**Pass the Scissors: consumers close in on the fashion industry**

**Keywords:** fashionsupply chain, fashion theories, consumers, co-creation, crowds, digital technology, democratization

**INTRODUCTION**

**“**The fashion industry is often the first to recognize trends. And it may have been among the first to forecast their end.” (The end of trends, 2011)

At no other time in the history of the fashion industry has such a premonition resounded so loudly. Fashion designers once regarded as the custodians of ‘design’ and supply chain logistics are now grappling with the concepts of co-creation, crowd sourcing, non-design educated entrepreneurs, crowd funding and the democratization of supply chains, marketing and sales.

Where once the ‘designer’ was considered the initiator of fashion innovation and trends, new digital technology has opened up the marketplace to the global consumer/customer, who now determines fashion trends and wants a slice of the action. Tools for determining such enterprises are now available to the global community and many new ‘indiepreneurs’ are embracing the process to create small businesses that are creating tensions for designers, their supply chains and their businesses. Consumers are heating up the fashion system at every stage and creating a ‘Boil Over’ model that will have far reaching repercussions.

**LITERATURE REVIEW**

**The Fashion (Trend) Theories**

Three traditional theories of fashion have maintained centre stage for many years in the analysis of the fashion system. For hundreds of years these theories covered the process of introducing fashion to the masses.

The Trickle Down Theory (Veblen, 1899 and Simmel, 1904) “implies once adopted by the upper class, fashions are imitated by each succeeding lower class until they have ‘trickled down’ to the lower class.” (Sproles, 1981, 116) This hierarchical model suggests fashion is a slow, ‘trickle’ process with those able to afford the designer fashion of the day setting the trends for the masses ‘below’.

The Bubble Up Theory recognizes the advent of ‘streetstyle’ where the reverse is created. Polhemus (1994) defines this as “.......genuine streetstyle innovation. This may be featured in a pop music video and streetkids in other cities and countries may pick up on the style. Then, finally – at the end rather than the beginning of the chain – a ritzy version of the original idea makes an appearance as part of a top designer’s collection. Instead of trickle-down, bubble up. Instead of the bottom end of the market emulating the top end, precisely the reverse.” (Polhemus, 1994,10)

While this theory maintained momentum through the 1980s and 1990s, the technological revolution introduced new tensions into the marketplace where information became readily and simultaneously available to *all* consumers. “The Mass Market Theory proposes that mass production combined with mass communications make new styles and information about new styles available simultaneously to all socio-economic classes. Therefore fashion diffusion has the opportunity to start at essentially the same time within each class. Given this orientation the mass market theory is sometimes referred to as the horizontal flow or Trickle Across Theory.” (Sproles, 1981, 116)

Therefore there has been recognition that access to immediate fashion trend information has been changing the time lapse between fashion hitting the stores, mass acceptance of these trends and the ‘fast fashion’ tensions it has added to the supply chain.

However at the end of the first decade of the 21st century there are now more immediate and worrying trends for fashion designers. Simon Doonan, Creative Director at Barney’s upscale department stores wrote in *The New York Observer* Spring of 2010 that he was not seeing any trends in human wear anymore, “In the old days, style used to be the prerogatives of a small group of people. Now it is a national sport. Ticket sales are exploding. People are pouring into the arena in such vast numbers that none of us can keep track of the rule book. Et voila! Nobody is keeping score. All bets are off. Anything goes.” (The end of trends, 2011)

What Doonan noted is that there are no longer only a few at the top of the pecking order influencing trends, “Cable television and the Internet have splintered the mass audience that trend establishers and marketers once lorded over.” (The end of trends, 2011)

Trends can arise anywhere and at any time, and the advent of street style blogs has promoted that. “There are more sources of inspiration,” Rodic (Face Hunter blogger) said. “Before it was the fashion designers who were inspired by the street and the street was inspired by fashion designers. Now it’s real people inspiring real people.” (Corcoran, et al. 2006). Drummond supports this by going one step further and acknowledging customers as now having the power to set the trends, “.....giving power to the online fashionistas of the world has seemed to transcend to setting the actual trends themselves. Those operating in the online fashion space have learnt and grown after having so much exposure to available material and footage and they are now the ones setting the trends, not the big head honchos in the fashion forecasting houses. Brands are now approaching their user base to predict upcoming trends.” (Drummond, 2010)

