

Standing out in the crowd: the rise of exclusivity-based strategies to compete in the contemporary marketplace for music and fashion

Brian J Hracs

Department of Social and Economic Geography, Uppsala University, Kyrkogardsgatan 10 plan 4 (Ekonomikum) Box 513, 751 20, Sweden; e-mail: brian.hracs@kultgeog.uu.se

Doreen Jakob

College of Life and Environmental Sciences, Geography, University of Exeter, Amory Building, Rennes Drive, Exeter EX4 4RJ, England, and Department of Communication Studies, University of North Carolina at Chapel Hill, 115 Bingham Hall, Chapel Hill, NC 27599-3285, USA; e-mail: d.jakob@email.unc.edu

Atle Hauge

Eastern Norway Research Institute, Skolegata 1, 2317 Hamar, Norway;
e-mail: atle.hauge@ostforsk.no

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Abstract. Geographers have studied the complex relationships between cultural production, consumption, and space for some time, but the marketplace for cultural products is being reconfigured by digital technologies and broader societal trends. For producers of fashion and music the contemporary marketplace is a double-edged sword featuring lower entry barriers and fierce competition from an unprecedented number of producers and ubiquitous substitutes. Global firms and local entrepreneurs struggle to stand out in the crowd and command monopoly rents for their unique goods and services. This paper examines how independent cultural producers use ‘exclusivity’ to generate attention and distinction. Drawing on qualitative research with independent musicians and fashion designers in Toronto, Stockholm, Berlin, and New York it presents three mechanisms through which exclusivity can be created. These include exploiting consumer demand for uniqueness, enrolling consumers into the production and promotion process, and manipulating physical and virtual space.

Keywords: independent production, music, fashion, competition, consumption, exclusivity, production of physical and virtual space

Introduction

The contemporary marketplace for cultural products is characterized by infinite choice and intense competition, but the oversupply of music and fashion-related items is particularly acute (Hauge and Hracs, 2010; Power, 2010; Power and Hallencreutz, 2007). For instance, Apple’s iTunes music store offers over 18 millions songs and Etsy features over 10 million clothing items (Apple, 2011; Etsy, 2011). For producers in these industries, digital technologies that alter the way goods are produced, promoted, distributed and consumed represent a double-edged sword. Declining entry barriers create fierce competition and what we call the ‘dilemma of democratization’ curtails the ability of cultural producers to command monopoly rents for their ‘unique’ goods and services (Harvey, 2001). As a result, the burden for global and independent producers of music and fashion has shifted from production to promotion and developing strategies to ‘stand out in the crowd’ has become a top priority.

In a taste-driven economy the imperative to ‘singularize’ products is well established and theoretical and empirical studies have examined the causes and consequences of market saturation (Anderson, 2006; Callon et al, 2002; Harvey, 2001; Postrel, 2003; Von Hippel, 2005; Zukin and Maguire, 2004). In geography a growing literature considers the branding and differentiation strategies of global firms such as Burberry (Power and Hauge, 2008; Tokatli, 2012), Gucci (Jansson and Power, 2010), Newcastle Brown Ale (Pike, 2011), and Prada (Crewe, 2010). These studies highlight the deliberate attempts by firms to imbue products and brands with specific spatial associations. As Pike notes, “branding relies upon the identification, articulation and representation of signs and symbols inescapably entangled with their spatial context and connotations” (2009, page 624). This literature also suggests that geographical differentiation is often combined with manufacturing, organizational, and marketing strategies to generate distinction and value.

This paper attempts to contribute to this literature in several novel ways. First, instead of continuing to privilege the capital-intensive strategies that global firms use to stand out, this paper focuses explicitly on how local independent musicians and fashion designers use the concept of exclusivity to overcome their economic limitations, differentiate their products, and collect monopoly rents (Harvey, 2001). In this context, 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. Crucially, although this mode of production is often dismissed as a niche alternative, it is rapidly becoming a significant source of economic activity and employment in the cultural sector. In Canada, for example, over 95% of all musicians are not affiliated with major or independent record labels and thus operate as independent entrepreneurs (Hracs, 2009).

Second, this paper highlights the important fact that, unlike the majority of global firms, many independent producers are not solely motivated by economic profit but rather a combination of emotional and monetary rewards (Anderson, 2006; Sennett, 2008). Indeed, whilst existing studies (Tokatli, 2012) often situate the competitive strategies of global firms in terms of increasing market share and profitability, local independent producers compete to earn sustainable incomes that allow them to cultivate their creativity. Echoing Sennett’s (2008) description of contemporary craftsmen who endeavor to do a job well for its own sake, our respondents are guided by psychic rewards ranging from the intrinsic joy of creating a piece of art to the extrinsic peer recognition received for musical performance. These alternative aims are often accompanied by self-exploitation and significant risks (Banks, 2007; Hracs et al, 2011; Jakob, 2009; 2013; McRobbie, 1998) but acknowledging them highlights values that are not purely economic. After all, Bourdieu (1993) long ago identified a subfield of restricted cultural production in opposition to the mass market in which the pursuit of economic profit is typically disavowed in favor of symbolic profit (see also Crewe et al, 2003).

Third, by focusing on exclusivity, a strategy that entails exploiting the desire of sophisticated consumers to signal their individuality by finding and consuming unique products (Zukin, 2004), this paper nuances theory and connects it to practices occurring on the ground. It builds on key concepts such as the theory of social distinction developed by Veblen ([1899] 1912), Simmel (1904), and Bourdieu (1984), and Chamberlin’s ([1933] 1962) ‘theory of monopolistic competition’ to nuance and update our understanding of ‘real’ and ‘imagined’ exclusivity. Moreover, it draws on empirical evidence from 252 in-depth interviews with independent musicians, fashion designers, and key informants to construct a typology of three common mechanisms through which the concept of exclusivity is actually operationalized. In so doing it demonstrates that at a time when digital technologies enable

and accelerate the introduction of new models of production, marketing, distribution, and consumption, harnessing exclusivity helps independent producers with limited economic resources to pursue their passions in a hypercompetitive marketplace.

