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“Tungate’s absorbing and thoroughly entertaining book examines the new rules of the global fashion industry... An impressive and authoritative overview of what is arguably the world’s original brand name industry.”

AdBrands

“Explores the popularization of fashion and explains how marketers and branding have turned clothes and accessories into objects of desire.”

Brand Republic

“This is the most fun non-fiction book that I’ve read in a long time, while simultaneously unique and useful. Written in a witty and readable journalistic style, this book unravels the magic behind an industry that uses more smoke and mirrors than Hollywood.”

Anoop Maini, Chartered Management Institute

“Useful nuggets.”

Financial Times

“Littered with amusing anecdotes.”

Marketing

“Includes brand strategy insights from designers such as Paul Smith and Diesel founder Renzo Rosso, interviews with influential industry figures and behind-the-scenes reports.”

Fashion Business International

“*Fashion Brands* includes exclusive quotes and insights into brand strategy from designers such as Paul Smith and Diesel founder Renzo Rosso.”

In-Store Magazine

“An interesting read for anyone involved in the fashion or marketing sector.”

International Textiles

“getAbstract.com recommends this book to marketers – even those who are not fashion minded – who want to rejuvenate their creativity and pick up some new sources of inspiration and style.”

www.getAbstract.com

“Dissects the fashion industry from high street to haute couture and gives a detailed history of fashion brands as well as explaining the influence of branding.”

Media Week

“The ‘back story’ of where goods come from and how they are manufactured and sold is always fascinating, which is why Tungate’s book so appealed.”

Publishing News

(This book is collected by Kazi Md. Yakub,
student of Bangladesh College of Textile Engineering and Technology,
34th batch.)

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FASHION BRANDS

Branding Style from Armani to Zara

2nd edition

Mark Tungate



London and Philadelphia

Publisher's note

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First published in Great Britain and the United States in 2005 by Kogan Page Limited.
Reprinted in 2005, 2006 (twice)
Second edition 2008

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120 Pentonville Road
London N1 9JN
United Kingdom
www.koganpage.com

525 South 4th Street, #241
Philadelphia PA 19147
USA

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ISBN 978 0 7494 5305 3

British Library Cataloguing-in-Publication Data

A CIP record for this book is available from the British Library.

Library of Congress Cataloging-in-Publication Data

Tungate, Mark, 1967–

Fashion brands : branding style from Armani to Zara / Mark Tungate.
p. cm.

Includes bibliographical references and index.

ISBN 978-0-7494-5305-3

1. Fashion merchandising. 2. Branding (Marketing). 3. Advertising—Fashion. I. Title.
HD9940.A2T86 2008
746.9'20688—dc22

2008011174

Typeset by JS Typesetting Ltd, Porthcawl, Mid Glamorgan
Printed and bound in Great Britain by MPG Books Ltd, Bodmin, Cornwall

*For my sister,
whose fashion icons are Audrey Hepburn and the Ramones –
and who somehow manages to combine the two.*

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Acknowledgements

Writing a book like this is inevitably a collaborative process – which is just a posh way of saying that I owe a lot of people a drink. Firstly, I'd like to extend my sincere thanks to all those quoted within these pages. I would also like to thank Randy Weddle of the *International Herald Tribune* for inviting me to the paper's conference, *Luxury 2004: The Lure of Asia*.

I am indebted to Sarah Blackman for suggesting that I get in touch with Virginie Bertrand of Prêt-A-Porter Paris – and to Virginie herself for opening her contacts book. Nick Hurell of M&C Saatchi deserves a special mention for putting me in contact with two of the most famous gentlemen in fashion journalism.

Here, I hope, are the other members of a stylish crew: Alice Playle at Asprey; Antonella Viero and Silvia Rebuli at Diesel; Daria Genoese at Giorgio Armani; Didier Suberbielle at Condé Nast France; Drieke Leenknecht at Nike; Eileen Le Muet at *L'Express*; Iona Peel and Richard Gray at Harvey Nichols; Polly Stevens at MTV; Richard Hill at Beverly Cable PR.

Last, but by no means least, I would like to thank Géraldine Dormoy, without whose knowledge, support and diligent research this book would never have been completed.

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Preface to the new edition

This is the first time I've had to revisit a book, and I didn't realize how hard it would be. Once a book is done, it's done. You read the proofs, make a few corrections, and a few months later the thing is sitting on your bookshelf, the object of your proud glances until you get over it and move on to the next project. That was certainly the case with *Fashion Brands*.

