

Geographica 16

Taylor Brydges

Made in Canada

The strategies, spaces and working
lives of independent designers in
the Canadian fashion system



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Abstract

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Drawing on 87 interviews with independent fashion designers and key informants, this thesis is a collection of papers which aim to explore the strategies, spatial dynamics and working lives of independent fashion designers in the Canadian fashion industry. The majority of fashion design firms in Canada are small independent businesses, typically run by an individual or pair of designers, with few employees. Independent fashion designers create unique small businesses, produce high quality garments defined by the label ‘made in Canada,’ strategically mobilize physical and virtual spaces within the national system, and yet, the long-term viability of these businesses is far from certain. The Canadian fashion industry is facing a number of systemic challenges relating to wider institutional and policy weaknesses that make it difficult to grow a long-term domestic or international fashion business. However, the findings also suggest that a key strength of the Canadian fashion system is that it offers a variety of spaces for designers of different sizes, scales, and motivations. Throughout this thesis lies the tension between the quest for independence and creative freedom, which often comes at the cost of highly precarious entrepreneurial and labouring conditions. This thesis contributes to our understanding of the dynamics of ‘second tier’ fashion cities and regional systems, the entrepreneurial motivations and working lives of independent fashion designers, the locational choice decisions and the mobility of patterns of creative workers in the digital age, and the evolving nature of intermediation and value creation within the fashion industry.

Keywords: fashion, labour, creative industries, Canada

Taylor Brydges, Department of Social and Economic Geography, Box 513, Uppsala University, SE-75120 Uppsala, Sweden.

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To Robin

Cover image: From the 1987 lookbook of the Robin Kay Clothing Company.
100% Cotton, one size. Designed, knitted, and distributed from
22 Mowat Street, Toronto, Ontario, Canada.
Designer: Robin Kay
Photographer: Deborah Samuels

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List of publications

This thesis is based on the following papers:

1. An “orphan” creative industry: Exploring the institutional factors constraining the Canadian fashion industry. Co-author with Rhiannon Pugh. Published: *Growth and Change*. (Early view).
2. A passion for fashion: Investigating the working lives of independent fashion designers in Canada. Single author. Under review: *Gender, Place and Culture*.
3. ‘Here, There and Everywhere’: How independent fashion designers mobilize mobility within the Canadian fashion system. Co-author with Brian J. Hrac. Under review: *Regional Studies*.
4. Made in Canada: Local production networks in the Canadian fashion industry. Single author. Accepted: *The Canadian Geographer*.

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1. Introduction

This thesis examines the contemporary Canadian fashion industry, focusing on independent fashion designers as the unit of analysis. It explores the strategies, spatial dynamics, and working lives of independent fashion designers in the Canadian fashion industry. This thesis was written during a particularly tumultuous time in the history of the Canadian fashion industry. Well-known and well-respected labels have closed. Toronto Fashion Week was cancelled. The retail landscape has been restructured by an influx of international department stores, fast fashion, and luxury brands. At the same time, Canadian designers abroad have won some of the most prestigious fashion awards in the world, while independent fashion designers at home have seen their clothes worn by royals and at the White House. Throughout it all, independent fashion designers have sought to carve out their niche. In Canada, independent fashion designers create unique small businesses, produce high quality garments, strategically mobilize physical and virtual spaces within the national system, and yet, the long-term viability of these businesses is far from certain. As will be demonstrated throughout this thesis, within the Canadian fashion industry, it is immensely difficult to grow a long-term domestic or international fashion business.

Despite being a highly gendered and feminized industry, male designers have historically – and continue – to dominate the highest positions in many of the most influential international fashion brands. In Canada, the majority of independent fashion designers interviewed were female, and a number were young and/or first-time business owners. This is an understudied group of entrepreneurial and creative workers. The fashion industry is highly creative and artistic, demanding specialized and technical skills relating to the design and making of a garment, and is highly-professionalized, requiring management and entrepreneurial expertise from those who start their own business.

Canada has been chosen as a case study location for a number of reasons. The fashion industry has a well-established global hierarchy of cities, designers, and brands, with much of the research on the fashion industry typically focuses on the global cities of fashion: New York, London, Paris, and Milan. These cities are home to the most influential fashion designers and industry-related events. Many urban

and national fashion industries aspire to achieve the success and status of the ‘big four.’ However, the fashion industry in these places is arguably difficult to imitate. Moreover, in an era of social media and democratization, the fashion industry is undergoing a period of intense disruption from local actors and new spaces. As such, this research seeks to contribute to a small, yet growing, body of research that examines tier two and/or emerging fashion industries, such as those in Australia, Belgium, Germany, New Zealand, and Sweden. Finally, the Canadian case is interesting and worthy of study in and of itself. Despite being described as an emerging fashion capital in recent years, the industry continues to face significant struggles. The Canadian case also provides the opportunity to study independent fashion designers operating in a variety of spaces and cities of different sizes, from the major cities of Toronto, Montreal, and Vancouver, to smaller cities such as Winnipeg and St. John’s, in order to explore variation at the local, regional, and national levels. The diversity of fashion businesses in operation across the country may prove to be one of the greatest strengths of the Canadian fashion industry. Using the Canadian case, this thesis also seeks to reflect upon the role of policy and local economic development in the evolution of contemporary creative industries.

1.1 Defining key terms

Before getting too far, it is necessary to define the key terms central to this thesis. Many of these terms can and have been defined by a wide array of actors, but for all intents and purposes, the following definitions are utilized. First, there are many different definitions or conceptualizations of fashion. The journal *Fashion Theory* defines fashion as: “the cultural construction of the embodied identity.” Admittedly, this definition is quite abstract. *The Encyclopedia of Literary and Cultural Theory* offers a more concrete definition that identifies both actors and spaces in the production of fashion. Here, Kawamura utilizes a production-of-culture approach to place fashion within a cultural context and distinguishes it from clothing:

“viewing fashion from the production-of-culture perspective allows us to study fashion from a systemic point of view, which provides a different angle to fashion. A set of organizations, individuals, and routine organizational activities that both materially and symbolically produce items of fashion culture can be described. This perspective locates culture in concrete social and cultural institutions” (Kawamura, 2010, pp. 1058-1059).

This definition is particularly useful as it allows for the recognition of the role of place in shaping the fashion industry, as well accounting for consideration of the different actors involved (such as institutions, organizations, and individuals) in the fashion industry.

Second, it is necessary to define the fashion industry. In the *Britannica Encyclopedia*, Major and Steele (2017) provide the following definition:

“The fashion industry forms part of a larger social and cultural phenomenon known as the “fashion system,” a concept that embraces not only the business of fashion but also the art and craft of fashion, and not only production but also consumption...The fashion system involves all the factors that are involved in the entire process of fashion change.”

From the field of economic geography, Hauge et al. (2009, pp. 530) also conceptualize the fashion industry as an industrial system, defined as “a system of interrelated actors within a specific socio-institutional environment.” These definitions, with a holistic focus on systems and the wide range of actors involved in the fashion industry, have guided the approach this thesis takes to the Canadian fashion industry. For example, while independent fashion designers are at the heart of this thesis, conceptualizing the fashion industry as a system meant it was also necessary to gain the perspective of key informants from the wide range of roles in the industry, such as journalists, bloggers, stylists, educators, fashion week executives, public relations firms, and government officials.

Given that the fashion industry is an extremely large and highly globalized industry, one way to narrow down the focus for research is to clarify which market segment of the fashion industry is under examination. For example, a 2016 report from the *Business of Fashion* categorized the fashion industry as comprised of six market segments, each defined by price: luxury, affordable luxury, premium/bridge, mid-market, value, and discount. While not explicitly defined in this report, independent fashion brands could be considered the seventh market segment, typically fall between affordable luxury and premium/bridge brands.

Finally, it is necessary to define what is meant by independent fashion designer. This study gains inspiration from the definition of independent by Hracz et al. (2013, pp. 1145): “Independent or ‘indie’ refers to individuals or small groups who produce cultural goods and services on their own. Examples include individual musicians who are not affiliated with record labels and fashion designers who produce customized items or single collections in small numbers.” In the case

of the fashion industry, I define independent fashion designers as fashion designers who, regardless of the size of their business, have control and responsibility for the day-to-day workings of their business.

1.2 Research objectives and questions

Four research objectives and four research questions drive this study. Each research question has been derived as an expression of the corresponding research objective. The papers that answer these questions provide an in-depth, empirically rich examination of the contemporary Canadian fashion industry. Table 1 provides an overview of the research objectives and research questions at the core of this thesis.

As formulated in the introduction, this thesis seeks to understand the industry from the perspective of independent fashion designers. However, in order to understand the dynamics of their working lives, it is necessary to first have an overview of the institutional context or landscape that is the contemporary Canadian fashion industry. This paper is an exploratory examination of the Canadian fashion industry that asks the question, why is the Canadian fashion industry struggling? This paper proposes a broad framework, taking into account the array of socio-economic, cultural, political, and historical factors that have shaped the industry that independent fashion designers are working in today.

Building on this foundation, the subsequent thesis papers focus at the micro-level of the individual and explore the ways in which independent fashion designers live, work, and seek to overcome the challenges they face in the Canadian fashion industry. The second objective of this thesis is to examine the pathways to employment, working lives, and nature of work for independent fashion designers in Canada. This corresponds to the second research question: who are independent fashion designers in Canada, and what are the challenges and rewards of this work?

The third objective of this thesis is to study the constellation of locational choice decisions available to independent fashion designers in choosing the home base for their business and the ways in which these actors move within the Canadian fashion industry. The research question, where do independent fashion designers locate their businesses and why, guides this avenue of research.

The fourth and final objective of this research is to unpack the production processes that are utilized in the creation of fashion garments in Canada, and how these processes can serve as an economic competitiveness strategy. Here, the research question is: what types of fash-

ions are sold by independent Canadian fashion designers, and where are these garments produced, distributed, and consumed?

Table 1: Research objectives and questions

Objectives	Research Questions	Thesis Papers
1. To provide an overview of the economic, cultural, and political landscape that makes up the contemporary Canadian fashion industry.	Why is the Canadian fashion industry struggling?	An “orphan” creative industry: Exploring the institutional factors constraining the Canadian fashion industry.
2. To examine the working lives and nature of work for independent fashion designers in Canada.	Who are independent fashion designers in Canada, and what are the challenges and rewards of this work?	A passion for fashion: Investigating the working lives of independent fashion designers in Canada.
3. To study the constellation of locational choice decisions and how independent fashion designers move within the Canadian fashion industry.	Where do independent fashion designers locate their businesses and why?	‘Here, There and Everywhere’: How independent fashion designers mobilize mobility within the Canadian fashion system.
4. To unpack the production processes that are utilized in the creation of fashion garments in Canada.	What types of fashions are sold by independent Canadian fashion designers, and where are these garments produced, distributed, and consumed?	Made in Canada: Local production networks in the Canadian fashion industry.

1.3 Contributions

The fashion industry is projected to reach \$2.4 trillion in total value in 2016 (Business of Fashion) and yet, is an industry that is not often taken seriously. Still, as McRobbie (1998, pp. 15) argues, “despite the trivialized status of fashion, it is a subject worthy of study.” Using a case study of the Canadian fashion industry, the papers in this thesis aim to make four specific contributions to the existing literature. First, the thesis engages with the literature on national systems of innovation to propose an analytical framework that takes into account a broad range of factors in analyzing the performance of a national creative industry. It is argued that the structure of the industry, historical evolution, culture/demand for fashion, socio-economic conditions, and policy environment place significant constraints on those working in the industry.

Second, this thesis probes the nature of work for independent fashion designers. It provides a comprehensive, on-the-ground account of their entrepreneurial experiences and spaces of work, from their previous labour and education, their entry into the fashion industry, and their daily working lives, with a focus on interrogating the tension between the desire for independence and creative control, and precarious employment.

Third, this thesis updates the literature on the locational choice decisions of creative workers, providing a detailed account of the different forms of mobility independent fashion designers strategically utilize in seeking to mediate the challenges associated with running their business. It considers the role of temporary mobility, mediated mobility, and virtual mobility in shaping nature of work for independent fashion designers, arguing that mobilizing mobility allows independent fashion designers increased geographic freedom to develop their business in different parts of the country.

Fourth, this thesis nuances the literature on production networks through providing an updated account of the processes that underpin local production networks in the Canadian fashion industry. While much of the fashion industry follows the logics of global production networks, independent fashion designers in Canada demonstrate a commitment to local production networks in manufacturing, distribution, and consumption processes, resulting in the label of made in Canada that is a defining aspect of their brands. Through harnessing local production networks, it is argued that operating outside of the traditional fashion system provides independent fashion designers with the space for creativity, innovation, and control over their brand,

but also creates challenges with respect to growth beyond their niche market.