Fourth, unlike studies that concentrate on the dynamics of one firm, one industry, or one location, this paper contributes a broader geographic perspective by considering the experiences of over 100 local entrepreneurs who compete in two industries (music and fashion) and four cities (New York, Berlin, Toronto, and Stockholm). This perspective revealed that, although these cities occupy different positions in the global marketplace and feature different institutional regimes, the exclusivity-based strategies being used in these locations are remarkably similar—a noteworthy finding given the geographic preoccupation with local specificity and uniqueness. Beyond identifying this uniformity, the paper also explains how strategies diffuse within and between scenes and industries.

Ultimately, whereas the broader literature indicates that global fashion houses and major record labels ‘stand out’ by mobilizing their considerable economic resources and vertically integrated structures (Crewe, 2010; Jansson and Power, 2010; Power and Hallencreutz, 2007; Tokatli, 2012) this paper focuses on how local independent cultural producers attract attention and monetize their creative content on shoe string budgets. After briefly outlining the research design, the paper describes the ‘dilemma of democratization’. This is followed by an analysis of how independent musicians and fashion designers operationalize the concept of exclusivity to market and sell their products. In particular, we provide illustrative examples that typify the three most common strategies found across our sample. These include: (1) tapping into the individualization of demand, (2) integrating consumers into the production and promotion process, and (3) manipulating physical and virtual space. This is followed by a brief discussion of how independently produced cultural content is curated and how exclusivity-based strategies are appropriated and adapted across space, industry, and scale. The conclusion considers the effectiveness and long-term sustainability of using exclusivity as a source of distinction and value.

Background and research design

This paper is unusual in that it draws on empirical evidence from three separate research projects. Instead of jointly designing a research project explicitly aimed at exploring the marketing strategies of independent cultural producers and then jointly conducting interviews with a standard protocol, each author conducted their own project independently. However, as subsequent discussions and data comparison between the authors revealed, the three projects featured remarkably similar objectives, data collection methods, and findings.

As figure 1 illustrates, each of these projects involved open-ended interviews with independent musicians and/or fashion designers in Toronto, Stockholm, Berlin, and New York. Moreover, although the exact wording of the questions varied, each of the three projects asked respondents about the strategies they use to differentiate and monetize their products and their careers more broadly. All of the interviews were recorded, transcribed verbatim, and coded according to dominant themes. Each project also obtained broader perspectives on these dynamics by interviewing key informants such as managers, music producers, storeowners, and policy makers. In each case the interviews were complemented by an analysis of relevant media coverage and participant observation. Each author observed how products were marketed by visiting similar spaces in their respective cities including retail shops, fairs, marketing events, and music performances. Finally, two of the three authors participated directly in local markets as a musician and a fashion designer and this personal engagement and familiarity, as noted by Valentine (2005), proved useful in establishing rapport with respondents and interpreting the rich results of the interviews and observation.

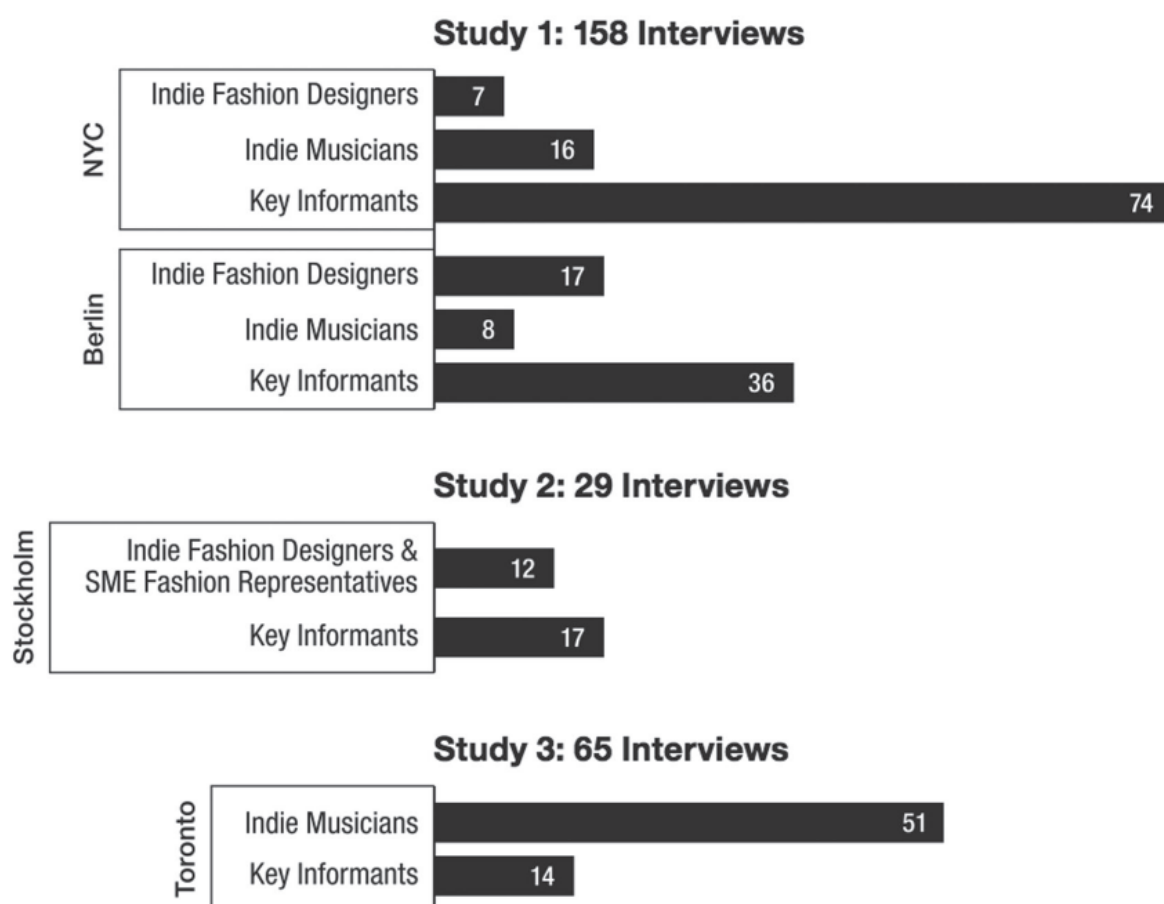


Figure 1. Interview sample.