And now, unexpectedly, it's back again. Re-reading the manuscript was a slightly painful experience: I suddenly became aware of all its faults; the phrases that jarred, the errors of judgement. And yet there were paragraphs I was surprisingly pleased with. It was as if I'd discovered a neglected T-shirt in a bottom drawer and, holding it up, realized that I still liked it.

The question is, why update the book at all? The answer lies in the final lines of the conclusion: 'This is a book about fashion. Tomorrow, everything will have changed.'

So what has changed since 2005? Most of the predictions I wrangled from fashion luminaries turned out to be – or are turning out to be – on the money. Evidence of the impact of cheap imports from China can be seen all around us. As I write, I am wearing a cashmere sweater that cost absurdly little. Cashmere is everywhere now, and it has become ludicrously affordable. The label always reads, 'Made in China'. Luxury has become accessible, and so the luxury fashion brands have been forced to market harder – to instil those intangible 'values' that

justify their profit margins – and to up the ante in terms of quality and innovation.

It seems to me that, if anything, consumers have become even more obsessed with fashion than they were when I started writing the book. The affordability and accessibility mentioned above have undoubtedly contributed to this trend. But we shouldn't underestimate the power of the fashion bloggers, those independent commentators who were barely a blip on the screen just three years ago. Now, it seems, the internet is crammed with consumers expressing their opinions about brands, taking pictures of themselves in their latest purchases, or wandering the streets photographing other style mavens.

Until very recently, the only people who did this kind of work were professional trend trackers working for 'style bureaus': the intelligence services of brands. They were also the only people who had the courage to approach complete strangers and ask them to pose for a photograph. It takes more guts than you'd imagine: try it some time and you'll see what I mean. The interesting thing, though, is that people almost invariably say yes. They're flattered that the photographer admires their dress sense.

Once the bloggers realized this, the barriers came down pretty fast. Now the trendiest districts of the world's cities are full of colourfully-dressed young people taking pictures of one another for their blogs. I believe this phenomenon has changed the comportment of city inhabitants: now, anybody vaguely stylish almost expects to be photographed. In the morning, they dress for a new form of urban theatre.

This need to stand out from the crowd has inevitably influenced purchase patterns. To a certain extent, consumers have begun branding themselves. Individuality has become more desirable than ever – hence the increasing importance of customization. More and more brands are offering services that enable shoppers to adapt existing models to their own tastes, or even to create items from scratch. Men are rediscovering the joys of tailoring. Improved technology is enabling consumers to order customized clothing online. At the time of writing this trend is barely a ripple, but it will gather in size and pace over the months to come.

To reflect these changes, I've added an entirely new section about the rise of bloggers. I've also revisited the chapter about celebrities and fashion, to touch on the phenomenon of stars who try their hand at designing clothes. Partnerships between brands and celebrities for

marketing purposes are now so commonplace that they have almost become a cliché, which is only one step away from becoming unfashionable. Nonetheless, the iconic appeal of model-turned-celebrity-turned-designer Kate Moss, as well as the dozens of pop singers and movie stars who've ventured into fashion, has worked its magic on consumers.

I was also compelled to add to the section about 'ethical' fashion. The first edition of the book alighted briefly on this, but at the time it seemed like an underground movement. Now, with the sale of 'fair trade' and 'organic' goods on the rise and climate change firmly on the agenda, many consumers are questioning the ethics behind every item they buy, including clothing.

Other changes are less obvious: I wanted to extend my profile of the designer Matthew Williamson, for example, in the light of his brand's 20th anniversary. And I've made a few nips and tucks here and there to freshen things up, as the fashion industry is wont to do.

In the couple of years since the first edition of the book appeared, I've been surprised and gratified by the number of e-mails I've received from those who took something away from it. Most of them were from people who loved fashion, but weren't afraid to pick at the industry's stitches – to stretch it a bit and see if anything gave way. That was the original intention of this book, and it remains the case.

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Introduction

'You don't buy clothes – you buy an identity.'

The model struts towards the battery of cameras, profile held slightly aloft, walking with the curious avian gait that has evolved to flatter the lines of her dress. She does not spare a glance for us mere mortals in the wings; her attention is utterly focused on the arsenal of lenses at the end of the catwalk, which will whirl her image into the global maelstrom of the media barely an instant after she has turned away.

She pauses at the end of her purposeful march, a thigh thrust forward, a hand on a jutting hip, smiling at last as the flashes crackle around her like summer lightning. When she has given her audience what they came for, she swivels imperiously, flinging a contemptuous vestige of inaccessibility in their direction, before marching just as determinedly back to the oxygen-starved planet where only models, fashion designers and billionaires live.