1.4 Structure of the Thesis

This thesis has been written as a comprehensive summary, comprised of the following chapters, followed by a compilation of single and co-authored articles. Chapter two provides an introduction to the Canadian case, before presenting the literature review in chapter three. Chapter four delves into the methodology that informed this research. Chapter five provides a summary of each of the thesis articles, while chapter six discusses conclusions and themes of future research.

2. The Canadian case

This thesis draws on a case study of the Canadian fashion industry. A case study is defined as, “an empirical inquiry that investigates a contemporary phenomenon in depth and within its real-life context” (Yin, 2009, pp. 18). Case studies have been identified as an appropriate method for exploratory research on under-studied topics (Yin, 2009). Given the lack of previous research and data available on the contemporary Canadian fashion industry, this topic is well suited for a case study research design. This section will provide an overview of the structure of the Canadian fashion industry.

2.1 Overview of the Canadian fashion industry

Due to a lack of industry-specific data, it is difficult to gain a complete quantitative picture of the Canadian fashion industry. For example, fashion is included in the category “other specialized design services” by the Canadian Business Patterns dataset from Statistics Canada and as included in the category, “theatre, fashion, exhibit and other creative designers” in the 2011 Statistics Canada National Household Survey. This section will begin by providing an overview of the Canadian fashion industry from the limited data that is available (for a summary, see: Table 2).

A recent study of the Canadian fashion industry found that the direct impact to GDP from the fashion industry is \$790 million (Nordicity, 2015). In terms of employment, the fashion industry employs 3,240 people in core functions (such as a fashion designer), 3,960 in non-core functions (such as in manufacturing, distribution, and retailing related to the fashion industry), and an additional 5,620 people in administrative positions (Nordicity, 2015). According to the 2011 National Household Survey, “74% of the labour force is female, while 26% is male. Approximately one-half of those employed in this category works full year, full time, with a median employment income of \$24,027 CAD (Statistics Canada, 2011). This is also a highly-educated labour force, with 87% holding some form of post-secondary education (Statistics Canada, 2011). With respect to firm structure, the overwhelming majority of fashion design businesses are small firms. The Canadian Business Patterns reported only a single design business

with more than one hundred employees, and 499 businesses with one to four employees.

Table 2: Overview of the Canadian fashion industry

- Direct impact to GDP: \$790 million (Nordicity, 2015¹)
- Employment (Nordicity, 2015²)
 - *Core functions* (such as fashion design services): 3,240 people
 - *Non-core functions* (such as manufacturing, distribution, retail): 3,960
 - *Administrative roles*: 5,620
- Demographics (Statistics Canada, 2011)
 - *Gender*: 74% female, 26% male
 - *Work activity*: 47% work full year, full time
 - *Median employment income*: \$24,027
 - *Education*: 87% hold some form of post-secondary education
- Firm structure (Statistics Canada, 2013)
 - *More than 100 employees*: 1 business
 - *Twenty to one-hundred employees*: 22 businesses
 - *Ten to nineteen employees*: 15 businesses
 - *Five to nine employees*: 46 businesses
 - *One to four employees*: 499 businesses

2.2 The organization of the fashion industry in Canada

As Rantisi et al. (2006) found, most studies of creative industries focus on the contemporary situation in a particular industry and/or location, glossing over the fact that these industries have a history which has shaped their development. For example, Gertler (2009) has shown that the role of institutions in shaping economic development trajectories has been particularly overlooked. While other countries have taken concerted measures to organize, promote, and protect their domestic fashion industry, in Canada, it is a lack of institutional support that

¹ Nordicity GDP figure only accounts for the industry's direct impact and does not include the many indirect, induced and spillover impacts created by fashion designers and the fashion design industry, such as fashion weeks that are run across the country

² The analysis in the Nordicity report is based on cross-tabulations of existing data from the National Household Survey, North American Industry Classification System and the National Occupational Classification System.

stands out as a key factor in shaping the evolution of the fashion industry. The first international fashion councils were established between the late 1950s and early 1980s, including the National Chamber for Italian Fashion (1958), the Council of Fashion Designers of America (1962), Mode à Paris (1973), and the British Fashion Council (1983). More recently, ‘tier two’ countries have been organizing their domestic fashion industry, such as the Association of Swedish Fashion Brands, founded in 2009, and the Australian Fashion Council, founded in 2014. These organizations play a number of roles including organizing competitions providing research and resources to designers, and advocating for the economic and cultural contribution of the fashion industry.

In Canada, the Association of Canadian Couturiers was founded in 1954. The Association struggled during its short-lived existence and was ultimately shuttered in 1968 (Palmer, 2004). The Fashion Design Council of Canada (FDCC) was founded in 1999, with the key objective of creating and managing Toronto Fashion Week. In recent years, a number of additional organizations have emerged to promote the fashion industry, including the Canada Fashion Group, Fashion Group International of Toronto, the Fashion Designers Council of Quebec, and the Canadian Arts and Fashion Awards. Still, without a centralized, single membership organization to organize the fashion industry (such as the Council of Fashion Designers of America or British Fashion Council) there is no one a unified voice to represent the Canadian fashion industry.

2. 3 Garment manufacturing in Canada

While Canada is home to a domestic apparel manufacturing industry³, the sector faces a number of significant challenges related to trade liberalization, the decision of large firms to off-shore production, the rise of fast fashion, and restructuring in the fashion retail industry (Industry Canada, 2017). With approximately 20,000 people employed in the sector, GDP has decreased at an annual rate of 4.8% (\$238 million CAD) since 2011 (Industry Canada, 2017).

A key challenge facing the sector is a lack of skilled labour to work in manufacturing-related occupations (Industry Canada, 2017). While the shift towards the production of high-end products apparel for niche markets, as well as research-and-design-intensive products, are identi-

³ The North American Classification System (NAICS) code for the industry (315) – Clothing Manufacturing, includes the sub-sectors Clothing Knitting Mills, Cut and Sew Clothing Manufacturing, and Clothing Accessories and Other Clothing Manufacturing.

fied as opportunities for the Canadian apparel sector, there is a need for skilled labour to meet industry demands (Industry Canada, 2017). Recent initiatives have sought to address these issues. For example, in spring 2017 George Brown College announced a new program on sustainable fashion production and the George Brown Fashion Exchange factory in Toronto's Regent Park (Vasil, 2017). Both initiatives seek to address the challenges of manufacturing capacity, knowledge transfer, and physical infrastructure in the local industry.

2.4 The Canadian fashion retail landscape

It is also necessary to position independent fashion designers in the broader retail market. In Canada, the retail landscape has become increasingly polarized. On the one hand, luxury, high-end labels – such as Louis Vuitton, Chanel, and Jimmy Choo, as well as department stores such as Saks Fifth Avenue and Nordstrom – have been aggressively expanding into Canada (Karabus, 2015). On the other hand, discount retailers and outlet shops are commanding consumer attention, while the middle of the market is shrinking (Karabus, 2015). This is a challenge for many independent fashion designers, as they are operating in a niche segment of the market. For example, the pricing of independent fashion designer brands typically is lower than global luxury brands, but then also considerably higher than discount or fast fashion brands.

Canadian fashion firms typically fall into one of three broad categories. First, there are Canadian fashion firms that have expanded to include international retail locations, while still keeping the brand headquarters and design work in Canada. These firms may or may not manufacture in Canada. Examples include the lifestyle and leather goods brand Roots, luxury outdoor apparel brand Canada Goose, and yoga and athletic-wear brand Lululemon.

Second, there are Canadian middle or mass market labels, such as Reitmans, Joe Fresh, and Aritzia. Many of these brands offer competitive price points and operate retail locations across the country, occasionally with a smaller international footprint. Fashion firms operating in this segment have experienced difficulties in recent years, with a number of brands either closing– including Jacob in 2015–or undergoing significant restructuring, such as leather goods company Danier in 2016.

The third segment of the Canadian fashion industry is independent fashion brands. These firms have two dominant structures. Either a firm focuses on a particular product niche, such as leather goods, scarves or jewellery, or a firm operates as a 'traditional' menswear or

womenswear line offering two collections a year. Firms in this segment are markedly diverse, from luxury womenswear brand Greta Constantine, to longstanding womenswear labels Comrags and Marie Saint Pierre, to up-and-coming labels such as Sid Neigum and Beau-fille.

2.5 Regional dynamics of the Canadian fashion industry



Map 1: Regional classification of the Canadian fashion industry. Map by Zara Matheson.

Rather than focus on a particular city or group of cities, this thesis examines the fashion industry in Canada. It is important to keep in mind the sheer size of Canada, which geographically is approximately the size of Europe. In order to provide a more manageable assessment of regional dynamics within the Canadian fashion industry, the country has been divided into five major regions: West Coast (British Columbia), Prairie Provinces (Manitoba, Saskatchewan, Alberta), Ontario, Quebec, and Atlantic Canada (Newfoundland and Labrador, Prince Edward Island, Nova Scotia and New Brunswick). Within these regions, major cities have also been identified (see: Map 1). This regional classification is a modification of the regional classification from the Government of Canada. Given the population size and number of designers interviewed in Ontario and Quebec, the Central region has been separated into two regions for the purposes of this anal-

ysis. A detailed description of the characteristics of each of these regions is presented in Paper 3. Finally, studying northern Canada was outside the scope of this research, and has not be included in this analysis, but could be an area of future research.

2.6 The Canadian fashion industry in a global context

It is also necessary to briefly reflect on the position of the Canadian fashion industry in a global context. Canada's reputation for maple syrup, snow, and hockey players is perhaps more likely to resonate more than fashion. For example, Palmer (2004) begins her book on the history of the Canadian fashion industry with a quote from a British fashion journalist who remarked "What? I didn't know there was any Canadian fashion," after being invited to a Canadian fashion show in the 1980s. The fashion industry in Canada is a historically under-supported and disorganized industry, all of which makes building a long-standing brand very difficult.

However, studying a 'tier two' or 'beta' market (Rekers, 2012) that is not a global leader can still make a contribution to the literature. For example, a limitation of much of the work done on the fashion industry has traditionally focused on a select number of successful global cities. Often, it is studies of the 'big four' global cities⁴ (Breward and Gilbert, 2006) of London (McRobbie 1998; 2016), Paris (Kawamura 2004), Milan (d'Ovidio and Pradel, 2012; d'Ovidio, 2015), and New York (Rantisi, 2004) that inform our understanding of labour dynamics in the fashion industry. While studies such as these provide valuable insight into the workings of the fashion industry in each location, as Larner and Molloy (2009) argue, an empirical focus solely on global cities is likely to be 'self-sustaining and self-referential.' It is argued these cities are exceptional, rather than exemplary, of global dynamics of the fashion industry (Larner and Molloy, 2009). Indeed, a focus only on an elite group of cities does not account for the ways in which the fashion industry operates in other contexts.

Therefore, although the global fashion system is generally well studied, the specificities and attractiveness of unique and local fashion industries outside of the established centres is poorly understood. As such, the case of Canadian fashion can be situated within the body of economic geography research exploring dynamics of emerging markets, such as Sweden (Hauge, 2007), Australia (Weller, 2008), and New Zealand (Larner and Molloy, 2009). This research explores the

⁴ For example, Breward and Gilbert's (2006) edited volume on *Fashion's World Cities* does not mention Toronto, Montreal or Vancouver.

ways in which the historical evolution and economic development of the fashion industry in these markets follows a very different path than the 'big four' mentioned above. Moreover, while there has been a focus on how countries such as Sweden or New Zealand enter the globalized fashion industry, the Canadian case is an example of a national fashion industry that is much more domestically oriented.

3. Literature review

As an empirically driven thesis, the theoretical foundation for this research is not comprised of one ‘off the shelf’ theory, but rather has been informed by fieldwork and constructed from literature in the fields of economic geography, labour geography, and regional studies. This theoretical framework lays the foundation for an understanding of the nature, spaces, and dynamics of work of the fashion industry as it operates in the Canadian context. While this is a human geography thesis, literature from the field of fashion studies is also drawn upon when relevant.

3.1 A background to studying the cultural and creative industries

“Whether you like it or not, fashion is commercial. But it’s also a form of art. When you paint a picture, you have to be able to sell it” – Interview, designer.

Beginning in the late 1990s, there has been a growing body of research on the role of creative and/or cultural industries in regional and national economic growth (DCMS, 1998; Scott, 2000; Florida, 2002; Hesmondhalgh, 2005; Power, 2002; Power and Scott, 2004). The growth of academic attention to the creative industries can be attributed to the UK Department of Culture, Media and Sport 1998 report “Creative Industries Mapping.” This document defines the creative industries as, “those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property”. According to the DCMS, creative industries include: advertising, architecture, the art and antiques market, crafts, design, designer fashion, film and video, interactive leisure software, music, the performing arts, publishing, software and computer services, television and radio (DCMS, 1998). The cultural industries are defined by Power (2002, pp. 103) as: “a wide variety of commodified activities, including the mass media (print and broadcast media and advertising), film, new media, art, design, music, and architecture.”