Upon completion of the internally consistent and rigorous fieldwork each author analyzed their data and independently identified the use of exclusivity as a strategy to generate attention and value. However, it was not until the three authors met and shared their ideas and evidence that a more complete picture of these strategies emerged. Therefore, although we freely acknowledge the lack of complete uniformity between the cases, the high degree of overlap convinced us that combining our data would generate a better understanding of exclusivity and a more original contribution to the field. Such a combination allowed us to construct our arguments and the three-part typology from the larger sample of 252 in-depth interviews. Moreover, because this sample included interviews with independent musicians and fashion designers we were able to extend our analysis beyond one single industry. As these respondents operate in Toronto, Stockholm, Berlin, and New York the combination also allowed us to consider the use of exclusivity-based strategies in four centers of cultural production. This analysis proved valuable because it helped us identify commonalities across the two industries and four locations and determine how exclusivity-based strategies diffuse and are appropriated within and across scenes. Ultimately, at a time of increasing globalization, labor mobility, and hypercompetition we believe that bringing together responses from as many independent producers as possible has yielded a more complete and nuanced account than any of the authors could have produced on their own. As such, we also believe that any methodological unevenness is outweighed by the value of exploring these phenomena and establishing a foundation for future research.

Creating a crowd: the dilemma of democratization

The contemporary marketplace for cultural products features intense competition between producers and volatile demand from sophisticated consumers (Grabher et al, 2008). Although digital technology is often singled out for establishing this environment (Currah, 2003), our research suggests that several trends produce the ‘dilemma of democratization’ and the intensifying imperative to stand out (Leysdon et al, 2005).

Historically, the number of people who produced and consumed cultural goods and services was small and cultural producers were often skilled artisans financed by wealthy patrons (Wilson, 2000). The value of cultural products was protected by the skill required to produce or replicate them and sheer scarcity in the marketplace (Harvey, 2001). In the 20th century, however, several important economic, social, and political trends transformed the niche status of cultural products in Western society. During the postwar boom, the middle class became satiated with durable goods and directed a growing share of their disposable income to the consumption of cultural products (Paterson, 2006; Zukin, 1989). As demand increased, cultural occupations became more socially acceptable and the number of cultural producers grew dramatically. At the same time, Western governments reinforced the integration of cultural occupations into the mainstream labor market by promoting and regulating the education and employment of these individuals (Zukin, 1989). Yet, the professionalization and industrialization of cultural production would not have been possible without a concomitant shift in consumer behavior (Horkheimer and Adorno, 1972; Paterson, 2006).

The pioneering works of Veblen ([1899] 1912) and Simmel (1904) demonstrate that the consumption of cultural products allows people to communicate characteristics such as class, status, occupation, and individuality through a system of codes, symbols, and signs. Indeed, fashion is the quintessential signifier of class and way for elites to distinguish themselves from the masses (Simmel, 1904). Today, the desire for social distinction, prestige, and personality via consumption and style is intensifying (Bourdieu 1984). For Zukin (2004) shopping is the primary strategy for creating value and way for individuals to define who they are and what they want to become. Paradoxically, constructing an identity through consumption involves striking a balance between group conformity and individuality (Hauge and Hracs, 2010; Paterson, 2006).

These developments have also been influenced by the twin processes of societal detraditionalization and individualization, through which “social agents are increasingly ‘set free’ from the heteronomous control or monitoring of social structures in order to be self-monitoring or self-reflexive” (Lash and Urry, 1994, pages 4–5). Thus, Simmel’s ‘leveling effect of democracy’ (1904) has evolved into a general condition of ‘reflexive accumulation’ (Lash and Urry, 1994). Today, using consumption to construct narratives of personal identity has become common practice and choosing certain products over others allows consumers to exercise their judgment of taste and articulate their sense of class and cultural identity [Shipman (2004); Paterson (2006)—for a detailed literature review of the relationship between social structures, cultural practices, and consumption see Zukin and Maguire (2004); Zwick et al (2008)].

Individualization, self-expression, and consumerism are mutually reinforcing and driven by the symbolic properties that cultural products imbue into everyday life. Value is increasingly determined by aestheticization, branding, and marketing rather than by material and labor inputs (Gotham, 2002). Klein (2000) argues that companies across the spectrum are cutting the cost of manufacturing while exorbitantly expanding marketing budgets—a trend that Tokatli (2012) highlights in her study of Burberry. Moreover, as the aesthetic imperative increases and the production of cultural products accelerates, even

traditional use-value products are being imbued with symbolic content and marketed as cultural products. Postrel asserts that, although functionality still matters, “competition has pushed quality so high and prices so low that many manufacturers can no longer distinguish themselves with price and performance, as traditionally defined. In a crowded marketplace, aesthetics is often the only way to make a product stand out” (2003, page 2).