For many consumers, the model's short stroll is the first image that springs to mind at the mention of the word 'fashion'. The runway show – with its combination of creativity, glamour and artifice – is one of the elements that drive us, again and again, to buy clothes we don't really need. It's difficult to think of an industry that does not have recourse to marketing in one form or another, but only fashion has such an overbearing reliance on it. When clothes leave the factories where they are made, they are merely 'garments' or 'apparel'. Only when the marketers get hold of them do they magically become 'fashion'.

There is nothing trivial about fashion. Although there is little consensus on the figure, it is estimated that the amount spent on clothing and footwear around the world tops US\$1 trillion a year. According to Verdict Research, the global luxury goods market is likely to be worth US\$450 billion by 2012. Fashion and leather goods account for the largest proportion of the sector, followed by perfumes and cosmetics, which are usually sold under the licensed names of fashion designers. Watches and jewellery take care of the rest. This vast industry is driven by a number of highly sophisticated marketing and branding techniques, which are well worth dissecting.

And it would be foolish of us to underestimate the importance of fashion in society. Clothes and accessories are expressions of how we feel, how we see ourselves – and how we wish to be treated by others. During my interview with the fashion photographer Vincent Peters (who has taken pictures of some of the most gorgeous people in the world, wearing some of the most expensive clothes), he said, ‘Fashion is too prevalent to be considered trivial. Even when you say you’re not interested in fashion, you’ve been forced to confront it. Fashion is everywhere. What you choose to wear or not to wear has become a political statement. You don’t buy clothes – you buy an identity.’

This identity is linked to brand values that have been communicated via marketing. Are you elegant, flighty, debonair, streetwise, intellectual, sexy. . . or all of the above, depending on your mood? Don’t worry: we’ve got the outfit to match.

But it’s not only the outfit that is on offer. Over the past decade or so, fashion has stolen into every corner of the urban landscape. Our mobile phones, our cars, our kitchens, our choice of media and the places where we meet our friends – these, too, have become subject to the vagaries of fashion. It’s not enough to wear the clothes; you have to don the lifestyle, too. Fashion brands have encouraged this development by adding their names to a wide range of objects, fulfilling every imaginable function, and selling them in stores that resemble theme parks.

People will go to extreme lengths to consume fashion. Not so long ago, there was a clutch of articles about kids being mugged – even killed – for their sports shoes. While I was researching this book, an uncharacteristically sensationalist article in the French newspaper *Le Figaro* suggested that teenage girls were selling their bodies to raise enough cash to satisfy their addiction to fashion. On a less dramatic scale, few teenagers are unaware of the importance of the right brand,

in the right colour, worn in the right way. And, as we're all teenagers these days, adults are becoming just as obsessive. The caprices of fashion are both exasperating and alluring. Its alchemy is mysterious. Most people, even if they refuse to be seduced by it, are intrigued by fashion. If I hadn't written this book, I'd certainly want to read it.

THE VIEW FROM OUT HERE

And who am I, anyway – your host for this tour behind the scenes of fashion? A year ago, I could make no claims to being an expert. I was just your average trade hack, writing about complex but faintly geeky subjects such as marketing and the media. Nor was I a fashion victim. Sure, I used to cruise second-hand emporia for those special Levi's with the red stitching on the inseam, but that was eons ago, before 'retro' morphed into 'vintage'.

My non-fashion background proved advantageous. I could ask naïve questions that a fashion journalist might not have dared to pose, for fear of undermining their credibility. I was not in the pay of the industry I was analysing (unlike glossy magazine journalists, who are in thrall to their advertisers), so I could afford to be objective. My distance from the subject enabled me to regard it with a certain irony. I admit to the occasional smirk.

This was not an easy book to research. The fashion industry, as you might expect, can be haughty and insular, and suspicious of outsiders. It was unlikely to open its arms to a journalist who wanted to deconstruct its marketing strategies. The luxury brands, particularly, are built like chateaux – their elegant façades masking impressive battlements. At first I thought the public relations people working at brands such as Chanel and Louis Vuitton were merely dismissive. I was wrong – they were being tactical. Their inaccessibility is part and parcel of their image. The sportswear brands, perhaps more surprisingly, were equally difficult to penetrate. All these brands are constantly on the defensive, as they present large and irresistible targets that the media love to pepper with negative coverage.

In general, the brands that are the most popular with the general public were the easiest to reach. Zara, despite everything I had read about its non-communicative media policy, threw open its doors to me. H&M was equally responsive. Diesel allowed me to wander around its

offices. It was amusing to see how the external image of each brand was evident in its internal culture. Diesel was garrulous and faintly surreal. Armani, which runs the gamut from jeans to very expensive suits, managed to be both formal and approachable, as befits a brand with such a wide range of different audiences.

