in turn trickle down to the mass market in similar fashion to the way that the upper class influenced trends in years gone by. This theory was used in conjunction with Veblen’s theory of the Leisure Class and was utilised in an effort to understand how fashions have come into existence and the role of fast fashion which Simmel alluded to stating “the more an article becomes subject to rapid changes of fashion , the greater the demand for *cheap* products of its kind” (Simmel, 1904, p. 151).

Today, the creation of trends is a somewhat of a constant process that is pushed by companies through various forms of media. With brands now producing upwards of two collections a year and fast fashion companies delivering new products into stores weekly the environment in which media plays a part in the popularisation of trends has changed significantly, largely due to ‘hype’ and the products pushed out through social media and ‘influencers’ who play an important role in the community as indicated above. The creation of trends and ever evolving new and improved fashion is not dissimilar from that of the electronics industry, where the business is also modelled on planned obsolescence and continual improvements to technology that keeps consumers purchasing on periodically (E.g. Apple and the iPhone).

3.4. Practise theory

Getting dressed is a daily activity with norms and routines implied when choosing what to buy and what to wear (Practise Theory). However, just because people perform this task on a daily basis does not translate to the assumption that they understand the impact of buying and wearing clothes and how this consumption of resources negatively contributes to environmental issues. The general discussion of sustainability has become a daily topic in Denmark and this element of the products lifecycle was discussed with the brands to analyse how they are marketing to consumers to increase awareness in a way that includes the consumer, rather than the segregation that was present during the green movement in the 1990s. Culture and fashion for that matter is a form of communication and:

Fashion, dress and adornment are now to be conceived as some of the signifying practices of everyday life (along with the arts, philosophy, journalism and advertising, for example), which go to make up culture as a general signifying system. Fashion and clothing are some of the ways, then, in which the social order is experienced, explored, communicated and reproduced. As noted above, it is not the case that there is already in existence a society with different cultural groups, who are already in positions of relative power, who then use fashion, clothing and dress to express or reflect these positions. Fashion, clothing and dress are signifying practises, they are ways of generating meanings, which produce and reproduce those cultural groups along with their positions of relative power. (Barnard, 1996, p. 36).

This shows that fashion and what we choose to wear becomes part of who we are as an individual and who we are as part of society. Social Practise Theory employs the human ability to act as an agent of change and when applied to the fashion industry the individual actions of consumers, collectively have the power to enact change if they opt for slow fashion and this form of consumption becomes the new norm. Or as outlined by Bourdieu “the conditionings associated with a particular class of conditions of existence produce habitus, systems of durable, transposable dispositions, structured structures predisposed to function as structuring structures” (Bourdieu, 1990, p.53). Social norms change over time, are influenced by history and “knowledge and ways of behaving are not pre wired into a human biologically nor is the individual dictated by structures alone” (Durrani, 2014). From this perspective, and what has been

experienced through history, fashion can change and consumption behaviours can also change.

As small a topic as fashion may appear on the surface it does cover a range of academic fields, is a highly cultural phenomenon, creates vast amounts of waste and is something that could quickly affect public opinion plus help to alleviate some of the damage done should people consciously address their purchasing habits and make informed choices when they are shopping.

3.5. Consumer theory

The last theory used in this research is consumer theory which aims to study how people decide to spend their money given their preferences and budget constraints to maximise their utility (Levin & Milgrom, 2004). This concept, however, does rely on the rational consumer and when applied to a fashion setting consuming many cheap products can also be seen as the consumer purchasing a range of goods that maximise their options within personal budget constraints, compared to consuming less, but more sustainable products at a higher price point. By analysing the rational consumer with brands operating in slow fashion the focus was on how are they communicating the benefits of consuming a higher priced well made garment in comparison to the fast fashion industry.

This theory was used minimally when discussing consumer habits with brands to complement the research and analyse what happens now that a strong framework and a cluster of slow fashion labels are in place. Fast fashion is still the dominant industry and how to appeal to the preferences of the 'rational consumer' is the next challenge.

4. The Danish industry

4.1. What is special about the Danish fashion industry

After speaking with respondents in Denmark it became clear that the decision to research the slow fashion industry was advantageous for everyone engaged in the clothing industry and those who consume. However before addressing the establishment of the slow fashion cluster it is beneficial to understand Denmark's establishment as a fashion nation which builds on the nations long history of design and trade excellence that now considers fashion a central part of society. Respondents highlighted the benefits of operating business in a nation with strong sustainable values and also the influence they have had being in a place with a strong history in the creative field.

4.1.1. Denmark as a fashion nation

As indicated briefly in the opening section Copenhagen holds the largest fashion week in Scandinavia, however on a global scale the leading cities for fashion have been and still are Paris, London, Milan and New York where the most recognisable fashion houses show their collections biannually. In the case of developing a fashion industry in Denmark, the nation aimed to become the "fifth fashion cluster" and opted not to compete with the large established capitals, but rather be a leader of the second tier (Melchior, Skov & Csaba, 2011, p. 218). Being the largest of the creative sectors turning over DKK 39.7 billion in 2013 excluding retail (Gottlieb, 2014), Danish fashion plays a significant part in the nations economy and specifically of interest to this research is the flexibility of the Danish culture that has allowed for the rise of sustainability within this sector. Despite being an integral part of society and an industry with a high turnover, the Danish fashion industry is still relatively young and the nation considered fashion "foreign, elite and female" in the 1950s (Melchior, Skov & Csaba, 2011).

Fashion is not only something that has come to be very important with self image, in the case of Denmark it is something that is considered central to the nation. Denmark has a long history of design excellence and from the 1950s there has been a significant

struggle within the Danish market for companies to stay in business as they competed extensively with imports (Melchior, 2011, p. 60). After the global transformation of the fashion industry highlighted by extensive outsourcing of manufacturing to third world countries in the 1980s and 1990s (Tran, 2008), the Danish fashion industry was decentralised in 1997 when the trade association changed its membership regulations to accept “whole-sellers of clothing” (Melchior, Skov & Csaba, 2011). This led to the rebirth of designer fashion within Denmark and a revamp of the industry including the re-introduction of Copenhagen Fashion Week by DAFI.

The Danish fashion industry has rapidly changed from the 1950s and seen its significant development in the early 2000s. The report *Denmark in the cultural and experience economy - five new steps ahead* highlighted the fashion industry as an area of importance for the first time and it was here that some of the first fashion strategies were proposed including the proposition of “intensifying the international branding of Danish design and advancing professionalism of design-based companies, including fashion companies” (Melchior, Skov & Csaba, 2011, p. 217). Following on from this a newly developed research and analysis unit in the Ministry of Economics and Business Affairs highlighted the Danish fashion industry as a success and published a report in 2003 which led to not only Denmark's first official fashion policy but also to an extent DAFI which draws its mission directly from the report (Melchior, Skov & Csaba, 2011).

Denmark has become a fashion nation in a short period of time and today the effects of outsourced manufacturing are as present as ever and the largest fashion company in Denmark, Bestseller, alone produces approximately 220 million items per year which are manufactured at 700 different factories across Europe and Asia (Bestseller, 2014). The industry is still small, however, consisting of roughly 620 whole-sellers and approximately 11000 full-time employees. Yet the inclusion of the textile and leather goods industries into the fashion industry make it the fourth largest exporter among the manufacturers (Melchior, 2011, p. 57). Fashion is highly visible industry and this is something that has been used at the political level has been used to promote Denmark similar to the design industry before it and “a single Danish fashion designer’s catwalk show in London can be cause for national celebration” (Melchior, 2011, p. 224). Copenhagen also opened the doors of Copenhagen City Hall for fashion week which

represented a change in the “bureaucratic base of operations” to a “place for fun and surprising events” as politicians and governments have found the representation of being a fashion nation to be increasingly attractive (Melchior, 2011, p. 211 - 223).

4.1.2. The identity of Danish fashion

Before conducting the interviews with brands operating in the Danish market it was essential to understand the identity of Danish fashion and where slow fashion fits into this society. Denmark was discovered to be struggling with an identity paradox in a constantly changing industry, yet being a new fashion centre, by global standards, they have managed to integrate government policy establishing Copenhagen as a fashion destination leading to the establishment of the Danish Fashion Institute. According to research done by Marie Melchior who created a report on ‘What is the DNA of Danish fashion’ she found that:

Both now and historically, it is actually difficult to define Danish fashion in terms of specific style preferences, design methods or clearly defined cultural values that inform the design (or) to put it another way Danish fashion has had an identity problem, a problem of belonging, historically and in an increasingly global world (Melchior, 2011, p. 61).

She continues that the success of the large Danish Fashion companies more relates to the Danes as good trades people which links back to the Viking era (ibid).

The change from class fashion to consumer fashion (Crane, 2000), also came at a time when Danish fashion was being accepted as a legitimate industry. This change in industry led to a rapid transformation into the global phenomena of fast fashion bringing with it the reorganisation of fashion from elite and exclusive to that of young and mass produced. It is at this point in time where Danish fashion started entering the headlines locally and abroad as something independent and no longer a copy of international fashion. As Danish fashion gained popularity the industry became synonymous with functional, quality design at an affordable price — popularised as “Democratic Fashion”. However this terminology is rather generic and not specific to Denmark as a nation but more a generalisation of mid priced fashion.

Although said to be still searching for its identity compared to other established fashion centres, Denmark is relatively young in the scene and what is important with the Danish model is the advocacy and importance placed on both on fashion and sustainability at separate times from the Danish government. This advocacy initially led to a cluster of fashion businesses in Copenhagen with the creation of its first official fashion policy in 2005 aimed at establishing a single vision for the nation and the establishment of network architects, which then led to the introduction of the Danish Fashion Institute shortly after (Melchior, 2011, p. 60). However, the vision which focused on competitiveness in quality and design was not always replicated in the market with the largest Danish companies focusing instead on competitive pricing similar to the models of Intidex and H&M.

Having grown in popularity and establishing Copenhagen as the “Fifth Fashion Cluster” the Danish industry now appears to be on the verge of another shift, that of establishing Copenhagen as a destination for sustainable fashion business. Where Melchior’s work addressed the cosmopolitan nationalist discourse of “catwalking the nation”, a similar approach can be applied to the slow fashion sector. The freedom that DAFI has, although influenced by the government, has been vital in their ability to move from original efforts of establishing Denmark as a destination, to establishing sustainability as a key issue. The establishment of a slow fashion cluster also required strong support networks, investment from government and freedom from those knowledgeable within the industry to develop research and apply their vision similar to how the traditional fashion industry rose to prominence. Denmark’s ability to swiftly incorporate or move from research to action has been pivotal as indicated by the quick rise from research reports to fashion policy to industry body to sustainable focus over the course of a decade.

Following on from the initial efforts into establishing a fashion cluster, a second wave of development has occurred which builds on Denmark’s history of sustainable endeavours. 2007 marked a change in focus for DAFI with the development of sustainability as a core part of the organisation. The importance of the Danish model and how the industry has achieved this cluster will be explored in the forthcoming chapter.

4.2. The importance of the Danish industry and its efforts towards sustainability

Denmark is important to the global fashion community as the nation has become a prominent design destination in a relatively short period of time and has also shown a proactive approach in developing the industry, seeking to integrate sustainable practises which are pushed from the Government, DAFI and from fashion companies.

Sustainable development is key to this Scandinavian nation and Project Manager at DAFI, Johan Arnø Kryger stated, “the sustainable agenda has enormous potential for Danish and Nordic fashion, and if we play our cards right, we can become green growth pioneers in the fashion area,” (Mosbech, 2012, p. 13) There has also been a significant rise of sustainable design being taught throughout the design colleges as they target the future of the industry on the benefits of using sustainable materials as well as the establishment of the Copenhagen Fashion Summit and NICE.

4.2.1. DAFI and the institutional framework surrounding the fashion industry

The synergy among Danes and the support generated from the institutions is something that is special about Denmark and throughout interviews with designers they all communicated that the Danish industry does a very good job at constantly speaking about these issues and making these topics part of everyday conversation.

Since its inception in 2005 DAFI has been at the forefront of Danish textile design and has been influential in its efforts to develop the fashion industry and solidify Copenhagen as a fashion centre as well as working with the government to set up the creative industry as a viable source of economy. DAFI has also been proactive when addressing sustainability with two of the largest projects being the establishment of the Copenhagen Fashion Summit and NICE. DAFI over the last ten years has been highly influential both locally and abroad, the industry, as highlighted in the introductory chapter, is speeding up and rapidly causing more environmental problems throughout the supply chain and post purchase consumer habits. DAFI has been successful in its ability to adapt to the changing fashion landscape, establish a successful fashion hub and develop a framework for demanding more sustainability within the industry and

bringing the conversation to the public. Melchior highlighted the prominence of the institutional framework stating:

Firstly, the government has come to exercise a significant influence on the fashion industry, without market intervention, industry regulation or direct subsidy. Secondly, DAFI, with no clear mandate from its member, but a huge field of potential allies can move from one project to another without limitation in issues or number of projects, as long as eternal funding is available. Unlike a trade association, or indeed, the industry itself, DAFI has the potential for enormous expansion. Thirdly, as the government's policy agenda draws heavily on fashionable management concepts, such as "network organisations," "experience economy," "user-driven innovation," and "corporate social responsibility" which are placed together at regular intervals, the willingness of DAFI to take on new projects advances government legitimacy and increases its chance of being seen as successful (Melchior, Skov & Csaba, 2011, p. 221-222).