The fundamental equation of contemporary markets remains unchanged but digital technologies accelerate consumerism and choice (Currah 2003; Featherstone 1998). As Anderson argues in *The Long Tail* (2006), the tools of production have been democratized. New and more accessible technologies—from digital cameras and audio recording equipment to software for creating music, photographs, websites, video games, and clothing—drastically lower entry barriers and facilitate the production of an unprecedented number of cultural goods (Hracs, 2012; Von Hippel, 2005). Democratization is acute in the music industry where large capital-intensive recording studios and teams of specialized sound technicians and producers are being replaced by home studios, personal computers, and user-friendly software (Leyshon, 2009). The ability of the Internet to create, fragment, and hybridize the channels of promotion and distribution has replaced the standardized one-way flow of information and products with a dynamic and constantly evolving global bazaar of production, promotion, and consumption (Bugge, 2011; Featherstone, 1998).

Beyond simply democratizing the production process, digital technologies also enable the democratization of consumption, distribution, and promotion. Technology reduces the need for physical retail space and allows producers to display and sell their products to wider audiences at much lower costs (Featherstone, 1998; Jakob, 2013). As Anderson (2006) argues, for goods like music, which can be digitized, distribution costs approach zero and thus, whereas the largest offline music store typically offers 15 000 albums, Apple’s iTunes Store lists millions. The goods in what he describes as the ‘long tail’ include former hits and true niche content that has never been released through traditional distribution channels.

Internet access facilitates and encourages on demand consumption and social media programs such as Facebook, MySpace, YouTube, Twitter, and blogs make branding and promotion omnipresent (Bugge, 2011). Virtual spaces are now popular, influential, and lucrative stalls within the marketplace. According to *The Wall Street Journal*, close to half a million Americans used blogging as their primary source of income in 2009 (Penn, 2009). Furthermore, web portals like SecondLife.com, a 3D virtual world where users create ‘residents’ that socialize, create, and trade virtual products like real estate or fashion, transport Veblen’s concept of conspicuous consumption into the realm of sheer simulation and imagination. The recent recession has curtailed the sales of many physical products, but the sale of virtual cultural products generated over \$1 billion in the US alone, with SecondLife reporting a 94% surge in virtual sales in 2009 (La Ferla, 2009). As this ‘world’ extends, consumers become virtual or electronic flâneurs (Benjamin, 1999; Featherstone, 1998) who browse and participate in cyberspace in ways that “radically enhances the perspicacity and mobility of the shopping experience” (Currah, 2003, page 13).

Yet, despite the ability of virtual worlds to redefine space and claims that production, consumption, and promotion are becoming placeless (Kelly, 1998), place is said to be more important than ever for inscribing meaning, and differentiating and enhancing the value of cultural products. The linkages between product and place, whether place of design, production, or consumption hold increasing meaning in the marketplace and as such have become the basis for marketing and value creation (Crewe, 2003; Harvey, 1996; Hauge et al, 2009; Jakob, 2009; Molotch, 2003). Jansson and Power (2010) demonstrate that fashion firms invest heavily in exclusive flagship stores to showcase their brand and provide opportunities to experience new collections. These showrooms must be located on the right

street to connect with the right set of consumers. Geographers have also argued that even virtual spaces need to be ‘localized’ and that they often reproduce rather than challenge geographic space (Aoyama and Sheppard, 2003; Pike, 2009). Although we agree with critics who point out the danger of assuming that ‘place matters’ universally, there are many studies that provide ample evidence to support this claim in specific contexts. In our own interviews with independent musicians and fashion designers operating in Berlin, New York, Toronto, and Stockholm, the majority of respondents indicated that place mattered to them as a source of inspiration and distinction. However, as we have explored this relationship in greater detail elsewhere (see Hauge and Hracs, 2010; Jakob, 2009), the discussion section below only aims to highlight the role of locality as a signifier of difference and source of value.

Ultimately, digital technologies have spurred the industrialization of cultural production, but consumer demand has also become reflexive, sophisticated, and volatile. This ‘hypercommoditization’ of culture (Currah, 2003) saturates the marketplace and makes it difficult to attract and retain the attention and patronage of fickle consumers. Indeed, fashion designers and musicians face direct competition from peers and amateurs as well as the spectre of low-cost knockoffs, counterfeit copies, and illegal and free replicas. With uniqueness and scarcity now entrenched as the basis for value, these producers are forced to find new ways to stand out in the crowd and garner monopoly rents (Harvey, 2001).

Exclusivity for everyone—towards solving the dilemma of democratization

To counter oversupply, producers have initiated what Goodman calls “a bewildering and counterproductive proliferation of competing quality schemes” (2004, page 10). The marketplace features products that are branded as ‘local’, ‘ethical’, ‘green’, ‘authentic’, ‘of quality’, ‘high performance’, etc (Gilmore and Pine, 2007; Jansson and Waxell, 2011; Lewis and Potter, 2010). As more labels are introduced, however, critics argue that the power of these claims and their ability to generate distinction and value is being eroded by ‘label fatigue’ (Goodman, 2004). Moreover, labels are diluted when firms adopt them without transforming the production process itself. Indeed, high-quality luxury goods compete with low-cost knockoffs and firms with legitimate fair-trade and ethical production practices compete with firms that only claim to be. Entine (1994) calls this scheme ‘greenwashing’ and finds that, for example, the Body Shop’s ‘natural’ products were in fact full of chemicals, artificial colors, and preservatives. Evidence of ‘unfair’ trading practices and fake charitable donations also challenged the firm’s ‘ethical’ reputation. Therefore, these competitive strategies to stand out have limitations and even strong proponents of authenticity concede that “nothing kills authenticity like ubiquity” (Gilmore and Pine, 2007, page 2).

