

GFFC Global Footwear Future Coalition

A FORUM FOR KNOWLEDGE EXCHANGE

SYMPOSIUM Launch Overview
9 October 2024

BRINGING THE INDUSTRY EXPERTS TOGETHER

The Global Footwear Future Coalition (GFFC) symposium marked the inception of a new global community of practice for the footwear and related industries.

Hosted and supported by leading business and digital transformation agency, Gate One, the event took place in the heart of the King's Cross Knowledge Quarter. It brought together a wide range of industry leaders and specialists to tackle pressing challenges and emerging opportunities, laying the foundation for the future of footwear.

Over 120 participants, including CEOs, non-executive directors, technical experts, designers, material scientists, retailers, and academics attended the day-long symposium. The event provided an invaluable platform for sharing knowledge and supporting collaborative discussions.

To ensure maximum engagement and productivity, the symposium featured a carefully structured agenda. The morning was dedicated to plenary talks, while the afternoon focused on interactive working sessions that encouraged deeper exploration of critical topics. The symposium received overwhelmingly positive feedback, with attendees praising both the relevance of the content and the event's engaging format.

This document synthesises the key questions and insights that emerged from the GFFC launch, reflecting the collective expertise and perspectives shared by this global gathering of industry professionals.





AGENDA RECAP: MORNING

Plenary sessions with leading figures in footwear

OPENING KEYNOTE

The Past and Future of Footwear

Daniel Rubin

Executive Chairman, The Dune Group

PANEL 1

Re-approaches to Design, Materials, and Consumer Knowledge

Asher Clark

Chief Design Officer, Vivobarefoot

Jamie Hall

Co-Founder, Pentatonic

Jack Millington

Founder, Billy Tannery

Susan Postlethwaite

Director, Robotics Living Lab, Manchester Fashion Institute

Chair: Yasmin Jones-Henry

Contributor, Financial Times; Curator, The Lab E20

PANEL 2

Equitable Responses to Cultural Shifts

Mark Whelan

UK Chairman & Global CCO, Havas

Bob Neville

Retail industry leader (ex-Clarks, Under Armour)

Jen Keane

CEO, Modern Synthesis

Tansy Hoskins

Author, Foot Work – What Your Shoes Tell You About Globalisation

Chair: Elisa Annis

Contributor, Financial Times; Assoc. Lecturer, London College of Fashion

PROVOCATIONS

Nicola Pichel-Juan

SATRA

Sarah Day

Education and Footwear Consultant

David Allen

Zen Running Club

Catherine Willems

Footwear Future Foundation

Joyce Addai-Davis

Addai-Davis

Andrew Thompson

Design Thought Leader, Podcast Founder

KEYNOTE: DANIEL RUBIN FOUNDER, DUNE GROUP

At the launch of the GFFC, Daniel Rubin delivered a keynote reflecting on the footwear industry's past, present, and future challenges –

We share his insights on the Footwear Industry



Scale and Market Dynamics - Footwear accounts for \$400 billion of the \$1.8 trillion global fashion market, illustrating its significance within the sector.

Historical Roots - With origins tracing back to at least 8000 BC, footwear possesses a mythical resonance, symbolizing beauty, transformation, and cultural storytelling—seen in tales like *Cinderella* and *The Wizard of Oz*.

Manufacturing Evolution - Innovation has propelled some segments, while others remain reliant on processes unchanged since the postwar period, reflecting stagnation in adapting modern techniques.

Casualisation Trends - The 2020s have marked a shift towards trainers and casual footwear, driven by the growing casualisation of workplaces and lifestyles.

Daniel emphasised the urgency for collaboration across the industry to meet these challenges and seize opportunities for meaningful innovation.

Globalisation and Fragmentation - Globalisation has fragmented the industry, diluting skilled design and production expertise in Western markets. Specialist buyers are being replaced by generalists, further weakening depth in footwear knowledge.

Sustainability Challenges - Sustainability is paramount as consumers demand eco-friendly, affordable footwear. Gen Z champions genuine practices but remains skeptical of greenwashing. Despite material and energy advances, fundamental shoemaking challenges persist. Educational efforts must target both creators and consumers to foster impactful change.

The Role of Government- Governments can drive sustainability by incentivising green materials and manufacturing. Policy support could be key in transforming the industry's environmental footprint.