The responsiveness of DAFI also led to the establishment of the Copenhagen Fashion Summit, a leading platform, which has brought global professionals in the fashion space together to debate and discuss sustainability concerns. This conference is beneficial for opening up conversation at the minimum and in 2016 will feature speakers such as Burak Cakmak (Dean of the School of Fashion at Parsons School of Design), Anna Gedda (Head of sustainability at H&M), Hannah Jones (Chief Sustainability Officer at NIKE) and Rick Ridgeway (Patagonia).

In just ten years Denmark has successfully intertwined fashion into politics and DAFI's involvement in the NICE initiative to promote a green fashion industry in the Nordic region is well recognised. NICE was established to motivate and assist companies in the Nordic fashion industry to become more sustainable and established a ten year plan with global Not For Profit BSR. The purpose of their plan is to provide a common vision and recommended actions for the Nordic fashion industry by developing creative competencies and engaging both companies and institutions to come up with "innovative solutions that achieve substantial change in the industry" (NICE, 2016). DAFI and NICE are also working with existing businesses to establish plans of how they can change current practises and procedures towards more sustainable methods.

Similar to the young generation who are increasingly not defined by a social class, the Danish industry in itself has taken on these properties and is not being defined from what has existed as ‘the fashion industry’ headlined by Paris, New York, London and Milan. These places are also not without their own sustainable niches but in terms of full industry integration and constant development alongside a large fashion week, Denmark is definitely leading the way.

Conducting interviews with select brands operating within the Danish slow fashion industry allowed for me to gain first hand knowledge as to whether the things DAFI is speaking about publicly are reflected through in the designers opinions. Respondents did agree with the positive impact DAFI was having on the evolution of Danish fashion, however some of them were more intrinsically involved with the organisation than others. Andersen-Andersen, although knowledgeable of DAFI, considered their brand to be separate from the fashion industry as they only produce one core collection. For them the contemplation and doing honest work to obtain the best quality maritime knitwear possible is the focus. Peter Andersen did draw parallels between his company and DAFI and spoke about the positive approach of the institute “which is very good at promoting sustainability” and he also highlighted the openness of the Copenhagen based designers to discuss these issues as key to the constant development of the industry (Andersen, 2016). DAFI has been most successful in opening up conversations and “getting the words into people’s vocabulary”, making it common to discuss sustainability (Andersen, 2016).

Placing sustainability into peoples vocabulary was something that was reflected in my analysis as not only has the country built a high reputation in a short period of time with Copenhagen as a leading fashion city, it has also become a world leader on sustainability within the industry. Since DAFI looked to move in a sustainable direction in 2007 they have contributed to not only the establishment of a slow fashion cluster of businesses but also have in turn enabled Denmark to become a destination for people interested in sustainability in fashion with events such as the Copenhagen Fashion Summit. This is one of the benefits operating within a cluster generates as now the knowledge that is gained from events like these has more potential to infiltrate the Danish market and in turn lead to increased innovation. Because they (DAFI) do talk about sustainability so much it has affected the whole fashion landscape from large

corporates to the smaller artisan labels. Inadvertently Denmark has become a place where you cannot avoid thinking about it anymore and:

If you don't chose to go in a more sustainable direction, I don't think you will survive as a danish brand. Maybe not tomorrow but i think this is where we are. Costume (magazine) started using green and eco codes on all their articles for the readers and other magazines are writing about slow fashion, it is not just only one it just keeps growing. I don't think the consumers are demanding it yet, but demand from within the industry to push these things out which will create demand from the consumers. Which, in turn, will end up impacting the brands that have not yet taken a step towards sustainability to change (Aas, 2016).

Not only has DAFI been influential in establishing conversations surrounding sustainability in the industry they have also been proactive on the sourcing side. Sourcing of fabrics is one of the key issues brands face and this is not specific to the slow fashion industry. Smaller labels especially find it difficult to meet minimum requirements and Beate Godager indicated "I have agencies I am familiar with but they won't help me because I am too small" (Godager, 2016). Suzi Christoffersen from DAFI has been influential in trying to simplify the process for emerging designers launching The Fabric Source in 2014, which is the largest collection of 'green' materials in the North (Kryger, 2014).

Having established the conversation and working to ease the pain of sourcing for designers DAFI has ventured into sharing the knowledge they have gained by hosting educational meetings. Twice monthly they run a free event titled 'DAFI Tuesdays' which is a platform for talks about the industry, often with a focus on sustainability. While Melchior stated the Danish fashion business "has been hailed as a model for successful (post) industrial transformation (Melchior, 2011)," it is the initiatives like this that give strength to this claim. Again, the proactive approach of the Danes take a step beyond highlighting the problems and provides useful resources for interested parties to attend and discover how to find solutions. As attended by a number of students and people working within the industry, these events provide knowledge to the next wave of designers who will come to play a larger part in Denmark's fashion future.

4.2.2. Synergy amongst the Danish slow fashion cluster

Following on from the previous section highlighting the impact that DAFI has had on the development of the Danish fashion industry is to look at the synergy among designers operating in the slow fashion space to see the cohesiveness in how this cluster operates.

The artisanal aspect of slow fashion is not something particularly Danish and there is quality products to be seen the world over, however it is not far from Danish tradition. Denmark has a long history of scientists and a collaborative mentality towards advancement as highlighted by Peter Andersen who stated:

It is part of the Danish mentality to look at something and say we cannot just create waste, lets see if we can do it another way. Engineer something better. It (The fashion industry) does build on an idea in Denmark, in the furniture industry the architect and the carpenter would work very closely together and this idea of craftsmanship is something that has spilled over into the clothing industry with designers now wanting to work closely with the manufactures and sales teams throughout the design and sales process (Andersen, 2016).

This mentality of co-operation has become common among Danes and in a highly competitive industry there was synergy among what designers aimed to achieve. Upon analysing the Danish slow fashion market from the viewpoint of designers operating in various sectors of fashion it became apparent that although they do operate separately and some are more heavily involved in the industry than others, each are seeing benefits of operating within a cluster of similar minded businesses as the vocabulary surrounding slow fashion becomes more mainstream.

All of the brands interviewed established their companies based on being fed up with the pace of the fashion industry and the freedom of full creativity that would be allowed within their own brands. Mostly it was to do with being able to slow down, take their time and produce something they felt was needed in the market place and something of high quality. The framework that was in place from DAFI has not necessarily allowed for these clusters of businesses to occur, but by being present and constantly speaking about sustainability they have emphasised this segment of the market where consumers are now able to explore personal style through a number of slow fashion brands. It is

not just one label that is talking about it, it is many and in an industry currently dominated by quick production and consumption the freedom Danish designers are allowing themselves to slow down is paving the way for change in the industry. As indicated by Andersen - Andersen, who aim to recognise themselves in everything they do, keeping products from market until they are 100% ready is a priority.

Denmark is not a perfect model, but it is very rare to get something right the first time. We only need to look to the tech industry and the constant product introduction and developments there to see that it is a process of constant development. The cluster that is now in place, in addition to DAFI's prominence in promoting sustainability, is giving the Danish industry a competitive advantage in the fashion industry that leads to these continued improvements. As indicated by one report on the benefits of operating in a cluster:

Competitive advantage grows fundamentally out of improvement, innovation and change. Firms in a cluster will gain advantage over international rivals if they could find new and better means to compete with better linkages, knowledge spillovers and innovation (Kuah, 2002).

Should we look to Maloney's 'Law of Diffusion' model² for further analysis Denmark as a nation can be seen as an early adopter with a "willingness to adopt newness and innovation" (Futurelearn, 2016). This model shows the curve up to a point where things become mainstream and the considerable momentum that is required for a product, service or idea to make the transition from the 'early adopter stage' to that of 'early majority'. In completing a course on *How To Build a Sustainable Fashion Business* it was highlighted that this once niche market of sustainable business has been on the move lately and is trending upwards towards the 15 - 20% mark crossing into the early majority stage (ibid). While the industry is certainly on the move and is in constant development within Denmark, this claim is still hard to believe in the fashion sector specifically due to the market share Inditex and H&M control and the continued growth of the fast fashion sector.

² Appendix B

4.2.3. Emulation and conspicuous consumption of slow fashion

To explore Veblen's theory of emulation and conspicuous consumption it is first beneficial to modernise the theory for the current market. The Leisure Class in this case are not necessarily the wealthy but those who command an influential role in the fashion industry. Whether they be the designers showing at fashion week, journalists, buyers, stylists, bloggers or other press these people hold a position within society that has the ability to influence change.

As fashion is a highly visible form of consumption and Copenhagen Fashion Week brings 35,000 people to the Danish capital, this platform can provide a place for emulation to occur, should those 'fashion elite' opt to showcase slow fashion. Upon speaking with designers about the role of fashion week and being present myself during both the shows and fair I was able to analyse how slow fashion designers believed fashion week could influence change and relate this to my own experiences.

This analysis provided mixed opinions, and to look at a global scale informants spoke about the changes that were occurring in the larger fashion weeks with some well known designers opting out of the traditional schedule, bringing products straight to market as they were seen on the runway. This process was established in order to catch the 'see now, buy now' mentality of the consumer but was also a reaction to the fast fashion industry to cut down on the lead time they have reproduce runway trends. The increase in speed to market is in one aspect allowing designers to combat fast fashion, but as has been discussed, the speed the industry turns over product is the issue.

Without allowing themselves the time to assess products before they go into production which is a potentially dangerous path to be on and this could also lead to an increase in waste products, excess manufacturing and companies essentially becoming like the fast fashion retailers.

Informants did not agree on a rethinking of the whole fashion schedule and did believe the rational production of an Autumn/Winter and Spring/Summer collection is something that should stay. According to Kjetil Aas "when you actually look back in time 40 years ago every brand made two collections a year, they made collections that were a lot smaller and more focused which also had a deeper commitment to quality" (Aas, 2016). The opinions were again mixed when discussing trade shows and some

believed it was great for getting the brand out there and actually being to have conversations with various buyers and retailers which enabled to the designer to explain the collection plus the values behind the label. Others believed they already knew the key retailers they wanted to be stocked in so the benefit to them was actually spending the money on traveling to these people, rather than being present at the trade show. The role of Fashion Week is somewhat of a hot topic in the industry at the moment and opinions vary as to what role the traditional runway show will hold in the future. The glitz and glamour of a runway show is something that has become engrained in fashion culture with designers debuting shows bi-annually to crowds of what has become bloggers, celebrities, buyers and media. With the increase in technology and the rise of social media, live tweets, Instagram snaps and various live blog posts are increasing consumers ability to emulate fresh trends, which is why this platform provides excellent opportunity to start addressing the problems within the industry. Denmark has implemented initiatives alongside Copenhagen Fashion Week and received support from the Ministry of the Environment which further strengthens the claim that strong industry integration is positively influencing the evolution of Denmark considers important to its fashion industry.

From approaching Copenhagen Fashion Week and CIFF as a researcher I was able to observe how the industry functions first hand and see the amount of photographers and media attending that contribute to the large amount of press this event generates. Just by being present and observing the amount of attention that fashion week commands, including street style reports of the best dressed at Copenhagen Fashion Week and trend reports published almost a year in advance, it was noticeable that this platform has the ability to create trends and sources of emulation from those considered the 'fashion elite'. Because of this it could also be used to promote slowness or sustainability within the industry if the fashion elite opted to be seen in and started promoting slow fashion. Peter from Andersen - Andersen spoke about people wanting to be recognised for what they are wearing and discerned taste in clothing is one form of recognition. Aside from the environmental benefits, slow fashion has an ethos of quality and longevity and should focus shift to promoting this form of clothing, rather than the latest trend de jour, the bloggers, celebrities, buyers and media are in a influential position to be able to enact change within consumer opinion.

Where Veblen explored conspicuous consumption as the purchase of expensive items to publicly display wealth and income, this theory can also be applied to slow fashion to show how products attain social status. Although previous consumption has focused on prestige, rather than practicality, slow fashion can be compared to the luxury goods spoken of by Veblen and the purchase and public display of these garments can in itself create a social status. This theory, however, was applied previously with what can be considered negative connotations of narcissism and hedonic behaviour, consuming things that may not be necessary to one's life. This is very apparent in the fast fashion industry as people continue to consume numerous products of none or limited value to their life long term. Conspicuous consumption is practised by all income groups and the majority of people will continue to consume, the concept is however about the slowing down the consumption and consuming less, but better quality products which has links to the Danish idea of “not flashing too many riches” (Andersen, 2016).

4.3. The Danish society and its collaborative culture on sustainable issues

Denmark does have a long history of excellence within design and trade, however the fashion industry was something foreign until the 1950s and it wasn't until 2005 that a fashion institute was established was exclusive policy making the industry relatively new compared to the other established fashion centres around the world. Interviewing brands from different areas of fashion and different age groups enabled me to explore what has changed in the Danish society to allow for the development of a slow fashion industry. Throughout my research it was highlighted that not so long ago pollution was not a topic of conversation and now since pioneering commercial wind energy in 1970s the mentality of Danes towards alternative methods of production and the openness to challenge longstanding norms has changed significantly. The following sectors will discuss actions in the Danish market that are helping to shift the consumers mindset regarding sustainability in the garment industry and making it fashionable to be associated with companies that are aiming to evolve beyond production and consumption by implementing aspects of sustainability into their business model.