These two examples reveal the considerable overlap between definitions of the creative industries and the cultural industries. It is common for the terms to be used interchangeably, and/or for policymakers and academics to develop their own definitions of creative and/or cultural industries (Tepper, 2002; Markusen et al., 2008). This conceptual confusion has had a particular influence on the fashion industry. The fashion industry blurs many of the boundaries of the cultural and creative industries. To some, fashion is considered a cultural industry, to others it is creative industry, and in a number of instances, it is not mentioned at all. The fashion industry can be understood as a highly artistic product imbued with symbolic and cultural meanings, and thus a cultural industry. Other reject the conceptualization of fashion as art and replace it with the idea that fashion is a business that simply produces utilitarian goods of arguably worth, thus lying outside of the cultural or creative industries altogether. The implications of these different conceptualizations are discussed in Paper 1. This thesis understands the fashion industry as a creative industry and as part of the creative economy.

In taking an economic geography approach to the fashion industry, a relevant concept is the creative economy. This literature connects the economic activities of creative and cultural workers to strategies of economic growth and development. In the early 2000s, books such as *The Creative City* by Landry (2000) and *The Rise of the Creative Class* by Florida (2002) played an influential role in broadening the conceptualization of creative industries to include creative cities, the creative economy, and the creative class. Increased academic and policy attention has been paid to the role of human creativity in spurring economic growth in economies transitioning from an industrial to post-industrial or knowledge-based economy (Florida, 2002). For example, in the context of economic challenges related to globalization, free trade, deindustrialization, and economic growth (Leslie and Rantisi, 2006), the creative economy has been identified as a pathway to building a new economic structure.

While this literature is not without controversy or considerable debate (see: Peck, 2005; Markusen, 2006), the creative economy is argued to not only be transforming the composition of the labour market engaged in particular types of work, but is also changing where people want to live (Florida, 2002; Florida et al., 2008). Economic competitiveness is seen as favouring urban areas with thick labour markets, cultural scenes, and lifestyle amenities; all of which promote interaction and innovation between and within industries (Florida, 2002; Stolarick and Florida, 2006).

However, studies of creative industries and the creative economy have produced a fragmented and uneven understanding of work within creative industries. For example, feminist scholars have argued there is a need for researchers to recognize the gender divisions within industries and to consider the intersectionality of research subjects, such as class, gender, race and other identity markers (Leslie and Catungal, 2012; Tufts and Savage, 2009; Reimer, 2009; Reimer 2016). As such, this thesis research, in part, seeks to contribute to this gap in the literature through an examination of the labour experiences of a predominantly female sample of creative workers.

3.2 The nature of work in the creative industries

“I can’t recall when it started but I’ve always wanted to be in fashion. I’ve always been very interested in fashion and developing my own collection. I had been working in retail for a few years. I worked in retail until I got what I needed from that experience. It was only a matter of time before I went out on my own”—Interview, designer.

In studying the working lives of independent fashion designers, this thesis is also situated in the labour geography literature on work in the creative industries. As a diverse range of occupations comprise various definitions of creative industries, it has been argued that studying a category such as the ‘creative class’ is too large and diverse of an analytical category for analysis (Markusen, 2006; Vinodrai, 2006). Instead, it is necessary to look within occupations in order to understand the nature and dynamics of creative work (Leslie and Brail, 2011). Therefore, this research focuses on one creative occupation: fashion design. This thesis considers a number of characteristics and consequences for those who choose to engage in this type of work.

An overarching theme in the labour geography literature that work is increasingly precarious. The International Labour Organization (ILO) defines precarious employment as, “work relations where employment security, which is considered one of the principal elements of the labour contract, is lacking. This term encompasses temporary and fixed term labour contracts, work at home and sub-contracting” (ILO, 2005 in McDowell and Christopherson, 2009, pp. 336). The study of precarious employment is often rooted in labour geography, which has emerged as a distinctive field within economic geography which seeks to “reveal the multiple geographies that underpin the everyday worlds of work and employment” (Coe and Jordhus-Lier, 2011, pp. 211). Growing political deregulation and the entrenchment of neoliberal globalization has altered the structure of employment

(Herod, 2000; Peck and Tickell, 2002), which is increasingly insecure and highly-fragmented (Lier, 2007; McDowell and Christopherson, 2009). In understanding this precarity, a key concept is risk. The nature of employment is increasingly individualized, de-standardized and characterized by risk, defined by Beck as, “a systematic way of dealing with hazards and insecurities induced and introduced by modernization itself” (1992, pp. 21). In conceptualizing risk, while much of the labour geography literature focuses on employment that is related to a firm in some way, increasingly studies recognize that creative work is often entrepreneurial (McRobbie, 2002; Reimer, 2009). Moreover, fragmentation in the nature of work for many creative workers means the boundaries between different forms of work (such as freelance work and entrepreneurship) are increasingly blurred.

As entrepreneurs starting new businesses, risk and precarity for independent fashion designers is defined by a number of characteristics. For example, one key characteristic is the need to constantly balancing both the business and creative aspects of creative work (Hracs, 2010). In many instances, these competing demands are placed upon one person, who is the sole employee of the business. This can be a challenge, as Eikhof and Haunschild’s (2006) case study of ‘bohemian entrepreneurs’ demonstrates, because creative workers are often driven by intrinsic motivations, which can be at odds with the economic need for self-management and business savvy. This tension is described by Bain and MacLean (2013, pp. 97) as, “negotiating a schizophrenic consciousness.” Moreover, the demands of running a small business are often all-consuming. One consequence of the new pace and structure of work is the ‘extensification of work’ across divergent spaces, scales, and times (Jarvis and Pratt, 2006). Work increasingly bleeds into other aspects of life such as demands to attend ‘voluntary’ activities like professional networking events. These events are described as being important for ‘staying in the loop’ in order to find the next job or income-generating opportunity (Vinorai, 2006).

In critically analyzing labour and entrepreneurial dynamics in the creative economy, the economic geography literature on gender and entrepreneurship is highly useful (see: Blake and Hanson, 2005; Ekinsmyth, 2011; 2013; Hanson, 2009; Jones, 2012). Masculinist conceptualizations of innovation and entrepreneurship often dismiss women’s businesses as low growth with few technological advances or export capabilities (Blake and Hanson, 2005; Gupta et al., 2009). This is because, “entrepreneurial personality traits are discursively formulated as antithetical to femininity” (Ekinsmyth, 2013, pp. 4). However, as Blake and Hanson (2005, pp. 697) argue, “recognizing

that innovations can occur in any place and in any economic sector should mean recognizing that innovators come in various forms of embodiment.” This is a key theme that is addressed in more detail in Paper 2.

Given these precarious working conditions, why do individuals embark on a career as an independent creative worker? One explanation lies in the emotional attachment and commitment many have to their work. For example, work in the fashion industry is often connected to personal identity. It is argued that autonomy, creativity and excitement attracts individuals to these jobs, who are often willing to overlook high levels of employment risk (Neff et al., 2005). Arvidsson et al.’s (2010) case study of the Milan fashion industry found that employees generally express very high levels of work satisfaction rates, despite their ‘dire’ working conditions. While their day-to-day working lives were comprised more of routine-oriented, rather than creative tasks, workers negotiated opportunities for self-expression and self-actualization that were perceived to come with the identity of working in fashion (Arvidsson et al., 2010). McRobbie (2002) reported similar findings in the UK, where female workers in fashion emphasize the desire to find happiness at work. Hesmondhalgh and Baker (2010) describe this as the blurring of ‘pleasure and obligation.’

Without traditional forms of job security and/or formal employment structures, the new geography of work is uneven across space (Herod, 2003; Herod et al., 2007). This thesis also examines changes to the locational choice decisions and mobility patterns of independent fashion designers.

3.3 Locational choice, regional dynamics and mobility patterns of creative workers

“I like my town but it’s hard to say where I will be in five years. I am open to moving. If I did, I think it would be to Vancouver, or, I’d love to live in Europe again...” – Interview, designer.

The creative economy has not only changed the nature of work, but has altered the spatial distribution of life and work (Scott, 2006). This thesis is interested understanding the locational choice decisions of independent fashion designers within the Canadian fashion system. As such, the literature on the locational preferences of creative workers, as well as the literature on mobility and geographic proximity will be presented here.

As creative industries have been found to play an increasing role in urban economic development (Florida, 2002; Power, 2002) policy and academic attention has focused on how cities and regions can attract and retain creative workers. It is argued the world is not flat, but rather is ‘spiky’, with highly-mobile and talented choosing to co-locate in certain places (Florida, 2002; Florida, 2005). While urban areas have traditionally been the focus of this research, more recently, scholars have highlighted the appeal of smaller cities, suburbs, and rural areas for creative workers (see: Bell and Jayne, 2009; Denis-Jacob, 2012; Hracs, 2009; Hracs et al., 2011; Lorentzen, 2013; Waitt and Gibson, 2009).

The locational preferences of creative workers are understood to favour places that are diverse, walkable, with low barriers to entry, a thick labour market, and a wide range of lifestyle amenities (Jacobs, 1969; Clark et al., 2002; Florida, 2002; Florida et al., 2008). At times, this literature presents a general account of creative workers. However, it is argued that the locational preferences of creative workers not only vary by occupation but are highly individualized (Leslie and Brail, 2011). Moreover, this literature on talent attraction and retention typically focuses on locational choice in terms of ‘one-off’ moves, and as such, only tells part of the story about the nature of mobility for creative workers. In an era of new technologies, developments in communications, new intermediaries and curators, and the declining cost of travel, it is important to reconsider not only the locational choice decisions of creative workers, but also the new forms of mobility at their disposal. The ‘new mobilities paradigm’ conceptualized by Sheller and Urry (2006) includes both physical and virtual movement of people and knowledge (see also: Cresswell 2010; Milbourne and Kitchen 2014). This thesis is interested in how independent creative workers strategically harness different forms of mobility.

One type of mobility in the fashion industry is cyclical or temporary mobility for fashion week, when designers relocate to a certain city once or twice a year, in order to be a part of this field-configuring event (Lampel and Meyer, 2008). Fashion weeks are large-scale, bi-annual showcases that follow a global and hierarchical calendar that have long played a key role in shaping the schedule and timescales that define the industry (Agin, 1999; Entwistle and Rocamora, 2006; Weller, 2008). Presenting a collection at an event such as fashion week creates media attention and buzz, while also securing status for a brand. As Jansson and Power describe, “positive connections between product images and place may create a kind of monopoly rent and therein can create barriers to entry for products from competing plac-

es; and give firms an incentive for being in the ‘right’ place” (2010, pp. 892). However, it has been argued that the role of temporary events and networks in the context of the creative industries continue to be poorly understood (Comunian, 2016).

Second, this research also examines the role of cultural intermediaries in shaping the places of work for independent creative workers. Cultural intermediaries, such as gatekeepers or curators, are a growing force in the cultural and creative industries (Foster et al., 2011; Hracs, 2015). Intermediaries play a number of roles, such as selecting, identifying, displaying, and promoting particular goods and services (Foster et al., 2011; Hracs, 2015; Joosse and Hracs, 2015). Intermediaries in an industry such as fashion can take the form of public relations firms, brand consultants, bloggers and others related to the fashion industry. As Vinorai (2015) argues, labour market intermediaries (in the case of design work, professional membership associations) play a key role in creative industries through working to secure the status and position the creative workers they represent. This thesis is interested in exploring the ways in which intermediaries may influence the locational choices of creative workers and facilitate new forms of mobility. A growing role for intermediaries is also a reflection of the ways in which independent creative workers are increasingly going beyond the ‘do it yourself’ (DIY) model, and rather are harnessing the expertise and skills of others (Hracs, 2015).

Third, there is a need to consider the role of virtual spaces and the implications of new technologies on the role of physical proximity. The need for geographic or face-to-face proximity has not necessarily been replaced, but rather, new technologies have provided an additional avenue to engage in key functions, such as knowledge exchange (Torre, 2008). As Crewe (2013b, pp. 761) argues, “the Internet is far more than a technology: it transforms the way we connect to the world and understand it.” In understanding the “independent turn,” Shultz (2015) examines the enabling power of social media and digital technology, which not only serve as platforms for individual creators to market their products and connect with consumers, but also provide a way in which individuals can bypass traditional intermediaries who previously could have stalled their access to market. Given the pace of change in the fashion industry, and creative economy more broadly, there is a need to explore the spatial dynamics that define the nature of work.

3.4 Global and local production networks in the fashion industry

“It is important to us to manufacture in Canada. There’s a sense that we are creating something here for the long term. There are manufacturing facilities that are in line with what we want to do. We are making beautiful products and we are happy with it” – Interview, designer.

This section will provide an overview of the production processes that have shaped the geography of the global fashion industry, and in turn, will argue that local production networks provide an opportunity for independent producers to offer an alternative in a competitive marketplace. The contemporary fashion industry is in the midst of significant restructuring and transformation. From the intensification of ‘fast fashion,’ the increasing ubiquity of social media and online shopping, and shifts toward local, sustainable or ‘slow fashion,’ the nature of production, consumption, and intermediation is in flux (Crewe 2017). Here, production processes have become increasingly important and controversial in the fashion industry.