PANEL 1

Overview:

This Panel took the opportunity to explore and interrogate the **emerging sustainability solutions** and **circular and regenerative business models**. Their discussion centred on three main themes: **terminology and definitions**, **preserving heritage** crafts while fostering circular innovation, and promoting cultural sustainability.

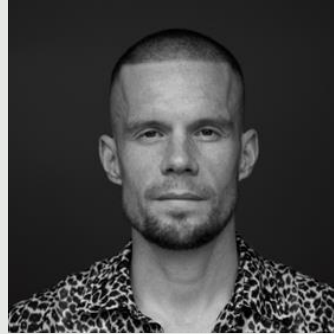
“Footwear is the last bastion of complicated industrialisation.”
Asher Clark

Re-approaches to Design, Materials, and Consumer Knowledge

Panellists



Asher Clark
Vivobarefoot



Jamie Hall
Pentatonic



Jack Millington
Billy Tannery



Susan Postlethwaite
Manchester Fashion Institute

Moderator



Yasmin Jones-Henry
The Lab E20

Key insights:

Defining Circularity & Regenerative:

Inconsistent environmental and ethical standards across the industry complicates defining terms like ‘circularity’ and ‘regenerative’.

The language surrounding sustainability is frequently framed in a negative light, emphasising the challenges faced by the industry

Reframing to positive messaging encourages more constructive consumer changes and engagement.

Materials, Craft, Heritage & Innovation:

It is important for us as an industry to conserve our craft whilst employing emerging innovations

Current manufacturing processes are slow and wasteful by design. Reimagining manufacturing and factory processes to transition from subtractive to additive process is crucial for a more sustainable future

Investing in technologies such as robotics will revolutionise footwear manufacturing, supporting a more circular product lifecycle that emphasises both creation, disassembly, and small, high quality, local and potential more ethical production.

‘Doing it For The Culture’:

ESG measures the impact on society, environment, and transparency. While much attention is given to the environmental and governance aspects, the social component often receives less focus

Education through a culture of continuous learning is crucial for driving change. Prioritising workforce upskilling framed through lifelong learning is essential to adapt to rapid contemporary and future challenges.

Consumers, increasingly aware of greenwashing, are sceptical of brand education efforts. To build trust, brands must highlight transparency, offering open and honest information about practices and products, aligning their values with actions.

PANEL 2

Overview:

This Panel explored how the footwear industry can **navigate cultural shifts** and **embrace sustainable, equitable practices** at the intersection of designing, making, communicating and distributing products that meet the needs of a changing global system.

Themes emerged on **ethical business practice, innovation and retail experience**.

“If you don’t have a story, all you have is price and that’s a downward spiral.”
Bob Neville

Equitable responses to cultural shifts

Panellists



Bob Neville
Ex-Clarks, Under Armour



Mark Whelan
Havas



Tansy Hoskins
Author & Journalist



Jen Keane
Modern Synthesis



Moderator

Elisa Annis
London College of Fashion

Key insights:

Workplace safety and ethical practices:

Ethical practices must be prioritised throughout footwear value chains.

There are enduring issues with how workers, their communities and the environment are treated in supply chains.

The heightened consumer focus on ethical practices will demand changes in behaviour and engagement.

Making Innovation work for good:

Sustainable innovators, especially materials sciences, are constrained by the costs & risks of scaling their innovations.

High costs and risks associated with developing new sustainable materials hinders growth. Additionally, patterns across industry often do not align with the long-term commitments that innovators need to secure investment, slowing down the scaling process.

Emerging technologies, such as generative AI, present both opportunities and risks when applied to real-world scenarios. While these innovations can drive systemic change, they also have substantial impacts on global perceptions and trust in the industry.

Organisations must manage these technologies thoughtfully to maximise benefits while mitigating potential downsides.

How retailing can respond to change:

There is a risk that footwear retailers get lost in internal metrics and perspectives, missing the real needs of their consumers and stakeholders.

Many of the inhibitors of adapting to a changing system is simply outdated retailing practices, for example missing opportunities to reduce emissions and costs by improving retail fit-out practices.

Responding to a changing global system goes beyond the shoes; it includes the retail system and how sustainable practices are embedded within it.

PROVOCATIONS *3 minutes to share ideas*



Nicola Pichel-Juan
SATRA

Imagine if legislation could create a level playing field for the footwear industry?



Joyce Addai-Davis
Addai-Davis

What if we could incorporate the disassembly process of a shoe from the design stage? And imagine if we considered and respected the final destination of our waste?



