



FUTURE  
OF FASHION

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STRATEGIC  
CONSIDERATIONS  
FOR GROWTH

BRITISH  
FASHION  
COUNCIL

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**FUTURE OF FASHION –  
STRATEGIC CONSIDERATIONS FOR GROWTH  
LAUNCHED AT**

**LONDON  
FASHION  
WEEK**

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Foreword

There is so much to be proud of in British fashion. London is a world centre of creativity and design talent. British designers capture the mood of the moment, cascading it into the high street, creating a multi billion pound industry.

In 2009 UK fashion contributes £20.9bn or 1.7% of total UK GDP — twice as much as publishing or car manufacturing — and supported around 816,000 jobs. This economic activity generated over £13bn directly in taxation to government resources. If the wider indirect effects are taken into account, the Exchequer gained £17.5bn each from the British fashion sector.

The challenge is to build on our success so far to achieve even more.

The immediate priority for the retail sector is to increase sales to visitors from emerging markets, particularly the BRIC economies; to invest in international rollout of our strongest fashion retail brands and to maximise the on-line opportunity.

We also need to ensure new talent is not only showcased, but supported in its transition to business sustainability. As chapters three and four of this report show, we are getting better at helping good ideas translate into commercial success. However we need to do more to ensure that the whole industry can improve its resilience in a highly competitive environment and take advantage of opportunities available.

Similarly, there is now — perhaps for the first time in a generation — renewed interest in the potential to manufacture high-quality specialist products in the UK. We should grab this opportunity and build on it, to strengthen our businesses from top to bottom.

The key to all of this is to professionalise and offer better career paths throughout the industry, not just in design talent. This means understanding how the national apprenticeship scheme can be used to build specific skills at all levels of a fashion business. It also means creating links with business schools and creating specific programmes to develop business leaders to work alongside our leading design talent, as well as making London the best place to incubate a new business from initial excitement to commercial sustainability.

Understanding the dynamic nature of the relationship between designer and retail strengthens our call to make it easier for tourists to come here to shop; we all benefit when that happens.

In particular, we call on government to better understand the dynamic forces within the sector by including fashion retail in its definition of the creative industries (after all with many high street stores employing top-end designers, how can they not be part of the same business?), so that it can get the policy attention, and civil service resources, it needs. Government outdated-reporting and lack of understanding could lead to missed opportunities.

These strategic considerations are the first toe in the water in carving out a vision that spans the whole fashion sector. We need to work together to make the most of the opportunities fashion can offer to Britain. It is good economic sense, it's a mass artistic movement, and at the end of the day, it represents innovation, dynamism, youth and hope.

## Skills, Training & Job Creation

The continued success of British fashion relies on future generations having the type of training and qualifications that business needs.

We have strong fashion colleges, with an unrivalled international reputation. As a starting point, these colleges need to be protected, given the opportunity to grow and embed their links into business. Attention is needed to ensure the new visa regime does not divert the world's best talent away from London.

Work has begun to map out training in all the various functions within the fashion industry. Where gaps exist, action must be taken to fill them, for example through carefully designed apprenticeship programmes. From top to bottom, and at all levels of technical ability, our fashion education system needs to be marching in step with the needs of our fashion industry.

### 1.1. Globally recognised colleges

Britain's fashion colleges are the engine-room for the whole industry, with a global reputation for excellence that is second-to-none. They work together under the auspices of the BFC Colleges Council to inter-twine fashion education with modern business practice, for example by collectively showcasing their students' work and offering national and international work opportunities and scholarships to new talent. Graduate Fashion Week provides a platform for colleges to show graduate collections and for students to gain additional media and industry recognition.

The alumni of Central Saint Martins read like a roll call of the world's finest creative talent with its global influence increasing year on year. Its reputation, like the Royal College of Art, attracts the best design students across the world to study in London. London's reputation as a hot bed of emerging talent starts at these colleges, without them or without the high standard of designer graduating from British colleges, the landscape of British fashion would be very different.

Success breeds success. Christopher Bailey, now Chief Creative Officer at Burberry, is a graduate of the Royal College of Art and like many of his counterparts heading up global brands, he now brings many new graduates into the organisation to work with him.

The London College of Fashion emphasises technical skills and business collaboration in all of the courses it runs. Its ten thousand students — of which half are full time, a third are international and 80% are in work six months after graduating — are taught to 'fashion the future' by understanding not only the social context in which they work, but also the reality of business.

“MORE INDUSTRY CONTACT HAS LED TO MORE OPPORTUNITIES IN STORE AND HEAD OFFICE ROLES FOR STUDENTS AND GRADUATES.”

*KAREN DENNISON,  
FASHION RETAIL ACADEMY*

“UNDERSTANDING THE INTERPLAY BETWEEN CREATIVITY AND INDUSTRY IS WHAT MAINTAINS LONDON AS A GLOBAL LEADER IN FASHION EDUCATION.”

*FRANCES CORNER, LONDON COLLEGE OF FASHION*

### 1.2. Focus on apprenticeships and training

More needs to be done to ensure that the skills coming out of colleges, at all levels, match the demands of business, as well as giving other routes into the fashion industry for non-designers. Apprenticeships can help and our focus now must be to ensure they are commonplace, accessible for both individuals and businesses and a viable option.