One such label is Burberry where the Art of the Trench website invites customers to upload photos of themselves in their favourite Burberry outfit. Participants vote and make comments on the garments and Head Designer Christopher Bailey also takes note. “If someone has gone to the effort of taking a picture of themselves and uploading it, then the least I can do is look at it and engage with it. I get inspired now by the Art of the Trench for collections. It’s a weird reversal that customers and people – the Burberry community – are inspiring future collections.” (Meagher, 2011, 32)

So the fashion community is creating opportunities for designers and customers to engage in trend sourcing while impacting the designs and manufacture of fashion garments.

**‘Design Democratizing’ Technology**

In recent years digital technology has incrementally increased conversations and knowledge between designers and customers.

“Once a bastion of ‘professionalism’, credentialed knowledge producers share the stage with ‘amateur’ creators who are disrupting every activity they touch. Tens of millions of people share their news, information and views in the blogosphere, a self-organised network of over 50 million personal commentary sites that are updated every second of the day.......all one needs is a computer, a network connection, and a bright spark of initiative and creativity to join in the economy.” (Tapscott, & Williams, 2008, 11)

Initially this information was used for marketing and selling purposes, with businesses still able to direct and focus the information for their own purposes. Recently however, the increase in technological innovation has opened up new tensions. “The proliferation of the internet and its communities based around niche tastes has already provided a route to market for the individual. But new access to the tools of production takes creativity to a new level – to that of complex design on a large scale. Consumers with a brilliant idea or an original style have typically been stumped by the lack of means to realise it........But that is set to change.” (*Viewpoint #27*, 2011, 33)

In fact, many companies have seen the writing on the wall and are realizing this consumer creativity can be, and needs to be, harnessed for their own survival. “.....instead of just listening to the customer, in many cases customers are performing this design (configuration) activity by themselves on a tool supplied by the manufacturer. The selling process turns into a co-design process.” (Berger, & Piller, 2003, 43)

Some authors have now seen this technology pushed further with consumers now wanting to create their own designs and manufacture them in small quantities for profit.

“Where Do It Yourself once meant tacking up sloping shelves and periodically flooding the kitchen before finally calling a plumber, the new DIY – more Design It Yourself – is returning the initiative to the consumer. A combination of technology, the internet, excess manufacturing capacity and, it should be stressed, a certain draining of enthusiasm for shopping in these straitened, unsustainable times, is causing individuals to seize the opportunity to make their own products from scratch.” (*Viewpoint #27*, 2011, 33)

Designers and the legal fraternity should also be worried as DIY consumers are now extremely *inclusive* of others sharing their designs and therefore their intellectual property. “...the idea of sharing the creative integrity of a product, once jealously guarded, is spreading.....this feels like the end of intellectual property...Although many varieties exist, the standard open-source license allows intellectual property to be used and even altered, as long as the original author is credited and the altered work is released under the same terms. The creator voluntarily surrenders certain legal rights (copyleft is a popular term for this) to achieve another goal.” (*Viewpoint #27,* 2011, 103)

**The Consumer**

The consumer has at no other time had so many options for participation and interactivity in the global fashion marketplace. Access to, and readiness to participate in, all things fashion and technological has fostered a new breed of consumer, “....more demanding, time driven, information intensive, and highly individualistic.” (Sheth & Sisodia, 1997 in Wu, 2010, 85). Greene (2011, 3) goes on to say, “Never before has the consumer had so much control over what, how, and when products are available.”

“Fashion on demand is here, from sped-up deliveries at Burberry to businesses in which the consumer acts as buyer, backer and even the designer, and can get the products to her door within weeks if not days. Driven by the internet, new forms of retail combine urgency with mobile commerce, social media, gaming and crowdsourcing.” (Corcoran, 2010)

This new interactivity and power has created a consumer who is knowledgeable, confident, time focussed, sharing and happy to test their fashion creativity in the open marketplace.