Sarah Day
Educator and Footwear Consultant

What if brands could future-proof the industry by supporting an early years creative education that improves health, wellbeing & 'creative elasticity'?



David Allen
Zen Running Club

Imagine if we could create a system where we start with a plant, turn it into a product, and then return it to plant form once again.



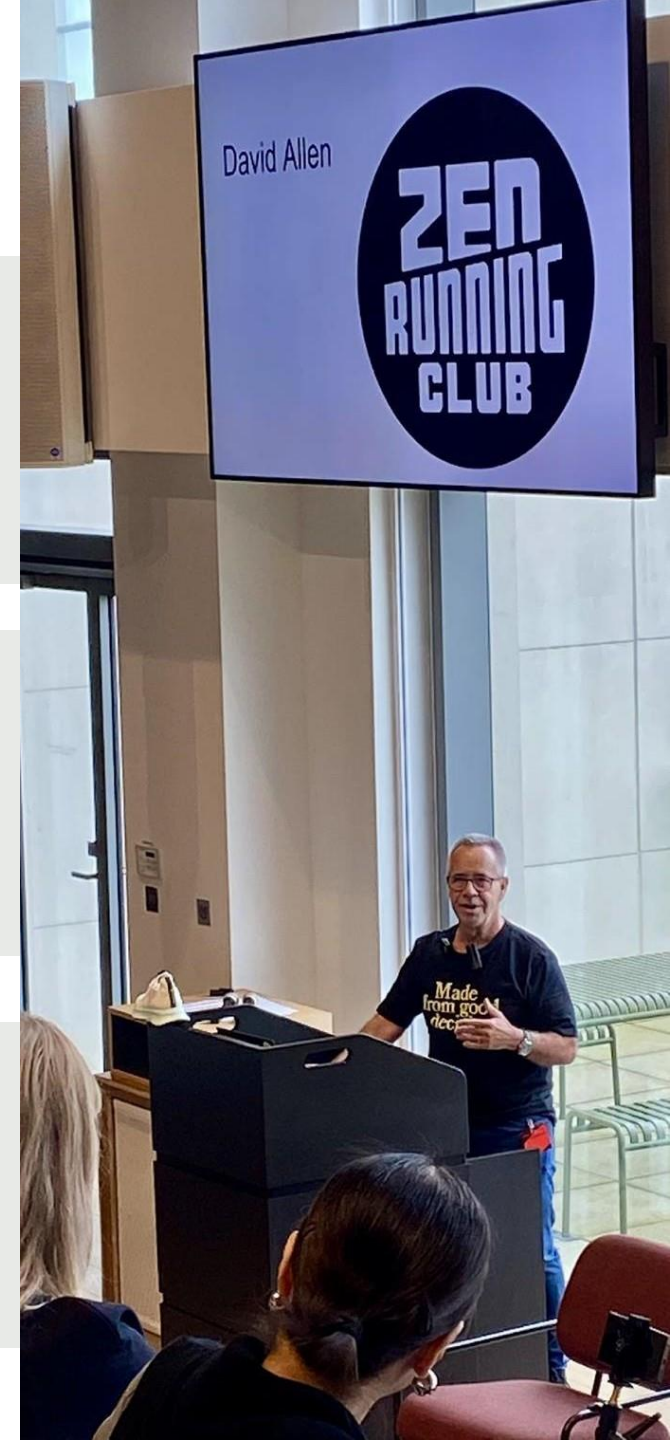
Catherine Willems
Future Footwear Foundation

Suppose the footwear industry could learn from indigenous shoemakers and what if we could restore land to Indigenous communities?



Andrew Thompson
*Design Thought Leader,
Podcast Founder*

What if brands create spaces - both physical and digital - that support collaborations with consumers around social issues?



AGENDA RECAP: AFTERNOON WORKSHOPS

Working sessions making the most of GFFC launch participants' time together



Learning, Knowledge Sharing & Industry

Examining how contemporary learning frameworks can provide the skills and knowledge to equip future teams, organisations and consumers



Design & Materials Ecosystems

Ideating how we achieve best practice across the footwear value chain to de-homogenise footwear and create truly sustainable products that consumers want



Consumers & Culture

Discussing how cultural sustainability can help us achieve authentic and meaningful propositions, consumer loyalty and a healthier corporate culture



Business & Transformation

Exploring the root causes of complex and systematic challenges in the footwear industry and their implications for the future of business

Learning, Knowledge Sharing & Industry

Workshop overview:

This workshop focused on future approaches to learning and considered ways to develop and support best practice in the footwear industry across the value chain answering the question:

How can contemporary learning frameworks provide the skills and knowledge to better equip future teams, organisations and consumers to understand the complexities of the footwear lifecycle to support best practice in the industry?