4.3.1. Changes in Danish society that have lead to increased focus on sustainability

One important aspect that was reiterated in interviews was the development of the organic food market in Denmark. The organic food industry was used by interviewees as an example of what they hope to achieve within the slow fashion space. Buying organic has become simple in Denmark and the change has happened rapidly to a point where organic food now generates a high demand with an array of products now sitting side by side conventional products in stores. The Danish society has transitioned to become accustomed to the availability of these products on the market and just like the wind power industry before it, these aspects of sustainability have become common in the Danish setting. In Copenhagen, especially, around 50% of the population bicycle to work along the 390km of purpose built pathways (Baykal, 2011), the wind industry employs 25,000 people and aims to supply 50 per cent of the countries energy by 2020 (Denmark, 2015). Copenhagen also boasts one of the only harbours in Europe where the water is clean enough to swim in and has an ambitious goal to make the city CO2 neutral by 2025 (Isherwood, 2014). These social practises are a development from both independent actors and institutions that also show how government has shaped culture and opinions. Although the theory helps to address the cluster and social practise, it is the research and development from Danish government that has continued the push towards sustainability and made this a main focus of the country which has then over time influenced society who now see sustainability as a part of the culture.

This continued development towards sustainable initiatives has led to a focused Danish system that also boasts a national sustainability campaign or national action plan which looked to make the largest 1100 companies in Denmark report on non-financial performance as well as pushing out information through public resources which was freely available to inform businesses on benefits of sustainability. This action plan also offered practical management tools to help businesses to reach sustainability goals (The Danish Government, 2014). Sustainable initiatives have also spilled over into the fashion industry and a report in *Ecological Economics* indicated some of the initial strategies put in place by completing ten business case studies of companies operating in the Danish clothing industry. This report found that the institutional framework was present with the establishment of 'The Danish Ethical Trading Initiative' which is a

partnership aimed at “bringing together trade unions, business associations, non-governmental organisations (NGO’s) and companies to promote ethical trade and responsible supply chain management among Danish companies” (Jørgensen & Jensen, 2012). The developments in the Danish market are explored through the Danish vision of “creating a green and sustainable society” which is one of the key goals of the nation (Denmark, 2016).

There has been a common belief that sustainable investments have limited investment returns and a larger input cost, however, a Harvard Business Review study conducted in 2012 concluded the opposite. This study found that “resource efficient companies - those that use less energy and water and create less waste”, will lead to returns above global benchmarks. This text also highlighted that resource efficiency is a leading indicator of economic performance (Heyns, 2012). This is something that has been reiterated with the Institute of Business Ethics which found companies operating “with strong ethical commitments have historically outperformed the average on the Standard & Poor 500 and FTSE 100 every year from 2005 to 2010. (Futurelearn, 2016).

The Danish society still has a large portion of the fashion industry being run by money and these large businesses have to see a profitable idea in changing the way they operate before they will create more than surface level efforts. The development of reports highlighting the economic benefits of resource efficiency plus the Danish governments goals towards creating a sustainable society have lead to the nation leading the world in this field. Tradition is also still important in Denmark and the simplicity from the golden age of danish design is of high importance to Danish fashion designers. Having an engaged population and being a world leader in sustainable advancements, a move of this mentality over into the fashion industry can be seen as a natural development from a society which places a high importance on sustainable development and addresses issues with a positive and proactive approach.

4.3.2. Sustainability a common topic in Danish fashion

These developments outside of the fashion space have led to the population being much more aware of sustainability as an important topic. This is beneficial as when the government starts to speak of sustainability in textiles and institutions, such as DAFI, aim to push through new programs promoting and addressing the issues in the fashion sector, there already exists base knowledge and existing sustainable practises from the broader community that the concept is not a foreign language. The idea of slow fashion and focus on quality has grown naturally from the Danish idea of not flashing too many riches, “people do have nice things but it is very understated and subtle, the quality is somewhere else” (Andersen, 2016). Peter Andersen has lived in Denmark his whole life and seen the changes in society highlighting the Danish mentality that:

People see these environmental issues as something that is beneficial to them and to their society. In the larger market Samsøe & Samsøe pride themselves on self sufficient energy and restaurants see the benefit in using organics and highlighting this to consumers (Andersen, 2016).

In a time where the green terminology has become overused and people have very different opinions, a lot of the times negative or indifferent because of the complexities, Denmark has influenced society from the grass roots level and has achieved community buy in which is very important for future developments. Danes have become used to thinking about sustainability when developing society which fits in with my research findings that DAFI and the government has had the ability to influence change and the freedom to try and explore solutions to the issues within the fashion industry.

Discussing fashion in particular it is now common when these designers are speaking about slow fashion for people to have an understanding and the stigma that was once associated with “sustainability” during the 1990’s is slowly changing especially in Denmark where conversation around sustainability as a whole has become more common (Lindgaard, 2016). Rather than speaking of complexities and initial costs associated with sustainability and quality, the Danish industry sees the fashion sector as an opportunity where they again can become world leaders. Johan Arnø Kryger followed on from his statements on pioneering green growth in fashion and addressed the fast fashion industry highlighting “fast fashion is excessive. We would like to see the four

seasons discontinued. The fashion industry can function well enough with a winter and summer season” (Mosbech, 2012, p. 13).

Even though the leading fashion institute has strong opinions on fast fashion, the problems with the consumer still exist. However the synergy among designers to have similar ideas and the freedom to be able to explore these ideas is more apparent in Denmark. Denmark is up front with a lot of sustainable issues and “is a really good place to be if you are looking to be a slow fashion label, there is other things here that are limited but I definitely think the Danish fashion industry is more aware, here, people will actually ask you if you work with sustainability” (Godager, 2016). Denmark has been an early adopter looking to implement regulatory practices into the fashion industry during the 1990s after surveying the industry the decade before. With product oriented regulation becoming institutionalised in this period, Denmark established a co-operative policy network within the textile and clothing sector funded by the National Environmental Protection Agency which had a strong focus on eco-labelling as a “market-orientated environmental strategy” (Jørgensen & Jensen, 2012). This campaign looked to establish eco-labelled products within the market and aimed to push retailers to “strengthen their focus on eco-labelled textiles and clothing” (ibid). This push from an institutional level was however limited as the fashion industry did not fully support the movement and viewed the labelling program as “contradictory to marketing their fashion brands” (ibid). The research did however show that there is an increased focus on the environmental impacts of clothing from the public sphere which has led to some retailers and brands feeling the need to show their commitment to environmental sustainability publicly, however it was not as apparent as today (ibid). The brands interviewed for my research did not necessarily feel the pressure of public regulation as indicated in the study by Jørgensen & Jensen, but these initial efforts can be said to have influenced them in becoming more aware and upon establishing their own companies, addressing the ‘eco’ side of the business has become a daily practise for them and in turn has influenced the change we now see in society.

Studying the individual action of Danes mentality towards sustainability within the Danish society can show similarities to practise theory as humans act as an agent of change and have managed to influence a society to the point were discussing

sustainability in design is a common practise. Complimentary to the efforts into eco - labelling was the initial efforts into wind power and organic food which the respondents highlighted as important factors in history that have impacted the Danish market and also changed societal opinion. The Danish society has changed over time and with it peoples views on sustainability. It is now hard to not consider sustainability in the Danish society and this is a result of the relationship between the human action and the system (Ortner, 2006). Bourdieu also indicated that these individual behaviours are generated through what society has created as social norms and the slow development of wind energy and then organic food has lead to a society where the individual has become engaged with various aspects of sustainability. From a time when pollution was not spoken of, or understood as an issue to sustainability becoming a common subject, it has been apparent how the society has changed over time. Now when speaking of slow fashion 'the system', in this case DAFI and the Danish Government, has enough buy in from society to create change.

Although it has been a slow process, a lot of initial discussions, research and also failures, Denmark as a nation has believed in the development of sustainable issues and the efforts of the 1990s has helped to expand the prevalence of sustainability in the garment industry. At this point it is now a daily topic of importance from government, to institution and companies operating in the fashion space. It is worthwhile to note these factors above as although Denmark can be seen as an early adopter, things did not always work out and initially they had a hard time achieving buy in from those in the 'fashion industry' who seen it contradictory to what they were trying to sell. It is understandable that companies withdrew from the labelling program initially and made limited efforts in other aspects of sustainability, as even within brands establishing with a slow mentality today, the conversation around sustainability is a very complex topic and can become overwhelming. These initial efforts from the Danish government have however paved the way for the commonness of this topic in the fashion industry.

It is true that what is happening in Denmark is not a particularly Danish trait with slowness and sustainability being topics that are discussed at various levels all over the world. However what is particularly Danish or interesting about the Danish model is the ability to integrate these aspects of sustainability throughout the chain with relative speed. The change, as rapid as it may be, has not been overnight but has required

concerned efforts that have been made by the Danish government, not only in the apparel sector, but in other sectors as well to make sustainability a goal with a set timeframe in mind. They have also implemented the processes to make these goals achievable for the greater community giving businesses something to work towards and providing a framework of how to implement sustainable practises.

4.3.3. Integration of sustainability in a complex industry

In brief, this is one of the most challenging areas when discussing slow fashion, how to create an integrated supply chain through to retail, through to consumer use and disposal. As I have discovered the slow fashion industry, and even the general fashion industry is very complex. There has been significant change in a valued profession that once placed high importance on the interaction between designer and cloth, to one of mystery where even the biggest companies are not able to trace the origin of materials (Amed & Abnett, 2015). The value of a product is now in the consumption.

In a time where there is increased value placed on the consumption of goods understanding why people buy clothes is of importance when speaking about integration of an industry as it is very difficult to fix the problem without understanding the consumer first. They have been exposed to a range of marketing techniques and understanding the consumer, is not understanding what they want to purchase, but a deeper understanding of what they aim to achieve and feel when purchasing these products to create ways to educate consumers on the alternatives available. This aspect of integrating slow fashion is difficult because consumers today are those that have grown up exposed to the most amount of marketing we have seen in history and have become accustomed to the view that consumption increases well being which has been driven from post World War II consumerism. Marketing, capitalism and a lack of stability has pushed consumption habits through the roof. So the challenge is how then do we slow down and integrate a business model that will address all these aspects when you are competing with big business and consumers that only understand what they have experienced. Clothing has been linked to communication and “our social identity” which “at the collective level this results typically in locating them symbolically in some structured universe of status claims and life-style attachments” (Davis, 1992, p. 4). To integrate a model change away from the status quo it is in the

symbolism and life-style attachments that Davis spoke about where focus must be placed.

As consumer culture has been overrun with the newness of things and the mentality “that you need new things all the time” (Aas, 2016) it is of high importance when developing a slow fashion industry to have integration between industry bodies and brands to address the concerns together and figure out solutions of how to create a more sustainable consumer culture that does not lead to 16 kg of textile waste annually per person (Høst-Madsen et al, 2014). Integration is needed and in Denmark the efforts of DAFI in establishing Copenhagen Fashion Summit and NICE is one aspect, The Danish government’s policy on environment is another aspect and the brands taking the initiative to create well made, built to last products is the last step of integration from the industry to actually provide the framework and product to give the consumer the option.

The integration from the industry is significant as it starts the conversation and making sure the industry is on the same page helps address these issues to consumers. In this setting the brands do hold the most power as their products are what the consumers are looking to buy. However to achieve change will require full industry integration as one respondent expressed:

Eva Kruse (CEO at DAFI) is very active, but the crowd she speaks to is select so it’s me as a designer using the power I have to slow down and produce smaller collections and it is about the consumer, not just talking about the issues, but actually taking some action with their purchases and taking the time to understand why a well produced shirt is costing 1200 DKK (Aas, 2016).

4.3.4. Importance of relationships in developing a successful and sustainable slow fashion industry

Many factors go in to designing, producing and selling an item of clothing and upon discussing this process with designers it was obvious that relationships with sales teams, manufactures and retailers is an area of high importance. The respondents spend significant time managing these relationships and even though this process is extremely challenging they spoke very positively of the benefits that having a strong relationship

provides. As the fashion industry moved towards mass market fashion in the last thirty years, manufactures became used to cutting corners and producing things as fast and as cheap as possible which has impacted the way a slow fashion label needs to deal with the factory. The findings of this section do not specifically relate to Denmark or add to an explanation of how the cluster of slow fashion businesses came into existence but it is still important for the reader to note the importance of relationships and the problems slow fashion labels have. This section however will be kept brief.

Starting with the factories, the initial phase requires a lot of back and forth explaining why things are not right and working with the factory until the quality required is achieved. This process can be time consuming but the pay off in building the relationship along the way is to create longstanding trust from the brand and the factory in the beginning so product deliveries in the future will be the quality required. For Andersen-Andersen it was not necessarily a deciding factor to start a company with a sustainable approach, it was more that they wanted to make something that is the best in the world and this process and ethos epitomises slow fashion, high quality, built to last clothing. The relationship with the factory was important for the company, but it was also important to see that the people working there had a good life. The factory they work with in Italy provides workers with a decent living, something not common in other areas of the world. From this point it was easy to build a strong relationship and “the relationship for me is with the whole company and if the factory is paying an honest wage for an honest days work, then the quality will naturally be higher” (Andersen, 2016). There are many problems with the manufacturer and these ranged from lack of transparency for example promising organic products, then not delivering, poor production, long lead times and difficulties in sourcing textiles.