“Recently, consumer researchers have struggled to devise new terms for the creative, active, participatory community member they saw involving themselves with the materials and practices of commercial culture. The term consumer seems hopelessly outdated and weighted with a baggage of passivity and isolation that is increasingly untenable. Some have sought to revive the old term of ‘prosumer’ (Kozinets, 2007) others have coined new terms such as ‘multipliers’ (McCracken, 2005) As Henry Jenkins (2007) asserts, the creative worlds of the fan-like consumer are ‘everywhere and all the time, a central part of the everyday lives of consumers operating in a networked society’.” (Kozinets, et al., 2008, 339)

It is no secret consumers have escalated the ‘fast fashion’ chain and have demanded access to fashion *immediately* it hits the catwalks. But as this has become more available, there is a growing need to engage consumers further in the process, not only the access. “As consumer demands escalate, the need to create fully personalised experiences that encourage the consumer to engage with products from their creation is becoming paramount.......Members of the ‘creative capital’ generation have, over the past decade, led a surge in the desire or sense of personal right to explore one’s creative potential.....Consumers are displaying an increasing preference for a less-is-more consumption model, with ‘less must be totally right for *me*’ as the crucial new rider.” (*Viewpoint #27*, 2011, 37)

Many established fashion companies are buying into this ‘creative’ consumer and are devising strategies where consumers are directly involved in several stages of the supply chain.

“The phenomonen of corporations creating goods, services and experiences in close cooperation with experienced creative consumers, tapping into their intellectual capital, and in exchange giving them a direct say in (and rewarding them for) what actually gets produced, manufactured, developed, designed, serviced, or processed....It’s NOT plain feedback without an answer, it’s not Do It Yourself, it’s not customisation, it’s not even personalisation, as all of these actions take place *after* companies have decided what the basics are, which products and services and experiences they’re willing to hand over to consumers.” (Customer-Made, 2010)

Many companies are now establishing strategies such as crowd sourcing; using the collective brain to initiate concepts, designs and innovative ideas and with crowd funding actually invest and back specific label*s*. “There was always someone or some company in charge, controlling things at the ‘top’ of the food chain. While hierarchies are not vanishing, profound changes in the nature of technology, demographics, and the global economy are giving rise to powerful new models of production based on community, collaboration, and self-organisation rather than on hierarchy and control......Customers become ‘prosumers’ by co-creating goods and services rather than simply consuming the end product. So called supply chains work more effectively when the risk, reward, and capability to complete major projects.......are distributed across planetary networks of partners who work as peers.” (Tapscott & Williams, 2008,1)

To many this may seem like a cheap way to harness the collective ideas of many people. However, the new consumer is not concerned. They believe they have something to say. They are seeking a say in the fashion system and believe they have the creativity (crowd sourcing) and monetary power (crowd funding) that is required. Customers are interested in co-creating for the following reasons:

* Status: people love to be seen, love to show off their creative skills and thinking
* Bespoke lifestyle: should guarantee goods, services and experiences tailored to needs
* Cold hard cash: getting a reward or profit cut for helping a company develop the Next Big Thing
* Employment : customer-made is a great vehicle for creating and finding employment
* Fun and involvement: pleasure and satisfaction if creating with brands one loves

(Customer-Made, 2010)

While co-creating is a strategy that can be managed by the companies and used to enhance their profits, there is a growing trend for consumers wanting more ownership. “The growing power of the consumer is stirring the potential of a tug-of-war with the brands themselves as shoppers demand exactly what they want and how they want it and they want it right away. The balance of power between retailers, shoppers and brands began to shift long ago, but now consumers are no longer content to steer the fashion vehicle they want to own it.” (Corcoran, 2010)

This trend has created a new breed of fashion entrepreneur; an entrepreneur rather than a ‘designer’, but a new look entrepreneur who also believes they have the creativity and design ability to create a label from inception. From this has spawned several new categories of entrepreneur. “The Indiepreneur.......blend the possibilities of DIY with the ease of the web and social media to launch their own creative businesses, products and brands, or to facilitate this for others........[they] are as much motivated by profit as driven by a quest for originality and innovation.” (*Viewpoint #27*, 2011, 57)

Trendwatching.com (Minipreneurs,2011) describes this new generation as “offering something that’s different, that’s special, that’s vintage, that’s quirky, that’s customized if not beyond personalized, that’s fringe, or that’s just not profitable enough to be developed by big corporations instead of well meaning enthusiasts.” And these consumers, turned entrepreneurs, are offering a plethora of fashion product that is niche, hyper individualized, affordable, and is disrupting the traditional fashion offerings.