Hence, luxury fashion firms generate scarcity by limiting both the volume and the location of where their products are sold (Moor, 2007). These producers have learned that, even though wider distribution is economically beneficial in the short term, there is a serious risk of undermining the value of the brand. When Burberry’s traditional check pattern was appropriated by American Hip Hop culture and British football ‘hooligans’, for example, the brand’s luxury status and overall value were diluted by counterfeiting, oversupply, and mass-market popularity [for a review of Burberry’s decline and reemergence as a top luxury brand see Pike (2009); Power and Hauge (2008); Tokatli (2012)].

Our aim is not to dismiss the potential importance or effectiveness of ‘green’, ‘ethical’, or other competing quality schemes but rather to suggest that they do not address the core challenge facing producers of cultural products. Instead of restricting supply and raising value, these strategies introduce labels and alternatives which contribute to oversupply and consumer confusion (Lewis and Potter, 2010). By contrast, exclusivity-based strategies are specifically designed to reduce supply and garner attention and value through scarcity. For just as Simmel observed in *The Philosophy of Money* ([1900] 1978), consumers desire objects

that are not merely given but attained by the conquest of distance, obstacles, and difficulties. Whereas consumers can verify the ethical and green qualities of products, exclusivity is more difficult to test. Consequently, as long as some consumers perceive a good, service, or experience to be exclusive and unique, they will pay more for it.

As mentioned, combining our findings revealed that the exclusivity-based strategies being used by independent musicians and fashion designers in Berlin, New York, Toronto, and Stockholm are similar in both logic and execution. To demonstrate these overlaps the paper provides a typology of three common mechanisms through which the cultural producers in our sample harness exclusivity to stand out in the crowd:

- (1) the individualization of production, consumption, and promotion;
- (2) the blurring boundaries between production, consumption, and promotion;
- (3) the relationship between space and exclusivity.

When each mechanism is discussed a small number of illustrative examples are also provided. These examples have been selected from a much larger pool of observations because they typify and highlight the practices that many of our 252 respondents described.

The individualization of production, consumption, and promotion

The imperative of individuality compels sophisticated consumers to avoid or subvert the mainstream and this desire can be harnessed by independent cultural producers. Many of the fashion designers we interviewed not only design unique patterns but also work with materials that are rare or difficult to replicate. A prominent example involves the use of recycled and reclaimed materials, such as former advertisement tarps and banners for the production of handmade bags and purses. Handmade or vintage buckles and clasps also ensure that items are ‘one of a kind’. It was common for designers in Toronto, Stockholm, Berlin, and New York to explain their choice to reuse materials as motivated by ethical values as well as part of a calculated effort to enhance the distinctiveness, scarcity, and value of their goods. For consumers the demand for handmade fashion items, and especially those made with vintage materials, is driven by the quest for individuality and an effort to avoid the ‘cookie-cutter’ fashion trends associated with global fashion chains (Tungate, 2004). Figure 2 depicts bags and ceramic buttons designed and handmade by a local indie producer in New York who refuses to sell these ceramic embellishments separately to maintain the uniqueness of the combination. Independent musicians also circumvent their mass-produced competition and generate value through traditional artisanal production techniques and exclusivity. In Toronto, Berlin, and New York it is common for independent musicians to produce handcrafted albums that feature hand-painted artwork, photographs of the band, poetry, individual numbering, and handwritten thank-you cards. These albums are marketed as unique products that contain layers of value not offered by digital downloads or mass-produced CDs.

The founder of a prominent Toronto-based indie record label provides a good overview of the strategy:

“People want to be part of the club [and] they want to have the limited edition stuff We have done releases in vinyl, which had been hand numbered. We offer hand etchings on the fourth side of the vinyl and add additional or extended tracks. It ends up being a package that you wouldn’t normally see. It is not a mass-produced package and with all of the handcrafted detail we only issue about 300 units. We take it on the road and sell it for [CAD]\$25 instead of \$15 so we are selling them for a premium. When people start talking about the limited edition albums you get some buzz going and it helps promote the album and the live show. People start saying ‘I was one of the few to snag this new cool album.’ I think all of this exclusive content is a reaction to what is happening in the market.”



Figure 2. [In color online.] Handmade designer's bags from recycled materials and with handmade ceramic buttons.

While selling a deluxe version mitigates the popularity of single-track purchases outlined by Anderson (2006), indie musicians emphasize the limited number of units that are produced and available (often below 500). This practice allows musicians to turn their inability to afford larger production runs into a source of value. As Shipman (2004) points out, consumers are willing to pay a premium for scarce products because of the select company owning these products puts them in. Thus, consumers must display high levels of cultural and social capital to find and obtain unique products and limiting supply allows indie producers to generate distinction and value.

The blurring boundaries between production, consumption, and promotion: 'where did you get that?'

With the recent advancement of crowdsourcing (Howe 2006) the boundaries between producers and consumers are blurring (Grabher et al, 2008). As Potts et al argue, "consumer co-creation is a redrawing of analytic boundaries, such that production processes now extend into domains previously understood as consumption processes" (2008, page 462). By involving consumers in the production process, producers are able to generate exclusivity and value for specific products. In Toronto, Stockholm, Berlin, and New York, independent fashion designers use the concept of cocreation to generate additional revenue streams and brand loyalty. In addition to selling their own designs, they host workshops where consumers pay for the materials, training, and experience of making their own clothing. One Toronto-based fashion designer described these workshops as a strategic extension of the 'do it yourself' ethos.

Similar examples of cocreation and exclusivity can also be found in music. In one illustrative example, an informant in Toronto described a bold strategy to generate value through a new form of world tour. Instead of targeting big venues and thousands of consumers at a time, this musician is playing exclusive 'salon' style shows that are limited to twenty-five people.