Mulberry for example, has helped make its UK production facilities sustainable through an apprenticeship programme in Somerset. By working with local schools and colleges it recruited and trained the apprentice workforce it needed in specific practical skills such as pattern-cutting, stitching and finishing.

But while these lower level apprenticeships may help larger firms obtain specialist skills, there remains a gap in the provision of higher-level technical and management skills for specialist fashion businesses.

The government's Creative Industries Council has established a Skillset Skills Group, to support the industry in identifying the skills gaps that exist and how they might be filled. At present, this group is exploring how to map the national apprenticeship scheme onto the specific needs of the fashion sector. One option might be to create higher-level apprenticeships to design graduates, perhaps at level 6 (post graduate) or 7 (PHD or equivalent), in addition to lower level NVQs targeted at school leavers.

In 2006, Sir Philip Green identified a gap in the market for teaching specialist fashion retail skills and so established the Fashion Retail Academy. It now has 700 students and the support of 85 brands including the Arcadia Group, Marks and Spencer, Next and Tesco. Last year 60% of its students went straight into jobs on graduating.

### 1.3. Considerations

We must build on our strengths to ensure that we are delivering the specialist skills that the whole industry requires to grow, not just the top-end designer talent. This means offering real, relevant qualifications alongside training — ensuring that the various career paths available are fully promoted and understood. The development of leadership skills to ensure that we have the commercial support to back our creative talent is also essential.

There is an expectation that British art colleges will deliver exceptional education to maintain Britain's reputation as being at the forefront of the creative industries. However, resources for the colleges and industry professionals aren't sufficient to maintain this reputation in the long-term. Increases in tuition fees means that the spectrum of those considering fashion as a career is narrowing. International cities and governments are looking to how London and the UK has achieved its reputation for innovation and creativity in fashion and are investing in emulating our fashion education. If we don't do the same we are at risk of losing one of our country's key competitive advantages — the creation of talent. Politicians must ensure their actions do not damage the assets we already have. To remain globally competitive, the funding of our fashion colleges and departments needs protecting.

Immigration restrictions that prevent international students from building sustainable relationships with UK-based businesses, or restrict the availability of staff, are a problem not only for the sector's future growth but also for the global attractiveness of our fashion colleges.

The industry must continue its efforts to fully map all fashion career routes, ensuring they are professionalised at all stages to make the most of our talent, and establishing new qualifications and institutions where required. A fresh approach to vocational training for fashion should be developed with Skillset, including the potential to establish a Group Training Association to co-ordinate key training requirements. This should also include building on the Fashion MBAs and developing links between fashion and business schools to develop leadership and entrepreneurial programmes targeted at small businesses.

Across the board, the priority is to integrate top-notch business expertise and technical skills with our long-established reputation for creative brilliance.

“DESIGNERS IN THE UK UNIQUELY COME OUT OF ART COLLEGE RATHER THAN DEDICATED FASHION COLLEGES: THIS MAKES BRITAIN UNIQUE IN THE WORLD.”

*LOUISE WILSON,  
DIRECTOR, MA COURSE, CENTRAL SAINT MARTINS*



Retail

One of the strengths of the British fashion industry is the strong links between the designers and retailers. There are responsive feedback mechanisms between the two: the trends and innovations created by the designs shown on the catwalk drive consumer demand and engagement, by reflecting these trends the high street brings fashion sensibility to a broad audience.

Through working directly with designers and creating accessibly priced ranges, retailers not only provide the designer with much needed income but also high levels of awareness.

In addition to this, many of our high street fashion brands support the overall talent pool through their relationship with the British Fashion Council, support and sponsorship of London Fashion Week and contribution to the talent pathway schemes available to young designers from college upwards.

It has been a winning formula in recent years, with London's and the UK's retail landscape, including high street, department stores and global luxury brands attracting tourists to the UK, coming specifically to shop.

To fully understand the forces at work, and so better be able to exploit them, government needs to accept that retail fashion is an integral part of the creative sector. Thinking of it in this way will incentivise more supportive policies.

### 2.1. Retail impact

People are increasingly spending more on what they wear. In the 2010 report, The Value of Fashion, Oxford Economics and the British Fashion Council showed that the value of the retail market — be it for clothing, jewellery or footwear — rose by around 30% in the preceding ten years. Despite challenging trading conditions, the sector continues to contribute significantly to the British economy.

On-line retail is an area of growth, with many British businesses such as Net-a-Porter leading innovation in this area, establishing and developing a loyal global market. The market research company Mintel has shown that on-line fashion sales rose by 152% from 2005 to 2010. Indeed by 2010, one in three British people were buying their clothes on-line, with that proportion rising rapidly. UK on-line fashion sales are expected to be worth £7bn by 2015.

Tourism has also been a factor in retail success. A quarter of a million tourists cite “shopping” as their main reason for coming to the UK annually, according to VisitBritain, worth around £41m in sales to the fashion sector. Fashion tourism from mainland China has seen a significant increase over the past few years, with many leading retailers introducing China Union Pay and seeking staff who speak Mandarin to maximise on this opportunity.

Of the 816,000 jobs in the fashion industry in 2009, 660,000 were in retail, many of these are the first steps into employment for young people — more than half of retail fashion workers are under 30 years old.

“ON-LINE FASHION  
SALES ARE  
EXPECTED TO  
BE WORTH £7BN  
BY 2015.”

*MINTEL*

“GOVERNMENT  
NEEDS TO ACCEPT  
THAT RETAIL  
FASHION IS PART  
OF THE CREATIVE  
SECTOR.”