Insights:

Future Industry

Sustainably rooted – integral in shaping design, production, materials, ethics, and team collaboration across the value chain.

Interdisciplinary and collaborative - teams working fluidly across disciplines, breaking silos to share knowledge and innovate.

Technology-enhanced and human-centric - leveraging technologies to optimise processes, whilst people focus on creativity, craftsmanship, and strategic thinking.

Circular and desirable workplaces - Factories will make and unmake what is needed, embracing circularity, transforming waste into resources, prioritising employee wellbeing and merging craft and technology, creating environments where skills are valued, and people thrive.

Future Teams

Dream teams of the future will synthesis diverse knowledge and skills, bringing fresh perspectives to solve complex challenges and include: -

Visionaries with inherent skills of curiosity, creativity, trust, empathy, and strong communication driven by a commitment to circularity and sustainability in all forms.

Storytellers who connect the industry more closely with diverse consumers, increasing knowledge and inspiring future talent.

Creative collectives where science, technology and creative design merge, to make the connections between materials, systems thinking and design

Applied scientists, software developers, engineers, agriculture and aqua culturalists create technology to revolutionise manufacturing methods and processes

Production and sourcing specialists driving regenerative practices and ethical sourcing throughout the supply chain.

Hybrid creatives supporting a human-centric approach for digital technologies, connecting data analysis, AI, creative design, and traditional craftsmanship.

IP Experts - facilitating the sharing of knowledge and supporting both collective and individual creativity through secure intellectual property management.

Senior Leaders, with the vision, knowledge, and bravery to imagine the industry beyond efficiency and productivity, placing a multidisciplinary approach, wellbeing and planetary health at the centre of business resilience.

The Ecosystem

Empowerment through education - storytelling to build literacy around circular and sustainable futures, and empowerment through options - (repair culture, recycling, buy-back programmes, hire, extended and end-of-life options.)

Transparency and open communication- building trust through lifecycle visibility, circular practices, goals, challenges and disposal.

Co-creation and consumer involvement- engaging in the creative process to understand and inform design, sourcing, customisation, reparability and end-of-life solutions.

Feedback loops - creating channels for active listening and consumer engagement.

Academia/Industry Partnerships - academia as a pre-competitive convening space for innovation, bringing research and practice together and co-creating learning to develop talent with diverse skill sets.

Community engagement – revival of spaces through footwear placemaking, building back communities, through collaboration, local manufacture and retail spaces re-imagined as skills hubs.

FROM CONCEPT TO END OF LIFE: WHAT WE NEED TO KNOW



Teams	Paid apprenticeships (classroom skills are not industry skills) Mentoring and role swapping	Local knowledge, understanding consumers and materials at a local level What our customers need	Disassembly , considered from the start Early commitment to raw materials Clear vision , aligned to the strategy	Embedding extended testing time for new materials Stock management of spare parts for repairs. How to leverage partnership in the supply chain	Scaling made-to-order to reduce stock Localised production and distribution Awareness of different business models	Understanding where waste is localised Logistics of afterlife and extended life Materials knowledge	Universal labelling for materials Sustainability regulation and its impact Ethical considerations and implications of climate emergency
	Effective on the job training to de-mystify processes and remove siloes How to appeal to and engage with a new generation (under 11s)	Sharing the “ why ” with workforce and consumers Technology innovation & best practice What consumers want and what they should want	What is our design ethos ? Best practice in sustainable product testing	Minimising waste, toxicity, emissions and pollution in the supply chain Which manufacturers are open to new materials and processes	Customer interactions and how they want to buy (via time on the shop floor) Which outlets match our future retail strategy	Embedding End of Life options into the full cycle Intra-industry collaboration on afterlife	Impact of local sourcing and ability to deliver Embedding continuous learning, wellbeing and safety in our workforce Value of strategic/cross sector partnerships Ethics and climate emergency
Consumers	Brand knowledge – what are their values and ethos? Product passports – what am I buying and where do products end up?	Use of consumer data to optimise Reducing overproduction and returns ,personalise product offerings, improving inventory management	Sustainable design , what considerations do brands make? Transparency on the design and development process	Material choices , what, why and characteristics How footwear is made – the craft	Availability of rental and resale What goes into the price? Product locality vs globalisation	Value of extended life and afterlife How to repair, recycle and repurpose How waste impacts land and people	Who is in the innovation space. Ethical considerations and implications of climate emergency

The Questions

1. What are the key requirements for developing and cultivating multidisciplinary teams?
2. How can we embed and promote lifelong learning as a catalyst for innovation?
3. How can consumer education build trust, promote knowledge sharing, and cultivate loyalty?