The other side of the industry is the relationships between brands and retailers which builds off a similar mentality of how designers deal with manufactures, focusing on strong communication and open conversations, even in the initial stages. There does exist various retailers dealing with sustainability, but the number of quality retailers is still low. One brand stated they have been approached a number of times by retailers regarding stocking their products but have turned them down because of the misunderstanding of what constitutes sustainability. There is a number of stores whose only criteria is that a product is sustainable in someway, this also includes low grade

organic cotton garments, and placing their item in stores without addressing the aesthetics, or the longevity would have negative impacts on the label, who they are trying to reach and what they are trying to achieve. It is however important to have a good relationship with the retailer and make it easy for them to understand the garments construction as well. Slow fashion may not always be stocked in retailers that are interested in sustainability and this struggle has been experienced by Kjetil Aas who stated “You can see their eyes glaze over when you start to speak about it, so it is important to find other methods of communication to attract the passive consumer and retailer” (Aas, 2016). Here building the relationship is important and it is important for slow fashion to be stocked in regular retail stores as this is where they have the highest potential to change opinions and stereotypes about slow and sustainable style.

One way brands are achieving this is by making it easy for the person selling the product. Using hang tags with care instructions and small print detailing the products composition has proved beneficial as retailers can better understand the product and even on a busy day the tags are very hard for consumers to miss while still communicating the message in a subtle way. The goal is to move things in a slow but steady way, change will not happen overnight but by focusing on building quality relationships these brands are able to slowly change retailers and consumers opinions who are indifferent about these issues and having them naturally buy into the ethos of the company.

4.4. Role of brands and their influence on consumer culture

The fashion industry is integrated through various levels and change is going to be a slow process as benefits of slow fashion are a lot less obvious than those of slow food. As I have discussed the fashion industry in Denmark has been a quick adapter to addressing sustainability concerns and has been a world leader in establishing conversations surrounding the issues on a global level. It is important for the likes of DAFI to address the fashion industry and professionals in that industry as the leaders of innovation with the power to find ways to come up with solutions. It is however also the brands that play a big role in changing the mentality of consumers.

4.4.1. How brands have shaped consumer purchasing habits

The fashion space is becoming increasingly complex and with the development of mega-suppliers it can become near impossible for companies to even know which factories their products are being produced in (Hobbes, 2015). It is in this world where the role of brands in influencing the consumer culture is becoming increasingly important if change is to occur. However, many of the companies operating in a sustainable or slow manner are unable to compete solely based on price and do end up losing a lot of business because of this as indicated by a study showing consumers attitudes towards fast fashion:

Yet, these very same consumers routinely availed themselves of trend-led fashionable clothing that was cheap: i.e. low cost to them, but high cost in environmental and societal terms. They also exhibited relatively little guilt about fast fashion's disposability, seeing little discrepancy between their attitudes toward sustainability and their fashion choices. (Joy et al, 2012, p. 280)

With the constant change in trends and the increased access to fast fashion, consumers are purchasing more than ever and constantly re-inventing themselves with different cheap, throwaway garments. We have experienced fashion dictated by the haute couture houses of Paris and are now heading in the direction of dictator fashion from large conglomerates giving the consumer the illusion of choice. For example Moët Hennessey - Louis Vuitton, Inditex, Hennes Mauritz, The Kering Group and Bestseller all own a number of companies that contribute to the growth of these global parents. These large conglomerates do have a significant impact on the fashion landscape and the large amount of money flowing into them is highlighted by the largest retailer, Inditex and its founder Amancio Ortega who has a net worth of US\$73.5 Billion and is the richest retailer in the world (Forbes, 2016).

Brands play a pivotal role in shaping consumer choices and everyone who wears clothing is whether they like it or not engaged in the industry and efforts towards bringing sustainable issues forward should focus on making options easier for the consumer to access, like organics in food. People want to be recognised for their taste, similar to Veblen's theory of leisure class, for young people it may be a big logo, for someone a bit older they may want to be recognised for the quality, but the principal is the

same people want to be recognised (Andersen, 2016). Changing consumer opinions will not be done with force and a revolution in this industry will come from consumers in their own time when “they see the light” (Andersen, 2016). It is up to the industry and brands to provide the options, knowledge and benefits of adopting a lifestyle less focused on impulsive consumption and placing more investment in purchasing long lasting products. The small brands hold the power in this space as they have the capacity and freedom to explore full creative vision, also, by their nature of being a small business they are generally more sustainable than larger operations.

For this research slow fashion brands were analysed as to what they thought their role was in promoting a change in consumer choices. Again, the synergy among designers was apparent as a factor contributing to the rise of a cluster within Denmark. All believed they play a pivotal role in finding creative ways to talk about these issues with consumers. Andersen-Andersen indicated that consumers do not see the link, the fashion industry is complex and:

One thing is for sure, you will find a small group that put a lot of time into finding organic clothes. However, the majority will use the time to have to buy what they want, if you had the organics next to the conventional a percentage will take the organic, because it is easy, like buying organic butter in the supermarket. I am lazy and I think most people are too, at this point I think most consumers do understand but shopping for slow fashion is not easy for them and this needs to change (Andersen, 2016)

One designer was of the opinion that younger consumers may not be as aware of the problems as the constant introduction of new clothing as popularised by the fast fashion industry is something that is normal for them. She also thought it was her role as a designer to use the power she has to implement sustainability into her business (Godager, 2016). As highlighted in the introductory chapter consumers attitudes on sustainability may exist in other areas, but they fail to see the connection between consumer choices in the fashion industry. The research paper entitled *Nobody Likes It, Everybody Buys It ?! - The Attitude-Behavior Gap in Fast Fashion* indicated in detail the attitude and behaviour gap of consumers towards the once praised industry of fast fashion. This research has highlighted the changing opinions of the fashion industry and those on the inside but it is the consumers who do hold the real key to change and as of

this moment the change is still slow, fragmented and somewhat niche. According to Morgan and Birtwistle young consumers care about being in fashion and they are “the most avid consumers of fast fashion and heavily influenced by the fashion press and media” (Morgan & Birtwistle, 2009, p. 191).

As big as the influence of fast fashion is and their large contribution to what is a US\$3 trillion dollar fashion industry (The True Cost, 2015) there do exist ways for slow fashion companies to change consumer choices and promote the benefits of a slow lifestyle. In this highly visible industry “aesthetics is crucial to the appeal of eco-fashion” (Joy et al. 2012) and this is one of the largest hurdles to overcome with pre-conceptions still existing of an industry based off hippie and simple, non-fashionable clothing. Fashion is tumultuous, style is not. Consumers perceived ideas of individuality is somewhat lacking and it is easy to keep purchasing spur of the moment clothing to remain in fashion without ever having your own style. These markets do play on the younger generations who are hungry for acceptance and instant gratification. The role of brands in the slow fashion industry in Denmark is seeking to change consumer opinion through design and speaking more about style, than fashion, however as realised through this research the average consumer is not aware of the costs associated with producing something of quality and customers still expect cheap clothing (Whitehead, 2015). As much as it is the role of brands to actively engage in ethical and sustainable practises and indicate the advantages of this to the consumer, it is also the consumers responsibility to demand transparency and take the time to understand “that a shirt priced for example DKK 200 at H&M is actually extremely underpriced and something is wrong there” (Aas, 2016).

Essentially throughout the course of my research this is the big problem, people are aware, consumers are starting to realise the impacts of their consumption however they continue to spend money at these large chains making inferior products for quick sale in an ever changing market that they have created. Even within a nation that has existing integration from the institutional level, it is still the consumer who makes the purchase and it is here that brands need to use the power they have to influence consumer purchasing habits. Consumer theory indicates how a consumer chooses a “vector of goods” within a given budget to maximise their “utility” (Levin & Milgrom, 2004). It is at this point where slow fashion labels must appeal to consumers in a way that makes

them think that purchasing, for example, one high quality item has more benefit to them than purchasing two or more items of lower quality.

Retailers have tried to address the concerns of fast fashion garments on the environment and this can be seen to have had some impact as large corporates such as H&M, Zara and Bestseller have all introduced organic lines into their collections. However, this is not enough and the use of organics still leaves us with question over quality and longevity of the garment. Much like Veblen analysed the 'Leisure Class' and their discerned taste, slow fashion needs to continue to place emphasis on the high quality of the garments they produce and market to the influencers within the fashion industry to create the demand from mass consumer society. Also as sustainable consumption is one of the newer environmental concepts and aiming to have people slow down consumption habits is a challenging task, appealing to the rational consumer who wants to maximise their "utility" must also be addressed.

4.4.2. The impact of mass market retailers on the fashion landscape

Mass market fashion can be exemplified by companies such as H&M, Inditex and Bestseller who combined produce well over one billion items of clothing annually. It is these companies that have succeeded in giving consumers fresh off the runway trends at a fraction of the cost, sometimes well before designers are able to debut their original collections in stores (Banham, 2016). This has led to fashion houses such as Burberry and Tom Ford changing the cycle to compete with fast fashion adopting a 'see now, buy now' strategy to limit the time high street has to replicate garments (ibid).

In an industry where the process of having a runway show to debuting a collection in store can take over six months the impact of mass market retail has led to people wanting things as soon as they see them on the runway. We as consumers have become accustomed to the purchasing of constantly changing trends, low quality clothing and low prices, this was not always the case and as is with an industry known for innovation and change this trend of fast fashion can also be phased out. The blurring between high end clothing and cheap alternatives has effected consumer confidence as the term "sustainable" can quickly become associated with H&M as it is the worlds largest user of organic cotton (H&M Conscious Action Sustainability Report, 2014). When a slow

fashion company uses organic cotton and a fast fashion company uses organic cotton to produce a garment it can leave the consumer confused as to what they are actually paying extra for when looking at slow fashion alternatives. This confusion was researched by Annamma Joy in 2012 finding consumers fail to see the difference between a well made high priced product and a cheaper alternative as they cannot see the difference going on behind the scenes (Joy et al. 2012). Corporate Social Responsibility (CSR) has also become another way for companies (through code of conduct agreements with suppliers and factories, as well as statements of ethics on their website) to show consumers that the company is developing better business practices with regards to the way it treats its workers and the environment. The development of these documents has become an important part of a clothing company's website and does indicate that there has been some demand from consumers wanting to make informed decisions, however consumption continues to increase. The fast fashion industry encourages disposability and in common with the technology industry is appealing to consumers impulsive behaviour as well as "employing the planned obsolescence practices" to keep consumers continually returning (Joy et al. 2012).

The clothing industry, with its long history of exploitation of people and resources has recently started to address the issues that have long plagued the industry. This can be seen with the initiatives into CSR and post Rana Plaza transparency efforts, however in Denmark it is a lot more clear with the introduction of policies that run cohesively from government to fashion brands. The fashion industry has a global reach and with a fragmented and complex manufacturing structure there does exist issues of transparency as Beard states:

The difficulty (in the fashion industry) is to see how all the suppliers of the individual components can be ethically secured and accounted for, together with the labour used to manufacture the garment, its transport from factory to retail outlet, and ultimately the garment's aftercare and disposal (Beard, 2008, p. 448).

The fashion industry has become known for its ability to constantly change and influence consumers to purchase trends they had not thought about (Kruse, 2013). The challenge now is how can long-lasting change be embraced when the current model of consuming cheap goods daily is so engrained in the current culture (Tham, 2011).

4.4.3. Role of marketing in influencing consumption habits

When discussing the current fashion industry with interviewees it was relevant to speak about the role that they believe marketing and advertising has had on the increased consumption habits of consumers. The fashion industry has changed extensively since the century of fashion from 1860 to 1960 which was dominated by haute couture (McNeil, 2009), into one where the middle class grew large and advertising quickly came to rule consumer habits giving more power to the media companies and benefiting big business. Paul Gregory in his 1947 essay alluded to profits in fashion coming from “creations” that are not imitated and those producers and sellers which can “control or influence the trend of fashion” (Gregory, 1947, p. 64). Marketing coupled with rapid product introduction has created a consumer who expects new products all the time and in the current market, through the increased use of social media, it is very easy for brands to directly influence their consumer and target market to promote these new products as society has become connected 24/7.

With a modern belief that to have is to be (Dittmar, 1992), and the accumulation and possession of goods becoming an important factor in how one judges themselves, the fashion industry as it stands is an important subject as clothing is a highly visible commodity and one that has held importance for a long period of time. With the ever increasing consumption of fashion products it is also important to look at consumer confidence and what is it that makes a consumer purchase one brand over another. The consumers ability to make a purchase decision is based solely on what knowledge they have pre-purchase and the belief that their “evaluative judgement of the brand...is correct” (O’Cass, 2002, p.874). In saying this then, consumers do have the ability to conduct research into brands before purchase, but a lot of information that they receive is now in the form of advertising. The changes in the industry have largely come from capitalism and the drive to maximise profit margins with cheapest possible input, represented by the large amounts of production taking place in third world nations where labour costs are significantly cheaper. Fast fashion is a completely new subject and advertising has been the vehicle that has pushed the importance of mass consumption to consumers associating product acquisition with certain lifestyles. Ernest Elmo Calkins, a famous advertising copywriter published an article about ‘Consumptionism’ as a concept that was developed in an act to push people to consume

the things they use for a long time (Cars, Appliances, Furniture), like the things they use up (Food, Cigarettes and other perishables), extensively creating artificial demand (Calkins, 1920). Clothing used to fall in to the former category as an investment purchase and one of the most significant changes in society that has led to the industry we see today is peoples opinions on the value of clothing.