Using their website, this musician interacts directly with fans to arrange small private shows at the houses of fans and charges around CAD\$30 per ticket. The fans are invited to arrange the space and contribute to the actual performance by requesting songs and singing along in a very small and intimate setting. According to media reports, this strategy has been very successful and the musician has toured across New Zealand, Australia, and the United Kingdom. The private and interactive house show differentiates the live performance from those of other independent musicians and mass-market tours. As such, this musician is able to earn over \$500 a night, which is impressive given that the majority of the musicians we interviewed in Toronto reported that because of high levels of competition it is difficult to earn more than \$50 for a live performance.

Cocreation is also extending to copromotion whereby consumers actively help to brand and sell specific products through face-to-face demonstrations, endorsements or full-blown social media campaigns (Tokatli, 2012). Such involvement can be attributed to the desire to attach personal narratives to consumption behavior and to enhance the cultural and social capital of consumers. Indeed, the cultural capital associated with being the first to discover a new band or designer can only be converted to social capital when that discovery is shared with others (Jaramillo et al, 2001). To harness the willingness of consumers to take cues from artists and other creative individuals independent producers encourage and incentivize their fans to ‘spread the word’.

In fashion some of the designers we interviewed described a ‘living billboard’ strategy where free clothes are given to selected individuals with local prestige and credibility such as bartenders and musicians (Hauge and Hraes, 2010). Unlike endorsement deals between global firms and celebrities, this form of promotion involves bartering and is limited to the local scale. As one respondent explained:

“All the bartenders and waiters at [popular Stockholm club/restaurant] wear our shirts and that is no coincidence. We have never done a press release or a traditional campaign but people are still talking about our stuff.”

In this example, indie producers employ a much cheaper and localized marketing campaign that is successful because of the cultural and symbolic value of the producers and brand ambassadors.

For many of the independent musicians we interviewed, enlisting the help of fans was a vital strategy to overcome their limited economic and labor resources. Whereas remix contests help to build loyalty, promotion contests exchange free labor for exclusive content. This free labor is supplied by a range of individuals including fans, ‘hipsters’, and ‘want-to-be bohemians’ who are willing to trade their time, energy, and money for the social and cultural capital that volunteering on a creative project grants them (Bourdieu, 1984; Thornton, 1997). Bands will ask their fans to sell a certain number of tickets for an upcoming show and then award the most successful fans with backstage access or free exclusive content.

The illustrative examples in this section highlight the ways in which the independent cultural producers in our sample generate attention, value, and loyalty by granting consumers access to the production and promotion process. They also hint at how physical (workshops and performances) and virtual (promotion) spaces can be manipulated to generate exclusivity, a theme that we consider in more detail in the following section.

The relationship between space and exclusivity: ‘are you cool enough to be in here?’

Retail geography has come to occupy a central position within the discipline and increasing attention is being paid to the spaces, places, and practices of consumption, circulation, and exchange (Crewe, 2003; Jansson and Power, 2010). From cultural complexes and festivals to place making, tourism, and gentrification, cultural production and consumption are rooted in space and place (Evans, 2003; Zukin, 2010). Public spaces are being transformed into

privatized ‘consumption’ spaces and economic elites seek to “provide a package of shopping, dining and entertainment within a themed and controlled environment” (Gotham, 2002, page 1738). Geographers have considered how consumption spaces are produced, governed, and used, but the relationship between space and exclusivity can be further unpacked. There is a need to move beyond the examination of flagship stores and large-scale urban redevelopment to consider how independent producers manipulate and benefit from physical and virtual spaces in much less expensive ways. In line with Currid (2007), who argues that fashion shows, music venues, and art galleries are pivotal social settings that valorize cultural products and the identities of audience members, indie producers intentionally limit access to physical spaces such as parties, clubs, and sales events to produce scarcity as well as social and cultural capital. This observation is underpinned by the considerable body of work on subcultures that examines how members of subcultural groups position themselves as alternative to the mainstream and use the exclusion of outsiders to generate subcultural capital (see Gelder and Thornton, 1997; Muggleton and Weinzierl, 2003).

In Berlin the online retail platform for indie designers DaWanda.com organized an exclusive promotional event for handmade items (DaWanda, 2011). For the first DaWanda Kreativmarkt, designers had to compete for a limited number of exhibition opportunities—a strategy that is not only increasingly used in our case studies but internationally (see Shultz, 2011). DaWanda also restricted the number of consumers who were allowed into the building leading to a line of over a thousand people. The willingness of people to wait for 1.5 hours in heavy wind and rain generated buzz from onlookers. When we asked people about the line they explained, echoing Simmel, that overcoming the obstacle created a greater sense of satisfaction and exclusivity.

Secret music venues, secret bars, and secret dance clubs are popular spaces of nighttime consumption. In the United States, secret places resurrect nostalgic memories of prohibition for some, but in New York the ‘allure’ and ‘vibe’ of the secrecy and exclusivity provide the attraction (Grimes, 2009). To create and fuel this myth, many venues eschew signage and require secret passwords from their patrons. In some cases managers verify the authenticity of the code word or invitation before granting access. By embracing the secret place concept and restricting access, club owners enhance the exclusivity, cachet, and symbolic value of their events and allow their customers to feel special. Indeed, according to Jaramillo et al (2001), gaining access to a club allows individuals to benefit from the collective good supplied in the place and from the social and cultural status ascribed by society to its members. We found similar venues in Berlin and Toronto, including an experimental jazz club located in a difficult-to-find industrial unit next to a furniture showroom. According to the owner, this venue in Toronto was designed to offer a small, intimate, and exclusive setting with no separation between performers and audiences:

“We can only fit about 50 people in here for a show so it is destined to be a word of mouth space. The venue is somewhat difficult to find so there is some exclusivity ... I present the music and the space as an alternative to whatever the mainstream is I attract people who are looking for an alternative and it is that curiosity that will compel somebody to find this space.”