**The Fashion Cycle and Supply Chain**

While fashion is a broad term that encompasses any product or market where there is an element of style likely to be short-lived (Christopher, et al., 2004) there are also other criteria such as short life-cycles, high volatility, low predictability and high impulse purchasing (Christopher, et al., 2004) that this new entrepreneur has to address.

The traditional fashion cycle encompassed specific stages from trend forecasting, design, manufacturing through to sales planned and created many months ahead of their final selling time. As recently as 2005, Jones presented a fashion cycle model (Figure 1) that described the intricacies of the fashion supply chain and the myriad processes required to create a final fashion product.

**Figure 1**

As seen, this has been a long, complex and laborious process which has been at odds with the immediacy of trends/information, and availability of product that the new fashion consumer demands. “Fashion buying is traditionally driven by a fixed calendar of trade fairs, fashion shows, fabric events etc., organised around a two season approach to product ranges, with planning for product ranges based on previous sales data, starting as long as one year in advance of the selling season (Birtwistle et al., 2003). The changing demands of fashion consumers, the need for quick reaction to emerging trends and the move away from planned forecasts has resulted in a shift in the apparel buying cycle. It seems that retail is moving away from planned seasonal product creating smaller collections more frequently.” (Barnes et al., 2006, 259) For many companies the number of planned seasons has significantly increased in response to consumer demand for newness, resulting in as many as 20 ‘seasons’ per year. (Christopher et al., 2004, 372)

In recent years supply chain management theorists have attempted to rectify responsiveness through ‘just in time’ (Bruce et al., 2004), agile chains (Christopher et al., 2004, Bruce et al., 2004) and quick response systems (Fernie & Azuma, 2004). These models have seen a shift in partnering and networks, shorter production runs and elimination of stages in the supply chain, with all models understanding that proximity to the end market having distinct advantages. (Barnes, et al., 2006)

These trends have fostered the ‘fast fashion’ phenomenon, where high street stores have minimised, and in some cases deleted, some sections of the traditional supply chain by implementing various permutations of the above models. This more agile model has reduced steps in the traditional cycle and in some cases deleted whole steps by going *direct* to customers. (**Figure 2**. below)



The main reason for existing companies to embrace this shortening of the supply chain has been cost minimisation. However,

“There is also an increasing fashion influence; no single style or fashion has dominated for any length of time. For many consumer sectors demand is approaching the chaotic in its insatiable appetite for diverse services and goods. Mass customization and individualized products with shorter season lengths; micro merchandising and markets segmented at the individual level; large numbers of products chasing a diminishing market share; are all evidence of the inexorable movement toward a ‘sea change’......an organization seeks to provide a highly diverse range of products and services to a customer in the exact quantity, variety and quality, and at the right time, place and price as dictated by real-time customer/consumer demand.” (Christopher, et al., 2004, 372)

Many companies are embracing new models where consumers are driving certain stages of the supply chain. “The idea that we have this one method of bringing products to market based on secrecy and privacy, protection and patent law is archaic.....Openness allows for low-risk, low cost, distributed production, with communities of admirers and potential customers offering free market research every step of the way.” (*Viewpoint #27*, 2011, 105)

Anderson-Connell et al. (2002) identify four pathways for existing companies to embrace this new consumer driven model:

1. Clothes clones – copying a customer’s favourite clothing item and partially modifying on customer’s request
2. Totally custom – involves the customers in designing the garment, fabric, colors and offering customized fit
3. Co-design – integrates a professional associate’s contribution (eg. A company’s pre-designed modules) with the individual customer’s design
4. Design options with standard sizes – provides a menu of design components for individual customer’s selection to create a customized garment. (Wu, 2010, 88)

Other businesses have seen the worthiness of including consumers much earlier in the process and have embraced crowd sourcing through every stage of the supply chain. “Crowdsourcing is the concept that entails outsourcing solutions to business problems or tasks from the minds of customers instead of seeking solutions internally from employees or contractors.....to go a step even further from mere crowdsourcing of ideas, giving power to the online fashionistas of the world has seemed to transcend to setting the actual trends themselves.....cutting the spend on forecasting errors.” (Drummond, 2006, Howe, 2006)