The fashion industry is an “exemplifier of globalization” (Kalantaridis, 1996) at the vanguard of many key issues facing the global economy, such as environmental sustainability, corporate social responsibility, and worker safety. Global production networks have come to define the way much of the world’s fashion is produced. Coe et al. (2008a: 272-274) define a global production network as “one whose interconnected nodes and links extend spatially across national boundaries and, in so doing, integrates parts of disparate national and subnational territories”. This field has evolved from global commodity chains, which conceptualized the increasingly global range of activities and actors involved in the design, production and marketing of a product (Gereffi and Korzeniewicz, 1994), and research on global value chains (GVC), which emphasizes strategies for value generation at each stage of the chain for commodities, manufacturing, and services (Gereffi et al., 2005). The third evolution of this field is the global production network (GPN) framework developed by the Manchester school (Coe et al., 2004; Henderson et al., 2002).

In the 20th century, several key developments facilitated the global production networks that transformed the fashion industry, including new supply chain management systems, the outsourcing of production, and lean retailing (Abernathy et al., 1999; Agins, 1999; Bhardwaj and Fairhurst, 2010; Pickles et al., 2015; Reinach 2005; Taplin, 2014; Tokatli, 2008; Tyler, Heeley and Bhamra, 2006). The system of clothing these global production networks produce is known as fast fash-

ion, and is typified by firms such as H&M, Mango, and Zara. ‘Fast fashion’ is a catchall term for international firms that favour flexible, efficient supply chains in order to produce trendy clothing at the lowest price (Reinach, 2005).

While at opposite price points, both fast fashion firms and global luxury brands have increasingly diversified garment manufacturing locations. For example, Prada – once a staunch supporter of made in Italy – now produces in a host of countries including China, Turkey, Vietnam and Romania (Tokatli 2014). Firms may choose to brand themselves with the ‘mythological aspects’ of a particular place – like Italy’s reputation for quality or Sweden’s reputation for cool – in their branding (Hauge, 2007; Ostberg, 2011) while concealing where the clothing is really made. These changes had a devastating impact on the apparel manufacturing in North America. For example, in 1990, 50% of clothing sold in the USA was made in the USA (Cline, 2013). Today, that figure is approximately 2% (Cline, 2013).

However, it is increasingly difficult to overlook the economic, social, political and environmental consequences of this unsustainable mode of production. The 2013 Rana Plaza Factory collapse killed over 1,129 garment factory workers who were manufacturing for a number of well-known Canadian, American, and British fast fashion giants (Manik and Yardley, 2013). After China, Bangladesh is the world’s second-largest garment producer and exporter, with companies flocking to the country in recent years as a solution to rising labour costs in other countries (Manik and Yardley, 2013). Following the tragedy, minimal progress has been made to improve conditions for workers and the environment with reports suggesting many firms continue to produce in Bangladesh with impunity (ILO, 2015). Basic safety measures, such as renovations to ensure door locks do not trap workers in a factory, continue to run behind schedule (Butler, 2016).

While some firms try distance to themselves from the negative associations of the place where their clothing is being manufactured (for example, it is increasingly common to see two labels on a garment: one stating ‘designed in’ and one stating ‘made in’) others have chosen to put quality and accountability at the core of their brands. Similar to the ‘slow food’ movement, characterized by an emphasis on supporting local, small scale farmers and cooking with seasonal ingredients (Parkins and Craig, 2009), slow fashion has become a growing movement in the fashion industry (Clark, 2008; Fletcher, 2010). Fletcher (2007) defined slow fashion as, “about designing, producing, consuming and living better. Slow fashion is not time-based but quality-based (which has some time components). Slow is not the opposite

of fast – there is no dualism – but a different approach in which designers, buyers, retailers and consumers are more aware of the impacts of products on workers, communities and ecosystems”. Related movements include craft production (Jakob, 2013), heritage brands (Crewe, 2013a), up-cycling and/or smart textile fashion (Ainamo, 2014), and ethical consumption (Joergens, 2006).

Whether it is termed slow, ethical, sustainable, green or eco fashion, little is still known about the way in which firms put these principles into practice. Just as the global production network framework helps us to understand the actors and linkages connecting globalized firms, a local production networks framework can be utilized to explore processes behind local fashion production. Simmie and Hart define local production networks as, “collaborative linkages between local firms and local factors of production” (1999, pp. 445), whereby firms rely on local resources ‘of various kinds’ to innovate and compete both locally and abroad. This framework provides a way in which to theorize how actors can adapt their firm structure in order to capitalize on local social capital, knowledge, and resources. An understanding of the implementation of local production networks will be combined with the global production networks approach that examines the stages of production, distribution and consumption, and applied to the Canadian case.

This thesis explores the ways in which local production networks can be utilized in value creation strategies, such as those based on quality (Jansson and Waxell, 2011) and differentiation (Power, 2010). In the fashion industry, ‘value’ can mean many different things. Value can also be related to the symbolic value of a product, such as the social distinction and status that a particular brand label confers on the wearer (Veblen, 1899; Bourdieu, 1984). Value can also be about the beliefs and ethos that independent producers embed in an item, making it special, exclusive or unique (Hracs et al., 2013). Or, ‘good value’ can be understood as being able to purchase the most amount of product for the least amount of money. In a marketplace that is characterized by “infinite choice and intense competition” (Hracs et al., 2013, pp.1144), independent producers must find a way to “stand out in the crowd.” Rather than engaging in a race to the bottom and imitating the strategies of international firms that rely on global production networks to produce clothing at lower and lower costs, this thesis explores the ways in which independent fashion designers have chosen to work locally and create a high-quality, unique product that can serve as an alternative in the marketplace.

4. Methodology

This chapter provides an overview of the methodological design of this thesis project and reflections on the experience of carrying out this research. Case studies rely on the triangulation of multiple sources of data and multiple variables of interest (Yin, 2009). This thesis utilized semi-structured interviews, observation (both in physical and virtual spaces), and policy document analysis.

4.1 Epistemology: Qualitative research and the research process

While in the field, geographers have long utilized a wide range of methods and approaches (Dwyer and Limb, 2001). This research follows the cultural turn in economic geography, which sought to ‘study the economic as cultural formation’ (Thrift, 2000). Beginning in the 1980s, epistemological and thematic shifts occurred in economic geography, including a turn to qualitative research, the growing influence of fields such as cultural studies and feminist geography, and thematically, a growing recognition of the impact of cultural factors in industrial competitiveness, regional economic growth, and locational decisions (Aoyama et. al, 2011). Economic geography has evolved into a critical social science that has shifted increasingly from a focus on the global to the local, and the intersection between the two (James, 2006).

Qualitative approaches have “enabled the study of, and emphasized the importance of, seeing economic activity as a set of lived practices, assumptions and codes of behaviour” (Crang, 2002, pp. 648). The decision to employ a qualitative research methodology is also indicative of a particular epistemology. Like many other qualitative researchers, I follow the work of Dwyer and Limb (2001, pp, 8) who argue:

“A philosophical starting point for researchers using qualitative methodologies is that knowledge is situated and partial. This view of knowledge is based upon a recognition of the social world as something that is not fixed or easily known, but that is made up of competing social constructions, representations and performances.”

In doing so, I take a social constructivist approach (Berger and Luckman, 1966) that seeks to understand the lived experiences, meanings, and realities of research subjects, in recognition of the fact that the construction of knowledge is socially-embedded and created through interactions.

4.2 Positionality

As a researcher, it is necessary to reflect on who you are and how your identity – such as race, class, gender, nationality, political views etc. – can play a role in shaping interactions in the field throughout the research process (Mohammad, 2001). A researcher must be aware of their self-positioning and subjectivity as much as possible throughout the research process, as well as the broader societal context that any research methods are operating within (Silverman, 2001). As a female researcher in my twenties, I recognize that a number of factors play a role in shaping my interaction with designers and key informants and must be negotiated in the ‘relational moment’ of the interview (Valentine 2005). For example, in some instances, being close in age to an interviewee helped to establish rapport and ease in an interview, while in interviews with key informants, it was necessary to take a more formal tone.

In addition to a researcher’s positionality impacting data collection and findings, Schiellerup (2008) also argues that the social context influences the research process and the narratives that flow from data. Reflections on the social context of data collection include my status as an insider/outsider, which impacted the depth and breadth of my research methodology. Mohammad (2001), describes insider/outsider status as relating to boundary markers, such as identity, social position, and belonging. I began this research as an outsider with no experience in the fashion industry. This position became more fluid during the course of fieldwork, as I had the opportunity to attend a number of fashion-related events in Toronto and London with a gatekeeper and others from the Canadian fashion industry. Attending these various events provided the opportunity to gain insider knowledge into the industry but as a relative outsider and researcher.

4.3 Interviews as a research method

Interviews are the primary source of data for this thesis. This section will provide an overview of the role of interviews in qualitative research and my experiences in the field. Elyes (1988, in Valentine,

2005, pp. 111) describes interviews as, “a conversation with a purpose,” while Clark (1998) describes in-depth interviews as “close dialogues.” Close dialogue is described as, “a means of understanding better the actual practice of decision making...the deep texture of local circumstances” (Clark, 1998, pp. 82). The advantages of interviews are wide-ranging, from providing the opportunity to engage in a flowing discussion that may take unexpected turns and uncover new research themes, to allowing interviewees to reflect upon the topics under examination in an in-depth manner (Valentine, 2005). As I was interested in gaining insight into the lived experiences of independent fashion designers, there is arguably no better way to develop this understanding than through interviewing and talking with designers themselves. The purpose of interviews is not to be representative of the population as a whole, but rather to understand how the individuals you wish to study experience and interact with the world around them, creating a rich description of an individuals’ experience about a particular event or phenomenon (Valentine, 2005).

For the Canadian case study, 87 interviews were conducted between January 2014 and December 2016: 54 with independent designers and 33 with key informants from the broader fashion sector (such as fashion buyers, employees of public relations firms/agents, fashion week executives, educators, and policy makers). While this thesis focuses on the perspective of independent fashion designers, it was also important to gauge a wide range of views from key players in the industry to provide contextual background. This was also part of a strategy to balance the study of the social structures that organize the industry, with the study of individual experiences (Winchester, 2005). Moreover, a wide range of informants was necessary in order to triangulate findings and avoid one-sided conclusions and understand the complexities of the industry (Silverman, 2010; Valentine, 2005; Yin, 2009).

4.4 Working with a gatekeeper

A key challenge when conducting qualitative research is recruitment of participants and gaining access to the community and informants you wish to interview (Valentine, 2005). Recognizing this challenge, I had a number of ‘backup’ plans or alternatives for my project if it did not go as planned, such as changing the geography from the national level to a particular province, region, or city. However, largely through a key gatekeeper, I was able to interview a wide range of

individuals and keep the geographic focus of my thesis at the national level.

Gatekeepers are defined as those “individuals in an organization that have the power to grant or withhold access to people or situations for the purposes of research’ (Burguess, 1984, pp. 48 in Valentine, 2005, pp. 116). Gatekeepers play a key role in providing access to “key resources needed to do research, be those resources logistical, human, institutional or informal” (Campbell et al., 2006, pp. 98). Despite their potential role as a vital resource in conducting qualitative research, Campbell et al. (2006) argue that there has been limited study and recognition of gatekeepers in geography. This section will emphasize the importance gatekeepers can play as a crucial source of access, information, and support during the research process. I will describe how I established a connection with my gatekeeper, the role of my gatekeeper in providing connections for interviews and observation, and how this relationship evolved over time.

I initially made contact with my gatekeeper in January 2014, when I requested an interview while preparing for my first fieldwork trip to Canada, which was timed to take place during Toronto Fashion Week. I began by contacting well-known fashion designers, who would be showing during fashion week, as well as key informants I thought may also attend these events. This gatekeeper, who had a long-standing career in the Canadian fashion industry, not only agreed to an interview, but invited me to accompany her to Toronto Fashion Week. My gatekeeper provided access to the industry in terms of providing multiple introductions to fashion designers and key informants, as well as providing access to industry events. Working with a gatekeeper ultimately increased the number of interviews I completed. In particular, well-known designers would have also been much more difficult to access without the help of my gatekeeper (indeed, in some instances, I had contacted a designer and was unable to schedule an interview on my own, and then would be able to schedule an interview after a gatekeeper introduction). Key informants were nearly impossible to access without a gatekeeper, as many receive interview requests regularly and are selective in whom they choose to speak to. In a number of instances, the contact information for key informants was not publically available, which would have made accessing them on my own extremely difficult.