Design Innovation & Materials Ecosystem

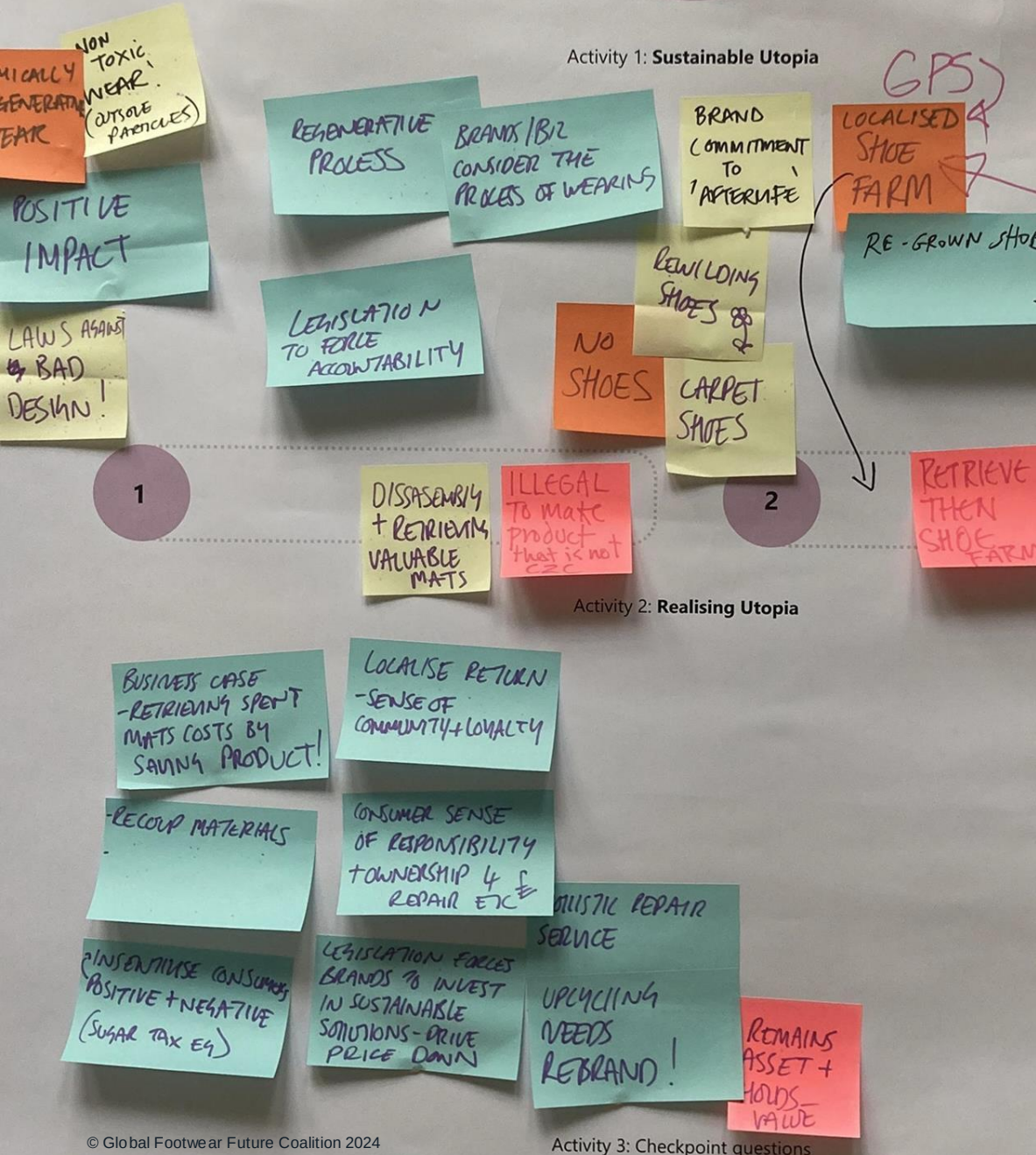
Workshop overview:

This workshop explored ideal approaches when materials ecosystem drives design choices. Interdisciplinary groups...