Secret places represent an additional layer of geography in which economic capital is trumped by the social capital of ‘who you know’ and the cultural capital of ‘what you know’ (Bourdieu, 1984; Currid, 2007). The mystique and exclusivity of these spaces can generate buzz and value but maintaining this status can be challenging. Once secret spaces become exposed and popularized they usually lose their cachet and local pressures of gentrification can also reduce the short lifecycles of these establishments [for a review of these tensions see Zukin (2010)].

While secret clubs can literally restrict access and insiders can visually verify their exclusive membership, these strategies must be amended for use in online environments. As Currah (2003) points out, in cyberspace the power dynamics have been reworked and producers must deploy new methods of display to entice consumers. In virtual spaces new rules are being forged between producers and consumers and pioneering producers are replacing 'real' exclusivity with 'imagined' exclusivity.

For musicians simple websites that promote traditional products like recorded music and live performances are evolving to include virtual products and exclusive experiences (Denegri-Knott and Molesworth, 2010). Websites provide platforms to attract, reward, and stay connected with consumers and in many cases bands will provide an option to join an exclusive fan club for free or for a small fee. In so doing musicians encourage consumers to keep purchasing their songs, in physical or digital formats, and attending their live shows by offering them bonus items that nonmembers do not get access to. Box 1 shows text from a screenshot that provides an illustrative example of what many indie bands in Toronto offer fans who are registered members of their websites. Although consumers can never be sure how exclusive virtual spaces and digital content are, their willingness to believe constructed myths suggests that imagined exclusivity is a powerful promotional tool.

Box 1. Exclusive content in physical and virtual space (example from the website of one of our anonymous respondents).

Here you can sign up for our E-Team/Mailing List as well as find out about fan exclusive content. By signing up for this you'll get Mailing List updates as well as gain access to Fan Exclusive content offered only on this site! Our exclusive fans get access to all kinds of great stuff like:

- * A FULL preview of the new record (not yet released)
- * Stems for your OWN REMIX of [song title]!!!
- * Exclusive demo material no one else gets to hear
- * Live and acoustic performances of all kinds of material
- * Free Downloads of songs and videos
- * Exclusive Desktops, Banners, Avatars and Images
- * Access to Behind the Scenes footage and pictures of the band
- * Downloadable Music Stems of our songs to make your own remixes
- * Leaving comments and messages to the band

For the independent cultural producers in our sample, place matters. These musicians and fashion designers draw inspiration from specific and localized scenes within Berlin, New York, Toronto, and Stockholm; link specific products to those spaces; and construct spatially entangled brands that attract consumers and generate additional value. Branding products as from 'New York' or 'Toronto', or better still 'Williamsburg' or 'Queen West', provides a spatial signifier of cutting-edge consumption and differentiates them from those produced in the periphery (Hauge and Hrats, 2010; Jakob, 2009). Independent fashion designers in Berlin who organize themselves under the label 'Create Berlin' offer an illustrative example of this practice. These designers showcase their products collectively at international events called 'Best of Berlin' or 'Made in Berlin' to singularize their products through geographic alignments. Thus, while location can influence aesthetics (Molotch, 2003), 'Made in' branding helps to attract certain consumers and provides categories to evaluate and curate products (Jakob, 2009). We also found that, because spatial affiliations are based on positive perceptions of place, cultural producers, willingly or not, work together to collectively brand and promote cultural scenes and cities. These findings echo and support existing studies that champion the importance of place as a source of meaning and value. Like Jansson and Power

(2010), however, our findings demonstrate that origin branding is not enough on its own and must be incorporated into a more complex scheme of differentiation.

Discussion: copying and curating cultural products and strategies

Although this paper provides a snapshot of the strategies our respondents are using to stand out, hypercompetition forces cultural producers to constantly refine and hybridize their competitive strategies. Global firms such as Prada and Sony and local indie producers monitor each other for new product and marketing ideas. Our research suggests that this knowledge flows across cities, scales, and industries and that firms, regardless of size, are not above copying. To provide one illustrative example, the remix contest and exclusive online space used by the band depicted in box 1, was adapted from strategies pioneered by global bands Radiohead and Nine Inch Nails. In fact, the indie band met Trent Reznor of Nine Inch Nails by winning a fan contest and had the opportunity to learn from one of the leading innovators in the digital era. Respondents at both scales, ranging from indie producers to executives at major record labels and fashion houses reported posing as consumers in physical and virtual retail environments to gather information about fresh visual and sonic styles. Informed by Hodkinson's (2004) work on translocal Goth scenes, we found that fashion designers from Berlin and Stockholm travel to New York to promote their own products while at the same time learning from other designers. Similarly, we found evidence that when touring, nationally and internationally, musicians are not only discussing social and creative topics with others but using encounters with other musicians to learn about new competitive strategies [Hrac et al (2011); see Jakob (2013) for fashion designers]. Competition thus intensifies the importance of networking and monitoring local buzz but also produces a fear of creative and strategic theft that serves to pit cultural producers against one another and reduce their willingness to share information, ideas, and support.

In addition to exploring how producers differentiate their offerings, it is equally important to consider how sophisticated consumers find trustworthy ways of evaluating products and deciding what to buy. We might ask what channels do indie producers use to certify and create attention for their products and what role do producers, consumers, and intermediaries play in the curation process? While adequately addressing this topic is beyond the scope of this paper, we can highlight some of the trends we discovered during our research.