Media is one of the most important aspects of the fashion industry and again, technological developments in advertising, public relations and social media have helped to portray the commonly accepted theory that consumption increases well-being (Royo, 2007). Clothing is a cultural phenomenon and similar to the food we eat, music we listen to and religious beliefs it has long been a means of association or disassociation (Davis, 1992). Further to this, marketing techniques have been developed to link fashions with peoples desires, drawing emotional needs into the marketplace as people blindly consume in an attempt to satisfy needs they do not fully understand as our society has transitioned from that of 'being' to a culture of 'having' (McGrath, 2012).

To briefly show how media infiltrates fashion we can look at a modern day classic piece of clothing which entered the market and achieved its global status through the use of media. Denim jeans, with its roots in physical labour and working class men, is one of the best examples of clothing's association changing over time. (Davis, 1992). The popularity of denim began among painters and other artists in the Southwest United States and moved on to motorcycle gangs, leftist and hippie movements all of which contrasted the conservative middle class (ibid). Jeans have gone through many phases (Baggy, Skinny, Selvage, Distressed) and numerous unsuccessful crossover attempts into the mainstream. Largely due to media coverage of these 'denim clad deviants', major sales and public relations campaigns were undertaken in a need to change the image of the denim wearer and break this symbolic linkage. The jean rapidly became a global phenomena following this and one that led to designer denim and increased popularity among the masses. Although an old example, this is one of the best to show how perceptions can be changed through the media³.

³ For further information see *The Century of the Self*
<https://www.youtube.com/watch?v=eJ3RzGoQC4s>

Social Media in the fashion industry, currently dominated by Instagram with 300 million active users (Lorenzetti, 2014), has added another dynamic to advertising as well as developing the concepts of conspicuous consumption and emulation. Instagram, although with a significantly less global usage than Facebook (1.3 billion users), has become a global platform for people, brands and fashion to connect. 96% of US fashion brands are active on Instagram and engagement from followers is 58% higher than on Facebook (LePage, 2015). Brands are using this platform increasingly for marketing purposed through getting behind bloggers and individuals with large followings to promote products at a fraction of the cost of traditional marketing and celebrity endorsements. Blogging has been successful within what has been dubbed the ‘Social Media Generation’ to a level that it has now become a full time profession with some of the top bloggers earning six figure salaries from affiliate marketing (Moffatt, 2015). There are the obvious outliers that don't fit the mould, but today it is important for a fashion company to have a strong social media and online presence as part of their business strategy. The constant presence of celebrities, peers and social elites in the media has increased emulation and we are now connected 24/7 to online magazines, social media, TV and print. This coupled with cheap fast fashion clothing has increased consumers ability to have similar products at a fraction of the cost and always keep up with the trends.

A slow fashion industry is not dissimilar from the regular fashion industry and does require numerous actors across the world to make a finished product and deliver it to store. Because of this the industry will always have some impact on the environment, the goal here is minimising the impact. Comparing the clothing industry to the food industry, however, shows that textiles chain of supply and manufacture is less transparent and more complex (Beard, 2008). The complexities also extend into branding and aftercare of items as well as the fact that time between production, use and disposal of clothing is significantly longer than that of food which adds to consumers dilemmas and lack of understanding as to what constitutes not only sustainable production but sustainable care of a product. For a period of time ethical labels were positioned separate from that of mainstream labels, and appeared mutually exclusive, you can have the fashionable garments or you can have a eco-friendly garment but you are not able to have both. However, The Ethical Fashion Forum highlighted that the sustainable strategies need to transfer to focus on the needs of the consumer and

Denmark has managed to change the consumers image of this stereotype and show that slow fashion has moved on and “the time when sustainability was related to Greenpeace and old hippies is long gone” (Lindegaard, 2016).

The role of the brand does play a large part in influencing consumer choices, and marketing tactics from slow fashion labels appear quite different from those of fast fashion chains. There is obviously a business side associated with being in fashion as well but the design and creation of well made products that are adding value to the market is the main goal. The appeal of good design is still paramount to the development of a slow fashion industry and appealing to the aesthetic preferences of the consumer must come first before having them slowly learn about “the business and benefits of sustainability at their own pace rather than the overly common greenwashing” (Ethical Fashion Forum). This is where Denmark has been effective as the current mentality is sustainability and style should not be mutually exclusive. Opting for sustainable products should not limit lifestyle and should in fact increase well being. This mentality, as explored earlier, is common in Denmark with the introduction of other sustainable alternatives that have been positively received and led to a similar collective approach in fashion.

The marketing of slow fashion does pose problems on both fronts as the consumer can become negative or disengaged if they feel their habits are being personally attacked which has been experienced in the past. It also can pose a problem for the designer as when you do highlight words like sustainability and organic to retailers “they do believe everything to be 120% sustainable, which is not the case” (Aas, 2016). It is however of importance to advertise the ethical and environmental aspects of the product but by communicating in a different way. The fast fashion industry tends to market around the newness of products and trends to keep consumers coming back and slow fashion should focus on the quality and longevity. Aspects of this have been discussed in Malcolm Barnards text *Fashion as Communication* (1996), this book analysed the role of clothing as a form of non-verbal and cultural communication and the difficulty of describing fashions function in a society. Why we wear what we wear has been acquired through our cultural upbringing and this is why marketing efforts vary from culture to culture as some things that are appealing to one, could have very different connotations in another setting. Within the brands interviewed they mentioned that it is still difficult

to buy quality unless you are looking for it and you will not see high quality garments next to those on the high street. This is a problem facing the industry as consumers are usually unable to compare products side by side. Encouraging consumers to become more engaged “in wearing, not buying, of fashion” is a challenge to overcome and “the most effective design strategies will go beyond just using more efficient production and eco-friendly materials to provide ways for us to reconnect with fashion in creative ways that lead to more sustainable consumption” (McGrath 2012, p. 5). With this in mind it is Denmark who can be seen to have systems in place that influence the culture on sustainable issues and the culture of communicating through fashion is something that is beginning to change as those in power start to speak and become very active in appealing to people to take a more conscious approach to their fashion consumption habits.

The power of the brand is still strong and although the cluster of slow fashion labels does exist in Denmark, it is UK based designer Stella McCartney who is one of the most recognised in the world. As one of the largest players in sustainable fashion and an influential figure she believes consumer preferences are changing and “there’s no way that a consumer is not being more informed on that level every day” and continues to say that the “next generation are not going to have it. I don’t think they will” (Amed, 2015). If the fast fashion retailers slowed down, customers would realise that it is rational to shop for the seasons, not for trends, but does this create economic value for these large companies to do so? Even though companies like H&M have incorporated organic textiles and sustainability reports into their business they have extensively stolen the label of sustainable fashion becoming the largest user of organic cotton to produce predominantly a basics collection. In Denmark the largest fast fashion retailer, Bestseller also runs campaigns promoting the use of organic denim to create their sustainable image. By doing this fast fashion companies are saving face with the public but due to the nature of their business manufacturing hundreds of millions of garments annually they are missing the concept of sustainable, let alone slow fashion.

4.4.4. Positive influence of promoting slow fashion

The green wave is not a new concept even within fashion. Sustainability appeared in the 1970s and again in the 1990s where sustainable fashion was a trend “but was very much

a beige, oversized kind of thing and then you had fashion which was this desirable thing” (Aas, 2016). Society has changed, consumers have changed and just as they are demanding transparency from the food industry, there has also been a push, especially in Northern Europe, for increased conversation around the societal and environmental impacts of the fashion industry and a lot more fashion brands who are now starting to deal with sustainability.

As discussed in the previous section brands do play a significant role in influencing consumer choices and it is up to them to use the power they do have if we are going to change and move towards a more sustainable fashion landscape. Where a lot of focus has been on the negatives of fast fashion, the waste, pollution and poverty of workers in the past. Slow fashion is about celebrating the positives of what they do. Promotion of the positive side of the industry is a much more advantageous approach as we have learnt from the last two waves of sustainability that the attacks on fast fashion do not work. People are still shopping, more than ever, and to change consumers mentality the industry must speak favourably about slow fashion and have key figures in the fashion industry talking about the quality and design of the products to create desire. Denmark is achieving this by having a sustainable fashion pioneer at the helm of DAFI and the slow fashion industry must continue to appeal to those in the positions to be able to influence change. By being honest with production and aspects of the supply chain, as well as highlighting of quality to the consumer, the industry can create an aura surrounding these products similar to that of the luxury market. This is a much more powerful way to enact change and the promotion of the benefits of slow fashion allows the consumers to question why things that they may think are common practise are being mentioned, which can start the process of a shift in the consumer mind.

The brand holds power in this space and to establish a clear and strong ethos is of importance to show consumers the benefits and why they should choose these type of products over fast fashion alternatives. Style is something personal and as established clothing is a form of non verbal communication that is of importance to consumers associations within a society, however, the growth of mass market retailers has led to a system in which fashion has become more of a transactional business. Differentiating a brand from the fast fashion space is crucial to the development of slow fashion,

however there does exist a problem in that when companies do grow and appeal to the mass they can become devalued which was highlighted by Bourdieu:

In the case of commercial firms, whose sole target is the accumulation of 'economic' capital and which can only get bigger or disappear (through bankruptcy or take-over), the only pertinent distinction concerns the size of the firm, which tends to grow with time; in the case of firms characterised by a high degree of disavowal of the 'economy' and submission to the specific logic of the cultural goods economy, the chronological opposition between the newcomers and the old-established, the challengers and the veterans, the avant-garde and the 'classic' tends to merge with the 'economic' opposition between the poor and the rich (who are also the big), and the 'cheap' and the 'dear', and ageing is almost inevitably accompanied by an 'economic' transformation of the relation to the 'economy', i.e. a moderating of the denial of 'economy' which is dialectical relation with the scale of business and the size of the firm. The only defence against 'getting old' is a refusal to 'get fat' through profits and for profit, a refusal to enter the dialectic of profit which, by increasing the size of the firm and consequently the overhead, imposes a pursuit of profit through larger markets, leading to the devaluation entailed in a 'mass appeal' (Bourdieu & Nice, p. 287).

Even though it is important for brands to grow and for the concept of slow fashion to spread to prolong the industry, it is also important for brands to address what concerns the fast fashion industry has created in order to not make the same mistakes when establishing a larger slow fashion industry which in turn could devalue the products they set out to create. When speaking of a mass market slow fashion industry it is important to not consider this as something similar to the fast fashion industry but with organic materials and better quality products, as the issues of excessive consumption and waste still exist. Establishing a slow fashion industry is a long term process in which sustainability will more be in style. Style is not synonymous with fashion and is something that "evolves slowly, and reflects peoples way of life; fashion is a chameleon, ever changing, never in vogue long enough to reflect basic tastes and habits" (Gregory, 1947, p. 62). Speaking with brands this sense of personal style is something they aim to appeal to, creating garments that are not following the trends and

fashion of the moment but those that can last through seasonal differences and become timeless pieces of a wardrobe. The marketing of this should appeal to the consumer as a way of investing in clothing as pieces they can use for a long time as a practise of seeking out quality goods.

The shift away from the negative images of sustainability in fashion has been slow but nonetheless important and Patagonia has been one of the pioneers of using media to promote against buying products even going so far as to take out a full page ad in the New York Times with the slogan “Don’t buy this jacket” in the lead up to Black Friday (Patagonia, 2011). In today’s smartphone world the use of brands social media has a huge impact on the industry and this is still increasing. A negative story, for example, on poor production methods will spread quickly through social media and it has forced the big players to work more ethically as they become increasingly under the spotlight (Lindegaard, 2016).

Danish based designers are helping to shift the consumers mindset regarding sustainability in the garment industry and making it fashionable to be associated with companies that are aiming to evolve beyond production and consumption by implementing aspects of sustainability into their business model. Informants thought it was sad that price has become such an important part of not just Danish fashion, but the industry in general. The constant push to lower prices and bring products quick to market is leaving quality overlooked. Andersen-Andersen founder Peter has experienced this being approached by contacts who say “if you do some smart things here” and “make some changes in the business model there” the company will be able to turn a huge profit. They have also been approached by advertising companies asking them to pay to put their product on celebrities for increased brand awareness which he has refused. The refusal to “get fat” goes back to the slow mentality and that development should be natural, if people want to wear and promote the products they should do so because they believe not because they are being paid to do so (Andersen, 2016). This view was also reflected in other brands who were very much connected with their company and dealing with the fabrics, the amount of products, the quality and aesthetics that changing one of these things for initial profit was something they are actively trying to avoid.

4.4.5. Impacts greenwashing has had on the development of slow fashion within Denmark

The greenwashing effect in fashion has brought with it blurred visions of what sustainability even means leaving the consumer tired and disengaged. This has been in conjunction with other misinformation promoting lifestyles through certain fashions which has increased the challenges immensely. Greenphobia and green fatigue is still a large problem and the excessive finger pointing of the past plus radical PETA campaigns and a sustainable fashion industry associated with the hippie movement has not helped. These associations have been off putting for a number of mainstream consumers and is not really addressing the problems within the industry but rather consumer choices who, as established, have generally been unaware of the consequences clothing consumption has on the environment until recently.

Designers were annoyed with what the large companies were doing with the term sustainability and producing a 'conscious collection' is not achieving any meaningful change, it is essentially an image for the company and that for one designer was the essence of greenwashing. Green fatigue is not only for consumers, brands operating in slow fashion also stated they have green fatigue. This portrayal of sustainability is not aiding the cause but is a strong example of how peoples thoughts on issues can be affected by what is happening in the public sphere. The green trend in fashion, similar to that of green energy and climate change has enacted extensive debate with some people stating that the sweatshops or factories in third world companies are doing good as they are providing people with employment and economic opportunities that they would not be able to have if it were not for these factories (The True Cost, 2015). On the other hand it has come to be known that these people work in extremely bad conditions, are forced to work long hours and often live in factory provided accommodation that they have to pay for, which in some cases costs more than what they earn (ibid).