- interrogated sections of a footwear value chain
- defined most impactful initiatives
- discussed steps to realise 'sustainable utopias'
- noted challenges and checkpoints

asking the question:

What are the best practice approaches and choices to aim for when innovating footwear production?



Insights:

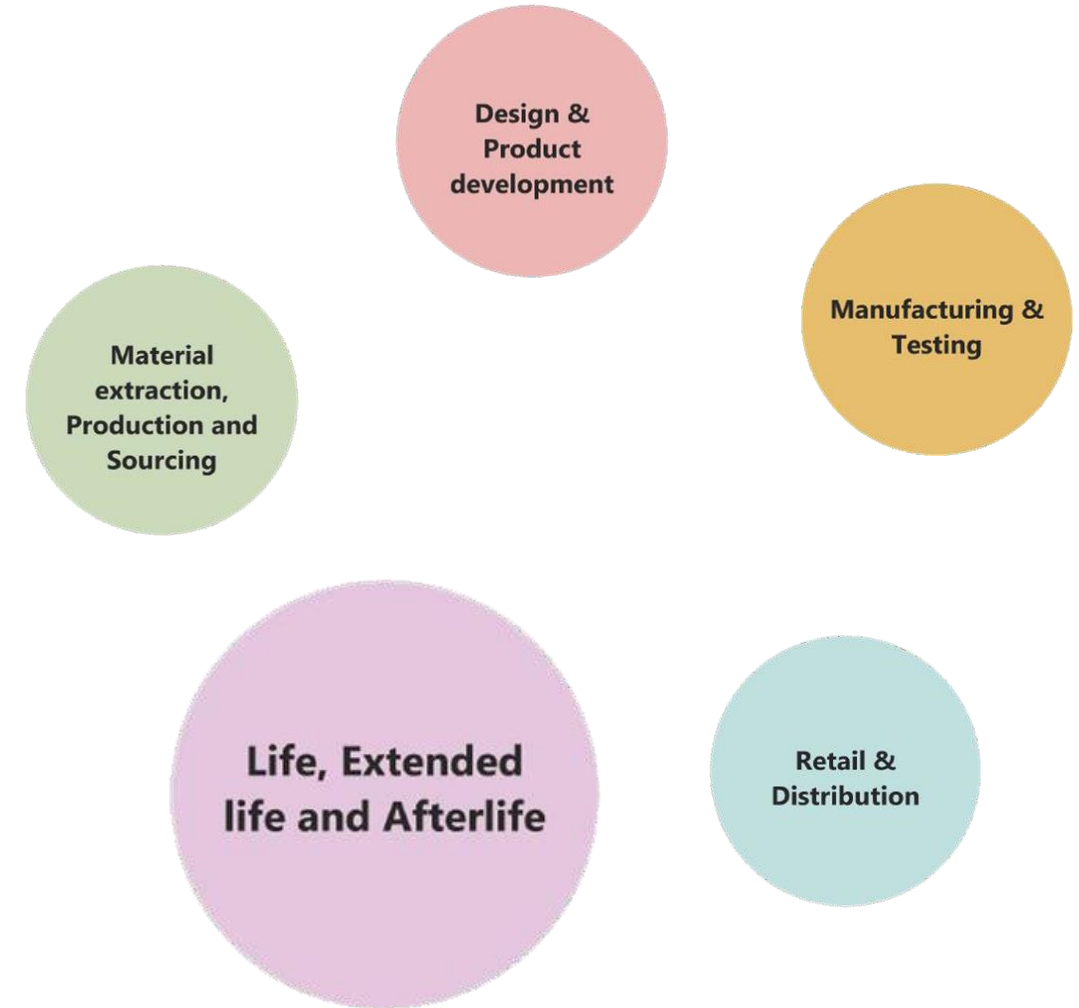
Reduce new production and invest in repair, refurbishment and data/ AI tech forecasting.

Biological and synthetic circular systems can be interrelated and mutually beneficial.

Transition production and manufacturing to local supply chains with circular systems that are zero waste and low impact.

We interrogated the concept of a linear value chain and identified alternative points of view. Key themes from discussion include:

- The entire value chain should be led by the vision for Life, Extended Life, and Afterlife.
- Organisations should not pursue any of the stages without first considering the strategy and execution of all the others.
- There are opportunities for circular practice across all stages of the value chain.



