

NICHE MARKET INNOVATIONS IN THE ITALIAN FASHION INDUSTRY



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ISS Institute/TAFE Fellowship

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Executive Summary

The purpose of the Fellowship was to undertake an overseas study program in Italy, to:

- gain a comprehensive understanding of how the Italian Fashion Industry and Fashion educators are dealing with emerging trends of volume manufacturing in developing countries;
- to develop a number of technical skills

Globalisation of markets, changing consumer spending patterns and new technologies continue to transform the Australian Fashion sector, driving significant structural and organisational change. As phased tariff reductions continue towards targets of either five per cent or zero, further business restructuring is inevitable, and will continue to amplify the impact of globalisation of markets, changing consumer spending patterns and new technologies.

The fashion industry is globally registering a rebellion against mass-consumerism in favour of uniquely created items, integrating the ideals of Artisanship and Integrity of the product with the use of quality materials and construction methods. The aim is for the products to have an inherent feature of sustainability as opposed to being items characterised by a disposable nature. It is refinement and good design that distinguishes these products from those produced for 'generic mass consumption' with 'volume' driving design. In addition, there is a need for greater opportunities for smaller niche Australian businesses and brands that take pride in producing quality product and getting that product right, to develop and achieve and maintain a sustainable market. The response from enterprises has been to reform work organisation, develop niche markets, invest in new technology, and to place greater emphasis on training for new and emerging skills. As a result, this resilient and creative industry continues to employ more than 145,000 employees, with an estimated contribution to Gross National Product of an estimated \$12,000 million.

An obvious benefit to Australia in passing on skills of Italian fashion design and development, is the potential to improve the quality of training in fashion and subsequently giving people the skills required to maintain a viable fashion industry in Australia. Within Australia there is the potential to develop a business based on individuality of design, quality materials and construction, and good business practices. The skills and knowledge brought back to Australia will make it possible to adapt and extend training to include true artisan skills in a program developed for modern times countering the effects of mass production, plagiarism and cheap imports.

Training and education is central to building this knowledge, skill and business acumen along with expertise in fashion, style and design. It is essential to train new designers with an integrated training program and to provide them with the tools to succeed, and to enable them to be flexible and adaptable.

To ensure that the diminishing artisan skills included below are not lost but are developed and enhanced, skills that need to be enhanced include:

- Draping/Moulage (not included as a Unit of Competency in the current training package)
- Fabric Enhancement (also not included as a Unit of Competency in the current training package)
- Working with Wool Fabrics – using methods to complement the properties of wools as well as the new technologies used for wool fibres and; the blending/combination of Australian Wool with cotton, silk and linen

Executive Summary

Addressing the Gap:

The time spent travelling in Italy was approximately three weeks. The aim was to research niche market innovations and study training programs designed to assist in creating these niche markets. The ultimate aim was to return and develop the niche for unique Australian Fashion and to use the Italian design and style doctrine as a base to develop skills and knowledge that can be used to create fashion garments for the Australian lifestyle and climate using a wide range of materials and technologies currently available in Australia.

To achieve this aim, research was carried out into the current practices of Fashion Design Houses and Fashion Educational Organisations. Penton & Giacomini had booked back to back appointments visiting businesses, from the fabrication of materials, development of designers concepts, to the manufacture and production of garments, to embellishers of fabrics, and finally to the consumers in the boutiques. All these aspects had to be investigated to gain a comprehensive understanding of how a design comes to be realised. Several educational institutions were also visited that had strong links and contributed to Italy's established industry.

The following report provides an overview of the Fellowship experience and this is followed by a series of recommendations for Government, Industry, and the Business Sector, Professional Associations, Education and Training Providers, our Community and the ISS Institute. These recommendations also include suggestions for engaging in knowledge transfer activities.