*VALUE OF FASHION REPORT*

### 2.2. High fashion meets high street

British retailers were the first in the world to bring named designer collections onto the high street, democratising the high end of fashion. This year Topshop celebrates its 10 years of supporting NEWGEN designers at London Fashion Week (the British Fashion Council's longest standing and highest profile emerging talent support scheme). Through this sponsorship and relationship with designers Topshop has become synonymous with trend and young British talent. Several British retailers such as Marks & Spencer, River Island and New Look now collaborate with British designers, the ‘Designers at Debenhams’ concept supports the success of many British designer businesses. There is now a symbiotic relationship between the high street and the catwalks in the UK, with responsive feedback loops working in both directions. Otherwise known as a ‘dynamic demand cycle’, where innovative cutting-edge talent from the catwalks is made available to retail customers at affordable prices, which in turn ploughs resources back into the top end of the sector.

The challenge is finding the tools to explain this to policy makers. At present, retail fashion is not included in the government's definition of the creative industries and so its true nature is not captured. This is an anomaly — if, for example, creative talent in television led to a programme being watched by millions, its economic impact is captured as part of the creative industries and policy attention is then focused on replicating that success.

But if a creative talent in fashion leads to a garment being purchased by millions, the economic impact of that is merely categorised as ‘retail’, with its links to the designer sector unnoticed and below the radar of active policy development.

### 2.3. 2012 Opportunities

The London Olympics and Diamond Jubilee in 2012 gives a once-in-a-lifetime opportunity to channel the attention of the world, and the millions of visitors to the UK this year, towards British fashion. The Australian property group, Westfield Shopping Towns, was quick to recognise this with the development of the Westfield Stratford shopping centre. The government should seek to maximise the opportunities for British fashion from the Olympics, ensuring that travel between the games and shops is seamless.

During the Olympics and beyond, there should be no hurdles to maximising the number of tourist visas that are issued to potential shoppers, particularly from the rapidly growing Chinese market.

“THE OLYMPICS  
AND THE DIAMOND  
JUBILEE PROVIDE A  
REAL SPOTLIGHT ON  
LONDON AND BRITAIN.  
TO THE EYES OF THE  
WORLD THERE WILL  
BE A FOCUS ON US.”

*ANNE PITCHER,  
MANAGING DIRECTOR, SELFRIDGES*



**Manufacturing**

Britain's manufacturing base has shrunk in the last few decades, and within that the demise of fashion manufacturing has been even more acute.

But there are still some opportunities for UK fashion manufacturing, such as quality and luxury products. Over half the designers showing at London Fashion Week make some of their collections in the UK.

Similarly retailers such as John Lewis and Topman have recently begun to understand the positive consumer response that comes from championing those products that are made in Britain. Designers including Aquascutum, Burberry, Mulberry and Victoria Beckham proudly sew 'Made in Britain' into the garments and products they make here.

In order to build on these encouraging developments, the industry must come together carrying forward the work of the Fashion Manufacturing Alliance (British Fashion Council, Centre of Fashion Enterprise, Skillset and UKFT).

It needs to identify latent demand for UK manufacturing facilities, and work to plug the gaps and build the necessary skills to optimise this opportunity.

**“WE NEED AS MUCH FOCUS ON THE NEXT GENERATION OF PRODUCTION TALENT AS THERE HAS RECENTLY BEEN ON NEW DESIGN TALENT. WE NEED TO TEACH YOUNG PEOPLE HOW MANUFACTURING WORKS, ATTRACT THEM TO THE JOBS AND TEACH THEM THE SKILLS THAT WILL ENABLE US AS A NATION TO COMPLETE THE JOB — TO DESIGN, MAKE AND SELL. THE FASHION RETAIL ACADEMY HAS PROVEN THAT YOUNG PEOPLE WANT TO COME INTO THE BUSINESS, TO LEARN THEIR TRADE AND GET A JOB, WE NEED TO TRAIN YOUNG PEOPLE IN ALL ASPECTS OF THE BUSINESS”**

*SIR PHILIP GREEN, ARCADIA GROUP*



### 3.1. The return of manufacturing

The last fifteen years have seen a dramatic fall in UK manufacturing as emerging markets have become more competitive. Oxford Economics estimate that the value of UK fashion manufacturing has fallen by two-thirds since 1995.

More recently, however, some companies have started to see the benefits of manufacturing in Britain, both in terms of reducing carbon emissions through less travel, greater production flexibility and positive brand association.

Topman used Harris Tweed to create a unique collection for the last two seasons which has sold out. They also had a successful 'Made in England' traditional tailoring range. John Lewis is introducing a new 'Made in GB' label and is training its buyers to increase the number of products that qualify for it.

Many of London's design community produce some of their collections in London. Whilst there are challenges around price and capacity, the close nature of the manufacturing facilities enable easier management of production.

To support this trend, a new Designer-Manufacturer Innovation Support Centre (DISC) will shortly launch through the London College of Fashion, to provide advice and support to designers and manufacturers on global and UK fashion sourcing, sustainability, jewellery manufacture and design and technical innovations. The UKFT has an on-line directory of UK suppliers under the slogan 'Let's make it here' and a new UK Fashion Hub in East London states its aim to unite the mainstream 'UK fashion and textile industry'. Through anecdotal evidence there appears to be demand and opportunities in this area, with resources and a focused strategy to address the breadth of challenges from skills training to investment, more can certainly be achieved.