BEST PRACICES
DESIGN
INNOVATION &
MATERIALS
ECOSYSTEM



Ideal best
practice

Keep circular materials in same or higher value of loops

Safe & **local** manufacturing

Regenerative Agriculture

Close loop manufacture

Change the calendar - purpose driven/ changing priorities

interdisciplinary design more heads around the table

Stop making new stuff

Forget everything we know and **make from what we have**

Develop **localised supply chains**

Data forecasting (produce to fit demand/ use)

Zero waste - ecosystem and **repair in domestic setting**

Combining **AI** with **craftsmanship** and **open source**

Localised circular services

Technology enabled **made-to-order**

Storytelling and **transparency** in retail

Retail space to **afford community and circularity**

Accessible, low cost, low impact chemical **recycling**

Customisation (via repair as well) small vs full change, Second life material hub interacting with biological ecosystems

Disassembly and retrieval systems and services

Legislation to enforce C2C

Things to
consider

What's the tipping point for price parity?

What are cost implications, reputational risk, supplier reliability?

How to encourage brands for long-term investment?

How do we have a united vision for our purpose?

Do we need it, does it serve a purpose?

How do we align our priorities?

How do we regulate testing globally?

Where is our skilled labour coming from?

How do we KE, and is open source viable?

Do you know the upcoming legislation?

Do our services reflect our customer values?

Are we being authentic and transparent?

How to keep low cost and local?

Do users/ customers want this? How to make it democratic?

How much waste do we have as a company?

The Questions

1. How can we transition production and manufacturing to local, circular, zero-waste supply chains in footwear manufacturing? Who benefits and how?
2. How can biological and synthetic circular material systems be integrated for mutual benefit?
3. How can we redefine innovation to focus on repair and refurbishment, and how can technology (AI) facilitate this shift in manufacturing and in creativity?



⑤ Life, Extended Life & Afterlife



Business & Transformation

Workshop overview:

This workshop focused on bringing together current challenges our industry faces, mapping and prioritising the major issues across the footwear value chain and exploring root causes. Asking the question:

What strategies can businesses employ to effectively identify and address systemic challenges within the footwear industry?

Insights:

DESIGN RESTRAINTS:

End of life solutions are not considered at design stages. This is driven by tight timelines & pressure to produce commercial successes, stifling innovative designs and the ability to think outside the box.

MATERIAL RESTRAINTS:

Eco-friendly materials are not yet scalable due to sustainable suppliers having a very high minimum order quantity. This is driven by the immediate cost of lower impact materials, and a longer-term lack of R&D funding.

Currently have extremely limited recycling facilities, particularly for those which can handle hazardous chemicals. This establishes a need for a global textile waste collection and sorting ecosystem.

CONSUMER ATTITUDES:

Brands face pressure to have two or more seasons of big product range, partly driven by the speed of fashion cycles and trends. This results in overproduction and a lack of infrastructure to handle the waste.

INDUSTRY TRENDS:

Retail giants own the consumer space and current infrastructure encourages linear consumption. This results in customers lacking the knowledge of how to properly dispose of their shoes.

Brands don't prioritise circularity and taking risk because they are unsure of the business case for circularity. This establishes a need to rethink the economic model and rethink value.



Scalability and integration of sustainable materials
Lack of R&D funding, current supply chains set up for legacy materials

Cost & accessibility
Price premiums on new materials and high MOQs constrain change

Transparency & traceability
Materials difficult to trace, risk of greenwashing claims, lack of freely available supply chain data



Sustainability & eco design
High emphasis on eco-design standards but limited evidence of real-world application

Education and talent development
Shortage of design talent in key economies, lack of education in modern materials & methods

Innovation vs commercial pressures
Pace of fashion cycles demands newness but time and cost pressures hinder real innovation, over-reliance on legacy hero products



Innovation and quality control
Innovation hampered by outdated practices and standards not suited to modern materials

Regulatory challenges
Regulatory landscape can feel unclear and create uncertainty, slowing the adoption of new manufacturing practices

Operational issues
Several key operational challenges including plant & equipment, volume of SKUs, waste



Consumer perceptions
Consumers struggle to make informed product choices, sceptical of product claims, frustrations around fit consistency

Retail dynamics
Cost of maintaining bricks & mortar presence, retail giants own the consumer space, lack of retail staff expertise

Innovation & adaptation
Reverse logistics needs to level up for new circular business models, 3D printing opportunities at the distribution level left unexplored



Challenges in recycling
Limited recycling facilities, poor durability of products that are difficult to remake, complex multi-material constructions

Consumer education and engagement
Consumers accustomed to linear consumption models with insufficient product choice to support a major behaviour shift

Infrastructure
Industry lacks sufficient infrastructure to support circular models at scale, undermining the business case at brand-level

The Questions

1. What does tech-enabled creativity mean for the industry and consumers?
2. How should industry scale sustainable innovation through strategic partnerships?
3. Can brands integrate sustainability as a core competency?