Relationships with gatekeepers are complex and evolving, with unexpected implications for research (Campbell et al., 2006). As Clark (1998, pp. 73) describes, “unlike other forms of empirical research,

close dialogue relies upon the intimacy or closeness of researchers to industry respondents, a level of personal commitment quite at odds with the conventional notions of scientific disassociation and objectivity.” Indeed, personal relationships play an important part of shaping research and our understanding of the subject at hand. When I first met my gatekeeper, she described her previous successes in the industry, and that her next endeavour was to improve the policy landscape for fashion in Canada. She described working for the past several years on this issue with minimal success, and felt that research on the subject was a missing part of the puzzle. This no doubt informed her decision to meet with me on multiple occasions and provide support for my research. However, just as she was clear about her ‘agenda’ and motivations for supporting my research, I was upfront with my gatekeeper that the priority for this research was academic and maintained autonomy over the objectives and research questions that drove this thesis. This was a careful balance that was maintained throughout the research process.

A lack of policy support for the industry was also one of the most prominent and consistent themes from interviews with designers. While in the field, it became evident this research could also have policy relevance. To this end, I have worked with my gatekeeper in a number of initiatives, such as supporting the submission of policy proposals on behalf of the fashion industry to cultural policy reviews that had been initiated by the Ontario Ministry of Culture, Tourism, and Sport, and the Canadian Ministry of Culture and Heritage. Given the lack of research on the industry, my involvement took the form of preparing research briefings on the state of the fashion industry. This involvement is an example of ‘grey geography’ (Peck, 1999). I agree with Peck (1999, pp. 131) who argues that, “policy research is a legitimate, non-trivial and potentially creative aspect of the work of academic geographers, but one that we are currently neglecting and/or under-valuing.” I believe that geographers can balance our own need for academic research, while still considering the policy relevance of our work. Lending support to policy initiatives was a key way I felt I could give back, not only to my gatekeeper, but to my respondents as well.

4.5 Conducting interviews

When conducting interviews, a number of factors must be taken into account. As Valentine (2005) describes, the setting for an interview can influence the interview. The majority of interviews took place in public spaces, such as cafes or restaurants, or in the shop or studio of a

designer or office of a key informant. For some subjects, such as officials from educational or other formal institutions, the interview would take place in their office. The benefits would be that it would be quiet, private, and often without disruptions, but this also produces a more formal atmosphere that may be stilted (Valentine, 2005). Public spaces like cafes may be noisy and impact recording quality, but can also be more casual and informal, which can make an interviewee feel more comfortable. Interviews in a designer's studio had the benefit of being able to experience this environment (for example, if the studio was a live-work space, or if manufacturing was taken place) as well as see the latest collections of a designer.

With respect to the ethical considerations of conducting interviews, all interviewees are confidential and treated as anonymous in all texts. Interviews were recorded when possible (Valentine, 2005), transcribed verbatim, and then coded according to theme (Cope, 2005). In order to compensate for potential limitations in recording quality, as well as when an interview was not recorded, detailed notes were written down during interviews and also transcribed afterwards.

Fieldwork in Toronto, Canada was timed strategically in March and October 2014 to coincide with Toronto Fashion Week. Fashion designers and key players in the Canadian fashion industry are often in Toronto during this time, which allowed for interviews and/or introductions to take place in person. Even if an interview could ultimately not be scheduled during Toronto Fashion Week, the face-to-face introduction proved beneficial when following up to conduct an interview via Skype. Interviews also took place in person during travel to Canada for conferences and/or personal holidays. Overall, the interview process benefitted from several periods of intensive fieldwork, as this allowed time for reflection and refinement of the interview guide.

When it was not possible to meet in person, interviews took place via Skype. Conducting interviews via Skype also allowed for flexibility in terms of scheduling a time for an interview. For example, on more than one occasion, a designer would cancel the interview last minute due to another commitment or forget about the interview altogether. The 'cost' in terms of travel or scheduling is quite low when conducting an interview via Skype, and allowed for interviews to be rescheduled and ultimately completed. Skype also allowed considerable geographic distances to be overcome (see: Grabher and Ibert, 2014). For example, it would be cost prohibitive to travel from Uppsala to Vancouver or Calgary for a relatively small number of interviews, especially in the event of a last-minute cancellation or scheduling conflict. Moreover, it was often quite difficult to predict where a

designer would be. As Paper 3 explores, even though a designer may be based in a particular city, many travelled quite often, making it was difficult to predict where a designer would be. Ultimately, conducting interviews over Skype allowed for a larger number of interviews with independent designers and key informants to be completed, and from a wider geography.

Regardless of location, an interview guide was utilized to promote consistency and prompt discussion (Valentine 2005). Following the advice of Valentine (2005), the interview guide began with shorter, straightforward questions to help the interviewee 'warm up' and establish rapport. The bulk of the interview questions explored the designer's background and motivation for entering the fashion industry, their design and decision-making process, and their experiences in the fashion industry more broadly, while interviews with key informants focused on their industry experience. Many of the interviewees were interested in telling their story and it was often my role to only gently guide the discussion to make sure all points were covered. Again, following the advice of Valentine (2005), the interview often ended with some more relaxed questions to 'warm down' after the interview. This was often a question about where the designer saw the business going in five or ten years. In a number of instances, a follow-up interview or an informal meeting took place 1-2 years after the initial interview to see how the trajectory of their business had evolved.

In a few instances, interviews were conducted over email. This would consist of a shortened interview guide that was sent to a participant to answer at their convenience. Emailed answers, while less-detailed than an interview, still provided the opportunity to gain valuable insight from a designer. Interviews over email were often conducted with designers who were often difficult to access, either because their businesses were very small and the designer could not find the time to schedule a full interview, or their businesses were very large and the designer refused to schedule a full interview. Finally, feminist researchers (see: Valentine, 2005) have argued the researcher should emphasize interaction with the participants and the sharing of information. This took place in a couple of ways during interviews. For example, if the designer was in a location where I had learned about a pop-up shop, market, fashion week or design competition, I would mention it during the closing moments of the interview and provide that information in a follow-up/thank you email.

4.6 Sampling

Rather than seeking to employ a random sampling technique, designers and key informants were selected for interviews with the intention of developing an illustrative sample (Valentine, 2005). The objective was not to be statically representative, but rather identify and interview designers from across the country who run different types of businesses and have been in the fashion industry for different periods of time. Access to designers and key informants was granted in one of three ways: personal email (introducing myself and the project without previous contact), introduction from my gatekeeper (either via email or in person), or snowball sampling.

In developing my sample, it was necessary first to understand the composition of the Canadian fashion industry and determine who it was that I wanted to talk to. I chose to focus on independent fashion designers, as I am interested in entrepreneurs and small businesses, rather than designers who work for larger design businesses. Moreover, the majority of design businesses in Canada are small businesses of less than eight people (Statistics Canada, 2013), so choosing to study independent fashion designers is also representative of the dominant industry structure. Independent fashion designers were identified from a number of sources, including media articles and blog posts, designer rosters from fashion weeks, Google searches, and through a gatekeeper and key informants. While interviewees often were located in one of the major cities of Toronto, Montreal and Vancouver, this research also sought to interview designers from smaller cities, such as Edmonton, Regina, Winnipeg, St. John's, and Fredericton. Organizing fieldwork over several time periods also provided the opportunity to monitor the industry and geographic representation of my sample, and to target particular segments of the industry that were underrepresented.

Snowball sampling, defined as "using one contact to help you recruit another contact, who in turn can put you in touch with someone else," was also employed (Valentine, 2005, pp. 117). A danger of snowball sampling can be that if you recruit only from the snowball sample, you run the risk of having a narrow sample of likeminded or related individuals. However, using this sampling technique in combination with the other methods proved beneficial, particularly in smaller cities and regions. At the end of an interview, I would ask a designer if they could suggest other designers in their city that I could contact. In smaller places, designers often knew each other and would provide a personal email address or personal introduction to the designer, which further facilitated access.

When developing the criteria for inclusion in the sample for independent fashion designers, the following characteristics were considered. First, the fashion design business should be based in Canada. The designer did not need to be Canadian, but rather the business should be located in Canada. One interviewee (who was interviewed while showing a collection in Toronto) was actually based in London, England. Given that a number of other designers often reflected on whether or not to keep their business in Canada, this interview provided a glimpse into the challenges and opportunities a designer may experience abroad. An additional criterion was that the fashion label had to be independent, and could be from any segment of the fashion industry. For example, accessories (such as leather goods, scarves, or sunglasses or jewellery) were also included. Finally, while the majority of interviewees manufactured locally, the product(s) did not have to be made in Canada in order to be included in the sample. Based on these criteria, Table 3 provides an overview of the demographic and other characteristics of independent fashion designers who were interviewed.

Table 3: Demographic characteristics of independent fashion designers sampled

Characteristic	Variables	Number
Gender		
	Female	45
	Male	9
Years in business		
	Less than 2 years	6
	2 to 5 years	28
	5 to 10 years	12
	More than 10 years	8

Education in fashion?		
	Completed <i>fashion-related</i> post-secondary education	30
	Completed post-secondary education <i>unrelated</i> to fashion	12
	Completed non-fashion related post-secondary education <i>then</i> an education in fashion	11
	No post-secondary education	1
Location		
	Western Canada (Vancouver, Victoria, Vancouver Island)	4
	Western Canada (Edmonton, Calgary, Regina, Saskatoon, Winnipeg)	12
	Ontario (Toronto, Ottawa, Mississauga, Brampton)	25
	Quebec (Montreal)	5
	Atlantic Canada (Fredericton, Halifax, St. John's)	7
	Other (London, England)	1
Made in Canada?	Exclusively made in Canada	46
	All products made outside of Canada	4
	Combination of domestic + international manufacturing	4

With respect to gender, 45 designers (83%) were female, while 9 designers (17%) were male. When compared to the 2011 National Household Survey (NHS) category of “theatre, fashion, exhibit and other creative

designers,” this sample of designers has a larger share of female designers, as the NHS reported a gender division of 74% female and 26% male. However, it is important to keep in mind that the NHS category includes other types of designers in their definition, which may have a higher share of male workers than the fashion industry.

With respect to the age of the fashion design businesses in the sample, more than half of designers had been running their current business for less than five years at the time of being interviewed. There are a number of factors that may explain this distribution. Newer designers are often the designers who are attracting and creating buzz around their label (for example, through having an immensely popular item or through winning a design competition), which means they may have been more identifiable when developing a list of designers to contact for interviews.

However, this most likely also reflects the difficulty of building a long-term career as a fashion designer in Canada and being able to stay in business for more than five years. Interviews revealed a great deal of uncertainty amongst the designers about the future of their business. Of those who had been in business for more than ten years, two stand out. One business, based in Quebec, was founded in 1957, while another business, based in Toronto, has been in operation since 1983. It is quite difficult to find independent fashion design businesses in Canada that have managed to stay in business for this amount of time. The difficulties of building and growing a fashion design business in Canada is a theme that is consistent across the thesis papers. The relative newness of the majority of the interviewees also provides the potential for longitudinal research that traces the evolution of these businesses over time.

Interviews also explored the educational experience of independent fashion designers. The 2011 NHS category of “theatre, fashion, exhibit and other creative designers” reported 87% of respondents held some form of post-secondary education. Of the sample of designers interviewed, just over half of designers had attended either college or university for fashion design, with an additional 20% of designers attending a fashion design program after completing their initial degree. While few designers in this category initially completed a degree in a related field, such as fine arts, the majority of respondents had instead taken their initial degree in an entirely unrelated field, such as engineering or commerce, before deciding to go back to school for fashion. Nearly a quarter of all respondents had no previous fashion design education before starting their label. The various paths to becoming a fashion designer in Canada are the subject of Paper 2.

With respect to the location of designers in the sample, nearly half of the respondents were based in Ontario. According to the Canada Business Patterns (Statistics Canada, 2013), of the total number of businesses in the category “Other Specialized Design Services”, 31% of all businesses are based in Toronto, compared to 14% in Montreal and 16% in Vancouver. The high concentration of design businesses in Toronto contributed to this region’s overrepresentation in the sample. Toronto is home to a number of key actors in the fashion industry, such as the buyers for large department stores, as well as individuals working in public relations and consulting (such as those who represent prominent designers), and those involved in fashion weeks and fashion-related events, which can also encourage designers to move to this city. It should also be kept in mind that designers from other Ontario cities, such as Brampton, Mississauga and Ottawa, were also interviewed.

While location within Canada no doubt impacts the careers and day-to-day lives of independent fashion designers in Canada, it is also important to keep in mind that designers are highly mobile. As Paper 3 discusses, independent fashion designers are engaged in business activities in a variety of places to strengthen and grow their businesses, such as working in other parts of the country for fixed amounts of time (such as for fashion week or working with manufacturers), as well as partnering with public relations firms or agents to represent their label outside of their hometown. This data reflects the location of a designer’s business at the time they were interviewed. A number of designers relocated their business during the course of fieldwork (which began in early 2014). For example, a designer who was based in Vancouver Island at the time of the interview in 2014 relocated to Montreal in 2016, while a Toronto designer had recently moved to Montreal at the time of the interview in late 2014 and has since moved back to Toronto.