Crowd funding has also opened up the once complex and difficult route to gaining backing for small and emerging designers/minipreneurs. “Essentially crowd funding is the new method of financing. Instead of the traditional route of getting one or two major investors to front the money for a project, the funding is raised by a large number of supporters, each giving smaller increments.” (Crowd Funding, 2010) Consumers are now backing the collections they would buy and are driving the process to see these collections produced. It also allows this new group of creative indiepreneurs the opportunity to gain backing for small, niche collections that may formerly not have been produced. “Because of their small scale, such brands are also faster and better placed to respond to trends and customer feedback. Consumers will use indiepreneur facilitators to make products for which they may be the sole buyers; as Gershenfeld puts it, ‘products for a market of one person’.” (*Viewpoint #27*, 2011, 57)

And how are these niche collections being produced? By a manufacturing system now producing much smaller runs for established larger designers; up to 20 times a year. “Arguably, a ‘making’ renaissance has been building for a decade or more. However, its new expression comes backed by enabling businesses, design-democratizing technology and a factory system ready to support small orders......demand is such that the hobbyists driving traffic are increasingly making new careers out of it....” (*Viewpoint #27*, 2011, 35)

There are also websites where “...microentrepreneurs can source suppliers, manufacturers, exporters and importers and find out how much it would cost to have their product made......this C2B (consumer to business) manufacturing is, in part, a result of the rise of shanzhai (mountain bandit/knockoff) businesses in China.” (*Viewpoint #27*, 2011, 57)

And has this new consumer affected the marketing stage of the supply chain? “Companies once confident they knew their customer and had ‘negotiated meaning of the brand’ (McCabe & Malefyt, 2010) are now struggling with new tensions inherent in their consumer and the rise of digital and social media and the internet.......With the advent of new technology and the power consumers have to manipulate or ‘interfere’ with the message, Christobulides (2009) believes brands must now become ‘facilitators’ of the message and drive marketing strategies that embrace this new model.” (McMahon & Morley, 2010, 71)

For those businesses inclusive of the new prosumer, then many already have a committed market, one that has been involved in the process since its inception and has an investment in seeing the product sold. “It lets consumers come up with their own ideas and product designs as well as ways to make them happen and bring the product to life in the marketplace. It involves the consumer much earlier in the innovation and marketing process and keeps them involved for much longer. This has injected fresh and different ways of thinking and has been incredibly disruptive, producing ideas that they and their [marketing] agencies had not considered.” (Needham, 2008, 61)

Wu goes further and states “These dot-coms share one common characteristic: they engage and energise their customers in co-creating their products and building dynamic online co-design communities. Under this new business model, consumers take on multiple roles. They become the co-designer, marketer, and seller, whose creativity, devotion, and interactions drive the future direction of the business.” (Wu, 2010, 100)

It appears the fashion supply chain has undergone, and is still undergoing, enormous change: from including the customer/consumer in various parts of the process; shortening and sometimes deleting some stages of the chain; increasing the ‘seasonal’ calendar, while decreasing quantities made, and shortening lead times; eliminating company trend forecasters, designers and wholesalers; and indiepreneurs increasing the variety and uniqueness of available product.

**RESEARCH METHODOLOGY**

This paper was guided by the researcher’s experience in the industry and focused on research methods such as triangulation and bricoloage where “Completeness is important to qualitative inquirers, as it allows for recognition of multiple realities. Inquirers are thus not using triangulation as a means of confirming existing data, but as a means of enlarging the landscape of their inquiry, offering a deeper and more comprehensive picture.” (Tobin & Begley, 2004, 393)

It was also imperative the findings for this paper were up to date with the fast paced fashion industry and rapidly evolving digital revolution. Internet –mediated research (IMR) (Hewson, Yule, Laurent, & Vogel, 2003) “….characterized as the gathering of novel, original data (via the internet) with the aim of subjecting them to analysis to provide new evidence in relation to a specific research question” (Hewson, C., 2008, 543) was a primary research tool. This research also took a qualitative approach using recent academic literature, newspaper articles, conference presentations, company websites and media interviews. A literature review was conducted that, along with the researcher’s experience in the industry, guided analysis of these media and online sources to assess current industry practices. The purpose of this qualitative study is not to provide a statistically valid conclusion, but to offer a launch pad for discussion of new and dynamic models for the fashion industry.