*Visualisation experiment:
Midjourney generations of
“footwear of the future”
using workshop raw notes
as prompt inputs*

Consumers & Culture

Workshop overview:

This discussion was based on Dr. Alexandra Sherlock's research exploring the social lives of Clarks Originals shoes. With a particular emphasis on cultural sustainability, we considered how a better understanding of how shoes are used in different contexts can inform a more ethical and sustainable footwear industry answering the question:

How can cultural sustainability help us achieve authentic and meaningful products and strategies, consumer loyalty and a healthier corporate culture?



Insights:

Key theme: cultural sustainability at scale

We discussed where brands might sit on a cultural sustainability scale, ranging from anti-cultural and culturally sustainable to culturally regenerative.

Outcomes:

Defining practices that may or may not be culturally sustainable is subjective and requires further research, exploration and context.

Cultural sustainability is a journey not a destination. But certain practices require particular attention and continued reflection:

- Cultural appropriation
- Anti-social or anti-cultural IP claims
- Collaboration as a pathway to culturally respectful practices.

Brands recognised as exhibiting culturally sustainable qualities



Insights:

Additional themes

Creativity, innovation and authenticity emerge from cultural engagement. Brands accused of lacking innovation or being inauthentic may have dropped the 'cultural ball'

Fashion scandals indicate brands that may have become disconnected from their consumers' values, practices and beliefs.

Awkwardness about engaging directly with consumers, indicating a need for cultural mediators that can help relay stories and experiences to brands.

Execs across brand, marketing and design all need to be across the social lives of their shoes and the cultures within which their shoes 'live' to work 'in-step' to produce relevant and authentic campaigns and products.

Understanding how shoes are used and what they mean to consumers can inform end-of-life strategies e.g. deep attachment = opportunities for brand-led repair services.

The Questions

Culture is the foundation that enables all other sustainability goals to be achieved.

How can organisations and initiatives...

1. Connect with
2. Sustain
3. Regenerate

...cultural values, beliefs, worldviews, practices and customs?



GFFC Symposium

Summary Questions

We have built out questions around GFFC workshop discussions to crystallise our thinking and confirmed our direction of travel.

1. Learning

- How can we embed and promote lifelong learning as a catalyst for innovation?
- How can consumer education build trust, promote knowledge sharing, and cultivate loyalty?

2. Technology

- How can the strategic application of advanced technologies enhance the footwear value chain?
- What are the key opportunities and challenges associated with technology-driven creativity, and how do these impact on industries and their future development?
- How can we redefine innovation to focus on repair and refurbishment, and how can technology (AI) facilitate this shift?

3. Good Practice

- How can we create local, circular, zero-waste supply chains in footwear manufacturing? Who benefits and how?
- How can biological and synthetic circular material systems be integrated for mutual benefit?

4. Regulation

- What are the opportunities within regulation and compliance to act as stimuli for creativity and innovation in the footwear industry?

5. Equity

- What are the implications of climate challenges and ethical considerations in future footwear design, manufacture, sale, and disposal for different stakeholders?

6. Storytelling and Culture

- How can the social and cultural value of footwear positively impact purchasing decisions, brand storytelling and strategies in the global marketplace?

7. Cross-cutting Themes

- What are the key requirements for developing and cultivating multidisciplinary teams?
- How can strategic/cross sector partnerships be leveraged to scale, accelerate and innovate circularity and sustainable innovation?

What's Next?

GFFC's focus on educational, economic, cultural and social sustainability highlights the need for change in how footwear is designed, manufactured, marketed, and disposed of. The coalition is committed to ongoing dialogue and research to explore these critical issues

We are preparing to conduct more in-depth explorations of questions that have arisen from the symposium day in future discussions and research.

We will begin contacting stakeholders in early 2025. Please feel free to contact us.

info@theglobalfootwearfuturecoalition.com

GFFC December 2024

GFFC Global Footwear Future Coalition

A F O R U M F O R K N O W L E D G E E X C H A N G E