The final characteristic included in the study is whether or not a designer manufactured their clothing in Canada. The majority of designers interviewed manufactured their collection solely in Canada, while four designers manufactured exclusively outside of Canada, and another four used a combination of domestic and international manufacturing. This finding was the starting point for Paper 4, examining the opportunities and challenges of made in Canada.

The initial criteria for inclusion in the sample for key informants was much broader. As I was unsure at the start of this project of the response rate I would ultimately have, I made the decision to sample broadly when identifying key informants. The following segments of

the fashion industry were considered. First, from the field of education, department heads from fashion schools in Canada, as well as academics (from university business studies, geography and history departments, as well as institutions (such as the Royal Ontario Museum) studying different aspects of the Canadian fashion industry. Second, from the fashion industry, individuals working in a variety of roles such as managing fashion weeks, public relations firms, brand consultants, and stylists, were interviewed. Third, the journalists from major newspapers, magazines, and bloggers were recruited, and finally, from retail, buyers from independent fashion retailers, department stores and pop-up shops were included.

The following provides an overview of the demographic and other characteristics of key informants who were interviewed (see: Table 4).

Table 4: Demographic characteristics of key informants sampled

Characteristic	Variables	Number
Gender		
	Female	21
	Male	12
Location		
	Western Canada (Vancouver)	1
	Central Canada	0
	Ontario (Toronto)	30
	Quebec (Montreal)	2
	Atlantic Canada	0
Industry segment		
	Education – fashion programs	2
	Education – research (universities and museums)	4

	Buyer	6
	Stylist	1
	Fashion week	5
	Fashion events (not fashion week)	4
	Public relations, designer agents and/or consulting	9
	Government	2

While the majority of independent fashion designers interviewed were female, more men were interviewed in the key informant sample. This may reflect the observation that some of the male key informants were in occupations that are more male-dominated, such as consulting and academia. This sample of key informants includes a variety of industry segments comprising different aspects of the fashion industry and related sectors. For example, educators included department heads for two different fashion programs – one at the college level and one at the university level – as well as a historian. Senior buyers from the two largest department stores in Canada were interviewed, as well as buyers for smaller, independent fashion retailers. Only one stylist was interviewed, however this person had over twenty years’ experience in the Canadian fashion industry, and had worked a variety of sectors over her career, including local and national newspapers, magazines, film, and TV. Key informants involved in events outside of fashion week included those running pop-up shops, industry events such as award shows, and networking events.

4.7 Conducting participant observation

This section will provide an overview of the rationale guiding the observation and participant observation that took place during my fieldwork, and the practicalities of conducting this fieldwork. The data collected during participant observation provided important first-hand knowledge into the workings of the fashion industry several times during the course of my fieldwork. It also provided the opportunity to build connections I could rely on over the course of the research process. Participant observation is described by Cook (2005, pp. 167-168) as:

“researchers moving between participating in a community – by deliberately immersing themselves into its everyday rhythms and routines, developing relationships with people who can show and tell them what is ‘going on’ there, and writing accounts of how these relationships developed and what was learned from them – and observing a community, but sitting back and watching activities which unfold in front of their eyes.”

Observation and participant observation ultimately became a very important part of this research. As designers described spending much of their time working in isolation, it could be easy to forget they are a part of a broader fashion system and community. Participant observation was crucial in placing independent fashion designers back into their wider context of the Canadian fashion industry.

Participant observation took place in three main ways: industry events, shops, and online. First, participant observation took place during Toronto Fashion Week in March and October 2014. Fashion week is a key field configuring event of the fashion industry and is the physical manifestation of the different components of the industry coming together in one place. I deliberately chose this time, as I knew this event brings designers and key informants to the city, which I hoped would increase my likelihood of meeting and interviewing them. While this was indeed the case, I was then also able to add observation and participant observation to my fieldwork in a substantial way with the help of my gatekeeper. In total, during this time, I attended twenty fashion shows and related industry events.

When developing a research design that includes participant observation, Cook (2005) states there are three primary considerations: a researcher’s ability or inability to access the community they want to study, the role the researcher will have to take on in the community, and the kind of data you can construct while in the field. First, in order to gain access to fashion week events, my strategy was to attend public events individually and private events with my gatekeeper. Purchasing general admission tickets to Toronto Fashion Week allowed me to view the shows as a member of the general public. I also attended related events such as an exhibit at the Toronto Design Exchange and designer showcase at the Toronto Eaton Centre. I was not active in introducing myself as a researcher to designers or key informants during this time.

I also gained access to fashion week events through my gatekeeper, where I took the role of a participant observer. Access to closed settings was granted, allowing me to sit in the front row during fashion shows and go backstage before and after shows. With my gatekeeper, my position and role as a researcher was much more visible. For ex-

ample, my gatekeeper would introduce me as a researcher studying the Canadian fashion industry to designers and/or key informants. I would then have the opportunity to exchange contact information and follow-up to arrange interviews. I also received invitations to attend events such as the Press and Buyers Brunch that takes place during Toronto Fashion Week. This is an event where smaller designers (who are typically not at the stage to put on a full runway show) can show their collection to media and buyers, as well as distribute press packets and buying information. At these events, I could introduce myself directly to designers and then follow up for interviews, as well as receive their promotional material (such as look books).

The second consideration is to determine the role you are going to take as a researcher. As Cook (2005) describes, access also means negotiating your role within the community you wish to study and requires reflection on how you are going to present yourself as a researcher. During participant observation, I was transparent about my role as a PhD student studying the industry. Emphasizing my outsider role as a researcher outside the field was often an advantage, as those I was with during participant observation would often take additional time to explain the event that was unfolding.

The third consideration in conducting observation is the type of data that can be collected. Data collection is reliant on a number of factors including: 1) the extent to which you are able to access the community you wish to study; 2) the role you play during the research process; 3) power relations during your research encounters; 4) the type of data you were able to collect; and 5) your impressions of the community and how these change over time (Cook, 2005, pp. 180).

During an observation and/or participant observation event, the criteria in Table 5 were considered. First, with respect to fashion week, the physical layout and different spaces were observed (for example, the runways and studio showcase rooms), with a focus on how these spaces changed over time. For example, I could observe the changing dynamics of fashion week over the course of the week-long event, as well as during a single day (smaller studio shows took place during the day and were often quieter, while Toronto celebrities would be in attendance during the 7pm and 8pm shows). While much of this activity took place indoors, I could also observe the scene inside the tents where sponsors have promotional areas and showcases and outside the tents where fashion bloggers are hoping to be photographed by other bloggers and media before and after runway shows. In addition to attending fashion shows and showcases during fashion week, participant observation also took place at related onsite events, such as a

Press and Buyers Brunch co-organized by the City of Toronto. I also attended fashion-week related events around Toronto that took place offsite.

The final space for participant observation took place in fashion retail shops, both in Toronto and internationally. Independent fashion retailers are a key space for curation and consumption within the fashion industry (Leslie et al., 2015). These spaces were observed for aspects such as the store layout, merchandizing, and visual/brand identity. This also provided an opportunity to interact with shop-clerks and/or designers.

Table 5: Observation criteria

<p>During an observation and/or participant observation event, the following criteria were considered:</p> <ul style="list-style-type: none">• The physical layout of the fashion week ‘tents’<ul style="list-style-type: none">- Advertiser/sponsor booths- Mercedes-Benz Start-up Competition showcase- The main runway – experienced from the front-row with gatekeeper and the back-row through purchasing general admission tickets- The studio – smaller studio showcases for emerging designers• Time of day: how time impacts the type of event<ul style="list-style-type: none">- Smaller, lesser-known events held during the day- Main runway shows at 7pm and 8pm- Who is in attendance at each show? What is the ‘buzz’ like?• Audience: who is in attendance?<ul style="list-style-type: none">- Studio shows typically had smaller attendance, fewer ‘mainstream’ media, (e.g. from The Globe and Mail) and more bloggers- Evening shows consistently draw ‘bigger’ names from the mayor to celebrities filming in Toronto and well-known bloggers- Attendance at shows reflected in media coverage the following day

- Additional events during Toronto Fashion Week (onsite)
 - Press and buyers showcase co-organized by Toronto Fashion Incubator and the City of Toronto
 - Bloggers and street-style photographers outside of the tents before and after runway shows

- Additional events during Toronto Fashion Week (offsite)
 - The Shows in March 2014
 - Designer showcase at local mall The Eaton Centre
 - Politics of Fashion exhibition at the Design Exchange

- Visiting fashion retail shops (Toronto and internationally)
 - Store layout and merchandizing, visual / brand identity
 - Interaction with shop-clerks and/or designers in these spaces

Data collection primarily took the form of a field diary. During events such as runway shows during fashion week, it was also possible to take photos and videos, as well as collect materials such as promotional material from designers (such as their look books, order catalogues, and fabric samples), sponsors, and the media. Photos and materials also aided the recording of field notes and reflections on experiences gained during observation. When it was not possible to record notes with pen and paper, notes would be made once an event had concluded.

4.8 Online observation and social media analysis

In recent years, the emergence and widespread adoption of online and web 2.0 technologies has increased the number of data sources that are available to researchers (Allen, 2009; Chittenden, 2010, Hine, 2004). Independent fashion designers are very active online, both through websites and social media. A question then becomes how to study this online presence, in terms of collecting, analyzing, and utilizing this data. For this research, the purpose of conducting online observation and social media analysis was twofold: as a means of gaining background information, and as a way of examining the ways in which social media platforms are utilized by designers (see: Table 6).

Table 6: Online observation criteria

For each designer, the following online characteristics were considered:

Website: What is the function of a designer's website?

- *About Us*: Where a designer provides an introduction to the brand and brand history
- *Press*: Links to previous press coverage (domestic and international) the designer has received
- *Look-book*: Catalogue of professional photographs of clothing from current and previous season collections on models
- *Web-shop*: Where the current and/or previous season's clothing is available for sale
- *Stockists*: A list of physical and online retailers where clothing is for sale, both in Canada and abroad

Social media: How does a designer utilize social media to communicate with consumers?

- *Instagram*: Posts can be 'liked' or commented on by viewers. Online shopping has been increasingly integrated into the platform (such as embedded links to purchase)
- *Twitter*: Often links to Instagram or blog posts, less dedicated content
- *Facebook*: Often functions similarly to a website (providing opening hours, location, number of stars/ranking) but with more customer information
- *Other*: Less utilized social media platforms, such as a tumblr page, Pintrest profile or standalone blog.

First, online material was utilized to create a 'designer profile' comprised of the information on a designer's website. This data, recorded in Excel, included information on the designer's brand history (often in an "About Us" section of the website), details about the type of domestic and international press the brand received, notes on look-books from past and present collections, the functionality of their online web-shop, and finally a list of stockists where their collection could be found in Canada and internationally. Collecting and analyzing this material provided necessary background context for interviewing designers, while ensuring interview questions were not asking for information that was already available.

The second objective of this analysis was much more exploratory, examining the ways in which independent fashion designers utilize

social media to promote themselves and their brand across different platforms, including Instagram, Twitter, and Facebook. This included reviewing a designer's profile, which is typically archived in reverse-chronological order. Instagram, a highly visual medium comprised largely of images and/or short videos with a brief text accompaniment, stood out as the dominant social media platform independent fashion designers were active on. In particular, I became interested in the ways in which independent fashion designers utilize images of the Canadian landscape in their branding activities on Instagram. This became the focus of a paper written for the National PhD course *Landscape and Identity*. The methodology employed in conducting that the analysis in the (currently unpublished) course paper will be described here. While the paper is not included in this thesis, the purpose of including this methodological discussion is to provide my interpretation of how online data can be collected and provide step-by-step instructions as an example of how one could work with this type of social media data.

To analyze the Instagram profiles of independent fashion designers, this analysis followed Rose's (2012) critical approach to the study of visual materials. This requires the researcher to: take images seriously, think about the social conditions and effects of visual objects, and consider your own way of looking at images (Rose, 2012, pp. 15-16). The method of analysis was compositional interpretation, which focuses on the 'content and form' of images. In conducting compositional interpretation, there are three sites where the meanings of images are made: the site of production, the site of the image itself, and the site where the image is seen by various audiences (Rose, 2012, pp. 16). There are also three modalities to consider: the technical (visual technologies that enhance vision), compositional (strategies that go into how image is made) and social (range of economic, social and political relations, institutions and practices that surround an image) (Rose, 2012, pp. 170).

This analysis focused predominately on the image itself (that is, an Instagram post), examining the compositional modality and the social modality of the images. The following questions, posited by Rose (2012) guided this analysis:

- What is being shown?
- What are the components of the image?
- Is it one of the series?
- What do the different components of the image signify?
- Whose knowledges are excluded from this representation?
- Is this a contradictory image?

Central to compositional interpretation is ‘the good eye.’ The good eye is defined as, “a way of looking at paintings that is not methodologically explicit but which nevertheless produces a specific way of describing paintings” (Rogoff 1998, pp. 17 in Rose, 2012). It is argued that extensive contextual information on behalf of the researcher is needed in order to use the good eye. In this case, the good eye has been developed through extensive knowledge on the Canadian fashion industry from interviews, observation, and document analysis.