**“MAKING IS INNOVATING. WE HAVE REALLY FANTASTIC CREATIVE DESIGNERS IN LONDON WHO RIGHTLY HAVE HAD THE FOCUS, LET'S SUPPORT THEM WITH INNOVATION THROUGH MAKING NOW.”**

*WENDY MALEM,  
DIRECTOR, CENTRE FOR  
FASHION ENTERPRISE*

### 3.2. Barriers to re-industrialisation

In this highly competitive market, Britain's advantage is its reputation for quality and innovation over price. This suggests that the future of British fashion manufacturing lies in specialist, highly skilled production with an emphasis on the concept of small/atelier type units serving the designer sector. Britain's existing reputation makes us well placed, for example, to capitalise and develop existing centres of excellence such as knitwear, leather, tailoring, woven material, finishings and trimming.

But work is required if this potential is to be realised. There is a problem, for example, on the capacity side. Designers and retailers do not always have the confidence that orders can be fulfilled to the required standard in the UK, or that the capacity exists to undertake large-scale production. This is a vicious circle. If the orders go abroad then the British skills become obsolete, making it even less likely that future orders will be placed here. A significant number of manufacturers report issues around investment and cashflow that restrict their growth despite the demand for their product.

The skills required to manufacture at the highest level necessitates training at a level not provided for in the existing apprenticeship and qualification framework. As a result many small manufacturers are looking at Eastern Europe to source labour to meet growth. This needs to be addressed with Skillset.

Another issue is around the image of jobs of this type. The current labour force in the textile manufacturing sector is ageing — 60 per cent are over 40 years old — with little enthusiasm from younger people to learn their skills.

Manufacturers themselves are fragmented and would benefit from greater co-ordination, something that the Fashion Manufacturing Alliance has started to address through seminars where manufacturers can get together to discuss key issues.

Finally, there are problems of information. Designers developing ideas may not know what can be done within the UK, and production units may not know where their market lies.

Oxford Economics have taken a look at UK manufacturing trends in this sector over the past three years and using ONS data, anecdotal evidence from retailers and designer businesses, have applied a macro model to create a conservative scenario of what continued increases in UK sourcing may contribute to GDP.

### 3.3. Let's make it in Britain

These problems are not insurmountable; they just need to be prioritised. First of all, a mapping exercise is needed of the existing manufacturing capability in the UK fashion sector and the current bottlenecks experienced by designers and retailers. A quick win could be a rated directory of UK manufacturing options for use by designers. In the longer term the exercise could bring designers and manufacturers together so that they can forge new relationships. It may be, for example, that there is unmet demand to make small sample batches of new designs in locations that are physically near the creative centres; this in turn could be a useful way to ensure that British manufacturing skills are kept up-to-date.

In sectors where we already have a comparative advantage, there needs to be as much focus on the next generation of production talent as there has recently been on new design talent. Fashion production needs an image make-over, with more emphasis on careers in craft and artisanship, and less on traditional manufacturing. As a first step, the industry should work to provide clear routes into craft apprenticeships — accessible in many different ways — that offer technical, designer, marketing, retail and production experience and so help professionalise the 'making' side of the fashion industry whilst strengthening the whole supply chain within Britain.

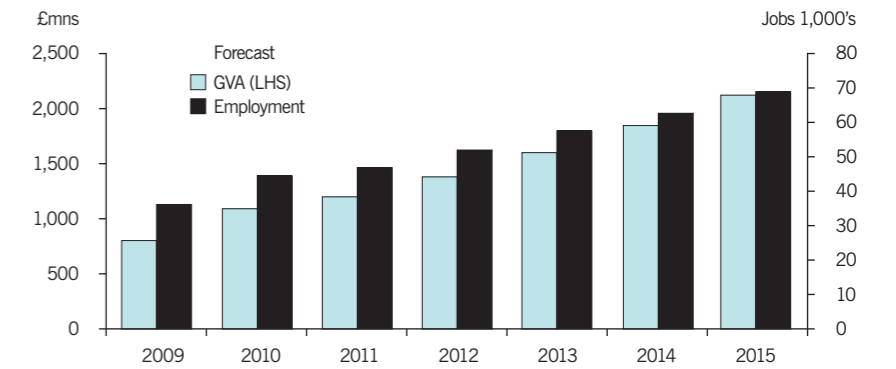
**“OUR ‘MADE IN ENGLAND’ RANGE OF TRADITIONAL TAILORING SOLD REALLY WELL, THE SPEEDY DELIVERY AND OPPORTUNITY FOR SMALL RUNS IS A REAL BENEFIT TO UK PRODUCTION. IF THERE WERE MORE MANUFACTURING SOURCES IN THE UK, WE WOULD LOOK TO USE THEM.”**