Respondents highlighted that it is really hard for them to understand why people are unable to see that the Western model of consumption and production cannot go on forever and this is the reason why people should care and take notice. Within the production side there is also the mentality that an organic fibre is more sustainable than an conventional fibre. In reality, there are different grades of cotton and a high quality conventional cotton will have a longer lifespan than a low quality organic cotton which

again is challenging to address and why speaking of slowness has become more beneficial to promote sustainability in fashion. The issues of over consumption are steadily entering the mainstream media, however as indicated by the increasing fast fashion market consumers are not rationalising this when making a purchase decision. Consumers are getting fed up with the overuse of these terms and even though at some point they may feel guilty that they are contributing to an industry built on exploitation, they do not experience any of the effects themselves and this guilt can quickly fade. People can become defensive and within the greenwave of the 1990s the “people talking about sustainability and organic cotton were pointing fingers and this does not work” (Aas, 2016). In Denmark, although the issues of greenwashing have been present, the nation has managed to overcome such problems and established sustainability as an important part of society. Referring back to practise theory the Danish society has experienced a shift in social norms and the familiar topic of sustainability is something that has entered the fashion society through the work put in by the Danish government and DAFI.

The current model of production and consumption is broken and no matter how many efficiencies are introduced into the production and supply chain, the fast fashion companies are still adding countless garments to an already oversaturated market and why when large fast fashion companies talk about sustainability the impact is lost. Dealing with cotton and organics when producing a lot of product is making a small change to a very large problem and why designers see slow fashion as the only real alternative. As negative as peoples opinions on sustainability issues may be and the mistakes that have been made in addressing concerns in the past, slow fashion seems to be more taking a personal approach and bringing personal ethos and stories into the fashion world, allowing for the consumer to discover the importance of slowness in construction, care and quality at their own pace.

5. Discussion towards how sustainability can be achieved and Denmark's importance to the development of this industry

Fashion and sustainability is a highly challenging topic and somewhat of an oxymoron with fashion being intimately linked to waste in production and consumption (Gregory, 1947). With the global demand for clothing rapidly increasing fashion ought to be recognised as an important topic and the history of costume which “touches on every issue - raw materials, production processes, manufacturing costs, cultural stability, fashion and social hierarchy” also has the ability to influence culture (Barnard, 1996, p. 21). Fashion also covers aspects of history, economics, anthropology, sociology and psychology, and is also one of the most damaging industries to the environment. Because of this a change in consumption habits can help to slow down a number of other industries outside of fashion. By analysing the product introduction and lifecycle we can see how better quality products can lead to reduced consumption and also the development of slow fashion to become something desirable is changing consumers misconceptions of the industry.

5.1. Product introduction and lifecycle

Product lifecycle is one of the biggest concerns in the fashion industry and in 2013 worldwide consumption of textiles reached 73 million tonnes, however only 20% of these are recycled annually (Futurelearn, 2016). In the periods post WWII it was common for governments and development agencies to promote consumption and the theory that “consumption increases well being” was commonly accepted (Royo, 2007). What impacts does this have on sustainability issues and product lifecycle when the active school of thought emphasises consumption as a practise to increase development? The consumer side of the business has not really been addressed until recently and slow fashion does have an advantage as people become more aware of the environmental impacts of excess consumerism and the benefits of buying products with a longer lifespan. Although it is positive branding wise as people see you making an

impact, it was hard for respondents to know how much of an impact outside of the “fashion circle” these efforts are having. Product introduction, lifecycle and planned obsolescence is not a new topic, however the rates in which things enter and leave the market is at an all time high.

Product introduction analysis showed exponential growth since the introduction of fast fashion retailers. In the traditional fashion industry clothing was typically introduced twice yearly through Autumn/Winter and Spring/Summer collections, now new products enter stores almost weekly. Gregory explained that “creations” are only profitable until they are copied by garment manufactures and one of the reasons fashions are created is so the profits of innovation may be permanent as long as new ideas do not run dry. Those who cannot influence the trend or be first to introduce new design (H&M / Zara), must anticipate future demand to remain profitable. Sometimes they get it right, while those who guess wrong will take losses for unsold inventory. Business in general, however, does not lose from fashions changes, it is the consumer who loses at the end of the day as they are subject to the marketing material of trend creation. This is especially prevalent in the middle and lower income classes where replacement sales make up a large part of businesses priority. Big business stands to gain from the fashion “merry go round” as they make people dissatisfied with their current products and encourage them to purchase new ones (Gregory, 1947). This transition to “intensive capitalisation” of the fashion industry was indicated in Fred Davis’s text *Fashion Culture and Identity* which showed that prior to the mid-nineteenth century styles of dress would take decades to succeed another and minor alterations from season to season was common practise until recently where it is not uncommon for a new style to survive a season or two at the most (Davis, 1992). In this way Veblen’s theory of conspicuous consumption also becomes apparent to address the modern consumer. Business is marketing to peoples desires of wanting to retain status in society and the constant introduction of products means people constantly have to purchase in order to keep up their appearance.

Analysing the current fashion landscape with slow fashion designers it was clear that they are trying to slow down this process and create collections that can last through the trends. As stated, “people want to be recognised” and slow fashion should utilise this longevity of products at the point where conspicuous consumption takes place

(Andersen, 2016). One designer discussed that upon starting his own company the importance was to allow himself to slow down in the creative process and spend more time on each collection to create a clean and timeless aesthetic. By opting out of scouring trend reports and online blogs looking at what's hot, inspiration has come from mood boards and working with small detail changes from season to season. Another designer wanted to make the best sailor sweaters in the world and in developing their own yarn to have the softness of a fine merino, while the toughness to be used for maritime usage, have created long lasting products that are both functional and fashionable. In both cases the brands have established an esteem among those wanting to be associated with quality fashionable attire and this aspect of slow fashion is something that should be spoken about more. Both when addressing consumer theory and conspicuous consumption appealing to the 'rational consumer' with the longevity of products and fashion conscious elite who want to be recognised for taste, consumption habits can be slowed down as people once again place importance on quality.

The problem here, however, which Gregory alluded to in 1947, is if a company creates something to last and the fashion changes the product loses value (Gregory, 1947). Margaret Dana has also commented on this topic and proposed that "if the emphasis is to be upon fashion, and fashions must change rapidly, why then make a garment durable, well made, or of any intrinsic value?" (Dana, 1938, p. 104). Dana continued to say it is much more beneficial for a company to work at low cost, sell the product quickly and trust in the "passing style phase" to keep the consumer coming back for more before they have "a chance to discover or disposition to complain about the basic worthlessness of purchase" (Dana, 1938, p. 104).

This is contradictory to the past, where designers made well produced collections as fashions took decades to change and the "small urban firms sought to acquire prestige and attract clients by associating themselves with the arts" (Crane, 2000, p. 15). The brands interviewed for this research are positioning themselves in a space, opposite from fast fashion and are returning to the association of fashion with art and culture. Today, because of enormous competition in global markets, fashion organisations find it very difficult to establish a quality business and survive which has led to a number of Danish brands competing solely on price with mass production and consumption. " In

this environment, clothing itself is less important than the frames that are used to sell it” (Crane, 2000, p. 15). Now, addressing issues of consumptionism and having people treat products that should be long lasting investments like they treat perishables has diverted a lot of talk away from actually making less, well thought out purchases or addressing consumption as the issue. The majority of discussion today is one of improvements in technological resource efficiency or producing the same or more with less waste (McGrath, 2012, p. 6). This system can be highlighted with H&M becoming the worlds largest user of organic cotton, as mentioned earlier, and it has been highly successful in reaching a large audience. But these sort of developments still address the production side of fashions lifecycle and does minimal to combat the mass amounts of product they put into the market each year. From what I have learnt and experienced from increased consumption and respondents comments on the fashion industry spiralling out of control it can be seen that the other side of the industry, the user stage has not been prioritised. Also “what is arguably the core of fashion - the symbolic rationals behind purchase, use and disposal of the fashion garment” have not been addressed in this model of focusing on the processing stage (Tham, 2011).

A problem to address here, is in the fast fashion space “compared to the real thing the products are so cheap” and it is “tempting” (Godager, 2016). The rise of slow fashion and longevity contrasts what the current industry is offering in changing trends, new products daily and a disregard for quality. Slowing down fashions lifecycle does not mean people need to have limited options and:

Industry ought to provide a wide range of styles at any given time, in order to complement the great variety of ages, physical types, and personalities. But it is not necessary to change fashions every season in order to achieve variety.

Stability of styles is not the same thing as standardisation (Gregory, 1947, p. 67).

To influence the modern market is a large task as it will require a mental shift

from the consumer to opt out of the significant amounts of advertising and influx of cheap products they are exposed to daily and become more engaged in their purchase decisions. If a consumer is able to see the benefit of purchasing a slow fashion item that will have longevity this can appeal to rational consumption habits. Also if you are able to achieve the buy in of the elite, the brand can in turn influence mass culture who look to these people for emulation purposes.

5.2. Change in slow fashion style

One of the most important things when discussing slow fashion with respondents was to address the perceived attitudes towards slow fashion and how they believe these have changed over time. It was also important to speak about what is slow fashion and what does this mean to your business. To elaborate on this, respondents indicated anecdotal conversations with their parents and grandparents who spoke openly and proudly about products they had purchased many years ago that are still in good condition today. Clothing was made to last, trends and cheap replicas did exist but nowhere near to the extent that is present in the market today. This characteristic of slow fashion is not talking about textiles or organics and it is important to note that this is only one aspect of sustainability. Incorporating a range of high grade organic textiles into a slow fashion company is one of the best ways to minimise the impact to the environment, however the importance should be on the quality and longevity of the garment.

Slow fashion is a concept that has more or less evolved from the over saturation of the word “sustainability” in the fashion industry popularised by companies making organic cotton T-Shirts. The large amount of these products on the market has influenced what consumers think when they hear the term sustainable fashion making it important for designers to be specific about the garments to make it easy for the consumer to understand. The complexities of this topic are also apparent on the business side and upon establishing Armoire Officielle, Kjetil needed to take a step back and focus on what was important to him and the business. Producing something of quality and timeless style became of high importance and rather than substitute materials for organics it was a process of realising what sustainability means to him, the power he has now and what he can incorporate into the business in the future. Quality is often an overlooked aspect of the sustainable fashion industry and why the business does not speak about sustainability directly as this can lead to more confusion as we have established with the amount of greenwashing present today. The business will use organics where possible, but substituting a conventional material with a longer lifespan for the use of an organic that is not as high quality is not an option. Longevity is a key aspect in the development of slow fashion and something that should be addressed more than the material used when looking holistically at a products lifecycle.

Another aspect in the change of slow fashion is that of the actual style, the green wave of the 1990s produced a lot of hype around sustainability but in terms of actual benefit to the fashion landscape it created segregation and the image that you can have sustainability or you can have fashion but it was not common to have both. The development of slow fashion is addressing these issues and placing more of a focus on products and bringing something quality into the system rather than the increasingly common low grade organic clothing. Design plays an important role and consumers are not just going to opt for a product because it is using organic fibre or sustainable in some way, they also want something nice that looks good and appealing to this side of consumers purchasing habits is of a priority. Once they like the product having them buy into the ethos and understand more about the materials and why they are important is something that comes as a natural process once they have purchased something they love.

The impacts of greenwashing has also effected the Danish designers interviewed and why it was important to find different means of communication and focusing on style and quality. In Denmark there is now a number of designers who try and deal with sustainability and are aware of the issues, separate from the green wave of the 1990's, this cluster is about creating something the consumer wants and addresses the quality in making that product. Because if it doesn't sell, no matter how sustainable it is, you are still impacting the environment. As fashion is a cultural and communicative phenomena and it is through communication that an individual becomes a member of a group the way slow fashion is presented does hold great importance for the way slow fashion is in turn received and adopted into the mainstream community (Barnard, 1996, p. 29). Previous efforts have been criticised for appealing to small segments of the market and being unfashionable. The shift to speaking about slow fashion is intriguing as product lifespan and quality are concepts that can reach mass market allowing for both sustainable and fashionable.

5.3. Manufacturing and sourcing of textiles

Although beyond the scope of this thesis it was important to address the sourcing and manufacturing side of the business with slow fashion companies to gain an insight into the complexities of operating in this industry. It was important to see how the rise of

fast fashion, quick and cheap production has affected the industry as a whole and why this is something consumers should be aware about when shopping. Slow fashion producers are trying to work with methods of minimising quantity while increasing the quality of the garments they produce. This will in theory be able to minimise the amount of clothing demanded from the consumer. As stated by the Ethical Fashion Forum:

Instead of garments designed and produced according to regularly changing trends at low prices to enable quick profit, the clothing industry must envision new ways of designing and manufacturing that is based on meeting consumer needs with less material intensity (Ethical Fashion Forum).