The first step of applying this methodology was to identify fifteen fashion firms from across Canada to analyze. This preliminary analysis comprised of reviewing the 100 most recent Instagram posts of each firm, counting the number of posts that included the landscape in some way. Based on this, the five firms with the most use of the landscape in their visual branding were chosen to conduct a more in-depth compositional analysis. In total, over 2000 images from the Instagram accounts of five Canadian fashion firms were examined, to produce five vignettes on each how each firm portrays fashion, identity and the Canadian landscape in their branding. There is a great deal of potential in using online data in geography research, and this paper continues to be a work in progress.

Finally, a note about ethics and online data. One concern when conducting research online relates to ethics such as informed consent, confidentiality, and privacy (Mathy et al., 2003). Researchers such as Hookway (2008) argue that online material that has been made public (i.e., is searchable and is not password protected) is ‘fair game’ and is available for researchers to study and utilize. There are debates as to whether or not the identity of those whose data is being studied should be protected or not, and a number of factors inform this decision, such as the composition of the population that is being studied online (for example, young people) as well as the nature of the subject being studied (Mathy et al., 2003). In my research, the online material studied was primarily utilized for promotional purposes, clearly was intended to be public, and does not include sensitive material. While it could be justified to provide identifying details of those being studied, as my sample of designers has been kept anonymous, identifying a designer’s social media platform could compromise anonymity. Therefore, designers are not identified in any part of this online analysis.

4.9 Policy document analysis

An additional method for this thesis was a review of creative industry policy in Canada. Bowen (2009, pp. 27) defines document analysis as,

“a systematic procedure for reviewing or evaluating documents—both printed and electronic (computer-based and Internet-transmitted) material”. A key rationale for utilizing document analysis is the opportunity to triangulate findings from multiple data sources, particularly when engaging in case study research, as well as providing background information to a case, and as a way to track change over time (Bowen, 2009). Moreover, the triangulation of findings between multiple data sources adds additional rigor and can help in offsetting potential biases.

The rationale for conducting this analysis emerged while in the field. A dominant, reoccurring theme early on from interviews was the difficulty independent fashion designers faced in accessing capital. This perceived lack of government investment was described as a major stumbling block to growing a business and staying in operation. In order to investigate and substantiate these experiences, a review of policy documents was conducted to analyze these claims and explore if in fact, policy has systematically overlooked the fashion industry in Canada. The first step was to identify and collect all the creative industry reports that have been written in Canada in recent years. The timeframe 2000 to 2016 was selected, as this was the era when creative industry policies began entering the policy discourse in Canada. In total, 36 policies were reviewed (a complete list of policies can be found in Paper 1). A number of cities, regions, and provinces have engaged in the process of commissioning reports benchmarking, analyzing, and providing recommendations to strengthen the creative economy of that particular places the fashion industry was mentioned as part of the creative and/or cultural economy. Reports were reviewed to determine first, if the fashion industry was included in the definition of creative and/or cultural industries utilized in the report, and second, if the fashion industry was identified in policy recommendations. The full results of this document analysis are presented in detail in Paper 1.

4.10 Analyzing material

The matter of how to analyze qualitative data is often a ‘black box’ (Schiellerup, 2008). As Schiellerup (2008, pp. 164-165) describes, “data analysis, as interpretation of experiences encountered in the course of the research process, goes on throughout the research process and not only in dedicated moments of focused data interpretation.” In conducting the analysis of the qualitative materials gathered during fieldwork, I was guided by the work of Crang (2005) when developing a strategy to manage the large amount of data that qualitative research produces. In addition to interview transcripts, I also had

data from observation field notes, photos, print materials (such as designer look-books and other promotional materials), and newspaper and social media articles. The first step in analyzing my materials was to organize all of the collected data and ensure it is a readable form. This meant transcribing interviews, as well as typing and organizing field notes from observation. Reminders – such as the date, time and location of the interview – were included with transcripts as a tool to jog memory in the analysis stage (Crang, 2005; Valentine, 2005). All transcription and the organizing of transcripts and other materials collected, was handled solely by myself. While this is a labour-intensive process, it allows the researcher to re-familiarize themselves with the data collected in the field, identifying gaps in knowledge as well as areas for deeper exploration (Crang, 2005).

The purpose of coding is to aid in data reduction through organizing and sorting data into themes that can be analyzed and used for theory-building (Cope, 2005). In analyzing my material and writing up the results of my fieldwork, I favoured a ‘low-technology’ approach. I transcribed recorded interviews verbatim, along with field notes, and then coded this material according to theme (Cope, 2005). I prefer to code by hand, rather than use a transcription or analysis software to assist in this process. From previous experience, I have found this method to be the most effective. As I prefer a grounded theory approach to identifying themes in qualitative data (Schiellerup, 2008), spending time immersed in the data and going through transcripts and other materials was extremely beneficial. I used open coding (Crang, 2005) where the researcher goes through material slowly and in detail, taking notes alongside the text, in order to ‘get a feel’ for the material. The next step was to then go through those notes and identify key themes in theoretical memos. This process began with a broad list of themes, recognizing that some themes would be added to and expanded upon, while others would be removed.

An additional factor that shaped my analysis was the geographic separation from my fieldwork location (Canada) and where I did the majority of my writing (Sweden). When in Canada for fieldwork, this was often an intense period when I would conduct multiple interviews and observations, and be immersed in different aspects of the industry on a regular basis. During this time, I would be extremely focused on the on the ground details of the events I was attending and experiences of interviewing. Conducting data analysis and writing while in Sweden provided a geographic separation from my case study and provided the opportunity to step back from the field and reflect on the bigger

picture themes that were emerging from the data, and focus more clearly on making connections to theory.

4.11 European comparison

While the previous section described my research as a Canadian case study, I had the opportunity to take advantage of studying in Europe to engage in comparative research. An important dimension of the Canadian fashion industry is the challenge of building an international business. European fashion industries, such as that in Italy or Sweden, were often cited as examples of what the Canadian fashion industry should aspire to, with some interviewees debating whether to stay in Canada or make a move. This comparative research took the form of smaller case studies of Milan, Italy; London, England; Stockholm, Sweden; Antwerp, Belgium; and Zurich, Switzerland. This fieldwork comprised of nineteen additional interviews – five interviews in London, five interviews in Stockholm, and nine interviews in Zurich – as well as observation in Milan and Antwerp.

The purpose of this fieldwork was not to be representative of the situation for independent fashion designers in each location, but rather to gain a preliminary understanding of the independent fashion scene and culture in other places. This research also facilitated a better understanding the Canadian case and Canadian data by comparing against other contexts in Europe. Interviewees were recruited in a similar fashion to those in the Canadian sample: from media, the rosters of independent fashion weeks, online searches for independent and slow fashion designers, and snowball sampling. Interviews primarily took place in person (unless a scheduling conflict or cancellation led to the interview being completed over Skype) and followed a modified version of the interview guide utilized in the Canadian case. In addition to interviews, observation took place at a number of sites, including pop-up shops, fashion museums, and designer studios. While this data may serve as the foundation for a future research project, a key advantage from conducting these interviews was the opportunity to reflect upon the peculiarities of the Canadian case. For example, in Stockholm, the organization of the fashion industry in Sweden was evident, as well as the emphasis on design and branding in the city, while in Milan I reflected upon the role and dominance of global firms, such as Gucci and Prada, in the national fashion system.

4.12 Summary

This section has provided an overview of the key methods (interviews, participant observation, and policy document analysis) that were utilized during the fieldwork for this thesis on the Canadian case. In addition, comparative research in Europe was also conducted in order to place the Canadian case in a broader perspective. In total, over one hundred interviews were conducted. The following chapter presents the findings from this fieldwork.

5. Findings: Presentation of the papers

5.1 An “orphan” creative industry: Exploring the institutional factors constraining the Canadian fashion industry

This paper presents a comprehensive overview of the contemporary fashion industry in Canada. This research contributes to the literature on fashion and economic geography through examining an industry that is struggling, rather than thriving, and in a geographic context that falls outside of the traditional fashion capitals that are typically the focus of academic study. The key question driving this research is: why is the Canadian fashion industry struggling? In answering this question, this paper explores the institutional factors that constrain the Canadian fashion industry.

While the historical roots of the Canadian industry have been studied, less is known about the current state of the fashion industry in Canada, which has experienced a number of challenges in recent years. For example, the largest fashion week in Canada – Toronto Fashion Week – was cancelled in 2016, while a number of well-respected independent fashion labels have closed their doors. With few notable exceptions, many independent Canadian fashion designers struggle to create long-term, sustainable careers in the fashion industry. Interviews with independent fashion designers who are still in business, revealed significant obstacles facing those in this occupation: difficulties with accessing capital to produce their collection and grow their business, difficulties with receiving media attention, difficulties accessing retailers and consumers, as well as difficulties with gaining policy support and recognition.

This paper is broadly situated in the national systems of innovation literature, which is utilized as a framework for identifying structural factors constraining the Canadian fashion industry at five system levels: historical, core, cultural, socio-economic structures, and policy supports. This paper illustrates how a theoretical framework, taking into account a wide range of factors to understand the performance of a national industry, can be utilized. It is argued that it is not a ‘talent’ issue which hinders the Canadian fashion industry – as independent

fashion designers are innovative, highly educated and creative workers – but, rather, it is a combination of local and national factors at these system levels that impact the performance of the independent fashion design sector in Canada.

A key implication of these challenges is the risk of a fashion ‘brain drain’ from the country to places with more supportive institutional structures for the fashion industry. Canadian designers Tanya Taylor and Erdem Moralioglu found international success in New York and London respectively, and were frequently cited as proof of the opportunities and benefits of going abroad. As one designer stated: “What are the limits for my business if I stay in Canada? I have to think long-term about what my next move will be. Where do I see myself? Is it actually possible to get to where I want to be if I stay in Canada? It’s a question I ask myself on a daily basis...”

The Canadian fashion industry, despite its status as an “orphan” creative industry, holds many opportunities for the Canadian economy. However, if left unsupported, the implications would not only be confined to the fashion design sector, but also related sectors such as manufacturing and retail. Policy recommendations advocating for the inclusion of fashion as a creative industry by the Canadian government, as well as dedicated funding to support the growth of independent fashion design businesses are put forth.

5.2 A passion for fashion: Investigating the working lives independent fashion designers in Canada

This second paper focuses at the level of the individual and explores the day-to-day working lives of independent fashion designers in Canada. In order to examine the nature of work for independent fashion designers, the literature on labour in the creative industries and the literature on gender and entrepreneurship have been brought together. This paper begins by reviewing the unique institutional context that shapes their experiences. Namely, a lack of governmental recognition and investment in the fashion industry in Canada, coupled with a lack of centralized labour market intermediaries (such as a membership association for fashion designers) has resulted in an industry with low barriers to entry. While this provides the opportunity for many pathways to entrepreneurship and provides the space for creative freedom and innovative businesses, it is also a precarious career path with a high degree of individualized employment risk.

Empirically, this paper provides a comprehensive, on-the-ground account of the working practices of these creative workers, from their previous labour and educational experiences, their transition into the

fashion industry, and their daily working lives. The key tension explored throughout this paper is the desire of independent fashion designers to have autonomy and creative freedom, which comes at the expense of precarious entrepreneurial and labouring conditions. As will be described in more detail in Paper 4, many independent fashion designers develop unique businesses that engage in high-quality design and local manufacturing processes, which was found to often be reflective of a desire to align entrepreneurial goals with broader social and environmental causes. A common sentiment was the intention to create ‘not just another fashion brand,’ and instead create an alternative vision of themselves and their community in their business.

This paper also provides an opportunity to extend our understanding of the struggle to balance art and commerce, by examining aesthetic labour practices in the creative economy, the growing individualization of creative work, and difficulties of growing an independent, creative business. Fashion is a particular type of creative work that is both highly creative and demands exceptional technical skills unique to the industry (such as sketching, pattern grading and sewing), but is also highly professionalized and demands business skills such as supply chain management, marketing, and financial competences. As independent fashion designers are often the sole employee of their business – particularly when first starting the business – all of these demands fall on one person. Moreover, designers frequently engage in aesthetic labour practices in promoting themselves as an extension of their businesses. This requires the maintenance and regulation of embodied and aesthetic attributes, both in person and online.

As a result, employment risk and precarity is highly individualized. It was common in interviews for a designer to describe their day-to-day working lives as operating ‘in a bubble,’ rarely having interaction with other designers. This isolation often resulted in designers rarely networking, collaborating or sharing resources with other designers. Combined with a lack of institutional supports, this poses significant challenges for independent fashion designers to grow long-term businesses. This is argued to be a missed opportunity for economic growth and innovation. Moreover, the hidden nature of this work is perhaps a contributing factor to why, at the macro-level, the fashion industry is an “orphan” creative industry. It is argued there is a need for creative industry policy that is reflective of the actual and unique working lives and conditions of workers in these industries, rather than disembodied workers.