*DAVID SHEPHERD,  
BRAND DIRECTOR, TOPMAN*

### Oxford Economics Manufacturing Data Regional breakdown of UK fashion industry manufacturing in 2011

	Manchester		Leeds		Northampton		Scotland		London	
	GVA (£mns)	Jobs	GVA (£mns)	Jobs	GVA (£mns)	Jobs	GVA (£mns)	Jobs	GVA (£mns)	Jobs
Footwear	—	—	—	—	19.4	878	0.3	17	3.7	238
Mens	3.4	192	13.0	381	0.4	20	27.3	1,449	18.6	1,183
Womens	7.4	420	9.0	264	1.5	69	45.2	2,393	61.9	3,934
Childrens	1.5	84	0.3	9	0.2	10	9.9	527	4.0	253
Cosmetics/Beauty	0.1	3	17.9	494	0.2	10	17.6	463	18.5	341
Jewellery & Watches	0.7	29	1.8	26	0.1	2	12.0	395	85.9	1,632
Accessories	0.4	24	0.4	11	0.3	13	3.5	186	4.1	262
Luggage & Bags	0.1	2	—	—	0.9	23	2.8	63	15.4	249
Hair	0.5	17	1.4	19	4.2	53	9.8	296	11.2	196
Lingerie	0.1	4	0.3	7	—	—	0.3	17	3.6	229
<b>Total</b>	<b>14.2</b>	<b>776</b>	<b>44.2</b>	<b>1,211</b>	<b>27.4</b>	<b>1,078</b>	<b>128.8</b>	<b>5,806</b>	<b>226.9</b>	<b>8,516</b>

### UK Clothing and Footwear



### Key Findings

- Fashion's share of manufacturing output has grown since 2009. Its share of manufacturing employment output has grown from 2.0% to 2.5% between 2009 and 2010 and was estimated to grow still further to 2.7% in 2011.
- Data indicates that the UK fashion manufacturing sector faced extremely tough trading conditions in 2009. While the turnover of the wearing apparel manufacturing industry fell by 8% (compared to a 10% fall for manufacturing as a whole) value added plummeted by 27% indicating a severe squeeze on profit margins.
- The good news is that fashion manufacturing is recovering comparatively quickly, with designer brands and the high street promoting British provenance, heritage and luxury. Oxford Economics estimate that fashion's share of manufacturing GVA rose from 1.3% in 2009 to 1.7% in 2011.
- The figures for 2012-2015 are based on current data and anecdotal feedback from retailers and designers regarding their increase in UK sourcing over the past 12 months. Oxford Economics used this data to create a scenario that saw this growth rate continue year on year until 2015. Based on this scenario and current growth rate the UK could see fashion manufacturing (more narrowly defined to include just clothing and footwear) contribute £2.1bn to GDP and 68,900 jobs, an increase of 79% and 47% respectively in just four years from £1.2bn GDP contribution and 46,900 jobs.
- With increased investment and support for the manufacturing sector it is possible these growth rates could be achieved with potential for a more significant impact.
- There is also a risk here, with an ageing population in manufacturing, if no action is taken to train and develop labour forces in existing manufacturing units, growth will be limited and will decline in the longer term.
- The great thing about UK fashion manufacturing is that there are pockets of excellence, experience and skills throughout the country. Oxford Economics reviewed some of these key areas identified in the 2010 Value of Fashion Report.

## Talent Creation and Development

The priority is to build a global market for British fashion talent. Not only does that generate strong economic benefits for UK plc but it also strengthens our international reputation for creative excellence.

The industry understands the role that top-end talent plays in engaging consumers and driving sales both at the designer end and throughout the fashion retail business. Indeed design innovation is in many ways the R&D department for the entire industry. Everyone benefits when a young designer is supported from college all the way through to establishing and expanding a global business.

We have much to be proud of in the creation and nurturing of UK talent. The challenge going forward is to protect our existing strengths, ensuring for example that London Fashion Week remains a world-class event, whilst accelerating the pace at which that success is translated into the creation of sustainable businesses. London is now known globally for ideas, creativity, and commerciality — we must build on that.

“MUCH HARD WORK HAS LED TO BRITAIN BEING TAKEN SERIOUSLY AS A FASHION BUSINESS HUB AS WELL AS A CREATIVE HOT HOUSE.”

*CAROLINE RUSH, CEO, BRITISH FASHION COUNCIL*

#### 4.1. Showcase Success

London Fashion Week is the route through which British fashion design talent is led to market. It is a phenomenal success, establishing London as one of the four main fashion capitals in the world. Twice a year it acts as a magnet for the most influential global fashion commentators, attracts over £100m of media coverage, boosting the brand of British designers and Britain, and bringing millions of pounds of additional spend to the London economy.

London Fashion Week is at the forefront of innovation — it was for example, the first Fashion Week to live stream catwalk shows and create a dedicated digital innovation strategy. The British Fashion Council, organisers of London Fashion Week, create new focuses on British businesses each year through the creation and development of talent support initiatives in response to the fast moving needs for businesses to drive profile and growth in this global industry. This year the British Fashion Council extends its initiatives to embrace fine jewellery (RockVault) and fashion film (Fash/On Film). It has already announced the creation of a brand new showcase for British menswear, culture and style (London Collections: Men) which will launch in June.

And it travels well. Twice a year the British Fashion Council takes a selection of designers to meet prospective buyers, media and other potential partners/influencers in Paris, New York, Los Angeles, Hong Kong, and for the first time this year, mainland China.

As a result, sales are up. Oxford Economics estimates that sales of UK designer clothing have been rising by around 20% a year in the last decade, and are currently worth somewhere between £2.5 and £2.9 billion.