From films to art, commodified forms of cultural products, are typically legitimized, certified, and promoted through formal channels of curation. These channels are driven by spaces, events, and key intermediaries who act as experts, tastemakers, and brokers (Becker, 1982; Currid, 2007). At this end of the spectrum, interactions and choices are mediated by trust and the system is very exclusionary (Thornton, 2009). In physical and virtual spaces gatekeepers act as mediators between consumers and producers and help drive the knowledge-distribution process (Denegri-Knott and Molesworth, 2010). At the independent end of the spectrum, the flows of knowledge are more democratic but low barriers produce an oversupply of opinions and the need for trusted curators is arguably even greater. Our research indicates that curation occurs in a range of spaces. In physical spaces, such as local fashion boutiques and record shops, owners and clerks with high levels of cultural and social capital draw on a wealth of accumulated knowledge (Leslie, 2002). As in the case of retro-retailing and alternative consumption (Crewe et al, 2003), these clerks interact with customers directly to help them decide what clothes or music to buy depending on their tastes. Despite low levels of economic remuneration clerks are valued members of local scenes because they are trusted intermediaries. As Thornton (1997) argues, people in these roles often enjoy a lot of respect not only because of their high volume of subcultural capital but because of their role in defining and creating it.

While clerks curate products through face-to-face interactions in physical spaces, the Internet facilitates the evaluation and curation of cultural products in a range of virtual spaces. Chief among these are the scores of new fashion and music blogs that aim to help consumers filter out the noise and zero-in on ‘hot’ new products (Penn, 2009). On the Internet, however, low entry barriers—a Google search provides millions of hits for ‘music blog’ or ‘fashion blog’—and the absence of traditional gatekeepers and formal institutions creates a parallel level of saturation and consumers do not know which sites to follow and trust. So who curates the curators? Sophisticated consumers focus on word of mouth and blogs from trusted members of their network, but less savvy consumers may become overwhelmed with the infinite choice of products and recommendations. This might explain why firms still pay big money to promote their products on the front page of iTunes and Amazon and why Elberse (2008) found that blockbusters still dominate the market in the age of the ‘long tail’. Clearly, more research is needed to tease out the evolving dynamics of curation but, despite the power of the Internet to distribute information and MP3s, we believe that virtual channels of curation compliment rather than replace physical channels. Consumers may narrow their options and learn from blogs, but they still enjoy visiting local record shops and fashion boutiques to discuss things face-to-face and there is still a desire to handle vinyl albums and to touch and try on articles of clothing.

Conclusion

In the contemporary marketplace declining entry barriers, intense competition, and volatile demand undermine the ability of cultural producers to garner monopoly rents from their ‘unique’ goods and services. This paper contributes to the existing studies in geography that consider how global firms compete with capital-intensive strategies by focusing on independent cultural producers who operate at the local scale. By combining data from 252 interviews with independent musicians and fashion designers in Toronto, Stockholm, Berlin, and New York, this paper demonstrated how these producers harness highly spatialized notions of exclusivity to generate attention, distinction, and value.

After outlining the causes of the ‘dilemma of democratization’, the paper provided a typology of three common mechanisms through which our respondents generate exclusivity. The first involves tapping into the demand for unique, rather than mass-produced, products. This can be achieved through customization and the use of recycled materials and artisanal forms of ‘handmade’ production. The second involves enrolling the consumer into the production or promotion process. In our examples consumers participate in fashion workshops and interactive musical performances and serve as living fashion billboards or online concert promoters. In these cases, consumers are willing to pay a premium for the experience of actively participating in the creative process. The third mechanism involves the manipulation of physical and virtual spaces. Our research reveals that indie producers cultivate exclusivity by restricting and granting access to physical and virtual spaces including secret music venues, fashion events, and online domains such as fan forums and blogs. The paper also highlighted that place matters for independent producers who draw inspiration from cities and scenes and use spatial linkages to distinguish themselves and their products. Ultimately, many of these strategies are used because of their affordability. Unlike expensive global marketing campaigns and flagship stores, exclusivity-based strategies allow indie producers to construct interactions where consumers are willing to exchange economic capital to enhance their social and cultural capital (Bourdieu, 1984).

Despite the promise of exclusivity, there is, however, a danger of romanticizing the economic effectiveness of these strategies. To be clear, for many of these workers success is not necessarily about attaining great wealth or global stardom but rather the difference between engaging in cultural production on a part-time basis—while working additional

jobs to pay the bills—or full-time. As the literature on the precariousness of creative work highlights (Banks, 2007; McRobbie, 1998), these workers face a battery of risks and challenges including self-exploitation, temporal and spatial fragmentation, and extremely uncertain and low incomes. For instance, in 2006 musicians in Toronto earned average annual incomes of \$13 773 which places them below the ‘low-income cut-off’ of \$20 778 (Hrac et al, 2011). Above all, many independent cultural producers prioritize their creativity and autonomy over their physical, economic, and social well-being. Therefore, although our research suggests that independent cultural producers who harness exclusivity may have a better chance of becoming economically self-sufficient and being creative full-time, the majority are destined to fail (Banks, 2007). Indeed, in her critique of the ‘long tail’ Elberse (2008) argues that, despite the promise of democratization, hits remain dominant and independent cultural producers will still find it difficult to make money from niche products.

Ultimately, the endless cycle of surveillance and piracy across space, scale, and industry appears to exacerbate the ‘dilemma of democratization’. Just as digital technologies simultaneously enable *and* offer solutions to the dilemma, competition and the search for scarcity lock producers and consumers into a never-ending cycle of discovering and discarding sources of uniqueness and value. As Molotch argues, “once others gain access to what you have, new stuff has to be acquired in an endless cycle of unhappy waste” (2003, page 4). Paradoxically, the perpetual search for undiscovered products, experiences, and meaning only enhances the uniformity of cultural content and the individuals who consume them (Horkheimer and Adorno, 1972). In conclusion, although exclusivity-based strategies and the spatial processes that underpin them are vitally important to how independent cultural producers negotiate the contours of the contemporary economic landscape, the expectations of their effectiveness must be tempered. As more resources are reallocated from production to marketing, we submit that future research should examine the sustainability and ongoing effectiveness of exclusivity as a means of artificially limiting the supply of cultural products and source of symbolic and economic value.

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