Numerous bodies of work exist on the production side of the the fashion industry where working towards efficiencies in the supply chain has been the focus. The development of lean manufacturing aiming to eliminate waste from the supply chain has been experienced in the fast fashion industry as well. Lean manufacturing and elimination of anything that does not add value can also be seen as the elimination of quality. If the trend is to change all the time and quality does not affect the consumers purchase decision why implement it? This has impacted the slow fashion industry as manufactures have become used to creating these products as fast and as cheap as possible that when brands ask for something different it becomes challenging for manufactures to understand. The large scale production of fast fashion is also affecting the market as it is difficult for small establishing labels to meet minimums and find manufactures to build relationships with. All designers I spoke with highlighted that production is where the most difficulty lies and it is a long process to firstly find a manufacturer and then to achieve the high quality “in the beginning you really do have to fight”(Aas, 2016). This view was reflected with Peter at Andersen-Andersen who worked through a four year process of wool development as there was not the quality they wanted available on the market. The sourcing of textiles is a large issue, as it is still really hard to get high quality organic cotton and the process to get to where these labels are has taken significant time. The work put in by those at DAFI to establish sourcing networks is aiming to ease the pain for those new designers and this is one area which could have significant potential to change the market as if it is easier for labels to source high grade organic fabrics we should see an increase in those opting to use these

materials. Just as industry should make it easier for the consumer to purchase slow fashion, it should also make it easier for the designer to create slow fashion.

The purchasing power of a consumer is rationalised when they can buy a cheap product from H&M, but upon the conversations with designers it is clear that the product is cheap because manufactures have cut corners and they don't care if one seam is a little bit out of place as the products are made for quick sale and repeat business. Essentially the companies that buy these products do not put importance on this. The consumers tend not to see the effort that someone with a quality focused mentality has put in when dealing with suppliers to achieve a high quality product. Redeveloping a quality focused approach is something that is achievable by slowing down. Slowness, however, is not a goal, but a product of wanting to make something worthwhile; "I would love to make a home cooked gourmet meal in 10 minutes, but that is not possible. If you want something of quality, it takes time" (Andersen, 2016).

5.4. Importance of celebrity and elite endorsement

Veblen's leisure class and the emulation concept is still relevant in today's market and from the 1950's there was a big marketing push on consumption as the way to achieve the good life. Where these methods focused on big budget celebrity endorsement and association of products with certain lifestyles, the change in the industry and rise in use of social media has led to a focus on blogging. This is now a full time profession and bloggers can now earn upwards of six figure salaries for their work in promotions of products (Moffatt, 2015). Anyone can blog and creating a large online following as well as handling companies products is one way that business is pushing fashion to consumers through emulation, not of the wealthy, but that of the fashionable crowd. These people can be classified as niche celebrities and social media has been highly successful in product promotion.

People consume the most amount of advertising in history and celebrity endorsement can also be used to promote sustainability. However brands operating in this space are often subject to more criticism with common misconceptions that things are "120% sustainable" which in reality is not true and can create distrust from consumers (Aas,

2016). Essentially when you classify your brand in this space you are putting yourself further out there than brands operating in a conventional format. It is difficult for sustainable labels to use celebrity endorsement as celebrities promote various brands, but as soon as they become associated with something sustainable everything they do becomes criticised as highlighted by the “I would rather go naked than wear fur campaign” (Telford, 2014).

This is why when it comes to slow fashion it is more beneficial to talk about the process, the textiles and the quality as these are ideas that still allow for flexibility in public and personal opinion without putting sustainability on a pedestal. Celebrities should use their power to talk about pressing issues and Pharrell Williams is rapidly becoming one of the most important figures in promotion of this industry. Widely regarded as one of the most fashionable men in the world and a fashion icon for many Pharrell was approached by Bionic Yarn, a company operating in recycled PET plastic from the ocean waste. Joining the company as a co-founder he has been influential in establishing partnerships such as the one with G-Star Raw to create a “Raw for the Oceans” collection using this recycled fibre. Employing his voice for positive he has managed to stay away from the criticism seen in the past and is having an influential role in bringing sustainable issues into the mainstream in an effort to change the way consumers view sustainability topics. It is at this stage very small scale compared to the global fashion industry, but his voice is heard the world over and this is highly influential in changing consumer opinions and inspiring other designers to take action.

Discussing the issues of celebrity endorsement within the Danish market, this was an element that is still lacking locally and the importance of starting the conversation is needed:

The more we talk about plastic in the oceans and the more awareness there is, even if it is from a fashion company and the small amount they take, it starts to be in your vocabulary that it exists and that's the beginning. I do not think they (Bionic Yarn) make a change physically, but they start a mental change from a wider audience which is very important (Andersen, 2016).

On a global scale large creatives have spoken out about the pressures of the current system and this, again, is starting the conversation. The more people address these

issues the more people will understand that the industry is spiralling out of control and there is a need for change however the use of these methods in Denmark to influence the consumer is somewhat limited.

6. Why is slow fashion not as universal as fast fashion

6.1. Changing attitudes towards fast fashion

After discussing with businesses it did appear that attitudes toward fast fashion have definitely shifted among those in the industry and there was synergy among Copenhagen based designers and the fashion bodies about addressing these issues in some way shape or form, but the next challenge is to communicate to consumers in a way which will have them demand more from retailers and the industry.

Attitudes from the interviewees were not company specific but more angled towards the speed in which the industry has become accustomed to and although fast fashion is popular it is also extremely wasteful and tarnishing the reputation of the fashion industry as a whole. Havas Media Lab Director, Umair Tarique says:

If you're still seeing your business essentially as a giant factory producing outputs, instead of as a system that creates real, positive human outcomes—you're stuck in the industrial age, while the rest of the world, especially your customers, are beginning to take a quantum leap into the human age—an era where a life meaningfully well lived is what really counts.(Futurelearn, 2016).

This view was reflected in the interviews as it has become black and white for designers that slowing down is the only way to go if you want to make something of quality. Having previously held opinions that large corporations did play a significant role if we are going to make major changes, Kjetil Aas now believes “no matter how much organic cotton these companies use, they can not become sustainable as the large quantities of production in itself is not sustainable” (Aas, 2016). This is why it is important for him and the other companies operating in this space to actively promote slow fashion and speak about this aspect of design, rather than sustainability, as slow fashion deals more with the process and ethos of a business to slow everything down in the fashion cycle with a focus on design, quality and smaller collections rather than just speaking about organic material which can be misleading.

The Ethical Fashion Forum also addressed the issues of communicating the impacts of fast fashion to the mainstream consumer. They believe that consumers who are not already engaged in buying “green” products will have a hard time buying into brands promoting extensive information about environmental benefits, as fashion is mostly about personal beliefs, desires and having fun. Marketing efforts, should focus around these aspects. A study into attitudes among fast fashion consumers again posed similar problems as respondents were generally aware of the issues and conditions fast-fashion is produced in but when it came to the purchase of clothing, they shopped at these places anyway. Respondents believed they alone could not make a difference and stated lack of money, wanting to remain on trend and “not looking like a Grandma” as reasons for frequenting fast-fashion retailers (Düffelmeyer, 2012, p. 22).

The cluster of designers in Copenhagen are aiming to address these issues and were all of the mentality that this is not a healthy fashion system and it is spinning out of control. It was important to note their understanding of the current fashion landscape, knowledge of where sustainability in fashion has gone wrong in the past and how this can be fixed. However there still exists a gap between consumers knowledge of fast fashion and their actions which is why in the Danish case the synergy from industry body and slow fashion brands is important to establish a market providing alternatives to consumers that are easy to access.

6.2. Why are people not buying?

It has also been established that although people may say they want something sustainable, a lot of the time this does not translate to shopping habits because purchasing slow fashion is still difficult. For the majority of the middle class and upper class shopping has become a leisure activity and the passive consumer market is where the most attention is required. The small amount of consumers that are seeking out sustainable alternatives are already engaged and this is one of the problems the slow fashion industry is encountering as it is still a niche segment and difficult for consumers that are not fully engaged in these topics to find information let alone products.

The way we consume fashion has changed and a Swedish study into fast fashion analysed young consumers perceptions versus shopping habits applying the “Standard

Learning Hierarchy” to the fashion industry (Düffelmeyer, 2012). This study also bore some similarities to what Calkins was discussing with consumptionism, as fashion was considered something with a high-involvement from the consumer employing a traditional “think first, feel next, act last” approach to the decision making process of a purchase (Sheth & Mittal, 2004, p. 204). Since the introduction of fast fashion this mentality has changed and although frequenting fast fashion stores the consumer can be now seen to have a low-level of involvement in the decision making process with research about these products being a “waste of time compared to the relatively low investment” they would make (Düffelmeyer 2012, p.11). The low cost of fast-fashion products encourages people to buy now and think about it later resulting in increased consumption and excess waste which has grown alarmingly in the last 20 years since fast fashions introduction (The True Cost, 2015).

The time saving innovations of society have led to people wanting things immediately and this speed of society has also crossed over into fashion. If a consumer wants something they are not going to wait and they are not going to seek out an alternative when the price is so low. The modern consumer has become accustomed to this speed and slowness in itself is not an advantage, but to produce something of quality requires a certain amount of time and as discussed often the consumer fails to see the difference.

The modern consumer can also be seen to be lazy and lacking confidence in the fashion market. This is understandable as the problems are complex and information about products is not always clear. When Business of Fashion looked in to Inditex they found that the company, although active in addressing its impact on the environment, still produce upwards of 900 million garments each year. Also on top of the twelve million kilograms of industrial waste produced annually and the doubling of water usage between 2009 and 2013 the company is unable to trace the majority of the cotton it receives. Inditex indicated themselves that smaller businesses are more “ideal models of “sustainable fashion”, however they “lack any real influence on the suppliers that feed the global industry at large. And most people aren’t buying their clothes from small businesses - they’re buying from places like Zara” (Amed & Abnett, 2015).

The consumer can also be seen to be resistant to change which is not a new concept for anthropological research and is also not a new concept for fashion academics with literature dating back to 1860 addressing the impact clothing has on a society. It wasn't

until the 1960's and the rise of the flower power movement that an industry dominated by haute couture and dictator designer fashion was challenged (McNeil, 2009).

Sustainability is a global concern across all sectors with the most talked about being energy, food and water. The change in cultural norms and established practises can be seen as a slow process however:

People who manage to intervene in systems at the level of paradigm hit a leverage point that totally transforms systems. You could say paradigms are harder to change than anything else about a system... But there's nothing physical or expensive or even slow about paradigm change. In a single individual it can happen in a millisecond. All it takes is a click in the mind, a new way of seeing. Of course individuals and societies do resist challenges to their paradigm harder than they resist any other kind of change. (Meadows 1997)

This quote shows that the paradigm change we have experienced in the fashion industry is a result of a decision in peoples minds, that has brought about a new set of practises considered important. Fashion and the consumption of fashion uses mass amounts of scarce resources every year and being a very visible industry with a high media presence it is one industry with a large potential to bring about a shift in consciousness with a positive outlook towards sustainability relatively quickly.

The problem, however, is the industry is very complex, at times covered up and shrouded in mystery which makes it difficult for consumers, who continue to purchase things from large scale retail without actually understanding the process that has happened to make this product and why it is cheaper than alternatives. The main point here is that it is not easy for consumers, the industry needs to make it easy for consumers to make informed decisions just like it is in other industries. This is where Denmark is setting its fashion industry apart, the collaborative nature and integration from industry bodies is an important aspect of making it easy for consumers to opt for sustainable alternatives.

7. Conclusion

Throughout the course of this research the goal has been to analyse the slow fashion industry in Denmark by interviewing four companies to see how what is happening in the country can be explained. The rise of a slow fashion industry in Denmark has been developed by a number of different factors each contributing to the growth. The development of the labels themselves has been a result of a Danish society that has put increased importance on sustainable issues and stems from the developments in other sectors including sustainable energy technology and ecological food production. This research aimed to answer the main question of *How can the emergence of a strong, sustainable “slow fashion” industry in Denmark be explained?* Using the supplementary questions; *How is the synergy among Danish designers / Industry body and government contributing positively to the development of a slow fashion industry? Can the development of slow fashion within Denmark be attributed to Denmark's' history of proactively incorporating sustainable alternatives into mainstream culture? In the fashion sector why is the interaction between brand and consumer important to promote sustainability within the industry? Why has the developments in slow fashion 'style' not contributed to the widespread development of this industry?* to understand what it has been about Denmark that has allowed for this cluster to develop.

Upon conducting this research it was found that the Danish industry has become a world leader in the slow fashion space, not because of the amount of brands in total numbers but because of integration and synergy within the industry that has allowed for the cluster to develop. The main finding of this research being that the Danish model into slow fashion has been a natural development from a progressive nation that has managed to successfully integrate environmentally friendly energy and food into the system and the current synergy that flows through the fashion industry can be accredited to the nations earlier efforts into sustainability. Outside of the environmental benefits, Denmark has achieved this cluster because of the developments in other industries and the increased conversations which have led to Danes familiarity with sustainability in general. The Danish model has a strong support network in place as well, so trying to export this model would require a similar framework and invested interest from all areas in the fashion business. Developing a slow fashion business in a country where there has not been as much emphasis on sustainability in other sectors

could prove difficult if the members of that society are not as familiar with the terminology like the members of Danish society are. It has taken the better part of twenty years to establish this in Denmark, the change is slow and a society should not look to make changes overnight, but using the Danish model as an example would help to speed up the process of integration.

Other findings were that a slow fashion industry is about appreciating the time and construction of garments as well as drawing on the long history of clothing as an important part of society and a social practise. In this sense fashion is culture and to explore the relationships between clothing, consumption and society we can analyse 'why people consume' which is grounds for developing a more sustainable industry in the future. For all the good the Danish industry is doing and the global spotlight into the restructuring of the supply side of clothing there still exists a gap when it comes to consumers and the focus must shift to the demand side. Encouraging consumers to become more engaged has proved difficult as a large proponent of the Danish industry is run by fast fashion and significant change does need to occur in purchasing habits if these businesses are going to change business models.