“THE BRITISH FASHION COUNCIL IS COMMITTED TO ASSISTING DESIGNER BUSINESSES TO GROW AND THE SECTOR TO FLOURISH, SEEKING OUT AND DEVELOPING NEW WAYS TO BUILD PROFILE, AUDIENCE AND OPPORTUNITY”

*HAROLD TILLMAN,  
CHAIRMAN,  
BRITISH FASHION COUNCIL*

#### 4.2. BFC Talent Pathway

Behind the catwalks, huge efforts have gone into nurturing talent to a level of quality where it can hold its own on the world stage and then, crucially, transition into a sustainable business. This work has paid off: Britain is now taken seriously as a fashion business hub as well as a creative hot house.

The BFC NEWGEN programme, now in its 15th year, and sponsored by Topshop for the last ten years, provides financial support for the costs of showing at London Fashion Week, as well as business mentoring. Alexander McQueen was one of the first designers on the programme; many other successes have followed.

The British Fashion Council now provides a pathway of support for the most talented businesses throughout the early years of development. A programme with Elle, the BFC/Elle Talent Launch Pad, supports designers to build relationships with retailers throughout the UK. BFC Fashion Forward supported by the Mayor of London, provides support for designers post NEWGEN to continue to show and develop their businesses in London. Working with Vogue, the BFC/Vogue Designer Fashion Fund, develops global profile and provides infrastructure support.

Separately other organisations including Fashion Fringe and Fashion East hunt for new talent and support individuals to develop portfolios that are good enough to show at London Fashion Week. The Centre for Fashion Enterprise is an incubation unit that provides studio space and mentoring for designers “who already have the press buzzing”, supporting them as they develop into sustainable businesses. There are also a number of other organisations that showcase and support fashion talent throughout the UK.

““NINE YEARS AGO THE DESIGNERS IN OUR STABLE WOULD SHOW ON THE CATWALK FOR TWO SEASONS THEN GO BUST, NOW SUSTAINABLE DESIGNER BUSINESSES ARE SEEING THEIR TURNOVER GO UP AND UP AND UP.”

*WENDY MALEM, DIRECTOR,  
CENTRE FOR FASHION  
ENTERPRISE*

#### 4.3. Building on our Success

Now that we have learnt what works when bringing design talent to market, it is time to put our foot on the accelerator.

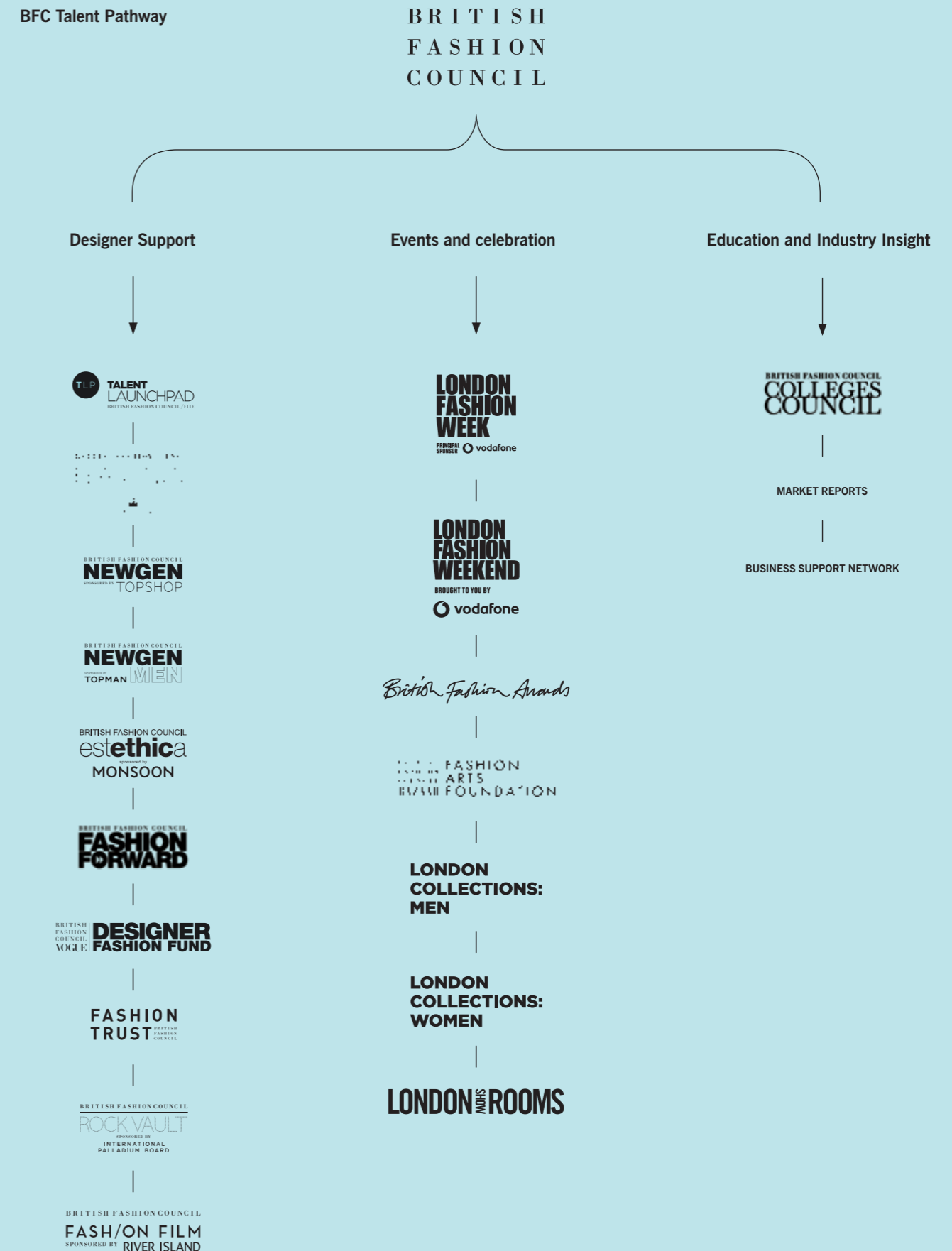
The first priority must be to secure the future growth and development of our highly effective showcases. The British Fashion Council, working with the industry must do its part to remain cutting-edge. But politicians have a role as well. Specifically, funding for London Fashion Week (the UK’s global showcase for talent) from the Mayor of London must be protected. And, the government agency UK Trade and Investment (UKTI) must be sure to continue funding the guest programme, that enables important influencers to come to London and experience Fashion Week which in turn generates millions of pounds of media coverage raising the profile of British businesses, and millions of pounds of orders supporting growth.