5.3 ‘Here, There and Everywhere’: How independent fashion designers mobilize mobility within the Canadian fashion system

This paper examines the regional dynamics of the Canadian fashion industry and the ways in which independent fashion designers operate within the national fashion system. Traditionally, it has been argued that creative industries and creative workers cluster in large urban areas. However, as new forms of independent production, digital technologies, and mobilities continue to change the nature of creative work, a question then becomes if creative workers still need to locate in established urban centres, or if a wider range of spaces are actually available to them. This paper explores how independent designers decide where to locate their business, as well as the ways in which independent designers operate within the regional system to sustain and grow their business. While Paper 1 presented an overview of the national system and the structural factors that constrain the industry as a whole, this paper zooms in to uncover regional variations within the Canadian fashion industry. While conventional wisdom may suggest that designers would flock to the largest urban area, in fact, interviews revealed that independent fashion designers can be found across the country. Moreover, this paper also uncovers the ways in which how designers access opportunities and resources in other parts of the national system through mobilising different forms of mobility (temporary, mediated, virtual) in strategic ways.

Before exploring mobility patterns, this paper first examines the locational choice decisions of creative workers in choosing their ‘home base’ location. Five regions within the Canadian fashion industry are explored: West Coast, Central Canada, Ontario, Quebec, and Atlantic Canada. This paper begins by describing the strengths and weaknesses of each region. For example, the West Coast, anchored by Vancouver, has developed a reputation for athletic and eco-fashions, while in Central Canada, local designers are rewarded by loyal customer-bases and a growing reputation for the region as an ‘in the know’ destination to find emerging designers. In Ontario, the fashion industry is highly professionalized, competitive and outward-looking. The province is also home to many of the intermediaries related to the fashion industry. Quebec is a much more insular region, but boasts a number of well-respected high fashion and outwear labels. It is also the only province where dedicated funding for fashion exists. Atlantic Canada’s fashion industry is characterized by small and innovative businesses serving niche markets. Designers described the fashion com-

munity in this region as more supportive, but lacking the infrastructure to scale-up a business.

However, this research also found that independent fashion designers are not confined to a particular locale, but rather move strategically across the different regions. As such, this paper also explores the ways in which independent fashion designers engage in different forms of mobility in order to extract resources and value from different parts of the national fashion system. First, independent designers engage in patterns of temporary and/or cyclical mobility by establishing a presence during key field-configuring events, such as fashion week. Temporary mobility to attend field configuring events can be beneficial for independent designers. The positive dynamics of a designers chosen home base can be complemented with short and recurring visits to other markets within the Canadian fashion system to access key events, actors, spaces and resources. This can allow a designer to work from their home base of choice most of the time, while joining the fashion scene of a larger or different market when it is important to be seen.

Second, independent designers work with intermediaries (such consultants or public relations firms) when seeking to create a presence in markets outside of their own. As Paper 2 revealed, independent fashion designers struggle to complete a growing range of creative and non-creative tasks, this research found that many designers in the sample are ‘getting help’ by turning to specialized intermediaries. This entails not only outsourcing specific tasks to intermediaries but creating a multi-locational presence by working with actors such as public relations firms, talent agencies, brand consultants, and bloggers, who are strategically located within key networks, markets and spaces. For example, one designer described being able to ‘pound the pavement’ in his hometown to access retailers and build buzz, but required the help of a PR firm that could stage his showroom and invite the right people to view his collection while in a larger city.

Designers also utilize online platforms and social media to establish virtual presences in a range of local, national, and international markets. While physical spaces, including temporary showrooms and independent retail shops remain vital for independent designers, online platforms are becoming increasingly important channels of promotion and distribution. Harnessing virtual mobility repositions actors in space and allows independent designers to act in real time in different places which may be local, regional or global. Moreover, these brand identities can also be linked to multiple places in strategic ways to enhance their distinctiveness and value. Designers can create and

communicate an imagined geography which links their products and brands to particular markets within Canada or international fashion capitals.

Taken together, this paper argues that while ‘making it’ in the Canadian fashion system is difficult, it is not essential to be permanently located in one of the big cities like Toronto, Montreal or Vancouver, because through mobilizing mobility, independent fashion designers can develop their businesses in different parts of the country. While the lack of one dominant ‘fashion capital’ may be a weakness, the findings suggest that it can also be a strength as the Canadian fashion system offers a variety of spaces for designers of different sizes, scales, and motivations, to build their fashion businesses.

5.4 Made in Canada: Local production networks in the Canadian fashion industry

Paper 4 explores the production processes behind the products that define many independent fashion design businesses in Canada. In recent decades, the fast fashion model has come to dominate the fashion industry: highly globalized, flexible, and efficient supply chains have led international fashion firms to specialize in inexpensive, trend-driven clothing. Fast fashion firms engage in global production networks, whereby the design, production, and distribution of clothing can take place in radically disparate geographies. Design work, for example, can be done in a fashion centre such as Stockholm, while production can be offshored.

While much of the fashion industry appears to follow the logic of fast fashion, Paper 4 offers a case study of made in Canada local production networks. Locally producing fashion in a country like Canada – that is neither a traditional fashion and production powerhouse, like the United Kingdom, nor a lower-cost manufacturing hub like China – provides a case study as to how a domestic fashion industry can compete in an era of hyper-globalization. Interviews with independent fashion designers revealed that a majority of respondents have chosen alternative, local production practices. This research is situated in literature on local production networks (LPNs), whereby firms rely on local resources to innovate and compete both locally and abroad. It is argued that the decision to engage in LPNs and work outside of the traditional fashion system provides independent fashion designers with the space for creativity, innovation, and control over their business.

The ways in which independent fashion designers utilize local resources, at the stages of production, distribution, and consumption are

explored. With respect to production, ‘timeless’ designs are utilized as a strategy to increase the longevity of an item of clothing, and is coupled with high-quality, local production in order to further ensure that clothing can be seen as an investment. At the next stage of the local production network – distribution – it is argued that independent fashion designers must work with local retailers to cultivate exclusivity and loyalty, both in-stores and online. Finally, in examining consumption, it is argued that designers must articulate the values of made in Canada to consumers in different retail environments. A key advantage of engaging in LPNs is the freedom for creativity and innovation that keeping control of production networks allows, rather than succumbing to the demands of the globalized fashion industry. Operating outside of the dominant fashion system also means there are lower barriers to entry for designers and a lack of an established hierarchy or ‘rules’ to the game to adhere to.

In reflecting on the conceptualization of LPNs, it is important to recognize the hybrid nature of the local, as it intersects with the digital, the national, and occasionally the international. An additional aspect of the local that was important in this case was pride in place and local identity, which connected the various actors across the LPN. Moreover, this may also be a key factor in anchoring talent in their communities and discouraging designers from moving their businesses abroad as they grow. Finally, as an economic competitiveness strategy, the niche market, quality-driven approach fostered by LPNs may be the most strategic way forward for Canadian independent fashion designers given the reality that Canada is not a low-cost country to produce in, and that domestic garment manufacturing facilities continue to exist.

6. Conclusions

“The Canadian fashion industry is on the upswing but we are still always under the radar. There are so many talented designers in this country, but no one takes notice. We have the potential to be growing and expanding as an industry” – Interview, designer.

This quote has been chosen to begin the conclusion because it highlights many of the key findings of this thesis. The Canadian fashion industry holds many opportunities for the Canadian economy – such as talented designers with sustainable production processes working in variety of spaces – but has untapped potential and faces significant challenges. At several points over the last four years the fashion industry in Canada has gained momentum, but has ultimately been unable to fully capitalize on opportunities to drive the industry forward.

This thesis began as an exploratory attempt to examine the contemporary Canadian fashion industry during a time of uncertainty in the industry. It is an empirically driven project, drawing upon data collected from a mixed-method research design to explore the strategies, spatial dynamics and working lives of independent fashion designers in the Canadian fashion industry. Four specific contributions to the existing literature have been identified. First, it has proposed an analytical framework, inspired by national systems of innovation literature, to the study of a national creative industry that has received limited policy support and recognition. Second, it contributes to our understanding of the contemporary nature of labour practices in the creative economy, by exploring the entrepreneurial experiences of an understudied and predominately female sample of creative workers. Third, in the context of new forms of digital technologies, this thesis updates the literature on mobilities and the individualized nature of locational choice decisions. Finally, it provides a contemporary account of the practices and processes that underpin local production networks, examining the ways in which these networks emphasize quality and local embeddedness but also creates challenges with respect to cost, growth, and scalability.

This thesis has also sought to make a methodological contribution, particularly with respect to the role of gatekeepers, participant observation, and the use of online data in qualitative research. The thesis described experiences of working with a gatekeeper in not only gain-

ing a deeper understanding of the subject of study, but also in facilitate access to interviewees and closed settings for participant observation. It has been argued that participant observation provided first-hand insight into the spaces and interactions of the field, acting as a bridge between macro-level issues in the Canadian fashion industry and individual experiences. Detailed observation criteria have been presented in an attempt to provide insight into the implementation of participation observation in research. Third, in exploring the importance of online spaces for independent fashion designers, the methodology of this thesis has provided tools for the collection and analysis of social media data.

In concluding, what are the takeaways of this case study? After reading this thesis, is the message that fashion designers prefer independence over prosperity? Or, is it a story about the importance of being in a successful regional or national system if you want to make it big? The answer is a bit of both. At the micro-level, this thesis is about the lives of independent fashion designs and how they work, and at the macro-level, it is about the role of cultural and creative industries in the Canadian economy and the need for strategic investment in this sector. This thesis has examined the tension between capitalizing on the strengths of a national system (highly educated creative workers, low barriers to entry, and a diversity of spaces), while overcoming the weaknesses (a lack of policy investment and industry coordination, and the growing threat of brain drain).

At the micro-level, independent fashion designers in Canada are an educated, innovative, and passionate group of creative workers who have embarked on a career path that demands they be entrepreneurial and professionalized, while also possessing technical and creative skills unique to the fashion industry. A career as an independent fashion designer provides the freedom for artistic expression and fulfillment, but also is a highly precarious career path. It is a challenge to access the capital – private or public – needed to produce a collection and grow a business. It is a challenge to access retailers – particularly major retailers – and get made in Canada clothing before consumers. It is a challenge to convince Canadian consumers that fashion is part of the cultural identity of the country and to get excited about domestic fashion brands. And it is challenge to receive government support and recognition for their industry in the way other creative and cultural industries do.

However, independent fashion designers develop strategies to overcome these challenges. This has included the strategic utilization of mobility and locational choice decisions in order to seek to mediate

the risks and freedoms associated with being an independent creative worker, as well as the utilization of local production networks, with high-quality, value-added production, design, and distribution practices, to ‘stand out in the crowd.’ Rather than seek to imitate other actors in the marketplace, or engage in a race to the bottom in terms of cost, independent fashion designers in Canada have developed new strategies to generate types of value that goes beyond simply cost.

At the macro level, perhaps the greatest weakness of Canada’s regional system is that it lacks a dominant city that can act as a springboard to international success. The Canadian fashion industry struggles to build bridges into the global fashion system. Indeed, even a global city such as Toronto struggles to function in the same manner that New York, London, or even emerging fashion capitals such as Stockholm.

However, there are also key strengths that can be capitalized on in the Canadian fashion industry. The diverse regional system that comprises the Canadian fashion industry provides a variety of ‘home base’ locations for entrepreneurs of different sizes, scales, and ambitions to build their businesses; whether that is a young designer who moves to Toronto with ambitions to become a global womenswear brand, or a niche business focusing on handmade products in Prince Edward Island. There is a freedom and flexibility that the Canadian fashion industry affords independent designers to experiment and create. Despite its challenges, the Canadian fashion industry still provides insights as to ways in which to build a more sustainable fashion industry, and more inclusive local economies, by emphasizing the economic and social potential of small business entrepreneurs. The Canadian fashion industry must find a way to harness the strengths and mitigate the weaknesses of the fashion system.

Finally, this thesis raises a number of questions and areas for future research. First, while this thesis has laid a foundational understanding of the contemporary Canadian fashion industry, there is much more to be done in studying the different local communities, cities, and regions that make up this industry. Second, through studying local production networks, this thesis has begun to explore the impact of sustainability and slow fashion in the fashion industry. While here the focus was on independent designers, an area for future research could also examine the sustainability strategies of international and/or fast fashion firms, as well as new spaces of consumption (such as second-hand retailers and sharing platforms) in changing consumer behaviour. Third, as the impact of digital technologies continues to be felt across the fashion industry, there are many questions that are currently unan-

swered. For example, in the so-called era of democratization, has the playing field been leveled, or will established hierarchies prevail? And, as online retailers continue to open bricks-and-mortar stores, and vice-versa, how will digitalization shape the future of retail? Going forward, the fashion industry can serve as a fruitful case study for economic geographers to engage with and explore.

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