**FINDINGS AND DISCUSSION**

**Connecting the Consumer to the Supply Chain**

So how is it working? Many companies are addressing these changes in varying ways. While some are embracing new strategies, there are others still struggling to find where and how they fit into the new model. The following identifies several of these combinations for existing and new fashion enterprises.

**Co-design and co-creation**

Large companies such as Ralph Lauren offer derivations of the above with a ‘Make Your Own’ tee shirt; design options with standard sizes. Consumers are able to upload their favourite colours, logos and styles to create individual looks and then share these personalised products with their friends through social media. Converse also offers co-design options; “Start an Original’, but Keds shoes goes one step further and after individuals have personalized their designs are able to offer these for sale to others C2C (consumer to consumer).

Burberry has taken co-creation and co-design to a whole new level with the ‘Design Your Own Trench Coat’ with Burberry Bespoke, where over 12 million options are available for consumers to direct design. “Burberry is a brand. It’s very important that the brand remains having a strong point of view and having an opinion,” said Bailey. “I think it needs to be created here. Certainly I think you need to engage with a customer but the engagement is about inspiring that customer and making them feel a part of that brand. I don’t necessarily think it’s about designing for that brand.” (Corcoran, 2010)

While several companies have offered this strategy for some time, the trend is for consumers who are younger and younger to also be offered these choices. Sites such as Established Today are targeting teens in co-design options. “Our simple design tool on the Established Today website makes it easy for you to design your own clothes right now.....All it takes is your style and our website design tools to make your own totally unique, totally rad fashion statement.....Design online, and purchase right there on the spot. Within days you’ll get your design in the mail to show off your design skills...” (Est Today, 2011) KidZui is offering six year olds (with parent supervision) the chance to design and produce clothing.

**Crowd Sourcing**

StyleHop.com is one company selling the ability to predict consumer demand accurately. By crowd sourcing for trends, they believe they can take much of the guesswork out of which styles to produce and what quantities. “The greatest resource for improving style-level fashion forecasting is the collective wisdom of consumers.......the consumer is the best source to determine which design prototypes will actually sell next season (and which won’t).” (stylehop.com, 2011)

Threadless was one of the first sites to harness the power of the crowd, by sourcing designs for tee shirts. Templates are provided and individuals upload their graphics. Over a period of seven days the Threadless community votes on the designs they like best. Those ideas selected are put into production and each designer receives US $2 000 in cash, a $500 Threadless gift voucher and $500 each time the design is reprinted. Polyvore also offers its customers the tools to create their own trend-driven magazine layout. Not only do consumers have their projects uploaded onto the site, but fashion companies now use the information to drive their own collections.

Several designers/brands also crowd source feedback on their designs. Rebecca Minkoff turned to Polyvore to help her design her ‘morning after clutch’. She supplied signature materials such as leather, hooks, zippers and asked consumers to add a design. From 4 000 users she ended up with 6 000 designs in one week. “Having my customers be a part of this collaboration has truly shown that they understand my aesthetic and design theory.... I would definitely consider participating in similar projects in the future.” (How social shopping is changing fashion production, 2011)

Derek Lam has participated in crowd sourcing and selling an exclusive limited edition collection on e Bay (2011). From an offering of 12 outfits, he was able to select the six most popular and then offer them for sale. “At no point [during my collection with e Bay] was my vision compromised – that’s why crowd sourcing in this way was such a great concept. I was able to maintain my creative vision and still execute the design process as I normally do.” (How social shopping is changing fashion production, 2011)

In an Australian first, Nina Maya used the consumer to vote for her final collection for her Spring/Summer 2011 collection. “The whole point is to deal with my consumers and make the most of that relationship,” Nina says. ‘It’s about asking them what they want and allowing them to sit in the buying seat and edit the pieces they want. It makes sense to give the power back to them, because ultimately they are the ones purchasing the product.” (ninmayamode.com) She goes on to say “The wonderful thing about crowdsourcing is that you get the customer feedback before you enter into production, so you feel very confident going into that because you already know what’s most popular as opposed to guessing, “ she says.” (Safe, 2011)

Individual consumers are crowd sourcing their own looks, as well as their ultra-niche collections. Sites such as Fashism.com allow individuals to upload images of their outfits to gain feedback and various established designers are known to check this site for inspiration and trend direction.