Next, we must expand our international showcases particularly in new and emerging markets, securing both public and private support as required. The European Regional Development Fund and UKTI have enabled the British Fashion Council to kick-start the highly effective programme of London show Rooms with strong support from industry ambassadors Sarah Mower and Tim Blanks. This initiative is now a proven method of supporting emerging talent to grow and the British Fashion Council to promote the breadth of British talent internationally. It needs support to develop further and to ensure it becomes sustainable — allowing it to support future generations.

The British Fashion Council’s existing talent pathways must be strengthened, learning from what works, with alumni encouraged to give a helping hand to future talent. The British Fashion Council aims to broaden access to its knowledge through the re-launch of the Designer Fact File, providing an on-line, up to date, education resource and information hub for emerging talent and developing businesses.

And finally, the progress that has been made in supporting young designers to build sustainable businesses needs to be accelerated and replicated. Our ambition is that London should continue to be the best place in the world to incubate and grow a fashion business with support to go from strength to strength.

#### BFC Talent Pathway





**Philanthropy, Sponsorship and Collaboration**

Fashion is not just an important contributor to our country's prosperity; it is also a highly accessible art form. It contributes to our cultural wellbeing as well as our economic lives. British fashion is iconic, capable of capturing the prevailing mood and uniting whole generations.

Its ability to engage makes it one of the most democratic of art forms. It allows freedom of expression and encourages experimentation. This not only opens the potential for exciting collaborations between designers and artists but gives opportunities to attract corporate and private funding into the sector.

Fashion is shorthand for innovation and dynamism. These are positive brand associations that open the way to sponsorship opportunities. And the brand of Britain itself can benefit from being associated with a strong, youthful and vibrant fashion industry.

### 5.1. Fashion as an art form

Fashion is one of our most democratic art forms; all of us are saying something about our perception of the human condition when we decide what it is we want to wear. The outputs of the fashion industry have aesthetic value that affect the wellbeing of those whose lives they touch.

Because of this, there are aspects of the fashion sector that bear more resemblance to the arts than to industry. Witness, for example, the popularity of fashion exhibitions such as those at the Victoria and Albert museum which hosts a million international visitors per year.

The British Fashion Council has established the BFC/Bazaar Fashion Arts Foundation to spur collaborations between fashion and other creative disciplines. This pushes the boundaries of each art form and brings in a broader based audience through the mass appeal of fashion. This work will and should be accelerated.

This year, for example, as part of the London 2012 Festival, the British Fashion Council has commissioned new works from visual artists and fashion designers working together for the first time under the brand of Britain Creates 2012.

Creativity and collaboration in the sector add extra depth and appeal to consumer audiences and added value to those sponsoring and supporting activity in the fashion sector.

### 5.2. Dedicated followers of fashion

New audiences are now looking at British fashion businesses for many different reasons. Investors are attracted by the combination of creativity, innovation and commerciality that is coming out of London through designer and on-line businesses. This interest supported by the government EIS scheme, has the potential to see a new wave of investment into the sector that could support growth.

Conceptualising fashion as an art form opens up new opportunities to help it grow. In the arts, the concept of patronage is well established, with individuals becoming 'patrons of the arts' as a means of giving financial support to individuals, groups or venues. There is now growing interest in becoming a 'patron of fashion' as a parallel form of philanthropic giving to creative activity.

To capitalise on this interest, the British Fashion Council is creating its own patronage scheme. Entitled the BFC Fashion Trust, it co-ordinates a global network of patrons who offer financial support, mentoring and a global support network for designers. This will include the opportunity for designers to meet potential investors. This scheme will be officially launched later this year.

### 5.3. Rejuvenating Britain's Brand

The fashion industry is rightly perceived as dynamic, young, vibrant, and hopeful. These are highly valuable characteristics from which other brands benefit by association. Thanks to its content and inspiring creativity, fashion provides many benefits for sponsors (particularly through a global platform such as London Fashion Week). It reaches out to consumers with year round visually arresting content, information on trends and access to designers and other high profile influencers in an environment where they are receptive. The fashion industry in the UK has adapted quickly to the growth in digital media, embracing social media, live streaming, fashion film, and technology such as Aurasma to enhance user experience, and through this increase profile and influence internationally. Based on ONS data, Oxford Economics have estimated the value of the UK domestic brand equity to be around £200m.