Consumption and waste of inferior clothing is the issue and the small cluster is the innovators, as indicated by Maloney's model. It is important for them to continue to create high quality garments and promote the value in what they do if the industry is to see substantial change. It must also become easy for the consumer to make the choice in opting for a slow fashion product and see the value in making this choice. The cluster of sustainable businesses will continue to grow and build on the success Denmark has achieved in other sectors. A large part of this is due to the involvement from DAFI and the investment they have put in to setting up framework that is making it easier for companies operating with suitability in mind to come into existence. Also, by looking at existing businesses that want to operate more sustainably larger corporates will start to take notice. The cluster theory does apply in Denmark as more brands become involved the increase in knowledge spillover, specialised labour, information externalities and an increase in reputation becomes apparent (Kuah, 2002). Although a small step the collaboration between The Danish Environmental Protection Agency and IC Group is important as one of the largest clothing companies in the Nordics it has participated in

the Natural Capital Accounting project and opened up to be analysed under the EP&L as developed by the Kering Group (Høst-Madsen, 2014).

There does exist a large challenge associated with being an early adopter and profit is not always initially seen, but having a long term mentality is something of importance to sustainability. Maybe the benefits will not be seen for many years as it has taken significant time for the wind industry to develop in Denmark and has also taken twenty years from the initial efforts of eco labelling, before the significant impact DAFI is having has become apparent. Continued consumption habits cannot continue and with the rise in demand from developing nations, Denmark is already far ahead of nations highlighted by the wind sector which accounts for more than 40% of energy supply and the nation aims to be fossil fuel free by 2050 (Denmark, 2015). The challenges of being an early adopter are there but Denmark is now in a significantly better place long term than those nations still battling for non-renewable fossil fuels. The same concept can be applied to the fashion industry and a key point with Denmark is the successive development of sustainability that has made it an integral part of Danish culture. Although the Danish model does provide a good background for a case study into slow fashion and a cluster does exist with an extensive support network. Whether this model is able to be exported to another nation aiming to establish more sustainability in the fashion sector remains to be seen.

One problem that does exist in Denmark is that current designers who operate in this space are choosing not to talk about sustainability, based on what large corporations have done with the terminology. This, as indicated in the research, is a problem and the complexities of production are just that, complex. Sustainability and operating in a slow manner also meant different things to each of the designers interviewed making it difficult to put a standardised definition in place. Although the use of textiles and production methods varied, the common factor among the designers interviewed was the use of high quality materials and the longevity in products they aim to produce. In terms of addressing sustainability in the industry, this should be at the forefront, the promotion of high quality goods and a framework that requires transparency from businesses so when the consumer enters into the equation the inputs of the garment are available and easy to understand.

The final concept explored in this research was emulation and conspicuous consumption. This topic of Veblen's has played a very significant role in history and clothing has been used as a form of non verbal communication throughout time to portray images of prosperity, class and taste as well as representing certain cultures dress. Clothing is very influential in society and why Veblen's study of emulation was important to understanding why people wear what they wear and what they are aiming to achieve by dressing in a certain way. As established today's fashion landscape is not as straightforward and trends are created from all classes with emulation capability increasing due to the rise of fast fashion and consumer purchasing power. Clothing is important to Denmark as a 'Fashion Nation' and Veblen's theory modified for the Danish context highlighted that people are consuming to be recognised and emulation still exists with the mass amounts of press and online content that is generated during fashion weeks. As clothing is very important to this society, it does hold an important position to be able to influence change should focus shift to the promotion of quality in textiles and longevity in design. Kjetil Aas also addressed how the consumer mentality has shifted and stated "If we were all consuming and treating our clothes as our grandparents did we would actually not have this discussion because it wasn't an issue (Aas, 2016)".

Like all things within the industry it has changed over time and what is new and somewhat still limited is the research, or in depth analysis of slow fashion and the question of how can change be sustained when the current mentality is that consumption equates to well being. Denmark is an early adopter with existing framework and an established cluster that has the ability to entice a change in how the fashion industry operates. However there still exist challenges and finding a way to both make slow fashion easily accessible and appealing to consumers while also aiming to educate them that current consumption patterns are out of control is the next challenge. People will continue to consume but the amount of consumption is something that needs to be addressed especially as the rise in economic purchasing power from those in developing nations continues to grow. To minimise future impacts of the industry we should look to the Danish model as an example of how to integrate sustainability into one of the most polluting industries in the world.

8. Reflection on research

8.1. Further research

There seems to be common understanding with those operating in the fashion industry (outside of fast fashion) that the industry is spiraling out of control and the sale of product has become more important than the creation of the good. What is lacking and something that would be more suited to the field of marketing would be extensive research into consumer purchasing habits. In the current capitalistic society studies into consumer behaviour have mostly focused on analysing consumer behaviour in order to increase sales. Future research can aim to address this issue as a system problem which would go into analysis of capitalism and whether this is a suitable model for longevity which is far beyond the scope of this research and would cover all industries, not just the clothing and textile business.

Secondly consumption does not equate to happiness and a mental shift in what is considered the good life could unlock keys in to consumer culture. Further research that will be beneficial would be to conduct consumer based surveys into consumption habits. Qualitative research has been done previously, but analysis into satisfaction of purchase and consumers thoughts on why they purchase cheap, inferior products that are on trend without investing time into creating personal style can delve more deeply into consumer habits and what it is that makes them shop while exploring human well-being. The sense of euphoria associated with the purchase is what keeps consumers coming back and analysing actual happiness vs perceived happiness could provide insight for slow fashion labels as they look to change consumer opinions about the benefits of living a slower lifestyle. As established consumers have responded negatively to finger pointing so in the way mass market companies have successfully implemented consumptionism into fashion, the slow fashion industry and institutes must look to ways in which they can change consumers habits of consumption by focusing on the positives associated with their model rather than attacking the other model.

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Appendix A

Interview template for: *A case study analysis on the rise of 'Slow Fashion' within the Danish Fashion Industry*

Background information of company

- Currently what is the ethos of the company and who do you aim to design clothing for?
- Tell me a bit about the creative process that goes into creating a collection?
- How many collections do you design a year?
- When establishing your business was sustainability always on the table or is this something that has evolved over time?

Thoughts on the current state of the fashion industry

- Throughout your tenure in fashion how would you say your attitude towards fast fashion has changed?
- What changes in the Danish society in general do you believe have influenced your views on fashion?
- Research has shown that consumers are buying a lot more than a decade ago and trends are created and destroyed at an alarming rate, what do you think is the cause of this?
- Large fast-fashion retailers famously introduce new products into stores almost weekly and recently there has been a number of high profile designers leaving large fashion houses, stating creative freedom and time constraints to produce collections among reasons. Do you buy in to the talk that creatives are fed up with the pace and feel we are at a tipping point towards change within the industry ?
- Clothing was once a high value commodity, do you think this is still the case or how do you feel this perception has changed when speaking with customers /industry professionals in todays market?

- To what extent would you say social media and blogging has impacted the fashion industry? Can you highlight a positive and negative example?
- What role do you believe fashion week plays in furthering consumers (end and B2B) knowledge of sustainability in textiles?

Sustainability in fashion

- Sustainability or slow fashion means many things to different people/ businesses what are the key aspects you aim to integrate into your business?
- What Key Performance Indicators do you put on the garment creation phase to help achieve your companies view of sustainability?
- At one point in time it was said that you could either have sustainable or fashionable clothing, but not both. Do you think this mentality has changed? Why/ Why not?
- In a society full of advertising what has been your experience in dealing with green phobia or green fatigue?
- What has your experience been like when aiming to source sustainable and/or organic textiles?
- One of the concerns is potential strategies to address sustainable business are largely theoretical, however the use of green accounting and EP&L has slowly entered business discussions. Do you think the monetising of environmental damage will have a positive impact on getting big business to change?
- Do you feel it is your duty as a fashion business to raise awareness in sustainability in fashion? Or is this something that should be driven from an institutional level?

Consumer Engagement

- What do you think the role of brands is in influencing the consumer to become more engaged in sustainable issues in fashion?

- There is a lot of information and misinformation floating in the public domain about fashion and its impact of the environment which creates a lot of ‘noise’. How are you aiming to overcome these issues to achieve consumer buy in?
- Do you think there is a competitive advantage marketing sustainable design and is this something that is drawn on when approaching buyers and end consumers?
- Why is sustainability in fashion something people should care about from your perspective? Why did you get involved?
- Research has shown that consumers do want to be sustainable and have a conscious about environmental issues, however this does not translate into shopping habits and patterns. Which ideas have you experienced that have succeeded in engaging consumers in the sustainability conversation and which haven’t? Why do you think this is?
- What impact do you think celebrity endorsement such as Pharrell and G-Star’s Raw for the Oceans campaign has had on peoples perception of sustainable fashion? And have you experienced something similar in Denmark?
- What role does social media play in your business (promotion of product / education)
- What feedback have you received from consumers (both end and B2B) about the incorporation of sustainability into your company?

Difficulties of aiming to be sustainable in a highly competitive industry

- Slow fashion brings its own challenges, what have you experienced that you believe to be specific to being a slow or sustainable label?
- How are you overcoming these challenges?
- What mistakes have you witnessed in other labels that you have learnt from?
- Where do you see slow fashion having an advantage?
- Where are the disadvantages ?

- What challenges have you faced when communicating to consumers surrounding a higher price point of slow fashion, especially when establishing a new brand?
- It is a business and does need to make money, how do you balance your vision and values with the profit driven side of the business?
- What is the importance of establishing long term relationships with retailers and manufactures for a sustainable future in fashion?

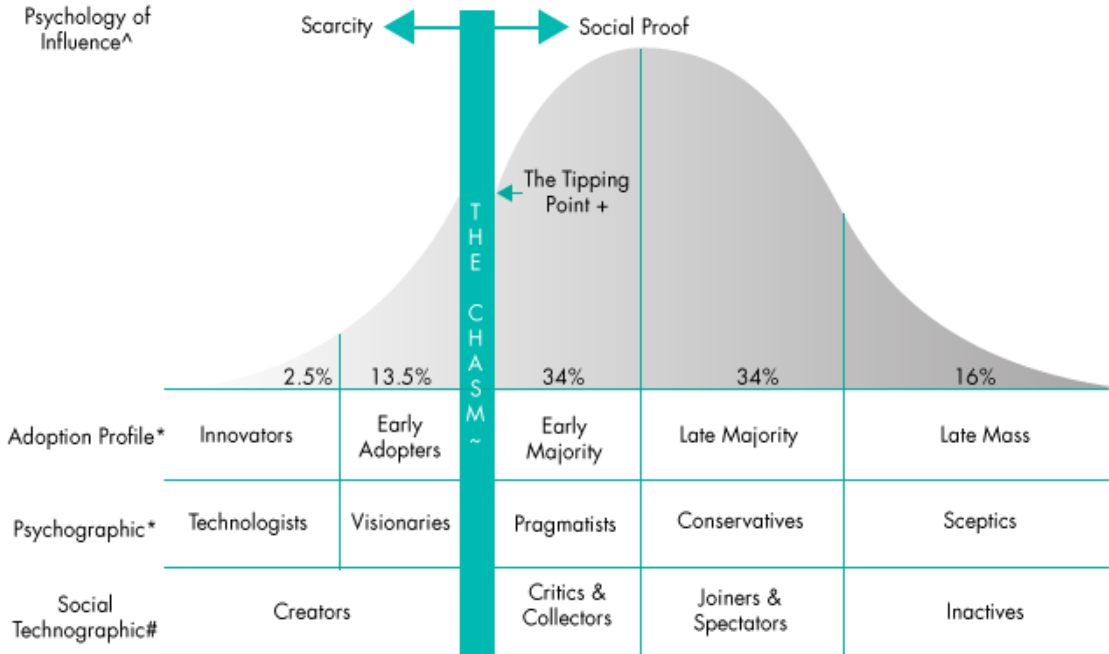
The Danish Industry

- Denmark has a long history of design excellence and trade, how has being present in this environment affected/influenced you as a designer/ business owner?
- The fashion industry is constantly changing, what has your experience been with the Danish Industry and DAFI's responsiveness and ability to adapt to change?
- What changes in the Danish society do you believe have influenced or allowed for fashion labels with a slow ethos to come into existence?
- From your perspective how influential has DAFI been in establishing Danish design on the International market?
- Furthermore, has the institution been influential in promoting good ethics and slow fashion with local fashion businesses?
- What has your experience been with the support system in Denmark for a fashion business with a slow approach?
- In terms of analysing your peers (Others operating with sustainability at the core of the company) do you believe there is an increasing synergy among fashion brands to deliver sustainable products? Or is the market still driven by fast fashion?
- Do you feel there is a difference between what is happening in Denmark with regard to slow fashion compared to other areas of the world? Why / Why not?

Appendix B

ACCELERATING DIFFUSION OF INNOVATION: MALONEY'S 16% RULE

Maloney's 16% Rule: Once you have reached 16% adoption of any innovation, you must change your messaging and media strategy from one based on scarcity, to one based on social proof, in order to accelerate through the chasm to the tipping point.



[^]Robert Cialdini ^{*}Everett Rogers [#]Forresters [~]Geoffrey Moore ⁺Malcolm Gladwell