The book owes a lot to the real fashion experts – the consultants and academics who are constantly monitoring the industry. I was aided by the fact that I live in Paris, which still sees itself as the capital of fashion. The French regard fashion in much the same way as the British see soccer – it is a national obsession. There is an unapologetically Francophile thread running through these pages, and I would argue that my location gave me access to books and articles that my Anglo-Saxon readers might not have seen.

I did not stay put, though – far from it. Although Paris and London were my main hunting grounds, my task also took me to Milan, Molvena, Stockholm, Galicia and Hong Kong. That was just the physical sphere of my activity. Via e-mail and telephone, I travelled to New York, Tokyo and Los Angeles, too. Fashion brands, like fashion trends, do not allow borders to get in their way.

GETTING CHANGED

It is a good time to write about the fashion industry. The sector is in the midst of an important phase shift. For one thing, it is still struggling to absorb the impact of changes to textile trade regulations in January 2005. The scrapping of a long-standing quota agreement allowed China – which already dominated the market – to increase its exports, forcing the price of textiles down even further. Many fashion brands are trying to benefit from improved profit margins while resisting downward pressure on their prices. Mid-market chain stores are losing out to cut-price supermarket clothing and cheap and cheerful newcomers like Japan's Uniqlo. The gap (no pun intended) between added-value 'fashion brands' and everyday clothing is becoming more evident. Hence, more marketing imagery is needed to create the necessary aura of exclusivity.

One thing is certain: fashion, even at the top end of the scale, is increasingly about big business. Designers are admirably creative people, but they work for an ever-shrinking number of global conglomerates.

Under-performing brands are sold without a hint of remorse, no matter how talented and artistic the people behind them might be. The clothes a designer sends out on to the runway are worthless unless they increase sales of handbags, sunglasses and perfume. Thus, marketing has taken on a crucial significance, and no designer can afford to neglect it.

The designers are not always at ease with this situation. Lanvin designer Alber Elbaz – a man as softly spoken as he is sharply witty – relates an interesting anecdote. Elbaz learned his craft working for the legendary American designer Geoffrey Beene. One day, Beene asked the young Alber what he thought of a particular dress. ‘It’s very commercial,’ Elbaz opined. Beene took him gently aside and said, ‘Alber, you must *never* say a dress is commercial. You must say it is *desirable*.’

Until recently, I considered myself almost immune to brands and their influence. I was certainly suspicious of designer brands that charged a fortune for their labels. I was convinced that their clothes were no better than those of any chain store. I scoffed when a well-known fashion journalist told me during the Paris collections, ‘I have two jackets with me, one from Zara and one from Martin Margiela. The Margiela jacket was probably five times the price of the Zara one – but I don’t mind, because I like what Margiela stands for. I’m paying for the person, not the article.’ *Fine*, I thought, *you do that. But I won’t fall into the same trap*. Then, a few months ago, I bought a pair of glasses. ‘They’re by Yves Saint Laurent,’ said my optician. And, instead of yawning, I thought, ‘Ah, yes – the pioneer of prêt-à-porter in Europe.’

Working on this book enhanced my respect for fashion designers, past and present. There cannot be many creative professions in which you are expected to prove your talent with a large body of work at least every six months. In addition, many designers are involved not only with their own collections but also with those of other brands. Certainly, they have large design teams working alongside them – to imagine otherwise would be absurd – but they are the ones who take the flack if the press reception is chilly.

For those outside the industry, it’s probably easier to be cynical about fashion than it is to be admiring. As my research progressed, I found that I bounced like a pinball from one mindset to the other. I was surprised that many of the people involved in fashion marketing – the photographers, the art directors, the event organizers – retained a sense of humour about it. Yet they enjoyed grappling with an increasingly

intellectual challenge. Apart from the stores they are sold in – and the bags we carry them home in – clothes have no packaging. They just sit on shelves, waiting mutely to be judged on their own appearance. All the packaging has to be done externally; otherwise, how would we know that this particular shirt represents a whole range of emotions and messages that we are supposed to be buying into?

Fashion branding may be an ephemeral business, but it is a complex and endlessly fascinating one. How does one turn a mere ‘garment’ into an object with seemingly mystical transformative powers? Well, let’s hear it from the experts.

AUTHOR’S NOTE: The statistics and job titles quoted in this book were correct at the time of writing. All quotes were taken from original interviews or conferences, unless otherwise stated in the text. All translations from French sources are my own, and, although I tried to adhere as closely as possible to the spirit of the originals, I offer my humble apologies to those who feel I have not done their writing or observations justice.