Vodafone, the new principal sponsor for London Fashion Week and title sponsor of Vodafone London Fashion Weekend has made a firm commitment to the fashion industry. Through this partnership, Vodafone is able to provide unique access to high profile fashion events for its customers through the Vodafone VIP programme, but is also providing a strong platform for design talent through support of London Fashion Week. In turn the British Fashion Council's innovation programme is enhanced through Vodafone's knowledge and resources to assist in driving broader awareness of fashion opportunities by introducing customers to fashion businesses. London Fashion Week now attracts global brands that are not only sponsors but long term partners to the British Fashion Council, helping it to develop and promote British fashion. The industry in turn must continue to develop opportunities that combine a unique access with mass appeal, this will allow it to attract new commercial partners to support delivery of industry initiatives and activity.

There is an opportunity for the country as a whole. By championing the success and potential of British fashion, both as an art form and an industry, its positive associations and characteristics can rub off on how Britain itself is perceived. There is a real opportunity for politicians to get behind this dynamic sector and to dedicate civil servants to help drive it forward. Not only does it help to spur an important sector of the economy but it can also boost Britain's brand as a whole.



THE FASHION INDUSTRY IS RIGHTLY PERCEIVED AS DYNAMIC, YOUNG, VIBRANT AND HOPEFUL. THESE ARE HIGHLY VALUABLE CHARACTERISTICS FROM WHICH OTHER BRANDS BENEFIT BY ASSOCIATION



## Conclusion and Summary of Recommendations

British fashion has much to be proud of. Over the years we have built world class expertise, particularly in the development of top-notch designer talent through our colleges, and the ability to showcase that to the world through London Fashion Week. And all this has been done in a way that works with and energises the high street and retail sector to achieve growth, attracting substantial tourist trade.

The UK has become known for its innovative design and the innovation and resurgence of its heritage brands. The designer sector can learn a great deal from successful British brands which have seen success through strong leadership, commercial know-how, creativity, innovation and engagement with the broader creative sector.

Fashion retail contributes considerably to UK plc, it is the financial centre of the sector and in turn significantly supports the full spectrum of development from colleges through to designer. The power of bringing together just one area of the industry has been seen through the success of the Fashion Retail Academy. Now, more than ever, the industry must come together as a whole, retailers, designers, colleges, manufacturers, publishers and all those with a vested interest, including government, to support the future growth of this sector. We are world leaders in many aspects such as design, retail and education, we must protect these and develop more.

This document has identified areas of expertise and areas that require urgent attention eg. the need to ensure our fashion business skills are as cutting-edge as our creativity, and to build on the recent interest to expand our niche manufacturing capability in the UK. Specifically, we recommend the following actions be taken in order that British fashion can realise its full potential.

### The British fashion industry must:

Unite to tackle and overcome challenges, to vision what is needed now and what will be required to compete globally in the future

Support colleges and scholarships to leading educational establishments and accessibility to British students (Chapter 1)

Develop specific programmes to address skills and training needs, working with government departments where necessary to support broad access and awareness of opportunities in the sector (Chapter 1)

Take advantage of all opportunities in 2012 (Chapter 2)

Develop UK production and pursue opportunities to bring together designers, retailers and producers to create the necessary skills in the UK (Chapter 3)

Develop skills and craft to support the creation of luxury products in the UK and give fashion production an image make-over, attracting talent into this arena (Chapter 3)

Understand and optimise the power of 'Made in Britain' (Chapter 3)

Support London Fashion Week and the British Fashion Council to develop opportunities to globally promote British designer businesses, providing enhanced reputation for the sector and Britain as a whole (Chapter 4)

Focus on maintaining London as the best place to incubate and grow a fashion business, including making more resources available on-line to fashion entrepreneurs (Chapter 4)

The sector and government should work hand in hand to attract investment and partners for British fashion businesses (Chapter 5)

Sponsorship opportunities in the fashion industry should be maximised (Chapter 5)

### Key areas for government focus identified in this document include:

Funding for fashion colleges must be protected (Chapter 1)

The easing of tourist visas will assist the UK in competing with other international shopping destinations (Chapter 2)

Resource for skills, training, information and business development in fashion manufacturing (Chapter 3)

Public funding for London Fashion Week and the international promotion of British fashion design talent needs protecting (Chapter 4)

The government should strive to champion British fashion, not only to help it succeed, but also to reap its positive brand associations for the country as a whole (Chapter 5)

### BFC Industry Patrons and Corporate Partners

Arcadia Group  
 Aquascutum  
 Aurora Fashions  
 Bicester Village  
 Burberry  
 Conde Nast Publications  
 Debenhams  
 GAP  
 Harrods  
 House of Fraser  
 HSBC  
 Jaeger  
 John Lewis  
 Labeblux  
 LF Europe  
 Mayor of London  
 Marks & Spencer  
 Mulberry  
 Hearst Magazines UK  
 Next  
 Selfridges  
 Tesco  
 Radley and Co  
 River Island

### London Fashion Week Sponsors

Vodafone – Principal sponsor  
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 F&F at Tesco  
 Glacéau Vitamin Water  
 International Palladium Board  
 Lavazza  
 LG  
 London Evening Standard  
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 Topshop  
 UK Trade and Investment

### London Fashion Week Contributors

American Express  
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 Jo Malone  
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