On a more professional level, sites such as Indie Fashion Marketplace, offer each season, the top selling individual designer a chance to win their own runway show in London Fashion Week, with all expenses paid.

**Supply Chain Options**

So how can small indiepreneurs access the once ‘mass production’ supply chain?

Spoonflower is one company offering small runs of custom print fabric. Consumers upload their designs, purchase their fabric and within ten business days, personalised fabric is shipped to the purchaser. Sites such as Naked and Angry take this one step further by allowing consumers to upload prints on to existing product such as bags, stationery and homewares, with several being manufactured for sale on the site.

And with sites such as Alibaba.com, individuals have access to small run production by sourcing factories happy to cost and supply niche runs of product.

**Crowd Funding**

Crowd funding has also supported new micro-businesses. Kickstarter and Catwalk Genius are two of the first sites which allow individuals (and existing businesses) to upload their latest collections with a budget for what is needed to produce the range. Consumers are then able to back the collection with small increments of money. If the budget is raised, the collection can be put into production and sold online. Various incentives are offered to backers.

Sales and marketing are also under fire. Many companies have gone direct to their customer by offering online sales, deleting wholesale and decreasing ‘bricks and mortar’ outlets. Marketing has become a social media and digital revolution. Individual entrepreneurs are also manipulating these stages by creating direct sales through C2C sites such as etsy.com and using social media such as facebook for sales and marketing purposes. Supermarket Sarah was one of the first small entrepreneurs to realize the power of this phenomonen and now offers product with daily updates through her online site. Salzman (Customer-Made, 2010) believes this will go further and “We’ll all be commercializing our wardrobes and shopping from friends.”

Therefore, there are various companies collaborating with this new consumer. Many are still in the process of experimentation and are assessing the impact of their innovations. However, there are also various ‘individual’ consumers who are partaking of these strategies and demanding their own slice of the action.

**CONCLUSION**

The new consumer has created an array of strategies that is changing the fashion industry. This new ‘consumer-created’, co-designed, DIY, indiepreneur, customer-made and crowd sourced/funded model is:

* Eliminating company trend forecasters, designers, wholesalers
* Increasing the number of planned seasonal mini collections
* Decreasing the quantities for manufacture
* Decreasing the risk of fashion obsolescence
* Decreasing the complexity of distribution
* Increasing the variety/uniqueness of available product
* Encouraging brands to be the ‘facilitators’ of marketing

In conclusion, this paper proposes a new ‘Boil Over’ Theory and Supply Chain Model.

**‘Boil Over’ Theory and Supply Chain Model**

Individuals are now driving the fashion industry – from setting trends, through to creating, producing, selling and marketing fashion. No longer is the supply chain about the mass, but about the ME!

Consumers can turn up the heat at any time \_ and at any point \_ in the fashion supply chain. They are raising the temperature at each and every stage of the chain, decreasing or eliminating the processes involved. Fashion is no longer only driven by ‘classes’, street ‘tribes’, popular culture, mass communication or large corporate monoliths. The individual is lighting fires and creating steam that will have boil over effects for the existing fashion industry. To neglect this trend will put current designers and the industry at risk. There is no trickle; it’s fast and it’s at boiling point!

The supply chain has been turned on its head. Traditional seasons, timing and stages in the supply chain are no longer common and the length and speed of its delivery has fast forwarded. From the above discussion it is proposed that there is a new, smaller supply chain developing. From the ten stages previously described (**Figure 3** below),



it is proposed that there are now only five main stages in this new consumer driven model .

**Figure 4: Proposed ‘Boil Over’ Fashion Supply Chain**

The proposed model addresses these tensions and suggests that existing fashion businesses must take note. Collaboration with the consumer is now a necessity, and is restructuring all areas of the fashion system. Those ignoring this may find that the very people they are trying to sell to may just become their new competitors.

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